LANGUAGES: THE STATE OF THE NATION

Demand and supply of language skills in the UK

February 2013

A report prepared by

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Alcantara Communications

BRITISH ACADEMY
for the humanities and social sciences

Alcantara
Communications

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Commissioned by the British Academy

Acknowledgements

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Foreword

Establishing the 'state of the nation' and reviewing the demand and supply of language skills in England, Northern Ireland, Scotland and Wales is no mean feat! This report is wide-ranging in scope, analysis and relevance to current education debates. It has been commissioned by the British Academy with the aim of drawing together the baseline data on the supply and demand of languages in the UK. Its findings present us with cause for both cautious optimism and rising concern regarding our preparedness for future challenges.

With around 1 in 6 school children in England having a foreign language as a mother tongue, we can take heart from the wealth of languages already spoken in this country. And we can celebrate the breadth of language courses available within our world-leading higher education institutions, even as we worry about the threat that some of them are under. But it is clear that the UK still has a long way to go in order to catch up with our European neighbours and international competitors. Too often, education policies are operating in isolation from user communities, ignorant of their requirements and ideals. Drawing on new research, Teresa Tinsley argues that a weak supply of language skills in the job market is pushing down demand and creating a vicious circle of monolingualism.

As the learned society and representative body for the humanities and social sciences, the British Academy has been an advocate for over a decade for the maintenance of language provision in our schools and universities. Languages are vital for the health and wellbeing of the education and research base, for UK competitiveness, and for individuals and society at large. With dedicated funding from the Department for Business, Innovation and Skills, the Academy launched a four year programme in 2011 in support of languages. Our aim is to show the value of languages and their place in building the UK's capacity.

This programme is delivered in a variety of ways: funding projects, developing policy and recognising achievement. Our current *Lost for Words* inquiry into the importance of languages for international security and diplomacy sits beside our annual Schools Language Awards which seek to reward inspiring language projects in schools across the UK. This *State of the Nation* report highlights just how valuable such initiatives are.

The good news is that we are not starting from scratch. The foundations are in place, not least in our diverse demographics and in our world-class higher education system. We must ensure that the government, business and education sectors work together to get the right messages through to our students so that we are better equipped to respond to the challenges and opportunities that the future holds.

PROFESSOR NIGEL VINCENT FBA
Vice-President, British Academy

About the author

Teresa Tinsley is a Hispanist with over 30 years' experience in national organisations devoted to languages education. As Director of Communications at CILT, the National Centre for Languages, from 2003 to 2011, her responsibilities included leadership of the organisation's information, research and publications activities. She established the 'Language Trends' series of reports and was responsible for annual compilations of statistics and policy developments published as Languages Yearbooks from 1995–2007. She was also closely involved in a number of European research projects on multilingualism and is currently a member of the European Commission's 'Languages in Education and Training' group.

Since founding Alcantara Communications in 2011, she has conducted policy-focused research on languages issues for the British Council and CfBT Education Trust, as well as the British Academy. She is currently preparing a PhD on intercultural relations in early 16th century Granada.

Summary Report

KEY MESSAGES

The British Academy commissioned a review of empirical data from England, Northern Ireland, Scotland and Wales seeking baseline data on the current demand and supply of language skills in the UK. Key findings from the report include:

- There is strong evidence that the UK is suffering from a **growing deficit** in foreign language skills at a time when globally, the demand for language skills is expanding
- The range and nature of languages being taught is **insufficient** to meet current and future demand
- Language skills are needed **at all levels** in the workforce, and not simply by an internationally-mobile elite
- A weak supply of language skills is pushing down demand and creating **a vicious circle of monolingualism**
- Languages spoken by British school children, in addition to English, represent a valuable **future source of supply** – if these skills can be developed appropriately.

These findings present us with cause for both cautious optimism and rising concern. Our diverse demographics and world-class higher education system provide us with the tools to respond to the challenges and opportunities of the future. Yet, too often, education policies are operating in isolation from demand. The report concludes that without action from government, employment and the education sectors, we will be unable to meet our aspirations for growth and global influence.

1. **Are enough people learning languages in the UK today to meet our current and future needs? Does supply match demand when it comes to the range of languages offered in our schools and universities? How well are we equipping people with languages, alongside other crucial employment skills? Are we providing a broad enough spectrum of the population with language skills?** The *State of the Nation* report,[1] commissioned by the British Academy, seeks to establish the baseline data in order to deepen our understanding of these issues and consider how best to address them.

2. 'Strategic deficits in language learning' have already been identified in policy and research papers prepared by the British Academy[2] among many

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1 This report was prepared by Teresa Tinsley (Alcantara Communications)
2 British Academy, '"That Full Complement of Riches": The Contributions of the Arts, Humanities and Social Sciences', 2004. British Academy, *Language Matters. The Supply of and Demand for UK Born and Educated Academic Researchers with Skills in Languages Other Than English*, January 2009. British Academy, *Language Matters More and More. A Position Statement*, 2011.

others. This report forms part of the Academy's language programme[3] and is the first comprehensive review of the empirical data available in England, Northern Ireland, Scotland and Wales. The report looks at:

- the policy background and health of language learning in each of the four parts of the UK
- the demand for, and current supply of, language skills in the workplace
- the UK's capacity to meet economic, social, cultural and intellectual needs through languages, both now and in the future.

3. It highlights language issues that the four parts of the UK have in common and, where they diverge, seeks to learn from their distinct experiences. The *State of the Nation* report, which will be updated at regular intervals, aims to monitor the situation and to provide stimulus for the development of future policy solutions.

4. The report draws on a wide range of data from government departments, employer organisations, examination boards and other national and international bodies. Two new pieces of research were also specially commissioned for this report:[4] the first, *Beyond English – Britons at work in a foreign language*, draws on a survey of UK employers known to be using foreign language skills in their work, conducted in collaboration with Rosetta Stone; the second, *Labour market intelligence for languages*, explores which languages are requested by employers and which sectors recruit for language skills, and identifies job roles and other related information.

5. As well as providing an evidence base for future policy development, the report makes the case for a more strategic approach to languages across British businesses, education and governments. This will boost Britain's capacity to influence global affairs and to hold its own in the ever evolving world of employment.

6. It is addressed to policymakers, advisers and planners in government, in employer organisations, and at all levels in the education sector. Its focus is on foreign languages – understood as those that originate outside the British Isles.

Key issues

7. The report highlights serious concerns about the fragility of language provision. The following key issues have been identified across England, Northern Ireland, Scotland and Wales:

a. **There is strong evidence that the UK is suffering from a growing deficit in foreign language skills at a time when global demand for language skills is expanding.** Approximately half of the demand identified as key to future economic growth is in languages which are difficult or impossible to study within the UK education system. Learning languages is rarely combined with the acquisition of other workplace skills. And language courses are seldom offered to learners with lower academic attainment.

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3 In 2011, the British Academy launched a four-year programme to support languages in the humanities and social sciences. Through this programme, the Academy is committed to a range of research support, partnerships, policy and other interventions – including a forthcoming report of an inquiry entitled Lost for Words, into the use and importance of language for the purpose of international security and diplomacy.
4 These are provided in the full report as Appendices 1 and 2.

b. **The range and nature of languages being taught is insufficient to meet current and future demand.** It is encouraging that at present there is clearly correlation between the languages taught and the languages most used in working contexts. However things are rapidly changing. Business and public sector organisations are already using a much wider range of languages in their operations.

c. **Language skills are needed at all levels in the workforce, and not simply by an internationally mobile elite.** Comparisons of recent National Employer Skills Surveys indicate that 17% (2009) and 27% (2011) of vacancies in administrative and clerical roles went unfilled due to shortages of foreign language skills.

d. **A weak supply of language skills is pushing down demand and creating a vicious circle of monolingualism.** Case studies of organisations interviewed for this report show that, in the absence of a strong supply of language skills in the labour market, large organisations may train existing staff rather than narrowing the field at the recruitment stage by advertising for linguists. Despite these important signals of demand, employers tend to obscure these deficits in the UK workforce by hiring native speakers, or eliminating language requirements from job adverts, or focusing their business strategy solely on regions where English is the dominant language.

e. **Developing language skills alongside others is rare.** This state of affairs is exacerbated by the fact that it is very uncommon for university students to take degrees combining languages with vocational or STEM subjects. This in turn limits the UK's ability to transfer domestic innovation or enterprise into international markets. While we are increasingly seeing new and innovative ways in which Higher Education Institutions are developing languages as core skills, there is very little policy development UK-wide that has attempted to combine language tuition with vocational or work-based skills. Wider enterprise and skills strategies have tended to give STEM subjects priority for policy development, frequently overlooking the contribution of language skills to the economy.

f. **Languages spoken by British schoolchildren, in addition to English, represent a valuable future source of supply, if these skills can be developed appropriately.** Ethnic minority community language teaching mostly takes place in the voluntary sector. 'Asset Languages' exams were introduced in 25 languages as part of the 2002 National Languages Strategy in England to enable a more flexible alternative to GCSE accreditation – however this range of languages is now to be discontinued. A report on community languages teaching in England, Scotland and Wales showed that at least 61 of the many languages spoken were already being taught to children of school age at complementary schools or centres run by parents.[5] This burgeoning supply of language skills must be built upon and harnessed for the benefit of the wider community. 2011 Census data shows that of the 4.2million (8%) of residents in England and Wales with a main language other than English, 3.3million (79%) could speak English very well or well. The second most reported main language was Polish (546,000 speakers), then Panjabi (273,000 speakers) and Urdu (269,000 speakers).[6]

g. **The spread of language learning within and between the four UK territories is uneven.** While it is possible to study for language degrees in 49 languag-

5 CILT, SCILT and CILT Cyrmu, *Community Language Learning in England, Wales and Scotland*, 2005.
6 2011 Census data released 30 January 2013, available at http://www.ons.gov.uk/ons/rel/census/2011-census/key-statistics-and-quick-statistics-for-wards-and-output-areas-in-england-and-wales/index.html

es in the UK as a whole, Northern Irish universities offer courses in only five different languages. Within England, A-level language entries varied greatly across different regions, ranging from over 4,000 in London to around 500 in the North East in 2011. At primary school level, language tuition has been made compulsory in Scotland, while in Wales similar schemes are only at the pilot stage.

h. **Where language learning is not compulsory, low levels of uptake are a cause for concern.** This is evident in England, for example, where the proportion of students sitting GCSEs in a foreign language fell from 78% in 2001 to just 43% in 2011 in the wake of the decision, in 2004, to make languages optional. In Wales, foreign languages have never been compulsory in secondary schools and uptake of language GCSEs is the lowest in the UK, representing just 3% of all GCSE subject entries.

i. **Engagement with languages across gender and socio-economic groups is unbalanced.** Studying a language to GCSE is more associated with advantage than not studying a language is with disadvantage. Nearly a third of linguists in Higher Education come from independent schools (while only 18% of the post 16 school population attend these schools), and in state schools just 14% of children eligible for free school meals obtained a good GCSE in a foreign language compared to 31% of other state school pupils.

j. **Recent fee increases, immigration policy changes and bad publicity relating to the handling of international students at certain Higher Education institutions may be offputting to international students.** This is forecast to have a disproportionate effect on the viability of Language Centres and postgraduate programmes requiring language proficiency as international students have been over-represented in these programmes.[7]
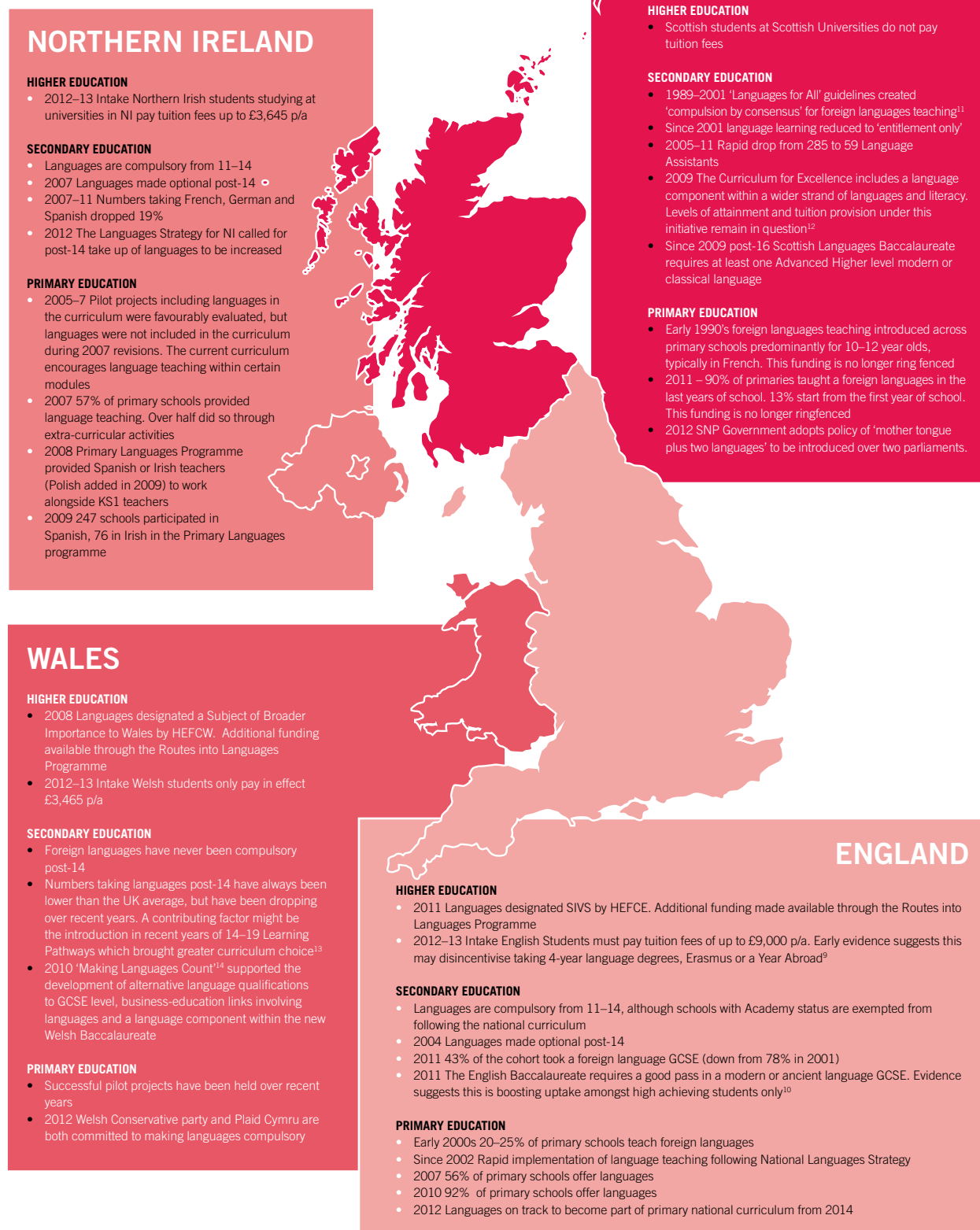
Policy Context

8. Policymakers across the UK share ambitions to create a better-educated workforce, providing more employment opportunities for young people and securing international trade, exports and foreign investment. Yet the CBI has put on record that the UK is held back globally by its reputation for poor foreign language skills.[8] The policy contexts in which these challenges are being met vary enormously across the UK, as illustrated in Figure 1. Concerns however, about the fragility of language provision and the difficulties of engaging learners, employers, course providers and government, are common throughout the UK.

9. By and large recent policy development in the different education systems has targeted language provision in primary schools and lower secondary schools. The Scottish Languages Baccalaureate is the exception, requiring post-16 pupils to continue with languages. Whilst language learning has increased at earlier stages, removing the compulsion to take languages at GCSE level has precipitated a drop in the study of languages from age 14 onwards. The uptake of foreign languages at A-level and Highers has remained stable at lower than desired levels, ranging from 5% of all

7 Nick Byrne, 'How University Language Centres Are Offering Integrated and Non-integrated Language Modules', *Association of University Language Centres*, 2009, www.aulc.org/meetings/01-2009/limerick_2009.html [accessed 1 January 2013]. See also John Canning, *Survey of Non-specialist Language Learners*, 2011 www.ucml.ac.uk/sites/default/files/Survey of non-specialist language learners 2011.pdf. Ruth Levitt and others, *Language Matters. The Supply of and Demand for UK Born and Educated Academic Researchers with Skills in Languages Other Than English*, 2009.
8 CBI/Ernst and Young.

Figure 1: Education and skills policy contexts in the four parts of the UK

NORTHERN IRELAND

HIGHER EDUCATION
- 2012–13 Intake Northern Irish students studying at universities in NI pay tuition fees up to £3,645 p/a

SECONDARY EDUCATION
- Languages are compulsory from 11–14
- 2007 Languages made optional post-14
- 2007–11 Numbers taking French, German and Spanish dropped 19%
- 2012 The Languages Strategy for NI called for post-14 take up of languages to be increased

PRIMARY EDUCATION
- 2005–7 Pilot projects including languages in the curriculum were favourably evaluated, but languages were not included in the curriculum during 2007 revisions. The current curriculum encourages language teaching within certain modules
- 2007 57% of primary schools provided language teaching. Over half did so through extra-curricular activities
- 2008 Primary Languages Programme provided Spanish or Irish teachers (Polish added in 2009) to work alongside KS1 teachers
- 2009 247 schools participated in Spanish, 76 in Irish in the Primary Languages programme

WALES

HIGHER EDUCATION
- 2008 Languages designated a Subject of Broader Importance to Wales by HEFCW. Additional funding available through the Routes into Languages Programme
- 2012–13 Intake Welsh students only pay in effect £3,465 p/a

SECONDARY EDUCATION
- Foreign languages have never been compulsory post-14
- Numbers taking languages post-14 have always been lower than the UK average, but have been dropping over recent years. A contributing factor might be the introduction in recent years of 14–19 Learning Pathways which brought greater curriculum choice[13]
- 2010 'Making Languages Count'[14] supported the development of alternative language qualifications to GCSE level, business-education links involving languages and a language component within the new Welsh Baccalaureate

PRIMARY EDUCATION
- Successful pilot projects have been held over recent years
- 2012 Welsh Conservative party and Plaid Cymru are both committed to making languages compulsory

SCOTLAND

HIGHER EDUCATION
- Scottish students at Scottish Universities do not pay tuition fees

SECONDARY EDUCATION
- 1989–2001 'Languages for All' guidelines created 'compulsion by consensus' for foreign languages teaching[11]
- Since 2001 language learning reduced to 'entitlement only'
- 2005–11 Rapid drop from 285 to 59 Language Assistants
- 2009 The Curriculum for Excellence includes a language component within a wider strand of languages and literacy. Levels of attainment and tuition provision under this initiative remain in question[12]
- Since 2009 post-16 Scottish Languages Baccalaureate requires at least one Advanced Higher level modern or classical language

PRIMARY EDUCATION
- Early 1990's foreign languages teaching introduced across primary schools predominantly for 10–12 year olds, typically in French. This funding is no longer ring fenced
- 2011 – 90% of primaries taught a foreign languages in the last years of school. 13% start from the first year of school. This funding is no longer ringfenced
- 2012 SNP Government adopts policy of 'mother tongue plus two languages' to be introduced over two parliaments.

ENGLAND

HIGHER EDUCATION
- 2011 Languages designated SIVS by HEFCE. Additional funding made available through the Routes into Languages Programme
- 2012–13 Intake English Students must pay tuition fees of up to £9,000 p/a. Early evidence suggests this may disincentivise taking 4-year language degrees, Erasmus or a Year Abroad[9]

SECONDARY EDUCATION
- Languages are compulsory from 11–14, although schools with Academy status are exempted from following the national curriculum
- 2004 Languages made optional post-14
- 2011 43% of the cohort took a foreign language GCSE (down from 78% in 2001)
- 2011 The English Baccalaureate requires a good pass in a modern or ancient language GCSE. Evidence suggests this is boosting uptake amongst high achieving students only[10]

PRIMARY EDUCATION
- Early 2000s 20–25% of primary schools teach foreign languages
- Since 2002 Rapid implementation of language teaching following National Languages Strategy
- 2007 56% of primary schools offer languages
- 2010 92% of primary schools offer languages
- 2012 Languages on track to become part of primary national curriculum from 2014

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9 This issue has been partially resolved for the academic year 2013–14 but remains a concern for future years. Department for Business Innovation and Skills, *Government Response. Consultations on 1. Students at the Heart of the System. 2. A New Fit for Purpose Regulatory Framework for the Higher Education Sector*, 2012.

10 Teresa Tinsley and Youping Han, *Language Learning in Secondary Schools in England. Findings from the 2011 Language Trends Survey*, 14 March 2012, www.cfbt.com/evidenceforeducation/our_research/evidence_for_government/national_policy_reforms/language_trends_survey.aspx [accessed 18 October 2012], S.Clemens, *The English Baccalaureate and GCSE Choices. DfE Research Brief,* 2011.

11 See Doreen Grove, *Talking the Talk, so that Scotland can Walk the Walk.The Economic Case for Improving Language Skills in the Scottish Workforce*, 2011.

12 The survey was reported in TESS, 'Poor language skills put Scots at disadvantage', 25/3/2011. 'Backlash from diplomats over language cuts', *Scotland on Sunday*, 4/12/11

13 National Assembly for Wales, *Enquiry into the Implementation of the Learning and Skills (Wales) Measure 2009*, 2012.

14 Welsh Assembly Government and Young Wales, *Making Languages Count*, 2010.

subject entries in Northern Ireland, down to 3% in Wales in 2012.[15] Within higher education, early evidence appears to show that the increasing fees for English students and English universities is also having an adverse effect on admissions to four-year language degrees, the Erasmus programme and Year Abroad schemes. Students seem to be deciding that the extra year spent learning a language abroad is simply too costly.[16]

Demand

Which levels of language proficiency are required?

10. The 2012 CBI Employer survey, based on responses from 542 companies, found that nearly three quarters of UK private sector employers see a need for – or at least a benefit in having – foreign language skills in their business.[17]

11. An overarching review of evidence identified five different levels of demand for language skills:

Figure 2: The structure of the jobs market for languages
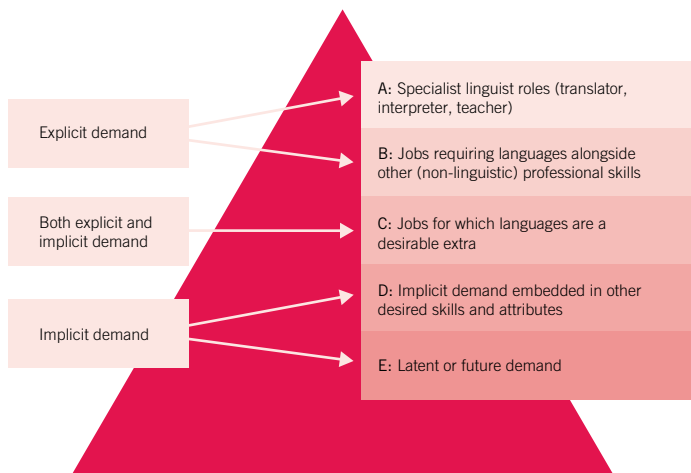
12. Specialist linguist roles (e.g. Translation, Interpreting, Teaching) account for only a small proportion of jobs – around 6% – which require languages (A). There are ongoing needs for native-English speaking interpreters and translators in international organisations such as the UN and the European Parliament, and a current crisis in the provision of public service interpreters within the British justice system. The demand for teachers of languages is also expected to increase as new policies in both primary and secondary education take hold in various parts of the UK.

13. The greatest proportion of jobs for which language skills are a must is spread throughout many occupational sectors – typically in combination with other workplace skills (B). Labour Market Intelligence conducted in preparation for this report identified 'accounts', 'marketing or PR' and 'sales' (amongst others) as terms commonly used in advertisements for

15 JCQ, Results 2012 - Provisional GCE A-level Results June 2012, 2012. Scottish Qualifications Authority, 'National Course Results Statistics 2012 (Pre-appeals)', 2012.
16 See British Academy-UCML Position Statement, Valuing the Year Abroad, 2012.
17 CBI/Pearson, 'Learning to Grow: What Employers Need from Education and Skills', 2012.
CBI/EDI, Building for Growth: Business Priorities for Education and Skills, 2011.
CBI/EDI, Ready to Grow: Business Priorities for Education and Skills, 2010.
CBI, Emerging Stronger: the Value of Education and Skills in Turbulent Times. Education and Skills Survey, 2009.

jobs with languages.[18] Jobs are regularly advertised for which languages are noted as desirable but not essential (C). The 2012 CBI/Pearson Education and Skills Survey found that only 28% of responding employers said they had no need for language skills at all, although few are explicit about this at the point of recruitment. Level C therefore includes both explicit and implicit demand for languages.

14. Employers value not only language skills per se, but the inherent skills and attributes – in particular the international and cultural awareness – that speaking a foreign language brings (D). The report also identifies strong indications that the need for language skills is increasing and that there is latent or unrealised demand implicit in the behaviour of employers (E), for example, in the recruitment of foreign nationals. In a survey of employers in more than 30 European countries[19], UK employers emerged as the most enthusiastic recruiters of graduates from outside the EU, with 49% recruiting from outside Europe, compared to an average of only 21%. The UK was also among the top countries for recruiting graduates from other European countries: 57% of UK employers recruit from other EU countries, compared to an average of 30%.

Which languages are in demand?

15. Currently a large proportion of the explicit demand for language skills – around half – is for the major western European languages most frequently taught within UK schools: French, German and Spanish. It is encouraging that links clearly exist between the languages taught and the languages most used in working contexts at present. However this is increasingly not the case in the UK.

16. The *State of the Nation* report draws together evidence highlighting that businesses and public sector organisations are already using a much wider range of languages in their operations. Indications of future demand show that a growing number of languages will be needed as the UK expands its global connections and responds to new economic realities. These include not only world languages such as Mandarin, Arabic and Russian – but also Turkish, Farsi and Polish. Without a system of language provision that can respond to the speed of globalisation, communication and mobility between people and places, we are already at a disadvantage.

Where are languages needed?

17. Languages are used in every sector of the UK economy, and in the public and voluntary sectors as well as in private enterprise. IT, Finance and Creative/Media/Marketing have been identified as particular industries where there is currently an above average or growing need for language skills.

18. Although most jobs with languages are based in London and the South East of England, evidence linking language skills to better business performance and penetration of new markets is relevant to all the regions of the UK. If businesses are to achieve growth, languages are a 'must-have'. Promoting languages enhances the overall skill levels of the population, encourages international engagement and attracts foreign direct investment. Outside London and the South East, there are indications of a particular need to stimulate explicit demand for language skills.

18 Graham, 2012.
19 Eurobarometer and European Commission, *Employers' Perception of Graduate Employability Analytical Report*, 2010.

19. Language skills are needed at all levels in the workforce, and not simply by an internationally mobile elite. Comparisons of recent National Employer Skills Surveys indicate that 17% (2009) and 27% (2011) of vacancies in administrative and clerical roles went unfilled due to shortages of foreign language skills. Widening access to language learning represents a key challenge for language education policy.

Supply

20. 39% of the UK adult population claim to be able to speak at least one language, besides their mother tongue, well enough to have a conversation.[20] This compares to an average of 54% across 27 European countries. Around a quarter of that proportion have a language other than English as their mother tongue, meaning that UK language capacity is significantly provided by people who already use another language in their homes and families.

21. The languages spoken by British schoolchildren, in addition to English, represent a valuable future source of supply, if these skills can be developed appropriately. In England, for example, 15% of primary and secondary schoolchildren speak English as an Additional Language.[21] London is generally regarded as the most multilingual city in the UK and the latest research puts the number of languages spoken there at 233.[22]

22. Mapping and naming the languages and the numbers of speakers is the first step towards the strategic development of mother tongue language skills. A report on community languages teaching in England, Scotland and Wales[23] showed that at least 61 of the many languages spoken were already being taught to children of school age at complementary schools or centres run by parents. It also found that as many as 35 languages were being offered by mainstream schools, either as part of the core curriculum or as an enhancement after school hours. This burgeoning supply of language skills must be built upon in order to harness its value for the wider community.

What is the state of language provision in UK schools and universities?

23. Languages are already very vulnerable in higher education and likely to become more so. Although actual numbers of students have flatlined over the last decade, rather than declined absolutely, they represent a narrowing share of overall student numbers. Linguists accounted for just 3% of undergraduates in the academic year 2010/11.[24] Of this 3%, just over a sixth represents EU or international students. Indeed, the number of UK domiciled undergraduates taking language courses has dropped by 5% since 2001/2.

24. Information from August 2012 shows that UCAS acceptances for European language courses are down 10% and those to non-European language courses have dropped over 14%. This is almost three times

20 European Commission, *Europeans and Their Languages. Special Eurobarometer 386*, 2012.
21 DfE, 'Maintained Primary and Secondary Schools. Number and Percentage of Pupils by First Language', 2012.
22 P. Baker and John Eversley, *Multilingual Capital: The Languages of London's Schoolchildren and Their Relevance to Economic, Social and Educational Policies* (London: Battlebridge, 2000).
23 CILT, SCILT and CILT Cyrmu, *Community Language Learning in England, Wales and Scotland*, 2005.
24 HEFCE, 'Data on Demand and Supply in Higher Education Subjects', 2012 www.hefce.ac.uk/data/year/2012/dataondemandandsupplyinhighereducationsubjects/ [accessed 2 January 2013].

greater than the general reduction in applications which has been witnessed across all subjects since 2011.[25] Early evidence attributes this to the changing fees regime.

25. The position of languages in state-maintained schools indicates that this vulnerability will be ongoing. Declining numbers of learners UK-wide are opting to take language subjects beyond the compulsory phase and attrition levels after GCSE are also high. Only 9% of pupils taking French to GCSE progress to A-level, for example.[26] Following its recent research survey, the European Commission has drawn attention to the very low levels of foreign language competence being achieved by pupils towards the end of compulsory education. We are a long way from our ambition to create a multilingual workforce able to reap maximum advantage from the Single Market.

26. More positive indications are provided by stable and slightly increasing participation at A-level/Highers in Northern Ireland and Scotland respectively, and by the fillip to numbers taking GCSE language courses in England provided by the English Baccalaureate. A survey for the Department for Education (DfE) in 2011 found that 52% of Year 9 pupils were going into GCSE languages classes the following school year[27], which compares with 40% of the Year 11 cohort who took the exam in the same year.[28]

27. However, comparison to international education systems has raised questions regarding the quality of language courses in English schools. This in turn has implications for Wales and Northern Ireland where the same assessment systems are in use. Indeed, England's results for levels of achievement in first and second foreign languages were at or very near the bottom out of all participating European countries in the European Survey on Language Competences. Only 9% of those surveyed were deemed to be at the 'level of independent user' (which broadly corresponds to the grades A*–C at GCSE).[29]

28. Language education in the UK is largely based on three European languages: French, German and Spanish. Opportunities to study or obtain qualifications in other languages are more limited. There is a mismatch between: (a) languages offered in schools (beyond the 'big three'); (b) languages in which it is possible to train as a teacher; (c) languages in which formal accreditation is available; and (d) languages spoken by schoolchildren. At university level too there are limited opportunities to take degree courses in some of the languages most strongly represented in the school population, such as Panjabi, Urdu and Polish. This is in spite of growing numbers entering for less traditional A-level language exams. Polish, for example, has seen A-level entries double over the past three years, whilst Russian, Arabic, Turkish and Portuguese entries have risen between 19% and 26%. Concerns about the barriers to moving language teaching from an 'enrichment' option to mainstream curriculum offer, in the case of Mandarin, for example, were raised in 2007.[30] These might partially explain the disconnect between wide language capacity within schools and the narrow formal accreditation on offer to students.

25 'UCAS Applicant Statistics 23 August 2012' www.ucas.ac.uk/about_us/media_enquiries/media_releases/2012/20120823.
26 DfE, 2012, Subject progression from GCSE to AS and continuation to A-level.
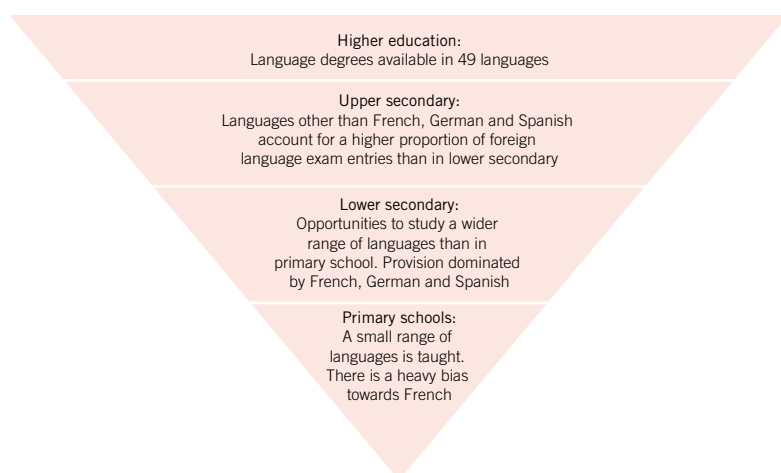27 Clemens.op. cit.
28 Tinsley and Han.op. cit.
29 European Commission, *First European Survey on Language Competences. Final Report*.
30 CILT, *Mandarin Language Learning. Research Study. Department for Children, Schools and Families*, 2007.

29. Opportunities to study a wider range of languages open up as the learner passes through the system. Unlike their STEM contemporaries, students opting to study languages in higher education are unconstrained by the requirement for certain A-level combinations or GCSE choices. While in primary schools there is a focus on a very small range of languages, at secondary level there are comparatively more options, and in higher education a very wide range of languages is available within the UK as a whole, albeit not in all four parts of the UK. This model (Figure 3) appears to have developed somewhat organically but could provide the foundation for building a more strategic approach in future:

Figure 3: Diversity in language education – UK overview

Higher education:
Language degrees available in 49 languages

Upper secondary:
Languages other than French, German and Spanish account for a higher proportion of foreign language exam entries than in lower secondary

Lower secondary:
Opportunities to study a wider range of languages than in primary school. Provision dominated by French, German and Spanish

Primary schools:
A small range of languages is taught. There is a heavy bias towards French

Who is more likely to learn a foreign language?

30. Four out of five undergraduate linguists study in pre-1992 institutions, compared to half that proportion across all subjects.[31] Languages tend not to be combined with STEM or more vocational subjects at university and even less so in schools and colleges. Business studies is the most common 'vocational' degree subject to be combined with languages. Nonetheless, Brits generally have positive attitudes towards foreign language learning – a special Eurobarometer survey found that 72% of UK residents agreed with the statement that 'Everyone in the EU should be able to speak at least one language in addition to their mother tongue'.[32]

31. Language learning is strongly associated with social advantage, starting from primary school and becoming particularly evident in achievement figures at GCSE, A-level and in acceptances to university courses. Indeed, nearly a third of linguists in higher education come from independent schools (while only 18% of the post-16 school population attend these schools). Furthermore, just 14% of children eligible for free school meals obtained a good GCSE in a foreign language compared to 31% of other pupils. Conversely, Chinese, Asian and Mixed Race pupils, and those who speak English as an Additional Language, are more likely to gain a good GCSE in a language subject than pupils whose ethnicity is Black or White, or who speak English as their first language.

32. A greater proportion of females to males take languages and this disparity becomes more marked as learners progress through the system. At
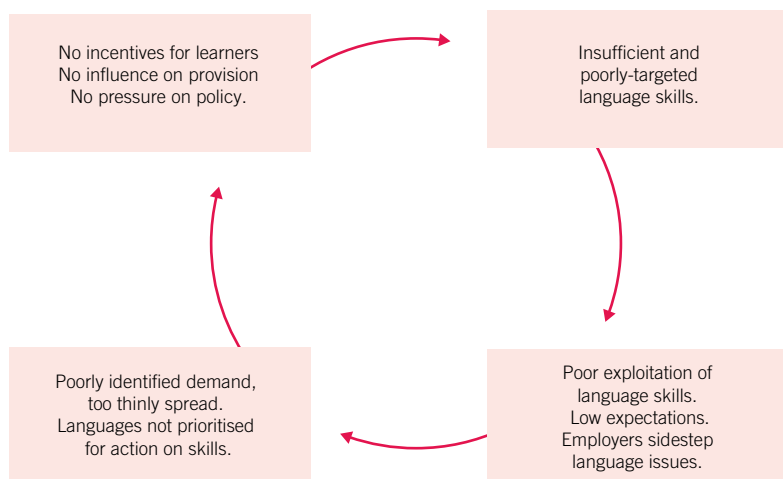
31 CILT, 'HE Language Students in the UK 2002–03 to 2008–09 Annual Analysis of HESA Data' (CILT, the National Centre for Languages, 2010).
32 European Commission, *Europeans and Their Languages. Special Eurobarometer 386*, 2012.

university, languages constitute the most gender-marked of all subject groupings. Just 33% of languages students are male.[33]

Mismatch of supply and demand

33. The precise extent of language needs in the workforce is difficult to quantify because of the amount of demand which is implicit or latent. However, there is strong evidence to confirm that the UK is suffering from a growing deficit in foreign language skills at a time when demand for language skills is expanding.

34. The *State of the Nation* report identified the mismatch between demand and supply in three key areas:

   a. **Around half the demand identified as key to future economic growth involves languages which are difficult or impossible to study within the UK education system**. Although the languages most commonly taught in schools and universities account for a large proportion of demand, at least half the demand identified as key to future economic growth is in languages which are either not available to study formally, or have only a weak presence in UK universities. Turkish, Farsi, and Polish are notable examples and in Northern Ireland, for example, it is only possible to study French, German, Spanish or the Celtic languages as a degree course. Many languages which are deemed strategically important have a relatively strong presence in the UK population through families with an immigrant background, but there are no strategies to develop this pool of skills.

   b. **Learning languages is rarely combined with the acquisition of other workplace skills.** The need for languages in a wide range of employment sectors contrasts strongly with the low incidence of languages being studied alongside workplace skills, STEM subjects or vocational courses. HESA headcounts have revealed that a mere 320 students are studying degrees which combine languages with Maths, only 171 combine languages with Marketing and just 8 are recorded as studying languages alongside molecular biology, biophysics or biochemistry.[34] Yet employers say their biggest obstacle to recruiting staff with language skills is finding the right mix of languages and other transferable skills. There is also very little evidence of languages being combined with subjects related to the sectors in which they are most in demand.

   c. **Language courses are seldom thought relevant to learners with lower academic attainment.** The provision of language courses in formal education has typically been based on the assumption that it is only the academically able who are likely to use languages in their work. However this is not borne out by the evidence. Instead, there is a need for language skills at all levels in the workforce. Some of the biggest skills gaps are amongst care workers, driving instructors and 'elementary' level staff.

34. This points very strongly to the need for action at school and college level to achieve a spread of language skills across the full range of educational ability. Whilst policies such as the English Baccalaureate are already intended to open up opportunities for the academically able of all backgrounds, action is also needed to improve the match of supply

33 CILT op. cit.
34 CILT, 'HE Language Students in the UK 2002–03 to 2008–09 Annual Analysis of HESA Data' (CILT, the National Centre for Languages, 2010).

and demand for language skills with work skills across the occupational spectrum.

Market failure

35. Evidence linking language skills to better business performance and the ability to access new markets is strong. Employers have made clear that they want to see more people come into the workforce with at least a basic knowledge of foreign languages, along with a more globally-attuned mindset. The British Chambers of Commerce, for example, has called for languages to be made compulsory for all up to AS level.[35] Yet these requirements have not been translated into incentives for either learners or for course providers to make this a reality.

36. The report concludes that this state of affairs has to do with the way that UK employers respond to the weak supply of language skills, which interferes with the smooth-functioning of market forces. There is evidence that they may underestimate their current and future needs, or avoid language issues by dealing only with people who speak English. Some train existing staff in language skills as an alternative to recruiting directly, but the most common way of fulfilling needs is by appointing native speakers.

37. The presence of native speakers not only raises the bar for British candidates who have to compete with them, but at the same time 'spoils the market' in language skills by diluting messages emerging from skill surveys about the lack of language skills in the UK labour force. It also blunts the information which is then made available to learners, course providers and policymakers. Such market failure is damaging to the interests of UK nationals.

38. This vicious circle is summarised in Figure 4. Because policy interventions on languages have tended to address the learner dimension in isolation from the demand side, they have not, as yet, been powerful enough to make the market for language skills work effectively.

Figure 4: Market failure in languages

No incentives for learners
No influence on provision
No pressure on policy.

Insufficient and poorly-targeted language skills.

Poorly identified demand, too thinly spread. Languages not prioritised for action on skills.

Poor exploitation of language skills. Low expectations. Employers sidestep language issues.

35 British Chambers of Commerce. op. cit.

39. **There is much to be done.** There must be a strategic approach to stimulating both demand and supply, better ways of identifying and expressing the need for languages, and support for better management of language skills by businesses in order to derive the associated benefits. Yet, the groundwork has already been laid. Language education policy at school, college and university level has great potential to be developed in ways which support the UK's aspirations for growth and global influence.

Key priorities for action

1   Develop a **strategic approach** to providing a **wider range** of languages for the workplace, adding to rather than replacing current provision.

INVOLVES
- Government
- Providers
- Employers
- Wider community

2   Increase the **number** and **social spread** of language learners in schools.

INVOLVES
- Learners
- Providers
- Government

3   Provide more courses at all levels which **combine languages** with the development of other vocational skills, including STEM subjects.

INVOLVES
- Providers
- Government
- Employers

4   **Stimulate demand** and **support employers** in the effective management of language skills.

INVOLVES
- Employers
- Government
- Providers

5   **Improve information-gathering** for identifying demand for languages in the economy and within specific industries, and the way that this is communicated to learners and course providers.

INVOLVES
- Government
- Employers
- Providers
- Other agencies

Chapter one

Introduction

Purpose and scope of the report

The British Academy's language programme[36] was launched in 2011 in order to address 'strategic deficits in language learning' as identified in previous policy and research papers.[37] The *State of the Nation* report was commissioned in order to achieve a greater understanding of the nature of those deficits and how best they might be addressed. It brings together evidence on both supply and demand for languages, and asks whether enough people, across a broad spectrum of social groups, are learning languages at an appropriate level to meet the country's economic, social, cultural and intellectual needs. It also explores whether the balance of different languages being learned is appropriate.

The report is addressed to policy makers, advisers and planners in government, in employer organisations, and at all levels in the education sector. The scope of the report is UK-wide, highlighting issues that England, Scotland, Wales and Northern Ireland have in common and, where they diverge, seeking to learn from their distinct experiences. Its focus is on **foreign** languages – understood as those that originate outside the British Isles.[38]

The move to a student-led system in higher education requires more and better information to be made available about future prospects and employment opportunities linked to different subject choices and, as in common with other disciplines, languages are under pressure to demonstrate their contribution to the economy. In the school system too, students face difficult subject choices at crucial transition points. Despite strong statements by employers' organisations, concern about participation and provision in languages is running at a high level across the UK at both school and university levels. It is therefore intended that this report should provide evidence for a more informed understanding of the labour market for languages. Beyond bringing together this evidence, the report also seeks to understand the reasons behind the identified deficits and to provide analysis and interpretation to deepen understanding of the way market forces are working in relation to languages.

The report takes a broad view of the concept of 'demand', and considers not just the requirements currently reported by employers, but also takes into account societal trends – in the global economy, in the make-up of UK society, in working practices – that may affect future requirements for foreign

36 In 2011, the British Academy launched a four-year programme to support languages in the humanities and social sciences. Through this programme, the Academy has committed to a range of research support, partnerships, policy and other interventions.

37 British Academy, '"That Full Complement of Riches": The Contributions of the Arts, Humanities and Social Sciences', 2004. British Academy, *Language Matters. The Supply of and Demand for UK Born and Educated Academic Researchers with Skills in Languages Other Than English*, 2009. British Academy, *Language Matters More and More. A Position Statement, 2011*.

38 See discussion on terminology, below.

languages. It recognises also that the value of learning a new language goes far beyond its practical utility for working life.

The report will be updated at regular intervals, in order to monitor trends longitudinally as well as to introduce new perspectives on the debate in response to changing circumstances. It seeks to assess the impact of policy initiatives and other changes which impinge on languages across different sectors of education and employment; thus enabling policy measures to be considered holistically and with a medium to long term perspective rather than focusing only on short term impact in isolated pockets.

It highlights the relevance of languages to policy debates including:

- UK trade and competitiveness in the international economy;
- the skills and employability of the workforce;
- Strategically Important and Vulnerable Subjects (SIVS) in higher education;
- the national curriculum in schools;
- the reform of vocational education;
- the increasing diversity of UK society.

The case for improving languages provision

The arguments in favour of improving the quality and extent of language learning have been well made not only by the British Academy, but also by employers organisations,[39] language organisations including the Universities Council of Modern Languages (UCML) and the Association for Language Learning, the All Party Parliamentary Group on Modern Languages, and indeed by successive Governments.

A recent publication by the Education and Employers Task Force, in conjunction with business and head teacher organisations, stressed the economic case and the impact of poor language skills on 'UK PLC'.[40] This chimed well with the increasing expectation, particularly in higher education, that all subjects should be able to demonstrate their contribution to the economy. Acknowledging the importance of student choice, it put forward employer engagement as a way of incentivising take up and demonstrating the relevance of language learning to students. This report aims to provide further stimulus for this debate and a broader perspective on possible policy measures.

While acknowledging the importance of languages for the economy, language associations have also stressed the disproportionate impact recent declines in language learning have had on young people from less advantaged social backgrounds, and the consequent risk of language learning becoming the preserve of a social, economic and intellectual elite.[41] The All Party Parliamentary Group on Modern Languages, along with UCML and others, has highlighted the low level of British participation in work and study placements in other countries funded under European Union programmes.[42] UK participation in overseas university placements under the Erasmus programme is around one third that of

39 Anthony Mann and others, *The Economic Case for Language Learning and the Role of Employer Engagement*, 2011.
40 Mann and others op. cit.
41 'Government Reform of Higher Education. Written Evidence Submitted by the University Council of Modern Languages (UCML)'. Association for Language Learning Response to Government Consultation on Qualifications at Key Stage 4.
42 All Party Parliamentary Group on Modern Languages, Submission on the Government's Review on the Balance of Competences between the United Kingdom and the European Union.

France and Germany, with only 8,577 Britons benefitting in 2010/11 compared to more than 25,000 in both France and Germany.[43] Research into reasons why students from different countries did not take part in such placements found that deterrent effect of lack of foreign language skills was highest amongst UK students (62% compared to an average of 41% across all countries).

The British Academy has made clear that the national need for languages goes far beyond the competitiveness of individuals or companies in the global economy.[44] The ability to understand the languages and cultures of others holds 'non-market' value for society and for intercultural relations at home and abroad. Language study is intellectually and culturally beneficial in its own right and language should be seen both as an object of study and a means of accessing knowledge in other fields.

There is a vast scientific literature exploring the cognitive effects of speaking/ learning to speak another language and it goes far beyond the scope of this report to review this. However, a number of recent studies are of particular relevance to the notion that foreign language capability makes a unique contribution to the country's intellectual base.

A review of the literature by Marsh and others found clusters of evidence for cognitive advantages associated with being able to speak more than one language including: enhanced mental flexibility and problem-solving, expanded metalinguistic ability,[45] superior memory function, especially short-term memory, enhanced interpersonal ability in perceiving the communicative needs of others, and reduced age-related diminishment of mental capacity.[46] The study concluded that knowledge of more than one language appears to help people realise and expand their creative potential.

A recent piece of new empirical research looked at the impact of foreign languages on decision-making.[47] It found that in making decisions, people are less susceptible to being influenced by biased questions when they use a foreign language. Its authors believe that a foreign language provides greater cognitive and emotional distance than a native tongue, forcing people to be more deliberate – and therefore more rational – in their decision-making.

From a different perspective, a study of international journalism highlighted a skew in the reporting of international issues which was language-related.[48] The study looked at the reporting of scepticism on climate change in newspapers with different political standpoints in 6 different countries. It found that the English language newspapers reported sceptical voices much more frequently, and that these tended to be politicians rather than scientists. It attributed this to political lobbying in English-speaking countries which created a different overall balance of reporting on the issue from that in non-English speaking countries.

Methodology

The work first reviewed the policy context for languages across the UK and identified key issues for further investigation. These form the main research

43 European Commission, *Erasmus Figures 2010–11*, 2011.
44 British Academy, 2011, *Language Matters More and More.*
45 The understanding of language dynamics and how language is used to achieve specific goals in communication.
46 Marsh et al., 2009, Study on the contribution of multilingualism to creativity, European Commission.
47 Keysar, Kayakawa and An, 2012.
48 Reuters Institute for the study of International Journalism, 2011, Poles apart: the international reporting of climate scepticism.

questions and a structure for reviewing the evidence base. This drew on a large number of sources with the aim of including all the most current information (i.e. that published in the last 3 to 4 years) on the supply and demand for language skills across the UK. As well as reviewing a wide variety of existing published sources, two new small-scale pieces of research were carried out especially for this report in order to provide new insights. All the sources have limitations and caveats:

• Sources of evidence on demand

The UK Commission on Employment and Skills' (UKCES) National Employer Surveys (carried out biennially) were an important source of data. They cover a large sample of employers nationwide, focusing on skills shortages and deficits in the existing workforce. However they are not specifically focused on languages and not powerful enough to draw out the full extent of demand for languages, or to provide any detail about needs, such as which languages are required. The UKCES also commissions Labour Market Intelligence specifically on languages and intercultural skills and the report has drawn heavily on this, verifying and updating the information provided, as well as developing the analysis and interpretation of findings.[49]

Surveys by employer organisations, which were generally conducted on a national scale with high enough numbers of respondents to give a reasonable level of reliability, provided another important source. They included findings from the CBI, British Chambers of Commerce, Federation of Small Businesses and Institute of Directors.[50] Those of the CBI and the British Chambers of Commerce included whole sections on language issues, including which languages were needed, although they tended to rely on the opinion of the individual respondent rather than on an expression of the behaviour of the actual business. They are also inevitably skewed towards the private sector and do not take into account the use of languages in other contexts. Data from a wide-scale European survey of employers provided a valuable comparison with attitudes in other countries.

Indications on future demand for languages came from a variety of reports on the economy, on international trade and on employability, published by government, national organisations including UKCES, Sector Skills Councils, the Association of Graduate Recruiters and the Council of Industry and Higher Education (CIHE), employer organisations and universities. The report also drew on the British Academy's recent consultation on the need for languages in UK diplomacy and security.[51] It includes trade statistics and academic analyses of these.

The two new pieces of research were a relatively small-scale survey of employers known to be using languages in their work (57 respondents), and an analysis of job advertisements including languages. The survey of employers was carried out in collaboration with the language course provider Rosetta Stone. It asked specifically how languages are used in employment – by which members of staff, in which job roles, which languages are required and which types of skills at which level.[52] It has the merits of being extremely current, and

49 CILT, 'Labour Market Intelligence for the Qualifications Strategy for Foreign Languages and Intercultural Skills', 2008. Anne Marie Graham, 'Labour Market Intelligence: Languages and Intercultural Working', *CfA business skills @ work*, 2012.
50 See bibliography for full references in this summary.
51 British Academy, *Lost for Words Inquiry, forthcoming*.
52 Teresa Tinsley, *Beyond English: Britons at Work in a Foreign Language. Findings from a Survey of Employers*, 2012. See Appendix I.

including a diverse range of employers of different sizes in different sectors, including public and charity sector employers. Case studies derived from interviews undertaken for this survey are included in the main report.

The second new piece of research, carried out by Anne Marie Graham of Arqueros Ltd, is an analysis of advertisements for jobs involving knowledge of foreign languages, updating and verifying a previous study undertaken as part of the University Council on Modern Languages' Shaping the Future project.[53] This was carried out during the period June to September 2012 and is based on over 1,000 job advertisements posted on 4 carefully-chosen job sites. The data provides a useful addition to other sources of intelligence since it measures actual rather than reported behaviour and includes jobs based overseas. However, it is clearly not a comprehensive picture of the jobs market and may understate demand because of its timing during the London 2012 Games, which may have affected the volume of recruitment activity.

Gaps in data available on the demand side include a dearth of fine-grained information in relation to specific sectors or sub-sectors of the UK economy. All the sources except the analysis of job advertisements were highly reliant on self-reporting and therefore potentially on the prejudices and views of individual respondents. The use of a wider range of methodologies – for example, observation – in bringing forward evidence on the demand for languages would provide a welcome additional perspective in future.

• Sources of evidence on supply

Much more data and statistical information were available on supply than on demand, and the selection of what to include was made on the basis of what was likely to provide the best answers to the research questions. There was not always data available for the four parts of the UK, and when available, it was not always completely comparable. Where possible, relevant information is provided for England, Northern Ireland, Scotland and Wales; where this is not available, the report uses the evidence which does exist, which may refer to just one nation or to the UK as a whole. Statistical data are taken from sources including the Higher Education Statistics Agency (HESA), Universities Central Admissions Service (UCAS), Examination entries and results, School Censuses and Performance tables. The report uses the most recent data available: school examination statistics and university admissions data from summer 2012, and higher education student statistics from the academic year 2010/11.

Data covering the university sector were particularly problematic because of discrepancies in the ways in which universities report student numbers, and the usual publication format which, rather than referring to individuals, aggregates them as 'full-time equivalents' for funding purposes. For some purposes (e.g. for considering the gender balance) this presentation is satisfactory, but in order to obtain information on actual numbers of individuals studying languages, tailored data cuts had to be commissioned from HESA. However, the problem of inconsistent university reporting is still an obstacle to full transparency and further work needs to be done in future years in order to present a truer picture of the full complexity of language study in the university sector.[54]

One extremely important and significant source on supply, published in 2012, was the European Survey on Language Competences. This was the first

53 Anne Marie Graham, 'Labour Market Intelligence for Languages – a Picture of the Jobs Market, Summer 2012'. 2012. See Appendix 2.
54 A discussion of the issues involved is included as Appendix 3.

international measure of language learning outcomes in education systems, comparable with international surveys for other types of achievement such as PISA.[55] The report also uses findings from the Eurobarometer survey of adults in 27 countries on self-reported language ability.

Surveys carried out by organisations including SCILT, CfBT and NFER have provided further useful data, as well as research commissioned by the DfE. Reports by Parliamentary Select Committees, national bodies such as Ofqual, Ofsted, Estyn and HEFCE have provided further insights, as well as specific studies by individuals and academics. Sections on the availability of different courses on languages have been derived from course searches on the websites of UCAS, GTTR (Graduate Teacher Training Registry) and Prospects.

