A new landscape for
languages

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Foreword

In May 2000 the Nuffield Languages Inquiry drew attention to the far-reaching changes taking place in languages provision in Higher Education in the UK. As this report shows, the trends identified by the Inquiry have since accelerated. That is important in itself, but the consequences extend well beyond Higher Education. The changes in provision in universities will affect the decisions being made by young people in schools and colleges. Conversely, changes at the 14-19 level will affect the courses and training offered by the universities. Both will have profound long term effects, not least on the future supply of language teachers.

One of the key themes of the Nuffield Inquiry was its exploration of the interdependence of developments in the various sectors of education and the consequences for the world beyond education. It was in this context that the Nuffield Languages Steering Group commissioned Professor Michael Kelly to investigate the changes taking place in Higher Education and to explore their implications for both the HE sector and for schools and colleges.

Professor Kelly's report describes a changing landscape for languages. On the one hand, more students are adding language skills to their portfolio, while on the other, fewer students are choosing to specialise in languages. The continuing decline in traditional forms of language education is accompanied by a sharp growth in alternative and less formal kinds of provision. As the report makes clear, this presents both threats and opportunities, all of which must be thoroughly considered and debated. The government has recently launched its strategy for languages in the UK. The success of the strategy will depend on what happens at these crucial stages of education and we hope that the publication of this report will make a timely contribution to the debate.

On behalf of the Steering Group, I would like to thank Professor Kelly and Dr Diana Jones for their work. We also appreciate the involvement of the many people who have in various ways contributed to the writing of this report.

Sir Trevor McDonald OBE

Chairman: the Nuffield Languages Programme

This study is a wake-up call for languages in 16-19 education and higher education. Far-reaching changes have taken place over the past few years, and a new landscape for languages is emerging. Even greater changes are likely in the next five years.

Educators and policy makers need to be more aware of what is happening, and need to address some important issues. They will require a good deal of fresh thinking, and the purpose of this study is to assist in informing and motivating that process.

It examines the overall patterns of change in 16-19 and higher education. It tracks changes in the **extent** of provision, focusing on student demand and the numbers of students studying and taking examinations. It then looks at the **structure** of provision, focusing on changes in the profile and organisation of providers.

It particularly notes the increased demand for languages studied as a supplementary skill, and the parallel decline in the specialist study of languages. A look at other countries confirms that the trends in provision are not unique to the UK, especially in higher education.

It looks ahead to suggest where the changes may lead, and paints a picture of the new landscape that may be created by the year 2007. A 'familiar future' is based on current trends being sustained over the next five years. A 'different future' will be produced if the trends accelerate. In both cases a mixture of positive and negative developments is likely for languages, and there will be greater differentiation in provision between specialist and non-specialist language studies.

The study identifies key issues, and recommends what we need if the most favourable outcomes are to be achieved:

- Clearer rationales are needed for studying languages, in order to inform public opinion and guide curriculum development.

- The growth of more differentiated provision needs to be managed more effectively.

- Increased collaboration is needed between education sectors, and between institutions.

- 'Deschooling' needs to be better understood, where languages are provided on the margins of the curriculum and supplemented by private provision.

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Introduction

A new landscape for languages

Languages in post-16 education are going through far reaching changes. The long-term trends identified in the Nuffield Report nearly three years ago have accelerated. On the one hand, more students than ever are adding language skills to their portfolio, while on the other hand, fewer students are choosing to specialise in languages. So, in England, for example, the new AS level languages have recruited strongly, while numbers taking a language A level continue to fall. And at university, students are crowding into language classes accompanying degrees in other disciplines, and into voluntary language study outside their degree programme, while at the same time language degrees are struggling to recruit, and entire departments are closing. This is not just an English or a UK problem, since the same pattern is being observed in other countries, and the UK increasingly finds itself in a European and global education market.

A new landscape for languages is emerging from these changes. Most of its individual features are already familiar, but its overall contours and implications are not widely understood. This study draws together the changes that have taken place in the numbers of students studying languages, and in the structure of provision available to them. It looks ahead to suggest where those changes will lead, if they are sustained or accelerated. It concludes by identifying a number of key issues on which action needs to be taken. The picture painted here may shock some readers, though they will be familiar with the current trends that lead to the possible futures described. It is offered as a wake-up call for educators and policy makers, and will have served its purpose if it helps to open up the fresh thinking needed to tackle the new challenges.

Public perceptions

An unprecedented amount of public attention has been focused on languages in the UK over the past three years or so. Interest has been fuelled by the Nuffield Report (May 2000), by the European Year of Languages (2001), and by the publication of national language strategies in England and Wales during 2002. However, much of the recent publicity has taken an adverse turn, concentrating on problems and failures. It has tended to highlight the resistance of UK students to language learning, examining 'our loathing of languages',[1] to the extent that one newspaper commented that 'with so much adverse publicity, it is perhaps no surprise that so few young people take modern languages'.[2]

To some extent, the negative publicity may be ascribed to the preference of the media for bad news. But it has been supported, in fact if not in intention, by specialists in languages, concerned to draw attention to particular difficulties they wish to address. It is given credibility by headline statistics that chart the

decline of some forms of language provision, and by human interest stories of disaster. It has been given a particular focus by the government's decision to remove languages from the compulsory core of the national curriculum in England from the age of 14. The growth of other kinds of language provision does not attract comparable attention, since 'good news is no news'.

Individual choice and national policy

The trends in language study have been affected on the one hand by the preferences of students and parents, reflecting attitudes and values in the wider population, and on the other by state policy, such as the introduction of the Curriculum 2000 arrangements in the 16-19 sector in England. As a result, the patterns of language study in post-compulsory education have undergone significant change.

UK education post-16 is led to a large extent by individual student choice rather than by national policy priorities. However, government and public bodies have the role of monitoring, regulating and where necessary intervening in the interests of national policy. The introduction of Curriculum 2000 exemplifies the role of intervention, since the new framework of study has worked to provide space in the sixth-form curriculum for students to choose to develop their language learning. Conversely, the decision to make languages optional between 14 and 16 apparently had the effect of discouraging take-up of languages from the moment it was mooted.

Where are we going with languages?

This study begins by examining the overall patterns of change in the two adjacent sectors of 16-19 education and higher education. It draws together the changes that have taken place in the numbers of students studying languages, and in the structure of provision available to them. It looks first at the extent of provision, focusing on student demand and the numbers of students studying and taking examinations. It then looks at the structure of provision, focusing on changes in the profile and organisation of providers. Some comparative information is provided on the patterns of provision in other countries, notably other English-speaking countries, and our European neighbours. To a very large extent, this confirms that the trends in provision are common to many countries, and not confined to the UK.

Looking at the changes that have taken place over the past five years or so, it is clear that a new landscape for languages is emerging. Most of its individual features are already well-known and reported, but in bringing them together a clearer impression can be gained of the overall contours and implications of this landscape. The study then looks ahead to suggest where those changes may lead. Two possible futures are described. The first is a 'familiar future', based on current trends being sustained over the next five years. The second is a 'different future', which would be produced if the trends were to accelerate. In both cases a mixture of positive and negative developments is likely for languages, and there will be greater differentiation in provision between specialist and non-specialist language studies.

What is to be done?

The study concludes by identifying a number of key issues that have been highlighted by the analysis, and makes some preliminary recommendations on the kinds of action that need to be taken if the most favourable patterns are to be encouraged and the most damaging ones alleviated. The key points are that:

- Clearer rationales are needed for studying languages, in order to inform public opinion and guide curriculum development.

- The growth of more differentiated provision needs to be managed more effectively.

- Increased collaboration is needed between education sectors, and between institutions.

- 'Deschooling' needs to be better understood, where languages are provided on the margins of the curriculum and supplemented by private provision.

This study is intended to act as a wake-up call and a spur to action for educators and policy makers. The future still remains to be shaped, and there are many actions and initiatives that can help to shape it in a positive direction. Those responsible for languages in post-16 education will need to adopt new approaches to languages. Changes in the school sector will have direct impact on higher education, and vice versa, so that cooperation between the two sectors will need to be strengthened. Students of the future will need to know what they can expect and what opportunities will be available to them. Tackling these challenges will require a clear understanding of what is already happening, and a good deal of fresh thinking. The purpose of this study is to assist in informing and motivating that process.

What is changing in extent of provision?

The starting point for understanding change in languages is to examine how many people are studying a language in the two sectors under review. Taken over the last five years or so, this will provide a picture of how the extent of provision has developed. In some cases, the precise numbers of students involved in language study can be derived from published statistics, for example on examination candidates or on university admissions. In other cases, the numbers are less easy to establish and may depend on interpreting snapshot surveys and partial trends. The raw numbers do not tell the full story. Not all people studying a language will take an examination. Not all people who wish to study a language at school or university are in fact able to do so. Issues of resources, available combinations of courses and other constraints mean that there may be significant unmet demand for languages, some of which is satisfied by independent study outside the formal curriculum, where it will probably not appear in published statistics. However, from available information, it is possible to identify the main trends in the extent of provision over recent years.

1.1   16-19 sector

The extent of provision in this sector is mainly measured by the numbers of students entering for public examinations. Numbers completing GCSE and Scottish Standard exams provide a picture of how many students are eligible to pursue studies at the higher level. Entries in AS, A2 and Scottish Highers provide a measure of how many students choose to take up that opportunity. These figures are well known and well documented.

In the 16-19 sector, there has been a growth to the present relatively high number of students taking a language at GCSE/Standard level. There has been an upsurge of demand for supplementary language learning at AS level, but at the same time a relatively low level of conversion to further studies, and a decline in the take up of A (A2) level.

1.1.1 GCSE/Standard

According to QCA figures, 568,000 students entered for GCSE languages in 2001, the highest figure ever and an increase of 4.25% overall for the period 1998-2001. During the same period, there was also a rise in the total school population. The provisional figures for 2002 suggest that total numbers in languages may have dipped to 551,000.

During the same period there has been slightly higher growth across the total range of GCSE subjects (5.08%). There is therefore a relative decrease in market share for languages, which now account for a little under 10% of exam entries at this level.

GCSE Candidates in Modern Languages - 1992-2002

	1992	1993	1994	1995	1996	1997
French	323,535	319,821	328,306	350,027	347,160	335,997
German	101,388	108,401	118,985	129,386	134,286	134,604
Spanish	29,468	32,148	36,335	40,366	42,553	43,468
Other ML*	22,944	25,221	25,969	25,313	26,693	27,733
All ML	**477,335**	**485,591**	**509,595**	**545,092**	**550,692**	**541,802**
All GCSE candidates	5,028,554	4,968,634	5,029,599	5,431,625	5,525,620	5,455,665
All ML as % of all candidates	9.49%	9.77%	10.13%	10.04%	9.97%	9.93%

*   Italian and Russian were separately classified from 1998.

** Figures for 2002 are based on provisional figures from JCGQ which tend to be marginally lower than those published by QCA.

Source: 1992-2001 QCA, 2002 JCGQ

	1998	1999	2000	2001	2002*
French	337,577	342,227	344,305	350,227	338,503
German	134,286	137,011	134,356	136,437	126,220
Italian	5,427	5,541	5,682	5,714	5,586
Russian	1,732	1,677	1,807	1,803	1,618
Spanish	47,406	49,329	51,264	53,709	58,011
Other ML*	18,357	18,846	19,589	20,068	20,938
All ML	**544,785**	**554,631**	**557,003**	**567,958**	**550,876**
All GCSE candidates	5,398,332	5,501,193	5,514,310	5,672,767	5,662,382
All ML as % of all candidates	10.09%	10.08%	10.10%	10.01%	9.73%

French is by far the largest language, regularly accounting for 62% of modern language candidatures, followed by German with nearly a quarter. Spanish has over 10% of candidates and is steadily increasing its share (up from 8.7% in 1998). Urdu, Italian, Bengali and Chinese all attract more than 2,000 applicants. GCSE's are offered in a total of 22 foreign languages, including less widely studied European and Asian languages as well as regional and community languages.[1] GCSE candidatures in the less widely studied languages fell sharply in 1997-9, but have recovered somewhat since then. In the case of regional and community languages, most of the candidates are likely to speak the language at home, and native speakers may also make up a significant proportion of candidates in Italian and Russian.