In order to show the interconnectedness and co-dependency of the different education sectors, the available information on supply was set out thematically rather than sectorally. In order to provide evidence of the impact of various policies, particular attention was given to trends over the last 4 years, with some comparisons from 10 years ago where this was readily available and relevant. The findings were set out systematically to provide a point of comparison with the evidence collected on demand.

The main gaps in evidence on the supply side were:

- Data about language skills in the population. The results of the 2011 Census were not published at the time of writing this report. Its question on languages ('What is your main language?') will provide some further information on this, although not on languages spoken by those who consider their main language to be English.
- Language learning by adults. There have been no recent surveys or reports on this since the 2006 Adult Learning Inspectorate report 'Languages for Adults: overcoming the barriers'. This was not considered current enough to include in the present report and there is thus a major gap. Researching the extent of language learning by adults would need to take into account the multiple ways in which people can learn languages by self instruction as well as enrolment on courses provided by universities, language institutes and local adult education providers.
- Unreported language learning in higher education. The report recognises that there may be a considerable numbers of higher education students whose language learning is not recorded in available statistics. This may be because universities fail to report it, or because it accounts for only a small portion of their degree, or because it is extra-curricular or non-accredited. Others may acquire language skills informally, whilst on Erasmus placements, or through self-instruction.
- Teacher supply. The Teaching Agency conducts a detailed assessment of the supply and demand for language teachers, however no information was able to be made public from this source within the time frame of this report.

It is hoped that some of these gaps in information, both on the demand side and the supply side, can be plugged with focused research and, where necessary, Freedom of Information requests, to feed into subsequent editions of this report.

- Analysis and commentary

The report includes a degree of analysis and interpretation of findings exploring

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55 European Commission, *First European Survey on Language Competences. Final Report*, 2012.

the reasons behind the deficits and identifying key issues to feed into further policy development. It sets out a model for understanding the workings of the labour market in languages and the current disincentives it creates in relation to different groups of stakeholders.

Terminology

The focus of this report is on **'foreign languages'**, defined as 'those that originate from outside the British Isles'. However, it is recognised that many languages which fulfil this definition are also spoken by British nationals and residents in the UK, either as first languages or as part of a bilingual or plurilingual repertoire, and so in one sense are not strictly 'foreign'. It is common practice to refer to languages which appear in these contexts as **'community'** or **'heritage languages'** and these terms are also used in this report where relevant . However, it is used with care to refer to the context in which the language is used and learnt, rather than implying falsely that some languages are always 'foreign' and others fall into a different category of 'community languages'.

The term **'native speaker'** is also used. This refers to people whose first or dominant language is the 'foreign language' under consideration and who are likely to have received their education through the medium of this language. This may or may not include community languages speakers.

The other languages of the UK (Gaelic, Welsh, etc.) are not the main focus here, however the report recognises their contribution to the UK's overall language capacity and the fact that for many learners they may be tantamount to 'foreign' languages. Data on these languages are provided separately where available and relevant. In order to be inclusive of these languages, and sometimes also for the sake of brevity, the report may refer simply to **'language skills'** or **'language needs'**. This should be taken to refer to all languages other than English, with the main focus on foreign languages as defined above. The scope of this report does not cover English for Speakers of Other Languages, ancient languages, or communication skills in English.

Chapter two

Policy context

'Our perceived ambivalence towards foreign languages is seen increasingly as a limitation in a global marketplace where knowledge and customs count'

CBI/Ernst and Young[54]

A key priority for the current government has been and is to achieve economic growth. Its route map to 'Strong, sustainable and balanced growth' published in late 2010 identified international trade, export promotion and attracting investment into the UK as priorities for action[57] and its 2011 'Plan for Growth' highlighted the English language as 'an intrinsic strength' in achieving this.[58] A reception held for 200 of the world's leading economists, politicians and business leaders visiting London for the 2012 Olympic and Paralympic Games was designed to send a message that Britain was 'open for business'[59] yet our own leading business organisation has put on record that the UK is held back in its reputation as a global leader by its reputation for poor language skills,[60] and one of the only faux pas in the organisation of the London 2012 Games was related to poor management of foreign languages.[61]

Over a decade ago, the Nuffield Inquiry Report, which drew on extensive public consultation on the state of language learning in the UK, set out a picture of educational provision for languages which needed serious improvement if it was to meet the nation's economic, strategic, social and cultural responsibilities in the 21st century.[62] It called for a coherent strategy for languages, for language teaching to start in primary school, a wider range of languages to be taught, improvements in secondary education and a stronger role for languages post-16 and in further, higher and adult education.

In the 12 years since the publication of the report, a large number of educational policy initiatives at all levels and across the UK have either focused on languages specifically or have impacted on the position of languages in schools and universities. Yet, although there have been some positive developments, the major deficits outlined in the Nuffield report have actually worsened. Declines in the number of secondary school pupils studying languages have been the subject of public concern in all four education systems and the perception of the UK as a nation with poor language skills persists in both national discourse and in views expressed overseas.

Policymakers in England, Scotland, Wales and Northern Ireland share the dual ambitions of creating a better-educated workforce and providing more jobs and opportunities for young people. None would suggest that language learning did not have a role to play in this. But, as in other English-speaking nations, there

56 CBI/Ernst and Young, 'Winning Overseas: Boosting Business Export Performance', 2011. P. 27.
57 HM Treasury/BIS, *The Plan for Growth*, 2011. Its associated document, 'Trade and Investment for Growth', noted that language skills shortages had been a concern expressed by respondents to its previous White Paper consultation. (BIS, *Trade and Investment for Growth*, 2011.)
58 HM Treasury/BIS.
59 See http://www.huffingtonpost.co.uk/2012/07/26/government-tells-overseas_n_1707809.html.
60 CBI/Ernst and Young.
61 This related to the garbling of welcome messages in Arabic on signs displayed in the Westfield Stratford shopping centre. The gaffe was reported in national and international media, for example on the BBC at: http://www.bbc.co.uk/news/uk-england-london-18971686.
62 The Nuffield Foundation, *Languages: The Next Generation. Final Report and Recommendations of the Nuffield Languages Inquiry*, 2000.

is a tendency for perceptions of the value of other languages to be clouded by the perceived predominance of English.[63] Policy development risks being further hampered by the potential need for a very diverse range of languages including, many believe, those spoken by ethnic minority communities. There are also difficulties in understanding the true demand for language skills from employers. The policy contexts in which these challenges are being met vary enormously across the four parts of the UK. This chapter sets out the main policy developments over the last few years which have affected languages across England, Scotland, Wales and Northern Ireland.

2.1 Higher education

The challenges for languages in higher education were identified in a 2005 report for the Department for Education and Skills as:[64]

- declining national and regional capacity;
- the concentration of languages in the older universities;
- the narrow student class profile of language undergraduates.

Although these observations focused on England, the issues could have applied equally to the other parts of the UK also. The report successfully made the case to the Higher Education Funding Council for England (HEFCE) that languages should be designated strategically important and vulnerable subjects (SIVS)[65] and as a result additional public funding has been made available in England and Wales to address declining national capacity and stimulate demand for higher education language courses.[66] The 2005 report also highlighted the relevance of languages to universities' internationalisation agendas, calling into question the growing trend to call degrees 'international' when they contain no language component. To these concerns Professor Michael Worton, commissioned in 2009 to review the health of languages in English universities, added the lack of government 'joined up thinking' on languages. His key concerns were the declining pool of potential applicants for university language courses and the multiplicity of goals and purposes that language study in higher education was expected to fulfil. He particularly noted the role of University Language Centres in providing language courses for students of other disciplines. The report called on the sector to develop its own solutions rather than seeking ever increasing central investment. It recommended establishing a more comprehensive and compelling identity for languages, demonstrating the subjects' value within the internationalisation agenda to Vice Chancellors and university managers, and developing more programmes with a study abroad element.

These concerns remain the key issues for languages in higher education across the UK as different policy decisions on fees are starting to drive UK higher education down divergent paths: whilst those studying at English universities will pay fees of up to £9,000 a year, Scottish students studying at Scottish Universities will pay no fee, and Northern Ireland students studying at Northern Irish universities will pay only up to £3,465 in course fees. Welsh students, wherever they study in the UK, will in effect only pay £3,465 as they will receive

63 See, for example A. Liddicoat and others, *An Investigation of the State and Nature of Languages in Australian Schools*, 2007.
64 H. Footitt, *The National Languages Strategy in Higher Education*, 2005.
65 Defined as 'subjects identified by the government as strategically important where there is compelling evidence of a requirement for action to enable them to continue to be available at a level and in a manner that meets the national interest' HEFCE, *Strategically Important and Vulnerable Subjects. The HEFCE Advisory Group's 2010–11 Report*, 2011.
66 The Routes into Languages initiative in England and Wales, and the creation of 5 collaborative area studies research centres.

a 'top-up grant' to cover the balance between this and the actual cost of their course.[67] It is far from clear what impact this disparity will have on the demand to study languages at different UK universities, or the provision which they are able to offer. Some initial evidence is offered in Chapter 4 of this report.

The steep increase in fees in England has given rise to fears that a four-year course (which is the norm for languages degrees but also common where students of other disciplines take Erasmus programmes or a Year Abroad) may be off-putting to students and that demand for languages degree courses will therefore suffer. Universities are also concerned that fee arrangements for the Year Abroad will disadvantage them financially.[68] This issue has been partially resolved for the academic year 2013–14 but remains a concern for future years.[69] However, the squeeze on university finances is being felt throughout the UK and has resulted in actual or threatened closures in language departments in all four parts of the UK.[70] The fact that fee structures, and therefore patterns of application for university degrees across England, Scotland, Wales and Northern Ireland is starting to diverge means there is an increasing need to take into account what capacity there is to meet regional or local demand. A report on languages in Northern Ireland noted that 'Northern Ireland is a long way from being self-sufficient in producing linguists in the languages likely to be most needed by its businesses in future.'[71] In Scotland the viability of lesser taught languages has been a particular concern and the Scottish Parliament has been petitioned to ensure targeted support for 'strategically important and vulnerable' languages in the same way that this exists in England.[72]

Higher education has recently been affected by the tightening of policy on immigration and the controversy at London Metropolitan University concerning international students.[73] International students have been shown in the past to be eager consumers of optional language modules provided by Language Centres,[74] and, as a British Academy report has shown, are over-represented in postgraduate study and research that requires language skills.[75] Reductions in numbers of international students, whether as a result of immigration controls, fee increases or bad publicity may therefore have a disproportionate effect on the viability of language courses and language-related scholarship.

2.2 Secondary education

England, Northern Ireland and Wales have traditionally shared a similar curriculum structure although this is increasingly diverging since devolution. Languages are currently compulsory from 11–14 in all three, although in England and Northern Ireland they were previously compulsory until 16. In England, languages were made optional at KS4 (post-14) in 2004 in

67 UCAS website, accessed 17/9/12.
68 British Academy, Language Matters More and More. A Position Statement.
69 Department for Business Innovation and Skills, Government Response. Consultations on 1. Students at the Heart of the System. 2. A New Fit for Purpose Regulatory Framework for the Higher Education Sector, 2012.
70 E.g. Newport University, Queens University Belfast, Glasgow University, University of the West of England.
71 British Council, Language Rich Europe. Trends in Policies and Practices for Multilingualism in Europe, 2012.
72 Jan Culik, 'Targeted Funding for Lesser-taught Languages. Petition No. PE1395', 2011 www.scottish.parliament.uk/ResearchBriefingsAndFactsheets/Petitions briefings S4/PB11-1395.pdf.
73 UK Border Agency, 'Guidance for International Students Sponsored by London Metropolitan University' www.ukba.homeoffice.gov.uk/sitecontent/newsfragments/72-LMU-student-page.
74 Nick Byrne, 'How University Language Centres Are Offering Integrated and Non-integrated Language Modules', Association of University Language Centres, 2009 www.aulc.org/meetings/01-2009/limerick_2009.html> [accessed 1 January 2013]. See also John Canning, Survey of Non-specialist Language Learners, 2011 www.ucml.ac.uk/sites/default/files/Survey of non-specialist language learners 2011.pdf.This perhaps balances the notion that foreign nationals are only interested in learning English.
75 British Academy, Language Matters. The Supply of and Demand for UK Born and Educated Academic Researchers with Skills in Languages Other Than English, 2009.

a move to free up the curriculum in order to introduce a wider range of qualifications that pupils would find motivating and relevant. The study of languages was thus placed in competition with 'vocational' subjects and the numbers taking languages to GCSE started to fall dramatically – from 78% of the cohort sitting a GCSE in languages in 2001, to just 43% in 2011. A number of measures were put into place to attract more students to opt for languages, including the provision of high quality careers resources ('Languages Work'),[76] the development of a more varied menu of courses,[77] engagement with employers,[78] and with the university sector.[79] Of these only the universities initiative remains, funded through HEFCE and HEFCW. The Coalition Government's English Baccalaureate was intended to strengthen the status of 'academic' subjects including languages by offering a 'new award' for any student achieving A*– C grades at GCSE in English, maths, science, a humanities subject and a modern or ancient language. It was introduced – retrospectively and to much controversy – as a performance measure for schools from January 2011. Designed to encourage both schools and pupils to focus on traditional academic subjects, there is already evidence that the English Baccalaureate is resulting in schools channelling students into these subjects.[80] However language associations have noted that the measure may risk exacerbating the social divide in languages as there will be no incentive to provide language teaching for those pupils thought unlikely to achieve good passes in the full range of subjects that make up the English Baccalaureate. This may reinforce rather than challenge attitudes that languages are a 'hard' subject or not particularly relevant to many students' lives today. Linked to the English Baccalaureate, the Department for Education ran a consultation on proposals to replace GCSEs with new exams leading to 'English Baccalaureate certificates'. Such a measure may further improve the status of languages in the curriculum and indeed may be intended to obviate the need to reinstate languages as a compulsory subject in KS4. The thinking may be that this is no longer necessary because a considerable majority of secondary schools now have academy status, which exempts them from having to adhere to the national curriculum.

In Northern Ireland, following the example of England, languages were made optional in the KS4 curriculum in 2007. This resulted in a 19% drop in numbers taking French, German and Spanish over 4 years. In 2006 the Department of Education commissioned the development of a Comprehensive Languages Strategy for Northern Ireland, and after much delay this was finally published in late 2012.[81] It calls for a strengthening of languages within the secondary curriculum and for the take up of languages post-14 to be increased.

In Wales foreign language learning has never been compulsory at KS4. This means that GCSE entries for foreign languages have always represented a lower proportion of the cohort than in England. However they too have been dropping significantly in recent years. The reasons why it has proved difficult to halt and reverse the decline in Wales are broadly similar to those in England and Northern Ireland: lack of compulsion, an increasing range of subjects on offer in KS4 and Sixth Form, an assessment system which rewards grades

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76 Although this initiative is no longer proactive, the website is still available at www.languageswork.org.uk.

77 A key recommendation of the 'Dearing Review'. Department for Education and Skills, *Languages Review*, 2007.

78 An initiative known as Business Language Champions.

79 Routes into Languages www.routesintolanguages.ac.uk.

80 Teresa Tinsley and Youping Han, *Language Learning in Secondary Schools in England. Findings from the 2011. Language Trends Survey*, 14 March 2012, www.cfbt.com/evidenceforeducation/our_research/evidence_for_government/national_policy_reforms/language_trends_survey.aspx [accessed 18 October 2012]., S. Clemens, *The English Baccalaureate and GCSE Choices. DfE Research Brief*, 2011.

81 John H. Gillespie, David Johnston and Ailbhe O Corráin, *Languages for the Future. Northern Ireland Languages Stategy*, 2012.

rather than subjects and a virtual consensus among pupils, teachers and parents that languages are 'harder' than other subjects. The situation has become exacerbated since the introduction of 14–19 Learning Pathways which have brought a plethora of new choices into the Welsh curriculum from KS4 onwards. The Welsh Assembly was forced to hold an Inquiry into the unintended consequences of this measure,[82] which it was alleged had precipitated the decline in 'traditional subjects' such as languages. However the Minister's view was that the decline was not caused by the measure as the drop-out from languages was also happening elsewhere in the UK.

The 2010 policy document *Making Languages Count* set out the Welsh Assembly Government's plan to improve the teaching and learning of 'modern foreign languages'.[83] This focused firstly on improving the quality of the experience in KS3 and secondly on action in the 14–19 phase. 14–19 actions included supporting the development of alternative qualifications to GCSE, business-education links focused on languages, and languages within a new qualification known as the Welsh Baccalaureate. This is a qualification for 14–19 year olds which can be taken at 3 levels, combining personal development skills with existing qualifications in order to provide a better balance of skills and knowledge valued by employers. All students must complete a language module of 20 hours within the 'Wales, Europe and the World' strand. CILT Cymru, in partnership with its parent company WJEC, has developed language modules which are currently being piloted in schools and FE colleges delivering the Welsh Baccalaureate. These modules are flexible and self-standing and may be used in a variety of contexts.

In Wales as in other parts of the UK, the promotion of STEM (Science, Technology, Engineering and Maths) subjects in schools and universities has been a priority. The campaign for STEM across Wales was based on evidence that: the proportion of learners in Wales taking Science and Maths A-level is below that of the rest of the UK; mismatch between supply and demand in STEM skills; negative perceptions of STEM subjects, and a gender imbalance. All these arguments apply equally to languages. The gender imbalance is particularly acute for French (skewed in the opposite direction to STEM subjects) – only 29% of French A-level entries in Wales in 2011 were boys. The Welsh Education Minister, Leighton Andrews, has declared both STEM subjects and modern foreign languages to be 'Subjects of Broader Importance to Wales' and a collaborative campaign is under way in schools to promote the study of languages alongside science subjects as a way of boosting employment prospects. The other parts of the UK will have a great deal to learn from this campaign.

In Scotland, 'Languages for All' guidelines published in 1989 created 'compulsion by consensus' for all pupils to study at least one modern language for four years of secondary schooling.[84] However by 2001 this had been reduced to a notion of 'entitlement' only and this had led to a declining number of schools where languages are compulsory up to the fourth year of secondary education.[85,86] Scotland is in the third year of implementing a new curriculum, Curriculum for Excellence, which treats learning holistically rather than as a series of separate

82 National Assembly for Wales, *Enquiry into the Implementation of the Learning and Skills (Wales) Measure 2009*, 2012.
83 Welsh Assembly Government and Young Wales, *Making Languages Count*, 2010.
84 See Doreen Grove, *Talking the Talk, so that Scotland can Walk the Walk. The Economic Case for Improving Language Skills in the Scottish Workforce*, 2011.
85 SCILT, *National Survey of Modern Language Provision in Scottish Schools 2011 Part 2: Secondary Schools*, 2012, pp. 1–23.
86 Scottish Government, *Citizens of a Multilingual World. Scottish Executive Response*, 2001 www.scotland.gov.uk/Resource/Doc/158315/0042875.pdf.

subjects. The Curriculum for Excellence places foreign language learning within the wider area of languages and literacy, which includes English, Gaelic and classical languages. A Modern Languages Excellence Group formed by the Scottish Government has published a report setting out how the study of modern foreign languages fits within Curriculum for Excellence, and what needs to happen in order to secure, promote and enhance the provision of modern languages in Scotland.[87] Curriculum for Excellence does not specify inputs, but focuses rather on outputs in terms of the level children should have reached at the end of each level. Under current guidelines children are expected to reach level A1 on Common European Framework of Reference in their first foreign language by the end of primary school and A2 after the first three years of secondary.

The fact that within Curriculum for Excellence foreign languages have to share a place with other language and literacy-related subjects has been seen as potentially weakening their position, and there is evidence that pupils are giving up languages even before the third year of secondary education.[88] A survey in 2011 of Scottish Local Authorities found that more than half had at least one secondary school where languages were not compulsory with schools interpreting a large proportion of the 'entitlement' to language learning as having been met in primary school.[89] There has also been concern expressed about a rapid drop in the number of Foreign Language Assistants employed in Scottish schools, which dropped from 285 in 2005 to 59 in 2011.[90]

At post-16 level, the Scottish Baccalaureate has been created as a way of bridging the gap between school and university and providing skills for learning, life and work. The Scottish Languages Baccalaureate was one of the first two Scottish Baccalaureates introduced, in 2009. It requires students to take two different modern or classical languages courses, at least one of which must be at Advanced Higher level, plus English (or Gàildlhig) and an interdisciplinary project, conceived as a practical assignment prepared outside the classroom. The aim of this is to provide opportunities for more applied learning and to show the relevance of acquiring language skills within 'the wider world of learning and work'.

Apart from the Scottish Baccalaureate, policy development on languages across the different parts of the UK has almost exclusively been at lower secondary level, with very little debate focusing on measures which might boost take up post-16. In general, uptake of languages for A-levels and Highers has remained much more stable, although languages represent a decreasing share of overall entries and some languages have suffered notable declines (see Chapter 4 for figures and a discussion of this). It has perhaps been over-optimistically assumed that uptake at this level, and through into university, would increase naturally if the pool of younger students taking languages could be increased. The Russell Group has contributed to the debate by publishing a guide for students on A-level choices which are helpful in facilitating entry to competitive university courses.[91] Languages are among these 'facilitating subjects'.

2.3 Languages in primary schools

The early introduction of language learning has been favoured by policymakers as a solution to low take up and achievement by older pupils. Scotland was the first

87 SCILT, 'Modern Languages Excellence Report', 2011 www.scilt.org.uk/Portals/24/Library/research/ FinalMLExcellencereport22Feb.pdf [accessed 1 January 2013].
88 SCILT, 2012.
89 The survey was reported in TESS, 'Poor language skills put Scots at disadvantage', 25/3/2011.
90 'Backlash from diplomats over language cuts', *Scotland on Sunday*, 4/12/11.
91 Russell Group, *Informed Choices. A Russell Group Guide to Making Decisions About Post 16 Education.*, 2012.

UK nation to introduce language teaching across the primary school sector. The initiative dates from the early 1990s and was well supported by training for existing primary school teachers, focusing mainly on the top two years of primary school – 10 to 12 year olds. Although the initiative had foreseen a range of languages being taught, French was always the dominant language and has become more so over time.[92] There has recently been concern expressed that primary teachers are not properly equipped to teach a foreign language and that local authorities are cutting training programmes because funding is no longer ring-fenced.[93] However, the SNP government has adopted the European policy ambition of 'mother tongue plus two languages' and has made a manifesto commitment to introducing this model over the course of two parliaments. A recent Languages Working Group document has set out a series of recommendations and case studies have been commissioned.[94] The proposal is that the second language (which may include community languages and Gaelic as well as 'foreign' languages) is to be offered from the first year of primary school with the third being introduced no later than the fifth year of primary school. The document strongly encourages interdisciplinary working and the development of a wider range of languages, and prioritises the training of teachers. The Scottish Government has yet to respond to the Working Group's recommendations; however it has welcomed the recommendation that language learning should start from the first year of primary school.

In England, the development of language teaching in primary schools was a key component of the 2002 National Languages Strategy – and implementation has been rapid. By 2007, 56% of primary schools were already offering a language, up from about 20–25% at the beginning of the decade. This would rise to 92% by 2010, in the expectation that it would become a statutory subject. This expectation was not realised in advance of the 2010 general election; however after two years of policy review by the Coalition Government, languages are now on track to become part of the primary national curriculum from 2014.[95]

Modern Languages are not part of the Northern Ireland primary curriculum, which was revised in 2007. This was despite a positive evaluation of pilot projects which took place between 2005 and 2007. These involved 21 schools teaching mainly French, with some Spanish. Despite the lack of curricular requirement, a survey in 2007 found that 57% of responding primary schools were making some provision for the teaching of a second language, although in over half of cases this was in the form of extra-curricular activity. The current curriculum encourages the teaching of modern languages within the area of 'Language and Literacy' and supporting also the areas of 'The World Around Us' and 'Personal Development and Mutual Understanding'.[96] Guidance has been published to help teachers develop and integrate this, including online resources for French, German, Irish and Spanish. From 2008 the Department for Education for Northern Ireland funded a Primary Languages Programme which provided peripatetic teachers in Spanish or Irish to work alongside existing Key Stage 1 primary school classroom teachers (Polish was also included from 2009). The scheme was criticised for excluding French, which is the most widely taught language in secondary education. By 2009, 247 schools had participated in Spanish and 76 in Irish.[97] The recently-published Northern Ireland Languages Strategy calls for the consolidation and extension of this programme.[98]

92 SCILT, 'Survey of Modern Language Provision 2011 Part 1: Scottish Primary Schools', 2012, 1–24.
93 'Pupils risk being lost in translation', *Edinburgh Evening News* 16/4/2010.
94 Scottish Government Languages Working Group, *Language Learning in Scotland A 1 + 2 Approach Scottish Government Languages Working Group Report and Recommendations*, 2012, pp. 1–50.
95 Department for Education, *Making Foreign Languages Compulsory at Key Stage 2 Consultation Document*, 2012.
96 'Northern Ireland Curriculum > Key Stages 1 and 2 > Areas of Learning > Languages and Literacy' www.nicurriculum.org.uk/key_stages_1_and_2/areas_of_learning/language_and_literacy/ [accessed 11 January 2013].
97 Noel Purdy, Laurence Siberry and George Beale, 'Primary Languages in Northern Ireland: Too Little, Too Late?', *Language Learning Journal*, 38 (2010).
98 Gillespie, Johnston and O Corráin.

Wales too has seen some successful pilot projects including one 6-year project that was very favourably evaluated.[99] The Welsh Conservative party and Plaid Cymru are now both committed to introducing languages as a compulsory subject in primary schools in Wales.[100]

2.4 Further and adult education

There has been very little recent policy development in the area of languages in vocational courses. A UK-wide survey of further education colleges has showed that very few attempts are being made in the sector to offer language courses to those studying for vocational qualifications.[101]

Another report, using data from the Scottish Qualifications Authority, warned that modern language provision in the Scottish further education sector was on the verge of total collapse.[102]

In Wales, measures contained within *Making Languages Count* (see 2.2 above) are intended to boost work-related language learning. These include an initiative to boost take up of work experience in EU countries through the Leonardo strand of the Lifelong Learning Programme.

In England, there were a number of initiatives to develop a place for language learning within the 14–19 Diplomas which were the focus of curricular reform during mid to late 2000s. These included the Diploma in Languages and International Communication (DLIC), the development of which provided a fertile forum for exchange between schools, colleges, universities and employers. It tackled some key questions such as how to make the content of language learning more relevant to both employers and students, how to develop learner independence, cater for a wider range of languages and raise aspiration, enjoyment and achievement. However, the 14–19 Diplomas did not form part of the Coalition Government's education policy and the DLIC was never brought to fruition. The government instead commissioned a review of vocational education which highlighted the mismatch between labour market opportunities for young people and vocational education provision.[103] This counselled against channelling young people too early into low level vocational courses which it found had very little value in the labour market, and advised focusing on general education up to age 16. The Government has therefore used the performance table system to disincentivise schools from offering qualifications regarded as less rigorous. These include alternative language qualifications such as Asset Languages and NVQ language units – qualifications which offer flexibility for providing a language element alongside vocational courses and have also found favour with schools dissatisfied with the GCSE or looking for more relevant and flexible options for pupils. Their downgrading has already had an impact on schools' offer of language courses as alternatives to GCSE which are more vocationally-oriented.[104] Teachers report that this has had a negative effect on provision for groups of pupils who found these courses more motivating and relevant than GCSE.[105]

99 Welsh Assembly Government, *Evaluation of the Key Stage 2 Modern Foreign Languages Pilot Projects Being Delivered in Wales from 2003–2006*, 2006, pp. 1–59.
100 Welsh Conservatives, 'Movement to Inspire Love of Language | Welsh', 2012 www.welshconservatives.com/news/movement-inspire-love-language [accessed 1 January 2013]. Plaid Cymru, 'Revolutionise Language Teaching in Schools – Plaid Leader', 2012 www.english.plaidcymru.org/news/2012/08/10/revolutionize-the-language-teaching-in-schools-plaid-leader/ [accessed 1 January 2013].
101 CfBT and others, *Language Learning in the FE Sector. A Survey with FE Colleges in 2011*, 2011.
102 'La Grande Illusion: Why Scottish further education has failed to grasp the potential of modern languages', *Scottish Languages Review*, Issue 23, Spring 2011, Hannah Doughty, University of Strathclyde.
103 A. Wolf, 'Review of Vocational Education. The Wolf Report', *Department for Education*, 2011 www.education.gov.uk/publications/eOrderingDownload/The Wolf Report.pdf [accessed 17 October 2012].
104 Tinsley and Han.
105 Tinsley and Han.

The Government has also supported the development of a new type of institution in England, University Technical Colleges (UTCs) which provide integrated technical and academic education for 14–19 year olds. These colleges teach technical subjects alongside GCSEs including a foreign language. They are supported by a local university and closely involve employers. Eighteen such colleges have already been approved, and the aim is for 24. The Black Country UTC is an interesting case, specialising in Engineering and making German compulsory in Key Stage 4.[106] These new institutions and their supporting universities have the potential to develop new models of excellence in language learning linked to vocational subjects.

2.5 Welsh, Irish, Gaelic and Scots

The role of indigenous UK languages other than English, although outside the main scope of this report, is important for any discussion of arrangements for foreign language learning. In Wales, Welsh is compulsory for all pupils, whether as a first or second language and around 20% of primary-age pupils and a slightly smaller proportion in secondary, receive their education through the medium of Welsh.[107] This means that many more Welsh pupils are learning another language in addition to their mother tongue (whether that is Welsh or English) than would appear to be the case if we were to focus solely on foreign language statistics. However, if we were to roll up these figures with those for foreign languages, this would present a very skewed picture of the situation in Wales. Because Wales is already a bilingual country, for the purposes of comparisons with other parts of the UK it is the figures for foreign language learning which concern us most; bilingual speakers' heightened facility for learning additional languages notwithstanding.

In Northern Ireland and Scotland, as in Wales, some pupils are educated through the medium of the indigenous language and there are different exams for pupils who are fluent in Irish or Scottish Gaelic and for those learning the respective language as a curriculum subject. However in both cases, numbers are much smaller and do not skew the figures unduly. Figures are presented separately where relevant. Since 2006, Irish has been recognised as fulfilling the compulsory language requirement offered by schools under the Northern Ireland Curriculum.

2.6 Community languages

The languages spoken by people living in the UK whose background is from overseas are highly relevant to the focus of this report. Although most teaching provision for the UK's ethnic minority community languages takes place in the voluntary sector[108] (in classes organised by the community with or without support from local authorities and schools) policy interest in the languages spoken by the UK's ethnic minority communities started to grow from the late 1990s. In 1998 an agreement was brokered between examination boards to make GCSEs available for 'small entry languages' and the Teacher Training Agency started to look at ways of improving teacher training for community languages and access to Qualified Teacher Status for teachers. The publication of the Nuffield Inquiry highlighted community languages as a linguistic resource to be developed and drawn upon more systematically, and the finding revealed in the 2000 publication 'Multilingual Capital – the languages of London's

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106 http://www.blackcountryutc.co.uk/curriculum/
107 British Council. op. cit.
108 CILT, SCILT and CILT Cyrmu, *Community Language Learning in England, Wales and Scotland*, 2005.

schoolchildren' that over 300 languages were in use in London, has been extensively cited to illustrate London's global connectedness and diversity.[109] As a result of the 2002 National Languages Strategy in England, new 'Asset Languages' exams were introduced in 25 languages. This represented a wider range of languages than were available at GCSE and included such languages as Somali, Yoruba and Tamil which have become increasingly represented amongst schoolchildren as immigration patterns have changed. However, this range of languages is now to be discontinued.

Between 2008 and 2010 the Department for Education and Skills funded 'Our Languages' (a project delivered by CILT and partner organisations) which brokered partnerships between mainstream and community schools, boosted training opportunities, dialogue and research, and produced a wide range of resources. In 2008 Ofsted published a report *Every language matters* calling on the Training and Development Agency for schools (TDA) to make initial teacher training in languages other than French, German and Spanish more widely available and accessible to communities. In the same year, the Routes into Languages initiative published a report on *Community Languages in Higher Education* (2008), noting the dearth of provision for community languages (for example, that there were no degree courses at that time in the four most widely spoken community languages: Urdu, Cantonese, Panjabi and Bengali) and the barriers to professional training in community languages not only for teaching but also for translation and interpreting.

2.7 Economic and skills strategies

The contribution of language skills to the economy has frequently been overlooked in policy documents on enterprise and skills. They were not mentioned in the highly influential Leitch Review of Skills which established the framework for demand-led skills planning and a focus on economically valuable skills.[110] Lord Sainsbury's 2007 review of science and innovation policies *The Race to the Top* focused on the international context for science and innovation in the face of globalisation and the need to ensure Britain's competitiveness with respect to emerging economies.[111] However it focused entirely on STEM subjects and failed to mention the desirability of combining these with language and cultural expertise. Similarly, the Welsh Government Economic Renewal strategy sees improving Wales' international profile as critical, and calls for improvements in skills that lead to economic growth, especially STEM subjects, but without mentioning foreign languages.[112]

The implementation of demand-led skills and training, and the way that that demand has been identified, has not always been favourable to languages, as will be discussed later in this report. This means that there has been relatively little policy development in the area of language skills for working life. National Occupational Standards – valid across the UK – exist for languages, for interpreting and translation, and for intercultural working. The UK Commission for Employment and Skills ensures that these are regularly reviewed. The UKTI has been active in providing support to exporting businesses on language matters through its Passport to Export scheme[113] and offers companies a review of their export communications including written and spoken communications,

109 P. Baker and John Eversley, *Multilingual Capital: The Languages of London's Schoolchildren and Their Relevance to Economic, Social and Educational Policies* (London: Battlebridge, 2000).
110 Leitch, *Prosperity for All in the Global Economy – World Class Skills. Leitch Review of Skills* (HMSO, 2006).
111 Lord Sainsbury of Turville, *The Race to the Top: A Review of Government's Science and Innovation Policies*, 2007.
112 Welsh Assembly Government, 'Economic Renewal: a New Direction', 2010.
113 www.ukti.gov.uk/export/howwehelp/passporttoexport.html.

language training and the use of specialist translation and interpreting services.[114] Unfortunately, no evaluation or review of this work was available to feed into the *State of the Nation* report.

2.8 Policy development at European level

The European Commission and the Council of Europe have been major players in encouraging the development of policies and practices to support multilingualism and there is not space here to do justice to their multiple contributions over several decades. Although the driver for the European Commission has been economic factors and the role of languages in enabling European citizens to take advantage of being able to live, work or study in another member state, its main focus has been on languages in education systems, promoting an earlier starting age and supporting transnational cooperation through its funding programmes. More recently it has started to focus more directly on the needs of employers and on making the case for languages to businesses, especially SMEs (small and medium-sized enterprises) with export potential.

The Council of Europe's main concerns are democratic citizenship and human rights and it has developed a number of tools to support the development of 'plurilingual' educational policies. The term 'plurilingual' is used here to refer to the totality of linguistic competences within an individual, as distinct from 'multilingual' to refer to societies or nations which may in fact contain large numbers of monolingual individuals. The Council of Europe's 'Common European Framework of Reference' for languages (2001) is widely used as a resource for enabling greater coherence in language policies and practices across Europe.[115]

2.9 Summary of key issues

Although the policy contexts are very different, concern about the fragility of language provision and the difficulties of engaging all four key groups of stakeholders: learners, employers, course providers and government, are common throughout the UK. The key issues for monitoring and the development of further policy solutions are:

- The level of participation in language learning in educational stages where the subject is not compulsory
- Which languages are being taught – both the range on offer and the specific languages taught
- The social balance in language learning, including the socio-economic status and gender of the learners
- The integration of language courses within vocationally-oriented courses
- The geographical spread of language learning and disparities between the four parts of the UK
- The contribution of language skills to economic development and the challenge of identifying employer demand.

This report will explore these issues in depth in the light of the latest evidence on both supply and demand.

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114 www.ukti.gov.uk/export/howwehelp/exportcommunicationsreview.html.
115 Council of Europe, 'The Common European Framework of Reference for Languages' www.coe.int/T/DG4/linguistic/CADRE_EN.asp [accessed 21 October 2012].

Chapter three

Demand for language skills

This chapter looks at the overall extent of demand for language skills in the UK and the issues arising. It explores:

- the demand for language skills as identified by employers
- the drivers of demand within and beyond the UK
- which languages are currently most in demand and which are likely to emerge in the near future
- language requirements in relation to specific industries and job types within different sectors
- the geographical spread of demand for language skills within the UK.

3.1 What is the extent of the demand for language skills?

Previous compilations of Labour Market Intelligence on languages[116] (and intercultural skills) have distinguished between demand in language-specific professions (interpreting, translation and teaching) and other occupations in which language skills are required. The latter include a very wide spectrum of jobs. This section will consider:

- Demand which is directly articulated by employers
- Jobs for which languages add value, without being an explicit requirement
- Latent and future demand for languages.

3.1.1 Employer surveys

A strong indication of the **extent** of the need for competence in foreign languages comes from the CBI's annual employer surveys.[117] The 2012 survey, based on responses from 542 companies, found that nearly three quarters of UK private sector employers see a need – or at least a benefit in having – foreign language skills in their business and that only 28% said they had no need at all for language skills. This confirmed the previous year's findings, based on a similar number of responses, when 27% said they had no need for language skills. However, as can be seen from the chart reproduced below, only 5% of the respondents said that the ability of at least some members of staff to speak one or more foreign languages was an 'essential core competence'. For others, language competence was seen as a positive attribute – for the individual as well as for the company – but not necessarily essential.

116 Anne Marie Graham, 'Labour Market Intelligence: Languages and Intercultural Working'. Graham, 2012, Mulkerne, S. and Graham, A.M., 'Labour Market Intelligence on Languages and Intercultural Skills in Higher Education', *University Council of Modern Languages*, 2011 <www.ucml.ac.uk/sites/default/files/shapingthefuture/101/17 – Anne Marie Graham emp resource template_0.pdf> [accessed 15 October 2012].
117 CBI/Pearson, 'Learning to Grow: What Employers Need from Education and Skills', 2012.
CBI/EDI, *Building for Growth: Business Priorities for Education and Skills*, 2011.
CBI/EDI, *Ready to Grow: Business Priorities for Education and Skills*, 2010.
CBI, *Emerging Stronger: the Value of Education and Skills in Turbulent Times. Education and Skills Survey*, 2009.

Figure 5: Need for employees who can speak foreign languages
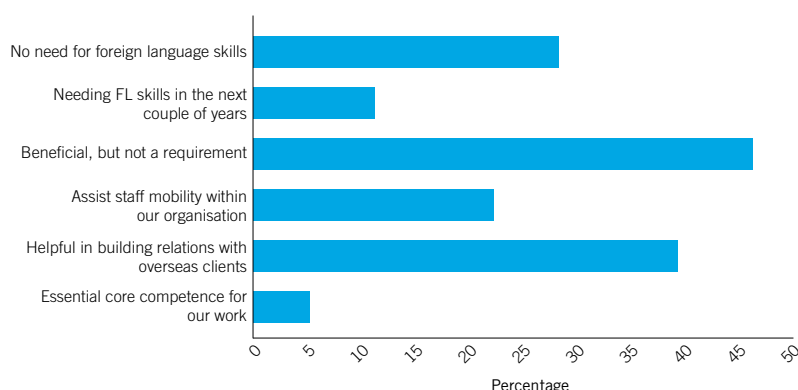
Source: CBI/Pearson Education and Skills Survey 2012.

The biennial National Employer Skills Surveys carried out by the UK Commission for Employment and Skills (UKCES) provide two types of information in relation to demand for foreign language skills: a) the extent of vacancies which are hard to fill as a result of skills shortages, and b) deficiencies perceived by employers among the existing workforce. The most recent survey, conducted in 2011 and covering the whole of the UK, attributes 16% of the total number of skills shortage vacancies and 9% of skills deficiencies among existing staff to shortages of foreign language skills.[118] Whilst foreign language skills come bottom of the table of cross-sector skills causing skill-shortage vacancies, the deficits are still significant. This is particularly the case in certain industries and at certain levels in the workforce.[119] Comparable data from previous years is only available for England where foreign language deficits accounted for 13% of skills shortage vacancies in 2005, 12% in 2007, and 18% in 2009. There is also evidence that, in England at least, employers are becoming more aware of their employees' deficiencies in foreign languages: while 9% of English employers perceived this as a gap in their existing workforce in 2005 and 2007 – up from 7% in 2003 – in 2009 this had increased to 13%. Lack of data means it is not clear whether this awareness is shared in the rest of the UK – the figure for 2011 which refers to the UK as a whole is just 9%. Scotland's Skills in Scotland 2010 report did not include foreign languages as a category of skills deficit. A Federation of Small Businesses survey in 2006 noted that foreign language skills shortages in Northern Ireland were more serious than in other UK regions, but without supplying figures.

3.1.2 Types of jobs involving languages

In the last two years, much progress has been made in developing methodologies for identifying employer demand for language skills via the analysis of advertisements for jobs with languages.[120] Mulkerne and Graham's 2011 study found that between 1% and 4% of all positions advertised during the period of their research specifically required language skills. The authors felt that this proportion of vacancies was on a par with the percentage of higher education students studying a language. However, it was noted that there were many positions advertised for which languages, whilst not essential, were desirable or seen as adding value to candidates' applications. Graham's 2012 research explicitly captured these and found they made up 9% of total vacancies mentioning languages.

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118 Ben Davies and others, *UK Commission's Employer Skills Survey 2011: UK Results,* 2012.p. 60. There was a separate category for shortages of Welsh language skills, for Welsh employers only.
119 See sections 3.3 and 3.4 of this report.
120 Anne Marie Graham, 'Labour Market Intelligence for Languages – a Picture of the Jobs Market, Summer 2012'. Mulkerne, S. and Graham, A.M. op. cit.

Both the 2011 and the 2012 research showed that only a small proportion of jobs with languages are for specialist linguist positions. In 2011, 2% were categorised as Translation and 4% as Teaching. In the 2012 research, which used slightly different categories, around 5% of language jobs mentioned specialist linguist functions such as 'translator' or 'interpreter'. Whilst many of these were in the languages service industry, there were also in-house specialist linguist roles in other sectors such as the games industry or the legal sector. Around 3% of the language vacancies were for language teachers or tutors. As can be seen in Figure 6, the vast majority of roles requiring language skills were for positions which required language skills alongside or as part of another job function, particularly sales and customer service roles. This reflects findings from universities' research on graduate destinations which shows that language graduates enter a wide variety of job fields.[121]

Figure 6: Terms commonly used in advertisements for jobs with languages
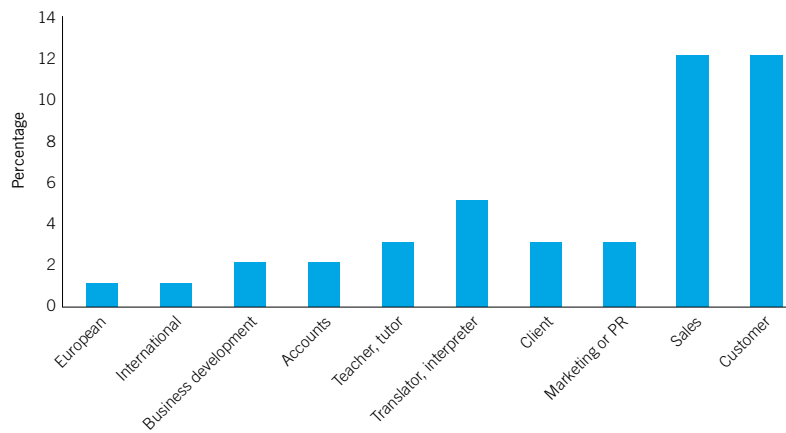
Source: Graham, 2012.

It is possible therefore to identify three levels of demand for languages:

Figure 7: The structure of the jobs market for languages (interim version)

A: Specialist linguist roles (translator, interpreter, teacher)

B: Jobs requiring languages alongside other (non-linguistic) professional skills

C: Jobs for which languages are a desirable extra
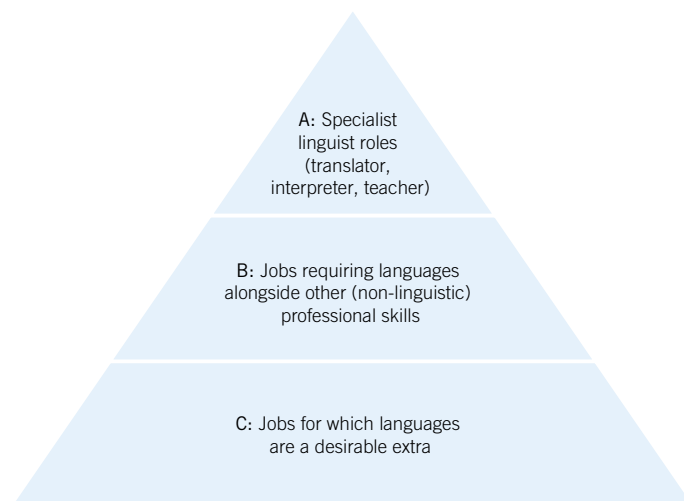
121 See, for example: University of Kent, 'What Do Modern Languages Graduates Do?' www.kent.ac.uk/careers/ modernlanguages.htm#WHATDO.

According to Graham, only around 9% of jobs explicitly advertising for languageskills would fall into category C. However, there is a mismatch between the findings of this relatively small-scale study and those of the CBI survey quoted above, in which 72% of employers acknowledge the benefits of language skills within their company. The reason for this discrepancy is likely to be that in the vast majority of cases, explicit mention of language skills does not find its way into job advertisements, even though it may be regarded as an advantage at interview.

In new research carried out for this report, Tinsley shows that demand for language skills is present in a range of public sector contexts, and, indeed the voluntary sector, as well as in private enterprise.[122] Graham's research finds that between 1% and 2% of vacancies with languages are in the private sector, and just over 2% in the charity sector. The specialist language professions – interpreting, translation and teaching – feature strongly in public sector demand for language skills.

3.1.3 UK employers' perceptions of the value of language skills compared to international counterparts

The demand which is articulated for language skills clearly depends on the extent to which employers perceive them to be important and there is evidence that UK employers are less likely to value language skills than their counterparts abroad. In a pan-European survey of employers of graduates in more than 30 countries,[123] only 22% of UK employers said they were 'very important' or 'rather important' compared to an average of 57% across all countries surveyed. Only 4% said it was important that future graduates should have language skills, compared to 31% across all countries. However, as can be seen in Figure 8, UK employers were the most enthusiastic recruiters of graduates from outside the EU – with 49.5% recruiting from outside Europe, compared to an average of only 21.5% across all countries surveyed. The UK was also among the top countries for recruiting graduates from other European countries – 56.8% of UK employers recruit from other countries within the EU, compared to 30.2% across all countries. Employers in Luxembourg, Ireland and Cyprus are the only ones who are more likely to recruit graduates from other European countries. However, when asked 'from which educational fields do you mostly recruit higher education graduates?' UK employers were more likely to recruit language graduates than any other country (14.2% compared to 8.2% across all countries in the survey). This is perhaps because in the UK graduates in other disciplines are less likely to have language skills than their counterparts in other countries. Taken together, these findings indicate that demand for language skills in the UK may be being disguised by the propensity to recruit foreign nationals who bring these skills into companies along with other attributes valued by employers. In other words, language skills are required implicitly rather than explicitly desired, and most commonly as part of a package of other skills and attributes rather than a main priority. When asked their reasons for recruiting graduates from abroad, UK employers' responses exceeded the average across all countries **by more than 20 percentage points** on each of the following answers:

- To recruit the very best talent available
- Insufficient candidates in their country with the 'right skills for the job'
- Graduates from other countries have a strong work ethic.

122 Tinsley, 2012. op. cit.
123 Eurobarometer and European Commission, *Employers' Perception of Graduate Employability Analytical Report*, 2010.

This highlights the extent of the challenge for UK graduates in a highly competitive jobs market.

The findings are also of interest from the point of view of UK nationals with language skills wishing to find employment in other European countries. The very high levels of value attached to language skills by employers in countries such as Germany (70%), Italy (77%) or Sweden (81%) are an indicator of the potential opportunities available for English speakers who can also offer other languages.

Figure 8: European employers' perceptions of graduate employability
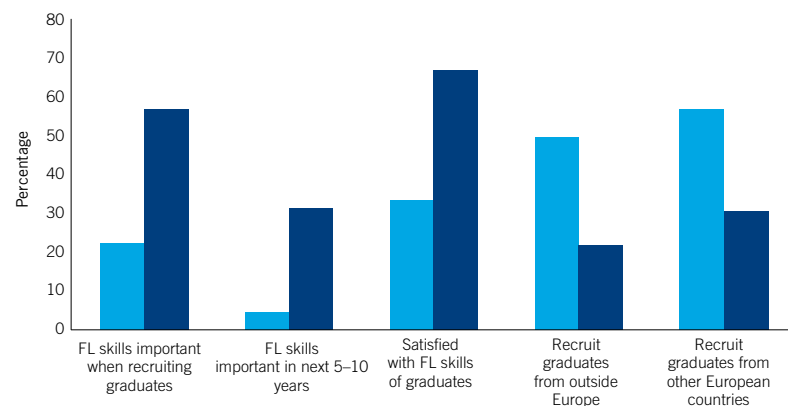
Source: Flash Eurobarometer No. 304, European Commission 2011.

These findings echo those from a 2006 study of language skills management in major companies that UK employers were less 'language aware' than their French or German counterparts and less willing to accommodate other languages.[124]

3.1.4 Employer attitudes towards language skills
Language skills regularly appear among lists of generic skills employers are asked if they are satisfied with – see discussion above in relation to the National Employer Skills Surveys. CBI Education and Skills surveys have found a very high level of dissatisfaction with school/college leavers' language skills over the last three successive years – 71% dissatisfied in 2010, rising to 76% in 2011 and 68% in 2012. In 2010 and 2011 language skills were – of the generic skills listed which included such skills as use of IT, teamworking, numeracy etc. – those which elicited the most dissatisfaction, apart from 2012 when employers were slightly more dissatisfied with 'business and customer awareness'. In 2009 the question was posed slightly differently, specifically with regard to graduates' employability skills but, once again, language skills appeared at the bottom of the table for satisfaction with 41% of respondents dissatisfied.[125]

Previously, in 2004, a survey of members of the Federation of Small Businesses had put foreign language skills at the bottom of the table for satisfaction but with quite different scoring.[126] Whilst only 6% of respondents were satisfied (or very satisfied) with the language skills of their current employees, the explicit level of *dissatisfaction* was only 11%. The vast majority of respondents were either 'neutral' (22%) or said foreign language skills were 'not relevant' (34%).

124 CILT, *Talking Sense: a Research Study of Language Skills Management in Major Companies*, 2006.
125 CBI surveys, op. cit.
126 Federation of Small Businesses, *Lifting the Barriers to Growth in UK Small Businesses*, 2004.

The same pattern emerged in the Eurobarometer employer survey where just 6% of UK respondents said they were dissatisfied with graduate recruits' language skills, but the majority (62%) said they did not know, or that the question was not relevant to them.

The picture that emerges therefore is not simply one of the poor quality of supply but of indifference or ignorance on the part of employers towards language skills.

An analysis of findings from a survey of 2,700 UK businesses by Regus linked low demand for language skills to poor supply.[127] It found that only 35% of businesses require staff working as expatriates overseas to be fluent in the local language, and that 57% use local managers to staff foreign operations – because, says the report, they are unable to find a sufficient pool of multilingual British candidates on which to draw. This behaviour then reinforces the belief that language fluency is not critical to overseas success. These findings show the limitations of relying solely on evidence of demand for language skills which is articulated directly in employer surveys or job advertisements.

3.1.5 Limitations of employer surveys

Doughty has argued that many employer surveys which set out to gather labour market intelligence on language skills are based on monolingual premises and disguise the actual use of and need for language skills in the UK labour market.[128] The research followed up Scottish employers who said that they had no need for language skills and revealed the many ways in which they circumvent the need to use foreign languages – for example, by not exporting at all or by exporting only to English-speaking countries or countries where they can find business partners who speak English. There is also evidence from elsewhere of a preference for circumventing, rather than addressing, language skills issues. One example of such behaviour was described in a study of language barriers in the leisure industry in the Coventry and Warwickshire area: the authors note that 'difficulties were mainly overcome by gestures, hand signalling, pointing and speaking slowly'.[129]

Doughty argues that the self-perpetuating belief that 'English is enough' has unintentionally affected the quality of data which are used as the basis for policy on skills and training.[130] Interviews and focus groups with employers have shown that where employers simply do not expect to find language skills they will not ask for them[131] – in other words, a weak supply of language skills is pushing down demand and creating a vicious circle of monolingualism. Case studies of organisations interviewed for the *Beyond English* report[132] suggest that, in the absence of a strong supply of language skills in the labour market, large organisations may train existing staff rather than narrowing the field at the recruitment stage by advertising for linguists. Despite this being an excellent indication of the value that employers attach to language skills, the demand that it implies is hidden in surveys of job advertisements or skills shortages.

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127 The results of this survey appeared in several press reports (e.g. HR Editorial, 'Lack of Staff Knowledge of Foreign Languages Is Damaging UK Businesses', 2012 www.hrmagazine.co.uk/hro/news/1020781/lack-staff-knowledge-foreign-languages-damaging-uk-businesses.) but there were no links to any published report. The reliability of the findings may therefore be questionable.
128 H. Doughty, 'La Grande Illusion: Why Scottish Further Education Has Failed to Grasp the Potential of Modern Languages', *SCILT Languages Review*, 2011.
129 'Mapping Report. Language and Intercultural Needs of SMEs in the Hospitality and Leisure Sectors in Five European Countries', *E-TALIA*, 2011. p. 62.
130 Doughty, H., 2011 op. cit.
131 This was found in research by CILT, 'Labour Market Intelligence for the Qualifications Strategy for Foreign Languages and Intercultural Skills'. It was confirmed in interviews undertaken for the report which appears as Appendix 1 of this publication.
132 Tinsley. op. cit. (Appendix 1). Case studies are included in the main body of this report, *passim*.

National surveys are by their nature an inadequate way of representing demand in a jobs market which is becoming increasingly global, and this applies particularly in the case of language skills which are inherently transnational. Such surveys fail to capture demand for UK nationals with language skills which, although contributing directly to national interests, may be located outside the UK. People with language skills clearly have access to many employment opportunities overseas, although Graham's 2012 analysis of jobs advertised on websites recruiting specifically in the UK found that just 3% of vacancies identified with languages were located outside the UK.

It must be recognised that many employers, perhaps a preponderance of those represented in UKCES surveys, do not have (or at least, do not perceive themselves as having) international connections. This dilutes the message and makes the shortage of language skills seem 'low risk' even when its impact may be very high in the companies concerned. Evidence which is used to encourage education and training providers to align their offer more closely with the world of work can therefore be based on data which are not fully representative and underestimate the relative importance of language skills. The omission or downplaying of language skills in reports such as *Preparing Graduates for the World of Work* then reinforces the deficiency.[133]

The limitations of National Skills Surveys in identifying language skill needs are linked to a wider critique of the remit of Sector Skills Councils. Research by the Institute for Public Policy Research[134] has criticised the limited remit given to Sector Skills Councils in only seeking to articulate employer demand for skills, rather than to identify those skills necessary to drive improvements in business performance and job quality within their sectors. It is therefore possible to question whether, had the role of the Sector Skills Councils been to support higher-value business strategies rather than merely matching supply to poorly-articulated demand, language skills would have emerged as more crucial to the agenda.

Employer surveys can also fail to pick up language needs for other reasons. For example, a survey of members of the Institute of Directors carried out in 2007 looked at the skills and qualities valued among graduate recruits beyond specific technical competences. Foreign language skills featured in a list of 28 different employability skills which respondents were asked to rate according to the importance they attached to them, and the extent to which they were present in graduate recruits. Foreign languages were the only skill out of the 28 not rated as important for graduates to possess by more than 70% of respondents and only a very few Directors said it was 'very important' for recruits to have foreign language skills, compared to 68% who said it was 'very important' for graduates to have 'etiquette and good manners'. Respondents rated 'honesty and integrity' as the most important 'employability skill' of all. The value of such findings is questionable on the basis that foreign language skills have limited comparability with such a broad range of basic qualities and competences. However, when employers were asked how often they witnessed the different skills and qualities, foreign languages once again appear at the bottom on the table. Only 21% said they found these skills 'always' or 'often' among graduate recruits and 25% 'never' witnessed them. The compilers of the survey drew up a list of skills where the greatest percentage gaps were found between the two sets of results and, because of the low showing of language skills in the 'valued' section, even though there was a significant proportionate gap between valuing the skills and

133 CBI/Universities UK, *Future Fit. Preparing Graduates for the World of Work*, 2009.
134 Lawton and Lanning, *No Train, No Gain Beyond the Free-market and State-led Skills Policy*, 2012.

being able to find them among graduates, languages appeared as a low priority. However, the survey shows that nearly twice as many employers hope to find language skills among their recruits as actually do so (39% compared to 21%). The inclusion of language skills in a generic list of this nature highlights the difficulties in conceptualising the role of foreign language skills compared to other types of skills. On the one hand, they are considered as a technical, instrumental skill – and therefore valued only in a narrow instrumental way, and on the other, as in this survey they can be seen as a 'soft' skill to be compared to, but separate from, rather than contributing to, other skills such as literacy, teamworking, problem-solving, adaptability and attention to detail.

3.1.6 Future needs

There is considerable evidence, even within the limitations of National Employer Skills Surveys, to indicate that the need for language skills is growing.[135] From the latest CBI survey, while only 5% of employers say languages are currently an essential core competence for their work, 11% believe they will need them in the next two years.[136] These national findings were echoed in the smaller-scale survey of employers using languages which was carried out for this report: over half expected their needs for language skills to increase in future, and only one expected them to decrease.[137]

Studies which look towards the skills needed for the future and take into account global economic and social trends tend to give languages a higher priority than those focusing on current needs. However, this can sometimes appear as a rather superficial acknowledgement of globalisation rather than the result of serious analysis. Language skills are identified in several of the UKCES's Sector Skills Insights: in **Energy** 'to perform in global markets', in **Retail** 'for managers in countries in which they operate', in **Construction** 'in order to operate successfully in overseas markets', in the **Digital and Creative Industries**, and for **Tourism** as an 'issue for tourism establishments'.[138] The UK Treasury/BIS Plan for Growth notes that businesses in the **Professional Business Services** sector want UK graduates to develop a stronger base in language skills and STEM subjects, linked to focused trade promotion of the sector internationally.[139] It points out that the Professional Business Services sector is highly internationally mobile and links language skills to the 'business-readiness' of the graduates it recruits.

The National Strategic Skills Audit for Wales[140] found that the 'financial sector middle office functions will require people more highly skilled in financial processes but also with more legal expertise, an international background, language skills and a good knowledge of IT' (p. 71). It also found that 'access to language skills' would be needed for developing exports to emerging economies (p. 72) and that language skills were 'enabling skills' for understanding emerging economies – where Welsh businesses can complement as well as they can compete (p. 100).

Much more detailed research is needed of the specific language requirements of each of these industries, how they can be met and the best ways of tapping into the added value that they can provide.

135 Foreign language deficits accounted for 13% of skills shortage vacancies in 2005, 12% in 2007, and 18% in 2009. However they shrank back to 16% in 2011. See section 3.1.1. for discussion of this.
136 CBI/EDI, *Building for Growth: Business Priorities for Education and Skills.*p.46.
137 Tinsley.
138 Matthew Williams, *Sector Skills Insights: Tourism* (UKCES, 2012).Lynn Gambin, Terence Hogarth, Gaby Atfield, Yuxin Li, and others, *Sector Skills Insights: Construction* (UKCES, 2012).Stefan Speckesser and Jim Hillage, 'Sector Skills Insights: Energy Sector Skills Insights: Energy', 2012. Lynn Gambin, Terence Hogarth, Gaby Atfield and Yuxin Li, *Sector Skills Insights: Retail* (UK CES, 2012). Matthew Williams and Jim Hillage, *Sector Skills Insights: Digital and Creative,* 2012 www.ukces.org.uk/assets/ukces/docs/publications/evidence-report-49-digital.pdf [accessed 16 October 2012].
139 HM Treasury/BIS.
140 UKCES, *Skills for Jobs. The National Strategic Skills Audit for Wales 2011.*

3.1.7 Exports

There is a substantial body of evidence, both policy-oriented and academic, showing the extent to which language skills are linked to export growth.[141]

The British Chambers of Commerce survey in 2012[142] focused on the barriers to exporting in the context of the need to rebalance the UK economy towards international trade. It found that the availability of language skills was an important factor in determining business decisions: nearly half of responding companies said that language barriers influenced their decisions on doing business in international markets. The survey asked those companies not involved in exporting what the principal reason for not having exported goods or services. 76% of non exporters said the reason was that they did not have a suitable product or service to export. However, 5% cited languages and cultural differences with overseas markets as the main barrier. In response to the question asked in the 2011 Federation of Small Businesses survey 'what skills does your business need to develop or improve in order to grow', 3% of owners and 2% of staff identified foreign language skills. However, 79% of the respondents were from microbusinesses with fewer than 10 staff, and another survey by the same organisation found that 15% cited language or cultural barriers.[143] The discrepancy in findings of different surveys can be accounted for by differences in the sample and profile of respondents. In a more focused study of small and medium-sized enterprises' (SMEs) approach to doing business overseas by Kingston University, issues relating to languages and foreign cultures were seen as the biggest barrier of all, cited by 31% of SMEs.[144]

Instead of asking employers whether they needed language skills, the British Chambers of Commerce survey started from the assumption that the ability to speak trading partners' languages benefits both entry into and success in foreign markets, and asked which languages were spoken in respondents' companies, matching them to target fast-growing markets. Their findings are reported in section 3.2.2.

The econometrist James Foreman-Peck has shown how market failure in language skills affects the UK disproportionately: whilst there is an inbuilt tendency for everyone to under-invest in language skills, patterns of world trade show that, allowing for other factors, the UK is more likely than other countries to gravitate towards trading partners which have a language in common.[145]

Trade figures (see Figure 9) also show that where we share a common language the balance of trade is in our favour, whereas our commercial relations with non-Anglophone countries are skewed in favour of imports – indicating that although we are managing to buy using English our lack of language skills may be hampering our exports.

141 The most recent summary of policy-based research appears in Mann and others, op. cit. A Europe-wide report by CILT/Interact International, *ELAN: Effects on the European Economy of Shortages of Foreign Language Skills in Enterprise*, 2006 <http://ec.europa.eu/languages/documents/doc421_en.pdf> [accessed 19 October 2012] contains a review of the academic literature up to the date of that publication. See also the bibliography in James Foreman Peck, 'Costing Babel. The Contribution of Language Skills to Exporting and Productivity', *Quarterly Economic Bulletin, Julian Hodge Institute of Applied Macroeconomics*, 2008, 20–28. Also the more recent European report: Stephen Hagen, *Report on Language Management Strategies and Best Practice in SMEs: The Pimlico Project*, 2011 <http://ec.europa. eu/languages/languages-mean-business/files/pimlico-full-report_en.pdf> [accessed 2 November 2012].
142 British Chambers of Commerce, *Exporting Is Good for Britain - Skills*, 2012 www.britishchambers.org.uk/policy-maker/policy-reports-and-publications/exporting-is-good-for-britain-skills.html#.UMDH-9vKdAM.
143 Priyen Patel, *Made in the UK Small Businesses and an Export Led Recovery*.
144 Kingston University/Barclays, *The eXport Factor: British SMEs' Approach to Doing Business Overseas*, 2011.
145 Foreman-Peck, 20–28.

Figure 9: UK trade balances 2011 – top 10 trading partners
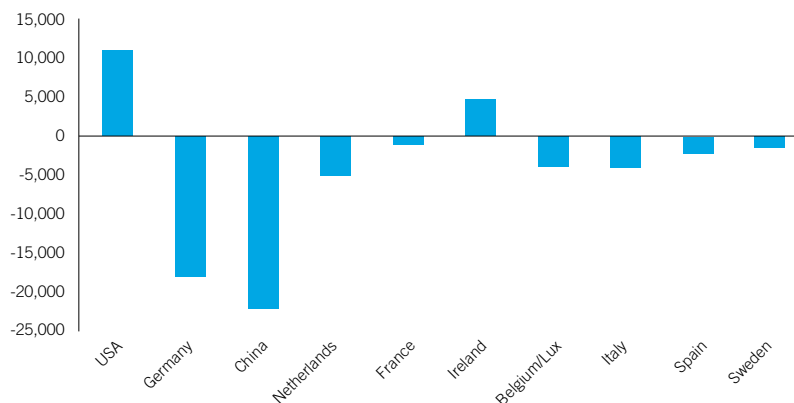
Source: Office for National Statistics, Monthly Review of External Trade Statistics, 2011.

Aránzazu Narbona has shown that English-speaking countries account for a declining share in world trade – 20% in 2008 compared to 26% in 1996. She notes that other languages are becoming increasingly important for international trade both as a way of improving knowledge of markets and in reducing the psychological distance between trading partners. She also brings forward evidence to support a claim that the use of Spanish has a particularly significant impact in increasing trust between international trading nations, more so than English.[146]

The CBI/Ernst and Young report *Winning Overseas* sets out a compelling rationale for the role of language skills in improving exports. The authors make clear that it is not simply a question of communication skills to service existing or even future markets, but about the internationalisation of business outlook and the rebranding of the UK as being 'open for business'. The report notes that the UK, despite being a world leader in certain fields, is 'held back by a reputation for low skills levels, poor language skills and an ageing infrastructure'.[147] In order to succeed in difficult economic times, Britain needs to target high growth markets in less developed economies and develop a more strategic approach focusing on the sectors with the greatest potential for growth and goods which match the demands of the highest growth economies. The report criticises British exporters for being overly serendipitous in their approach – a criticism which chimes with other findings, for example by the British Chambers of Commerce, that firms are 'overly passive' in their approach to doing business internationally and driven by circumstantial or reactive reasons rather than by a clear strategy.

The adoption of a more strategic approach has implications both for the languages required and for the types of industry that will need them, while the CBI's call for British businesses to have greater credibility as international operators requires government leadership to improve foreign language skills across the board. The point is made that this should be in addition to STEM subjects, which have been successfully promoted: 'Businesses need access to high quality employees with cultural awareness and relevant language skills in addition to their technical expertise.'(p. 61).

146 Aránzazu Narbona, 'El Español y El Inglés Como Elementos Determinantes En El Comercio Internacional', in *Word for Word/Palabra por palabra. The social, economic and political impact of Spanish and English*, ed. by British Council/ Instituto Cervantes (Santillana, 2011).
147 CBI/Ernst and Young. p. 6.

Case study: New Era Aquaculture

New Era Aquaculture is an expanding new manufacturing business currently employing 20 staff at its base in Thorne, near Doncaster. Established 7 years' ago, it specialises in dried fish food which it supplies to the retail trade and public aquariums in 35 countries. So far all the overseas business has been handled by the Managing Director, Peter Kersh, who speaks Spanish, French, Portuguese and Italian, with a little German. However with the business growing at 40% per year, the company expects to need an export manager soon and will be looking for a linguist. The company outsources translating for labels and product brochures and is now working on making its website multilingual – it expects initially to need on-line information in Spanish, Italian, German and French. At the time he was interviewed, Mr Kersh had recently returned from Valencia where he was pitching for a contract to supply the biggest aquarium in Europe. He hopes that his presentation in Spanish will have clinched the deal.

3.1.8 Foreign direct investment

Encouraging inward investment is one of the key priorities set out in the Government's *Plan for Growth*.[148] As shown in the global property company Cushman and Wakefield's annual European Cities Monitor, the availability of language skills is among the key factors businesses consider when deciding where to locate.[149] In the 2010 survey, 27% of respondents gave this factor top priority and it is clear that it is not just English language skills that are meant. London regularly rates highly because of the diverse range of other languages spoken in the city, an advantage it has used in its sales messages to the International Olympic Committee as well as to overseas businesses deciding where to invest. The CBI echoes the message that language skills are important for inward investment in its 2011 report Making the UK the best place to invest. It cites the English language as one of the UK's key strengths but says that we are 'struggling with the barrier of working in multiple languages'.[150]

A report for the Scottish Government brought home the importance of language skills not just for existing employers but for the creation of new jobs through inward investment. A major petrochemical company, recently amalgamated with a European partner, cited the inability to recruit staff with foreign language skills as the reason why their Scottish headquarters was unable to bid to become the European sales office. This resulted in a loss of jobs worth £4 million a year to Scotland.[151]

3.1.9 The international dimension

Organisations such as the Association of Graduate Recruiters frequently remind graduates that they are in competition at home with graduates from overseas,[152] but the reverse is also true: British nationals have immense scope to work overseas. However, the international dimension is rarely taken into consideration in skills planning.

In 2012 the Foreign and Commonwealth Office drew to light the fact that UK nationals make up only 5% of the European Civil Service, whilst accounting for 12% of the population of Europe. In 2011 only 2.6% of applicants were UK nationals – fewer than from any other member state[153] – and a key reason for

148 HM Treasury/BIS.op. cit.
149 Cushman and Wakefield, *European Cities Monitor*, 2010.
150 CBI, *Making the UK the Best Place to Invest*, 2011., p. 10
151 Grove. op. cit
152 AGR's Graduate Recruitment Survey 2010 found that many employers were looking abroad to recruit the most talented graduates and 'reap the benefits of an international workforce'.
153 Minister for Europe David Lidington, 'More UK Nationals in the European Civil Service Can Transform Our Influence', 2012 <http://blogs.fco.gov.uk/davidlidington/2012/03/20/more-british-nationals-in-the-eu-civil-service-can-transfrom-our-influence/> [accessed 1 January 2013].

this was that English-speaking applicants must offer either French or German as a second language. A campaign to encourage more UK nationals to apply stated that the shortage of British staff was undermining UK influence in Europe and that it would be in the national interest to increase the proportion.[154]

There is now a considerable body of literature concerning the skills graduates will need in future to compete in the global economy.[155] These reports tend to stress a 'globally attuned mindset' in which language skills play a facilitating role. The Council for Industry and Higher Education (CIHE)'s report on graduate employability[156] surveyed 233 employers and had found that 21% considered language skills important for new graduates, rising to 26% for international employers. This survey rebalanced the emphasis on STEM subjects in Leitch[157] and Sainsbury[158] by showing that 'soft skills' such as communication and team working were the most important capabilities sought in new graduates. The Association of Graduate Recruiters/Council for Industry and Higher Education report Global Graduates into Global Leaders identifies a set of global competences amongst which multilingualism, although ranked as relatively unimportant per se, is clearly an enabler:

'Ultimately UK graduates, like their international counterparts, must be able to work across national borders, manage complex international and intercultural relationships and understand global aspects of the world of work'[159]

Another piece of research for the CIHE[160] noted that senior managers and CEOs in FTSE 100 companies are becoming increasingly multilingual and that 45% of the largest companies listed in the UK now have non-British chief executives. On the basis of interviews with such employers, researchers noted that the recruitment bar for graduates had been raised and specifically highlighted languages within the sort of profile that is increasingly being required of new recruits: 'an individual, often with a command of at least two languages, who has initiative, motivation, independence, a willingness to learn and adapt to a different education system and culture and an ability to live and work in environments other than that of their home country'. The report concluded that in order not to be disadvantaged globally, British graduates should be encouraged to gain overseas study experience in order to become 'not just conversant with another language but also with the culture and way of thinking that the language reflects'.

This analysis makes the case for the need for language skills within a highly mobile international elite, but leaves aside the question of whether languages might be of value to others within the workforce.

3.1.10   Commentary
This section has shown that in addition to the three levels of demand for language skills which are explicitly articulated by employers, there are two

154 http://www.youtube.com/watch?v=oPsVUyoLQCc
155 E.g. Will Archer and others, *Graduate Employability: What Do Employers Think and Want ?*, 2008. J Diamond, A, Walkely, L, Forbes, P, Hughes, T, Sheen, *Global Graduates into Global Leaders* (AGR/CIHE). Richard Brown, Will Archer and Jennifer Barnes,, *Global Horizons and the Role of Employers*, 2008.
156 Archer and others.op. cit.
157 Leitch. op. cit.
158 Lord Sainsbury of Turville.
159 Diamond, A, Walkely, L, Forbes, P, Hughes, T, Sheen. op. cit. p. 5
160 Brown, Archer and Barnes,. CIHE, 2008, Global Horizons and the role of employers,

further levels to be taken into consideration. First, there is the implicit demand for language skills embedded into the package of employability skills and attributes that employers find attractive. Second, there are strong indications of latent future demand which a wide range of bodies expect to be realised in the next few years. Whether the purpose is for skills planning, for developing provision or for advising students on careers options, these five levels must all be given due weight in relation to the jobs market for languages.

Figure 10: The structure of the jobs market for languages (full version)

Explicit demand

Both explicit and implicit demand

Implicit demand

A: Specialist linguist roles (translator, interpreter, teacher)

B: Jobs requiring languages alongside other (non-linguistic) professional skills

C: Jobs for which languages are a desirable extra

D: Implicit demand embedded in other desired skills and attributes

E: Latent or future demand
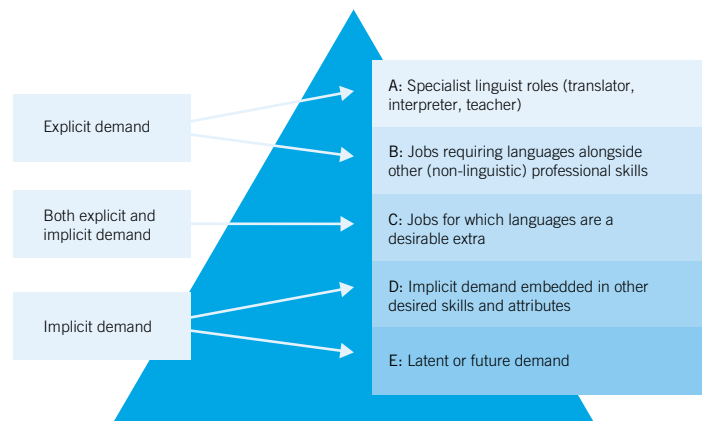
This schema provides a structure for considering the jobs market for languages, but the information available is patchy and incomplete and is inadequate for quantifying the extent of demand for languages. Levels D and E are particularly difficult to quantify. The CBI and National Employer Skills Survey data cover mainly Level B, with some Level A but are based on numbers of employers, not the number of jobs available within each company. Surveys of job vacancies go further towards capturing the full range of explicit demand (Levels A, B and C), but can only measure recruitment patterns at a set point in time rather than patterns of language skill use within the workforce as a whole.

The data examined shows that the peak of the pyramid – specialist linguist roles – accounts for a very small section of the workforce indeed – likely to be less than 10% of all demand for language skills. The vast proportion of jobs for which languages are explicitly needed is spread across a wide range of occupational sectors in combination with a similarly wide range of other workplace skills. From Graham's analysis of vacancies, it would appear that the number of jobs at Level C – jobs for which languages are a desirable extra – may only account for a small proportion (9%) of total language jobs. However, evidence from recruitment agencies suggests that languages give an advantage in many jobs even when not explicitly stated. A portion of Level C demand – specifically referring to language competence rather than other skills and attributes (such as international awareness) acquired through language learning, must therefore be regarded as implicit rather than explicit.

This section has shown that UK language skill needs are frequently underestimated by employers who avoid rather than address language barriers, and in skills surveys because employers who are aware of their needs may meet them in other ways: through training or by recruiting foreign nationals. However, evidence which links language skills to improved business performance and penetration of new markets is strong. This calls for a strategic approach to stimulating demand as well as supply, and support for better management of language skills by businesses in order to derive the associated benefits.

3.2 Which languages are most in demand?

This section covers:

- Current demand for different languages
- Future projected demand.

3.2.1 Current indications

Annual CBI Education and Skills surveys from 2009 onwards have tracked employer demand for different languages.[161] Figure 11 shows the languages that employers report they most want – responses showed a similar pattern over each of the last 4 years and the results have been consolidated to provide a bigger sample:

Figure 11: Demand for different languages
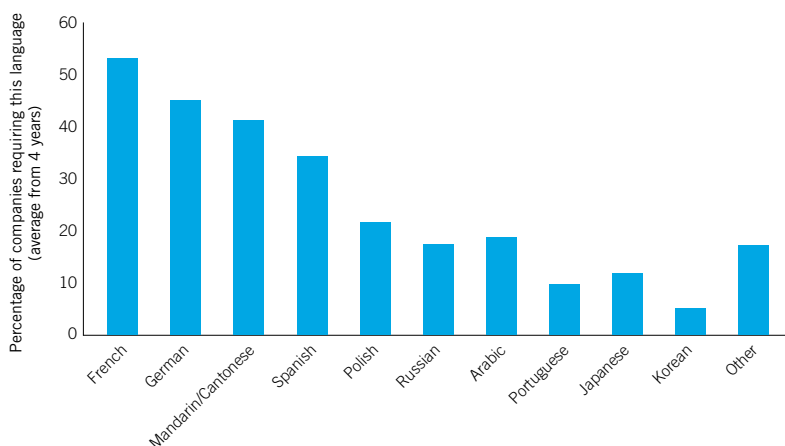
Sources: CBI Education and skills surveys 2009–12.

Here French, German and Spanish (the languages most frequently taught in UK schools and universities) account for 48% of total demand. Chinese languages feature very strongly, and also Polish, reflecting labour market and other economic links with Poland. It is important to note that the demand for 'new' languages (i.e. other than those commonly taught in schools) is not *instead of* but *in addition* to those of the large European economies which have traditionally featured strongly in UK education systems.

Analyses of Labour Market Intelligence on languages, which have drawn on the CBI surveys as well as other sources, have confirmed this pattern of demand for different languages.[162] Recruitment patterns for jobs with languages also show a strong bias towards French, German and Spanish as the languages most requested in job advertisements.[163] Together these three languages account for 57% of demand in the most recent survey – see Figure 12. Other European languages are also being requested and the researcher notes that in total over 96% of vacancies logged required skills in a 'European' language – although this does not necessarily mean that languages like Spanish and Portuguese are to be used in a European context. Both this and a previous survey[164] confirm

161 CBI 2009, 2010, 2011, 2012 op. cit.
162 Graham, 2012 op. cit. and Graham and Mulkerne, 2011 op. cit.
163 Anne Marie Graham, 'Labour Market Intelligence for Languages – a Picture of the Jobs Market, Summer 2012'.
164 Mulkerne, S and Graham, AM 'Labour Market Intelligence on Languages and Intercultural Skills in Higher Education', *University Council of Modern Languages*, 2011 www.ucml.ac.uk/sites/default/files/shapingthefuture/101/17 – Anne Marie Graham emp resource template_0.pdf [accessed 15 October 2012].

that French and German are the two languages which are currently most sought after, in some cases in combination with each other. In the more recent survey 15% of employers requested *both* French and German.

In contrast to the CBI findings, Italian, Dutch and Scandinavian languages feature strongly in job advertisements for languages, but Chinese languages and Polish account for very few actual job advertisements. This may be because employers fulfil their needs for these languages from other sources – for example, by recruiting directly in the country concerned. However it is possible that employers responding to the CBI survey are reflecting general aspirations rather than specifically identified needs and perhaps underestimate the need for Italian, Dutch and Scandinavian languages whilst over-emphasising languages which have a higher profile in current public debate.

Figure 12: Languages requested in job advertisements
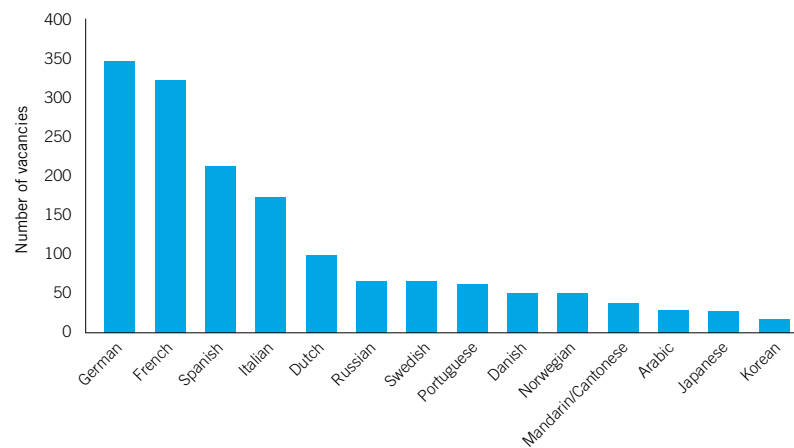
Source: Graham 2013.

In comparison with findings from her 2011 survey, Graham notes that the need for Portuguese appears to have increased – the 2012 findings show that it is now the 8th most sought after language, when previously it was 12th. Graham speculates whether this may be evidence of growing interest in the languages of the BRIC countries, although only a small number of advertisements asked specifically for Brazilian Portuguese. In all, 47 different languages were requested in the 2012 survey, up from 25 in the previous version. However, there had been no change in the top 15 languages requested.

The survey of employers known to be drawing on language skills, carried out specifically for this report, adds to the picture by focusing on actual practice rather than on job vacancies or perceived needs.[165] This asked specifically which languages employers were using and in which organisational functions (e.g. sales, production, service provision) and the findings are shown in Figure 13. This once again puts French in first place, but followed in second place by Spanish. Italian – which was included explicitly in this questionnaire – makes a strong showing, and the use of Arabic[166] is as frequent as the use of Chinese. The 'other languages' category is very large indeed and it is significant that, in

165 Teresa Tinsley, *Beyond English. Britons at Work in a Foreign Language,* 2013. See Appendix 1.
166   It should be noted that 'Arabic', as used in this report, refers to the range of descendent languages.

what was a fairly small-scale survey (57 respondents) 45 different languages were named as actually being in use, and many more referred to (e.g. 'Eastern European languages'). The range of languages included many which are widely spoken in Britain by people with a foreign background or heritage. Languages including Gujarati, Hindi, Farsi, Greek, Portuguese and Hebrew were all found to be used not only in local public service contexts but also by private for profit organisations working in international contexts.

Figure 13: Frequency of languages in use by UK employers (public, private and voluntary sectors)
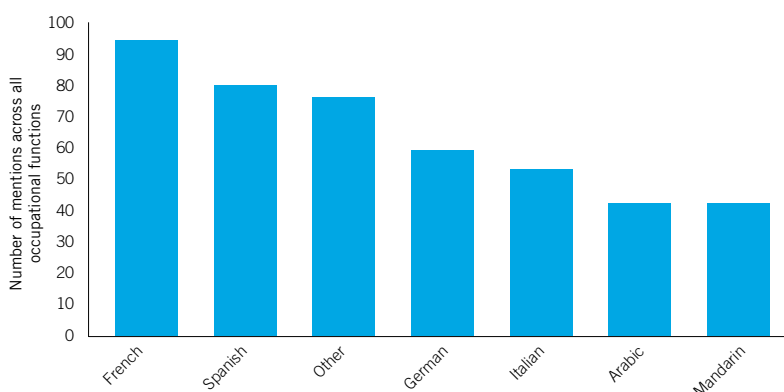
Source: Tinsley, 2013.

Another finding of this survey was that companies and organisations going beyond English operate multilingually. In other words, they do not tend to restrict themselves to using just one or two foreign languages; once the benefits of going beyond English are perceived, they employ as wide a range of languages as possible. However, in Graham's analysis of job advertisements only 6% of posts required candidates in two or more languages, although 29% specified two or more languages that would be recognised in the recruitment process.

There is little evidence to show whether different languages are needed in different sectors of the economy.

The British Academy's *Lost for Words* inquiry has found that Arabic, Mandarin, Farsi, Turkish, French and Russian are priority languages for the FCO and Pashto and Dari were also mentioned in relation to defence.[167] Graham's analysis of job advertisements indicates that there is very little recruitment for non-European languages outside the Finance and IT sectors – the two sectors which have the highest proportions of vacancies overall (see 3.3 for further discussion of this). French and German were predominantly the languages requested across all sectors and in the engineering sector all languages requested were European languages. Roles in communications, sales and marketing tended to ask for a more diverse range of languages, reflecting the customer base of the companies advertising the vacancies.

A small-scale study of the hospitality and leisure sector in Coventry and Warwickshire found that language barriers were most likely to arise when dealing with visitors from China (10), France (9), Poland (7) and Germany (6).[168] However, the survey did not say whether this was more than a reflection of the origin of customers from abroad.

167 British Academy, *Lost for Words,* forthcoming
168 'Mapping Report. Language and Intercultural Needs of SMEs in the Hospitality and Leisure Sectors in Five European Countries'.

3.2.2 Projecting future demand

There is evidence that, as language needs grow, so the balance of languages required is changing. The survey of employers carried out for this report showed that, although many were already using a wide range of languages, around a quarter expected to need an even wider range of languages, and a fifth expected the balance between the languages they used to change.

Exports

Business organisations and government alike have called not only for a rebalancing of the UK economy towards exports, but a rebalancing of export markets themselves towards less advanced economies which can deliver high growth. Figure 14 shows the current skew of UK exports towards advanced economies and those where it is possible to communicate in English. It is notable too that Germany and France, countries whose languages have traditionally been taught in schools, feature as important markets for UK goods.

Figure 14: UK exports in 2011: established versus upcoming markets
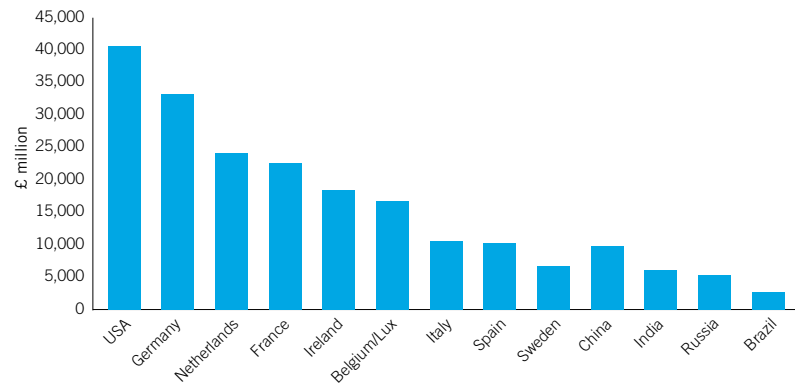
Source: Office for National Statistics.

The British Chambers of Commerce, which identified a serious deficit of language skills in exporting businesses, showed that this was most severe in the case of the fastest-developing markets in Russia and China. It found that up to 96% of respondents had no foreign language ability for the markets they served and that even in French, only 4% said they were competent enough to make business deals in the language.

Figure 15: Language skills of owners of exporting businesses
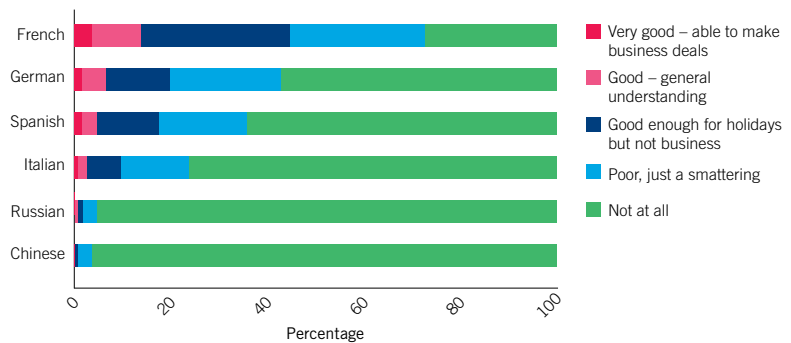
Source: British Chambers of Commerce, 2012.

The Government's growth strategy[169] identified the BRIC countries (Brazil, Russia, India and China), and also Indonesia, Mexico, Poland and Turkey as target markets for the rebalancing of exports. The CBI's *Winning Overseas* report develops this further and mentions the 'Next Eleven' countries cited by Goldman Sachs which have favourable market conditions. Its partner, Ernst and Young, put forward a Guide to Export Success as an appendix to the report[170] which mentions 25 rapidly-growing economies as potential targets for the expansion of UK trade. This document explicitly calls for improved language skills to help UK businesses recover the ground they have lost in their share of global exports and achieve the ambition they set out to boost UK GDP by £20 billion by 2020. The targeted countries, together with the language they will require, are set out below:

Figure 16: Key countries and languages for future growth[171]

	Status	Key languages
Argentina	E&Y25	Spanish
Bangladesh	Next11	English, Bengali
Brazil	BRIC, E&Y25	Portuguese
Chile	BRIC, E&Y25	Spanish
China	E&Y25	Mandarin, Cantonese
Colombia	E&Y25	Spanish
Czech Republic	E&Y25	Czech
Egypt	Next11, E&Y25	Arabic
Ghana	E&Y25	English, Akan
India	BRIC, E&Y25	English, Hindi and many others
Indonesia	Next11, E&Y25	Indonesian
Iran	Next11	Farsi
Kazakhstan	E&Y25	Kazak, Russian
South Korea	Next11, E&Y25	Korean
Malaysia	E&Y25	Malaysian
Mexico	Next11, E&Y25	Spanish
Nigeria	Next11, E&Y25	English, Hausa, Yoruba, Igbo
Pakistan	Next11	Urdu
Philippines	Next11	Tagalog, English
Poland	E&Y25	Polish
Russia	BRIC, E&Y25	Russian
Saudi Arabia	E&Y25	Arabic
Taiwan	E&Y25	Mandarin
Thailand	E&Y25	Thai
Turkey	Next11, E&Y25	Turkish
UAE	E&Y25	Arabic
Ukraine	E&Y25	Ukrainian
Vietnam	Next11, E&Y25	Vietnamese

Tourism

The Government's Tourism Policy document, published in 2011,[172] also highlights the importance of the BRIC economies (Brazil, Russia, India and China) if the UK is to maintain its place among the top ten global tourist destinations. It points to a fast-growing middle class in these and other countries which means that tourism globally is expected to grow strongly in the years to come. However, our existing tourist links depend heavily on shared language and culture with the USA,

169 HM Treasury/BIS. op. cit.
170 CBI/Ernst and Young.
171 See section 5.1 for a mapping of these countries and languages against supply indicators
172 John Penrose, *Government Tourism Policy*, 2011.Department for Culture Media and Sport.

Australia, Ireland and the Commonwealth as well as on our proximity to advanced European nations. The document makes the point that information will need to be provided – electronically and in the form of local signage and leaflets – in a wider range of languages. It points out that service and hospitality jobs are often seen as poor quality and states that it will improve their professional standing and career structures. It does not however go so far as to link language skills with improved visitor experience as a way of delivering growth in the sector.

Global language trends

David Graddol has drawn attention to the impact of demography and other factors on restructuring the global 'languages system' and the growing importance of languages such as Mandarin, Arabic and Spanish alongside English.[173] The most recent statistics on internet use globally confirm that English accounts for a declining share as internet use spreads beyond the most developed economies and that the use of Mandarin, Arabic and Russian on the web has increased massively over the last decade – by more than 2,500% in the case of Arabic. Users of Portuguese have also increased proportionately, and Spanish retains a stable share, due to the spread of internet access in Latin America. As the charts below show, English is still the most widely used language on the internet, but is likely to be overtaken by Chinese in the next few years (if indeed it has not already have been). The languages of the most advanced economies – early adopters of the internet – Japanese, German, French and Korean, represent less of a share in 2011 than in 2006, and the place of Italian among the top ten over the same period has been taken by Arabic.

Figure 17: Distribution of languages on the internet, 2006
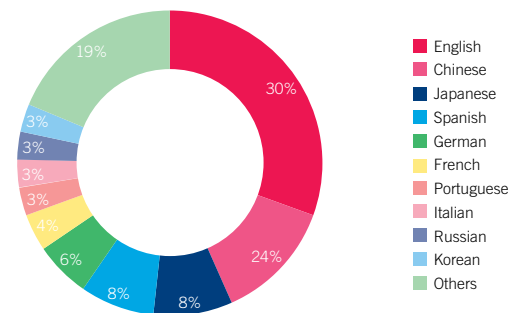
Source: Internet World Stats Top Ten Languages used on the Web.[174]

Figure 18: Distribution of languages on the internet, 2011
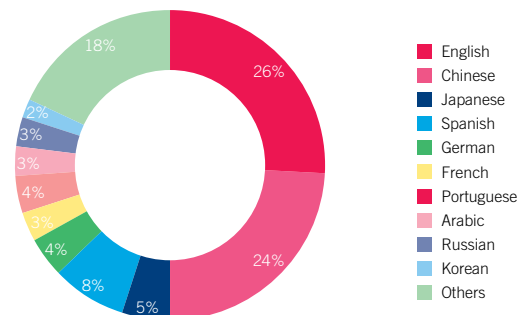
Source: Internet World Stats: Top Ten Languages used on the Web.[175]

173 David Graddol, *English Next* (British Council, 2006).
174 'Top Ten Internet Languages – World Internet Statistics' www.internetworldstats.com/stats7.htm [accessed 1 January 2013].
175 *idem.*

3.2.3 Commentary

Currently a large proportion of demand for language skills – at least half – is for the major western European languages most frequently taught within the UK education systems. A clear correlation exists between the languages taught and the languages used. The causality of this relationship must surely work in both directions: on the one hand we have been able to develop strong trading relationships with the countries whose languages we speak best, on the other, decisions about which languages to learn are made on the basis of existing cultural contacts and trading links. However this correlation tells only part of the story: businesses and public sector organisations are already using a very wide range of languages which go beyond those offered within the education system, and all the indications are that the future demand will be for an increasingly wide range of languages as the UK expands its global contacts and responds to new economic realities. There is also a strong correlation between the languages businesses now need or expect to need in future, and those languages spoken by young people whose background is from outside the UK.

3.3 In which industries are language skills most in demand?

Foreign languages are in use in all sectors of the UK economy: even a relatively small-scale survey of employers known to be using languages found that its respondents represented practically all industry sectors in the UK.[176] But are there specific industries where the need for language skills is felt more strongly, or where there is likely to be an increased need in future? And what can we learn from this about the mix of skills that are required alongside languages?

3.3.1 Overall indications

The 2009 National Employer Skills Survey (England) showed that the sector where language skills deficits was being felt most keenly was the Finance sector, followed by Transport, Storage and Communications, and Hotels and Catering, as shown in Figure 19. Much higher than average skills gaps in foreign languages were occurring particularly in Financial Intermediation and in the Transport, Storage and Communications industries.

Figure 19: Proportion of language skills deficits as % of total, by sector, 2009
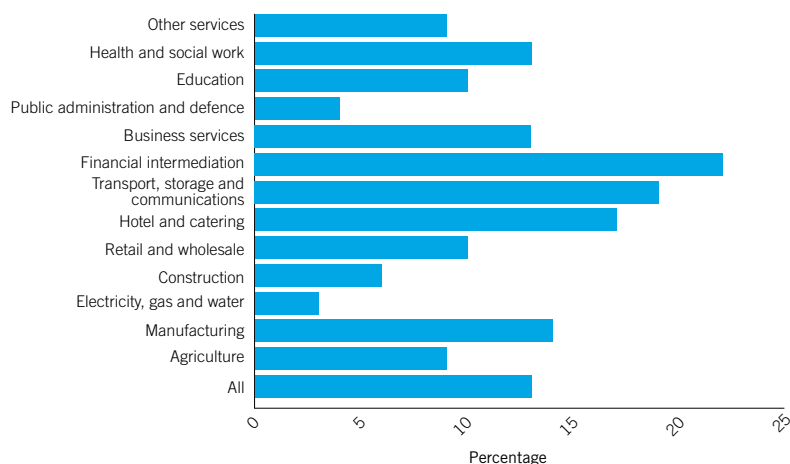
Source: UKCES 2009 National Employer Skills Survey (England).

176 Tinsley, *Beyond English. Britons at Work in a Foreign Language.* See Appendix 1.

The Sector Skills Councils in whose areas the largest proportion of language skills deficits were identified (again, 2009 and England only) were GoSkills (Hospitality, Passenger Transport, Travel and Tourism), e-Skills (IT and telecommunications), Improve Ltd (Food and Drink manufacturing) and Financial Skills. Figure 20 shows the sectors where language skills are most in demand compared to the average across all sectors.

Figure 20: Foreign languages skills gaps by sector, 2009[177]
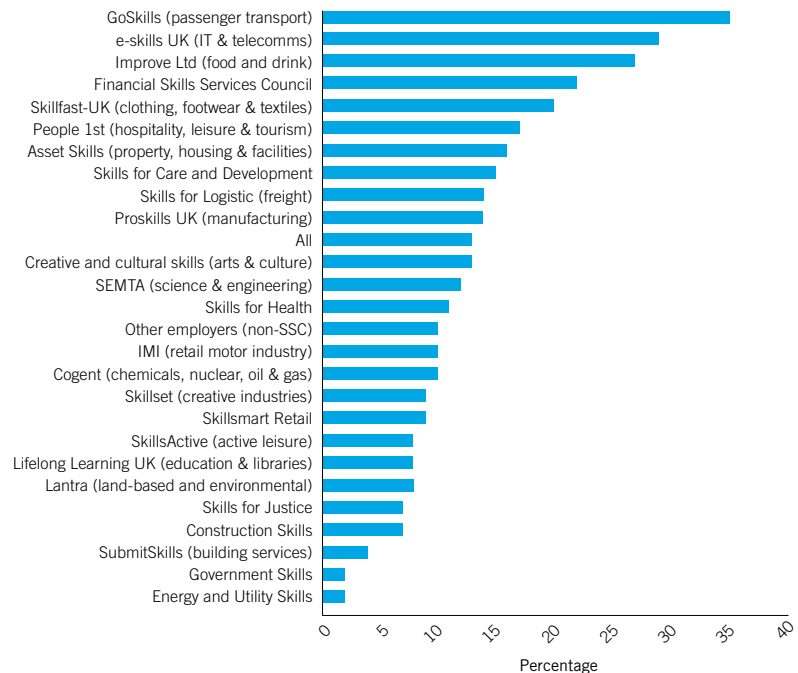
Source: National Employer Skills Survey for England, 2009.

Having seen the limitations of such surveys in identifying the full range and extent of demand for language skills (cf. section 3.1.6), these findings can only be regarded as providing a first indication rather than a definitive picture. Findings from other sources suggest that the reality is more nuanced and complex.

In the Federation of Small Businesses 2004 survey – one of the few other sources of information although not very current – the level of dissatisfaction with language skills was highest in Public Administration and Defence (17%) and Manufacturing (17%). Business Services (14%), Transport and Communications (13%) and Hotels and Restaurants (13%) also reported comparatively high levels of dissatisfaction. There is some overlap here with the National Employer Skills Survey findings. However, small businesses in the Financial Services field reported less dissatisfaction with language skills (8%).

Graham's analysis of job vacancies found that IT[178] and Finance[179] are the sectors most likely to be recruiting currently for staff with language skills. However, the study recognises that these are sectors recruiting most strongly

177 NB. Since the survey was carried out some Sector Skills Councils have merged or ceased to operate.
178 Anne Marie Graham, *Labour Market Intelligence Report – a Picture of the Jobs Market, Summer 2012*, 2013. IT includes the games industry, hardware and software, technology and telecommunications. Graham noted that within the IT sector the games industry provided a particularly strong market for language skills.
179 Included in this sector were banking, accountancy, insurance, financial services, investments, credit control and purchase ledger roles.

in the jobs market more generally, so it is to be expected that their share of the jobs market for language skills would be higher. The AGR Graduate Recruitment survey 2009[180] found the graduate vacancy market dominated by accountancy/professional services, oil companies, and investment bank/fund managers whereas they reported that employers in the public services were predicting a decrease in vacancies.

Using the same industrial classification index as the National Employer Skills Surveys, Graham showed that as well as Finance and IT, the Education, Marketing /PR and Media[181] sectors were those recruiting most strongly for staff with language skills – see Figure 21.

Figure 21: Top 5 employment sectors advertising for languages
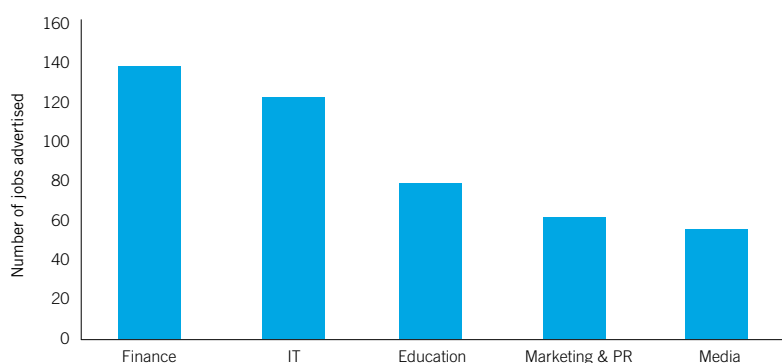
Source: Graham, 2013.

The high number of jobs with languages in Marketing and PR contrasts with findings from Tinsley's survey of employers which suggested that Marketing and PR is the function least likely to require language skills (see section 3.4.2). This may be because Graham's analysis highlights jobs in specialist Marketing and PR companies, whereas Tinsley's focuses on these functions within companies. This may indicate that employers are outsourcing Marketing and PR work to specialist companies where this work involves foreign language skills.

Graham's work shows that jobs with languages are spread over a wide range of other sectors, providing further evidence that foreign language skills are in use across a broad span of economic activity in the UK. It also points to the sectors which may be relatively infrequent users of language skills. She reports that sectors including energy, sports and leisure, environmental industries and construction each represent a very low proportion of the jobs market for languages (less than 1%). These industries were also among those reporting the lowest demand for language skills in the 2009 National Employer Skills Survey for England (see Figure 20). It is interesting that in Graham's research the hospitality industry posts such a low number of vacancies for languages when in 2009 the UK CES had identified such a high level of language deficit in this industry.[182] This may be to do with recruitment patterns or practices within the sector which fell outside the scope of Graham's research.

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180 AGR, *Graduate Recruitment Survey 2009*, 2010.
181 Including journalism, radio, TV, digital media and business to business roles. 42% of the jobs advertised in this sector were digital media roles.
182 Note that, following the Standard Industrial Classification Codes, Hospitality and Travel and Tourism were logged as separate categories, although they both come under the responsibility of the same Sector Skills Council – People 1st.

Figure 22: Other sectors recruiting for language skills
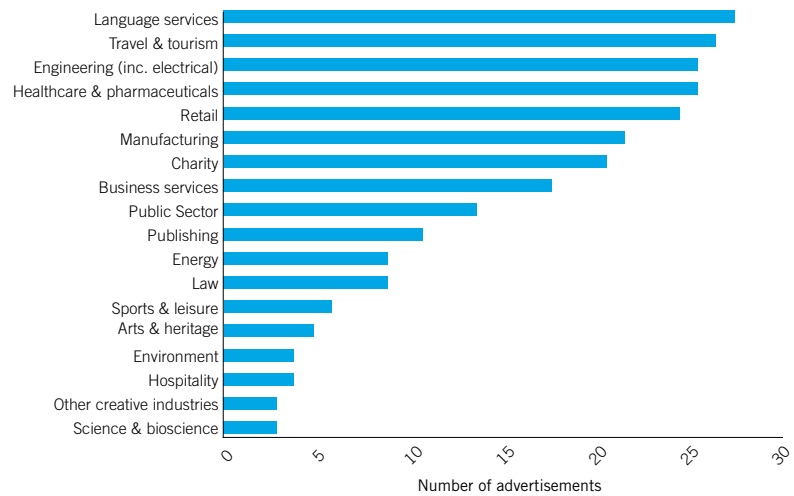
Source: Graham 2013.

It is likely that a portion of the jobs identified by Graham in fields such as Engineering, Healthcare, and Law are for members of the professions who require language skills. It would be useful to follow up this line of enquiry in future research.

3.3.2 Language needs within specific industries

a. Digital and creative industries

In its recent Sector Skills Insight the UKCES identified a higher than average demand for language skills in the creative sector, which includes broadcasting, film, advertising , arts and entertainment, but a lower than average need for languages in the digital part of the sector which focuses on telecommunications, computer programming and information technology.[183] This in part chimes with findings from Graham that there were a large number of jobs advertised in the Media involving languages, but contradicts various sources which have shown that the IT sector uses language skills widely. In particular Graham found numerous jobs in the computer gaming sector requiring language skills. Graham actually found a low number of jobs advertised in 'other creative industries' apart from media and publishing. This shows the need for a finer-grained approach to identifying demand for languages as within the broader industrial categories needs may vary widely.

In 2003, a detailed language skills audit was carried out of the IT and Telecoms sector (e-skills).[184] In the IT and Telecoms sector, just under 40% of companies surveyed claimed to be regularly using at least one foreign language and 46% expressed their intention to trade in new non-English speaking markets in future. Although the future target markets identified were extensive, the research concluded that international expansion in this sector was oriented towards markets where English was more widely spoken such as the Netherlands, Middle East and Scandinavia. However, Graham's recent research found a large number of jobs requiring Dutch, Swedish, Danish and Norwegian. One explanation for this may be that companies enter Dutch and Scandinavian markets believing that English is sufficient, but later discover a need to recruit for skills in these languages for certain functions.

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183 Williams and Hillage. op. cit.
184 CILT/Interact International, *E-skills: IT, Telecoms and Contact Centres Language Skills Analysis Report*, 2003.

b. Education

The demand for teachers of languages is closely related to policies on language teaching and learning in schools. As noted in Chapter 2, in both Scotland and England there are plans to strengthen the teaching of languages in primary schools, which will lead to an increase in demand for primary school teachers able to teach a foreign language. Some of this demand will be met through in-service training of existing teachers and also by including a language improvement element within initial training courses. Moves to raise participation in language learning in secondary schools in England will also see an increase in demand for language teachers, following a period of decline. The UKCES's Sector Skills Insight on Education[185] sees supplying sufficient numbers of teachers in modern languages (and STEM subjects) as a key challenge for the education sector and highlights competition between the private and public sectors in attracting suitably qualified and experienced candidates. Languages are regarded as shortage subjects in teacher training in England, along with Physics, Chemistry and Maths, and substantial bursaries are available to attract trainees.

c. Finance

A number of different sources of evidence agree that finance is a key sector for language skills. In 2006 the Financial Services Skills Council published a report on Graduate Skills and Recruitment in the City which highlighted the increasing tendency towards recruiting foreign graduates.[186] Both overseas students graduating from UK universities, and graduates from universities outside the UK, are believed to have attributes that UK graduates are perceived to lack. Most obvious among these, says the report, are foreign language skills, although foreign graduates are also perceived to have greater maturity and business awareness.

More recently, Mary Fischer has investigated language use in investment fund management and strategies used in this industry for overcoming language barriers.[187] She draws attention to the use of 'bridge individuals' – bilingual staff who make the initial contacts and hand over to monolingual colleagues once the relationship is established. She found that this role is often fulfilled by employees from outside the UK who have brought language skills with them into the organisation as an 'added bonus' rather than something which was required at the recruitment stage. This is further evidence of the existence of an 'implicit' level of demand for language skills within the labour market.

d. Government

In parallel with the commissioning of this report, the British Academy is carrying out a major inquiry into the need for languages in UK diplomacy and security.[188] This took evidence from the Foreign and Commonwealth Office, the Home Office and the Department for International Development, as well as the Metropolitan Police, the Security Service, and Government Communication Headquarters (GCHQ). Many of those interviewed felt that they could 'do the job' without language skills but that by speaking the relevant language, the job could be done better and more effectively. The notable exception to this were the Secret Intelli-

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185 Sally-Anne Barnes and Terence Hogarth, *Sector Skills Insights: Education* (UKCES, 2012).
186 Financial Services Council, *Graduate Skills and Recruitment in the City*, 2006.
187 Mary Fischer, 'Is English Enough? Strategies for Dealing with Foreign Language Encounters in the Financial Sector' (LLAS, 2012).
188 British Academy, *Lost for Words: The Need for Languages in UK Diplomacy and Security*.

gence Agencies, for whom linguists were essential. The cultural aspect of language is regarded as highly important to counter-terrorism work, where knowledge and understanding of idioms and cultural references can be vital.