GCSE Entries for Less Widely Studied Languages 1997-2002

	1997	1998	1999	2000	2001	2002
Urdu	7,222	6,779	6,348	6,723	6,423	6,946
Bengali	2,462	2,281	1,706	1,933	2,247	2,157
Chinese	2,577	2,189	2,133	2,233	2,213	2,634
Panjabi	2,050	1,705	1,562	1,649	1,581	1,430
Gujarati	1,542	1,179	1,243	1,374	1,458	1,319
Arabic	1,457	1,096	1,119	1,307	1,342	1,773
Turkish	852	1,034	853	943	1,029	1,209
Portuguese	535	509	447	585	654	707
Japanese	669	595	561	636	643	779
Modern Greek	815	731	538	652	517	698
Modern Hebrew	520	360	430	391	406	383
Polish	301	307	293	266	301	290
Other*	57	0	128	435	484	613
Total	**21,059**	**18,765**	**17,361**	**19,127**	**19,298**	**20,938**

In Scotland, figures across the six languages offered at Standard Grade dropped by 4.3% in the period 1997-2001, at a time when uptake in all subjects decreased by 1.4%.[2] But the sharp fall in 1997-8 has been followed by a gradual recovery. As in the rest of the UK, steady growth was observed in Spanish. Italian and Urdu also increased steadily though numbers remain small. Significant drops were recorded in French (down 5.2%) and German (down 8.2%).

Scottish Standard Grade 1997 - 2002

SUBJECT	1997	1998	1999	2000	2001	2002
French	40,489	38,356	37,721	38,362	38,736	39,191
German	17,157	16,019	16,424	15,845	15,748	13,995
Italian	691	627	789	852	797	668
Russian	14	9	14	7	10	17
Spanish	2,575	2,587	2,675	2,911	2,846	3,031
Urdu		122	124	153	174	
Total	**60,926**	**57,720**	**57,747**	**58,130**	**58,311**	**56,902**

Source: SQA. Figures for 2002 are provisional

1.1.2 AS levels

The introduction of Curriculum 2000 has produced an upsurge in the numbers of students choosing to study a language in the first year of sixth form. The 'legacy AS' level exam had a relatively limited take up which had fallen steadily to just over 3,000 entries in languages. The numbers taking the new AS levels have jumped to fifteen times that number, reaching 46,000 in 2002.

AS Level candidates in Modern Languages 1991-2002

	1991	1992	1993	1994	1995	1996	1997
French	2,853	3,167	3,175	3,168	2,967	2,774	2,787
German	907	1,237	1,215	1,152	1,194	1,240	1,145
Spanish	324	384	479	482	530	572	688
Other MFL	96	173	209	192	250	182	286
All Modern Languages	**4,180**	**4,961**	**5,078**	**4,994**	**4,941**	**4,768**	**4,906**
All AS-level candidates	51,507	52,973	54,023	54,737	53,723	60,654	67,304
All Modern langauges as % of all candidates	8.12%	9.37%	9.40%	9.12%	9.20%	7.86%	7.29%

* Italian and Russian were separately classified from 1998-2000 by QCA.

** Figures for 2000/01 include Legacy AS figures for French, German and Spanish.

Source: 1998-2000 figures from QCA, 2001-2002 from JCGQ and CILT (Italian and Russian)

	1998	1999	2000	2001**	2002
French	2,340	1,908	1,672	20,568	22,377
German	902	820	784	9,039	9,973
Italian*	209	226	262	820	1,205
Russian*	27	40	25	211	467
Spanish	654	639	664	6,035	7,787
Other MFL	305	255	264	2,411	4,113
Total of above	**4,437**	**3,888**	**3,671**	**39,084**	**45,922**
All AS-candidates	68,044	71,366	76,458	820,292	995,405
Languages listed as % of all candidates	6.52%	5.45%	4.80%	4.76%	4.61%

Compared to the total range of subjects at AS level, languages account for slightly less than 5% of exam entries at this level, broadly comparable to the proportion at A(2) level. And the relative market share is similarly decreasing.

It is difficult to interpret the AS level figures with confidence, since it is a new qualification and patterns have not yet settled. It is difficult therefore to judge how far the increase from 2001 to 2002 reflects the complex arrangements for 'cashing in' the qualification, how many of the candidates were in their second year of sixth form study, and how many also took A2 exams in either year. However, the numbers taking AS level in 2001 slightly exceeded those taking A level in that year, and significantly exceeded them in 2002.

It is difficult to calculate how many students taking AS level languages in the first year of sixth form have continued them in their second year, and it may be as many as 80%. A small number of students may take up an AS language in their second year. Further information is needed on these patterns. But if this conjecture is borne out, it would be reasonable to conclude that the total number of students taking a language post-16 has significantly increased in the last two years.

It remains to seen how far AS levels are satisfying new and previously unmet demands for a one-year language course in the sixth form, though initial figures suggest this is happening. It may also be that they are to some extent replacing A level by catering for students who would previously have done a two-year language course. Viewed positively it might be providing an exit point for students who might otherwise have done poorly at A level.

1.1.3 A(2) level/ Highers

The demand for A level languages has been declining steadily from the high point it reached ten years ago in the enthusiasm for the European Single market. The figures are well-known and widely circulated.

A-level Candidates in Modern Languages 1992-2002

	1992	1993	1994	1995	1996	1997
French	31,261	29,886	28,942	27,563	27,487	25,881
German	11,338	10,857	10,832	10,632	10,726	10,440
Spanish	4,720	4,850	4,740	4,837	5,232	5,606
Total of above	**47,319**	**45,593**	**44,514**	**43,032**	**43,445**	**41,927**
All A-level candidates	731,240	734,081	732,974	730,415	740,470	777,710
Languages listed as % of all candidates	6.47%	6.21%	6.07%	5.89%	5.87%	5.39%

*   Italian and Russian were separately classified from 1998.

**   Figures for 2002 are based on provisional figures from JCGQ which tend to be marginally lower than those published by QCA.

Source: 1992-2001 QCA, 2002 JCGQ and CILT

	1998	1999	2000	2001	2002**
French	23,579	21,333	18,341	18,079	15,615
German	10,228	9,777	8,718	8,575	7,013
Italian*	891	963	920	945	787
Russian*	549	573	581	531	481
Spanish	5,644	5,876	5,702	5,743	5,573
Other ML	3,550	3,259	3,576	2,751	3,582
Total of above	**44,441**	**41,781**	**37,838**	**36,624**	**33,051**
All A-level candidates	790,035	787,732	774,364	770,995	701,380
Languages listed as % of all candidates	5.63%	5.30%	4.89%	4.75%	4.71%

Languages continue to lose their share of the A-level market, with 33,000 candidates, around 4.7% of all A-level entries, in 2002. French remains by far the most popular with half of the language entries. But its total numbers have halved in ten years and have fallen by a third in the last five years. German is the next most popular, with a share of around a fifth of language entries. Its numbers have fallen too, though not quite as sharply as French until a major drop (18%) in the last year. Spanish is catching up with German and has grown by a fifth over ten years. Its numbers have stabilised at around 5,700.

Chinese is the fourth largest language at A level, and is continuing to grow noticeably. Italian and Russian are some way behind and were holding steady until the last two years, when they began losing their numbers. Smaller languages, including Bengali, Urdu, Modern Hebrew, Modern Greek, Portuguese and Japanese, have also dropped although Turkish has grown somewhat.

A Level Entries for Less Widely Studied Languages 1997-2002

	1997	1998	1999	2000	2001	2002
Chinese	1,093	1,235	1,285	1,359	1,375	1,735
Urdu	1,184	675	637	742	485	690
Japanese	361	386	339	340	221	251
Turkish	181	222	224	259	-	234
Modern Greek	272	295	219	233	125	191
Panjabi	282	274	175	231	226	132
Polish	107	130	127	152	97	80
Portuguese	137	126	143	151	111	157
Bengali	141	157	54	67	58	53
Modern Hebrew	51	34	33	25	16	30
Dutch	40	16	23	17	37	29
Total	**3849**	**3550**	**3259**	**3576**	**2751**	**3582**

Source: CILT Yearbooks 2002 and 2003

In Scotland, the decline in languages in the school leaving year has been identified as a serious national problem, since the numbers sitting Highers in modern languages have declined by nearly 50% over a twenty-year period. French has had the largest fall, along with Russian, which has almost disappeared, while Spanish has increased by

some 50%, but represents a small proportion of the total.[3] Students in Scotland take a wider range of subjects at Highers, and new examinations have recently been introduced, including a new Higher and an Advanced Higher.

The long-term decline reached its low point in 1999, since when the numbers of students taking languages have begun to increase, and have now risen above the 1997 level.

Scottish Higher Grade 1997 - 2002 (Includes New Highers from 2000)

SUBJECT	1997	1998	1999	2000	2001	2002
French	4,840	4,619	4,244	4,194	4,300	4,771
German	2,078	1,962	1,891	2,021	2,036	2,206
Italian	188	201	200	206	189	284
Russian	22	19	16	17	13	14
Spanish	788	874	804	764	834	915
Total	**7,916**	**7,675**	**7,155**	**7,202**	**7,372**	**8,190**

Source: SQA. Figures for 2002 are provisional

Certificate of Sixth Year Studies 1997 to 2002 (Includes Advanced Highers from 2001)

SUBJECT	1997	1998	1999	2000	2001	2002
French	407	328	452	410	490	574
German	198	177	184	148	248	252
Italian	10	8	8	10	12	23
Russian	3	2	2	-	6	3
Spanish	52	49	78	78	99	143
Total	**670**	**564**	**724**	**646**	**855**	**995**

Source: SQA. Figures for 2002 are provisional

1.2 Higher education

The most accessible measure of demand in higher education is the numbers of students applying and being accepted for university entrance. These figures are well known and well documented. However, this measure only captures demand for language degrees, that is, those that reflect the language content in the degree title. The demand for students to maintain or upgrade their languages or learn a new language while studying another discipline is more difficult to capture, and can be estimated indirectly from other official data and from periodic surveys of providers.

In summary, there has been a growth in demand for supplementary language study, accompanying a range of disciplines. This has focused on the main European languages. Students can combine a language with most other subjects, and the most popular combinations are with Business studies, English and Law. In specialist language degrees, however, where students take a single language or a combination of languages, applications have declined and there is an excess of places for the number of applicants.

1.2.1 Language degrees

Entrance statistics for higher education are published by the Universities and Colleges Admissions Service (UCAS). According to these figures, the decline in applications for language degrees has been proceeding at around 4-5% per year since the boom years of the early 1990s.

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Accepted Applicants in UK Modern Language Degrees 1997-2001

	1997	1998	1999	2000	2001
French	3,130	2,800	2,600	2,373	2,221
German	1,266	1,140	1,107	985	949
Spanish	1,176	1,197	1,259	1,211	1,225
Russian	263	215	178	173	144
Italian	511	493	474	443	416
Other named languages*	912	827	759	788	834
Other or unspecified langs**	3,112	2,865	2,540	2,520	2,253
All ML	**10,370**	**9,537**	**8,917**	**8,493**	**8,042**
All subjects	**308,236**	**302,683**	**307,677**	**311,635**	**329,281**
ML as % of all candidates	3.36%	3.15%	2.90%	2.73%	2.44%
% change since 1997		-8.03%	-14.01%	-18.10%	-22.45%

* Figures include named languages under subject codes R5, R6, R7, T1, T3, T4, T5, T6, and T7

** Figures include T2: Other European Languages and T9: Other Modern Languages

(these include combined language degrees listed as "Modern Languages")

Source: UCAS

The number of students admitted has declined less sharply than applications. The number of applicants is now close to the number of admissions, which means that almost everyone who wants a place to study languages can find one. In the last five years, the number of students admitted has fallen by a quarter, from 10,400 to 8000, corresponding to around a quarter of the corresponding A level cohort. At the same time the number of students entering higher education has risen by 9% overall. Language degrees have lost nearly a third of their market share, and now contain around 2.4% of all undergraduates.

In some language degrees, there are more admissions than applicants. This apparently impossible outcome is partly explained by the practice of admissions tutors, who are inclined to steer applicants towards language majors or single honours degrees rather than the combined honours courses for which they have originally applied. Another aspect is the increasing dependence of language degrees on recruiting students during the 'clearing' process after they have obtained their results, in order to fill their quotas.

The balance of demand for languages is shifting. The most popular degrees are now combined languages, which include degrees with two languages and also European Studies with a language component. Close behind comes French as a single subject. But both of these degrees have declined by more than 20% over the past four years. Spanish has overtaken German as the second most popular single language. It has kept its numbers, while German has fallen by 17% over four years. Italian and particularly Russian are falling sharply, while demand for less widely taught languages has held steady at a little over 800 applicants per year.

A significant number of students apply for degrees combining a language with one or more other subjects. Anecdotal evidence suggests that this number is growing overall, though there is no national data against which to check this.[4] Moreover, popular combinations have waxed and waned over time. Students can choose to combine languages with most other subjects. In rank order, the ten most popular combinations, all attracting in excess of 100 students per year, are those with:

1. Business and management
2. English
3. Law
4. History
5. Politics
6. Economics
7. Philosophy
8. Psychology
9. Computer science
10. Linguistics

A wide range of other combinations is also available, but they are sought by smaller numbers of students. Artistic studies including Art History, Fine Arts, Music, Drama and Cinematics are popularly combined with both European and Asian languages, while Media Studies, Communications, Marketing and Market Research may be combined with European languages. It is noteworthy that combinations of Foreign Languages and Journalism attract very few students.

The present study does not deal with postgraduate studies in the area of languages. This is a small and specialised sector.

1.2.2 Languages for all

There has apparently been buoyant demand for language study as an optional or subsidiary addition to studies in other disciplines. The evidence for this is partial, and based on surveys and extrapolations. Two national surveys have been made for higher education in England, and several regional surveys are also available.[5] Some deductions can be made from detailed analysis of enrolments on individual modules.[6] According to official figures from the Higher Education Statistics Agency (HESA), around 71,000 students were taking at least one accredited module in languages in 2001/2. This represents 4.6% of all students, and has declined from 90,000 (6.4%) in 1998/9.

All Modern Language students in Higher Education (modular figure)

	1998	1999	2000	2001
Modular figure (1)	90,065	77,850	74,590	70,725
All students (2)	1,413,063	1,442,417	1,447,710	1,541,925
% of all students taking languages	6.37%	5.40%	5.15%	4.59%

1. All first degree students studying languages in any capacity.

2. Total numbers of first degree students in all programmes.

Source: HESA

The HESA figures include both language specialists and students taking
a language course to supplement their main subject. There has been anecdotal evidence that, in terms of student numbers, the increase in 'supplementary' language study has been roughly the same as the decrease in language degrees. However, this is not borne out by the HESA figures, which show a similar overall rate of decline to the decline in admissions to language degrees shown by UCAS: an average of 4-5% per year. It appears likely the number of students studying supplementary languages is similar to the number taking language degrees.

An important proviso, however, is that the HESA figures do not include students for whom studying a language is not a specifically accredited part of their programme. This kind of language learning is routinely provided by many universities, in forms that are not captured by official data, since students take the language courses outside their degree programme. There is no reliable data for this kind of provision, though informed sources suggest that the rise in demand for supplementary languages is continuing rather than decreasing.[7]

In Scotland, the pattern is clearer, since the total number of students studying languages has increased by around 15% over the past seven years, to around 8,000. However, the increase is accounted for entirely by a tripling of the numbers taking sub-degree courses, while the number taking a first degree in languages has actually fallen by 8% over the period.

Across supplementary languages programmes in the UK, the existing survey information suggests that more than 90% of students choose to study a European language, with French a little ahead of Spanish, followed by German and Italian. After that, Japanese, Russian, Dutch and Chinese have a significant presence, but other languages attract vanishingly small numbers.

The level of study required is overwhelmingly at the earlier levels of attainment, in beginners or post-GCSE stages, with only 17% of students following post-A level type courses. This pattern is most pronounced in the languages less studied in school.

Of the students choosing to do supplementary language study, over half are in their first year of study, a quarter are in their second year, and 10% each are in later years, suggesting that demand for such courses tapers off

sharply through the degree programme. A quarter of the students are following degrees that contain a language study requirement.

Around a third of the demand for accredited language courses outside language degrees comes from students on Business studies programmes, and for some of them it is a course requirement (for example in International Business) that continues to the end of their degree. Other areas of high demand are the Humanities (16%) and social sciences (10%), followed by the physical sciences (7%).

1.3   Patterns in other countries

The trends in demand for languages, outlined above, are not confined to the UK. They are echoed in other English-speaking countries, with some differences in pattern. They are also echoed in other European countries, with the key difference that demand for English as first foreign language is overwhelmingly dominant, and that governments have intervened to promote the learning of other languages.

1.3.1 The English-speaking world

The shifts in demand for languages are well documented in Australia and the United States. In Canada, demand for German in higher education is well documented. In Ireland the need to monitor trends in language provision has been recognised, although detailed information is only available in respect of secondary schools.

Australia

In Australia, the past decade has witnessed steady erosion in the support for languages of small candidature in schools and higher education alike. Nine 'languages of wider teaching' represent the bulk of foreign language teaching in Australian schools,[8] although the majority tend to offer only one European and/or one Asian language. The Australian government is currently conducting a review of Languages Other than English (LOTE) in Australian schools in response to recent changes in both supply and demand. Clearly, major concerns are not confined to the UK alone. Across Australia as a whole, the past ten years have seen a steady decline in language study among the final year cohort in schools. Statistics indicate that those who do study languages are tending to abandon traditionally studied European languages such as German, French and Italian, in favour of Japanese and Chinese.

Year 12 Language Candidates in 2 Australian States

South Australia 1992-2001

	1992	1995	1998	2001
Chinese	98	230	218	316
French	352	240	232	244
German	399	302	244	303
Italian	273	241	179	239
Japanese	180	270	414	363
Spanish	64	99	95	112
Total - languages	**1,093**	**1,141**	**1,203**	**1,338**
% change since 1992	-	4.39%	10.06%	22.42%
Total - students in cohort	59,258	41,543	41,670	41,192
Languages as % of total cohort	**1.84%**	**2.75%**	**2.89%**	**3.25%**

Source: SSABSA

Queensland 1997-2001

Year 12	1997	1998	1999	2000	2001
Chinese	274	357	386	373	418
French	657	649	692	682	636
French Extension		12	11	23	14
German	849	850	812	737	673
German Extension	18	11	1	7	18
Indonesian/Malaysian	236	250	232	222	209
Italian	146	115	131	133	145
Japanese	1789	1782	1786	1783	1600
Korean		4	1	2	5
Modern Greek	7	12	9	3	15
Russian	3	5	4	11	11
Spanish	18	23	34	20	29
Vietnamese	24	58	85	72	42
Total	**4021**	**4128**	**4184**	**4068**	**3815**
% change since 1997	-	2.66%	4.05%	1.17%	-5.12%

Source: Queensland Studies Authority

Statistics on school education are collected by a range of authorities in each state. In South Australia, figures indicate that the two most popular languages for final year exam candidates are now Japanese and Chinese, having overtaken German, French and Italian. Languages are a small but growing proportion of the cohort (3.25% in 2001). In Queensland, Japanese is by far the most popularly studied language, although candidate numbers have decreased recently. German is dropping steadily, while French has maintained around 17% of the total market share for languages. Chinese, alone, has grown substantially, from 6.8% of total language enrolments in 1997 to almost 11% in 2001.

In the Higher Education sector, first year student numbers in language departments have been maintained to a certain extent by the introduction of new courses in *ab initio* languages. However, largely owing to the modular structure of Australian degree programmes, retention rates in higher years, including optional fourth year honours programmes, are increasingly difficult to maintain. In recent years, several investigations have been carried out into the teaching of languages other than English in Australian universities.[9] While this research has tended to be qualitative rather than quantitative, the following significant findings have emerged:

1. full language programmes from 1st year to 4th year have decreased;
2. more languages are increasingly offered only subject to demand;
3. more language teaching is contracted out;
4. there has been an increase in collaborative arrangements;
5. increasing numbers of students from non-Arts disciplines are integrating languages into their studies;
6. beginner enrolments have risen at the expense of post-matriculation enrolments;
7. a (supplementary) diploma of languages has been introduced at some institutions;
8. programmes in Languages for Special Purposes (LSP) are limited.[10]

In addition to these findings, one investigator notes that individual language programmes have moved to reducing the numbers of hours taught per language, increasing class sizes or replacing face to face contact with other forms of language teaching to compensate for diminishing resources including staff. Australian universities have lost approximately 100 language teachers over the past five years with many language departments now staffed by just one or two staff members or by casual staff.

United States

The pattern of secondary schooling in the United States has been tracked by the American Council on the Teaching of Foreign Languages.[11] Approximately one third of public secondary school students learn a second language, and in the six years 1994-2000 there was a slight increase of 1%. The majority, almost six out of seven million, are in the high school stage, representing 44% of the cohort. However, nearly 70% of these students are studying Spanish, which continues to increase its predominance, with French (18%) and German (5%) slipping back.

Higher education in the US is tracked by the Modern Languages Association, whose last report (referring to 1998) showed a modest increase in modern foreign language registrations.[12] Most of that was in Spanish, up by 10% over three years, and now accounting for 70% of modern languages in the two-year college sector. French and German are the next largest languages, but declining by 1-2% per year. The fourth language, Japanese, is now falling, while Italian is gaining ground. Smaller languages are rising and falling in favour.

Higher Education Enrolments in USA Language Degrees

	Two year Colleges			Four year institutions Undergraduate			Four year institutions Graduate Registrations		
	1990	1995	1998	1990	1995	1998	1990	1995	1998
Spanish	133,823	163,217	179,504	391,431	432,133	468,040	8,690	10,936	9,046
French	44,366	30,515	29,807	220,980	168,027	164,407	7,126	6,809	4,850
German	19,082	11,689	11,645	109,961	80,393	74,437	4,305	4,181	2,938
Japanese	10,308	9,429	9,219	34,522	33,888	32,588	887	1,406	1,334
Italian	8,325	6,430	7,146	40,599	36,287	41,216	815	1,043	925
American Sign Language	1,140	3,394	7,003	439	852	4,254	23	58	163
Chinese	3,506	4,463	4,764	15,148	20,966	22,472	836	1,042	1,220
Russian	3,472	2,000	2,286	39,468	21,305	20,541	1,686	1,424	964
Arabic	423	196	1,158	2,687	3,807	3,902	365	441	445
Latin	909	827	840	26,311	24,030	24,411	958	1,040	894
Korean	141	169	624	2,099	2,943	3,546	46	231	309
Hebrew*	786	819	533	8,596	8,860	11,740	3,613	3,448	3,560
Portuguese	365	462	480	5,516	5,359	5,958	330	710	488
Ancient Greek	283	221	193	11,367	11,666	11,738	4,751	4,385	4,471
Other ML	1,491	2,871	2,321	10,968	12,877	14,254	1,197	1,523	1,196
Total	**228,420**	**236,702**	**257,523**	**920,092**	**863,393**	**903,504**	**35,628**	**38,677**	**32,803**
% change since 1990	-	3.63%	12.74%	-	-6.16%	-1.80%	-	8.56%	-7.93%
% change since 1995	-	-	8.09%	-	-	4.65%	-	-	-15.19%

	Totals for all institutions		
	1990	**1995**	**1998**
Spanish	533,944	606,286	656,590
French	272,472	205,351	199,064
German	133,348	96,263	89,020
Japanese	45,717	44,723	43,141
Italian	49,739	43,760	49,287
American Sign Language	1,602	4,304	11,420
Chinese	19,490	26,471	28,456
Russian	44,626	24,729	23,791
Arabic	3,475	4,444	5,505
Latin	28,178	25,897	26,145
Korean	2,286	3,343	4,479
Hebrew*	12,995	13,127	15,833
Portuguese	6,211	6,531	6,926
Ancient Greek	16,401	16,272	16,402
Other ML	13,656	17,271	17,771
Total	**1,184,140**	**1,138,772**	**1,193,830**
% change since 1990	-	-3.83%	0.82%
% change since 1995	-	-	4.83%

*Combined Modern and Biblical Hebrew totals.

Source: Brod and Welles 1998

One of the authors of the survey[13] comments that languages in higher education 'resemble an obese human', with a large body of language learning mainly at early levels of attainment, and an increasingly small head comprising the study of upper-level language, literature and culture. The expansion of two-year numbers exceeds that in four-year institutions, while the numbers of graduate students are in steady decline. Proportionally, languages have reached a steady level of around 8% of total college enrolments over the last twenty years.

Canada

English and French are both national languages in Canada, and are consequently learned as both first and second languages. German is the main foreign language. Figures for higher education enrolments for it are collected by the Canadian Association of University Teachers of German. Enrolments grew until 1994/5, then declined sharply, before registering a recovery in 1999-2001. Preliminary reports indicate that the recovery has continued in 2001-2.