There is evidence that languages are rising up the agenda in government. In the 2009 National Employer Skills Survey the sector covered by the Government Skills Sector Skills Council appeared second from bottom in relation of perceived demand for language skills.[189] However more recently, Graham found that jobs with languages were being advertised within the sector in policy, military, security and regulatory roles.[190]

The UK Foreign and Commonwealth Office (FCO) has recently announced an increase in the number of diplomatic jobs overseas for which language skills will be an absolute requirement. However, as the case study shows, it expects this demand to be supplied through internal language training rather than through recruitment and has increased its budget for this by 30%. This is another example of implicit demand for language skills. In a speech on Diplomatic Excellence in the 21st century, Rt Hon William Hague, MP, Secretary of State for Foreign Affairs, nevertheless made a strong case for language skills:

'We need more skilled diplomats…who are able to get under the skin of those countries, who are immersed in their language, culture, politics and history and who have access to decision-makers and can tap into informal networks of influence'.[191]

The FCO has also highlighted the importance of language skills for careers in the EU civil service where British applicants need to offer either French or German to be eligible. Rt Hon. David Lidington MP Minister of State for Europe provided figures showing that Britons account for only 5% of the EU civil service, despite representing 12% of the population of the EU. He also said that in 2011, British applicants made up only 2.6% of applicants for the available posts.[192]

In the Government's Plan for Growth, there are plans to use foreign languages more strategically in visa application documentation in order to show that the UK is 'open for business' – although this does not explicitly extend beyond translating guidance into more languages.

189 Jan Shury and others, *National Employer Skills Survey for England 2009*, 2010.
190 Anne Marie Graham, *Labour Market Intelligence Report – a Picture of the Jobs Market, Summer 2012*.
191 William Hague, 'Diplomatic Excellence in the 21st Century – Speeches – Inside Government – GOV.UK', 2012 <https://www.gov.uk/government/speeches/diplomatic-excellence-in-the-21st-century> [accessed 1 January 2013]. Transcript of speech delivered on 9 July 2012.
192 David Lidington. op. cit.

CASE STUDY: Foreign and Commonwealth Office

Language capability forms an important principle within the Foreign and Commonwealth Office's new 'excellence in diplomacy' policy. In order to achieve this, the FCO has increased both the budget for teaching languages and the number of posts designated as 'speaker slots' for which languages are an absolute requirement. It has also raised the bar on the level of language competence which diplomats are expected to achieve. For most posts this is now what is internally designated as 'operational level', a high level of competence equivalent to level C1 on the Common European Framework of Reference. Full time training is provided for staff who will occupy these positions, which are generally at management rather than administrative grades. The FCO allows 22 months full time to achieve level C1 from scratch in languages which are difficult for English speakers to learn, such as Arabic and Chinese. This includes a year living in a country where the language is spoken. For languages which are more similar to English, such as Spanish, the time allowed is 7 months. Speaking is an essential skill for all profiles, and reading and listening are generally also required. Writing is only relevant in some profiles although it is generally included as part of the training programme as a way of assisting the development of the other skills. Diplomats do not generally write in the foreign language as this task is generally carried out by local staff, who are native speakers.

In addition to this focused training for specified diplomatic positions, the FCO also runs other training programmes. Spouses, and diplomats in positions where language skills are an advantage rather than essential, undertake focused training up to level A2. There are also continuous development opportunities to attend language classes in key diplomatic languages. These are: Arabic, Chinese, Farsi, French, Portuguese, Russian, Spanish and Turkish. Language programmes provided by Rosetta Stone are available as an additional facility.

Despite the high value it attaches to language skills, the FCO's recruitment policies do not require language competence or use it as a discriminating factor at recruitment: this is seen as inimical to ensuring equal opportunities. However, internally it uses the Modern Languages Aptitude Test alongside other measures as a way of identifying staff likely to benefit from intensive language training.

e. Health

There is now quite a body of research on the use of language skills in the health services which draws attention to problems including misdiagnosis, medication mismanagement, delay and ineffective service delivery as well as ethical considerations, which result from language barriers.[193] According to one researcher, two thirds of diabetes consultations in London take place across a language barrier.[194] The high level of concern about equitable access to healthcare[195] is matched by concern about the cost of translation services,[196] which may indicate that there will be downward pressure on the demand for specialist language services in the NHS. However, health services already use a variety of solutions to meet the linguistic challenges they face, including relying heavily on the language skills of staff.[197]

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193 See for example bibliographies in *Mighealthnet State of the Art Report – UK* www.mighealth.net/index. php?title=State_of_the_Art_Reports. BICOM, 'Promoting Bilingual and Intercultural Competences in Public Health – Booklet' www.bicom-eu.net/booklet.html.
194 Trisha Greenhalgh, University College Hospital, quoted at www.bicom-eu.net.
195 *Mignealhnet State of the Art Report – UK,* op. cit.
196 Samantha Gan, *Lost in Translation. How Much Is Translation Costing the NHS and How Can We Both Cut Costs and Improve Service Provision?*, 2012.
197 See case study of Royal Marsden Hospital in John Eversley and others, *Language Capital. Mapping the Languages of London's Schoolchildren.* (London: CILT/Institute of Education, 2010).

Although languages are clearly an important factor in this sector, there is very little labour market information available. Graham found around 2.5% of the vacancies she logged were in the Healthcare and Pharmaceuticals sector, predominantly in sales or regulatory roles.

f. International institutions
English mother-tongue interpreters and translators are highly sought after in international institutions such as the European Parliament, European Commission and United Nations. These institutions have reported disruption to services and cancellation of meetings because of shortages.[198] English language interpreters are particularly vital in international institutions where a large number of languages are used, in order to provide a common 'relay' language between lesser-spoken languages. This cuts down considerably on the number of language combinations required. Following a publicity campaign by the European Commission to encourage applications from British nationals, and increased uptake of post graduate interpreting courses, some immediate shortages have now been resolved.[199]

g. The justice system
The demand for interpreting and translation in the public services has been highlighted by a National Audit Office report on the Ministry of Justice's controversial language services contract.[200] Interpreters are used throughout the justice system, partly in compliance with the European Convention of Human Rights which requires anyone arrested to be entitled to interpretation in a language they understand throughout the judicial procedures to which they are subject. There is also a European Council Directive on the Rights to Interpretation and Translation in Criminal Proceedings, which the UK has opted into.[201] The contract to deliver these services was put out to tender as a result of an increase in volume of interpreters required, the number of languages required and the costs involved. It was estimated that 1,200 interpreters were needed, in a very wide range of languages. However, the National Audit Office report found that the contractor had not been able to source sufficient interpreters to meet its obligations and that during the first quarter of 2012, 182 trials in magistrates courts had been recorded as ineffective because of interpreter availability issues. There was substantial additional disruption including delays and cancellations of non-trial hearings and complaints about quality. The Language Services contract is the subject of an Inquiry by the Justice Select Committee which is due to publish its conclusions and recommendations in 2013.[202]

The crisis in provision of public service interpreters for the justice system has drawn attention to the opportunity costs associated with shortages of language skills, and to the impact such shortages can have on the smooth-running of public services. A recent analysis of the sector by Graham[203] makes the point that, in a time of austerity, expenditure on

198 Documented in Sean Mulkerne and Anne Marie Graham, 'Labour Market Intelligence on Languages and Intercultural Skills in Higher Education', 2011. Also in Anne Marie Graham, 'Labour Market Intelligence: Languages and Intercultural Working'.
199 Information supplied verbally by Directorate General Interpretation, European Commission, September 2012.
200 National Audit Office, *The Ministry of Justice ' s Language Services Contract*, 2012.
201 European Council, 'The Right to Interpretation and Translation in Criminal Proceedings' <http://europa.eu/legislation_summaries/justice_freedom_security/judicial_cooperation_in_criminal_matters/jl0047_en.htm> [accessed 6 January 2013].
202 www.parliament.uk/business/committees/committees-a-z/commons-select/justice-committee/news/court-interpreters-ii/
203 Anne Marie Graham, *Training Provision for Public Service Interpreting and Translation in England*, 2012.

language services in the public service is often highly controversial. However such provision is both a legal requirement and a practical necessity where there is a need to liaise with international counterparts or where the recipients of such services – whether suspects, victims, witnesses or others – do not have the necessary command of English.

Information on the need for language skills in the justice system also comes from the Metropolitan Police, where there is an increasing need for them by frontline officers dealing with both routine and emergency situations, and to engage with local communities. The Met employs a mix of solutions, including the use of technology, specialist linguist services and training of existing staff, in order to cover the wide range of languages needed in different circumstances at different levels.[204]

h. Leisure and Tourism

The hospitality, leisure and tourism sector – which is represented by the People 1st Sector Skills Council – registered a higher than average level of demand for language skills in UKCES's 2009 survey (see Figure 20). Graham found that 2.5% of vacancies logged were in the Travel and Tourism subsector, although there were few vacancies for languages in Hospitality at the time of her survey. The overall sector is large and very varied including a wide range of different types of businesses. As with the digital and creative industries, evidence of the need for language skills is patchy, indicating the need for a more fine-grained approach capturing demand and underlying need.

An international report recently shed light on the language needs of the leisure/spa sector in the Coventry and Warwickshire area, based on a survey of 45 businesses.[205] Of these, nearly half regularly dealt with foreign customers and the majority of the rest sometimes did. Respondents reported language problems arising when dealing with visitors from China (10), France (9), Poland (7 – the authors note that this is especially in centres offering bodybuilder and heavy fitness programmes) and Germany (6). They found that there were also cultural problems (such as East Europeans expecting to use the jacuzzi while naked!) but that language barriers and cultural misunderstandings were not perceived by respondents as related issues. They concluded that, despite UK businesses in this sector expecting interactions to be conducted in English they would welcome assistance in improving the experience of their international customers. They note in this regard that the UK is the 6th most visited destination by international tourists but is losing market share.

As noted above (3.1.7) languages were identified 'as an issue for tourism establishments' in the UKCES's Sector Skills Insight for the Tourism industry.[206] The Government's Plan for Growth picks up the need to boost tourism, and, at a practical level, commits to working with the Tourism Industry to ensure that more smartphone apps are available to access tourist information in a wider range of languages.[207] As with the Metropolitan Police, technological solutions will clearly form part of the mix in overcoming language barriers, but there is no mention in the report of possible measures to improve the skills base in languages in this quintessentially international industry.

204 Metropolitan Police and Rosetta Stone, 'The Public Sector Skills Gap – Impact of a Linguistically Versatile Workforce' 2012.
205 'Mapping Report. Language and Intercultural Needs of SMEs in the Hospitality and Leisure Sectors in Five European Countries'.
206 Williams. op. cit.
207 HM Treasury/BIS. op. cit.

i. Passenger transport

In one of the few recent examples of more detailed foreign language skill needs analysis within an industry sector,[208] the Sector Skills Council GoSkills (now merged with People 1st) found that more than a quarter (26%) of respondents to its 2009 survey felt that their existing staff were deficient in language skills, with particularly high levels of dissatisfaction reported amongst airline ground staff and driving instructors (see Figure 23). Airlines in general were more satisfied with their staff's language skills: this may reflect previous recruitment practices and a growing awareness of need in other sections of the industry.

Rail operators reported the highest level of future need for language skills, and there is an 11 percentage point gap between the level of dissatisfaction reported in the skills of the current workforce compared with the anticipation of future need. This may reflect anticipated changes in the industry. Only 2% had provided foreign language training to overcome the gaps identified. The survey found that in relation to skills gaps in general, employers had not analysed the reasons for such gaps and that this was a barrier to targeted action.

Figure 23: Current and future needs for foreign language skills reported by passenger transport employers, % by sub-sector
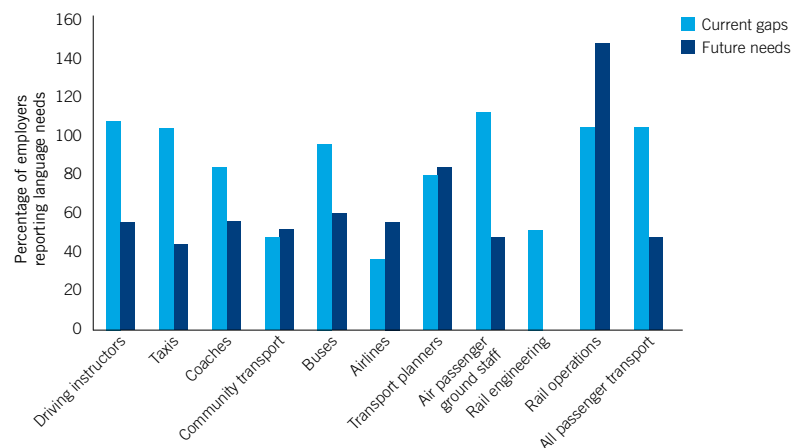
Source: Go Skills, 2009.

j. Science and Engineering

Industry-specific research into language skill needs in the Science, Engineering and Manufacturing Technologies sector (SEMTA) was undertaken a decade ago.[209] At that time, 57% of companies claimed to be making regular use of language skills and 43% were intending to trade in new non-English speaking markets in future. Plans for future expansion identified over 40 individual countries as target markets suggesting a wholly global marketplace where a very wide range of languages would be needed. It would be of interest to undertake repeat research with this sector, 10 years on, to see to what extent these have been realised and what role language skills have played. Although Graham did find evidence of jobs with languages being advertised in both the manufacturing and engineering sectors, the numbers were not as great as could have perhaps

208 OCR International, *GoSkills Employer Skills Survey*, 2009.
209 CILT/Interact International, *SEMTA: Language Skills Analysis Report*, 2003.

been expected given that the international dimension is so important to this industry sector.

3.3.3 Summary synthesis

Although the evidence available shows that languages are used in all sectors of the economy it provides little clarity about the relative need for languages in different industries. Figure 24 synthesises information from key sources in order to identify the sectors where the need for languages is likely to be most critical:

Figure 24: Summary of sectors where languages are most critical

Sector	Identified shortage of language skills[207]	High number of jobs with languages advertised[208]	Languages skills needed in future[209]
Creative industries	✓	✓ (Media and digital)	✓ (+ Wales[209])
Construction	x	x	✓
Education	✓	✓	✓
Energy	x	x	✓
Finance	✓	✓	✓ (Wales)[210]
Food and drink	✓	x	Not published
Hotels and catering	✓	x	Not published
IT	✓	✓	Unclear
Professional and business services Marketing and PR		? ✓	✓[211]
Retail	x	x	ü (managers)
Tourism		x	✓
Transport, storage and communications: Passenger transport	✓ ✓	x	

It is significant that Manufacturing is absent from the list given the emphasis employer organisations have placed on the need for language skills in order to boost sales of British goods abroad.

The evidence is very sparse on how different languages are used in the different sectors of the economy and where precisely the focus needs to be in order to deliver future growth. Some of the sectors identified are very broad, and the information available is extremely patchy. It is unclear how the dissatisfaction expressed with regards to language skills in some of these sectors is being translated into training or recruitment policies – if at all – and what the next step is now that these needs have been identified. Further research and analysis would be needed in order to identify the most effective ways of providing more immediate targeted support.

210   From National Employer Skills Surveys published by UKCES op. cit.
211   Top 5 sectors identified by Graham, 2013 op. cit.
212   From Sector Skills Insights published by UKCES in 2012 op. cit.
213   UKCES, National Strategic Skills Audit for Wales op. cit.
214   Also in the Government's Plan for Growth op. cit.

> ## CASE STUDY: Bosch UK Ltd
>
> Bosch is a global engineering company with its headquarters in Stuttgart, Germany. It employs over 4000 people in the UK at 36 locations including Denham, Worcester, St Neots, Stowmarket and Glenrothes. The Bosch Group comprises subsidiaries in 60 countries and its company language is officially English. However, staff who have dealings with the company head office, including many senior managers, require German – this may be up to a quarter of staff employed in the UK. As day to day contact with head office increases, so the need for competence in German is growing – mainly among engineers and sales staff but also in HR and IT functions. Alistair Cumming, Head of Training and Personnel Development, says that the need for German becomes evident when emails are forwarded – although the request to the individual is formulated in English ('Can you deal with this?') the email trail below is in German. As a result, around 150 UK staff are currently undertaking training in German. In addition, certain senior managers on a particular career path within the company are required to work abroad for 2 years, and this requires language skills. Where this involves placements in third countries, other languages come into play and intensive training is provided in languages such as French, Chinese and Malay. However, Bosch does not make language competence a requirement at the recruitment stage. The company says that this would be too limiting as regards the choice of applicants: language skills are not required at the expense of other skills the company values. However, the company recognises that those who have learnt German at school are better-placed to pick up the language quickly through the training they provide.

3.4 Which people need language skills?

The concept of the 'knowledge society' and the proposition that in a globalising, information-rich world, the labour market will require higher skills of everyone, has often gone hand in hand with policies promoting 'languages for all'.[215] However, more recent analyses of labour market developments[216] question the assumption that low-skill jobs are in decline, but point to evidence such as that provided by the Future of Work consortium that it is middle grade jobs that are disappearing, with the vast majority of jobs clustering at either end of the skill and wage spectrum. From this type of analysis, it is a short step to assuming that it would be only high skill, high wage jobs that would need language skills.

This section questions whether this assumption is correct and looks at whether it is possible to define more closely the types of people who need language skills, now or in the future, by their occupational level, job function or geographic location.

3.4.1 Occupational level
Data from both the 2009 and the 2011 National Employer Skills Surveys show that there are job vacancies which are hard to fill because of shortages of language skills across occupational grades from managers to elementary staff. As can be seen in Figure 25, they show in particular that there is no sense in which language skills are the preserve of professional or managerial grades: there are shortages of language skills in administrative and clerical work, in caring, leisure and other services, in sales and customer services and amongst elementary staff.

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215 E.g. European Commission White Paper, 'Teaching and Learning. Towards the Learning Society', 1995 <http://ec.europa.eu/languages/documents/doc409_en.pdf> [accessed 17 October 2012]. And in England: The National Languages Strategy for England: 'In the knowledge society of the 21st century, language competence and intercultural understanding are not optional extras, they are an essential part of being a citizen'. DFES, 'Languages for All, Languages for Life. A Strategy for England', 2002 www.education.gov.uk/publications/eOrderingDownload/DfESLanguagesStrategy.pdf [accessed 17 October 2012].
216 Wolf op. cit.

Figure 25: Skill shortage vacancies which are hard to fill because of lack of foreign language skills by occupational grade, 2009 and 2011
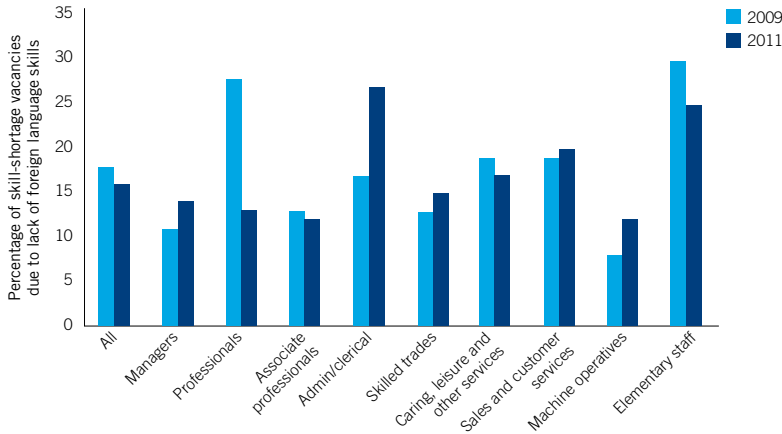
When employers were invited to identify skills areas in which their existing workforce was 'not fully proficient', the spread of deficiency again covers all grades within the workforce and is as pronounced at lower levels as in professional and managerial occupations. Figure 26 compares findings from 2009 to those of 2011 and appears to show that skills deficiencies in languages are less of a problem in the more recent survey than two years previously. However, figures from previous surveys show that 2009 was perhaps an exceptional year in terms of perception of language skill deficiencies. Findings from 2007 and 2005 show that 9% of skills deficiencies were due to lack of foreign language skills (the same level as 2011) with the 2003 figure being 7%.

Figure 26: Proportion of skills deficits identified as language skills deficits by occupational grade, 2009 and 2011
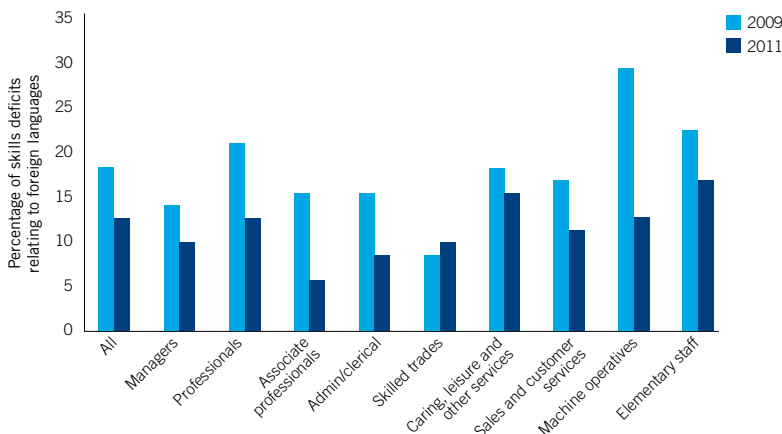
The survey of employers undertaken for this report mirrored the finding that staff at all levels use language skills: the need for foreign language skills is far from being restricted to the elite in senior management. It found that the pattern of usage of language skills is very similar for all levels of staff and that

operational staff use languages to make telephone calls, communicate by email and meet visitors just as much as senior management do – see Figure 27. It highlighted particularly that staff at all three levels use both oral and written skills.

Figure 27: Use of languages in different situations by different levels of staff
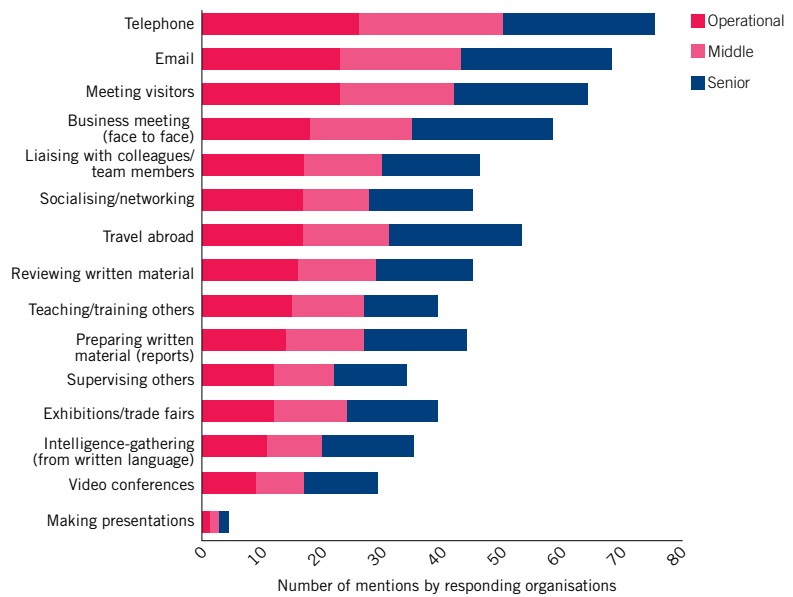
Source: Tinsley, 2013.

Although senior managers appeared slightly more likely to travel abroad, to use languages for intelligence-gathering and to prepare written material in the foreign language, the differences in overall usage of foreign languages between the different levels of staff were small:

Figure 28: Use of languages by different levels of staff
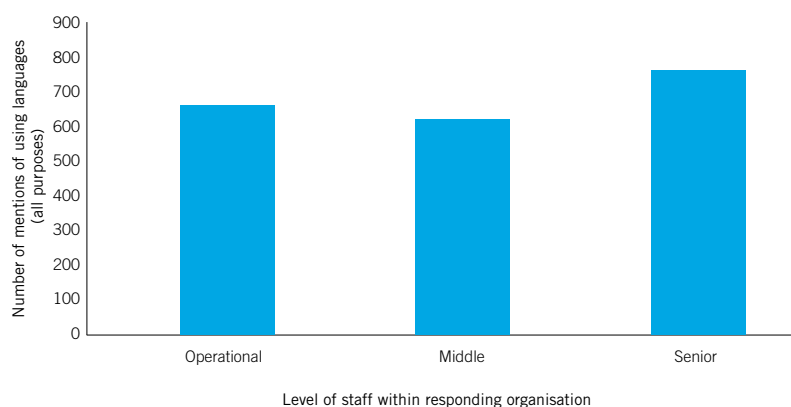
Source: Tinsley 2013.

Although middle managers appeared to use languages the least, this was not deemed to be a significant finding, because of the nature of the sample. However, the report highlighted the fact that there are generally more

operational staff in an organisation than senior managers and that therefore, in terms of the number of people within an organisation using languages, lower level staff are likely to predominate.

It is significant that the Passenger Transport sector, which reports such a high level of language skill deficits (see Figure 23), is a sector which draws substantially on staff at a low occupational level. 47% of the workforce in this sector have either Level 1 qualifications or no qualifications at all and 22% have only Level 2 qualifications – yet it is clear that foreign language skills are increasingly required at these grades. It should be noted too that 72% of those employed in the sector are male.[217] This raises significant issues for language education policy in schools and vocational training where skews towards females learning languages have already been identified (Section 2.2).

CASE STUDY: Gatwick airport

As one of the world's busiest airports, serving more than 200 destinations, Gatwick Airport is a quintessentially international environment. Its 2,200 employees have to ensure that 34 million passengers a year are transferred swiftly and safely to their destinations, minimising the stress and disorientation which so often accompanies air travel.

As part of its commitment to customer service, the Airport has instituted language training for staff in the front line of dealing with the public. Those helping passengers through security, or assisting with information to make sure people can find their way around, choose from a range of the languages most commonly needed at the airport. They learn basic language relevant to their role, such as 'liquids' or 'sharp objects' and, after successfully completing the course, their language skills are recorded so that they can be called to deal with typical communication problems which may arise. Participants are of all ages and come from a range of backgrounds: some have university degrees, others lower level qualifications. The Airport also directly employs a small number of specialist linguists, who cover a variety of languages between them. These are called to interpret when more complex situations arise. In the past the Airport simply drew ad hoc on the language skills of its employees. Now there is a much more strategic approach, with the training organised in partnership with the union, Unite.

3.4.2 Job function

Surveys of exporting companies have shown in the past that languages are most frequently used in the Sales and Purchasing departments of the business[218] and indeed, the advantage of being able to **sell** British goods abroad is frequently invoked as a reason for improving language skills. However, the employer survey carried out for this report, which included a wider range of organisations, indicated that languages are used in many other functions too, most commonly for actual service provision – the point in the business where people have to communicate directly. Examples of this in the survey includes the financial or business services sectors, transport and communications and the hotel industry. Sales and Purchasing were also important, as shown in Figure 29.

217 OCR International.
218 Stephen Hagen, *Language and Culture in British Business: Communications, Needs and Strategies* (CILT, the National Centre for Languages, 2005), p. 96 www.amazon.co.uk/Language-Culture-British-Business-Communications/dp/1904243339 [accessed 19 October 2012].

Figure 29: Frequency of use of foreign languages in different organisational functions

Number of mentions across all levels in
the responding organisations
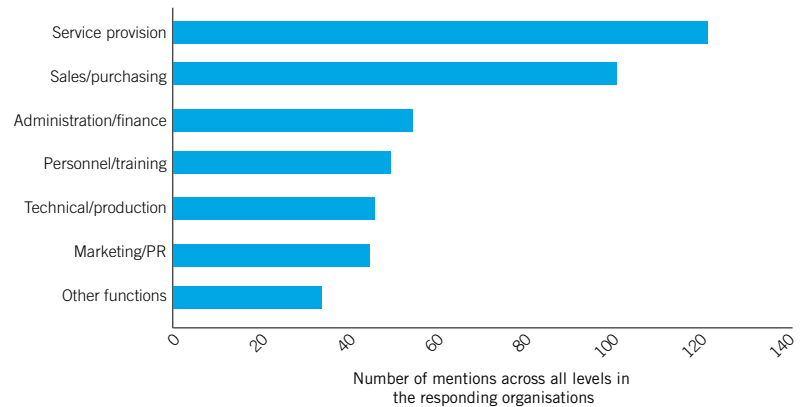
Source: Tinsley, 2013.

Languages were used least in Marketing and PR, even less than in Personnel and Training.

Analysis of job vacancies requiring languages echoes that, although such jobs involve a wide variety of roles, the highest proportions tend to involve sales and customer service – around 12% in each case (see section 3.1.2).[219] However, there are a relatively large number of jobs involving Marketing and PR. As noted earlier (section 3.3.1) this is perhaps more likely to be in specialist PR and Marketing companies, rather than in in-house Marketing and PR departments.

CASE STUDY: B&Q

B&Q is a leading home improvement and garden retailer and employs around 1,000 staff at its head office in Southampton. Although popular wisdom is that foreign languages are needed for sales and that 'you can buy in your own language', the language need in B&Q is for purchasing. By teaming up with partner companies abroad, it can buy from across the whole European market and thus gain an important commercial advantage.

The company is part of the Kingfisher group and works closely with sister operating companies in order to pool buying power from across the group. In the last two years the Southampton buying teams have started to work intensively with the French company Castorama and in doing so have found a need to use French. Services and Training Manager Mark Giles says that while senior managers might speak good English, deeper in the organisation this is not the case. The company also needs some German, Polish and Russian for similar relationships with other companies within the group.

Languages have not in the past figured in recruitment policies, although the company is starting to be more conscious of this now. The company therefore offers in-house training in French, provided by a local specialist training company. Some 50 staff are currently receiving training in French and a smaller number in other languages. This is to fulfil an immediate need, not as a general professional development opportunity or designed necessarily to assist promotion within the group of companies. Some staff already have a good GCSE or A-level French but require more business-oriented language, for example, they need to be able to talk about figures, statistics, and products in order to agree on joint deals with counterparts in France. Others are learning the language from scratch.

219 Anne Marie Graham, *Labour Market Intelligence Report – a Picture of the Jobs Market, Summer 2012.*

3.4.3 Geographic location

The 2011 National Employer Skills Survey collected data from across the UK, whereas previous surveys related only to England. However, the only data which are broken down by nation are those relating to skills gaps identified in the workforce. This shows that, whereas across the UK as a whole, and in England, an average of 9% of employers say they have foreign language skills gaps, in Northern Ireland and Wales a lower proportion do so (6% and 7% respectively). However, in Scotland, the proportion saying skills gaps in the workforce are attributable to foreign language skills gaps is slightly higher, at 10%.

Figure 30: Proportion of skills gaps identified specifically as language skill gaps, by UK nation, 2011
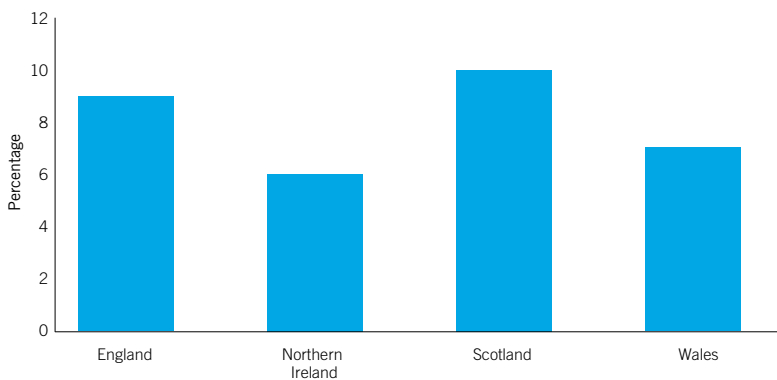
Source: UK Commission's Employer Skills Survey 2011: UK results. [220]

The 2009 survey (England only) provides a breakdown by English region – see Figure 31. This shows that the deficiencies in language skills were considered to be particularly high in London.

Figure 31: Proportion of skills deficits identified specifically as language skills deficits, by English region, 2009
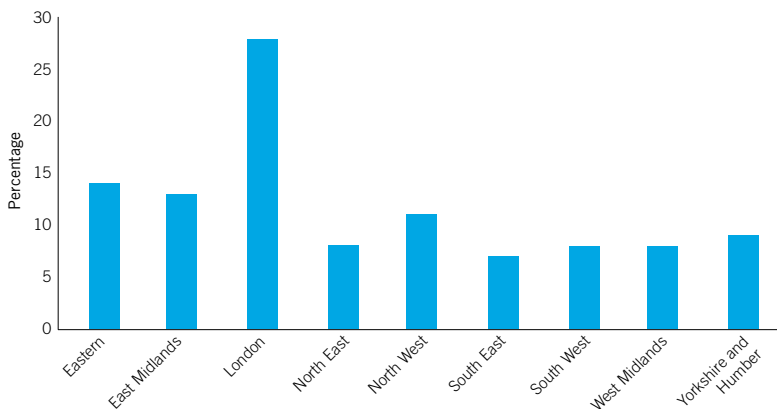
Source: National Employer Skills Survey (England) 2009.

It ought to be possible to identify the sectors which most need language skills in different parts of the country. Data are available on this from the Passenger Transport sector. Figure 32 shows that both current gaps and future needs in

220 Davies and others, op. cit.

language skills are higher in the Scottish Enterprise area, Northern Ireland and Wales than across the UK as a whole, although the East of England identifies the highest level of current deficiency and future need. Further research with employers would be needed to identify the exact nature of these gaps and needs.

Figure 32: Language skill needs in the passenger transport industry, by region/nation
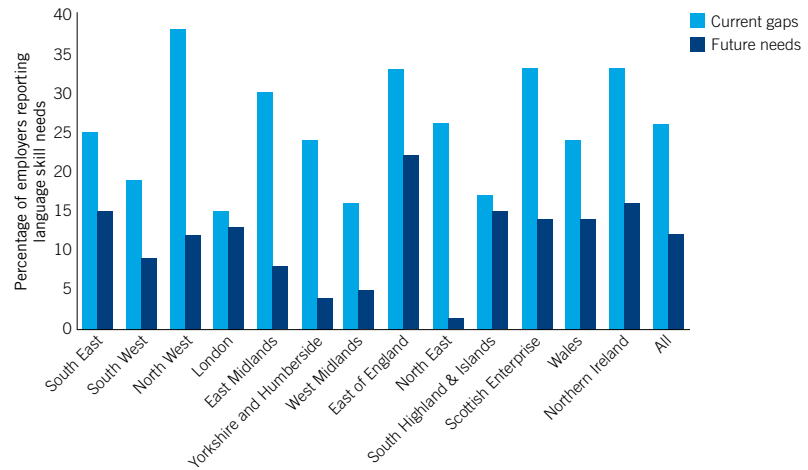
Source: GoSkills 2009.

Although the need for language skills is felt across the country, analysis of vacancies indicates that the largest proportions of jobs with languages are located in London and the South East – see Figure 33. Together these two regions account for two thirds of the vacancies logged by Graham. This of course reflects the jobs market more generally, and the share of vacancies in Northern Ireland, Wales and Scotland is therefore slightly less than would be expected based on population size alone. There has been an increase in the number and proportion of vacancies reported in the North West since the earlier 2011 research.

Figure 33: Location of language vacancies within the UK
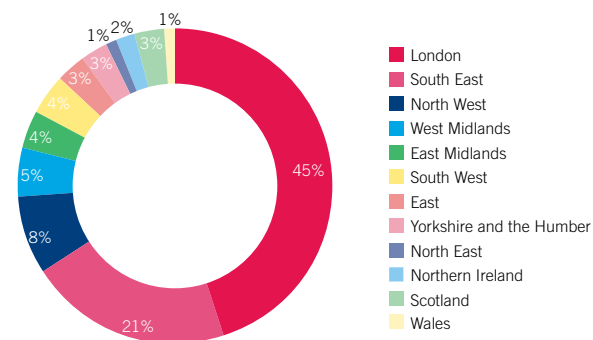
Source: Graham, 2013.

3% of the vacancies identified by Graham were located in other European countries, although there was not a straight match between the language requested and the national language(s) of the country in which the job was located. Only a fifth of language vacancies abroad asked for the language of the country in which they were located. Another 1% of language vacancies

were located in countries outside of Europe including Africa, the USA, Central America, the Middle East and Asia.

3.4.4 Summary

The analysis of data presented here confirms previous indications that languages are needed at all levels in the workforce. This message has important implications for policy on languages in education and training.

Staff in a wide variety of job roles use languages. In today's service-oriented economy languages are being used for actual service provision, not simply in the more obvious functions of sales and purchasing.

The data show that there are regional variations in England in terms of the demand for language skills and fewer job advertisements in Scotland, Wales and Northern Ireland.

3.5 Key issues emerging from this chapter

This chapter has shown that the jobs market for languages includes both explicitly articulated demand and demand which is implicit in the recruitment behaviour of employers or latent and yet to be realised. It is therefore important that measures relating to policy and provision for languages be based on this full spectrum of demand.

There is a need to stimulate explicit demand by enabling businesses to become more 'language aware' and helping them to manage language skills more effectively and strategically.

Approximately half the market for language skills is for the three languages which are most widely taught and learned in the UK – French, German and Spanish. There is also evidence of demand for a wide range of other languages in addition to these. Despite indications that the UK economy should start to tap into new rapidly-expanding markets and become less dependent on mature European economies, the vast majority of current need is still for European languages.

Languages are used in all sectors of the UK economy, and in the public and voluntary sectors as well as private business. A number of industries have been identified where there is an above average or increasing need for language skills; more research in collaboration with these industry sectors is needed to plan how this should be delivered.

Language skills seem to be needed at all levels in the workforce, and not simply by an internationally-mobile elite. This represents a challenge for language education policy.

Although most jobs with languages are in London and the South East of England, the evidence linking language skills to improved business performance and penetration of new markets is relevant to all the regions and parts of the UK. All have a need for language skills since they all wish to achieve growth through improved skill levels, international engagement and foreign direct investment. There may be a particular need to stimulate explicit demand for language skills outside London and the South East. In order to develop a more strategic approach to language skills development, all parts of the UK must consider their own sectoral strengths and key target markets. For example, Wales may wish to focus on its top five export industries – Metals, Energy, Chemicals, Engineering

and Automotive, and identify the languages associated with the key markets for those goods, whereas Scotland's top export industry is Food and Beverage, which may imply a different target market and language requirement.[221]

221 'Scottish Key Facts January 2012 | An Overview of the Scottish Economy and Key Sectors | Scottish Enterprise', 2012 www.scottish-enterprise.com/Resources/Publications/STUV/Scottish-key-facts-January-2012.aspx [accessed 1 January 2013].

Chapter four

UK capacity in foreign languages

This chapter follows a similar structure to Chapter 3, which looked at the demand for language skills, in order to facilitate comparisons which will be discussed further in Chapter 5. It will consider:

- the overall availability of language skills
- the levels at which language subjects are being studied
- the range of languages available
- their distribution within the population
- combinations of languages with other subjects at school and university level.

4.1 How extensive is the supply of language skills?

This section covers:

- Language skills within the adult population
- Language learning and trends in higher education
- Language learning in schools
- Participation and achievement in school exams in the 4 parts of the UK
- Language learning in primary schools
- Teacher training.

4.1.1 Language skills within the adult population
The Eurobarometer survey conducted on behalf of the European Commission in early 2012 interviewed a representative sample of adults aged 15 and above in each member state.[222] The findings are based on nearly 27,000 face to face interviews in 27 countries. Interviewees were asked which languages they spoke well enough in order to be able to have a conversation. As shown in Figure 34, in the UK 39% claimed to be able to speak at least one language besides their mother tongue, compared to an average of 54% across 27 European countries. For the UK this represents a very slight increase on the 2006 Eurobarometer finding that 38% of the population had skills in a language other than their mother tongue enough to be able to conduct a conversation. However in 2006, 8% of the UK sample had a language other than English as their mother tongue and in the 2012 sample 10% did so. The figures indicate that other mother tongues – as opposed to languages taught in school – may account for around one quarter of language skills capacity within the UK population.

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222 European Commission, *Europeans and Their Languages. Special Eurobarometer 386*, 2012.

Figure 34: Number of languages spoken in addition to mother tongue (% of respondents, self-reported)
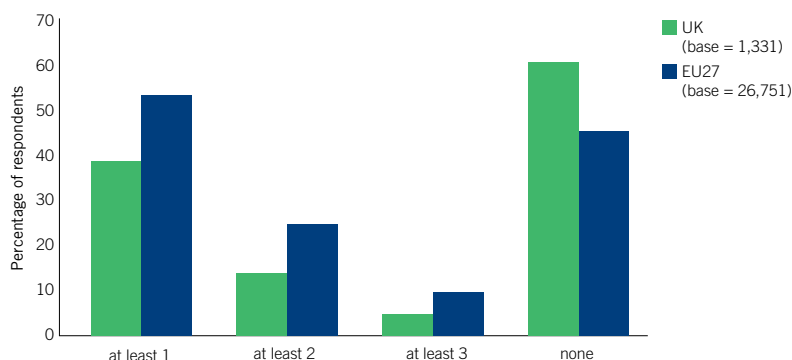
Source: Special Eurobarometer 386, 2012.

School censuses in England, Scotland, Wales and Northern Ireland have shown that there are an increasing number of schoolchildren who speak another language at home besides English. The way this question is framed in the different parts of the UK slightly varies and so may not give exactly comparable results, but the proportions reported are shown in Figure 35:

Figure 35: Proportion of primary and secondary schoolchildren with English as an Additional Language (in NI, 'newcomers')
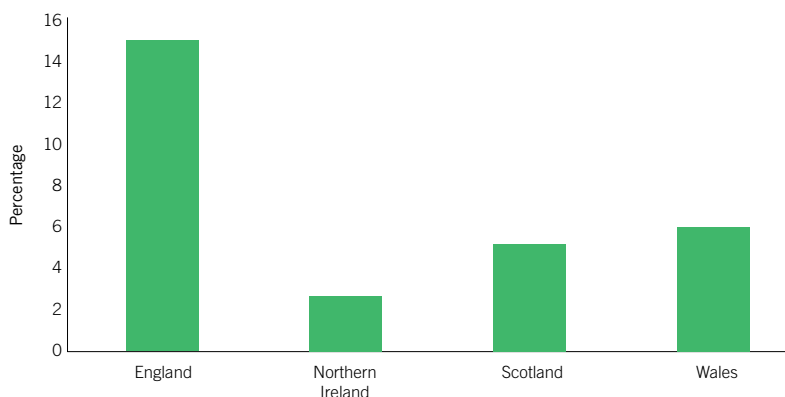
Sources: DfE;[223] DENI;[224] National Statistics;[225] Welsh Assembly Government.[226]

These data show that the UK has a rich base of inherent multilingualism on which to draw in the future. However, such skills need encouragement and development in a wider range of contexts in order to be of benefit to the wider society once children grow up. A young child's ability to speak a language in the home does not 'naturally' develop into competence appropriate for use in working contexts in later life.

From these pupil data it is possible to gain an idea of the language skills that might be available in the adult population. The results of the 2011 UK Census will provide much more reliable information on this.

223 DfE, 'Maintained Primary and Secondary Schools. Number and Percentage of Pupils by First Language', 2012.
224 DENI, 'Newcomer Pupils' www.deni.gov.uk/index/32-statisticsandresearch_pg/32-.
225 National Statistics, 'Pupils in Scotland 2011. Main Home Language.', 2011.
226 Welsh Assembly Government, 'School Census', 2010 <http://wales.gov.uk/topics/statistics/headlines/schools2011/110906/?lang=en>

The Eurobarometer survey also asked whether respondents were currently learning, or intending to learn a language. As can be seen from Figure 36, as many as 26% of UK adults may be engaged in improving, or at least intending to improve their language skills (8% + 9% + 9%). This compares reasonably well with the EU average of 29% (8% + 14% + 7%).

Figure 36: Language learning behaviours and intentions (UK compared with the EU average)
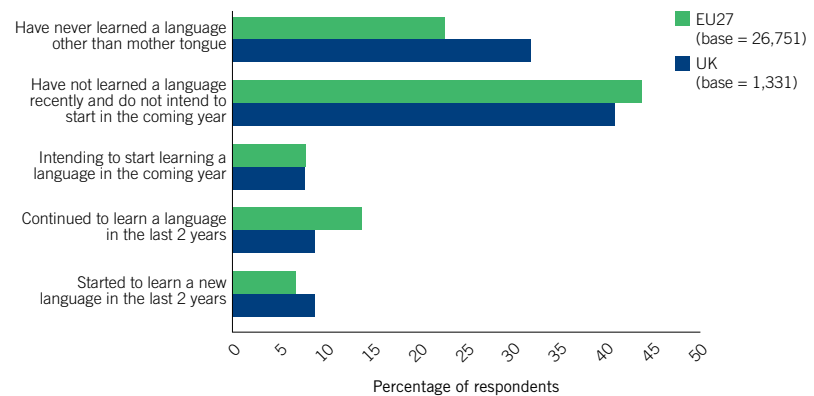
Source: Special Eurobarometer 386, 2012.

UK respondents to the survey show generally positive attitudes to language learning, although a little less so than the average across all countries. For example 72% of UK respondents agreed with the statement that 'Everyone in the EU should be able to speak at least one language in addition to their mother tongue' (EU average 84%) and 69% agreed that 'Improving language skills should be a policy priority' (EU average 77%).

4.1.2 Graduates
This section looks at:

- the proportion of undergraduates studying languages in relation to other subject areas
- the number of individuals that this involves
- trends in numbers over the last decade.

Proportion of undergraduates
Figures from the Higher Education Statistics Agency (HESA), based on calculations of 'full-time equivalent' numbers, show linguists accounting for 3% of undergraduates in the academic year 2010/11 (Figure 37). This share has remained unchanged since 2001/2, while the share of Arts, Humanities and Social Sciences has risen from 66% to 71% and STEM has declined from 27% to 23%.

Figure 37: Proportion of undergraduate students grouped by HESA cost centre. 2010–11

- Clinical subjects
- STEM
- Modern foreign language
- Arts, humanities and social sciences
- Cost centre unassignable
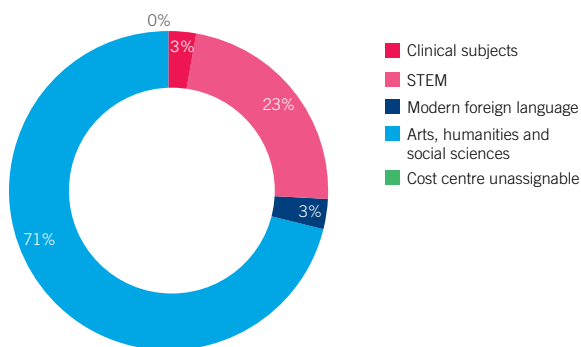
Source: HEFCE analysis of HESA data.[227]

Numbers of undergraduates

Analysis of more fine-grained data supplied by HESA for this report provides information on the number of undergraduates studying a language as part of their degree and the trends over the last 4 years (Figure 38). However, there are certain caveats concerning the quality of the data, which are discussed in some detail in Appendix 3.

Figure 38: Numbers studying languages in UK higher education institutions at undergraduate level, 2007/08 to 2010/11

	2007/8	2008/9	2009/10	2010/11
Other undergraduate	21584	19001	22386	19409
Total first degree	26581	27567	28318	28054
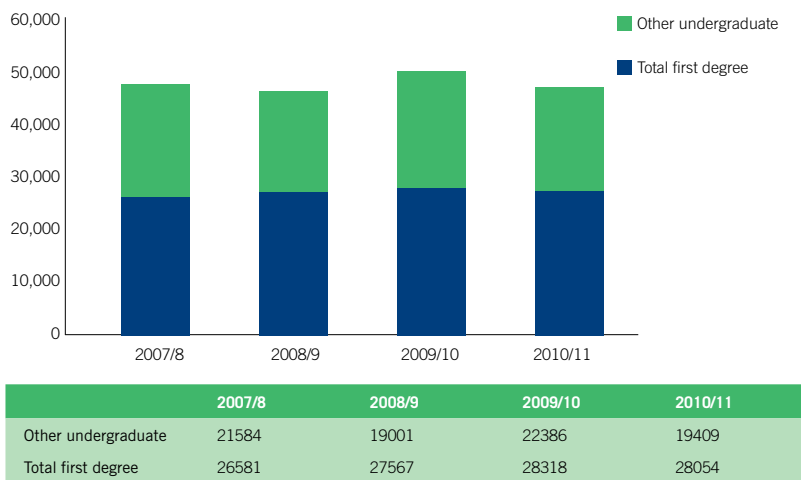
Source: HESA student record.[228]

This analysis shows that the total number of individuals reported as studying languages at undergraduate level in UK higher education institutions over the last four years for which data are available is as follows:

2007/8	2008/9	2009/10	2010/11
48,165	46,568	50,704	47,463

Taking into account that this figure includes undergraduates in all years of study, this gives a total of between 11,000 and 15,000 individuals per annum

227 HEFCE, 'Data on Demand and Supply in Higher Education Subjects', 2012 www.hefce.ac.uk/data/year/2012/dataondemandandsupplyinhighereducationsubjects/ [accessed 2 January 2013].
228 See Appendix 3.

who can offer language skills potentially entering the labour market. HESA data on the domicile of undergraduate students indicates that currently around 10% of these are likely to be from other EU countries and a further 7% are other international students.

In addition to these, there are two categories of university student potentially studying languages for which statistics are not available. These are:

- Those studying a language as an accredited part of their degree, but whose participation is not recorded by their university in returns to the Higher Education Statistics Agency
- Those studying a language as an extra-curricular or unaccredited additional subject whilst at university.

See Appendix 3 for further discussion of this.

Trends

Analysis undertaken by HEFCE (referring only to English higher education institutions) shows that over the 10 years since 2001/02, the numbers of full-time equivalent undergraduate students of languages have increased by 1%. This compares to an increase of 18% across all subjects. However, the increase of 1% comes from increases in the proportions of EU and international students. The number of UK domiciled undergraduates taking language courses has dropped by 5%. A very similar situation exists for Science, Technology, Engineering and Maths (STEM) subjects, as can be seen from the table below:

Figure 39: Number of full-time equivalent undergraduate students in English higher education institutions by domicile and HESA cost centre

		2001/2	2010/11	Difference
Modern foreign languages	UK	24,273	23,178	-5%
	EU	2,416	2,774	15%
	Other international	1,054	2,068	96%
STEM	UK	223,068	212,681	-5%
	EU	12,665	14,467	14%
	Other international	19,675	32,284	64%
All subjects	UK	843,646	959,404	14%
	EU	44,266	58,149	31%
	Other international	55,072	98,198	78%

Source: HEFCE analysis of HESA data.

As with STEM subjects, EU and international students make up a relatively high proportion of student numbers, compared to averages across all subjects, but languages are unusual in that EU undergraduates represent a higher proportion of the total than other international students:

Figure 40: Proportion of full-time equivalent undergraduate students in English higher education institutions by domicile and HESA cost centre, 2010/11
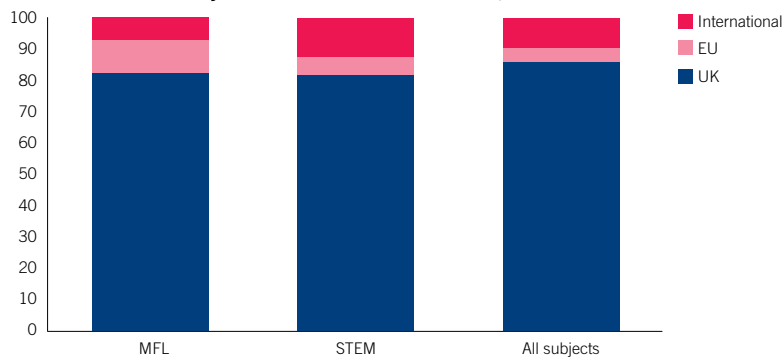
Source: HEFCE analysis of HESA data.

These data clearly show why languages and STEM subjects are designated as vulnerable in the English higher education sector. The picture would no doubt have been much worse without the demand-raising programmes funded by HEFCE as a result of the subjects' designation as 'strategically important and vulnerable'.

Data supplied by UCAS on individuals accepted to undergraduate courses give some idea of year on year trends. Although it does not capture many linguists subsumed into 'unknown and combined subjects', it shows that acceptances for language degrees reached their lowest point in 2006/07, after which they rose for two years before levelling off and starting to fall again:

Figure 41: UCAS acceptances for language degrees, 2002/03 to 2011/12
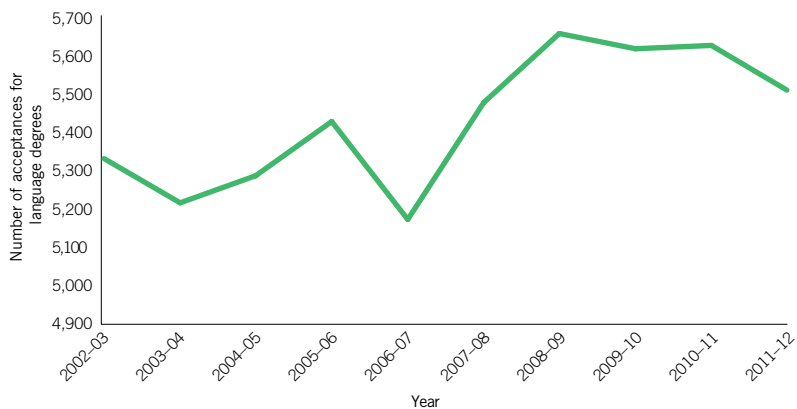
Source: HEFCE analysis of UCAS data.

Data for 2012 show that, while acceptances for all subjects declined, those for language subjects were dropping much more than the average. The drop in applications for non-European languages is of particularly serious concern:

Figure 42: UCAS acceptances 7 days after A-level results, difference between 2011 and 2012
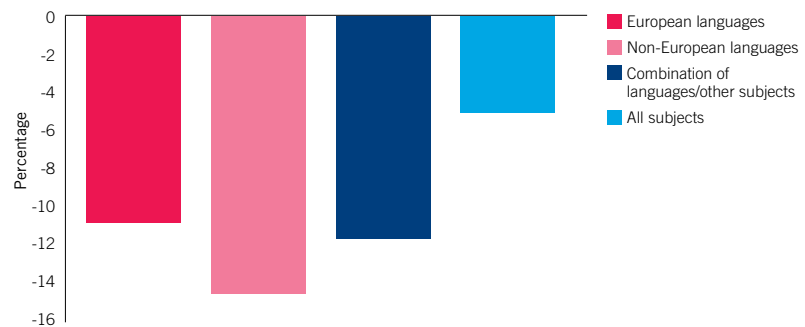
Source: UCAS.[229]

As was noted by Professor Worton, an overall decrease can include quite substantial percentage *increases* in small entry subjects. In this case, numbers for 'Other Asian studies' and 'Combinations with non-European languages' have increased, although the numbers are not large enough to have an impact on the overall trend.