German Enrolments 1990 - 2001 for 42 Universities in Canada

	90/91	91/92	92/93	93/94	94/95	95/96
Enrolments*	19,130	20,176	21,812	21,142	21,060	20,475
% change since 1990	-	5.47%	14.02%	10.52%	10.09%	7.03%

	96/97	97/98	98/99	99/00	00/01
Enrolments*	19,027	17,736	16,389	17,019	17,777
% change since 1990	-0.54%	-7.29%	-14.33%	-11.04%	-7.07%
% change since 1995	-7.07%	-13.38%	-19.96%	-16.88%	-13.18%

* Totals are approximate as not all insitutions provided data each year.

Source: CAUTG Enrolment Survey May 2001

Ireland

Statistics on foreign language study in Ireland broadly reflect the trends observed in the UK and elsewhere in the English-speaking world. French is overwhelmingly the most popular language, with around four times as many students as German. Spanish is growing in popularity, though numbers are small, around a fifth as many as German. Candidate numbers for Ordinary and Higher Grade Leaving Certificate examinations have fallen steadily throughout the period 1997-2002, though not as sharply as in England. The decline has also affected Irish, which is a second language for most students. Nonetheless, in 2002 the number of students taking French at Higher Grade in Ireland (15,212) was about the same in absolute terms as the number taking the equivalent A level French in the UK (15,614), on a much larger population base. No precise figures are available for languages in higher education.

Numbers of Irish Leaving Certificate Candidates, 1997-2002

Ordinary Grade

	1997	1998	1999	2000	2001	2002
French	18,542	19,457	18,917	19,189	17,764	16,903
German	3,854	4,138	3,919	3,830	3,505	3,552
Irish	33,759	34,043	33,563	31,862	29,868	28,906
Spanish	558	685	553	603	612	739
Total ML	**56,713**	**58,323**	**56,952**	**55,484**	**51,749**	**50,100**

Higher Grade

	1997	1998	1999	2000	2001	2002
French	17,426	17,628	17,954	16,785	16,054	15,212
German	7,531	7,235	6,910	6,401	5,874	5,170
Irish	16,482	17,733	17,221	16,958	15,719	14,901
Spanish	859	989	1,007	820	871	963
Total	**42,298**	**43,585**	**43,092**	**40,964**	**38,518**	**36,246**

Source: A. Gallagher. University of Maynooth

1.3.2 Non-English-speaking Europe

The patterns of demand for languages vary considerably across European countries where English is not a first language. At secondary level, the majority of countries insist on the study of one, two or more languages during post-compulsory academic schooling, regardless of the disciplinary stream chosen. Foreign languages are optional only in Italy, as in Ireland and the UK. The emphasis on languages in vocational colleges tends to be less pronounced, although many institutions are now introducing optional or compulsory language courses for students of all disciplines. The major change of recent years has been the increasing dominance of English as the first foreign language, and the corresponding decline of other major languages. Several countries are responding by insisting on students learning a second foreign language.

In higher education, figures are not always easy to obtain, but the pattern of study is similar. This is confirmed in many of the national reports produced by the Thematic Network in Languages, though detailed figures are not generally provided. Many countries have a policy of compulsory foreign language learning at tertiary level. This is the case in the majority of the Eastern and Central European countries and parts of Northern and Western Europe. In the remaining countries, it is usual for students in most degree programmes to have access to optional units in foreign languages, and many institutions also offer voluntary, non-accredited language courses. Again English is increasingly dominant.

France

In France, detailed information is available.[14] Over the past fifteen years or so, its government has developed policies for extending language learning through all sectors of education. Learning a foreign language is now compulsory in primary schools, and is extending into the earlier years, so that from 2005 all five-year olds will learn a language. Learning two foreign languages has been compulsory in secondary schools since 1998, and is being extended into higher education. Arrangements are being introduced for bilingual teaching, 'European sections', exchanges, work experience abroad, national certification of language competence, and a range of other measures to boost language learning. Most secondary school students, over four million in number, learn English as a first foreign language, followed by German (half a million). Spanish is almost exclusively studied as a second foreign language, but is the favourite in this category, with a million and a half learners, while a further half million choose German as second.

In higher education, on the other hand, the total number of students taking language degrees declined by 20% over the years 1994-2001. This was wholly due to a dramatic decline in traditional degrees (literature and civilisation), which originally comprised three quarters of all language degrees and now comprise 62%. The newer degrees (applied languages, French as a foreign language, regional languages) all showed strong growth, but from a much smaller base. In the last year, the decline in literary degrees has accelerated, with a drop of nearly 9% on the previous year, while growth in the other language-related degrees has slowed or reversed. 64% of students are studying English, with 28% Spanish, 13% German and 6% Italian.

Language students in France by sector

	1994	1995	1996	1997	1998	1999	2000	2001
French as a foreign language (FLE)	5,465	5,681	7,680	8,633	8,657	8,126	8,787	8,984
Foreign languages literatures and letters (LLCE)	120,764	120,229	112,536	107,137	100,525	95,631	90,190	82,375
Applied foreign languages (LEA)	34,879	33,495	33,718	33,294	34,868	36,507	38,043	37,091
Regional languages and cultures (CLR)	775	869	813	856	1,029	1,138	1,323	1,342
All languages	**161,883**	**160,274**	**154,747**	**149,920**	**145,079**	**141,402**	**138,343**	**129,792**
Change since 1994		-0.99%	-4.41%	-7.39%	-10.38%	-12.65%	-14.54%	-19.82%

Source: French Embassy Note d'information 02/39

Part 2

What is changing in the structure of provision?

Since post-16 education is largely a market-based system, led by student choice, the provision of languages closely reflects the patterns of demand. That is, the supply of teaching in languages broadly meets the demand. However, the changes in the patterns of demand have necessarily created tensions in the system of provision, which was originally developed to respond to a quite different pattern. In particular, new and more differentiated types of provision have emerged, while older types of provision have come under threat. In both cases, gradual developments have reached threshold points. For example, in areas where demand has declined, there are points beyond which it has proved impossible to maintain previous forms of provision. Conversely, in areas of growing demand, there are points beyond which it has proved necessary to establish new forms of provision.

The changing patterns in the structure of provision are less easily measured than patterns in the extent of demand, but this section seeks to identify the main areas where new patterns appear to have emerged.

2.1   16-19 sector

2.1.1 Concentration of A levels

As the number of students sitting A levels has decreased, their academic profile has changed, with a very striking growth in the proportion of grades A and B in all languages. A number of factors may be responsible and more work is required to elucidate this.

A-Level Grades in Languages 1992 - 2001

All A Levels 1992-2001
Percentage achieving each grade

	A	B	C	D	E	N	U
1992	12.8	16.3	17.4	18	15.3	9.8	10.4
1993	13.8	16.7	17.7	18.1	14.8	9.3	9.6
1994	14.8	17.1	18.6	18.1	14.4	8.8	8.1
1995	15.8	17.2	19	18.1	14.1	8.4	7.5
1996	16.2	18.1	19.8	18.3	13.7	7.6	6.4
1997	16.2	19	20.5	18.5	13.4	7.2	5.2
1998	17.2	19	20.9	18.3	12.9	6.9	4.9
1999	17.8	19.2	21.1	18.2	12.7	6.6	4.5
2000	18.1	19.3	21.3	18.4	12.4	6.3	4.2
2001	19.1	19.4	21.5	18	12.1	6	3.8

A Level French 1992-2001
Percentage achieving each grade

	A	B	C	D	E	N	U
1992	17.6	17.3	19	18.4	14.4	8	5.3
1993	18.6	17.3	19.5	18.5	13.6	7.6	4.9
1994	19.9	17.7	19	17.4	13.4	7.8	4.7
1995	20.2	18.3	19.3	17.6	13.4	7.1	4.1
1996	20.9	18.1	20.3	17.3	12.5	6.8	4.1
1997	20.6	20.5	19.9	16.8	12.2	6.6	3.4
1998	22.2	20.8	19.6	17	11.5	6	2.8
1999	23.6	20.6	20	16.3	11.3	5.4	2.8
2000	23.9	21.6	20	16.2	10.5	5.4	2.5
2001	25.2	20.8	19.6	16	10.5	5.3	2.7

A Level German 1992-2001
Percentage achieving each grade

	A	B	C	D	E	N	U
1992	20.1	18.7	18.6	16.6	12.7	8.3	5
1993	21.1	19.4	18.8	16.3	12.3	7.4	4.8
1994	21.7	18.8	18.7	16.9	13.1	6.8	4
1995	22.5	18.6	19.1	16.7	12.3	6.9	3.9
1996	23.7	18.4	18.9	16.7	12.2	6.5	3.7
1997	24.4	19.3	18.5	16.6	12	6.3	2.9
1998	27.3	19.1	19.7	15.3	10.6	5.4	2.6
1999	27.8	19.8	18.8	14.8	11	4.9	2.8
2000	29.9	19.9	18.4	15.1	10.2	4.6	2
2001	29.5	20.1	18.9	14.6	10.1	4.5	2.3

A Level Spanish 1992-2001
Percentage achieving each grade

Year	A	B	C	D	E	N	U
1992	20.9	19.7	18.8	16.9	13.2	6.1	4.3
1993	21.1	19.9	18.8	16.8	11.7	6.6	5.1
1994	23.5	21.1	20.6	15.7	9.6	5.3	4.2
1995	22.5	20.8	19.9	15.7	11.1	5.7	4.4
1996	24	21.9	18.9	15.2	10.3	5.4	4.3
1997	25	22.3	19.2	15.9	9.2	5.1	3.3
1998	26.2	22.8	19.9	14.2	9.6	4.2	3.1
1999	25.2	24	20.3	15	8.7	3.8	3
2000	25.9	24.5	19.8	13.8	9.1	4.1	2.7
2001	28.4	23.5	19.1	13.5	8.8	4.2	2.5

A Level Italian 1998-2001
Percentage achieving each grade

	A	**B**	**C**	**D**	**E**	**N**	**U**
1998	42.5	23.3	17.8	9.2	4.2	2.2	0.7
1999	43.7	24.8	16.4	9.3	4	1.2	0.4
2000	43.9	25	18	7.5	3.5	1.5	0.5
2001	44.6	24.2	15.9	7.6	5.3	1.7	0.7

A Level Russian 1998-2001
Percentage achieving each grade

	A	**B**	**C**	**D**	**E**	**N**	**U**
1998	69.2	15.7	6.4	4.4	2.2	1.5	0.7
1999	73.5	13.6	6.3	4.2	1.7	0.7	0
2000	72.5	12.7	8.4	4.1	1.2	0.7	0.3
2001	76.3	11.7	7.3	3	0.9	0.6	0.2

Source: QCA

It is possible that the exams are easier, though this is unlikely, and does not correspond to the reactions of students and teachers. It may be that the teaching is more effective, as inspectors reports appear to suggest. It is probable that less able students are discouraged from taking A level languages, since the reputation of languages is that they are relatively difficult. It is probable also that a higher proportion of students from the independent sector are sitting language A levels than students from the state sector.

The figures would suggest that there has been a growing elitism in languages. It is likely to be in part an academic elitism, which encourages the more able students to tackle A level languages, and provides them with better and more focused teaching. It may well be compounded by an element of educational elitism in which languages are more concentrated in academically more successful schools. The greater emphasis on languages in the independent sector is well known, and it may be that language specialist schools are having some impact on A level results, though their numbers are relatively small.

2.1.2 Languages as a supplementary subject

The question was posed earlier of how far AS levels are satisfying new and previously unmet demands for a one-year language course in the sixth form, and how far they are replacing A level by catering for students who would previously have done a two-year language course. In either case, the conclusion is clearly a growth in the numbers of students using a language course to supplement their main subjects.

It confirms evidence in the higher education sector that languages are increasingly seen as a useful additional subject, adding value, rather that an academically valued subject in its own right. This perception is also no doubt strengthened by the major focus of recent campaigns to promote languages as a career advantage and as a key skill.

2.1.3 Differentiating provision

The growth of GCSE and AS level languages has placed increasing pressure on teacher supply, already dogged by teacher shortages. The increasingly vigorous efforts to recruit teaching and support staff from non-traditional sources have had the effect of differentiating language provision from provision in many other subjects. This is not necessarily damaging.

For example, a growing number of foreign nationals is being recruited to teach their mother tongue. In many cases this produces an enhancement in learning through contact with authentic language speakers, and the differentiation of languages may be an asset. Or again, language learning programmes may make greater use of independent learning facilities to compensate for a lack of face to face teaching. These can enhance learning as well as 'learning to learn', use of technology and other key skills. However, in both cases, the benefits of these responses can be counterbalanced by disadvantages if they are delivered inadequately. It seems likely that these responses are becoming more widespread.

Other responses have clearer disadvantages. Examples include the on-the-job training of teachers of French to teach another language, usually Spanish; the use of more temporary teaching; and the use of peripatetic teachers or the sharing of teachers across several establishments. In most cases, the solution is arguably better than the alternative of offering no teaching at all, but there is an inherent risk in these approaches that they may make it more difficult to maintain standards and motivation.

Languages also have a semi-clandestine existence outside the main school curriculum. Anecdotally, it is reported that constraints of subject choice, limiting the number of combinations available to students, commonly make it difficult for a second foreign language to be taught in normal school hours. There may also be increasing numbers of language clubs offering languages outside the curriculum structure.

In various ways, language provision appears differentiated from other subjects. The differentiation does not necessarily mark languages as more marginal and lower in academic status, and may mark them as 'special' or a luxury item.

2.2   Higher education

2.2.1 *Concentration of language degrees*

Over the past five years, the number of departments providing language degrees has declined. In a small number of cases, particular universities have simply closed their languages departments, with some high profile casualties, especially (though not exclusively) among the post-1992 universities. More commonly, though, institutions in difficulties have avoided the bad publicity of closures and have simply run down their languages programmes through natural wastage. This has been assisted by early retirement packages, taking advantage of the high proportion of staff who were recruited in the 1960s and 1970s, and who are now over 50 years of age. In many cases, they have left their language degree programmes on the UCAS lists, despite the low level of applications.

As a result of this process, none of the post-1992 universities in Scotland now teaches languages to full degree level, and a growing number of new universities in England are ceasing to do so. While this pattern may look intuitively unsurprising with the declining numbers of students, noted earlier, it may not just be a product of shrinkage.

The changes in Scotland have occurred in a context of largely stable numbers of Honours graduates. It is true that German and Russian have declined in numbers over the past five years, but the numbers of graduates in French (the majority language), Spanish and Italian have remained stable, and have even shown increases over the last two years.[1] The numbers of first year entrants continue to rise.

Overall in the UK, however, numbers of students taking languages degrees have fallen by about 19% over the last four years. In that context, the concentration of languages into a smaller number of institutions has developed to a noticeable extent. In 1997-8, the twenty largest providers of languages accounted for 55% of undergraduates studying a language as part of their degree.[2] In 2000-1, the proportion taught by the twenty largest had risen to 63%. The same pattern is found in all individual languages. For example, in Spanish the market share of the twenty largest providers rose from 76% to 84%. It is also found in most cases for the ten and five largest providers. For example, in French, the ten largest rose from 42% to 47%. German, though showed a more stable share for the five and ten largest. This is a tendency confirmed elsewhere. In German studies in Canada, for example, the top ten universities accounted for 53.5% of students in 1990, rising to 55.4% in 2001.[3] The trend is paralleled by European studies degrees in the UK, which have seen consolidation of students in one third of the 30 programmes nationally, while the remaining programmes have declined sharply.

The concentration of language studies is remarkable in its extent. A quarter of all students studying languages are to be found in only five universities – though not the precise same five universities as dominated four years ago. Or again, one quarter of universities offering French modules account for two thirds of all students of French.[4] It is likely that the pattern will be accentuated over the next few years, now that the government cap on student numbers has been lifted, opening the sector to even sharper market forces. Already, anecdotal evidence points to more popular universities enjoying a bumper intake in October 2002, while less favoured institutions are left struggling for students.

2.2.2 Thinning of language degrees

Within the majority of universities that maintain degree level provision, the range of languages is contracting. In Scotland, only four universities offer full degree provision in five or more languages, and two of them are in collaboration talks to preserve the range.[5] In England, Scotland and Wales, the core now comprises French, German and Spanish, with Italian and Russian restricted to a narrower range of universities.

The thinning process initially shows itself in the decline of single honours or major degrees in a language. It has affected all languages, and most of all the smaller languages, such as Russian, though German is now increasingly only available in combinations. A usual accompaniment of this is a loss of range in cultural and social studies related to the language, as the provision retrenches around the core activity of language learning. Student choice is necessarily more limited as the non-language ('content') part of their degree occupies a smaller part of their studies. In conditions of continuing decline, the range may be further reduced as departments attempt to group students into course units with sufficient numbers to be economically viable. Data from HESA also shows that there is a noticeable increase in the numbers of part-time students in languages, while full-time numbers decline. In many cases, part-time and full-time students follow a similar academic programme. However, in many cases, their interests are concentrated in the language (rather than content) aspects of courses.

A corollary of the thinning process is the erosion of the languages component of degrees previously incorporating a language. A growing number of integrated degrees are offering programmes in which a language is an optional rather than compulsory component. For example, a recent survey reported a decline in undergraduate numbers for degrees in European Studies, resulting in widespread reduction of language requirements. Only half of the undergraduate programmes now have a compulsory language component; only half require an exchange period abroad; and the standard of language attainment of student entrants has fallen noticeably, with an upsurge in ab initio teaching offered. Overall, the discipline has shifted decisively away from languages toward the social sciences.

2.2.3 Mergers, liquidations and cooperation

In parallel with the thinning of degree programmes, the numbers of academic staff involved in teaching language degrees may well be reduced. However, perhaps surprisingly, the HESA data returns do not show a clear correlation between staff numbers and reducing students numbers. A part of the explanation for this is that a minimum level of staffing is required in order to deliver a programme, regardless of the number of students enrolled on it. When student numbers fall below the level required to sustain a programme, the programme may be maintained with a subsidy. This is particularly common in languages, where combined degrees are frequent, and where degree programmes are often closely linked with teaching of languages to students of other disciplines. In these circumstances, the termination of one language programme can cause collateral damage to others. As a result it is likely (as anecdotal evidence suggests) that many language degrees, though not economically viable, are continuing in a subsidised form. The search for economic viability has generated a number of responses, each with its own academic logic.

The most common response has been the combination of several language departments to form a larger unit, either in a confederation or in a single merged department or School. This may expect to generate academic or managerial synergies, rationalise cross subsidies between languages, and/or realise economies of scale.

A second common response has been to merge all languages into a larger unit, such as a business school or a

humanities department. This may expect to provide a secure economic environment in which languages play a supporting role alongside another stronger discipline, such as business studies or English.

A third response, which is becoming more common, is to disband a languages unit, redeploying its members to other units, from where they may or may not continue to contribute to a languages degree, as circumstances allow. Since the 'content' of languages degrees is normally interdisciplinary, it is not uncommon for staff to be relocated into other departments focusing on literature, history, politics, education, film, business or media and communications. And since the interpersonal and educational skills content of languages is considerable, staff may also be relocated into management, or into academic support services such as learning technology, education development, quality assurance or general academic administration. There are many examples of staff making these transitions very successfully.

A fourth response, still relatively uncommon, is to engage in inter-institutional collaboration, with the aim of combining the resources of two or more units to achieve a better range of language provision than would be possible for a single institution. Pilot studies are being funded by HEFCE to explore the possibilities, and inter-institutional discussions are taking place in Scotland. In both cases, it is too early to judge the results. However, evidence from Australia suggests that this has become the expected response for 'subjects of low enrolment' where institutions need access to teaching in a particular discipline but cannot economically justify mounting full provision from their own resources.

The fifth response has been to relocate staff into units specialising in language provision for students of other disciplines. The attraction of this solution is that many such units are currently enjoying buoyant student numbers. Language teaching specialists are more valued there than in traditional departments, and that there may be extensive opportunities for innovative teaching, entrepreneurship and links with the wider community. On the other hand, for academic staff who have regarded language teaching as a less rewarding part of their duties, this kind of relocation may appear as a kind of internal exile.

Each of these five responses has its appeal in particular circumstances, specific to an institution or to an individual. Each of them can lead to an enhancement of education in languages by matching organisational structures to the changing environment. However, each also entails some element of loss, for example, by disbanding or reducing the autonomy of an existing academic unit, by changing the academic location and identity of staff, or by reducing the academic breadth of programmes. And if poorly implemented, these forms of restructuring can have the effect of exacerbating the difficulties they were intended to alleviate.

2.2.4 Language provision for all

The numbers of students seeking language courses to support their other disciplines continue to be relatively buoyant. There have traditionally been three ways of meeting this demand. They might broadly be described as the integrated, the separated and the distributed approaches.

The integrated approach is based on language teaching being provided for all students by the academic groups responsible for teaching language degrees. This was the dominant model in the UK in the 1960s, and remains the main model in the United States.

In the most successful cases, in some European universities (including UK examples) integrated languages departments have provided high quality language teaching through securely employed language teaching specialists. The academic value of this teaching is well-recognised and extensive support and resources are provided.

The least successful examples of this approach have been analysed in the US, though examples of it exist in Europe, including the UK.[6] In this model, the tenured academic staff in language departments are mainly literary specialists, who employ postgraduates and other casual staff to do large amounts of 'service' language teaching on their behalf at the lower levels of attainment. They give poor recognition and support to this teaching, but they come to depend on the earnings from this teaching to support their permanent posts. Most recently, they have been compelled by economic necessity to do some of the teaching themselves, and have usually done it badly, further accelerating the decline in student numbers.

The separated approach is based on a clear academic division between languages departments and language centres. Language departments continue to provide teaching for students on language degree courses, while language centres, or institution-wide language programmes, provide teaching for students of other disciplines. This is now the dominant approach in Europe, including the UK. At its best it enables a well-focused and professional language teaching programme to be delivered, tailored as far as possible to the needs of students in business, law, or other disciplines, based on good practice, innovative pedagogy and using effective learning technology. At its worst it provides a cheap and precarious service. In both cases, there are recurrent risks of internal conflicts between language centres and language departments.

The distributed approach is based on language teaching arranged by each department or unit that requires it (for example, a law faculty or a business school) with the aim of providing language support for its own students. Usually this will be in an institution where several departments have their own language provision, and where other units also provide languages for different external constituencies (adults, businesses), or for different languages (e.g. English as a foreign language, modern languages). At its best, this teaching is carried out by staff with a close understanding of the home discipline of their students or the needs of their specific constituency, and is highly valued by the host department or the customers. At its worst it is a casual arrangement with staff unqualified in either language teaching or the home discipline, is little valued by its organisers or recipients, and is in conflict with other language providers in the institution.

As the demand for non-degree languages has risen, so has the importance of satisfactory structures to deliver them. Existing provision is often the legacy of ad hoc arrangements made to meet more limited demands, though many universities have recently conducted management reviews of their provision. The collapse of language degrees in some institutions has been accompanied by significant investment in language teaching units or language centres, to meet the robust demand for non-degree languages. In some cases they have been located in academic departments, and in others they have been assimilated to academic service departments, such as the library or computing services. There are very few universities that make no provision for non-degree languages.

It is clear that each of the three main approaches has its strengths and weaknesses, and in practice each institution invents its non-degree language provision in response to its own particular circumstances. There may, however, be scope for models of good practice in each approach to be more widely disseminated.

2.2.5 A different kind of provision

As with the growth of 16-19 supplementary languages there has been increasing pressure on teacher supply in non-degree languages. Traditionally, teaching and support staff have often come from different career paths than in language degrees. Though many foreign nationals are still recruited to teach their mother tongue, there is evidence of growing numbers of teachers entering foreign language teaching after experience in teaching English as a foreign language, often returning to the language of their first degree. There is increasing convergence between EFL and MFL, partly encouraged by the rapid growth in demand for EFL in universities, and partly by the rich pedagogical environment that has been developed around English.

Language learning programmes make greater use of independent learning facilities to compensate for the limited number of face-to-face teaching hours (typically 2-3 periods per week). And well-found language resource centres at best enjoy the support of learning advisers and technical staff who can supplement classroom-based learning, and also provide support for independent learners not enrolled in classes. Conversely, independent learning is sometimes offered as a substitute for taught units, and when inadequately supported it can amount to leaving students to fend for themselves.

Non-degree programmes are often provided on marginal funding, and sometimes rely on poorly trained staff. Since the extent of teaching required is often not predictable from one year to another, temporary staff may be

hired at short notice, and may not always have adequate qualifications. Typically, casual (or 'visiting') staff play an important role, and while in many cases they are well-qualified and effective teachers, this is not always the case. The same teacher may in practice earn his or her living by teaching hours at several institutions, and it may be difficult to provide them with sufficient training, induction or academic contact, when their presence depends on the constraints of their personal timetable and the need to make payment for their attendance. A recurrent difficulty is the frequent lack of any clear career structure for such staff, despite recent attempts to address the issue in the aftermath of new legislation. The resultant management difficulties are a challenge to heads of units, who may not always have the training, skills or resources necessary to manage a mobile and changing workforce.