4.1.3 Upper secondary

This section looks at the state of play for languages in the school system, which provides the pool of entrants to university courses. The focus is on 'advanced level language skills' by which is meant Level 4 on the European Qualifications Framework which is equivalent to A-level in England, Northern Ireland and Wales, and Highers in Scotland.

Participation

Figure 43 shows the proportion of learners sitting a qualification at this level in a language as a percentage of the total number of entries at this level in England, Northern Ireland, Scotland and Wales in all subjects in 2012. Of the different parts of the UK, Wales has the lowest proportion of learners attempting a language qualification at this level excluding Welsh (3.3%) but the highest proportion if Welsh is included (5.6% – including Welsh both as a first and a second language). Entries for Irish in Northern Ireland and Gaelic/Gàidhlig[230] in Scotland are not numerous enough to change the proportion of language entries overall; both have higher proportions of candidates attempting a language qualification at this level than does England. For comparative purposes, the proportion of entries for Mathematics – a subject with one of the highest numbers of entries – in England, Scotland, Wales and Northern Ireland is also shown.

229 'UCAS Applicant Statistics 23 August 2012' www.ucas.ac.uk/about_us/media_enquiries/media_ releases/2012/20120823.
230 Those who learn the language as a curriculum subject in an English-medium school sit 'Gaelic' while those who have learned through the medium of Gaelic sit 'Gàidhlig'.

Figure 43: Level 4 qualifications attempted in Languages and Maths as proportions of all subject entries
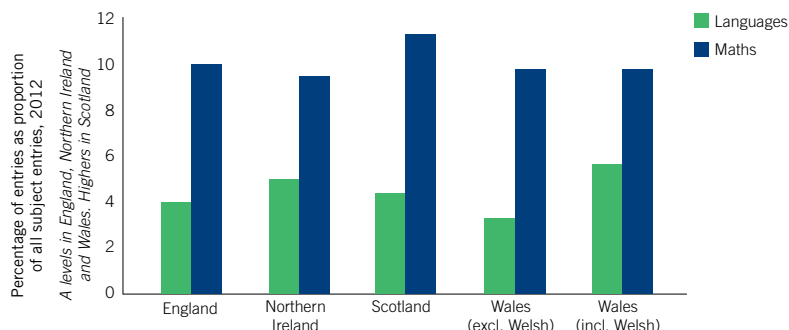
Sources: JCQ[231] and SQA.[232]

Entry figures tell us about participation but not about achievement: it should be borne in mind that pass rates for A-levels (A–E grades) are very high (around 99% in 2012, and for Maths slightly below this at 97.7%), whereas in Scotland the pass rate for Highers in foreign languages in 2012 was 82.8% and for Maths only 73.3%.

Numbers attempting and passing the Scottish Baccalaureate in Languages, introduced in 2009, are still very low. This is attributable to some schools removing the option to study a 3rd or 4th language lower down the school, thus creating a barrier to entry. In 2012 there were 34 entries and 26 passes compared with 36 entries and a slightly higher pass rate than in 2011. 56 students attempted the Interdisciplinary project in Languages, of which 53 were successful.

Trends

In England, Scotland and Wales, the proportions of languages entries in relation to total entries for all subjects have declined over the past 3 years, while in Northern Ireland they have risen slightly. In Wales and England this has involved a numerical decline in language entries at A-level, whereas in Scotland numbers have risen and in Northern Ireland they have remained steady – see Figure 44. This situation hides some more marked changes in particular languages, as discussed in section 4.2. The 19% drop in foreign language entries in Wales indicates a very rapid decline in these subjects in Welsh schools.

Figure 44: Trends in Advanced language entries over the last 3 years

	2009	2010	2011	2012	% difference 2009–2012
England	32,541	31,685	32,397	31,207	-4%
Northern Ireland	1,641	1,752	1,602	1,638	0%
Scotland	7,687	7,746	7,277	7,744	3%
Wales (excluding Welsh)	1,521	1,307	1,255	1,230	-19%
Wales (including Welsh)	2,462	2,168	2,171	2,089	-15%
TOTAL (excluding Welsh)	43,390	42,490	42,531	41,819	-4%

Sources: JCQ[233] and SQA.[234]

231 JCQ, *Results 2012 – Provisional GCE A-level Results June 2012*, 2012.
232 Scottish Qualifications Authority, 'National Course Results Statistics 2012 (Pre-appeals)', 2012.
233 JCQ op. cit. and JCQ, 'Results 2010 – Provisional GCE A-level Results June 2010', 2010.
234 SQA op. cit. and SQA, 'Annual Statistical Report Tables 2009, 2010, 2011'.

In comparing the total figures quoted above with data from higher education or other subjects, it should be borne in mind that students taking more than one language at A-level (perhaps those most likely to go on to study languages at university) will be double counted.

Regional differences in England

As shown in Figure 45, London and the South East account for a large proportion of A-level language entries and the numbers of students studying languages at this level in the North East are very small indeed – equivalent to only 3% of all language entries, although the North East represents a 5% share of the English population. London and the South East are the only regions which have a larger share of language entries than would be expected for their population size.

Figure 45: A-level entries in languages by English region, 2011
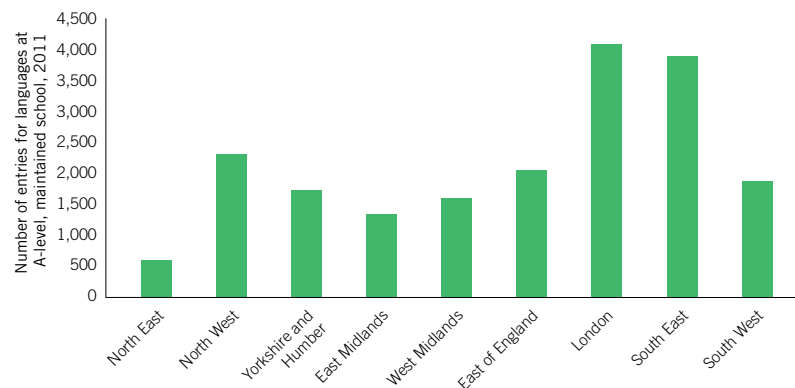
Source: DfE.[235]

Progression rates

The size of the pool of candidates available to progress to advanced level studies depends on participation and achievement lower down the school, and this is examined in paragraph 4.1.4. However, the *rate of progression* is also a concern and there has been some research into this in England. A report for the DfE in 2012 looked at progression rates from GCSE to AS in 11 subjects and found that French, German and Spanish had the lowest progression rates of all at 13%, 12% and 19% respectively. Biology had the highest progression rate, at 36%. Only 9% of pupils taking French to GCSE progressed to A-level (A2)[236] – see Figure 46.

Figure 46: Proportion of pupils obtaining A*–C at GCSE progressing to AS and A-level, by subject
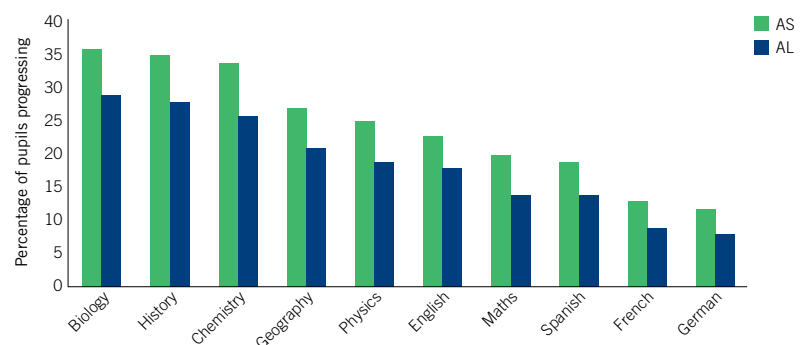
Source: DfE, Subject Progression from GCSE to AS-level and Continuation to A-level, 2012.

235 GCE A-level examination results of 16–18 year olds by Local Authority and subject, 2010/11.
236 DfE, 2012, Subject progression from GCSE to AS and continuation to A-level.

The 2011 Language Trends survey explored teachers' views on low take up of languages at A-level. Teachers from both independent and state secondary schools felt this was related to the nature of the assessment regime at both GCSE and A-level, harsh and sometimes inconsistent grading at A-level, the timing of the AS exam coming so swiftly after GCSE and the relative lack of A stars given in languages. There was also a perception in some schools that languages were losing out to Science and Maths in the context of successful campaigns to promote these subjects.[237]

4.1.4 Lower secondary

This section looks at participation and achievement in language learning at lower secondary level, as measured by exams typically taken at age 15–16.

Participation

Figure 47 compares entries in lower level language qualifications across the different parts of the UK in relation to the proportion of entries in all subjects. In England, Northern Ireland and Wales, figures are based on GCSE entries. In Scotland where the exam system is in transition, figures include exams typically taken at the end of compulsory education – Access 3, Standard Grade, and Intermediate 1. Because of the differences between education systems, this only produces a very rough comparison. Figures for each part of the UK also include numbers taking these examinations at other stages in the education system and in adult education.

Figure 47: Entries for languages GCSE qualifications in England, Northern Ireland and Wales, and comparable qualifications in Scotland, as a proportion of all subject entries, 2012
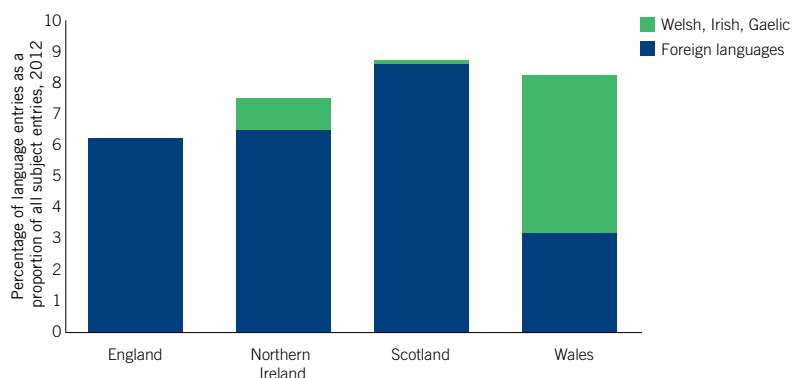
Sources: JCQ[238] and SQA.[239]

As is the case with A-level languages entries, the situation is complicated by the bilingual situation in Wales, where the majority of language GCSEs are for Welsh, either as a first language or a second language.[240] As shown in Figure 47, Wales has the lowest proportion of foreign language entries – just 3.2% of all GCSE entries in Wales. In Northern Ireland, around 1% of A-level entries are for Irish and the proportion taking a foreign language (6.5%) is similar to England (6.2%). In Scotland only around 0.1% of students take Gaelic/ Gàildhlig at this level, but the overall proportion taking a language at this level is the highest in the UK at 8.7%. In England – and to a lesser extent in Northern Ireland and Wales – pupils also take GCSE short courses and alternative

237 Tinsley and Han.
238 JCQ, *Results 2012. Provisional GCSE (Full Course) Results – June 2012*, 2012.
239 Scottish Qualifications Authority, op. cit.
240 See introduction for a discussion of the way in which Welsh, which for many children is a new language learned in school for the first time, skews figures for language learning.

qualifications to GCSE such as Asset Languages, NVQ language units and the Foundation GCSE. These are not included as statistics are difficult to obtain. However in 2011, one third of schools offered languages accreditation other than GCSE and A-levels to some groups of pupils. This had declined from 45% the previous year as a result of their not being recognised for the English Baccalaureate and changes to performance tables.[241]

Trends

As shown in Figure 48, all parts of the UK have seen recent declines in the numbers of students taking lower level qualifications. Once again Wales has suffered the most severe decline – 20% over the 3 years. This figure excludes Welsh, in which numbers have only declined by 3%, in line with the overall number of entries. In England, overall entries have declined by 4% during the period, in Northern Ireland by 7% and in Scotland by 6%.

Figure 48: Trends in GCSE/Standard Grade entries 2009–2012
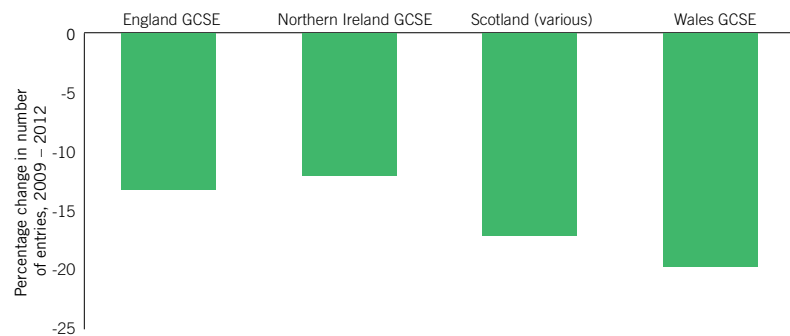
Sources: JCQ[242] and SQA.[243]

In England there have been recent indications that the introduction of the English Baccalaureate as a performance measure for schools has started to boost numbers studying languages at Key Stage 4. A survey for the Department for Education (DfE) in June/July 2011 found that 52% of Year 9 pupils were going into GCSE languages classes the following school year[244] – this compares with 40% of the Year 11 cohort who took the exam in the same year.[245] A survey of language departments in autumn 2011 confirmed that a much higher proportion of schools had over 50% of the cohort studying a language in Year 10 than in the previous year. The uplift was especially evident in schools with higher proportions of children in receipt of free school meals (an index of social deprivation) and in the middle and lower bands of educational achievement[246] – see section 4.4.1 for further discussion of this. However, a more recent analysis indicates that the increase may have been attributable to schools channelling highly targeted groups of prospective pupils into language courses and may not result in a sustained trend, reaching larger number of pupils in future years.[247]

In Wales, numbers obtaining the Welsh Baccalaureate have been rising. In 2012, 8,259 students obtained the Advanced award (Level 3) and 7,210 the Intermediate award at Level 2. However Estyn, the Welsh inspectorate for education, has noted in its latest report that standards in the 20 hour

241 Tinsley and Han. op. cit.
242 JCQ op. cit. and JCQ, 'Results 2010. Provisional GCSE (full Course) Results June 2010', 2010.
243 Scottish Qualifications Authority op. cit.
244 Clemens.op. cit.
245 Tinsley and Han.op. cit.
246 ibid.
247 Helen Greevy and others, *The Effects of the English Baccalaureate. Research Report DfE-RR249*, 2012.

language module, which all students must take, are 'not challenging enough to engage students'.[248]

Achievement

As noted above, there are a number of difficulties in producing comparable data on languages for the different education systems within the UK. In addition, although the number of entries for language subjects is low compared to core subjects like Mathematics, the pass rate is relatively high. This next section therefore compares achievement (rather than participation) at Level 3 on the European Qualifications Framework (equivalent to Level 2 on the National Qualifications Framework in England, Northern Ireland and Wales, and Level 5 on the Scottish Credit and Qualifications Framework) as a proportion of similar **achievement** in all subjects in 2012. The qualifications in question are GCSE grades A*–C in England, Northern Ireland and Wales, and, in Scotland, Standard Grade Credit Level (grades 1 & 2) and Intermediate 2. Comparisons with the proportions of passes in these qualifications at the same level in Mathematics in each of the different parts of the UK are also shown in Figure 49:

Figure 49: Passes at Level 3 on the European Qualifications Framework
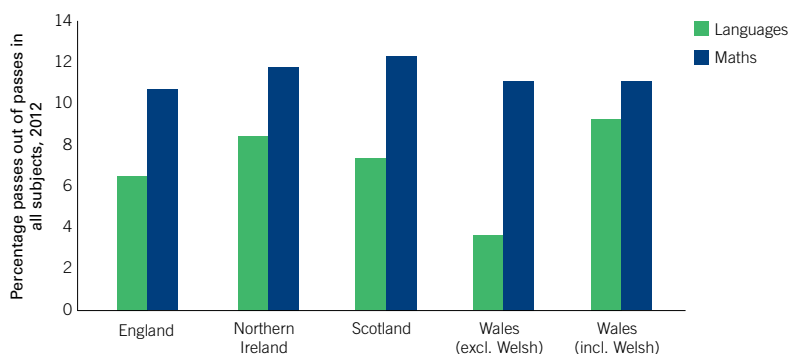
Sources: JCQ and SQA.[249]

Maths is a particularly good comparator as it is a compulsory subject at this level, taken by the majority of children. However, in the case of languages, pupils who take more than one language will be counted twice, so the number of entries is not equal to the number of pupils. However, the gap between entries for Maths as a compulsory subject and languages, which are optional, is clear.

As can be seen, Northern Ireland produces the highest proportion of foreign language passes at this level. Northern Ireland is also the UK nation with the highest proportion of foreign language entries at advanced level.

4.1.5 European Survey on Language Competences

The European Survey on Language Competences, published in 2012, provides the first international measure of language learning outcomes in education systems – comparable with international surveys for other types of achievement such as PISA.[250] The survey tested 14–15 year old pupils in 14 countries, including England, on the level of competence reached in the first and second foreign languages taught in their education system using the Common European Framework of Reference for Languages (hereafter CEFR[251]) as a yardstick.

248 Estyn, 2012. Welsh Baccalaureate qualification provision at level 3 in secondary schools.
249 Op. cit.
250 European Commission, *First European Survey on Language Competences. Final Report.*
251 Council of Europe. op. cit.

Previously English National Curriculum levels and qualifications had been mapped against the CEFR, as shown below. Equivalent Scottish qualifications are also given:

Figure 50: Common European Framework of Reference for Languages with English and Scottish Equivalent qualifications

CEFR level	Definition	English qualification	Equivalent Scottish qualification
A1	A basic user who can use very simple language, with support	Entry levels 1–3	Access 3
A2	A basic user who can use simple language to communicate on everyday topics	Entry levels 1–3 GCSE foundation tier	Intermediate 1 Standard Grade (foundation/general)
B1	An independent language user who can deal with straightforward, familiar matters	GCSE (higher tier)	Intermediate 2 Standard Grade (credit)
B2	An independent language user who can express him/herself clearly and effectively	AS/A2	Higher

Source: CILT, Languages Yearbook 2004.

The results of the survey provide for the first time an external measure of actual levels of language competence achieved by pupils in relation to these levels.

The survey tests were taken in England by Year 11 pupils studying a language in autumn 2011. 1,444 pupils took the tests in French – covering Listening, Reading and Writing – and 1,428 in German. The results, with comparisons from France and Spain (Germany did not participate) and the average across all participating countries are shown in Figures 51 and 52. It should be borne in mind that in all other participating countries except England, a foreign language is compulsory for all students in the age group being tested. Therefore the results in Figure 51 relating to other countries represent achievement for the whole cohort. In England, participation in language learning in Year 11 – and therefore the achievements recorded – represent less than half of the cohort.

Figure 51: Proportions of students achieving CEFR levels in the first foreign language taught (in England, French; in France, Spain and most other countries, English)
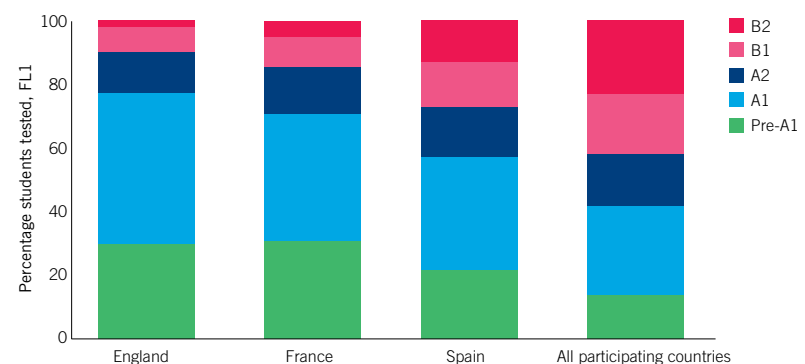
Source: European Survey on Language Competences, 2012.

As shown in Figure 51, achievement of pupils in England was worse than other countries, with fewer pupils achieving the highest levels of competence, and many more achieving only A1. It is of particular concern that 30% of pupils – the majority of whom would be due to take their GCSE in French in

the same academic year in which they were tested, did not even achieve the A1 standard ('a basic user who can use very simple language, with support'). Only 9% achieved B1 level or higher – the level supposedly associated with A*–C at GCSE. In fact, England's results were worse than any other country for achievement in the first foreign language, and France (with a very different education system) came second from bottom. The average results across all participating countries were much higher, although still a cause for concern to the European Commission.[252] Countries like Sweden, Malta and Netherlands, where English often functions as a second rather than a foreign language, achieved very well and boosted the overall average. For this reason France and Spain were chosen as comparator countries for the purposes of this report.

Figure 52 shows the results in the second foreign language, where the role of English is not part of the equation and – some may say – the achievement of pupils in England is more comparable to those learning foreign languages in other countries. In France pupils were tested on Spanish and in Spain on French. In England, German was chosen as the 'second foreign language'. However, it must be borne in mind that in most other countries English is compulsory as the first foreign language and that therefore the results represent pupils being tested on the second foreign language that they are learning. In England the 'second foreign language' was taken to mean the second 'most widely taught language(s) measured by the number of pupils taking GCSEs (in them) in 2008.'[253] Therefore in England pupils could have been expected to reach similar standards in German as in French (indeed, the A*–C pass rate at GCSE is higher for German than for French).

In fact English pupils tested did slightly worse in German than in French, with only 6% obtaining level B1 or above. As with French, 30% failed to achieve any measurable level at all. However, England was not bottom of the table on the second language measure – both Poland (testing German) and Sweden (testing Spanish) achieved worse results. Both France and Spain did much better on the test of their second language, possibly reflecting the relative ease with which pupils can acquire skills in a language which is more similar to their own.

The results are also broken down by skill. For English pupils, Listening skills emerged as the weakest in French, and Reading was the weakest skill in German. In future surveys, it is intended to develop ways of testing Speaking skills as well.

Figure 52: Proportions of students achieving CEFR levels in the second foreign language taught (in England, German; in France, Spanish; in Spain, French)
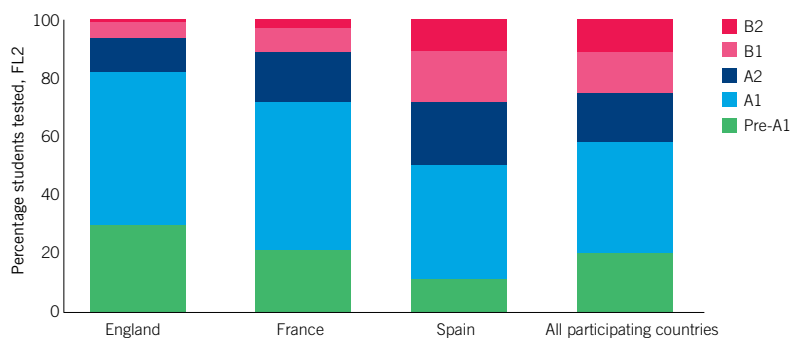
Source: European Survey on Language Competences, 2012.

252 European Commission, *Rethinking Education: Investing in Skills for Better Socio-economic Outcomes. Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions*, 2012.
253 B. Burge and others, 'European Survey on Language Competences (ESLC): Initial Findings', (Department for Education, 2012).

In response to the survey findings, the European Commission has drawn attention to the very low levels of foreign language competence being achieved by pupils towards the end of compulsory education, which are a long way from the ambition to create a multilingual workforce able to reap maximum advantage from the Single Market. The intention is to repeat the exercise every 5 years, and discussions are under way to set a European benchmark for improving language competence.

For England, the exercise has been a salutary one. It provides evidence of what many teachers, pupils and employers may already have suspected – that the majority of students in GCSE classes are only reaching a very basic level, and that many do not even reach this. It suggests that GCSE A*–C is not in fact comparable with CEFR B1 and explains why even able students find the move from GCSE to A-level difficult. Teachers responding to the Language Trends survey felt the predominance of GCSE was skewing teaching and the focus on exam syllabuses was detrimental to deeper learning.[254] Ofqual's analysis of the arrangements for controlled assessments for languages confirms this.[255] The Government had made clear its intention to replace GCSEs in academic subjects with 'English Baccalaureate certificates providing an opportunity to recast exams to reflect genuine achievement in language learning[256] – however, this is now under review.

Although only England took part in the European survey, the results also provide food for thought for the rest of the UK. Both Wales and Northern Ireland rely on the GCSE to measure language skills learned at school and must also consider to what extent it encourages the development of high standards in language learning. It seems to explain the dissatisfaction articulated by employers across the UK as regards language skills of school leavers. In Scotland, the question must be asked whether Scottish exams are robust enough, and the Scottish Government may wish to consider whether to take part in the European survey in future.

4.1.6 Languages in primary schools
There have been recent policy developments to expand and embed the teaching of languages in primary schools in both England and Scotland.

In England, the most recent national survey of provision dates back to 2008.[257] This found that 92% of primary schools were teaching a language to pupils within class time and that 69% were doing so across all 4 years of Key Stage 2 starting at age 7. Now that the Government has announced its intention to make the subject compulsory from 2014, new research is to be carried out to assess the extent to which schools are confident of being able to implement this requirement. This research is currently under way and will be available for reporting in the next *State of the Nation* report.[258]

In Scotland, a survey of primary schools in 2011 found that the vast majority (over 90%) teach a foreign language in Year 6 and Year 7 of primary school, with smaller proportions starting earlier. 13% of responding schools start teaching a language from the first year of primary school.[259]

254 Tinsley and Han op. cit.
255 Ofqual, *Controlled Assessment in Modern Foreign Languages*, 2012.
256 Department for Education, 'Reforming Key Stage 4 Qualifications', 2012.
257 Pauline Wade, Helen Marshall and Sharon O'Donnell, *Primary Modern Foreign Languages Longitudinal Survey of Implementation of National Entitlement to Language Learning at Key Stage 2*, 2009.
258 Language Trends survey of primary schools being carried out by CfBT in conjunction with ALL and ISMLA
259 SCILT op. cit.

4.1.7 Summary

The evidence in this section shows that the UK population is proportionately less competent in foreign languages than its European counterparts, but professes to have positive attitudes towards improving its record.

Languages are indeed very vulnerable in higher education and likely to become more so. Although actual numbers have held steady and increased in some subjects, proportionately those studying languages account for a declining share of student numbers. Early evidence shows that language degrees may have suffered more than other subjects from the decline in applications in 2012 as a result of the change in the fees regime.

The position of languages in schools indicates that this vulnerability will be ongoing. Foreign language learning at school level is problematic in all parts of the UK, and of very serious concern in Wales. Across the UK as a whole, declining number of learners are opting to take language subjects beyond the compulsory phase and, in England, achievement has been demonstrated to be poor in relation to internationally-recognised measures of competence. More positive indications are provided by stable and slightly increasing participation at A-level/Highers in Northern Ireland and Scotland respectively, and by the fillip to numbers taking GCSE language courses in England provided by the English Baccalaureate.

Although all parts of the UK are suffering declines, the curriculum arrangements for languages, and the degree of 'competition' from other subjects, are somewhat different. Changes to curriculum and/or assessment arrangements across the UK have exacerbated the general tendency for large numbers of students to be reluctant to take a language if not compelled to do so. Policymakers have either underestimated the extent of this reluctance (which appears not to be pure disaffection but linked to the way the subjects are taught and assessed) or have been content to see only a minority of students gain a grounding which would enable them to progress further.

The availability of international comparisons has further questioned the effectiveness of provision and assessment arrangements at school level in England – also impacting on Wales and Northern Ireland where the same systems are in use.

4.2 In which languages do people have foreign language skills?

This section covers:

- languages which are spoken by UK adults
- languages which are present in the school population
- the availability of courses in different languages
- take up in universities and schools
- the availability of teacher training in different languages.

4.2.1 Languages spoken by UK adults

The Eurobarometer survey of adults found that French predominated among the languages that UK respondents said they were able to speak. Responses are shown in Figure 53:

Figure 53: Languages UK adults say they can speak in addition to their mother tongue, 2012
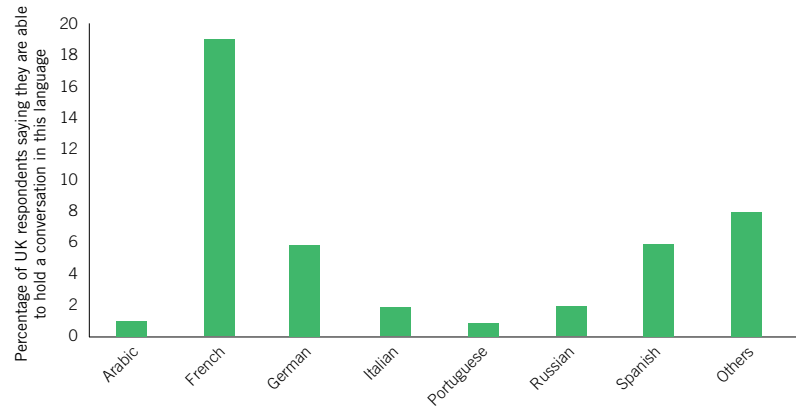
Source: Eurobarometer 2012.

In addition to this, and as noted above, around 12% of UK respondents said their mother tongue was not English. The languages they said were their mother tongues and proportions of respondents are shown below:

French	1%
German	1%
Polish	2%
Portuguese	1%
Other	6%

4.2.2 Languages spoken by schoolchildren

School censuses in different parts of the UK have drawn attention to the diversity of languages known by pupils. In some cases these overlap with languages taught in schools and universities. Figures 54 and 55 show the most commonly reported languages spoken by pupils in English and Scottish schools in 2011. No comparable data exists for Wales or Northern Ireland.

Figure 54: Languages spoken by more than 10,890 pupils (0.2%) in English schools, 2011
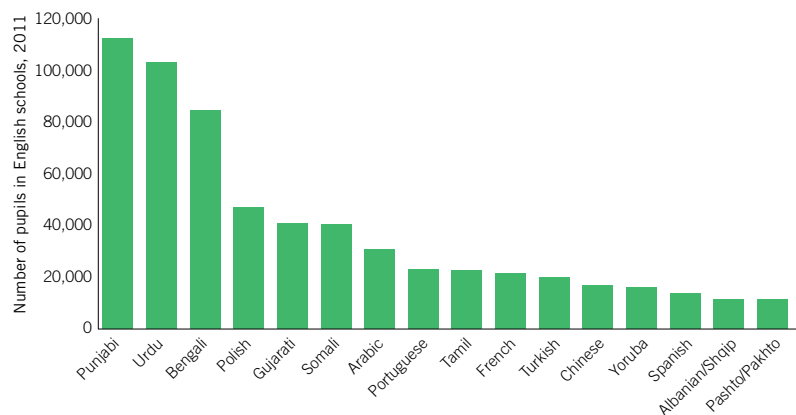
Source: DfE Pupil Census 2011.[260]

260 Figures provided by NALDIC, 'School Census January 2011 Language Data. Number of Compulsory School Aged Pupils in Primary, Secondary and Special Schools by Declared First Language', 2011 www.naldic.org.uk/research-and-information/eal-statistics/lang.

Figure 55: Languages spoken by more than 420 (= 0.06%) pupils in Scottish schools, 2011
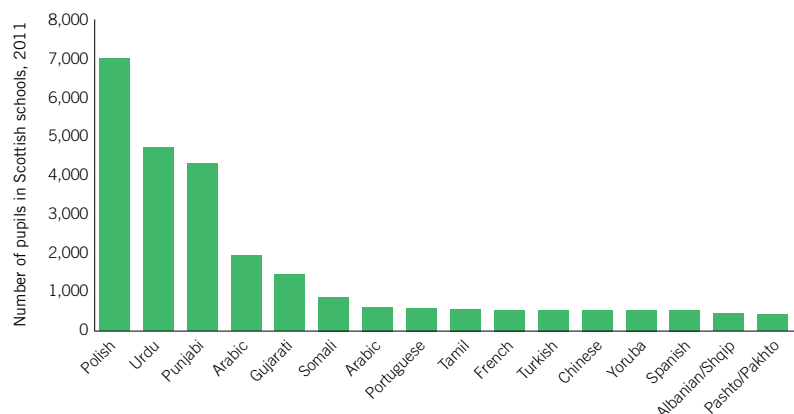
Source: Scottish Government.[261]

Efforts have been made to map language capacity at local level in London, Manchester and elsewhere based on the languages spoken by schoolchildren.[262] London is generally regarded as the most multilingual city in the UK and the latest research puts the number of languages at 233. Mapping and naming the languages and the numbers of speakers is the first step towards the strategic development of planning how to support mother tongue language skills and harness their value for the wider community. A report on community languages teaching in England, Scotland and Wales showed that at least 61 of the many languages spoken were being taught to children of school age at complementary schools or centres run by parents, and as many as 35 languages were being offered by mainstream schools, either as part of the core curriculum or as an enhancement after school hours. Public examinations, which enable these languages to be assessed and certificated, are available in a much smaller number of languages. GCSE qualifications are available in 21 languages including Welsh and Irish. Asset Languages qualifications were, until recently, available in 23 languages, including some (e.g. Tamil, Somali and Yoruba) not available at GCSE. However, this range of languages is now to be discontinued.

4.2.3 Languages in UK universities
This section covers:

- the offer of language degree courses in UK universities
- the balance of student numbers between languages
- trends in take up

The offer of degree courses in different languages in UK higher education institutions

The information which follows in Figures 56 and 57, on the number of universities offering degree courses in different languages, is derived from searches of the UCAS website in October 2012 for courses starting in 2013. The caveat is that there may be a mismatch between the offer of courses and the reality: some universities may offer courses which do not run, others may provide opportunities to study languages which are not explicitly included in the site's search terms (for example, in the case of Middle Eastern Studies). Figure 56 shows the most widespread languages, offered by more than 10 universities across the UK:

261 National Statistics. op. cit. Note that the source document names Bengali/Bangala (*sic*) as the language spoken, although the communities in question resident in Britain generally originate from the Sylhet district in eastern Bangladesh and speak Sylheti, a variety of Bengali sufficiently different from the standard to be considered a separate language. See discussion on this in Eversley and others.
262 http://mlm.humanities.manchester.ac.uk/ and Eversley and others op. cit.

Figure 56: Languages offered as first degree courses by more than 10 universities

Number of UK higher education institutions offering degree courses
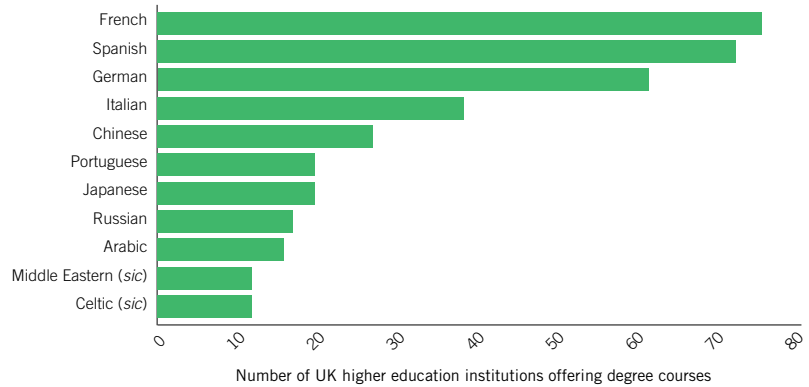
Source: UCAS course search, data accessed October 2012 for entry 2013.

Of these, only French, German, Spanish and Celtic studies are offered in all parts of the UK. In Northern Ireland it is not possible to study for a degree course in any language other than these four, although Portuguese can be combined with Spanish. According to the web search conducted, Welsh universities do not have degree courses in Arabic or Russian, however the languages shown in Figure 56 are available for degree study in both English and Scottish universities.

Figure 57 shows languages in which degree courses are less commonly offered by UK universities:

Figure 57: Languages offered as first degree courses by between 2 and 8 universities

Number of UK higher education institutions offering degree courses
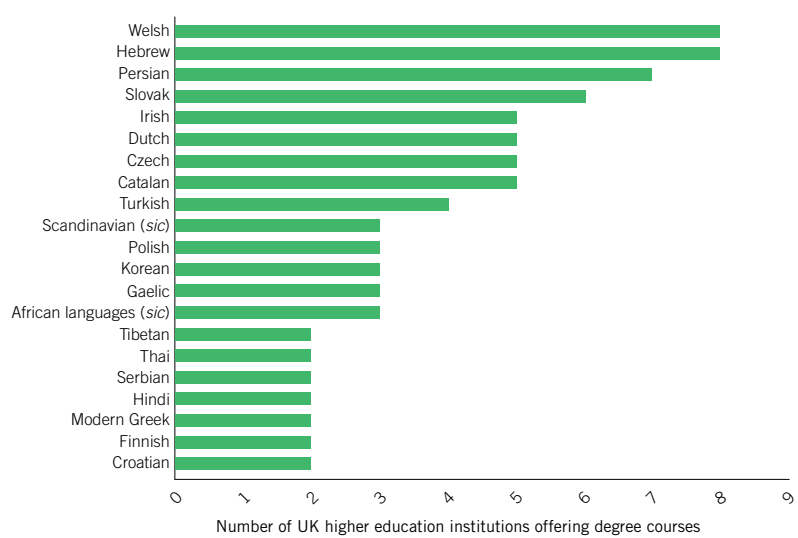
Source: UCAS course search, data accessed October 2012 for entry 2013.

Of the languages shown in Figure 57, only Irish is available in Northern Ireland, only Dutch, Irish and Welsh are available in Wales, and only Gaelic, Hebrew, Persian, Scandinavian and Slovak are available in Scotland. The other languages shown including Polish, Czech, Turkish, Greek, Thai, Serbian, Croatian and African languages are only available in English universities.

Other languages offered by single universities in England are:

- Amharic
- Bengali
- Bulgarian
- Burmese
- Danish
- Georgian
- Gujarati
- Hausa
- Hungarian
- Icelandic
- Indonesian

- Nepali
- Norwegian
- Romanian
- Sinhalese
- Swahili
- Swedish
- Tamil
- Urdu
- Ukrainian
- Vietnamese

This brings the total languages offered in degree courses in UK higher education institutions to 49.

Student numbers for different languages

HESA data supplied and analysed for this report shows how the offer of languages translates into student numbers – or rather 'learning experiences' – see Figure 58. Unfortunately 'Others in European Languages, Literature and related subjects' is a catch-all category, which affects the transparency of these data. There are also discrepancies in the ways in which universities report data, discussed in Appendix 3.

Figure 58: Languages studied by level 2010/11

Number of 'learning experiences'
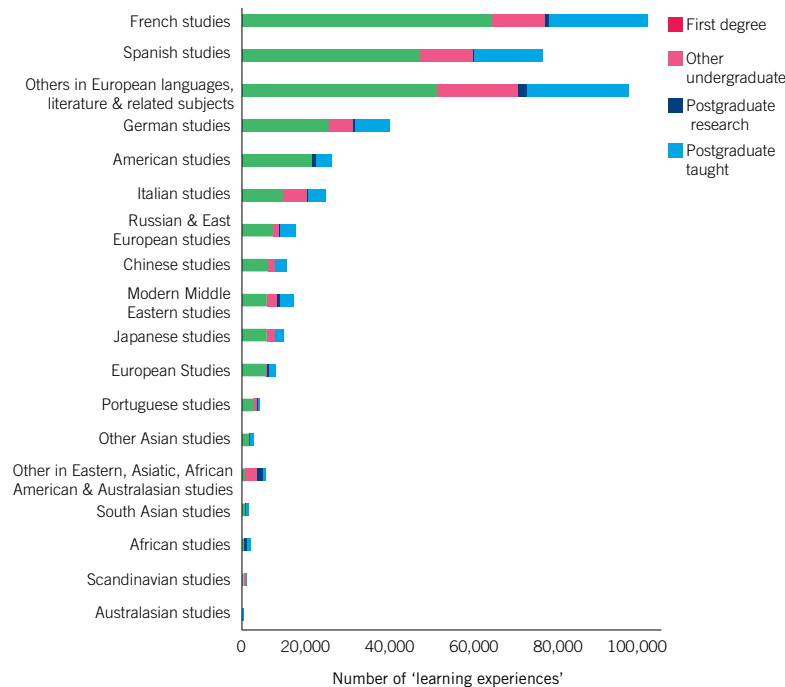
Source: HESA student record.

This broad overview embraces an immense variety of practice – and often a very fluid situation – within each language or group of languages. This requires monitoring by focused investigations such as that carried out by Scott-

Baumann and Contractor on Arabic,[263] or forthcoming findings on Slavonic and East European studies by John Dunn of Glasgow University.

Trends

Professor Worton's 2009 review of languages provision in English universities identified Asian Studies, Iberian Studies, Modern Middle Eastern Studies and African studies as growth areas over the period 2002/3 to 2007/8.[264] The report noted that Italian, German and French had declined over the same period. Because HESA data covers all undergraduates, whichever year of their course they are in, changes can be expected to show up fairly slowly. However, a comparison of figures over the four-year period since the Worton Report confirms that Asian studies, including Chinese, Japanese and Other Asian Studies continue to grow at first degree level, along with Middle Eastern Studies and Spanish studies. German and Italian continue to decline, but French studies have increased by 4% and Russian and East European studies by 16% according to this analysis.

Figure 59: First degree students in various language subjects, 2007/8 and 2010/11
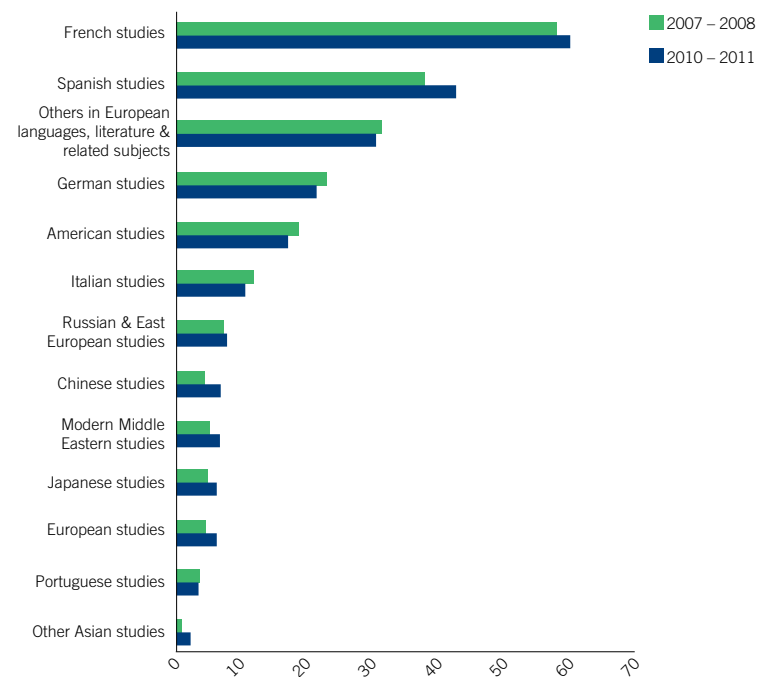
Source: HESA student record.

Data on postgraduate take up (Figure 60) show a slightly different picture, with Chinese and Spanish – two languages which are growing at undergraduate level, seeing reduced numbers of postgraduate students, while there has been an increase in the number of postgraduate students in Italian and Portuguese. These figures could indicate a possible divergence in interest in a language for postgraduate academic study, versus a more instrumental approach at undergraduate level.

263 A Scott-Baumann and S Contractor, *Arabic Language and the Study of Islam. Who Studies Arabic and Why and How Can These Skills Be Used at University and Beyond?*, 2012.
264 Michael Worton, *Review of Modern Foreign Languages Provision in Higher Education in England*, 2009 www. hefce.ac.uk/pubs/year/2009/200941/ [accessed 1 January 2013], paragraph 80.

Figure 60: Postgraduate students in various languages, 2007/8 and 2010/11
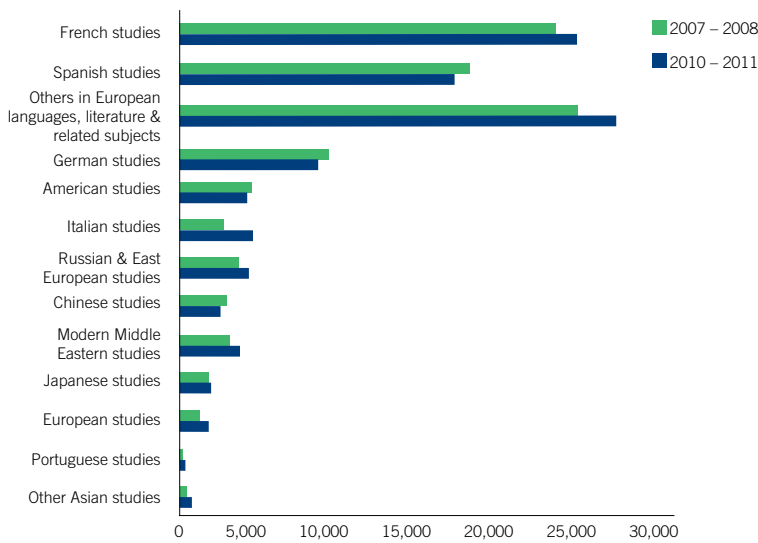
Source: HESA student record.

4.2.4 Advanced level

French, German and Spanish dominate the range of languages being taken at advanced level (Level 4 on the European Qualifications Framework, equivalent to A-level in England, Northern Ireland and Wales, and Higher Grade in Scotland) – see Figure 61. In 2012, across the UK a total of 42,887 learners obtained qualifications in languages at this level, of which 17,199 (40%) were in French, 8,944 (21%) in Spanish and 5,891 (14%) in German. Just over 1,000 learners obtained qualifications at this level in Italian and Russian across the UK as a whole and less than 1,000 in other languages. Gujarati saw only 19 entries.

A-levels can be taken in 21 languages, including Welsh and Irish and Highers can be taken in Chinese, French, German, Spanish, Italian, Russian, Urdu and Gaelic/Gàidlhig. However, the SQA has announced its intention to abandon national examinations in Russian from 2015, because of low take up.

Figure 61: Breakdown of language entries for A-levels and Highers, 2011
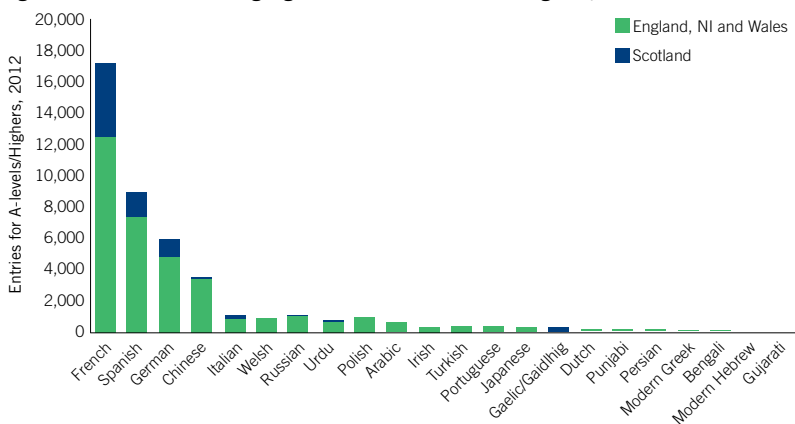
Sources: JCQ and SQA op. cit.

Analysis of trends shows that all parts of the UK have seen significant declines in the numbers of students taking higher level examinations in German over the past three years (and, indeed previously), as can be seen in Figure 62. French has also declined in England, Northern Ireland and Wales, but has risen slightly

in Scotland. Spanish has increased in Scotland and Northern Ireland, and has remained steady in England, but declined in Wales.

Figure 62: Changes in entries in French, German and Spanish at A-level/Higher, 2009–2012
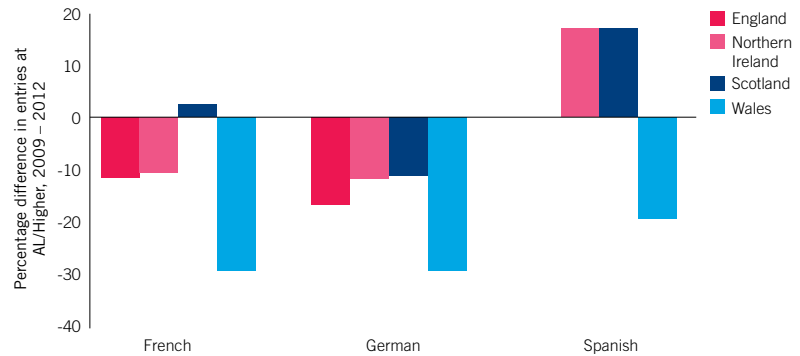
Sources: JCQ and SQA op. cit.

As regards other languages at A-level, the number of entries for Polish has doubled over 3 years, and Russian, Arabic, Turkish and Portuguese have also seen rises of between 19% and 26%. Chinese has grown by 9%. In contrast, numbers for Gujarati and Bengali have dropped by 50% and 44% respectively, and Irish, Panjabi, Greek and Welsh have also all seen declines.

In Scotland numbers for Italian and Gaelic have declined at Higher level over the last three years, but Urdu, Chinese and Russian have increased, though the numbers taking them are very small. A Scottish review of the economic case for languages found that the decline in numbers for smaller languages was a threat which would make them unviable, also impacting on the supply and training of teachers of those languages.[265] As noted above, this is already happening in the case of Russian.

4.2.5 GCSE and similar level

Figure 63 shows the share of entries in language subjects at GCSE. Although the GCSE exam is available in 21 languages, 86% of entries are in French, German or Spanish.

Figure 63: Share of different languages of all MFL entries at GCSE, 2012
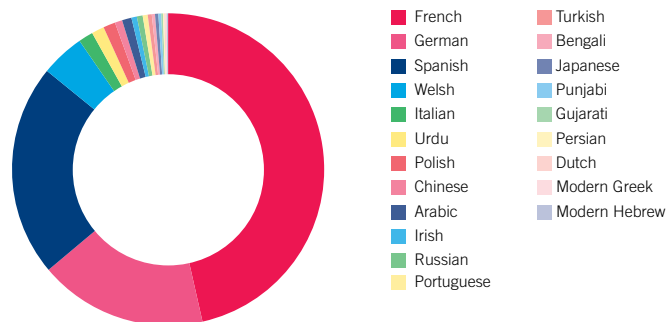
Source: JCQ op. cit.

Figure 64 compares entries in language GCSEs in England, Wales and Northern Ireland and a basket of comparator qualifications in Scotland.[266] The chart shows how French and German entries have declined across the UK. Spanish has also declined in Wales, but has increased numbers in the other parts of the

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265 Grove. op. cit.
266 Following the lead of Scottish CILT, we have included for this purpose Access 3, Standard Grade and Intermediate 1.

UK, particularly England.

Figure 64: Change in entries in French, German and Spanish at GCSE/similar level, 2009–2012
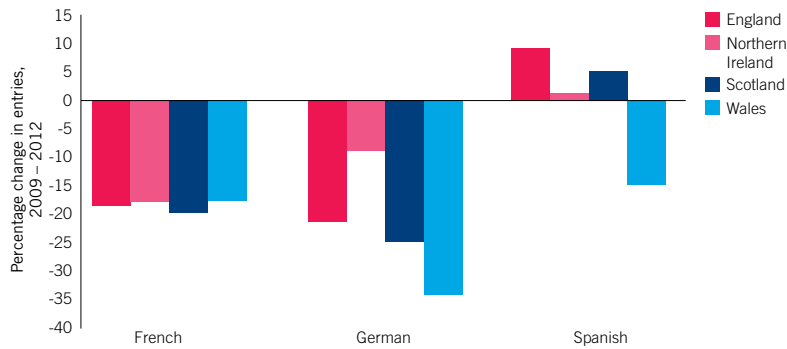
Sources: JCQ and SQA.

Over the same 3-year period, entries for GCSE (from England, Northern Ireland and Wales combined) have increased for Polish (13%) and Modern Hebrew (9%). Very small increases (less than 3%) have also been registered for Russian, Arabic and Portuguese. All other languages have declined in numbers, most significantly Dutch (-29%), Gujarati (-28%) and Chinese (-27%).

In Scotland, in this group of qualifications over the same period of time, Russian and Chinese have seen big percentage increases from a very low base and Italian has also increased. Urdu, Gaelic and Gàidhlig have all declined.

4.2.6 Languages offered at school level
The supply of language skills at this level reflects the languages taught in UK education systems and, to a much lesser extent, languages spoken by schoolchildren with backgrounds from outside the UK. The languages most commonly offered by English state-funded and independent schools are shown in Figure 65.

Figure 65: Languages offered by English state-funded and independent schools, 2011/12
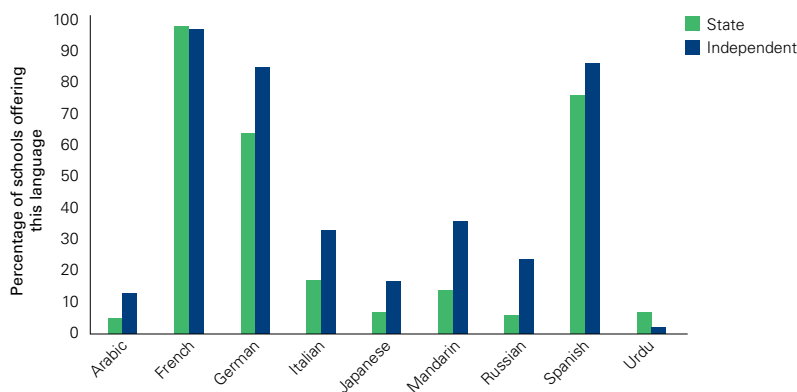
Source: Tinsley and Han, 2012.

As can be seen from these figures, languages such as Polish, Turkish and Portuguese, which feature in exam statistics, are not generally taught in schools. However, we can assume that entries either come from colleges and adult education institutes, or from schools acting as exam centres for their pupils and the local community without actually teaching the language.

Figure 65 shows that independent schools have a much wider range of languages on offer. This is significant in that evidence from the European Survey on Language Competences shows that the more foreign and ancient languages (secondary) schools offer, the higher the language test scores of their pupils.[267] This may be to do with the level of importance that schools attach to language learning and the prevailing ethos within the school, and the finding may help to explain why independent schools, as is discussed below, contribute a disproportionate share of language A-level entries.