Demand for non-degree language provision goes well beyond language options, and includes the demand from many students to learn a language outside their degree programme. Almost all universities make arrangements for voluntary classes, either funded by institutional subsidy, or funded directly by the students. This can range from ad hoc classes for a specific purpose, through non-accredited preparation for study abroad, to voluntary study for personal enrichment. It is likely that this kind of provision is playing a larger role in language learning, and may well be the basis on which persistent reports of buoyant demand are made.

It is mainly in the non-accredited area of language teaching that universities interact with the private sector. On the one hand, there is a small but flourishing business languages provision, in which university language units, often language centres, provide languages for external customers, at commercial rates. These are usually self-financing operations, and usually aim to cater for market segments that private language providers are unable or unwilling to enter. However, in some cases the university provider is in direct competition with private providers.

On the other hand, university students also make some use of external language providers. In some cases, the university has little knowledge of the transaction, having merely set a requirement that students achieve a certain level of language competence and making no specific provision itself. In a small number of cases, universities have franchised part of their language teaching requirement to an external supplier, though as yet most of these experiments have been short-lived. In recent years, at least one private education company was in negotiation with several universities to take over significant parts of language provision. In the event, no agreements were reached, but it is to be expected that similar discussions will recur in the future.

In some European countries, such as Greece, high quality private language provision is the dominant approach. In some others, such as Denmark, university students commonly use state-supported adult or further education provision for language learning. On the other hand, the recently introduced foreign language requirement for all Italian undergraduates is being met by a large investment in university language centres.

Part 3

Looking into the future

What will language education be like in 5 years time?

Looking into the future is a hazardous venture, but a necessary one if we wish to shape the society in which we live. In many respects, the future is already inscribed in the present. This is particularly visible in education where there are relatively long lead times for some kinds of change. For example, the effect of changes in primary school education will take at least seven or eight years to become noticeable in higher education. On a slightly shorter time frame, a new school curriculum or degree programmes required in three or four years' time will need to be initiated today.

Some kinds of change are more predictable than others. Changes in the earlier years of education work their way through the system with a given cohort. For example, the students who will enter university in five years time are already in secondary school and will shortly be making their choices for GCSE. On the other hand, there are types of change that are less predictable. The post-16 sector is to a large extent an area of choice, and higher education in particular is strongly market-driven. The result is that changes in demand in this area are more rapid and less predictable, although some of the factors contributing to change can already be identified. A topical example is the government's decision to remove languages from the core curriculum in England after the age of 14. It will certainly have an impact, though it is as yet too early to quantify it, and predictions range from a small decrease to a near-total collapse in language study at GCSE level, and beyond.

Looking only five years ahead, it is possible to make informed estimates of what language education may look like in 2007. Since all estimates are based on assumptions, we propose to offer two possible futures. The first will be a 'familiar future', based on the assumption that the main trends identified over the last five years will continue at about the same rate. The second will assume that the trends will accelerate, and will therefore produce a 'different future'. The purpose of painting these possible futures is to show the potential effects of current trends, and to identify issues that need to be addressed, whether in resisting, encouraging, or living with the changes that are afoot.

3.1   A familiar future

It is not difficult to project a future of gradual change, working from the assumption that current patterns will be sustained. In this case, we can already see where we are heading, and are in the familiar territory where 'this is what will happen if things carry on as they are'. Drawing the trends together, we can sketch a picture of language education post-16 five years hence, in which the different aspects are largely familiar, even if the overall picture may not be.

3.1.1 Extent of provision in 2007 – a familiar scene

Looking around in 2007, the scene is in many respects familiar. The primary languages initiative of 2003 is beginning to have an impact in schools but has not yet noticeably affected the secondary sector. Public attitudes towards language learning continue to be positive and national strategies in England and Wales have been joined by similar initiatives in Scotland and Northern Ireland. Developments in Europe and internationally continue to encourage language learning. As a result, the shift to voluntary languages post-14 in England only reduced the numbers taking GCSE by around 10% when it was introduced, and numbers have stabilised at around 500,000 in 2007. The modest recovery in Scottish Standard Grade entries has been sustained, and the numbers have reached around 60,000, nearly as many as in the bumper year of 1997. AS levels are now a well established feature of sixth form study and the number of students taking languages has dipped in line with GCSE to around 40,000, some 4.5% of AS entries. A significant proportion are taking their language course as a supplement to their main study.

The decline at A-level accelerated slightly as the changes at GCSE worked through the sixth form. However, the general drift away from specialising in languages has now slowed, and teachers are hoping the decline has now 'bottomed out'. The two most buoyant languages, Spanish and Chinese, have held their numbers, while the other languages have fallen by only a third over the last five years, less sharply than their previous decline of 8-10% per year. Numbers in 2007 are down to 24,000 from around 32,000 in 2002. Spanish still benefits from the cultural attraction of the Americas and it now accounts for around 5,500 students, noticeably ahead of German (4,500), though still some way behind French (10,000). Chinese has consolidated its position as the fourth largest language, reaching 1,800, as that country's international profile increases. Other less widely studied languages have, however, continued to decline. As the quantity of students has fallen, the quality of their results has risen. The proportion of A2 level students attaining grade A has continued to rise, to a third or more in French, German and Spanish, to half in Italian. As many as 85% get an A in Russian, though most entrants are from a Russian-speaking background. Four fifths of all language students now achieve at least a grade C.

In Scotland, the long and largely demographic decline in Highers was arrested in 2000 and has continued a very modest recovery to increase by 5% over 2002, reaching 8,600. Proportionally, a lot more Scottish students study a language to school leaving level than do their English or Welsh counterparts, thanks to their wider curriculum as well as their stronger sense of having a European identity.

University admissions to language degrees in 2007 have declined along with A levels, though slightly less rapidly, since an increased proportion of A level students now see themselves as specialists and plan to continue their language at university. Admissions have nonetheless fallen by a third overall since 2002 to less than 6000 students. Spanish and Chinese have held their numbers at almost the same level over the period. Accordingly, Spanish (1200) now admits almost as many students as French (1500), which has fallen by a third, as have German, Italian and Russian. The overall decline of language degrees is in the context of an overall expansion of higher education, and language degrees now account for around 1.5% of applications to all subjects. It is a buyer's market for applicants and significant numbers of students are waiting until they get their results before approaching the universities of their choice through the 'clearing' scheme.

Languages for all programmes in universities have continued to grow, albeit unevenly, as growing numbers of students want to supplement their main degree with a language option. The 4-5% annual increase in numbers studying a language has exceeded the 3% increase in total student numbers and in 2007 nearly 10% of all students are involved in some form of language study. However, most of the expansion has been in non-accredited provision, since numbers taking accredited modules have continued to fall almost at the same rate as language degrees. European languages are still the most popular, with French and Spanish now firmly the most popular choices, though Chinese and Japanese have gained ground.

The current position - actual figures for 2002

	GCSE	Scottish Standard	AS	A level	Scottish Highers	HE (2001)
Chinese	2,634	-	1,180	1,735	-	160
French	338,503	39,191	22,377	15,615	4,771	2,221
German	126,220	13,995	9,973	7,013	2,206	949
Italian	5,586	688	1,205	787	284	416
Russian	1,618	17	467	481	14	144
Spanish	58,011	3,031	7,787	5,573	915	1,225
Other languages*	18,304	200	2,933	1,847	-	2,927
Total	**550,876**	**57,122**	**45,922**	**33,051**	**8,190**	**8,042**

A familiar future - possible figures for 2007

	GCSE	Scottish Standard	AS	A level	Scottish Highers	HE
Chinese	2,371	-	1,062	1,735	-	152
French	304,653	41,151	20,139	10,150	5,010	1,466
German	113,598	14,695	8,976	4,558	2,316	626
Italian	5,027	722	1,085	512	298	275
Russian	1,456	18	420	313	15	95
Spanish	52,210	3,183	7,008	5,573	961	1,164
Other languages*	18,844	210	2,640	1,201	-	1,932
Total	**495,788**	**59,978**	**40,268**	**24,041**	**8,600**	**5,709**

** For HE figures, this includes combinations of the above languages reported to UCAS as T9 subjects in addition to less widely studied languages.

Source: 2002 figures taken from other tables within this report.

3.1.2 Structure of provision in 2007 – a less familiar scene

Changes in student choices have produced a pattern of education that is rather less familiar. The structure of language provision has become much more differentiated. All schools still offer languages as an option at GCSE, and most sixth forms offer an AS level course, since many students see languages as a key skill adding value to their studies, rather than an academic subject in its own right. The shortage of specialist language teachers has been partly alleviated by a combination of fewer students, especially at A level, by increased recruitment of foreign nationals and by a greater use of independent learning approaches, now supported extensively with good online resources that are easily accessible to all students. But problems persist with the falling number of languages graduates available to go into teacher training, and with competing demands from the primary sector, where take up of languages is increasing. A significant amount of informal language learning is also taking place outside formal class time, at lunchtimes and in the evenings.

On the other hand, A level (A2) languages are now becoming the province of the academic and social elite. Still very much part of the curriculum in the independent sector, they are not offered in all state sixth forms, and have become focused in a smaller number of schools. It has become common in many areas for consortia of schools to combine efforts to support A level classes in their locality, sometimes in co-operation with a local university.

In higher education, the number of departments offering language degrees has continued to decline. These degrees are now offered by around fifty universities, one or two of which are in the post-1992 sector. Many degrees became unviable in the mid 2000's as relatively large graduating cohorts were replaced by much smaller first year cohorts, and the diminished student numbers were no longer able to sustain full degree programmes. The tendency for students to concentrate in a small number of universities has continued. Half a dozen universities have emerged as the leading providers, and twenty universities now teach three quarters of students on languages degrees between them. French and Spanish are offered by all degree providers, most of whom also offer German. Italian is offered at degree level in a much smaller number of institutions. Degrees in Russian, Chinese and other less widely studied languages are confined to a handful of universities. Single Honours degrees are still offered in a small number of places, but the norm is combined degrees. Most languages departments are now part of larger merged units, often within a business school or within a broad arts and humanities grouping. In many cases, research active languages staff have been dispersed to groups in cognate disciplines, especially business studies, English or comparative literature, history, politics and education. A growing number of degrees in languages are compiled from modules in various departments, grouped around a core of language learning.

Conversely, language centres are expanding to keep up with demand for language courses. Encouraged by government, most universities now see these operations as adding value to degrees in a wider range of disciplines, and supporting the growing international orientation of UK higher education. In some cases, language centres maintain a productive relationship with language degrees, benefiting from flexibility and cooperation. But more often than not, they are independent units specialising in language learning for a wide range of students, and increasingly dependent on central funding since most of their students are studying outside their degree curriculum. A growing number of language centres are achieving adequate funding to provide a professional service, especially where they are offering successful English language programmes aimed at non-UK students. Some are still struggling in precarious conditions, though, especially where senior university management is less supportive, and some universities still use language centre courses to cross-subsidise struggling language degree programmes. In several places, institutions have pooled their resources or outsourced provision to other agencies. Language centres are increasingly becoming hubs in cross-sector consortia and playing an important role in languages for business and for their local community. The most successful of them are also generating more research activities in the area of languages.

3.2   A different future

Some features of the familiar future outlined above will be present in almost any projection. Even there, it is clear that gradual changes are likely to produce step changes, as the extent of provision impacts on the structure of provision. There are key thresholds in provision, such as the point at which a programme is no longer viable and is discontinued, the point at which a major language becomes a 'less widely taught language', or vice versa, or the point at which student numbers are spread so thinly that an entire sector moves to restructure provision. However, gradual change is not inevitable, and it is likely that some of the trends identified will accelerate. If they do so, the future might look distinctly different in 2007. The following picture is possible, and perhaps no less likely than the 'familiar future'.

A different future - possible figures for 2007

	GCSE	Scottish Standard	AS	A level	Scottish Highers	HE
Chinese	869	-	389	573	-	53
French	111,706	43,208	7,384	5,153	5,000	733
German	41,653	15,429	3,291	2,314	2,300	313
Italian	1,843	759	398	260	400	137
Russian	534	19	154	159	20	48
Spanish	19,144	3,342	2,570	1,839	1,200	404
Other languages*	6,910	221	968	610	-	966
Total	**182,658**	**62,977**	**15,154**	**10,907**	**8,920**	**2,654**

** For HE figures, this includes combinations of the above languages reported to UCAS as T9 subjects in addition to less widely studied languages.

Source: 2002 figures taken from other tables within this report.