The Language Trends surveys, which have charted developments in secondary schools since 2002, show that over time there has been a steady growth in Spanish and decreases in both French and German. However, in the last year both French and German have seen increases as well as Spanish, although the rebalancing in favour of Spanish is still in evidence. It has proved very difficult for other languages such as Mandarin, Japanese, Russian or Arabic to become embedded within the school system. A 2007 report on Mandarin teaching in English secondary schools found that there were barriers in moving from teaching the subject as an 'enrichment' option to a mainstream curriculum offer. These included the reliance on temporary and unqualified teachers or Foreign Language Assistants and the availability and appropriateness of qualifications.[268]

In Scotland, French is still the most frequently studied modern language up to the 4th year of secondary school, with German second and Spanish third, although the gap between German and Spanish is narrowing. Figure 66 shows the proportion of schools reporting offering these three languages and others in 2011 compared to a similar survey in 2007.

Figure 66: Scottish secondary schools offering French, German and Spanish at S4, 2007 and 2011
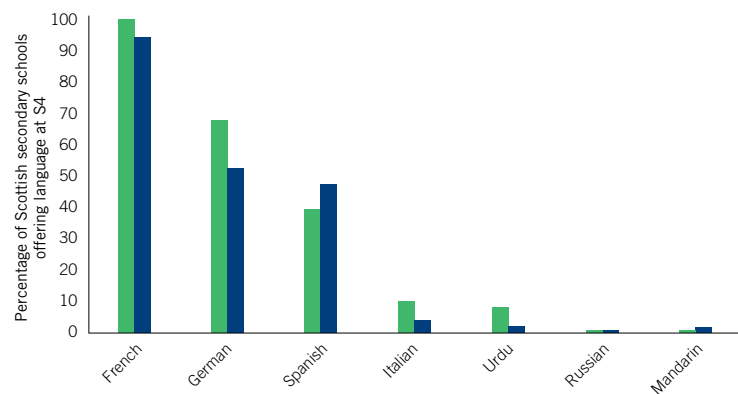
Source: SCILT, National Survey of Modern Language Provision in Scottish Schools, August 2011.

267 European Commission, *First European Survey on Language Competences. Final Report.*
268 CILT, *Mandarin Language Learning. Research Study. Department for Children, Schools and Families*, 2007.

Primary schools

In primary schools there is a strong tendency for French to be the dominant
language taught. Figure 67 shows findings from surveys of primary schools
teaching languages in England (2008) and Scotland (2011).

Figure 67: Primary school language provision, England and Scotland
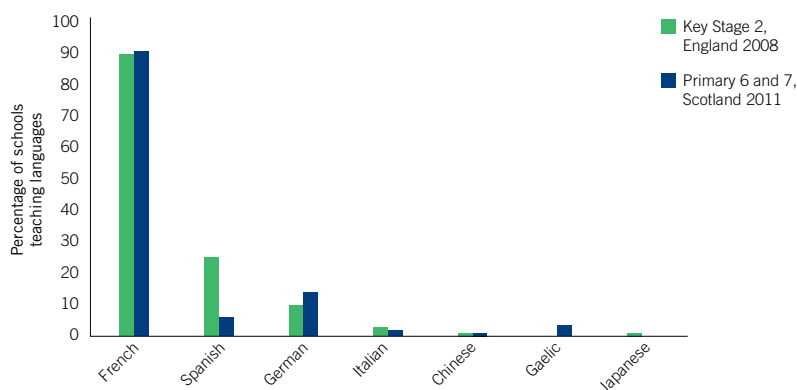
Sources: Wade and Marshall, 2009 (England), and SCILT National Survey of Modern Language Provision in
Scottish Schools, 2011.

In addition to the languages shown in Figure 67, a very small number of English
primary schools (around 1%) were also teaching another language including
Urdu, Bengali, Latin, British Sign Language and Polish. In Scotland a very small
number of schools (less than 1%) were teaching Urdu.

4.2.7 Teacher training

The results of a course search for secondary level initial teacher training in
languages on the Graduate Teacher Training Registry (GTTR) are shown in
Figure 68. This shows that French, German and Spanish are the only languages
in which teacher training is offered via this route in each of the different parts
of the UK. Northern Ireland in addition offers Irish; Wales: Italian and Welsh;
and Scotland: Italian, Mandarin and Gaelic. In England teacher training courses
are offered additionally in Urdu, Japanese and Russian. One English provider
also offers 'community languages' but these are not specified on the search
facility. No teacher training is offered through the GTTR system specifically
for other languages, for example Arabic or Portuguese, although this may be
possible via other routes. An Ofsted report in 2008 identified 8 providers of
PGCE courses in 'community languages' in England with a total of 35 trainees,
but noted that such courses were fragile in the extreme and did not run every
year.[269] It recommended that all community languages teachers should have
the opportunity to achieve qualified teacher status and suggested a number of
measures which teacher training institutions might take to diversify their offer
and make it accessible to potential applicants.

269 Ofsted, *Every language matters*. 2008

Figure 68: Number of providers offering secondary teacher training in different languages, by different parts of the UK
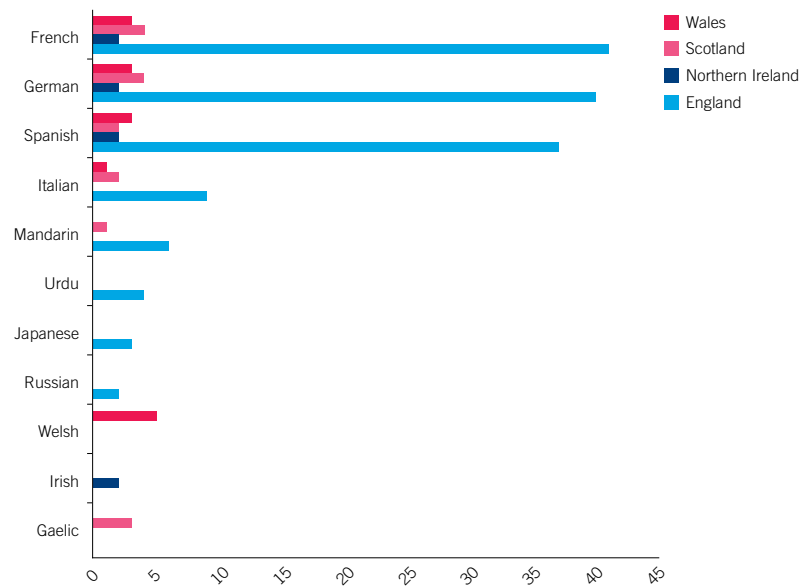
Source: GTTR course search October 2012 for courses starting 2013.

Training for primary school teachers of languages is available in England in the following languages at the number of institutions indicated:

French	14
German	7
Italian	1
Spanish	8

In addition, courses for training to teach cross-phase (7 to 14) are available through a single provider in French, German and Spanish.

4.2.8 Summary

The linguistic skills of people who have access to another language in their homes and families already accounts for around one quarter of total UK language capacity, and the languages spoken by UK schoolchildren represent a valuable future source of supply, if these skills can be developed appropriately.

Language education in the UK is based largely on three European languages: French, German and Spanish. Opportunities to study or obtain qualifications in other languages are more limited and there is no match in these cases between a) languages offered in schools; b) languages in which it is possible to train as a teacher; c) languages in which formal accreditation is available and d) languages which are spoken by schoolchildren. Whilst accreditation is available for some languages which are present in the population but not taught in schools, other languages which are strongly represented in the school population do not have such accreditation available. Where accreditation does exist, in some cases take up is very low and the viability of continuing to offer it is put in doubt.

Many – but not all – of the diverse range of languages present in the population are also available to study at university level, although most of the lesser-taught languages are only available at English universities.

Opportunities to study a wider range of languages open up as the learner passes through the system. While in primary schools there is a focus on a very small range of languages, in secondary there is comparatively more choice, and in higher education, a very wide range of languages are available across the UK as a whole, although not in all four parts. This 'inverted pyramid' model of diversification appears to have developed somewhat organically[270] rather than as the product of any policy or strategy, and the same pattern is evident in all parts of the UK:

Figure 69: Diversity in language education – England

Higher education:
- Language degrees available in 49 languages

Upper secondary:
- A-level available in 21 languages
- French, German and Spanish account for 72% of foreign language entries

Lower secondary:
- Teacher training available for 8+ languages
- GCSE available in 21 languages
- French, German and Spanish account for 90% of entries

Primary schools:
- 70% French
- Teacher training for 4 languages

Figure 70: Diversity in language education – Scotland

Higher education:
- Language degrees available in 16 languages

Upper secondary:
- High level available in 9 languages
- French, German and Spanish account for 95% of Advanced Level foreign language entries

Lower secondary:
- Exam available in 9 languages
- French, German and Spanish account for 98% of language entries
- Teacher training in 6 languages

Primary schools:
- No initial teacher training available with languages

270 There was a policy of diversification in English secondary schools in the 1980s, and a project in the 1960s to introduce specifically French teaching into English primary schools. See Eric Hawkins, 'The Early Teaching of Modern Languages – a Pilot Scheme', in *30 Years of Language Teaching*, ed. by Eric Hawkins (CILT, 1996), pp. 155–164.

Figure 71: Diversity in language education – Northern Ireland

Higher education:
- Language degrees available in 5 languages

Upper secondary:
- French, German and Spanish
account for 91% of Advanced Level foreign language entries

Lower secondary:
- Teacher training available in French, German,
Spanish and Irish
- French, German and Spanish account
for 97% of MFL exam entries

Primary schools:
- No initial teacher training
in languages

Figure 72: Diversity in language education – Wales

Higher education:
- Language degrees available in 9 languages

Upper secondary:
- French, German and Spanish
account for 81% of MFL A-level entries

Lower secondary:
- Teacher training available in 5 languages
- French, German and Spanish account
for 95% of MFL GCSE entries

Primary schools:
- No initial teacher training
for languages
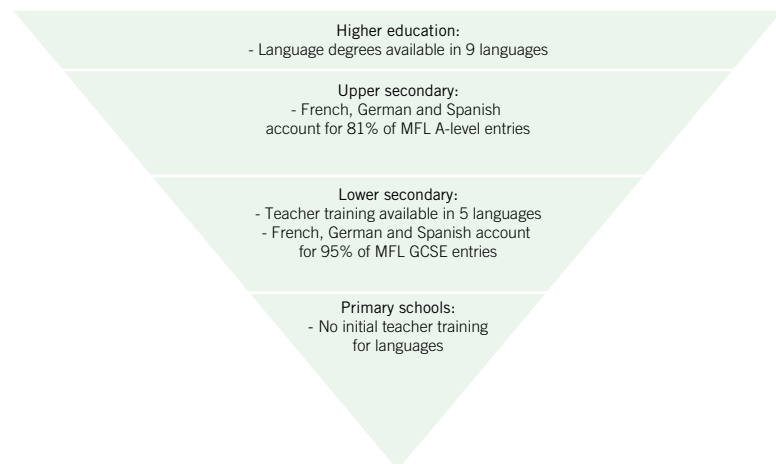
4.3 Languages in combination with other subjects and professional qualifications

Research into the labour market consistently shows that employers need language skills in combination with other types of competence and experience.[271] Respondents to the *Beyond English* survey said that the biggest obstacle to fulfilling their language needs was finding staff or recruits with the right mix of language skills and other skills to do the job.[272] Whilst some of this may be gained from actual experience in the workplace, the combination of subjects chosen at age 16–19 and at university is a key consideration for understanding the match of supply and demand.

This section looks at:

- Post-16 and vocational courses
- Combinations of languages with other subjects in higher education
- Professional qualifications with languages.

271 See Labour Market Intelligence reports cited in Chapter 3, passim and also CILT, 'Labour Market Intelligence for the Qualifications Strategy for Foreign Languages and Intercultural Skills', 2008.
272 Tinsley, *Beyond English: Britons at Work in a Foreign Language. Findings from a Survey of Employers.*

4.3.1 Post-16 and vocational courses

The combination of languages with other subjects at A-level has been explored by Gallagher-Brett and Canning, in relation to the broader preparation students receive for embarking on language degree courses.[273] They note that there are 2,300 possible combinations of 3 subjects at A-level and that, whereas students are not accepted on science degree courses without at least 2 and often 3 science A-levels, there are no such constraints for students starting language degrees. In a small-scale piece of research involving 45 students they found that students combined A-levels in French or German with a very wide range of subjects – see Figure 73.

Figure 73: Other subjects studied by A-level students of languages
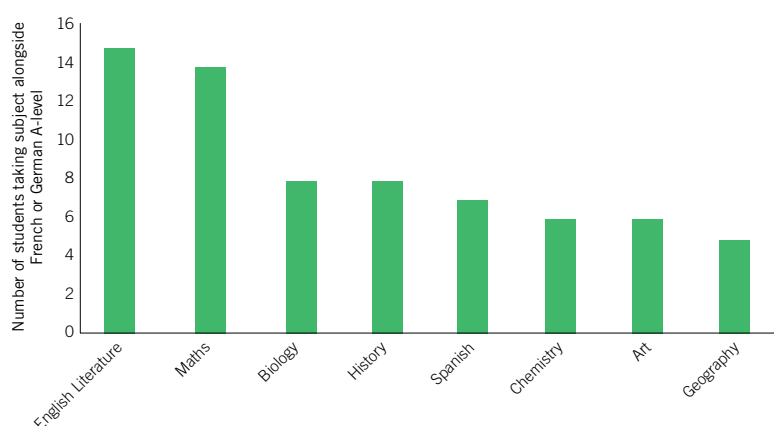
Source: Gallagher-Brett and Canning, 2011.

The authors noted that a number of other subjects (Dance, Media Studies, Textiles) were also studied alongside French or German at A-level by a small number of the students surveyed. They felt that the diversity of subjects studied alongside languages at A-level, combined with the functional nature of the exam syllabuses, was a limiting factor in developing the critical and reflective aspect of language study at university. They concluded that the study of history and literature at A-level alongside languages provided an effective preparation for language degrees. This observation highlights the tension between the academic and more instrumental purposes of language study. As noted in section 4.1.3, there is some evidence that languages are in competition with STEM subjects at A-level.

There is very little vocationally-related language learning being undertaken in the FE sector. The 2011 survey of 57 colleges found 10 that were offering languages as an element of vocational courses and that the most common combination was Spanish with either Travel and Tourism or Business Studies. Most language learning in the sector is targeted at advanced level students on stand-alone courses, and numbers were worryingly low on some of these, which colleges attributed to the decline in take up in secondary schools.[274] Reasons put forward for the decline in languages linked to other programmes included funding changes, relocations, and course leaders not understanding the relevance of languages in vocational courses. Although the overall picture was one of shrinking provision, some individual institutions had seen numbers

273 A. Gallagher-Brett and J. Canning, 'Disciplinary Disjunctures in the Transition from Secondary School to Higher Education Study of Modern Foreign Languages: A Case Study from the UK', *Arts and Humanities in Higher Education*, 10 (2011), 171–188.
274 CfBT and others.

increase – the study showcased an example from Leeds City College where Travel and Tourism students undertook 60 hours' study of Spanish leading to NVQ Level 1 in preparation for work placements in Spain funded under the European programme Leonardo.

4.3.2 Combined degrees

Both UCAS and HESA data show us that languages are more often studied as combined degrees than as single honours degrees. Because of the way universities report student data, it is not possible to give an exact proportion, but possibly as many as three quarters of those studying a language as a part of their degree do so in combination with another subject (although not necessarily with languages in the course title). Around one third of these combine two language subjects (e.g. French and German).[275]

This section looks at combinations of languages with non-language subjects. Figure 74 shows the most frequent combinations in 2011:

Figure 74: Top 10 combinations of non-language subjects with languages, 2011
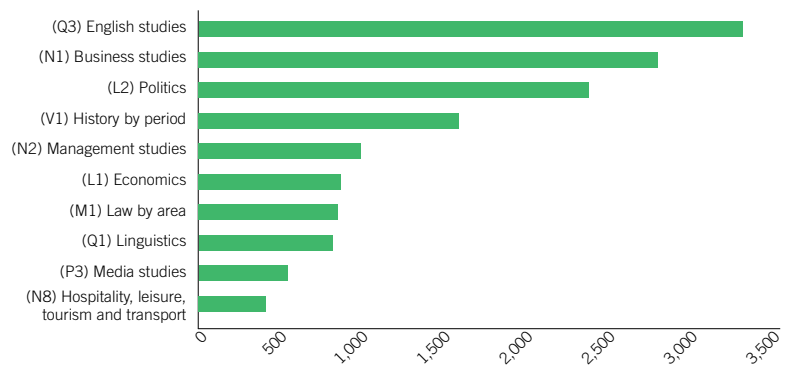
Source: HESA (headcount).

The preference is clearly to combine languages with English, Business, Politics; however, combinations with History, Management or Economics are also attracting sizeable numbers of students. Combinations with STEM subjects are far less common. As can be seen from the change of scale in Figure 75, these are counted in tens or hundreds rather than thousands:

Figure 75: Top 10 combinations of languages with STEM subjects, 2011
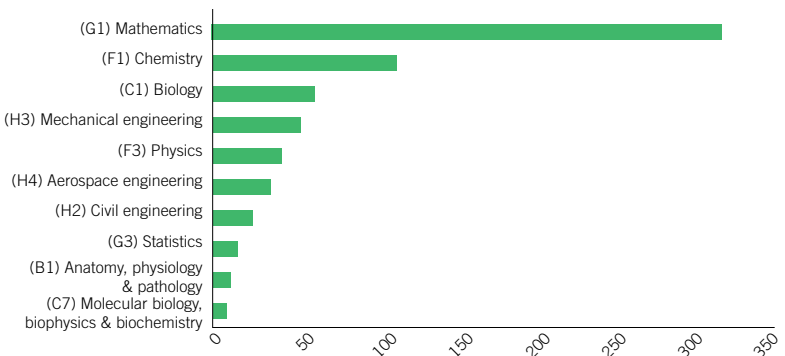
Source: HESA (headcount).

275 CILT, 'HE Language Students in the UK 2002–03 to 2008–09 Annual Analysis of HESA Data' (CILT, the National Centre for Languages, 2010).

When the fact that these figures represent students across all years of the course programme is taken into consideration, it can be seen that the annual number graduating in these combinations of subjects is very low indeed. Similarly, Figure 76 shows the most frequent combinations of languages with degrees which could be regarded as 'vocational'. Others with even smaller numbers include 63 in computer science, 66 in accounting, 13 in finance and just 2 in food and beverage studies.

Figure 76: Top 10 combinations of languages with 'vocational' degrees, 2011
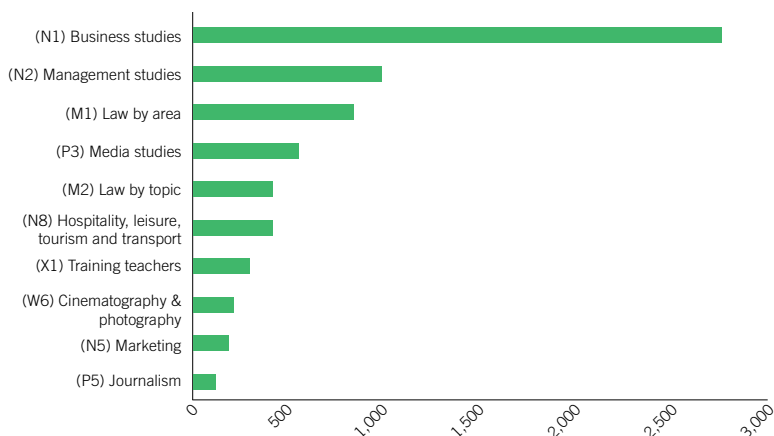
Source: HESA (headcount).

A previous analysis of HESA data from 2002/03 to 2007/08 looked specifically at students from non-language disciplines taking language modules, and found a largely similar picture, with Business and Administrative studies strongly represented and Mathematics and the Sciences students making up only a small proportion of the total.[276] In contrast, a survey of non-specialist language learners, which included some learners not picked up in the HESA data, found Engineering and the Physical Sciences among the most strongly represented subject areas.[277] Although the survey was relatively small-scale it indicates that there are potentially greater numbers of both postgraduate and undergraduate learners combining languages with STEM subjects than recorded by HESA.

4.3.3 Interpreting and Translation
A small proportion of those studying languages at university are taking specialist courses in Interpreting and/or Translation.

Seven universities offer undergraduate level Interpreting and Translation courses including five in England, one in Scotland, and one in Wales but none in Northern Ireland.[278] Two of these focus on Translation only, without Interpreting. Once again the languages covered tend to be French and/or German and/or Spanish; however one university offers 15 language combinations. Figure 77 shows the very small number of students that these involve (bearing in mind that these too tend to be 4-year courses):

276 European Commission/ Thematic working group "Languages forJobs", *Languages for Jobs: Providing Multilingual Communication Skills for the Labour Market*, 2011.
277 John Canning.
278 Anne Marie Graham, *Training Provision for Public Service Interpreting and Translation in England*.

Figure 77: Numbers of students enrolled on Q9: 'others in linguistics, classics and related subjects' undergraduate courses, 2007/8 to 2010/11

2007/8	2008/9	2009/10	2010/11
269	256	315	334

Source: HESA student record.

However, it should also be borne in mind that other universities offer Translation or Interpreting modules as part of more general language degrees.

A more common way of acquiring competences in Translation and Interpreting is through postgraduate study. At Masters level, there are 18 institutions offering Interpreting and Translation courses including one in Scotland and two in Wales and again, none in Northern Ireland.[279] These have different foci, some more academic and theoretical, others with more of an emphasis on vocational skills. Translation is more commonly offered than Interpreting. For example, Leeds focuses on Conference Interpreting, Roehampton on Audio-Visual Translation and Essex offers Chinese. There are also postgraduate Diplomas in Interpreting and Translation (either in combination or separately) at 4 institutions. As can be seen from Figure 78, translation studies have been increasing in popularity (note there is no separate code for Interpreting):

Figure 78: Masters students enrolled on courses related to Translation and Interpreting, 2007/08 – 2010/11

	2007/08	2008/09	2009/10	2010/11
(Q900) Others in linguistics, classics & related subjects	161	143	137	126
(Q910) Translation studies	1200	1323	1508	1638
(Q920) Translation theory	56	66	59	67
Total	1416	1532	1703	1831

Source: HESA.

Public Service Interpreting and Translation
A few of the above courses cover Public Service Interpreting and/or Translation as a unit within the course. There is a consensus among academics that different specialist skills and understanding are required for Public Service Interpreting than for Conference Interpreting.[280] A recent report on training provision for Public Service Interpreting and Translating cites only 4 institutions (three in England, one in Wales) offering postgraduate training relevant to this field, one of which specialises only in Translation (without Interpreting). The report identifies a number of factors which prevent a more effective supply of such courses, including the wide range of languages needed, and poor employment conditions for those who have completed such training, which drives down student demand. Course providers felt that, because of the difficulties in attracting students, such training may only be viable if offered as a pathway within generic courses.

A degree-equivalent qualification, the Diploma in Public Service Interpreting, has for more than a decade provided accreditation and quality assurance for those working in the sector. Courses to prepare for this examination, which is

279 From www.prospects.ac.uk postgraduate course search. NB this may not be comprehensive.
280 Anne Marie Graham, *Training Provision for Public Service Interpreting and Translation in England*.

run by the Institute of Linguists Educational Trust and accredited by Ofqual, are offered by more than 30 institutions including universities, local authorities, Adult Education Institutes and private companies across the UK, mostly on a part-time basis. There is evidence that the availability of courses varies from year to year. The qualification covers 50 languages and candidates focus on one of four specialisms: Law (English or Scottish), Health, or Local Government. Around 75% of candidates take Law. Some options and some languages are only offered if there is demand. Figure 79 shows that numbers sitting the examination grew in the early 2000s, then started to decline but have since risen again:

Figure 79: Candidates for Diploma in Public Service Interpreting, 2002–2011

Year	Number of candidates
2002	973
2003	1131
2004	1138
2005	1108
2006	1088
2007	1091
2008	995
2009	929
2010	998
2011	1023

Source: IOL Educational Trust, *Diploma in Public Service Interpreting. Chief Moderator's Report 2011* .

Since January 2012, language services for the justice sector have been contracted out to a company which has brought in a new system of assessment for Public Service Interpreters, creating three tiers within the profession and using Middlesex University to assign interpreters to the appropriate grade. The operational difficulties encountered in the implementation of this project have been the subject of an investigation by the National Audit Office, which noted that the assessments covered only 32 languages, which were 'a small fraction' of the total number required.[281] The report has recommended that the Ministry of Justice should review the quality standards inherent in the contract and that it should also think creatively 'about how to attract additional, adequately qualified interpreters to the work'.[282]

4.3.4 Summary

The evidence suggests that languages tend to be combined with academic subjects, whether at school or university and that very little language learning is taking place in conjunction with courses which explicitly develop other workplace skills. Although some students take Maths with a language at A-level, the combination of a language with STEM subjects is very uncommon at university. Business studies is the most common 'vocational' degree to be combined with languages. Further analysis and research would be necessary to ascertain which languages are involved and how combining languages with business studies or other vocational options affects employability.

281 National Audit Office. p. 18.
282 National Audit Office. p. 6.

The opacity of reporting categories makes it difficult to monitor the supply of Translation and Interpreting skills – potentially the most obvious skill area in which supply and demand could be matched.

4.4 What is the social and geographical spread of language skills?

This section considers evidence from both higher education and the schools sector on the relationship between participation in language study and:

- socio-economic status
- educational achievement
- ethnicity
- gender.

4.4.1 Social advantage and disadvantage

Widening participation in higher education has been a concern of both the previous and the current governments and at school level, DfE Ministers have made clear that the gap between rich and poor in language learning was one of the main drivers of the English Baccalaureate initiative.[283] The concern that language learning is seen as a mark of privilege rather than as an entitlement for all pupils was also expressed in a recent Scottish report.[284]

Higher education

Research published in 2005[285] showed that the social profile of students taking languages in higher education was strongly biased towards those from privileged backgrounds, along with Medicine, Humanities and Agriculture. Figure 80, based on an analysis of UCAS acceptances, shows that the social imbalance exists across all subjects, but that it is much more marked in the case of languages – for non-European languages slightly less so than for European languages.

Figure 80: UK higher education acceptances by socio-economic group, 2011[286]
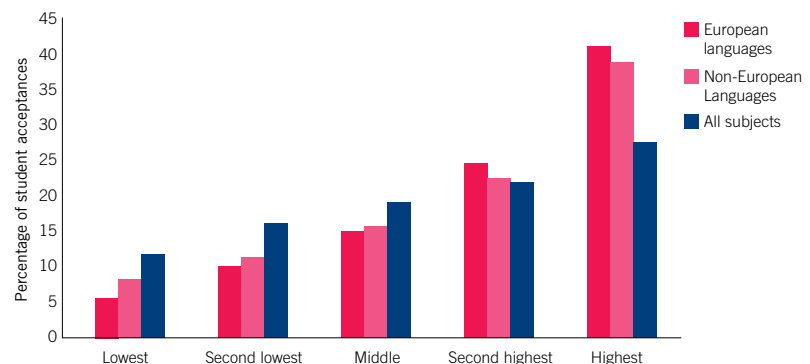
Source: UCAS.

A factor which contributes to concerns about the socio-economic balance in language study is the concentration of linguists in the older universities: this

283 Rt Hon. Nicholas Gibb MP Minister of State for Schools evidence to House of Commons Education Committee, *The English Baccalaureate*, 2011., 2011 p. 14
284 Grove. op. cit.
285 HEFCE, *Young Participation in Higher Education*, 2005 http://webarchive.nationalarchives.gov. uk/20100202100434/http://www.hefce.ac.uk/pubs/hefce/2005/05_03/05_03.pdf.
286 Using the POLAR classification of small local areas across the UK according to young participation in higher education. This is the system used in widening participation in higher education and is a proxy in this case for socio-economic status.

was an issue raised in the 2005 Footitt Report.[287] Figure 81 shows that four out of five undergraduate linguists are in pre-1992 institutions, compared to half that proportion across all subjects. HEFCE's advisory group on Strategically Important and Vulnerable subjects has noted that this raises concerns about the accessibility of language courses, given that those studying in post-1992 institutions are more likely than those in the older universities to be mature students, in work, studying locally and from neighbourhoods with low participation in higher education.[288] It is likely also to have implications for the type of courses available, given the traditional focus of the post-1992 institutions on applied courses and qualifications for the workplace.

Figure 81: Proportion of FTE undergraduate students at English higher education institutions by institution type, 2010/11
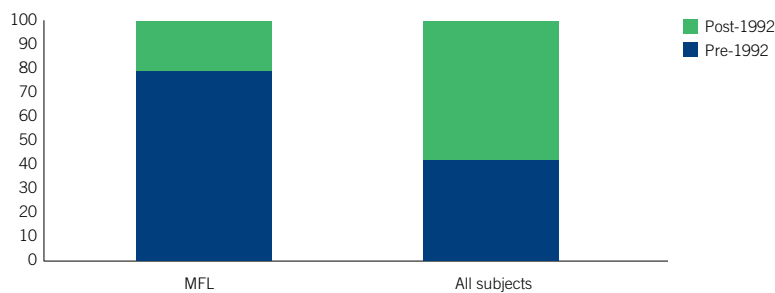
Source: HEFCE analysis of HESA data.

Data from 10 years' ago confirm that the concentration of languages in the older universities is becoming more marked.[289] While the balance between pre- and post-1992 universities has varied by only 1% across all subjects since 2001/2 (a very slightly larger proportion were then studying in post-1992 institutions), in the case of languages, the proportion in pre-1992 universities has risen from 72% to 79% in 2011/12. This is no doubt related to closures or contractions of language departments in universities like Wolverhampton, Northumbria and University of the West of England.

Schools
The social imbalance in higher education arises in part from the skewed distribution of A-level language entries, of which nearly a third come from independent schools. This is from 18% of the school population who attend independent schools post-16.

Figure 82: A-level entries by centre type, 2011
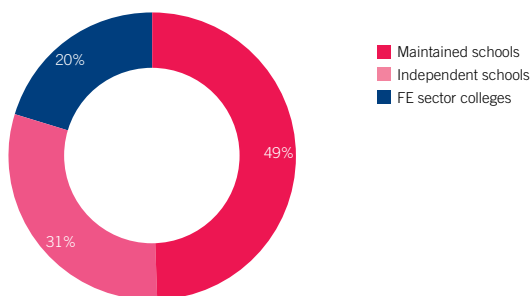
287 Footitt. P. 121.
288 HEFCE, *Strategically Important and Vulnerable Subjects. The HEFCE Advisory Group's 2010–11 Report.*
289 HEFCE, 'Data on Demand and Supply in Higher Education Subjects'.

DfE figures show that 71% of pupils in independent schools sit a GCSE exam in language, compared to 39% in the state sector. But the social divide also exists within the state sector. DfE data for 2011 show that 14% of children eligible for free school meals (a measure of social disadvantage) obtained a good GCSE in a foreign language, compared to 30.6% of other pupils.

Figure 83 shows the correlation between the proportion of pupils receiving free school meals (FSM) within a school, and the proportion taking a language at GCSE:

Figure 83: Proportion of GCSE entries by (school) level of social disadvantage, England, 2011
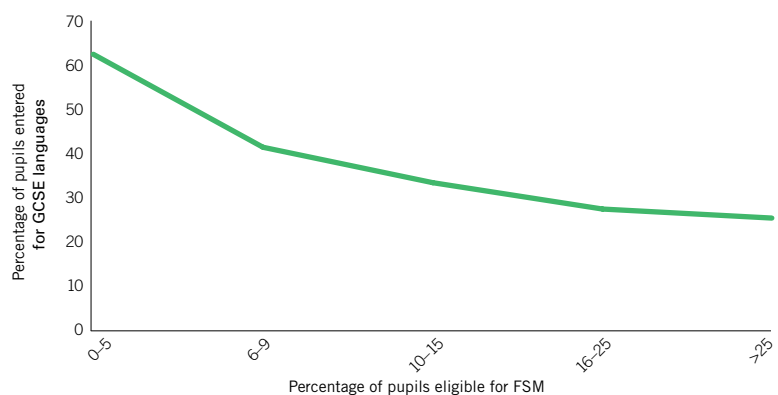
Source: DfE performance tables 2011.

In schools where 5% or fewer pupils are eligible for free school meals (FSM), 62% of pupils on average, take a language to GCSE – not quite as many as the independent sector but still high. At the other end of the scale, in schools where more than 25% of pupils receive free school meals, only 25% take a GCSE in a language. The average proportion of pupils on FSM across the whole country is around 15% and these figures show that the steepest decline is between the most advantaged schools and the next level down – very disadvantaged schools are not on the whole doing a lot worse than average schools, but the most advantaged schools are doing a lot better. This would indicate that, in England, studying a language to GCSE is more associated with advantage than NOT studying a language is with disadvantage.

There is some evidence the English Baccalaureate has already made some difference in addressing this social imbalance. The 2011 Language Trends survey found that 70% of schools with above average numbers of pupils on free school meals had already made changes, or intended to make changes to the place of languages in their curriculum as a result of the English Baccalaureate, compared to 48% of those in more favoured circumstances.[290] However, the Parliamentary Select Committee report on the English Baccalaureate highlighted concerns about the impact of the measure on progression and social mobility, hearing evidence that the measure would lead schools to focus on students at the borderline of achieving the English Baccalaureate 'and therefore have a negative impact on the most vulnerable and disadvantaged young people, who could receive less attention as a result'.[291] It was also felt

290 Tinsley and Han. op. cit.
291 House of Commons Education Committee. op. cit.

that 'shoehorning' pupils into courses where they have less interest or aptitude' could lead to increased truancy and numbers of NEETs (those not in education, employment or training). As mentioned in section 4.1.4, a recent report questions whether the increase in language take up seen in 2011 will result in a sustained trend, reaching larger number of pupils in future years.[292]

The lack of opportunities to study a language in vocational courses is further evidence of a concentration of language skills amongst the academic elite, an issue which has repercussions for the labour market. A survey in 2011 of 98 FE colleges from across the UK[293] found that only a small number of colleges were targeting learners on vocational courses and there was very little language teaching at all in general FE colleges without a Sixth Form.

4.4.2 Educational achievement

Data from both primary and secondary sectors shows that opportunities for language learning are greater in schools with higher educational achievement overall. Figure 84 presents data from annual surveys of English primary schools from 2006 to 2008 which show that primary schools that are already achieving well are more likely to be teaching a language than primary schools in the lowest attainment band. However, the most disadvantaged schools made relatively more progress by 2008 than higher attaining schools. This reflected the period during which targeted support was available to help schools develop primary languages in line with the National Languages Strategy.

Figure 84: Primary schools teaching languages by attainment band (England)
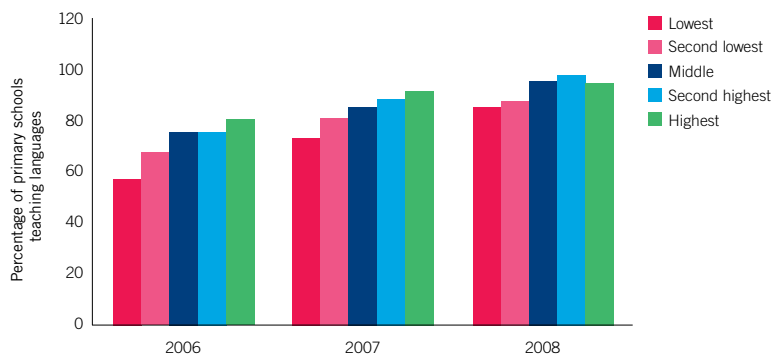
Source: Wade and Marshall.

The same pattern is in evidence in secondary schools. Figure 85 is taken from the 2011 Language Trends report and shows the proportion of secondary schools in each attainment band with more than 50% of the cohort taking a language in Year 10 – first year GCSE. Although the picture is very clearly one of stratification by attainment (i.e. fewer pupils in schools with lower educational achievement overall tend to take a language), the effect of the English Baccalaureate measure (see Chapter 2) can clearly be seen in the rise in the numbers of pupils taking a language in 2011, with the greatest impact on schools in the middle band of attainment.

292 Greevy and others. op. cit.
293 CfBT and others. op. cit.

Figure 85: Schools with more than 50% of year 10 pupils taking a language, by attainment band (England)
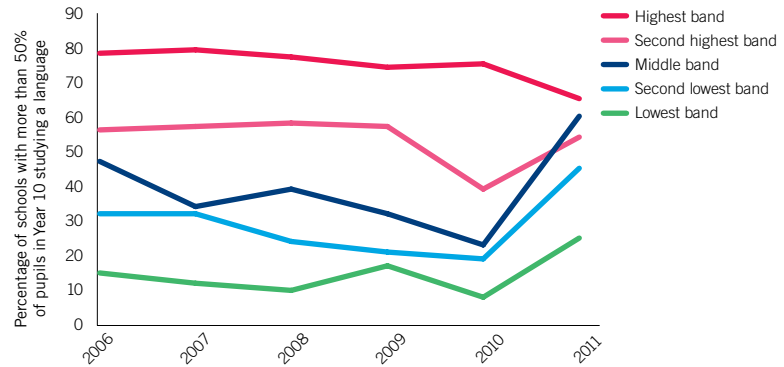
Source: Tinsley and Han, 2012.

It has not been possible to identify corresponding data for all parts of the UK, but it seems likely that a similar situation exists.

4.4.3 Ethnicity

Figure 86 reproduces data from DfE performance tables showing that in England, more than 65% of pupils of Chinese origin obtained a good GCSE in a foreign language, compared to 27.2% of White pupils. Chinese pupils were also the ethnic group most likely to obtain 5 good GCSEs including English and Maths, and to achieve the English Baccalaureate. Asian, Pakistani, Bangladeshi and Black African pupils all did proportionately better in achieving a good GCSE in a foreign language than White British pupils.

Figure 86: GCSE attainment by ethnicity, England, 2011
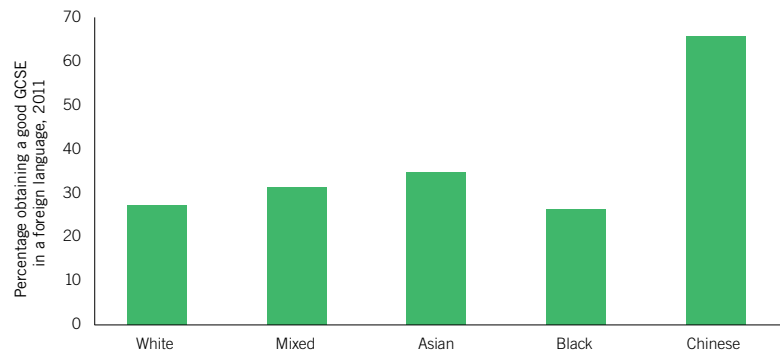
Source: DfE, GCSE and equivalent attainment by pupil characteristics in England, 2011, SFR03/2012.

4.4.4 English as an Additional Language

DfE figures show that children with English as an Additional Language are significantly more likely to obtain a good GCSE in a foreign language: 40% did so in 2011, compared to 28.8% of English first language speakers. Having English as an additional language made a small difference to educational achievement overall – across England as a whole 50.2% achieved 5 good GCSEs including English and Maths, compared to 52.6% of those with English as their first language.

Figure 87: Comparative achievement of English first language pupils and those with English as an additional language (England, 2011)
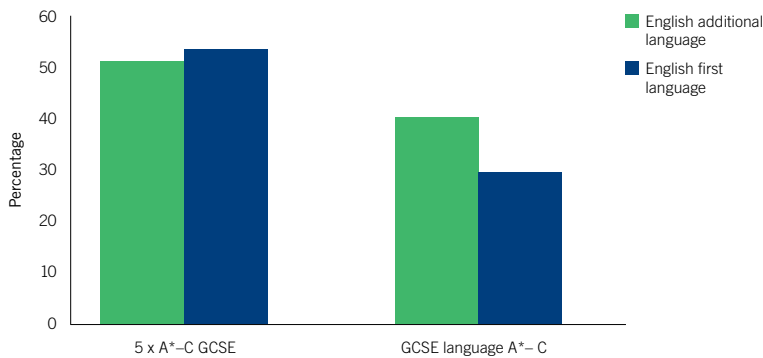
Only part of the disparity in language achievement shown in Figures 86 and 87 above is attributable to children who speak another language at home sitting a GCSE in that language. As already noted, GCSE accreditation is only available in a fraction of the languages spoken by pupils and French, German and Spanish account for the bulk of exam entries. The figures may be evidence that children who are already bilingual have an increased facility to learn a third language, or that language learning is more highly valued in families which are already bilingual. However these hypotheses need verifying through further research.

4.4.5 Gender
The under-representation of women in STEM subjects is seen as an issue both from the point of view of equal opportunities and for the health of the labour market, yet, as can be seen from Figure 88, languages is the most gender-marked of all the subject groupings in higher education – only 33% of linguists are male, while 35% of those studying STEM subjects are female. The gender balance in languages has improved by 1% since 2001/2, and in STEM subjects by 2% over the same period.

Figure 88: Numbers of FTE undergraduate students by gender and HESA cost centre, 2010/11
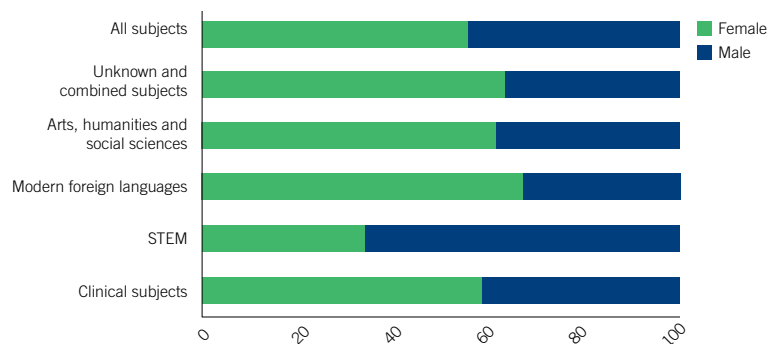
The gender imbalance in languages does not only affect higher education but starts in the school system. As shown in Figure 89, take up of French and Spanish in upper secondary education is skewed towards females in all parts of the UK. Only around one quarter of French classes in Scotland, and the

same proportion of Spanish classes in Scotland and Wales, is made up of male students. German is also highly gendered in Scotland but much less so in the other three parts of the UK. Entries for other languages are much less gender marked and more in line with general patterns of take up across all subjects.

Figure 89: Gender differences in entries for different languages across England, Scotland, Wales and Northern Ireland, 2012
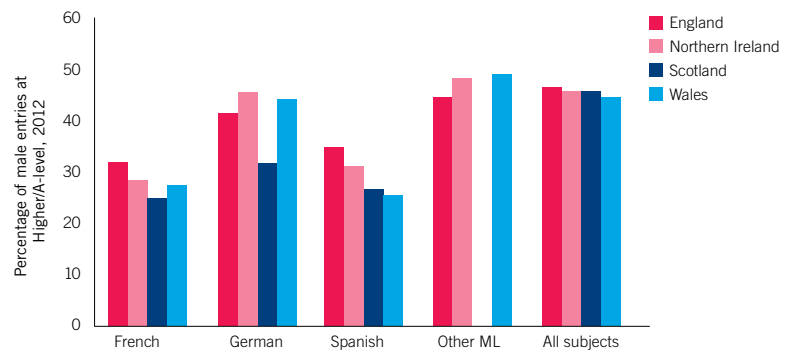
Sources: JCQ, SQA, 2012.

At GCSE and Standard Grade, a skew towards girls in language entries is also in evidence but less strongly. French and Spanish are the most markedly gendered languages across the UK and in Scotland at Standard Grade German is much less gendered than in England, Northern Ireland or Wales or at Higher level. Wales stands out as the country where boys are least likely to study languages at this level, with only 27% of GCSE entries for Spanish from boys.

4.4.6 Summary
This section shows that language learning is strongly associated with social advantage, starting from primary school and becoming particularly evident in achievement figures at GCSE, A-level and in acceptances to university courses. However, Chinese, Asian and Mixed Race pupils, and those who speak English as an Additional Language, are more likely to gain a good GCSE in a language subject than pupils whose ethnicity is Black or White, or who speak English as their first language.

The link between high participation in language learning and socio-economic status may explain the concentration of A-level entries for languages in London and the South East of England, and the relative under-representation of the other English regions in A-level language entries.

A greater proportion of females to males take languages and this disparity becomes more marked as learners progress through the system. At university, languages study is the most gender-marked of all subject groupings, yet this issue has received relatively little attention.

This section has mainly focused on England because of the availability of data. It would be useful to bring forward data from other parts of the UK to ascertain whether there are similar patterns.

4.5 Overall conclusions on the UK's capacity in foreign languages
This chapter has considered the overall supply of language skills, the situation as regards different languages, the way languages are combined with other subjects, and the social profile of those learning languages. It has shown that

although numbers studying languages in higher education are flatlining rather than in absolute decline, they represent a declining share of overall student numbers. The situation of languages in higher education is further endangered by significant falls in the numbers of students taking the subject at school level. This affects all parts of the UK but is particularly serious in Wales and is affecting some languages more than others. There has already been a clear loss of capacity in German, while other lesser taught languages struggle to gain a foothold in the system, held back by lack of teacher training opportunities.

Languages are overwhelmingly positioned as an academic subject, concentrated in the older universities. Whilst no one would suggest that high academic standards and scholarship in languages study is not important, the question here is about balance and the ability to cater for a wide range of students who will find employment in many sectors of working life. There are few applied language degrees and even fewer lower level courses in which a language can be combined with a vocational subject. Languages are associated with privilege, and are disproportionately studied by girls. White, male, monolinguals are significantly under-represented.

Chapter five

Conclusions for policy development

Chapter 3 set out the state of current knowledge as regards the demand for languages in the economy and labour market. Chapter 4 looked at language competence within the population and how UK education systems are contributing to this. This chapter compares evidence from the supply side with what is known about current and future demand for language skills, and draws some conclusions to feed into future policy development.

This chapter will follow the same structure as chapters 3 and 4, covering:

- the overall extent of supply and demand
- in which languages
- combinations of languages with other skills
- the social profile of those needing/learning languages.

It then draws some conclusions about the way the market for language skills is working and identifies the key issues arising.

5.1 Are there enough people learning languages to meet current and future needs?

The precise extent of language needs in the workforce has been difficult to quantify because of the amount of demand which is implicit or latent rather than expressly articulated by employers. However, there is strong evidence to confirm that the UK is suffering from a growing deficit in foreign language skills.

The review has found evidence of increasing demand for language skills, but at the same time strong indications that UK capacity is actually shrinking. The declines in entries to language exams at school level, despite some recent small signs of improvement, mean that overall there is a decreasing pool of students eligible to undertake language degrees in future years.

At the level of specialist linguist (the apex of the pyramid set out in section 3.1.10), there are identified shortages in interpreting (both public service and for international organisations) and in teaching. Professional bodies, major employers such as the European Commission, and government bodies such as the Teaching Agency, have taken action to bring forward a greater number of candidates, and in the case of the Teaching Agency are offering appropriate incentives. Although specialist linguist positions make up a relatively small proportion of all jobs with languages, recruiters need a large enough pool of candidates on which to draw as well as candidates with skills in the required languages. There is a particular and specific need for specialist linguists in the field of public service interpreting.

In many cases the need is for skills in more than one language. This review has not investigated the supply of dual linguists; however this would be a useful area to develop in a subsequent report in view of the European Commission's recent proposal to introduce benchmarks in language learning. One of these relates to the numbers of students learning a second foreign language.[294]

Specialist linguist roles are those which could be most easily targeted in skills planning, yet the reporting mechanisms for identifying the numbers of courses and students undertaking them, including their languages and specialisms, are inadequate and need to be improved.

Apart from specialist linguist roles, employers more widely are concerned about the general mindset and international awareness of potential employees. This comes through more strongly in the evidence than a precise articulation of demand for specific languages. They want to see a higher proportion of people overall to come into the workforce with at least a basic knowledge of languages they need. The British Chambers of Commerce has articulated this very clearly by calling for languages to be made compulsory for all up to AS level.[295] Similarly, respondents to the *Beyond English* survey carried out for this report identified the schools sector as the site for policy action rather than the further and higher education sectors which feed directly into the labour market. Their top priorities for policy action were making languages compulsory in primary schools and in secondary schools up to GCSE.

Improvements in overall language awareness and international sensitivity in the workforce would also help to address failings on the demand side – the market for language skills would work better if future employers were more language aware and better able to manage rather than sidestep the challenges of international communication.

Evidence from the Eurobarometer report and the European Survey on Language Competences shows that the UK is not developing the language skills of its population to the same extent as other countries do. However, some allowance needs to be made for the inordinate impact of English as a language of international communication, which is a major driver of policy and behaviour in language learning in other countries. Paradoxically, it is others' competence in English that brings them to the UK and the availability of their language skills which means that employers have less need to seek language skills in UK job applicants. The propensity of UK employers to source language skills implicitly by employing foreign workers thus not only raises the bar for British candidates who have to compete with them, but at the same time 'spoils the market' in language skills by disrupting national supply and demand mechanisms. This market failure is damaging to the interests of UK nationals.

5.2 How well does supply match demand in terms of the range of languages offered?

The report has shown that the teaching of languages in schools and universities is very heavily skewed towards the 'big three' languages, French, German and Spanish. It has also shown that these languages account for a large proportion

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294 The proposed benchmarks are a) 'by 2020 at least 50% of 15 year olds should attain the level of independent user or a first foreign language' and b) 'by 2020 at least 75% of pupils in lower secondary education should study at least 2 foreign languages'. European Commission, *Language Competences for Employability, Mobility and Growth* (Strasbourg, 2012).
295 British Chambers of Commerce. op. cit.

of demand, at least as much as half. At the same time, a very large number of languages are already in use in the workplace and the future focus of economic development will require an increasing number of new languages. Some of these languages already have a strong presence in the UK through families with an immigrant background. However there are marked discrepancies between the languages spoken by schoolchildren from these families, those taught in school and university and those identified as supportive of future economic growth. The charts below highlight these discrepancies, pointing to potential areas where action could be taken to 'join up the dots.'

Figure 90: Key languages identified as important in the labour market and their presence in schools and universities

Key languages currently required	Spoken by schoolchildren[293]	Taught in schools[294]	Available as degree subject[295]
Arabic			
Dutch	Small numbers	Assessed but not taught	
French			
German	Small numbers		
Italian			
Japanese			
Mandarin			
Polish		Assessed but not taught	Small numbers
Portuguese		Assessed but not taught	Small numbers
Russian			
Spanish	Strong in London		
Scandinavian languages: Danish, Norwegian, Swedish	Small numbers		Small numbers

Figure 90 shows that Polish and Portuguese are key languages for the labour market but are not taught in schools and are relatively poorly represented in universities. Russian, Arabic, Italian Japanese and Chinese could also be strengthened. The position of German, despite being one of the languages which is most needed in the labour market (by some measures, *the* most needed language), is in decline in both schools and universities and should be the focus of strategic recovery.

Figure 91 takes the languages of future growth markets identified in section 3.1.7 and maps them against the same criteria. This shows very clearly the mismatch between the strength of languages in the population relative to their position in the education system. None of these languages have a strong presence in the university sector and in some cases no presence at all.

Other languages spoken by relatively large numbers of children but which are not present either in schools or as degree subjects are: Albanian, Pashto, Somali and Tamil, and, in Scotland, Malayalam, Lithuanian and Latvian.

296   Green = one of the 10 most widely spoken languages as discussed in section 4.2.2. Amber = Other languages identified in section 4.2.2 and also in Eversley and others, op. cit.
297   Green = French, German and Spanish. Amber = other languages taught as set out in section 4.2.6. Red = not taught.
298   Green = Offered in more than 10 higher education institutions as per 4.2.3. Amber = Other languages offered as per 4.3.2. Red = not available as a degree subject.

Figure 91: Languages of future growth markets and their presence in schools and universities

Languages of future growth markets	Spoken by schoolchildren	Taught in schools	Available as degree subject
Akan			
Bengali		Assessed but not taught	Very weak
Cantonese			
Czech	Small numbers		
Farsi/Persian	Strong in London	Assessed but not taught	
Hausa	Small numbers		
Hindi/other Indian languages		Some assessed but not taught	Small numbers
Igbo			
Indonesian	Small numbers		Very weak
Kazakh	Small numbers		
Korean			
Malaysian	Small numbers		
Tagalog	Especially in London		
Thai	Small numbers		
Turkish	Strong in London	Assessed but not taught	
Ukrainian	Small numbers		Very weak
Urdu			Very weak
Vietnamese	Small numbers		Very weak
Yoruba	Strong in London		

Language education policy has much greater potential to be developed in ways which support the UK's aspirations for growth and global influence, whilst building on existing strengths. Just as the rebalancing of trade into new and emerging markets ought not to come at the expense of a contraction of the UK's share of existing markets closer to hand, similarly, language education policy should not seek to *replace* the languages traditionally taught with different languages perceived to be beneficial for the economy, but should rather expand to encompass a wider range of languages. Clearly there are also social, cultural and diplomatic factors to consider besides private sector economic interest.

The evidence presented in this review shows that the range of languages which are potentially needed is very broad indeed and there is a danger that so much diversity – too many choices, too much complexity – could lead to policy inaction. A strategic approach is essential in order to avoid wastage and to ensure synergy between different parts of the system. Current practice in French, German and Spanish will not necessarily be a model for what can be developed for other languages: a more nuanced policy is needed than simply grafting one or two new languages on to the existing educational frameworks. Nor will it be appropriate to apply the same solutions across the board to all the languages which have been identified. Countries and peoples are different in the extent to which they are able and willing to use English and the ease with which it is possible for the UK to develop a capacity in their languages also varies. The UK is not alone amongst the advanced economies in identifying the need to develop capacity in a wider range of languages: other countries are already developing policies on this and there is scope to learn from their efforts.

One approach might be to look at 'families' of languages where similarities between languages make it easier for those who have learnt one to gain competence in another. The current range of languages learned focuses mainly on Romance and Germanic languages and includes almost no languages from the Slavic or Semitic families or from the language families of Asia or sub-

Saharan Africa. This narrowness has an impact on supply in the workplace, since whilst someone who had learned Spanish at school would find it relatively easy to pick up Portuguese at university or in an employment context, the system does not provide the same base for other families of languages. This limits the flexibility to respond to inevitable changes in geopolitical and economic circumstances 10 or 20 years' hence. A strategic approach to language diversification would therefore take language families into account.

The 'inverted pyramid' model of language diversification (see 4.2.8) forms a good basis for further policy development and would be a more cost-effective way of improving supply in a wider range of languages than trying to embed too wide a range of languages from the start of primary school. It would imply, however that learners should have opportunities to learn more than one language as they progress through the system and should also be able to change languages. Opportunities to take up a second foreign language are crucial in broadening the range of languages learned, and the offer of 'tasters' in new languages has been shown to attract interest in take up of all types of language courses at university, including ab initio courses.[299]

The issue of the supply of public service interpreters in a diverse range of languages is a more pressing concern and the immediate solutions will need to be found outside the mainstream education system, although higher education institutions may well have a role to play. In the longer term, developing a more diverse languages base should ease such problems in future.

Checklist of considerations for diversifying language provision

- Flexibility – need to respond rapidly to changing geopolitical and economic conditions
- Local considerations – labour market needs and the concentration of different languages spoken by schoolchildren
- More than one foreign language
- A balance of families of languages – and taking advantage of opportunities to learn related languages more quickly
- Goals – linguistic skills, but also cultural and intercultural understanding, language learning techniques and strategies, knowledge about language(s), etc.
- Some languages are very hard to learn to speak fluently – balance between cultural awareness and pure language
- Developing centres of expertise for key languages.

5.3 How well are we equipping people with appropriate combinations of languages and other skills?

The need for languages in a wide range of employment sectors contrasts strongly with the low incidence of applied language degrees and opportunities to study languages alongside vocational courses. Yet employers say their biggest obstacle to recruiting staff with language skills is finding the right mix of languages and other skills.[300] Although languages are more often studied as combined degrees rather than as single honours, they are most frequently combined with other humanities subjects and, whilst these combinations may be extremely valuable in their own right, there is very little evidence of languages also being combined with subjects related to the sectors in which they are most in demand – IT, Finance and Creative/ Media/Marketing. Even allowing for under-reporting by institutions and activity in

299 SQW, *Evaluation of Routes into Languages*, 2011 www.routesintolanguages.ac.uk/sites/default/files/Routes report FINAL SENT 230611_0.pdf.
300 Tinsley, *Beyond English: Britons at Work in a Foreign Language. Findings from a Survey of Employer*s.

University Language Centres which falls outside the scope of available statistics, the figures of just 63 students combining languages with Computer Science, 66 with Accountancy and only 12 with a degree in Finance are extraordinarily low. There is a notable absence of careers advice mentioning the benefits of combining languages with such subjects.

Is it important that there is not a match between combinations of skills needed in the workplace and chosen subjects at university? Graduates' destinations and career pathways frequently do not coincide with the degrees they have taken, and people – graduates and non-graduates – change occupations and professional roles throughout their careers. Nonetheless, employability is a key issue now for universities and young people, and they, together with course providers and careers advisers, need to take into account the combinations of skills that are most required in the labour market.

The message that languages are needed not just in combination with other humanities subjects but with STEM and in more vocationally-oriented courses needs to be much more widely communicated.

5.4 Are we providing an appropriate cross section of people with language skills?

There are two separate but interconnected issues here, relating to the current social profile of people who study languages, and to the types of course available. On the one hand, the report has examined very strong evidence which shows that language learning is associated with privilege and higher socio-economic status, and that language courses tend to be concentrated in the older universities. At the same time it has shown that languages are needed at all levels in the workforce, not just in the most elite graduate jobs. There is a need to improve fair access to these elite universities and employment opportunities. But there is also a need to improve the match of supply and demand for language skills at the middle and lower end of the occupational spectrum. The structure of language provision appears to have developed on the assumption that it is only the academically able who are likely to use languages in their work. However this is not borne out by the evidence which shows that there is a need for language skills at all levels in the workforce and that some of the biggest skills gaps are amongst care workers, driving instructors and 'elementary' level staff.

This points very strongly to the need for action at school and college level to achieve a more even spread of language skills across the full spectrum of educational ability. Whilst policies such as the English Baccalaureate are already intended to address the issue of fairer access to elite positions for the academically able of all backgrounds, they may also reinforce the impression that language learning is of little relevance to the rest. However, the evidence here shows that language skills are highly relevant too for those who may not achieve the English Baccalaureate or go to university. The teaching of such skills may need to be conceptualised and taught in a different, more applied way. This should start with appropriate qualifications at 16 but should ideally continue through post-16 and post-19. Alongside this, and linked to it, there is a need to balance the gender gap and encourage more boys to gain proficiency in a foreign language.

Evidence on the social profile of language learners has been hard to come by for Scotland, Wales and Northern Ireland. Further research should be undertaken into this with a view to understanding whether the association with higher socio-economic status is as marked as it is in England.

5.5 The market for language skills

As this review has shown, the market for language skills is not working well. Market failure is due in part to lack of information: the way in which information is collected about demand for languages tends to underestimate need and does not take into account implicit, latent or (generally) future demand. Market failure is also due to the distance between decision-making and expected benefits: young teenagers who decide to give up languages do not generally take into account the needs of the labour market a decade hence and may have difficulty conceptualising how languages might be useful.

There have already been efforts to correct these problems through the provision of good careers advice, engagement with the university sector[301] and calls for the return of compulsory status for languages (thus delaying the point at which decisions are made).

However, the problem is deeper than this. The market for languages is not just failing, it is working negatively, providing disincentives to all the groups of stakeholders involved: policymakers, employers, education providers and learners.

The processes at work are set out in Figure 92. A poor and inappropriate supply of language skills (A) depresses demand: even employers who value language skills do not request them explicitly because they do not want to limit the field of applicants for jobs. Add to this (B) the indifference or monolingual habits of some employers, the tendency to sidestep language issues, plus the effect of employing foreign native speakers, and it is easy to see how the true extent of demand is not picked up in analyses of skills needs (C). Chapter 3 showed how such skills surveys identify language shortages as comparatively low risk without taking into account the potential high impact of communication barriers. Demand for languages is present throughout the economy, but thinly spread within each employment sector, meaning that there is no critical mass leading to demand for languages being strongly articulated. All this means that there is a relative lack of pressure on policymakers and on providers in schools, colleges and universities to take action on the supply side (D). It is a cycle of disincentive that needs to be addressed at each link in the chain.

Figure 92: Market failure in languages

D: No incentives for learners. No influence on provision. No pressure on policy

A: Insufficient and poorly-targeted language skills

C: Poorly identified demand, too thinly spread. Languages not prioritised for action on skills

B: Poor exploitation of language skills. Low expectations. Employers sidestep language issues
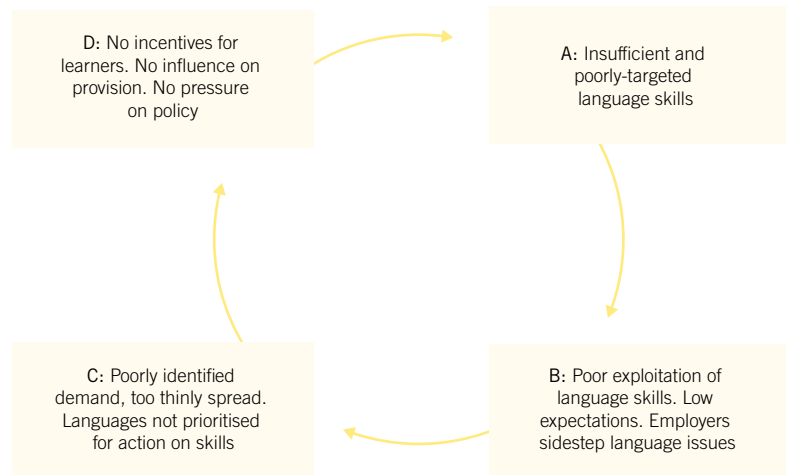
301 E.g. the Languages Work initiative which ran from 2004 to 2011, Routes into Languages, and the Russell Group's advice on 'facilitating subjects'.

Understanding this vicious circle of weak demand leading to declining supply, and the impact on all the key players, is crucial to addressing it.

Employers – need to have greater confidence of being able to find language skills in the right combinations with other skills. They need support in understanding and addressing their language needs.

This would make more explicit the current portion of demand for languages which is latent and therefore difficult to quantify and describe. This evidence could then be used by:

Policymakers –in order to address language issues holistically, instead of focusing mainly on supply side issues.

Course providers – to enable them to design and offer courses with languages which are relevant to the needs of the workplace.

Learners – to provide the information and incentive they need to take their language learning beyond the compulsory phase.

Previous policy initiatives have generally focused only on one group of stakeholders – for example, work to develop innovative courses and forms of accreditation, or promotional campaigns aimed at learners. The conclusion from this report is that each aspect of market failure needs to be addressed simultaneously and as part of an overarching strategy, in order to reverse the cycle of decline.

5.6 Key priorities for action

1 Develop a **strategic approach** to providing a **wider range** of languages for the workplace, adding to rather than replacing current provision.

INVOLVES
- Government
- Providers
- Employers
- Wider community

2 Increase the **number** and **social spread** of language learners in schools.

INVOLVES
- Learners
- Providers
- Government

3 Provide more courses at all levels which **combine languages** with the development of other vocational skills, including STEM subjects.

INVOLVES
- Providers
- Government
- Employers

4 **Stimulate demand** and **support employers** in the effective management of language skills.

INVOLVES
- Employers
- Government
- Providers

5 **Improve information-gathering** for identifying demand for languages in the economy and within specific industries, and the way that this is communicated to learners and course providers.

INVOLVES
- Government
- Employers
- Providers
- Other agencies

List of Tables

Appendix 1

Appendix 2

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Appendix one

Beyond English – Britons at work in a foreign language

Findings from a survey of employers

by Teresa Tinsley

October 2012

Contents

Acknowledgements

Executive summary

This report was commissioned by the British Academy as part of its Languages and Quantitative Skills Programme. It aims to add to understanding of the way foreign languages are used in the workplace, in order to support the development of policy and practice.

It is based on findings from a survey of UK employers known to be using foreign language skills in their work, undertaken by Alcantara Communications LLP with the support of Rosetta Stone during July and August 2012. It includes case studies of employers who agreed to be interviewed during the autumn of the same year.

The survey drew responses from 57 organisations representing all but one industry sector in the UK. Survey respondents included the public, private and voluntary sectors and all sizes of organisation from microbusinesses to very large multinational companies and public sector organisations. A key finding is therefore that foreign language skills are in use across all sectors of the UK economy.

Organisations were using a very wide range of languages: 45 languages were individually named as being in use, and many more were referred to without being identified specifically. However, the main European languages taught in UK schools and universities (French, German and Spanish) predominate. There is evidence of a link between the languages prioritised in our education system and intensity of economic and cultural relationships with countries where those languages are spoken. Policies to improve economic and cultural links with a wider range of international partners should perhaps therefore include plans to stimulate the teaching and learning of relevant languages as an integral part of the strategy.

The survey shows that staff at all levels use language skills not simply senior management. The message that languages are used and valued at operational level too implies we should step up efforts to achieve a better social balance in language learning. The very frequent use of foreign languages for e-mailing highlights the need not to overemphasise oral skills at the expense of the written language.

The survey paints an extremely diverse picture of language use. Skills in a wide range of languages are used across the full spectrum of economic life, for a wide range of functions, by employees at all levels in the system. Whilst this is a positive message, the diversity presents a challenge for skills planning. There is widespread use of the language skills of native speakers, a factor likely to depress the level of demand for language skills evident in national skills

shortage surveys. Some organisations which use language skills widely do not explicitly make them a requirement for recruitment.

There is a strong indication that demand for language skills will increase in future – both in the languages already frequently used and in others.

Respondents to the survey say that the greatest barrier to fulfilling their language needs is finding staff who can combine foreign language competence with other skills and attributes needed to do the job in question. Case studies make clear that languages are required in addition to, not at the expense of, other skills. However, the survey was not able to identify the most desirable combinations of sectoral skills and languages. Respondents believe that policy action should focus on general improvements to the level of foreign language competence acquired in school rather than specific action on skill combinations or different languages. The current government's policy for compulsory language learning in primary schools receives strong endorsement.

The survey shows that the need to go 'beyond English' is understood and acted on by this sample of employers. Foreign languages are being used as a necessity, not simply as a courtesy, and their value in securing competitive advantage and for relationship-building is understood and prized.

1. Introduction

This report was commissioned by the British Academy as part of its Languages and Quantitative Skills Programme. It aims to add to understanding the way foreign languages[302] are used in the workplace, in order to support the development of policy and practice. The report is based on the findings of a survey of UK employers known to be using foreign language skills in their work, undertaken by Alcantara Communications LLP with the support of Rosetta Stone. We are extremely grateful to all those who took part.

1.1 Policy context

The survey was commissioned at a time of renewed policy interest in language learning with new measures proposed by the Government at school level to make learning a foreign language compulsory in primary schools from 2014.[303] At secondary level, the Government seeks to boost GCSE participation in 'traditional academic subjects', including foreign languages, through the 'English Baccalaureate' – conceived as an overarching certification for students obtaining good GCSEs in a specified range of subjects.[304] Ministers have made it clear that the decline in students taking a language to GCSE is one of their key motivations for this policy. However, the focus on GCSE to the exclusion of other qualifications has meant a decline in business-oriented qualifications taken by students such as NVQ language units and very little language learning which is specifically work-related now takes place in either schools or colleges.[305]

In higher education, languages have been designated Strategically Important and Vulnerable subjects in recognition that market forces alone are unlikely

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302 The survey focuses on the use of languages other than English with the emphasis on foreign languages rather than languages which originated in the British Isles such as Welsh. It includes the use of languages which may be widely spoken in some parts of the UK (e.g. Urdu) which are sometimes known as 'community' rather than 'foreign' languages. For brevity we sometimes refer to 'languages' or 'language skills' – this should be taken to mean skills in languages other than English.

303 Department for Education (2012) Making foreign languages compulsory at Key Stage 2. Consultation.

304 Department for Education (2010) The importance of teaching. Schools White Paper.

305 Tinsley and Han (2012) Language learning in secondary schools in England. CfBT (2012) Language learning in the FE sector.

to deliver sufficient capacity to meet the needs of the country.[306] The move to put students 'at the heart of the system' has led to an increasing focus on employment prospects and statistics are being published to help students make choices about which subjects and courses to prioritise, given the high level of debt they will incur.[307] There is therefore a requirement for better information, for both students and course providers, about the way languages are used in employment contexts.

At European level, a recent report has called for better dialogue between employers and education providers on language matters in order to improve the match of supply with demand for language skills and support economic growth.[308]

1.2 Previous research findings

National Employer Skills Surveys undertaken by the UK Commission for Employment and Skills (UKCES) have historically shown a relatively low level of demand for language skills, although this has been increasing. Foreign languages emerge as the skill area which gives employers the least cause for concern, either in filling vacancies or in terms of perceived deficiencies in existing staff.[309] However, further analysis has shown that language needs are frequently underestimated by UK employers, either because they develop ways of working to circumvent the need for foreign language skills, or because they do not sufficiently appreciate the potential benefits.[310] The reliance on foreign nationals with language skills is also a factor.[311] Organisations such as the CIHE (Council for Industry and Higher Education) and the CBI (Confederation of British Industry) have highlighted the need for a more internationally-minded workforce in which the ability to understand other cultures and deal with foreign language situations plays an important part. The cultural and strategic benefits of language skills have been well-articulated by, among others, the British Academy.[312]

The National Employer Skills Surveys provide a rough comparison of the level of concern about deficiencies in language skills in relation to different occupations, in different sectors of the economy and across different regions. They show that concern about language skill deficiencies is highest in relation to the Administrative and Clerical occupations and Elementary staff[313] and that the greatest deficits are in the Finance sector, in Transport, Storage and Communications and in Hotels and Catering. London is the English region with the greatest deficits in foreign language skills.[314] However, these surveys do not provide a refined enough tool for understanding either the extent or the nature of employer needs for language skills – for example, there is no indication of which languages are needed. Research specifically on languages in employment has attempted to fill this gap.

This work was first developed in a comparative European context by Stephen Hagen who developed a methodology for identifying both linguistic and cultural

306 HEFCE (2011) Strategically important and vulnerable subjects.
307 http://unistats.direct.gov.uk/
308 European Commission (2011) Languages for Jobs. Providing multilingual communication skills for the labour market
309 UKCES, National Employer Skills Surveys (biennial).
310 See especially Doughty, (2011) La Grande Illusion. Why Scottish Further Education has failed to grasp the potential of modern languages.
311 CILT, 'Labour Market Intelligence for the Qualifications Strategy for Foreign Languages and Intercultural Skills', 2008.
312 British Academy (2009), Language Matters. A position paper.
313 These are 'elementary trades, plan and storage related occupations, and 'elementary administration and service occupations' (Standard Occupational Classification, 2000).
314 UKCES (2012) National Employer Skills Survey 2011.

barriers in companies involved in international trade.[315] This work was followed up in the early 2000s at regional level in the UK by a series of Regional Audits of language skills focusing on private sector demand for, and local supply of, foreign language speakers.[316] These provided rich data at regional level on which languages caused barriers for exporting companies and which languages were likely to be needed in future. They showed that there was a correlation between the supply of language skills – predominantly German and French – and the languages of the UK's main non-English-speaking trading partners.

The Audits found that the situations where languages were most needed tended to be when telephoning and in face to face meetings, where spontaneous, spoken language capacity is required. They also looked at where within the business there was a need for language skills and found that whereas staff with language skills tended to be concentrated at senior level, the greatest need was among staff who dealt directly with customers – in the sales team, among technical staff and also receptionists and switchboard operators. The current survey builds on the work of the Regional Language Audits by seeking information from a wider range of employers using languages – not simply exporting companies – and by bringing some of the survey questions up to date.

The Regional Language Audits were concerned above all with barriers to trade and potential losses to business and this approach was taken one step further by the ELAN survey carried out by UK researchers on behalf of the European Commission. By conducting identical surveys across 29 countries and adding in a macro-economic dimension this was able for the first time to estimate the extent of lost business across Europe as a result of shortage of language skills.[317] Research by the British Chambers of Commerce also highlighted the link between languages and export performance, creating a typology of exporting practices and identifying the most successful.[318] Another study of language management in multinational companies, which compared UK-based companies with counterparts in France and Germany, showed that UK companies were the most complacent about language skills and the least willing to use the language of their customers. However, a number of UK-based multinationals were found to have good language management practices and these were put forward as case studies.[319]

European-level research in this field was further developed through the Pimlico study which included case studies of good practice by successful exporting companies in a number of different countries,[320] and by the Languages Rich Europe project which showed the extent to which European companies in a number of specified sectors were employing positive language practices such as having a multilingual website.[321]

The most recent data on the nature of the use of languages in UK companies has come from the CBI's annual Education and Skills Surveys.[322] These provide an indication of which languages are required and – to a certain extent – which

315 See overview in Hagen, S. (2005). Language and culture in British Business. Communication, needs and strategies. CILT.
316 See Hagen, op. cit.
317 European Commission (2006) ELAN: Effects on the European economy of shortages of foreign language skills in enterprise.
318 British Chambers of Commerce (2003) The impact of Foreign Languages on British Business.
319 CILT (2005) Talking Sense. A research study of language skills management strategies in major companies.
320 Stephen Hagen, Report on Language Management Strategies and Best Practice in SMEs: The Pimlico Project, 2011 <http://ec.europa.eu/languages/languages-mean-business/files/pimlico-full-report_en.pdf> [accessed 2 November 2012].
321 www.language-rich.eu.
322 CBI (2012) Education and Skills survey 2012.

sectors of industry need them most. They go beyond the National Employer Skills Surveys by asking what purpose foreign language skills serve within the company and try to capture a broad picture of needs for future business development – not merely existing gaps. They make a distinction between the need for 'fluency' and 'conversational skills' – a distinction perhaps designed to identify the level of competence required but not subtle or precise enough to provide a clear picture. It also seems to presuppose that the skills required will be oral rather than written.

A recent British Chambers of Commerce survey on exporting looked at the capacity of British companies to enter international markets, and highlighted a severe lack of language skills which was at its most intense for the languages of the fastest-growing markets. It also confirmed previous findings that the availability of language skills influences business decisions about whether to enter international markets and that international social connections promote trade.[323]

All these findings, which have been fed into Labour Market Intelligence reports on languages and intercultural skills,[324] highlight the under usage of language skills in UK businesses, but also an enormous potential for development. Our survey seeks to inform such development by focusing on companies who are already using languages and by bringing to light further information about who is using them and how.

1.3 Survey aims and objectives
Our survey was aimed solely at companies and organisations known to be using languages, but unlike the Regional Language Audits, it includes public as well as private sector organisations and, amongst the latter, businesses using languages in a range of circumstances not simply exporting. The rationale for exclusively targeting organisations with experience in using language skills – the majority of which are existing customers of Rosetta Stone – was to focus on respondents who would be likely to be well-informed about language issues in order to be able to ask detailed questions about language use in their workplaces.

Like the Regional Language Audits and other research, we wanted to know which languages were used and in which sectors of the economy. In order to provide information for learners and course providers about which **combinations** of skills are useful in employment contexts, we asked which occupational roles within companies and organisations were most likely to be using languages – for example, whether languages were most associated with sales and purchasing or with the technical and production side of the operation. We also asked which roles within the organisation required a specialised knowledge of the language as opposed to general competence.

We were interested to dig deeper into the question of who in the company or organisation uses language skills and at what level. We wanted to bring to light further evidence on whether, as the Regional Language Audits seem to indicate, the greatest need for language skills is among operational staff rather than in the boardroom. If so, this has clear implications for language education policy, given that participation in language learning beyond the compulsory phase

323 British Chambers of Commerce (2012) Exporting is good for Britain.
324 See especially Anne Marie Graham, 'Labour Market Intelligence: Languages and Intercultural Working', CfA business skills @ work, 2012. Also A.M. Mulkerne, S. and Graham, 'Labour Market Intelligence on Languages and Intercultural Skills in Higher Education', University Council of Modern Languages, 2011 <http://www.ucml.ac.uk/sites/default/files/shapingthefuture/101/17 - Anne Marie Graham emp resource template_0.pdf> [accessed 15 October 2012].

is socially skewed in favour of the more privileged, and more so than in other subjects.[325]

As we have seen, CBI education and skills surveys have made an assumption about the need for oral as opposed to written skills and we wanted to see whether, given the ubiquity of email and the use of the written word on the web, this was indeed the case. We therefore asked respondents about the situations in which languages are used, updating the list of options used in the Regional Language Audits to include situations involving internet communications and tools such as video-conferencing. We also wanted to know how frequently staff use their language skills, whether and in which circumstances the foreign language is used intensively on a daily basis, or brought into play only occasionally.

We also asked respondents about the proportion of staff using languages and whether this would increase if language skills were more readily available. We asked how they supply their language needs, what barriers they encounter and whether they tend to recruit UK nationals or native speakers from other countries. We then asked respondents about future perspectives and their views on current educational policy priorities. Finally, we asked the reasons why they used languages other than English. To what extent is it to enable communication with others who do not speak English, or because they see it as offering a competitive advantage? How much is it a matter of relationship-building and showing respect?

1.4 Methodology

The survey questionnaire was developed by adapting and updating similar questionnaires that had been used for Regional Language Audits and European-wide research. It was made available online by Rosetta Stone using Survey Monkey and trialled by volunteers before being sent to target respondents.

The survey was targeted mainly at existing institutional clients of Rosetta Stone in the public, private and voluntary sectors, all employers known to be using languages and with an interest in developing them within their organisation. These companies and organisations were contacted by Rosetta Stone by email and invited to complete the survey. In addition, approaches were made by Alcantara Communications to a small number of other contacts in companies known to be using languages in their work. This clearly skews the results towards companies likely to have a positive view of languages, but this was deliberate as has been explained above, in order to achieve a broad understanding of how languages are used in employment contexts by those who best understand their potential. The link to the survey was published on LinkedIn and Twitter, and the Facebook page of Speak to the Future, the campaign for languages. This was more to raise awareness of the survey than in the expectation that it would deliver a large number of additional responses and accounts for the large number of visitors to the site who did not complete the survey. Rosetta Stone also sent out details in their August 2012 newsletter.

The survey was live from 6 July to 9 August 2012. During that time there were 664 views, 137 surveys started and 57 completed surveys. A number of contacts were also approached for individual in-depth interviews in order to provide case studies. These were selected to represent a range of practice in public and private organisations of different sizes working in different sectors of the economy.

325 Tinsley and Han, op. cit.

The analysis of the raw data, its interpretation, the follow-up interviews and the writing of the report was done completely independently of Rosetta Stone by Teresa Tinsley of Alcantara Communications.

2. Findings

2.1 Characteristics of respondents
Of the 57 respondents, 39 were private sector organisations and 16 were public bodies. Two were from the voluntary or charity sector. All sizes of organisation were represented, including micro-businesses, SMEs, large and very large organisations. The largest group represented was very large or multinational organisations with more than 2,000 employees. This contrasts with previous employer surveys on languages which have generally focused on SMEs (small and medium-sized enterprises). Previous studies[326] have identified significant differences in language management practices between SMEs and very large organisations and it was acknowledged from the start that great care would have to be taken in making generalisations on the basis of a small-scale survey involving organisations with such wide-ranging characteristics.

Figure 1: Size of responding organisations

Size of organisation/company	Responses
Micro (1-5 employees)	12
Small (6-50 employees)	9
Medium (51-250 employees)	10
Large (over 250 employees)	7
Very large/multinational (over 2,000 employees)	19
TOTAL	57

Whilst some responding organisations were only local in scope and some regional within the UK, most (42) were international (or at least European) in scope. It is pleasing to note that *all but one* (Real Estate) of the major industry groups as described by the UK Standard Industrial Classification of Economic Activities (SIC codes) are represented, albeit some only by one respondent. Other sectors represented (where respondents chose not to classify themselves under one of the SIC codes) were: Energy, Facilities Management, Relocation, Travel, Consulting and Market Analysis, Beauty and Pharmaceuticals and International Marketing. The respondents therefore represent a very wide spectrum of UK economic activity. The survey did not deliberately set out to achieve such broad representation and the fact that so many sectors of the economy are represented demonstrates the breadth of use of language skills in UK employment contexts.

2.2 Current extent of usage of foreign language skills
The extent of languages use within the responding organisations ranged from those where only a small number of individuals were using languages in specific roles (17) to those where at least 50% spoke foreign languages (3) including one very large organisation (more than 2,000 employees). In many cases (12), and in over half (10) of the very large organisations, between 10%

326 Alan J. Feely and Anne-Wil Harzing, 'Language Management in Multinational Companies', Cross-cultural management, 2002, 1–26.

and 25% of employees were using another language alongside English. The evidence collected therefore represents information about several thousands of employees possibly between 5,000 and 10,000.

Figure 2: Proportion of employees currently using languages other than English

Number of responding organisations

2.3 Strategies for languages

As can be seen from Figure 3 below, very few respondents' organisations (6) had a fully-developed, written strategy for languages;[327] however the largest group (24) said they were clear about which situations required foreign language skills and the expertise required. A further large group (17) said that decisions about language use were left up to individual managers and staff; others (5) said they were still at an early stage in developing their use of foreign languages. One respondent said that their medium-sized organisation working in the field of Arts, Entertainment and Recreation actively discouraged the use of foreign languages despite a high incidence of working with foreign clients. Despite this, French and German were used on a daily basis for sales and purchasing and, to a lesser extent, Spanish and Greek.

Figure 3: Strategies for languages

Number of responding organisations

The indication that very few UK companies have a developed strategy for languages use confirms findings from previous studies. For example, the ELAN study found that only 3% of UK exporters it interviewed had a languages

327 This was taken to include, for example: internal and external communications, recruitment, training, use of external specialist expertise, etc.

strategy (compared to an average of 48% in exporting companies across 29 countries). The existence of a strategy for communicating with foreign clients and partners was strongly associated with successful export performance.[328]

2.4 Which languages are most frequently used?
Respondents were asked which of 6 major languages they used and in which functions (see 2.5 below) within their organisation. These languages (Arabic, French, German, Italian, Mandarin and Spanish) were selected on the basis of having featured strongly in previous surveys of language skills and represent the UK's major markets and partner countries. Respondents were also asked to say whether each language was used 'occasionally', 'regularly' or 'daily', and to name other languages used in addition to the 6 suggested.

Figure 4: Languages most frequently used
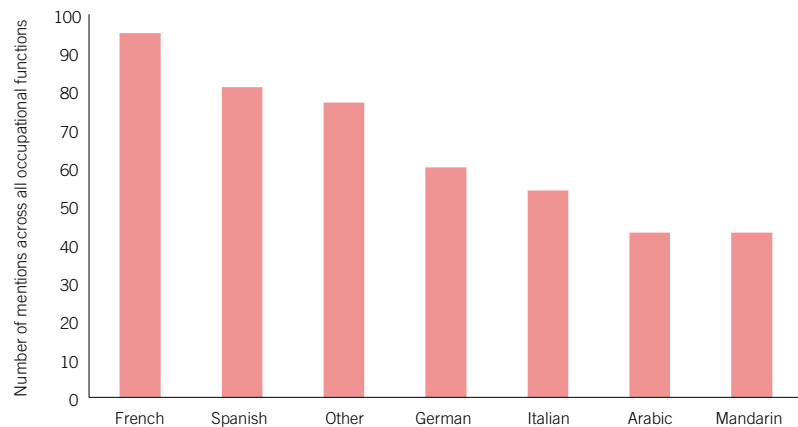
As can be seen from Figure 4, the languages most often mentioned by respondents were French, Spanish and German (in that order) followed by Italian and then Arabic and Mandarin. Other languages mentioned (the number of times shown in brackets) were as follows:

- Portuguese (6)
- Russian (6)
- Japanese (4)
- Greek (3)
- Swedish (3)
- Dutch (3)
- Danish (3)
- Turkish (2)
- Catalan (2)
- Norwegian (2)
- Farsi (2)
- Vietnamese (2)
- Indonesian (2)
- Dari (2)

As well as these languages, the category 'other' includes the following, mentioned just once: Afrikaans, Albanian, Basque, Bulgarian, Fijian, Finnish, Galician, Gujarati, Hebrew, Hindi, Kazakh, Kenyan (*sic*, presumably Swahili), Lithuanian, Malay, Nepalese,

328 CILT/Interact International, ELAN: Effects on the European Economy of Shortages of Foreign Language Skills in Enterprise, 2006 <http://ec.europa.eu/languages/documents/doc421_en.pdf> [accessed 19 October 2012].

Panjabi, Pashtun, Polish, Romani, Romanian, Somali, Thai, Urdu, Welsh, Yoruba. This brought to total 45 languages named specifically. Respondents also mentioned non-specifically 'Eastern European languages', 'Indian subcontinent languages', 'Baltic languages', 'Balkan', '80 languages' and 'all languages of sovereign states'.

Among the languages often described as 'community languages' because of their presence amongst immigrant or minority communities in the UK, Gujarati, Hindi, Farsi, Greek, Portuguese, Hebrew and others were all being used by private for profit organisations in international contexts. This challenges the view held by many that such languages are likely to be useful only in public sector employment contexts.

The results were then weighted as follows in order to ascertain whether certain languages were more likely to be used just 'occasionally' rather than regularly or on a daily basis: 1 = occasionally, 3 = regularly, 5 = daily. This weighting process produced exactly the same pattern of use as shown in Figure 4 above. We can therefore conclude that where languages are used, they are used with equal intensity: fewer companies and organisations our survey mentioned using Arabic than French, but where they did use it they were as likely as the French users to employ it intensively on a daily basis.

Twenty-two respondents said that the languages mentioned were sometimes used as a lingua franca to permit communication with speakers of third languages. Other languages were also used as lingua francas with Chinese, Spanish and Hebrew all mentioned in this connection. This confirms findings from elsewhere that the value of competence in a particular foreign language goes beyond simply being able to communicate with native speakers of that language, opening up wider possibilities for international communication.[329]

Because of the spread of types of organisation and industry sectors represented in the survey, and the small sample size, it was not possible to identify any patterns relating to the languages used in particular industries or in particular types of enterprise.

The findings show once again that the languages most frequently cited by companies and organisations using languages are those of large European nations which are most frequently taught in school and studied at university. Whilst this to a certain extent represents a supply-side skew, analysis of exporting behaviour indicates that activity is determined in part by language skills availability, combined with geographic proximity.[330] However, the extent of usage of Arabic and Mandarin that we see here – not far behind that of European languages, although much less studied in the UK education system – clearly indicates that demand side factors are at play too.

What is also significant is that very few companies or organisations which responded to this survey use just one language. Many commonly use two, but the largest group of our respondents were genuinely multilingual, using six or more languages. Where just two languages were used, the most common combination was French and Spanish, although there were some combinations of Asian languages too.

329 e.g. ELAN op. cit.
330 James Foreman Peck, 'Costing_Babel. The Contribution of Language Skills to Exporting and Productivity'.

Figure 5: Numbers of languages used by responding companies/organisations

Number of responding organisations

2.5 In which functions within the organisation are languages most commonly used?

Respondents were asked to say how frequently foreign languages were used to fulfil different functions within the organisation. As can be seen from Figure 6 below, the function within the organisation for which the languages were most commonly used was Service Provision followed by Sales and Purchasing:

Figure 6: Frequency of use of foreign languages in different organisational functions

Number of mentions across all levels in the responding organisations
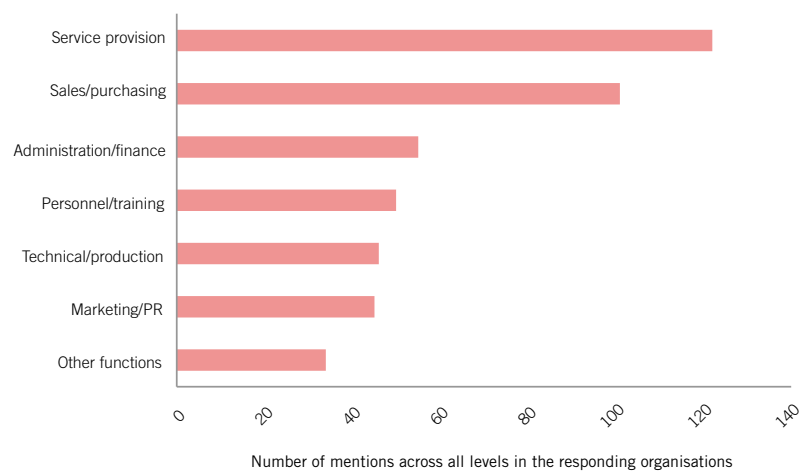
Languages were used least in Marketing and PR, even less than in Personnel and Training. Figure 7 below shows the extent to which different languages are used to fulfil the various functions within the responding organisations. As can be seen, all the named languages – and more – are used in all organisational functions and in approximately similar proportions. However, the incidence of using Arabic is relatively more common in the Technical/Production function and the use of German and Italian less so. Spanish and Italian are proportionately more commonly used in the Sales and Purchasing functions and Mandarin and Arabic less so.

Figure 7: Frequency of use of different languages in different organisational functions.

Number of mentions across all levels in the responding organisations
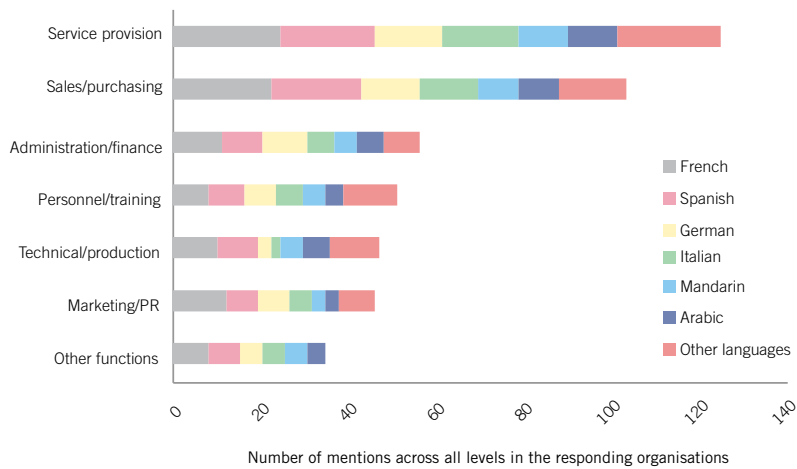
The most common language/function combination is French in Service Provision, followed by French in Sales and Purchasing, while the least common combination is the Technical/Production function in German. These patterns probably reflect the type of engagement with different overseas markets/clientele, and also the degree to which it is possible to use English.

It is an interesting reflection on our service-oriented economy (as well as the inclusion of public sector bodies in the survey) that languages are reported as being used most often for actual service provision – the point in the business where people have to communicate directly. Examples of this in our survey include the financial or business services sectors, transport and communications and the hotel industry. It is less surprising to see that languages are also used frequently in the Sales and Purchasing functions of an organisation, as has been shown in previous surveys of exporting companies.[331]

2.6 How frequently are foreign languages used?
Foreign languages in the responding companies are most commonly used on a daily basis (in around 50% of cases). If they are not used on a daily basis, they are more likely to be used 'occasionally' than 'regularly'. This pattern is the same for all languages in all functions.

2.7 For which purposes are languages used?
Respondents were asked in which situations languages are used by which staff, and how frequently. Figure 8 below shows the total number of mentions for each situation. It shows that the most common situation in which languages are used is still for telephone calls (as was found in the Regional Language Audits in the early 2000s), although emailing comes a close second. Third in frequency is meeting visitors. It is far more common for staff to use languages in business meetings face to face than in a video conference, and very few companies in our sample expect staff to make presentations in a foreign language.

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331 Mulkerne, S. and Graham A.M.

Figure 8: Situations in which responding organisations most commonly use foreign languages

Number of mentions across all levels of staff
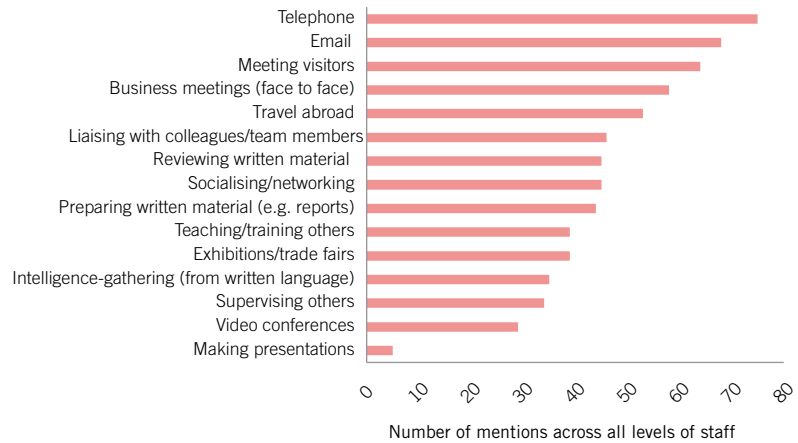
As can be seen from the importance of email and other situations involving reading and writing, written competence is needed as well as oral skills in the language. Employees use the written language for preparing and reviewing written material and for intelligence-gathering. At the same time, oral skills are needed for core business functions not simply to build business relationships through socialising and networking. From this list we can deduce that productive skills (writing and speaking) are likely to be as necessary as receptive ones (listening and reading), though additional research would be needed to test this hypothesis.

2.8 Which grades of staff use languages the most?
Respondents were asked to say how frequently staff at different levels in their organisation (operational, middle management or senior management) use languages in each of the situations listed above. The results in Figure 9 below show that the pattern of usage of languages is practically identical for all levels of staff and that operational staff use languages to make telephone calls, communicate by email and meet visitors as much as senior managers do. All three levels of staff use languages in all the situations given, employing both oral and written skills.

Figure 9: Use of languages in different situations by different levels of staff

Number of mentions by responding organisations
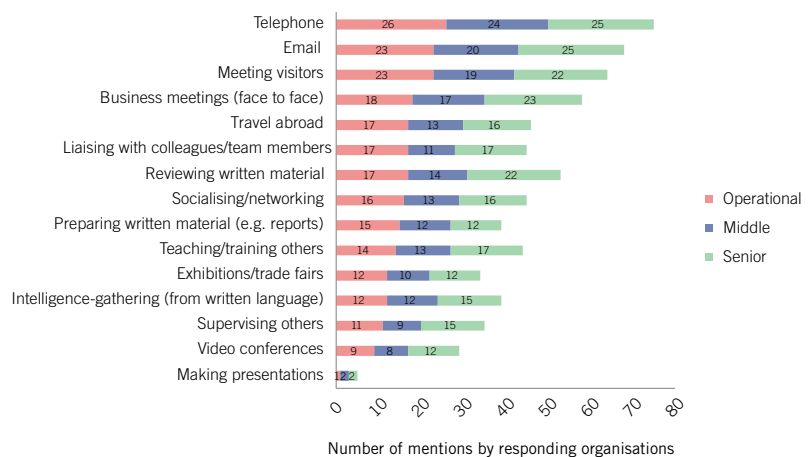
As can be seen from Figure 10 below, senior staff appear as the group that uses languages in the most situations, followed by operational staff, while middle managers appear to use languages in the fewest situations. However, these differences are small and may not be at all significant given that the micro-organisations represented in the sample are unlikely to employ middle managers. Senior managers appear slightly more likely to travel abroad, to use languages for intelligence-gathering and to prepare written material in the foreign language. This pattern is identical when results are weighted as in 2.4 above to allow for different intensity of use (occasionally, regularly, daily).

Figure 10: Use of languages by different levels of staff

Level of staff within responding organisations
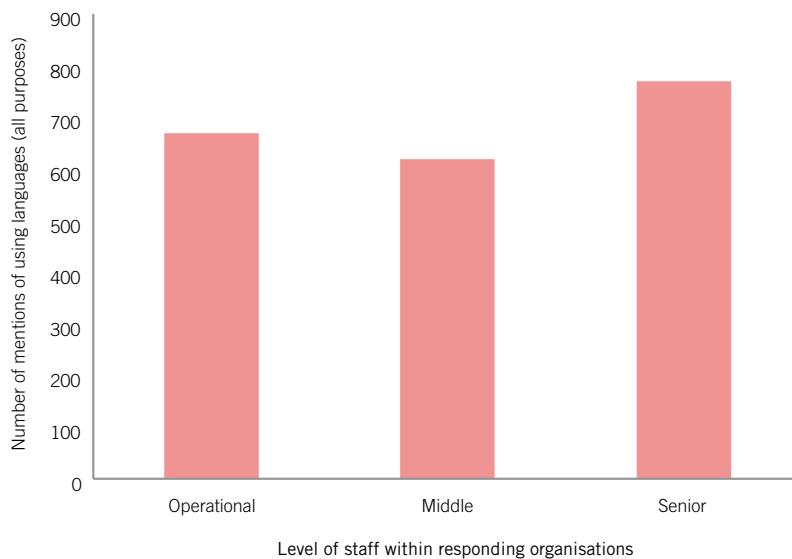
An important conclusion therefore is that languages are used at all levels in working life and not simply at the higher levels in a company or organisation. This confirms the findings of the Regional Language Audits that language skills are needed at an operational level, although we do not see evidence here that they are used *more* by operational staff than by senior management. However, it must be borne in mind that there are generally many more operational staff than senior managers in a company or organisation and that therefore in terms of *numbers* of staff, those at operational level are likely to predominate. Previous research has shown that having senior staff with foreign language skills makes a significant difference towards the use of languages within the company: there is likely to be a more structured approach and more positive attitudes generally for example at recruitment.[332]

2.9 How intensively are languages used in different situations?
We asked whether, for each situation and at each level within the organisation, languages were used 'occasionally', 'regularly' or 'daily'. We found that when languages were used in the most commonly reported activities, such as speaking on the telephone, meeting visitors and business meetings, this was more often 'occasionally' than 'daily'. However, use of languages for socialising and networking, intelligence-gathering and preparing or reviewing written material was more likely to be on a daily basis than just occasionally.

332 Stephen Hagen, Language and Culture in British Business: Communications, Needs and Strategies (CILT, the National Centre for Languages, 2005).

2.10 Which job roles require a technical or specialised knowledge of the foreign language?

Responses to this question showed that staff involved in Service Provision and in Sales and Purchasing were more likely than those in other occupational functions to need specialist knowledge of the language over and above general competence. The groups most likely to need language skills relevant to their specialist field are shown in Figure 11:

Figure 11 – Job roles and levels most likely to require a specialist knowledge of the foreign language

Staff grade and function	Number of mentions
Operational staff involved in Service Provision	15
Senior managers in Sales and Purchasing	10
Operational staff in Administration and Finance	10
Operational staff in Technical/Production	9
Middle managers in Marketing and PR	9
Operational staff in Sales and Purchasing	8
Middle managers in Sales and Purchasing	8

Other groups were less likely to need a specialised knowledge of the language going beyond general competence (7 or fewer responses).

2.11 Which skill combinations are required in addition to languages?

Unfortunately the results of the survey shed very little light on which specific skill combinations are most sought after by employers. In part this is due to the very broad spread of occupational sectors represented by respondents – for example, in relation to the findings in 2.10 above, 'service provision' means something very different for a bank than for a hotel. In part it is also due to the small size of the sample, although clearly if we had found respondents clustering around a small number of industry sectors – for example, finance or IT, where many jobs with languages tend to be advertised,[333] we may have been able to draw some firmer conclusions. The very wide range of languages identified also adds to the complexity of the picture and it seems unlikely that even wide scale quantitative surveys would be able to provide a decisive message on the most productive combinations of languages with other specialist vocational skills. This is unfortunate as it tends to block an informed dialogue with skills sector planners. However there is a clear indication of the need for generic administrative and management skills in association with a foreign language – for example, initiating telephone conversations, negotiating, passing on instructions, checking the accuracy of information received, summarising actions at the end of a meeting. These and other considerations could feed into a much more strategic approach in planning for language skills in employment – see conclusion.

2.12 How do employers assess the language skills of staff or recruits?

As can be seen from Figure 12 below, relatively few (16) employers test their staff's language skills; most rely on looking at their qualifications and experience (33). A small number (9) use management appraisal as a way of assessing language skills.

333 See Mulkerne and Graham (2011). Labour market intelligence on Languages and Intercultural Skills in Higher Education, UCML.

Figure 12: Ways in which respondents assess the language skills of staff or recruits
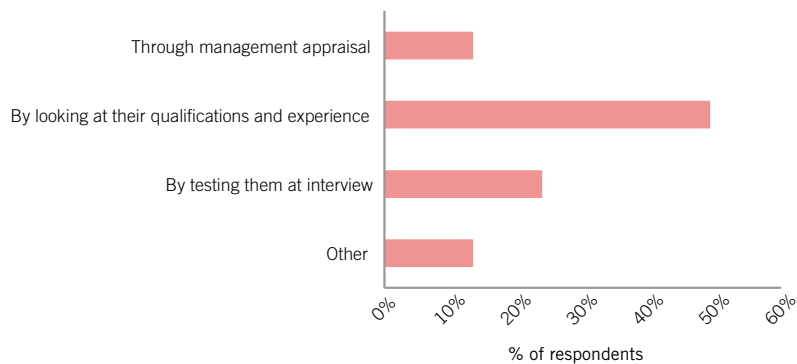
The survey asked to what extent employers used various national or international tools for measuring staff's linguistic or cultural competence. Findings – shown in Figure 13 below – show that use of these tools is relatively low. However, 12 in our sample use the Common European Framework of Reference for Languages; this more than double the number that use the National Occupational Standards for Languages (5) and may indicate that internationally-recognised standards are more relevant than national ones for language competence. None of the respondents use the National Occupational Standards for Intercultural Working – a tool which could be of interest given the evident importance respondents give to language skills for relationship-building. Other tools mentioned are the JF standard,[334] the Japanese Language Proficiency Test and the Mandarin Chinese Proficiency Test.

Figure 13: Tools used to measure staff's linguistic or intercultural competence
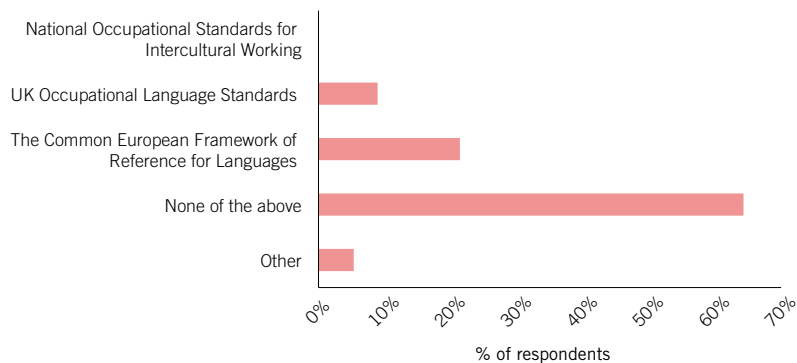
The relatively small use made of tools for measuring staff's linguistic competence may indicate that employers do not need such tools or that those that exist are insufficiently known or not suitable for their purposes - further research would be needed to confirm this. Given that this group of employers was selected on the basis of their likely expertise in using language skills, it is surprising that so many rely on looking only at qualifications and experience. There must be a possibility that these and other employers are not getting a clear picture of their employees' language competence and are not therefore able to exploit it or develop it appropriately.

2.13 How do employers fulfil their language needs?

As we have seen above, the recruitment of native speakers has been seen to depress the market for UK nationals with language skills. It is therefore significant that more employers responding to this survey say they mainly fulfil their language needs by employing native speakers with good English (21) than by employing UK-born and educated staff with language skills (11) – see Figure 14 below. A relatively small number (8) train staff in languages, and even fewer (6) use outsourcing as the main way to fulfil their language needs. The small proportion offering language training is surprising given that most of the sample was found through Rosetta Stone. It is not clear whether employers would prefer to employ UK nationals if they had the appropriate language skills, or whether they believe foreign nationals are more suitable for other reasons. One respondent commented that native speakers were not always good at correcting mistakes in their own language. Previous research has shown that native speakers are an extremely valuable resource for breaking into foreign markets.[335] and their use should not necessarily be seen as limiting opportunities for UK job applicants with languages, in fact it may even increase them in the medium to long term by helping companies to internationalise.[336] However, the widespread use of foreign nationals may go some way to explaining why language skills do not figure highly in skills shortage surveys.

Figure 14: Ways in which respondents fulfil their language needs

% of respondents

2.14 What are the greatest obstacles in fulfilling language needs?

As can be seen from Figure 15, over a quarter of respondents felt that the greatest obstacle to fulfilling their language needs was finding recruits who had language skills in addition to other skills and attributes necessary to do the job. This finding confirms previous research findings which have stressed the combinations of skills needed by employers who are not looking for language skills alone, but as part of a package alongside other workplace skills. Another important obstacle for some organisations (17) was the difficulty in recruiting for specific languages. The level of competence of staff in the languages they spoke was also seen as an obstacle albeit not by so many respondents (11). A small number of respondents noted the possible reluctance of staff to undertake language training (5) and the cost of such training was also a barrier (12). It is telling that, in one third of cases, difficulties in fulfilling language needs had impacted on the success of the organisation. This is despite the incidence of native speaker recruitment noted above.

335 See CBI/Ernst and Young (2011) Winning Overseas, p. 31.
336 European Commission, Internationalisation of European SMEs, 2010.

Figure 15: Greatest obstacles in fulfilling language needs

2.15 What measures should be taken to overcome these obstacles?
Respondents were asked to select from a list of possible policy options, those that they thought would have most impact in addressing these obstacles. As can be seen from Figure 16 below, compulsory language learning in the primary school (27) or up to GCSE (21) were seen as likely to be the most effective measures. Respondents also thought there should be more support available for adults to improve their language competence (20) and that more should be done to raise public awareness about the value of language competence (17).

Figure 16: Policy measures recommended by respondents to improve the supply of language skills
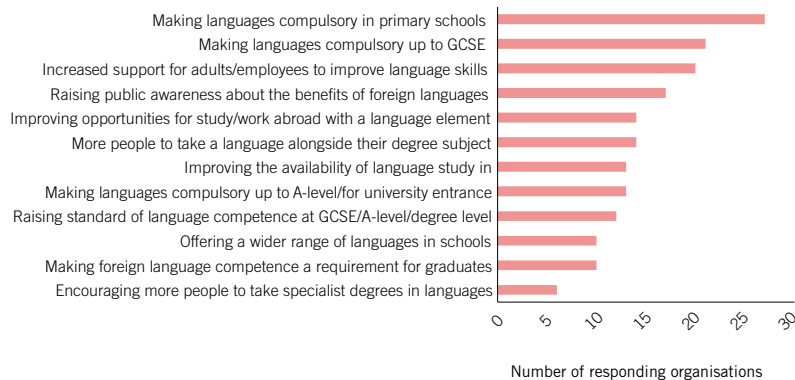
Respondents see the policy solutions for languages as being in primary and secondary education (and to a lesser extent in adult education) rather than in the further and higher education sectors which feed directly into the labour market. This represents an endorsement of current government policy, although answers may have been skewed by the current public debate on language skills which has focused on the school curriculum. It is interesting however that they prefer a general solution – upgrading language skills amongst the populace at large, rather than one which is specifically targeted at the types of employee they would like to recruit. The call to raise public awareness of the value of language skills is of course something in which employers themselves should be closely involved.

2.16 Do employers expect their language needs to change in the near future?
As can be seen from Figure 17 below, half of respondents (25) expect their language needs to increase in future, and only one expects them to decrease. Of

those expecting their needs to increase, 12 say they will need more staff in existing languages and 13 expect to need a wider range of languages. Ten expect to continue with the same level of use, but foresee the balance between languages changing. The rest (15) do not expect their needs to change. On the basis of evidence from this, admittedly small-scale, sample, there appears be a growing need *both* for the languages currently used *and* for a more diverse range of languages.

Figure 17: Respondents' expectations of future needs
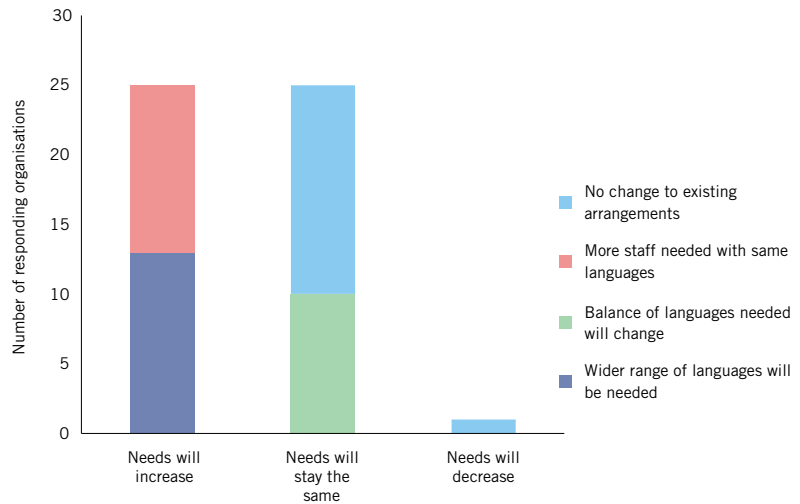
2.17 What is the potential future scale of language use within the responding companies?
In addition to asking respondents what proportion of their staff were currently using foreign language skills, we asked them what proportion would potentially be using them if they were more readily available.