3.2.1 Extent of provision in 2007 – a differentiated scene

Looking around in 2007, the scene has now changed dramatically. In the 16-19 sector, the 'black hole' in the post-compulsory study of languages has widened into a gulf. The decision of the government to take languages out of the compulsory core of the national curriculum at age 14 in England had the effect of reducing the numbers taking a language at GCSE by around 30% when it was introduced. Numbers continued to fall until the proportion of students taking a language reached a level comparable to Scotland and Wales, with roughly one third of students taking GCSE languages. The figures have now stabilised at around 180,000 in 2007. This has had an impact on AS levels, since markedly fewer students are entering sixth form with a sufficient level of language attainment to tackle them. Consequently, after their initial surge in Curriculum 2000, languages are now down to around 15,000, or some 1.5% of AS entries. The rapid decline of numbers in England has not been echoed in Scotland, where languages have held steady and even slightly increased as the impact of the primary languages initiative has worked through the system.

The decline at A-levels has accelerated, following GCSE and AS levels. All languages have been affected by the decline, and numbers in 2007 are down to 11,000, a third of their total in 2002.

University admissions to language degrees in 2007 have declined at the same rate as A levels, falling by two thirds since 2002 to around 2600 students. This decline is in the context of an overall expansion of higher education, and language degrees now account for rather less than 1% of applications to all subjects.

Languages for all programmes are now booming as growing numbers of students want to supplement their main degree with a language option. The increase in numbers has accelerated as larger numbers of UK students attempt to make up the language deficit they have suffered in school. Most of them, however, are studying their language outside their degree programme. (A more pessimistic view would follow from a projection in which languages for all programmes ceased to grow or declined during 2002-2007.)

A new landscape for languages

3.2.2 Structure of provision in 2007 – a differentiated scene

The different pattern of students' language learning has produced a highly differentiated structure of language provision in 2007. Many schools have difficulty meeting their obligation to offer languages as an option at GCSE, and many sixth forms do not offer an AS level course. There is no shortage of specialist language teachers, since student numbers have fallen so steeply, and a growing number of them work on a peripatetic basis. Many teachers have left to teach abroad or in the private sector language industries. Some have converted to primary teaching, where demand is growing. Most post-16 language teachers are involved in maintaining consortium provision, and facilitating informal language learning outside formal class time, at lunchtimes and in the evenings. The 'languages ladder' is now proving popular as a means of accrediting lower levels of achievement outside the main curriculum, and there is a flourishing economy of language tutors, summer schools and private language schools, as parents try to give their children better opportunities than most state schools can provide.

A level (A2) languages are now very much for the academic and social elite. They are concentrated in the independent sector and in specialist language colleges, though there is a small movement to introduce 'international' streams in some state schools. Beyond that, the residual A level candidates in state sixth forms are mainly taught by peripatetic teachers and through consortium arrangements between schools, usually combining efforts with other local providers.

In higher education, the dwindling numbers at A level have led many universities to withdraw from language degrees. These are now offered by around twenty 'old' universities, mostly in the elite Russell Group, though many institutions continue to offer degrees with a minor language component (often available ab initio). Only the half dozen leading providers offer languages other than French, German and Spanish at degree level, with accompanying cultural or social studies of the country concerned. Conversely, language centres are flourishing, and in many cases have taken over the 'minor' language provision in integrated programmes. Most of them are well funded and provide a highly professional service, including large English language programmes aimed at non-UK students. They are now usually a key hub in cross-sector consortia, offering a wide range of services for business and their local community, and some are emerging as centres of excellence for research in the area of languages. A small number of the more entrepreneurial language centres are offering services to other institutions, and in a couple of cases they have formed spin-off enterprises to market themselves more widely. Private sector companies have also begun to play a stronger role in providing languages for higher education, and some language centres are considering entering business partnerships with private providers.

(On the more pessimistic projection, language centres continue to struggle against precarious conditions. They lack the resources to overcome their dependence on casual staff, and while some of them play a role in offering business languages, they are caught in the general demoralisation of the discipline of languages. They are unable to attract support and investment from vice-chancellors, who are unwilling to back losers, and who are increasingly looking for ways of outsourcing their remaining language requirements.)

Part 4

What actions should be taken?

4.1   Responding to current changes and possible futures

The scenarios depicted in the preceding sections combine both utopian and dystopian elements. They suggest two kinds of challenge. The first is to frame actions that will strengthen those tendencies that produce more positive change, and counteract the negative tendencies. The second is to adapt successfully to new conditions that are arising. Negotiating a path between the two challenges is a difficult and complex task. The purpose of this concluding section is to identify some of the key issues that arise and to propose a number of steps to be taken. The recommendations are cast in broad terms, and it is hoped that they will inform a wider debate, in which the academic community and decision makers in a range of agencies will be able to identify the specific means of taking some or all of the proposals forward.

4.2   Rationales for studying languages

The market-led nature of post-16 education in the UK lays great emphasis on students choosing to study languages, and having clear reasons for their choice. The rationale for studying languages largely determines whether students will choose to study, what kind of courses they will follow, and how long they will be motivated to study. A number of different elements contribute to choice, but from the emerging patterns it is clear that **the most buoyant areas of languages are those that provide language skills supplementing other areas of study.** Language is valued as a means to an end, aiding study, adding valuable assets to future employment prospects, and providing a window on the world. Formal accreditation of competencies in community languages is also proving increasingly attractive to bilingual students. Conversely, there is a sharp decline in specialist study, in A levels and language degrees.

In some respects, this is a version of the conflict between academic and vocational education, where languages have increasingly come to be seen as a vocational subject, at least for young people who expect their future lives and careers to have a significant international dimension. There are two corollaries of this. First, young people with more restricted social horizons do not see a vocational advantage in languages, and the social base of language learning is narrowing. Second, many socially ambitious young people have a largely instrumental view of languages and do not perceive the value of languages in their own right, either as a challenging and stimulating object of study, or as the main focus of a career.

The challenge to educators is to articulate rationales for language study that will enhance the attraction of languages and lead to a wider social and academic profile. There are three basic questions to which we need to give students clear answers:

Why should I continue supplementary language study, when it is not compulsory?

Why should I specialise in a language as a subject in its own right?

Why should I consider a language-related career?

The full answers to these questions will be complex and interconnected, no doubt. They will be slightly different for particular languages or groups of languages. And they will need to be presented in ways that make sense to students from different academic and social backgrounds and at different stages of their studies.

The rationale needs to be supported by something in students' experience that enables it to carry conviction, such as the enjoyment of learning, the intellectual challenge, the sense of achievement, or the fascination of foreign ways of living. But unless there are clear reasons, the choice of studying languages will not make sense to students. A number of attempts have been made to present reasons, such as first section of the Nuffield Report, the Aston

'Languages for Life' project, and the information section of the Subject Centre's Languages Box. A systematic listing of reasons should be developed, to answer the three questions identified, and grouped to apply to a range of different student categories. It is recommended that ***rationales for studying languages should be collected and classified***, in wide consultation with providers and language professionals.

The results would contribute to two important activities. First, they would enhance efforts to influence public opinion. **Public attitudes are a major factor in the take-up of languages in the post-16 sectors**, and repeated initiatives and programmes have sought to influence them, often with clear success, as in the case of the Nuffield Languages Inquiry and the European Year of Languages. However, these and other approaches would benefit from clearer targeting of particular groups and from greater differentiation in the benefits emphasised. ***A strategy should be developed for informing public opinion on the reasons for studying languages***. It might, for example, be a major task for the proposed new National Director of Languages in England. But it will require the cooperation of a wide variety of agencies and initiatives across all parts of the UK.

Second, a systematic taxonomy of rationales would enable clearer objectives to be set for particular courses of study, and **clearer rationales would give a sharper focus to curriculum innovation**. This latter issue is discussed separately below.

4.3   Curriculum development

If the patterns identified in this study continue, there will be a growing need for new curricula to be developed to meet the changing needs of students. The increased differentiation of provision, whether or not it is actively managed, means that **it is urgent to ensure that curricula provide effective learning paths for students**, and that a curriculum designed for one purpose is not applied by default to a context for which it is inappropriate. The new learning ladder scheme, proposed in the language strategy for England, and linked to the Common European Framework for Languages, offers the prospect that a diversity of curricula could be given coherence at the level of accreditation. This could avert the worst disadvantages of divergent tendencies in curriculum development.

If a set of clear rationales is developed for studying a language, as recommended above, it will provide a valuable instrument for evaluating existing curricula and for devising new ones. Insofar as **students are better motivated to learn languages by a curriculum that addresses their needs**, it is likely that new curricula could alleviate the current decline in enrolments in specialist courses, and could improve the take up of supplementary language courses. In any event, there is vast expertise among language educators that can contribute to the work of curriculum innovation.

In respect of supplementary languages across the two sectors, there is an opportunity to consider greater cooperation in the development of the curriculum. In particular, there would be benefits from a curriculum framework that enabled students to progress explicitly in their language learning from school to university. Attention must also be paid to the role of community languages which are increasingly featuring within formal programmes of study. It is therefore recommended that ***a curriculum innovation initiative should be launched for supplementary languages across 16-19 and higher education***. This initiative might come from one of a number of sources, and would ideally involve partners from a number of agencies and providers. It might involve consultations at national and regional levels, and would be likely to require pilot studies to be carried out. In the first instance, it is recommended that ***a workshop should be organised to bring relevant parties together*** and discuss ways in which the initiative could be taken forward.

In respect of specialist study in languages at sixth form and university level, the curriculum is less amenable to a common approach, since the particular language and culture studied plays a more salient role in the curriculum at more advanced levels of study. The means of developing the A level and Scottish Highers curricula are significantly different from the processes by which language degrees are developed. Moreover, A levels/Highers are a school leaving as well as a university entrance qualification, and only a quarter of A level candidates currently proceed to language degrees. However, **since specialist study is currently experiencing sharp decline, it is probably most in need of curriculum innovation**.

A review of A level curricula would be valuable. Scottish Highers might also benefit from review. The recent improvement in student numbers taking a languages Higher suggests that there might be useful lessons to be drawn for A level. A review might seek to identify how far existing curricula correspond to the reasons underlying student choice, how far they meet the potentially divergent needs of school leaving and university entrance. More

broadly, a review might examine what role the current curricula have played in the decline in student candidatures, and what changes might attract more students. It should then examine how curriculum might be revised to correspond more closely to student needs. Accordingly, it is recommended that **the A level languages curriculum should be reviewed**. No doubt the Qualifications and Curriculum Authority would need to take the lead role in this process.

A review of specialist language degrees would also be valuable. These are now extremely diverse, though families of similar degree types are still identifiable. The curriculum of each degree is under the control of the university concerned, which is free to make whatever changes it deems desirable, though **quality assurance and benchmarking have had some effect of limiting diversity** in recent years. Diversity is also limited by a certain level of consensus and sharing of practice within the academic community, exemplified in the external examiner system. Nonetheless, **universities have innovated actively in language degrees**, in attempts to gain advantage, meet new demands or stem the decline in student applications. A review of curricula would be useful if it were able to identify how far the existing models correspond to the reasons underlying student choice, what role the current curricula have played in the decline in student admissions and what changes might attract more students. Accordingly, it is recommended that **a review of specialist language degree curricula should be carried out**. Possibly, it might be led by the LTSN Subject Centre for languages, linguistics and area studies, drawing on the expertise of heads of department, subject associations for the different languages, and others.

4.4   Addressing differentiation

A striking pattern to emerge from this study is the extent to which provision has become differentiated. **It is likely that differentiation will increase**. The shrinking numbers taking a language to school leaving level (especially A level) contrasts with the growing numbers studying a language as a supplementary subject. The structures that support this provision are also diverging significantly. In the 16-19 sector, specialist language provision is becoming concentrated on fewer schools, while non-specialist demand is met by a growth in consortium and peripatetic provision. In higher education, specialist language degrees are offered by a shrinking number of universities while non-specialist provision is expanding in language centres. In both sectors, **there has been a marked increase in provision on the margins of the mainstream curriculum**, in terms of time, location, accreditation arrangements, and outsourcing of tuition. Urgent consideration needs to be given to the implications of this differentiation.

On the one hand, there are evident risks. Academic elitism is already emerging as a consequence of specialist languages becoming concentrated increasingly in middle class schools and Russell Group universities. There is a clear danger that this may reinforce social elitism at a time when the drive to widen access to higher education is a leading national priority. And there are also dangers that the quality of language provision will be compromised for those without access to elite facilities.

On the other hand, differentiation offers evident benefits. The concentration of specialist provision may maintain high standards of teaching, albeit for fewer students. It may also enable greater attention to be given to the cultural content associated with languages. The diversification of non-specialist provision may offer the advantages of more focused tuition, tailored to student needs, and increased innovation and flexibility in approaches to language learning. Differentiation could also enhance social inclusion and wider access to language learning. This may be particularly relevant to the contexts of less widely studied languages and community languages.