Thirty-one respondents said that, even if language skills were more readily available, the same proportion of staff within the company would be using languages, although in 9 of these companies, all staff were already using languages. Twenty-one respondents said that their usage of languages would increase. The extent of this potential increase in language usage is shown in Figure 18 below:

Figure 18: Potential for greater use of languages, if skills were available

Current extent of language usage within the company or organisation	Number of companies	Potential extent of usage of language skills
Only a very small number of individuals in specific roles	9	5 would have 5-10% of staff using languages 4 would have 10-25% of staff using languages
A small proportion of staff – around 5-10%	3	2 would have 10-25% of staff using languages 1 would have around one quarter to one third of staff using languages
Between 10% and 25% of the workforce	7	4 would have around one quarter to one third of staff using languages 3 would have between one third and half of all staff using languages
Around one quarter to one third of staff	1 large public sector organisation	This organisation would want to move to a majority of staff (over 50%) using languages
Between one third and one half of staff	1 very large private sector company	This company would want to move to a majority of staff (over 50%) using languages
A majority of staff – over 50%	1 very large private sector company	This company would ideally want virtually all staff to be using languages

Although this is only a very small sample of companies, it clearly shows that there is untapped potential for language skills to be used on a much wider scale than currently, if they were more readily available within the workforce. It can also perhaps be interpreted more negatively as evidence of complacency or even defeatism on the part of employers. As we have seen in 2.15 above, language competence appears to be something respondents expect education systems to provide, rather than something for themselves to take an active role in developing.

2.18 What motivates employers to use languages other than English?
Despite the supposed ubiquity of the English language, the strongest motivation for using other languages amongst the employers surveyed is that others do not speak English. In these cases (14), the use of other languages is an absolute necessity for communication. Other respondents (10) see the value of using other languages as offering competitive advantage. Others used foreign languages to communicate respect (9) or for relationship-building (10). Only a few (4) see the need for language skills in being able to access information not readily available in English.

Figure 19: Reasons why responding organisations use foreign languages

Number of responding organisations
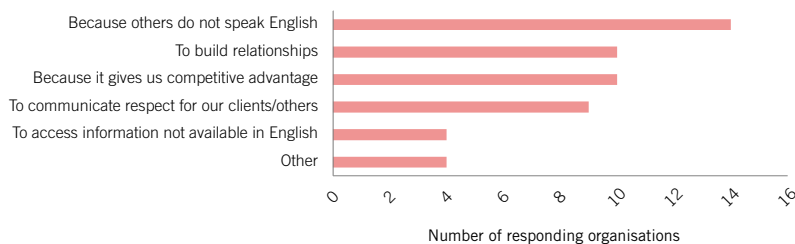
Comments in relation to this question included:

- We are a global business with offices in many countries and we speak the local language
- We are a customer service centre covering the whole Nordic region
- To allow us to penetrate and develop sales more quickly and more deeply in our overseas markets.

3. Case studies

The case studies below are the result of telephone interviews with key individuals in each company or organisation. Not all had completed the online survey. There is a bias towards companies which provide language training, probably as a result of most of the contacts being made via Rosetta Stone.

3.1 B&Q
B&Q is a leading home improvement and garden retailer and employs around 1,000 staff at its head office in Southampton. Although popular wisdom is that foreign languages are needed for sales and that 'you can buy in your own language', the language need in B&Q is for purchasing. By teaming up with partner companies abroad, it can buy from across the whole European market and thus gain an important commercial advantage.

The company is part of the Kingfisher group and works closely with sister operating companies in order to pool buying power from across the group. In the last two years the Southampton buying teams have started to work

intensively with the French company Castorama and in doing so have found a need to use French. Services and Training Manager Mark Giles says that while senior managers might speak good English, deeper in the organisation this is not the case. The company also needs some German, Polish and Russian for similar relationships with other companies within the group.

Languages have not in the past figured in recruitment policies, although the company is starting to be more conscious of this now. The company therefore offers in-house training in French, provided by a local specialist training company. Some 50 staff are currently receiving training in French and a smaller number in other languages. This is to fulfil an immediate need, not as a general professional development opportunity or designed necessarily to assist promotion within the group of companies. Some staff already have a good GCSE or A-level French but require more business-oriented language, for example, they need to be able to talk about figures, statistics, and products in order to agree on joint deals with counterparts in France. Others are learning the language from scratch.

The case of B&Q illustrates how language competence supports commercial activity in ways which are not necessarily obvious to outsiders.

3.2 Bosch UK Ltd

Bosch is a global engineering company with its headquarters in Stuttgart, Germany. It employs over 4,000 people in the UK at 36 locations including Denham, Worcester, St Neots, Stowmarket and Glenrothes. The Bosch Group comprises subsidiaries in 60 countries and its company language is officially English. However, staff who have dealings with the company head office, including many senior managers, require German – this may be up to a quarter of staff employed in the UK. As day to day contact with head office increases, so the need for competence in German is growing – mainly among engineers and sales staff but also in HR and IT functions. Alistair Cumming, Head of Training and Personnel Development, says that the need for German becomes evident when emails are forwarded – although the request to the individual is formulated in English ('Can you deal with this?') the email trail below is in German. As a result, around 150 UK staff are currently undertaking training in German. In addition, certain senior managers on a particular career path within the company are required to work abroad for 2 years, and this requires language skills. Where this involves placements in third countries, other languages come into play and intensive training is provided in languages such as French, Chinese and Malay. However, Bosch does not make language competence a requirement at the recruitment stage. The company says that this would be too limiting as regards the choice of applicants: language skills are not required at the expense of other skills the company values. However, the company recognises that those who have learnt German at school are better-placed to pick up the language quickly through the training they provide.

3.3 Foreign and Commonwealth Office

Language capability forms an important principle within the Foreign and Commonwealth Office's new 'excellence in diplomacy' policy. In a speech in July 2012, Foreign Minister William Hague set this out as follows: 'We need more skilled diplomats…who are able to get under the skin of those countries, who are immersed in their language, culture, politics and history and who have access to decision-makers and can tap into informal networks of influence.'[337] In order to achieve this, the FCO has increased both the budget for teaching

337 Diplomatic excellence in the 21st century, William Hague speech 9 July 2012.

languages and the number of posts designated as 'speaker slots' for which languages are an absolute requirement. It has also raised the bar on the level of language competence which diplomats are expected to achieve. For most posts this is now what is internally designated as 'operational level', a high level of competence equivalent to level C1 on the Common European Framework of Reference. Full-time training is provided for staff who will occupy these positions, which are generally at management rather than administrative grades. The FCO allows 22 months full-time to achieve level C1 from scratch in languages which are difficult for English speakers to learn, such as Arabic and Chinese. This includes a year living in a country where the language is spoken. For languages which are more similar to English, such as Spanish, the time allowed is 7 months. Speaking is an essential skill for all profiles, and reading and listening are generally also required. Writing is only relevant in some profiles although it is generally included as part of the training programme as a way of assisting the development of the other skills. Diplomats do not generally write in the foreign language as this task is generally carried out by local staff, who are native speakers.

In addition to this focused training for specified diplomatic positions, the FCO also runs other training programmes. Spouses, and diplomats in positions where language skills are an advantage rather than essential, undertake focused training up to level A2. There are also continuous development opportunities to attend language classes in key diplomatic languages. These are: Arabic, Chinese, Farsi, French, Portuguese, Russian, Spanish and Turkish. Language programmes provided by Rosetta Stone are available as an additional facility.

Despite the high value it attaches to language skills, the FCO's recruitment policies do not require language competence or use it as a discriminating factor at recruitment: this is seen as inimical to ensuring equal opportunities. However, internally it uses the Modern Languages Aptitude Test alongside other measures as a way of identifying staff likely to benefit from intensive language training.

3.4 New Era Aquaculture

New Era Aquaculture is an expanding new manufacturing business currently employing 20 staff at its base in Thorne, near Doncaster. Established 7 years' ago, it specialises in dried fish food which it supplies to the retail trade and public aquariums in 35 countries. So far all the overseas business has been handled by the Managing Director, Peter Kersh, who speaks Spanish, French, Portuguese and Italian, with a little German. However with the business growing at 40% per year, the company expects to need an export manager soon and will be looking for a linguist. The company outsources translating for labels and product brochures and is now working on making its website multilingual – it expects initially to need online information in Spanish, Italian, German and French. Mr Kersh had recently returned from Valencia where he was pitching for a contract to supply the biggest aquarium in Europe. He hopes that his presentation in Spanish will have clinched the deal.

3.5 Gatwick Airport

As one of the world's busiest airports, serving more than 200 destinations, Gatwick Airport is a quintessentially international environment. Its 2,200 employees have to ensure that 34 million passengers a year are transferred swiftly and safely to their destinations, minimising the stress and disorientation which so often accompanies air travel.

As part of its commitment to customer service, the Airport has instituted language training for staff in the front line of dealing with the public. Those helping passengers through security, or assisting with information to make sure people can find their way around, choose from a range of the languages most commonly needed at the airport. They learn basic language relevant to their role, such as 'liquids' or 'sharp objects' and, after successfully completing the course, their language skills are recorded so that they can be called to deal with typical communication problems which may arise. Participants are of all ages and come from a range of backgrounds: some have university degrees, others lower level qualifications. The Airport also directly employs a small number of specialist linguists, who cover a variety of languages between them. These are called to interpret when more complex situations arise. In the past the Airport simply drew ad hoc on the language skills of its employees. Now there is a much more strategic approach, with the training organised in partnership with the union, Unite.

3.6 Conclusions

These case studies of employers using languages in a variety of ways provide evidence that language skills benefit both companies and the individuals within them. New Era Aquaculture has grown from scratch to become a thriving international business thanks to the language skills of one linguist entrepreneur. These examples show how languages are needed for successful international engagement, whether for business or for diplomacy, but that they are required in addition to, not at the expense of, other skills. None of the employers interviewed had recruited specifically for language skills and, in the case of the two multinational companies, the need for language skills had been perceived post hoc. In the case of B&Q, this was in order to derive full commercial benefit from belonging to an international group, and in the case of Bosch UK, when the company policy of speaking English was found not to work in practice. The case of Bosch UK shows how language skills may be a requirement for individuals to progress within such companies.

4. Summary and conclusions

Although the survey included only a relatively small number of organisations, a very wide spectrum of the UK economy was represented. There is evidence from other sources which shows that the sector not represented in the survey – Real Estate – also uses language skills.[338] We can therefore state categorically and possibly for the first time that foreign language skills are in use across all sectors of UK economy. As well as representing, quite serendipitously, all but one industry sectors in the UK, survey respondents include the public, private and voluntary sectors and all sizes of organisation from microbusinesses to very large multinational companies and public sector organisations.

The range of languages used is correspondingly broad. Forty-five languages were individually named as being in use, and many more were referred to without being identified specifically. Organisations do not tend to restrict themselves to working in just one or two languages: large and very large organisations in particular use a very wide range of foreign languages. It appears that once the benefits of going beyond English are perceived, organisations operate as multilingually as possible. The range of languages in use includes many languages which are widely spoken by British people or

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338 An article in the Estates Gazette ('The new recruits', 1/9/06) quotes the MD of a large Chartered Surveying firm as recently having taken on 73 graduates of who just under half were fluent in a foreign language.

UK residents with a foreign background or heritage but which do not figure prominently within our education systems. There is an obvious case to be made for the better recognition, development and certification of such skills, which are shown here to have a clear economic value. However, the main European languages taught in UK schools and universities (French, German and Spanish) predominate in our survey. This is possibly in part simply because these languages are more readily available - however there is clearly a link between the languages prioritised in our education system and intensity of economic and cultural relationships with countries where those languages are spoken. We suggest therefore that any policy to improve economic and cultural links with a wider range of international partners should included plans to stimulate the teaching and learning of relevant languages as an integral part of its strategy.

The survey confirms findings of previous research that the need for foreign languages skills is not simply for the elite of senior management: staff at all levels use language skills. These messages provide a wake-up call for the education system and careers advice in which languages may all too often be presented as only relevant to those students intending to become interpreters or translators or destined for senior management positions. The message that languages are used and valued at operational level too implies we should step up efforts to achieve a better social balance in language learning. This message can also be seen as a positive one for graduates at the beginning of their careers, provided they have other skills and attributes to offer alongside languages.

The picture of language use that emerges from the survey is one of extreme diversity – skills in a wide range of languages are used across the full spectrum of economic life, for a wide range of functions, by employees at all levels in the system. Whilst this conveys a positive message in demonstrating the contribution that language skills are making across the economy as a whole, this very diversity presents a challenge for skills planning.

The survey appears to confirm findings from other sources that there is no concentration of demand in any one sector of the economy or type of job, while the range of languages in use is very broad, all factors which inhibit strong calls to action. The use of native speakers is very common amongst the organisations responding to the survey and this may be a factor which depresses the level of demand for language skills evident in national skills shortage surveys. Some organisations which use language skills widely do not explicitly make them a requirement for recruitment.

However, findings from this survey provide a strong indication of future increasing demand – both in languages already frequently used and in others.

Respondents to the survey say that the greatest barrier to fulfilling their language needs is finding staff who can combine foreign language competence with other skills and attributes needed to do the job in question. Case studies make clear that languages are required in addition to, not at the expense of, other skills. But because our survey covers so many languages across so many different fields, no clear picture emerges of the most desirable combinations of sectoral skills and languages. It is possible that a wider scale quantitative survey might be able to shed further light on this, although this would be far from straightforward. However, applied language skills – generic business administration and management skills in a foreign language – are clearly valuable cross-sectorally. We can therefore draw two general conclusions: a) that it would be desirable for language students to develop some skills in a

business- or employment-oriented context, and b) that students in a wide range of other disciplines would benefit from a language (also in an applied context) in addition to their main subject. The very frequent use of foreign languages for emailing highlights the need not to overemphasise oral skills at the expense of the written language.

Although respondents see the main issue as finding the right combinations of skills, they do not prioritise further or higher education for policy action to overcome this. Rather they see policy solutions in the teaching of languages to all pupils in primary and secondary schools. The current Government's policy for compulsory language learning in primary schools receives strong endorsement.

The findings from the survey clearly demonstrate that the need to move 'beyond English' is understood and acted on by this sample of employers. Foreign language skills are more than merely 'nice to have': the strongest motivation among our respondents for using foreign languages is because 'others do not speak English'. The use of foreign languages is a serious and necessary business function, not simply a courtesy to others, and the value of foreign languages in securing competitive advantage and for relationship-building is understood and prized.

Our survey is based on self-reporting by institutions – clearly other methodologies such as observations of actual practice would provide a closer level of detail on the situations in which languages are used in working environments and which skills come into play. Larger scale surveys would be necessary to provide quantitative information of statistical validity which might take us further towards matching particular languages with particular types of industry or operational function.

Our survey sits between these two extremes and paints a broad picture of the multifaceted contribution of language skills to economic life.

Appendix two

Labour market intelligence for languages

A picture of the jobs market, summer 2012

Report prepared by

Anne Marie Graham
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October 2012

1. Background to the research

The present report provides labour market intelligence (LMI) for the British Academy's 2013 *State of the Nation* report on languages. This report will be updated at regular intervals, and will support the Languages & Quantitative Skills Programme's aim of addressing strategic deficits in language learning by providing up-to-date evidence on the supply and demand for language skills and on their contribution to the UK's economy and society.

Labour market intelligence is carried out by all sectors in order to identify information on skills required by employers, and is used to identify skills needs, skills shortages and areas for training or development. It should be reviewed on a regular basis to evaluate trends in the job market.

Labour market intelligence for language skills explores which languages are requested by employers and which sectors recruit for language skills, and identifies job roles and other related information.

As languages are a skill that can be applied in a wide range of sectors, it has been difficult to quantify the labour market. Most labour market intelligence prior to 2011 was qualitative, relying on a range of European and regional data sources supplemented by employer interviews. However, in 2010–11, the University Council of Modern Languages (UCML) funded a piece of labour market intelligence for graduates with language skills that tested a new, quantitative method of measuring the job market. This method consisted of reviewing online job sites posting vacancies with language skills. While the review was not comprehensive, it was valuable as a sampling of the job market during a particular period and provided useful evidence for higher education and skills planning.

The present labour market intelligence has a broader scope than the 2011 research, in that it reviews the whole market for language skills, not just for graduates. It also explores languages as an added value skill or as a skill beneficial to a job application, which was not measured in the previous research.

2. Duration of the research

The research took place between 8 June and 16 September 2012. The 14 week research period included the summer holiday period, and the period covering the London 2012 Olympic and Paralympic Games.

In conjunction with the general economic downturn in the United Kingdom, the timing of the survey may have resulted in a lower than average number of vacancies advertised. Therefore, these numbers may under-represent the overall labour market for languages. Ideally, labour market intelligence should be ongoing, or at least repeated at regular intervals, in order to build up a reliable picture of trends.

3. Scope of the research

The research included all foreign languages, but excluded sign languages. Welsh, Irish and Gaelic were included only where they were specified as a second language competence in an advertisement.

Voluntary roles, advertisements which did not specify a job role (e.g. recruitment agencies seeking individuals with language skills but not for a specific job role) and vacancies posted by an individual (e.g. personal language tuition) were excluded from the research.

The research did not aim to collect information relating to salaries.

4. Methodology

The present research was carried out by Anne Marie Graham, of Arqueros Consulting Ltd, who has previously carried out labour market intelligence in the field of languages and intercultural skills on behalf of CILT, the National Centre for Languages, Skills CfA and University Council of Modern Languages.

The objectives of the research were as follows:

- to outline the current demand for languages and intercultural skills in the labour market by collecting information on the total number of jobs with languages advertised on key recruitment websites
- to analyse jobs by language, location, level of language required, sector of employment and job role.

Where possible, the research was to use methodology similar to the 2011 labour market intelligence conducted by UCML, in order to provide an element of longitudinal comparability.

First, the researcher carried out a review of online job sites in order to identify those best placed to provide a quantitative sample of the labour market for languages. There are many online job sites, ranging from international and national websites to smaller recruitment agencies or corporate recruitment sites. In order to extract a representative sample of the labour market in the limited timescale available, selection criteria were established before beginning the research.

All sites were to be general job sites, with no specialism in any particular area of recruitment. To be included, a site needed a search engine capable of searching for specific words defined as search criteria by the researcher, providing an accurate return. For example, a search for 'French, language' must return listings that include either word, rather than listings that include both words. The search function on selected sites allowed the researcher to define job alerts according to general terminology e.g. 'language', and specific languages e.g. 'French', 'Spanish', 'Mandarin' etc.

The researcher defined a time period for the available listings. For the purpose of this research, daily alerts were set up and these alerts returned vacancies posted within the previous 24 hours.

Due to changes in scope, as well as amendments to the search and job alert functions used by the websites surveyed in the 2011 research, the present research was unable to use the same job sites as in 2011.

Four sites were initially selected for the research on the basis that their search functions met the requisite criteria:

- **Telegraph jobs** – used in the 2011 research
- **Guardian jobs** – a major recruitment site with a high proportion of UK traffic

- **Totaljobs** – a similar model to Indeed.co.uk, used in 2011 research
- **Simplyhired** – a similar model to Indeed.co.uk, used in 2011 research.

Telegraph jobs and *Guardian jobs* are newspaper websites with a significant amount of advertisement traffic and are widely used by UK jobseekers. They are representative job search tools and were selected on this basis.

TotalJobs and *Simplyhired* are aggregator websites, which collate a wide variety of advertisements for vacancies posted by direct employers, numerous leading recruitment companies and free sites. While the information obtained may not be a comprehensive reflection of the job market, the sites are representative of the tools regularly used by jobseekers and are therefore indicative of recruitment trends.

Unfortunately, one site, *TotalJobs*, had to be discounted after one week due to the search criteria not providing the correct return on advertisements.

Simplyhired, however, includes advertisements from other aggregator sites, including

- *Totaljobs* – used in the 2011 research
- Reed.co.uk
- Xpatjobs
- Jobs.ac.uk
- Gumtree

Simplyhired also includes job advertisements from numerous recruitment agencies around the UK. Some of these agencies specialise in multilingual recruitment.

- Languagematters
- Merrow
- EuroLondon
- Kerr Multilingual Recruitment
- Boyce Recruitment

It also includes advertisements from other agencies who post vacancies from other sectors with a language requirement.

On the basis of the wide range of aggregated sites provided by *Simplyhired*, the researcher deemed the three websites to be a sufficiently representative sample of the labour market.

Alerts were set up so that the researcher received daily emails about new vacancies that were posted under the search terms. A database of vacancies was maintained and job vacancies were added on a regular basis. The database was interrogated regularly for duplicate vacancies (e.g. added by more than one recruitment agency) and any duplicates were removed from the database so as to not inflate the final numbers.

Listings were categorised under the following headings:

- Job role (and its type, e.g. admin, management, if specified)
- Sector (if specified)
- Languages required (if specified)
- Level of language required (if specified)

- Location of job role (English government regions, parts of the UK, Europe, Rest of the world)

Some notes and caveats should be taken into account when reviewing the findings. Sectors were defined by the listings themselves. Where a vacancy fell into multiple sectors, the researcher attempted to assign it to the most appropriate and representative category, aligned to the sector rather than the role.

It should be noted that some vacancies requested more than one language or had roles in more than one language. Where vacancies required more than one language, each individual language was categorised under the Language tab in order to accurately reflect demand for individual languages. Therefore the total number of language vacancies is greater than the total number of individual vacancies.

Vacancies in more than one location e.g. at different branches or sites of the same company are counted once, to accurately reflect numerical demand. However, the geographical locations are counted individually to accurately reflect geographical demand. Therefore the total number of vacancies per region is greater than the number of individual vacancies.

Due to the high number of duplicate vacancies posted on online sites, the researcher was unable to accurately calculate the exact percentage of jobs that requested a language skill in comparison to the job market as a whole.

It should be acknowledged that other vacancies may be advertised on job sites not covered by our research. The present research does not account for vacancies advertised internally.

5. Findings of the research

Over the course of the research period, 1,058 unique job vacancies were posted. This is less than the figure obtained in the 2011 research, 2,015, but the present research has included enhanced editing for duplicate vacancies and re-advertisements. It was also conducted over a different time period during the calendar year. Therefore it cannot be compared directly.

5.1 Job roles
Vacancies that required language skills were extremely wide-ranging, and it is therefore difficult to categorise them efficiently. This is partly due to different companies having their own nomenclature and job titles, but partly due to the diverse sector spread (described in section 5.2). There is no real pattern to job titles, except perhaps in education, and similar roles may be called by slightly different names across sectors, e.g. customer service adviser, customer service agent, etc.

However, it is possible to make some grouping under terminology. For instance, about 12% of vacancies feature either 'customer service' or 'customer support' in the role title, e.g. customer service advisor. Similarly, 12% of roles feature 'sales' in the title, e.g. sales executive. Approximately 3% of roles feature marketing or PR in the title. Business development features in the title of 2% of roles, as does the term 'client'.

Nearly 5% of roles feature translator, translation (e.g. project manager), interpreter or interpreting in the title.

Other commonly advertised roles include 'teacher' or 'tutor' with 3% of roles, or roles in 'accounts' nearly 2% of vacancies.

Other words that recur in job titles include 'international' and 'European', which both feature in just over 1% of job roles. Interestingly, the term 'export' features in less than 1% of job roles.

Figure 1: Commonly used terms in job roles/job titles
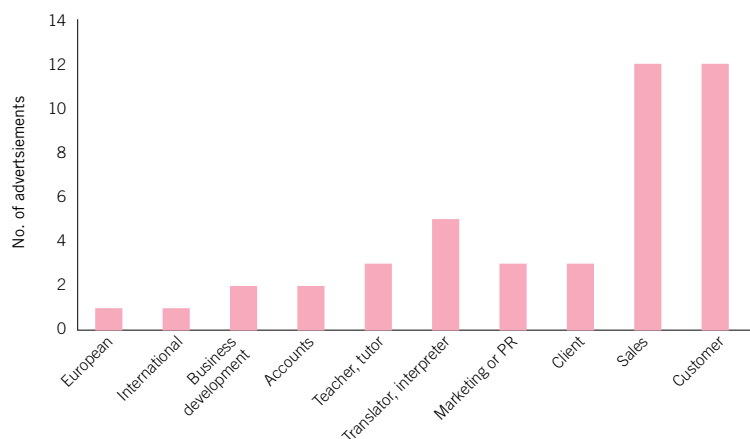
5.2 Sectors advertising roles requiring language skills

The present research categorised jobs, wherever possible, in line with the sectors recognised in the National Employer Skills Survey.[339] It also defined vacancies according to recognised pan sector areas, such as marketing, sales, customer service and human resources. Therefore it does not directly correlate to the 2011 research in terms of sectors. However, this was a deliberate decision by the researcher as it is intended to ensure the data corresponds more closely to other skills surveys, and makes the data more meaningful to individual sectors. It could therefore be included in sectoral LMI where relevant. It is recommended that any future labour market intelligence retain the same sector categories, where possible.

In addition to the categories defined in the National Employers Skills survey (NESS), new or additional sectors were defined by the listings themselves. For example, the research also includes linguist roles, which are not referenced in the NESS. It also includes a new sector to emerge requiring language skills, namely business services. Business services were not evident in the 2011 LMI but include outsourcing, consulting, subscription services, events management and process management roles. As several advertisements stated business services as the relevant sector, this was added to the list of categories.

Larger categories were broken down into subsectors where significant numbers of vacancies occurred in a particular subsector, e.g. media & publishing in the creative industries.

Using these categorisations, 35 different sectors were represented within the advertisements during the research period.[340]

The sector with most vacancies was finance,[341] with nearly 13%, or 136 roles, followed by IT[342] with just over 11%, or 121 vacancies. Within the IT sector, the games industry provides a strong market for language skills, with varied roles in translation, testing and localisation project management.

The education sector, incorporating schools and universities, posted just over 7% or 78 vacancies in the research period. Communication vacancies were also common, with nearly 6% of roles in marketing & PR, and 5% in the media.[343] Digital and social media vacancies accounted for 42% of the media sector's vacancies, mirroring a general trend in media vacancies overall.[344]

Figure 2: Top 5 sectors recruiting for language skills
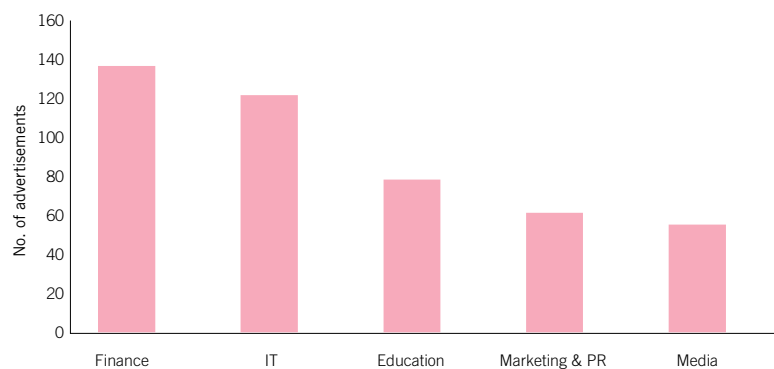
Language service roles – including interpreting, translation and other related roles, such as translation project management – were not as widespread as might be assumed, with only 3% of vacancies posted in the language service industry. However, there were roles advertised for specialist linguists in other sectors, such as the games industry or the legal sector, raising the total of linguist roles overall (cf. section 5.1).

Vacancies specifying language skills are not confined to business. The public sector also advertised vacancies during the research period. Just over 1% of roles were in government,[345] of which two were based overseas. Less than 1% of jobs were in the legal sector, although there were legal roles requiring language skills (such as legal translators or paralegals, which accounted for another 1% of vacancies) advertised in other sectors. However, manufacturing and engineering are sectors which maintain an interest in language skills, with 2% and 2.5% of the market respectively. Travel & tourism roles also requested languages with 2.5% of vacancies. The healthcare and pharmaceutical sector had a similar proportion of vacancies, predominantly in sales or regulatory roles.

341 Finance includes banking, accountancy, insurance, financial services, investments, credit control and purchase ledger roles.
342 IT includes the games industry, hardware and software, technology and telecommunications.
343 Media includes journalism, radio, TV, digital media and B2B roles.
344 As a comparison, On the Guardian jobs website 28/9/12, out of 1598 media jobs, 649 were digital media (approx. 40%).
345 Government includes policy, military, security and regulatory roles.

Figure 3: Other sectors recruiting for language skills
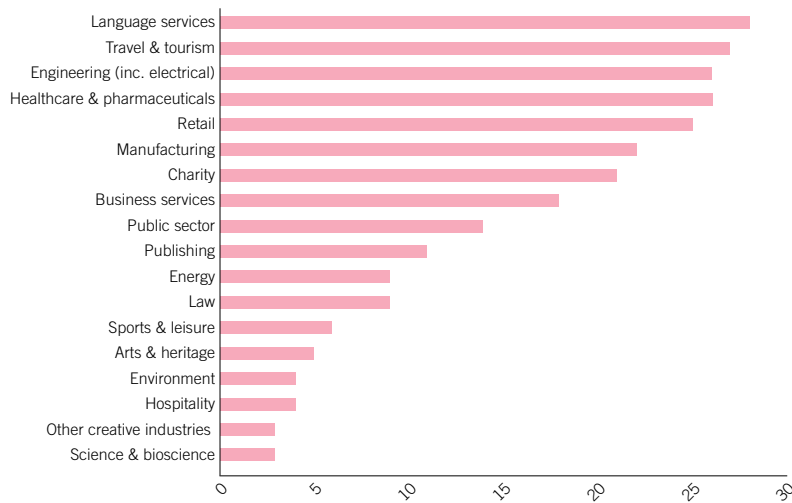
Sectors with less than 1% of vacancies include energy, sports & leisure, environmental industries, other creative industries,[346] construction, property services, advertising, food manufacturing, HR and logistics.

The number of vacancies requesting language skills in a particular sector may reflect the general labour market. For example, the IT sector is recruiting strongly overall,[347] so it is logical that it will have a high proportion of the vacancies for languages as well. Sectors with low numbers may also be indicative of a recruitment freeze in that sector. This reiterates the importance of regular labour market intelligence to track employment trends.

A significant number of advertisements (12%) did not specify any job sector. Roles which did not specify a sector tended to be those posted by recruitment agencies, which have a policy of withholding client information in job advertisements.

5.3 Languages specified in advertisements

In total, 47 different languages were specifically requested in job advertisements. The languages most requested by employers were German (345 vacancies) and French (318 vacancies), meaning that 62% of vacancies requested skills to some extent in these languages. 158 (approx. 15%) vacancies requested skills in both French and German.

346 Not including media & publishing.
347 Barclays Job Creation Survey, 2012.

Figure 4: Languages specified in job advertisements
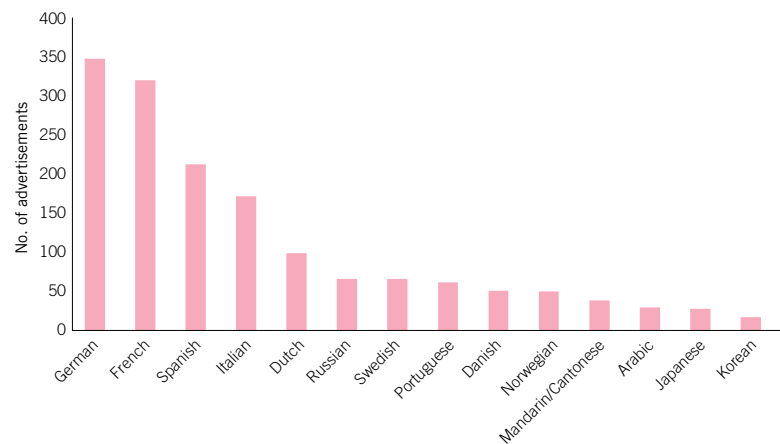
Other frequently requested languages include, in order of demand, Spanish (211, or 18%), Italian (170, 14%), Dutch (98, or 9%), Russian (65, or 6%), Portuguese (61, or nearly 6%, of which 4 specified Brazilian Portuguese) and Polish (36, or 3%). Mandarin or Cantonese (38, or nearly 4%)[348] and Arabic (29 vacancies, or nearly 3%) scored relatively low in comparison to European languages, as did Japanese and Korean (with 27 and 17 vacancies respectively). Indian languages specified in advertisements included Hindi, Gujarati, Bengali, Urdu and Panjabi but these had less than 1% of requests, as did the community languages of Somali and Farsi. Other EU languages, such as Bulgarian and Turkish or Asian languages such as Malay were requested in less than 1% of vacancies.

Scandinavian languages were frequently specified in job advertisements. Individually, Swedish is the most requested, (in 65, or 5.3% of vacancies) and, together with Russian, is the 6th most requested language overall. It is followed by Danish (with 50, or 5% of vacancies), Norwegian (49, or approx. 5% of vacancies) and Finnish (29, or 3% of vacancies). In addition to requests for individual languages, 19 vacancies (<2%) asked for a non-specified Scandinavian or Nordic language capability.

Six per cent (68) of advertisements asked for candidates with skills in two or more languages. Many advertisements gave a list of languages that would be beneficial in the role, with 312 (29%) specifying two or more languages that would be recognised in the recruitment process.

European languages
Interestingly, 5% of vacancies (53) specified that the candidate should have a European language or an official language of the EU, but did not specify which language. In addition, four vacancies specified that the candidate should have Eastern European language skills, but did not specify which language.

European languages are overwhelmingly the most requested by employers in advertisements. Over 96% of vacancies requested skills in a European language, specified or unspecified. This may be explained by the fact that so many of the advertised roles are customer or client-facing. As UK trade statistics[349] demonstrate, other EU nations are our main non-English speaking markets and therefore are a major customer base for UK businesses. The relative lack of jobs requiring Mandarin or Cantonese could be due to the fact

348 Where vacancy specifies 'Cantonese or Mandarin', this has only been counted once.
349 Graham, Labour Market Intelligence: Languages & Intercultural Working. Skills CfA, February 2012, p.46.

that, as trade statistics show, as yet the UK does not export as many products and services to speakers of these languages.

Ninety-one, or 8.6% of the jobs advertised during the period of the research specified that any European language would be 'beneficial', 'ideal', 'an advantage', 'preferred' or 'desirable'.

5.4 Language trends per sector

As we have already reported, the finance sector advertised the most vacancies during the research period. European languages were dominant within this sector, with EU languages making up over 90% of requests in finance, with Russian, Turkish and Brazilian Portuguese making up the remainder. German, French, Spanish or Italian were required in 46% of financial sector vacancies.

In the IT sector, European languages were also overwhelming popular, again with over 90% of vacancies specifying EU languages, with Japanese, Russian and Hebrew making up the remainder.

The games industry within the IT sector is recruiting predominantly for Western European or Scandinavian languages, with Polish the only exception (in just one request for a games translator).

In education, the majority of these roles were for secondary school teachers, working from Key Stage 3 to Key Stage 5, with French, German and Spanish the most requested languages in education.

French and German were the most requested languages by the engineering sector, which only advertised for European language skills.

Communication, Sales, Marketing and customer service roles spanned a diverse range of languages, which we can assume reflects the customer base of the companies posting the vacancies.

5.5 Level of language requested

Around half of the vacancies (516 or 48%) that did specify a level requested fluency in a language. Just over 4% required native level competence in a language. Less than 1% of employers were seeking bilingualism with English. Most vacancies also specified full fluency in English, regardless of the foreign language requested, reminding us that English language competence is still a vital skill.

However, a large proportion of vacancies (31%) did not specify a level of language.

Figure 5: Level of language requested by employer

Other competences requested included 'business fluency', 'oral fluency', 'conversant', 'advanced', 'basic', 'graduate level' 'good level of' 'written and spoken', 'outstanding', 'superb' and 'excellent'. These competences are much more subjective and difficult to analyse in terms of the research.
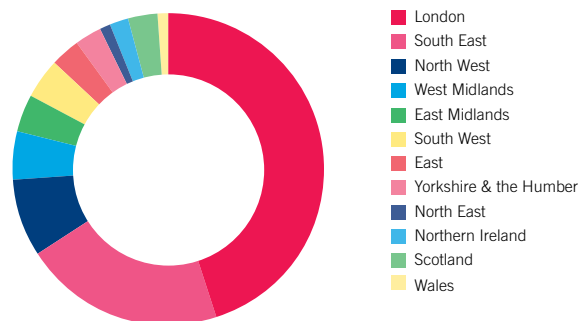
As we can see, employers use a wide range of terminology to articulate the level of language they are looking for. This makes it difficult to draw robust conclusions, and demonstrates the importance of using frameworks such as the Common European Framework for Languages or the UK Occupational Language Standards as a common vocabulary to specify language skills.

5.6 Location of vacancies
Within the UK, most (63%) of vacancies were located in London or the South East. Other pockets were located in the North West (approx. 8%), West Midlands (approx. 5%) or other highly populated areas, such as the East Midlands (4%).

Yorkshire & the Humber and the North East had the lowest number of vacancies in England.

Figure 6: UK Vacancies

- London
- South East
- North West
- West Midlands
- East Midlands
- South West
- East
- Yorkshire & the Humber
- North East
- Northern Ireland
- Scotland
- Wales

Across the UK, 2% of vacancies were in Northern Ireland, 3% in Scotland and 1% in Wales. Of all vacancies in Wales, 64% requested Welsh as the second language competence.

It is unsurprising that the majority of vacancies are found in the highly populated areas of London and the South East, as well as in other densely populated areas such as the North West or West Midlands. The ONS regional trends report also notes that the North West and West Midlands have started to see a fall in unemployment sooner than other regions,[350] which may explain the increase in vacancies compared to other areas of the UK (see section 5.9 for full details). The predominance of vacancies in London and the South East of England contributes significantly to the large proportion of vacancies in England compared to the devolved UK nations.

A small number of vacancies (<0.5%) did not specify a location or were home-based.

While UK vacancies naturally dominate job advertisements on UK websites, 36, or 3% of vacancies advertised were in other European countries. Of these, 8 (or 22%) were in a country where the language requested was widely used. Other European vacancies were located throughout Europe but had a mix

350 Office of National Statistics. Regional Trends 43. July 2011.

of language requirements. These tended to be customer-facing roles, where staff may be dealing with customers in a range of countries other than where the job is based. Approximately 11, or 1% of vacancies were located in other destinations, including Africa, USA, Central America, the Middle East and Asia.

Figure 7: Vacancies per location worldwide
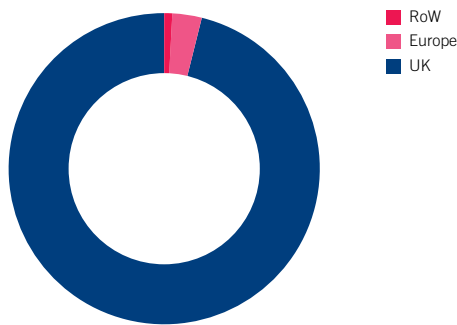
During the analysis of vacancies, the researcher also noted some overseas vacancies that specified that language skills were not required. This may be worth exploring in more detail in future labour market reviews, to include as a percentage of the job market.

5.7 Languages as added value
Unlike previous labour market research, the present research captured job advertisements that did not request a specific language but that stated that a second language or language skills would be beneficial or an advantage to candidates applying for the role.

Of the total number of vacancies recorded, 9% (96) noted that a second language would be beneficial on applications, but did not specify which language. This indicates that employers value the skill of a second language, irrespective of which language it is.

As previously stated, 91 or 8.6% of the jobs captured during the period of the research specified that any European language would be 'beneficial', 'an advantage', 'preferred' or 'desirable'.

Other advertisements quoted:

"…applicants with European languages will be favoured…"

"…please let us know if you can speak another language…"

"…language skills advantageous…"

"…candidates with language skills will be preferred…"

This is compelling evidence that language skills are beneficial when applying for jobs, even when they are not directly linked to the job role itself. This is a

fertile area for future research, which should be followed up in subsequent labour market intelligence or similar reviews.

5.8 Trends

While a direct comparison cannot be made in every category, due to the expanded scope of the present research, we can still note some general trends in comparison to the 2011 labour market intelligence.

5.8.1 Languages requested

In the present survey, German is the language most requested by employers, closely followed by French. This is a direct switch from the 2011 research, where French was slightly more popular than German. Requests for these languages are the most numerous by far with over 62% of vacancies requesting one or both of these languages, which significantly exceeds the proportion identified in the 2011 LMI, where approximately 46% of jobs required one or both of these languages. As 2012 research by Skills CfA notes, the popularity of European languages with employers is understandable when we consider that the European Single Market is a significant trading bloc for the UK, with Germany, the Netherlands and France in our top five export markets. The Netherlands and Germany are also the largest growth markets for UK food and drink products, and Scotland in particular has seen a significant increase in exports to the Netherlands in recent years. This may explain why Dutch was the fifth most requested language by employers in both 2011 and 2012.

Spanish and Italian remain firmly in 3rd and 4th position, with demand holding strong for these major European languages. In the 2012 research, Spanish was also requested for roles based in Central America, and for roles dealing with a Latin American customer base.

Table 1: Frequency of requests for a specific language

Language	2012 ranking	2011 ranking
German	1	2
French	2	1
Spanish	3	3
Italian	4	4
Dutch	5	5
Swedish	6=	6
Russian	6=	7
Portuguese	8	12
Danish	9	10
Norwegian	10	9
Chinese	11	8
Arabic	12	11

The order of frequency has changed little from 2011, with Russian rising slightly in popularity to join Swedish in joint 6th place. Portuguese, Danish and Norwegian have moved ahead of Mandarin or Cantonese in this year's review, increasing the dominance of European languages.

In fact, the top 15 languages have remained the same since 2011, with no new languages entering the frame. This correlates with the fact that there has been little recent change in the primary markets for UK trade. However, we have noted Brazilian Portuguese specified in some advertisements specifying Portuguese and this should be tracked further in future reviews of the labour market.

5.8.2 Types of roles

There is more detail on types of roles in the present research, with a greater division between role and sector than in the 2011 research. For example, sales roles have been aligned more closely to the sector in which they are advertised e.g. retail, IT, and therefore do not form their own sector. For that reason, we are unable to directly compare the two sets of findings.

Nonetheless, in the present research, customer-facing roles are those that most frequently specify a language skill. Whether it is writing materials and online content in the language of a market, or dealing with customer enquiries or sales leads in a foreign language, roles which require interaction with customers or suppliers in another market are the most likely to require a language skill.

Languages are requested for both sales and customer support roles. This corresponds closely to the 2011 research, where sales & trading roles were designated as a specific sector, and dominated the advertisements posted with 36% of vacancies. In the 2011 LMI, customer service roles were split across Administrative and IT sectors – making it difficult to make an accurate calculation – but may have potentially formed up to 20% of the labour market.

5.8.3 Sectors

The present research has categorised vacancies, where possible, in line with the sectors and pan sector areas recognised in the National Employer Skills Survey.[351] Therefore it does not directly correlate to the 2011 research in terms of sectors. However it is intended that this will make the data more meaningful to individual sectors and enable it to be included in LMI for other sectors where relevant. For instance, the finance sector may want to look at data on foreign language skills when it conducts its regular LMI review. For this reason, it is advisable to retain the present categories, as far as possible, in any future labour market intelligence.

Nevertheless, we can still draw some comparisons. In the 2011 research, sales & trading roles and customer service roles were most in demand. The present research also has a significant number of sales, customer service, marketing and client-facing roles, in a wide variety of sectors.

Sales and trading roles were the most popular by a considerable margin in 2011. While sales and trading roles do not appear as widespread in the present research, when recruitment, business development and other sales related roles are included in the pan sector area, it still forms one of the largest groups of vacancies. This confirms that roles which require the individual to interact with customers are still an important element of the labour market for languages.

Marketing, PR and advertising roles hold a similar proportion of the labour market in the present research as they did in the 2011 LMI, with nearly 6% and 5% of the market respectively.

Finance roles formed a significant proportion of the job market for language skills in the 2011 research, with the second highest number of vacancies. In the present research, they are the predominant group, which indicates both the continued demand for language skills in the sector and, potentially, an upturn in recruitment figures for this sector.

The IT sector continues to request language skills for a range of job roles in the present sample, in a consistent proportion to the 2011 findings, with 11% and 12% of the labour market respectively.

5.8.4 Number of roles

While the number of roles reported is less than last year, this could be attributed to several factors. The researcher noted a considerable fall in the number of job advertisements posted during the London 2012 Olympic Games and throughout the whole of August as a whole. This could be due to an intensified holiday period, as people took leave either to attend or avoid the impact of the Olympic Games. As the research period also incorporated the general summer holiday period, this could have a further impact on the numbers of vacancies advertised overall. It will be interesting to review National Statistics for the period covering the Olympics, which will be released at the end of 2012, to review any overall trends.

The lower figure could also have been due to the change in sites used in the research but this is unlikely due to the fact that the aggregator site used included advertisements from many other sites, some of which featured in the previous research.

5.9 Location of vacancies

5.9.1 England

As in 2011, London and the South East post the overwhelming majority of vacancies requesting language skills. However, the present research has seen the North West as the region with third largest demand, unlike 2011 where it was fifth behind the West Midlands and the East. The West Midlands remains in fourth place overall, as per the 2011 research, but the East Midlands and the South West has overtaken the East of England in terms of demand for language skills.

Table 2: English regions' demand for language skills (highest to lowest)

	2011	2012
1	London	London
2	South East	South East
3	East	North West
4	West Midlands	West Midlands
5	North West	East Midlands
6	South West	South West
7	East Midlands	East
8	North East	Yorkshire & the Humber
9	Yorkshire & the Humber	North East

Changes in demand such as these reinforce the need for regular labour market intelligence in order to closely monitor trends and provide accurate information on regional and national demand.

5.9.2 UK

As in 2011, England has the overwhelming majority of vacancies followed by Scotland, Northern Ireland and Wales. This order of demand corresponds directly to the order of demand in 2011.

It is unsurprising that the parts of the UK with the largest population size would have the largest number of vacancies. However, it would be interesting to

explore in future reviews, if additional funding were available, whether there is any specific sector breakdown in the devolved nations. This has not been done in detail in previous LMI, and would be interesting to explore.

5.9.3 Worldwide
There was no calculation of the distribution of worldwide vacancies in the 2011 research with which to make a comparison. However, it is natural that UK job sites will primarily advertise UK vacancies. It would be useful to track in future labour market reviews the number of job vacancies overseas that are advertised without the need for foreign language skills, as a comparison.

Conclusion

As the research shows, language skills continue to be requested by employers in a range of sectors for a wide variety of job roles. These requests are for languages as an essential skill, and also as a preferred additional competence that would add value to the applicant's CV. This new evidence – that languages are a skill that adds value to an individual's profile – is a useful piece of evidence for higher education and careers education professionals looking for information on the benefits of studying a language after the age of 14. As information on employability becomes a critical tool for educational institutions in this new, student-led environment, up-to-date evidence from employers on the value of languages as a skill becomes ever more important, reinforcing the need for languages-specific labour market intelligence.

The present research demonstrates that there is still a strong demand for European languages, particularly French and German, on the labour market. Spanish, Italian and Dutch also remain strongly in favour with employers in a range of sectors. Other European languages, such as those from Scandinavia, and languages of major trading partners, such as Russian remain strong. Demand for Portuguese seems to have grown since the last labour market intelligence, and it would be interesting to carry out a similar review in a year's time to track any further trends in demand for this and other languages.

Languages continue to be used in customer or clien-facing roles, leading to a wide variety of languages specified in job advertisements. However, the strength of the EU trading, and possibly cultural, relationships leads to predominance of European languages in the job market, with some evidence of interest in the languages of the BRIC nations, as Russian holds firm in the top 10 and Portuguese moves into the top 10 most requested languages. The languages of future EU accession states, such as Turkish, are also specified more regularly than in previous LMI, although still in less than 1% of vacancies. It will be interesting to note if future labour market intelligence confirms the CBI's predictions that these languages will increase in demand.

From a careers information perspective, the research provides useful data on which sectors are recruiting. It provides evidence of a range of recognisable roles available in finance, media, IT and education, enabling careers information to link languages to tangible job roles in areas such as banking, journalism and the games industry. This can translate into useful employability data and provide careers information for those learning or considering learning a language.

The sectors used in this research are aligned more closely to those used in wider scale research, such as the National Employer Skills Survey, as it is intended that this will make the data more meaningful to individual sectors and

enable it to be included in LMI for other sectors where relevant. For instance, the finance sector may want to look at data on foreign language skills when it conducts its regular LMI review. For this reason, it is advisable to retain the present categories, as far as possible, in any future labour market intelligence.

The present research shows that it is important to review natural demand, such as job advertisements, in addition to employer surveys, where employers are prompted to give answers under certain headings. In this way, labour market intelligence can provide useful and credible information on employment prospects that can be used in the new student-led system.

The research period was relatively short and incorporated the summer holiday period, therefore may not provide the most representative sample of the labour market. Where possible, labour market intelligence should be conducted over a longer period of time, to counteract short term dips in the market due to holiday periods, such as Christmas or summer.

It should preferably be conducted at the same time each year, to provide comparable evidence and ascertain employment trends.

Despite the above caveats, the present research provides an interesting and thought-provoking snapshot of the labour market for language skills across a specific period of time.

Appendix three

Commentary on sources of data on numbers of language students in UK higher education

1. Data collected by the Higher Education Statistics Agency (HESA)

Reporting data to HESA is the responsibility of individual institutions. They may report up to three subjects, although not all do so. Data from a small number of institutions are excluded. Some institutions will report a student studying a language for 10% of their time, but others may not. Figures therefore include some but not all students of other disciplines undertaking some sort of language study. The following caveats apply to HESA data on languages:

- The category (R9) 'Others in European languages, literature & related subjects' is overused as some institutions report all their language students in this category. This means that a student who is studying French and German will be reported as having two language learning experiences if they are reported for French and German, but just one language learning experience if they are reported under 'Others' (R9).
- Some languages do not have their own category. For example, Arabic and Persian and possibly other languages too are categorised as 'Middle Eastern Studies'.
- Linked to this, some students undertaking Area studies (e.g. Asian Studies, American Studies. Middle Eastern Studies etc.) and some categories of Combined Studies may not be studying a language at all.
- Figures may not include Continuing Education students. The category 'Other undergraduate' possibly contains continuing education students, but may include full-time undergraduates studying languages as a small part of their degree.
- Non-accredited courses run by universities are not reported.

The HESA figures presented in this report come from two separate sources:

a. the 'full time equivalent' statistics published by HEFCE, based on HESA data
b. 'headcount' statistics obtained directly from HESA.

The HEFCE analysis cannot be used to show the number of individuals learning languages, because it rolls up single honours students with those undertaking combined degrees and or studying a languages for a smaller proportion of their time, as 'full time equivalents'.

Although on the one hand the numbers it shows are smaller than the actual number of individuals studying a language, on the other, the analysis over-

estimates the proportion of linguists, who normally follow a 4 year course, in relation to first degree students in other disciplines who complete their course in 3 years.

The HEFCE analysis has been used in Figures 36, 38, 39, 80 and 87 to show trends over time, the profile of those studying languages, and comparisons between proportions of languages students and those studying other disciplines.

The 'headcount' statistics obtained directly from HESA and used in Figures 37, 56, 57, and 58 of this report, show the number of individual language learning experiences – a much more useful figure for considering the extent of supply. However, the data are still unsatisfactory in a number of ways:

- They do not distinguish between those studying single honours languages (i.e. for 100% of their time) and those taking a language for 75%, 50%, 33% or 10% of their time.
- They are still not an accurate reflection of the actual number of individuals who are studying languages, as those studying two languages will be counted twice and those studying three languages three times. The total number of 'language learning experiences' exceeds the number of actual students studying languages. However, this can be derived by subtracting from the total the number of students studying two or more languages. By this calculation the total number of those studying languages (including both postgraduates and undergraduates) drops from 53,711 individual learning experiences (in 2010/11) to 43,555 individuals.

2. Universities and Colleges Admissions Service (UCAS)

The report has also used data from the UK's Universities and Colleges Admissions Service (UCAS – figures 40 and 41). This can provide data on which courses are in the highest demand (by looking at application to accept ratios), details about the socio-economic profile of students, school grades etc.

However, UCAS data is not very reliable for tracking trends in individual languages. The subject data presented by UCAS is based upon the applicant's 'primary choice' as judged by UCAS staff and there is very little allowance for joint and combined honours combinations to be recorded. Where they are reported, it will be where the applicant has expressed no clear preference for a subject and there is therefore a preponderance of applications in the category 'Combinations of Languages with other subjects' without any way of knowing what these combinations are.

For individual languages 'trends' are extremely volatile, probably not because demand is volatile, but because classification practices vary year on year. This is especially the case of 'less widely taught languages'.

As each individual is only counted once, UCAS data provides a good overview of the total numbers who might be studying for a language degree in higher education. However, it cannot pick up the numbers of students who enrol on language courses in Institution-Wide Language programmes or those who change to or from languages on arrival.

3. Data from University Language Centres

Although some language study undertaken in University Language Centres is recorded in the HESA data, an unquantified proportion is not. Survey research carried out by the Association of University Language Centres has attempted to plug this gap. In 2007/8, the last year in which the survey was conducted, this identified a total of around 32,000 higher education students on unaccredited language courses outside their main studies (results based on 56 institutions surveyed in the UK).

In 2010 and 2011, surveys were conducted of students from other disciplines taking language courses. Once again, the information provided refers to a group of students which overlap to some extent with the HESA records, but the survey also captures additional information about learners which fall outside the scope of HESA reporting. The information provided about the profile and motivations of learners is valuable, but not necessarily representative because of sample bias.

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In 2011 the British Academy launched a four year programme to support Languages in the humanities and social sciences. The Academy's programme is committed to a range of research support, partnerships and other activities, seeking to demonstrate the value and importance of languages for the health and wellbeing of education, research, individuals and society at large. The British Academy for the humanities and social sciences has been supporting the best in UK and international academic research for over a century. Established by Royal Charter in 1902, the Academy is a Fellowship of over 900 leading UK scholars and social scientists which works to further our understanding of the past, present and future through research, policy reports, publications and public events.

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