Since these processes can be observed widely throughout the world, it is most unlikely that they will diminish in the near future, in the UK or elsewhere. It is therefore recommended that **the differentiation of provision should be embraced and managed**. If it is not embraced, the benefits will not be sufficiently achieved. And if it is not managed, the risks will not be sufficiently averted.

The means of managing differentiation lie with the state and its agencies, including regional agencies, as well as with the managers of schools, colleges and universities. However, the ways in which it can be managed will depend on the expertise and experience of teaching and support staff. Consequently, the process of addressing differentiation will need to be consultative and iterative. It is therefore recommended that **a series of working groups should be set up to make detailed recommendations on how differentiation in language provision should be managed**. These groups should ideally be set up in each of England, Scotland, Wales and Northern Ireland, and should involve both practitioners and policy makers. There may need to be separate groups for 16-19 and higher education, set up by the appropriate state body responsible.

4.5   Collaboration between sectors

It has become clear in this study that many of the patterns in language provision are common to the later years of secondary school and higher education. Changes in one sector have significant repercussions for the other, and in many cases **effective responses to current issues in languages need to be developed across the sectors**. There is clearly a need for more sustained reflection by policy makers on the provision of languages in the entire post-16 area, perhaps including post-14 compulsory education. The present organisation of UK education does not facilitate such a broad view, but it may well be possible to begin the process by considering forms of qualification and accreditation that would provide some continuity between them. The proposals in the language strategy for England for a new framework of qualifications, a learning ladder, could be implemented in a way that provides a coherent focus for supplementary language learning across sectors. It is therefore recommended that *steps should be taken to implement the proposed new system of language certification in a form that can be used for both upper secondary and higher education*, with the aim of providing continuity of progression in language learning post-14.

The strategy for languages in England proposes a number of initiatives in which collaboration between schools and universities will specifically be encouraged. The same approach is echoed in the government White Papers for higher education and for 14-19 education. Partnership is a key theme of the language strategy, aimed at promoting language learning by spreading good practice and increasing the overall impact of language learning. It is also a means of breaking down barriers between sectors, reducing the isolation of some schools, and sharing facilities. There is emphasis on regional developments, which are likely to build on existing arrangements, including Comenius Centres, and the Regional Languages Networks, currently being developed by the Languages National Training Organisation (LNTO). There are also plans for a series of new Virtual Language Communities, based on greater use of technological and e-learning approaches to language learning.

Until recently, **dialogue between the two sectors was very limited, but this has begun to change** both at the level of representative organisations and at the level of local contacts. There is a growing recognition of the benefits of collaboration, and at present there is much goodwill as well as a measure of enlightened self-interest. Organisations representing academic staff in both sectors have initiated a process of formalising their cooperation, and it is to be hoped that this will lead to a number of tangible initiatives as well as improved understanding. Similarly, contacts at local level have developed significantly, and the proposals in the language strategy for England will give them greater momentum.

However, **if cooperation is to be sustained, it must be based on long-term structures and resources**. Institutional structures are needed to make cooperation a regular dimension of activity for practitioners in both sectors, while identified resources are needed to help prevent it being squeezed out by competing priorities. This might take a number of forms, some of which will undoubtedly be developed from government strategy proposals for higher and further education. In the case of languages, it would be valuable for specific provisions to strengthen support for learning and teaching across the two sectors. These will no doubt need to wait upon the outcome of current restructuring in both sectors. In the meantime it is recommended that *increased collaboration between 16-19 and higher education in languages should be actively encouraged through institutional structures and identified resources*.

4.6   Collaboration between institutions

There is a small but growing amount of collaboration between institutions within the same sector in providing education in languages. This has been encouraged by initiatives in both 16-19 and higher education. There is some experience in developing consortia of schools to share language provision and the signs are that this is likely to increase. The initial results of pilot schemes in higher education have been encouraging, and the example of some other countries, such as Australia, suggests that **inter-institutional collaboration can be a key factor in maintaining diversity of provision**, especially in subjects of low enrolment. However, it is not an easy option, both because of logistical difficulties and because of the underlying competition that exists between institutions. If it is to play a significant role in supporting language learning and maintaining diversity, a good deal more experience needs to be gained. It is therefore recommended that *a further series of pilot projects should be funded for collaboration between higher education institutions in language provision*. The key aim of the projects should be to improve provision in languages of smaller enrolment, and to maintain the breadth of curriculum in larger languages. The projects should therefore cover both language learning and the study of cultures and societies. Similar projects may be required in the 16-19 sector.

4.7   Teacher supply

The current shortage of qualified language teachers in the UK is a recurrent preoccupation of the government and school authorities. The decision to make languages voluntary in England after the age of fourteen may have been in part influenced by the shortage, and as our future scenarios suggest, the resulting decline in pupil numbers may alleviate it. The Teacher Training Agency is also energetically seeking to increase recruitment of trainee teachers, with some success. However, **a key underlying cause of the teacher shortage is the sharp drop in the number of language specialists produced by universities** over the last ten years. Moreover, the drop in student numbers has been most severe in the post-1992 universities, who traditionally sent a larger proportion of their students on to teacher training. The shortage of specialised sixth form teachers may even further reduce the numbers of students who apply to study language degrees, and that could be exacerbated by the increased demand for language teachers in the primary sector.

There are several other factors affecting teacher supply, no doubt, but one way the shortage might be combatted is for specialist language courses to be developed with a stronger orientation towards a future teaching career. Something of this kind is already implied in the language strategy for England, but it may be useful to encourage more universities to develop curriculum content and marketing strategies that target potential teachers. This is not an easy or assured solution since it is not certain that such degrees would prove attractive to sufficient numbers of students. However, it is a route that might find a niche among applicants, and might go some way to countering the incipient elitism associated with language degrees. In exploring this option, it will be useful to examine existing degrees that already have this orientation in the UK. It will also be useful to examine the experience of other European countries, since in many countries language degrees primarily serve as a route into teaching. The work of the Socrates Thematic Network in Languages casts some light on the issues. It is therefore recommended that **the potential of language degrees with a curriculum oriented towards teaching should be explored**. This might be carried out by an individual, a small working party, or a consultative event. In any case, the process will need to draw on expertise from institutions and agencies in both 16-19 and higher education sectors, including teacher training.

4.8   The impact of resource allocation

In both sectors of education, one of the most significant factors in the success or otherwise of languages programmes is the method of allocating resources for staffing and infrastructure. In higher education, there are several methods for allocating funds at national level, differing from one part of the UK to another. Resources are distributed broadly in relation to the number of students and the funding category or 'band' to which the subject belongs. Every institution then operates its own combination of methods in running its internal economy. Teaching groups receive funds in the form of an allocation decided by central management, or by a formula based on the numbers of students taught. Alternatively, allocations may be determined through negotiation between departments, or students may be charged directly (for example in extra-curricular classes). **The form of resource allocation creates an environment that may favour or discourage the study of languages**. The allocation model may determine, for example, whether a particular class or course is considered economically viable, whether other academic departments will encourage students to study a language, and how far senior managers can intervene to support or curtail language studies. It is a common experience that internal economies favour courses with large and relatively homogeneous groups of students, and discourage small and diverse groups. This is often a difficulty for language learning, which typically requires small teaching groups, and in which less widely taught languages attract relatively small enrolments. To some extent the same issues are also present in 16-19 education, and are perhaps dramatised by the existence of specialist language colleges, where additional resources are specifically allocated to support language learning.

Subject associations have been active in seeking to improve funding for languages at national level, and have secured some successes, as well as raising the issue in the media. However, it has proved more difficult to address issues relating to the internal economy of institutions. Some associations have conducted useful staff development activities to assist heads of languages units in understanding and using internal structures. However, there is a need for more systematic work on this. It is therefore recommended that **an expert study of internal resource allocation models should be carried out**, with the aim of identifying key factors that affect the success of language programmes, and of providing informative support for language programme managers. There may need to be a separate study for each of the two sectors.

4.9   Deschooling

It has been a finding of this study that there is a growing tendency for languages to be provided on the margins of the mainstream curriculum in schools, colleges and universities. Language learning may be marginal in the amount of teaching time allocated, in being timetabled outside the main teaching hours, and in being located in less well suited premises. It may also be marginal in terms of accreditation arrangements and staffing provision. Marginal provision offers language learning opportunities that would otherwise not be available. But it is often available under less desirable conditions than apply to mainstream curriculum teaching. Its extent is not well documented, and there is little material or advice directed towards supporting it. It is therefore recommended that *language learning on the margins of mainstream school and university provision should be more fully studied*, with a view to mapping its extent and leading to advice, learning materials and examples of effective provision.

There also appears to be an increase in the numbers of students seeking to improve their language proficiency but unable to find provision within the institution where they are studying. If these trends continue, it is likely that **the deschooling of languages will accelerate**. In the UK and in most other countries, the private sector in languages currently makes major provision for adult learning and for industrial training, but provides only a marginal supplementation for students in full time study. There is evidence that its role in state education may be increasing. It is therefore recommended that *the role of private sector language provision in supplementing state education should be more fully studied*, in order to assess its extent, its structure, the benefits and disadvantages of any increased role, and the regulatory framework within which it does or should operate.

4.10   International developments

In identifying past changes, it is clear that the extent and structure of provision is following similar patterns across the world. Inevitably, there are national differences, but **the UK is not alone in facing difficulties with language strategy**, and the pace of convergence appears to be quickening. Some of the potential solutions may already be in place in other countries, and certainly there is widespread discussion of the issues. It is desirable that in the search for local solutions, UK providers and policy makers should learn from the experience of other countries.

In most countries there is a sharper distinction between secondary and higher education, especially in language education, and in preparing this report it has become clear that information on language learning in higher education is much less robust and systematic than for earlier stages of education, in most of the countries examined. There are few sources where information from several countries is gathered together or analysed comparatively. At the same time there is growing interaction between policy-makers and between providers internationally, especially within Europe. It is therefore recommended that *an international Languages Observatory should be established to collect and disseminate information about international developments in language learning, in higher education*. There are several routes through which this could be achieved, and it may be that a consortium of agencies might contribute to it, perhaps at a European level or on a wider international basis.

1   Rationales for studying languages should be collected and classified.

2   A strategy should be developed for informing public opinion on the reasons for studying languages.

3   A curriculum innovation initiative should be launched for supplementary languages across 16-19 and higher education. A workshop should be organised to bring relevant parties together.

4   The A level curriculum should be reviewed.

5   A review of specialist language degree curricula should be carried out.

6   The differentiation of provision should be embraced and managed. A series of working groups should be set up to make detailed recommendations on how differentiation in language provision should be managed.

7   Steps should be taken to implement the proposed new system of language certification in a form that can be used for both upper secondary and higher education.

8   Increased collaboration between 16-19 and higher education in languages should be actively encouraged through institutional structures and identified resources.

9   A further series of pilot projects should be funded for collaboration between higher education institutions in language provision.

10 The potential of language degrees with a curriculum oriented towards teaching should be explored.

11 An expert study of internal resource allocation models should be carried out.

12 Language learning on the margins of mainstream school and university provision should be more fully studied.

13 The role of private sector language provision in supplementing state education should be more fully studied.

14 An international Languages Observatory should be established to collect and disseminate information about international developments in language learning in higher education.

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Acknowledgements

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Notes to Introduction

1   *Guardian*, 5 November 2002.

2   Editorial *in the Glasgow Herald*, 7 November 2002.

Notes to Part 1

1   U K Heritage languages (Gaelic, Irish, Welsh) are not considered to be Foreign Languages for the purposes of this study. Accordingly, trends in those languages are not documented here.

2   SQA attributes this decrease directly to a decline in population as detailed in the annual reports and cohort records for 1997 and 1998, the date of the most significant decrease in the period.

3   Joanna McPake, Richard Johnstone, Lesley Low and Lindsay Lyall (1999). *Foreign Languages in the Upper Secondary School: A Study of the Causes of Decline.* Research report No. 91. SCRE.

4   Additional statistical information is available on the UCAS website: www.ucas.ac.uk.

5   See for example, "Survey of non-specialist language provision in Further and Higher Education institutions in the UK." TransLang (November 1997); UCML "Survey of Less Specialist Language Learning in UK Universities 1998-99." Keith Marshall, University of Wales, Bangor; South West of England Regional Development Agency Language Skills Capacity Audit 2001; and similar by North West and Advantage West Midlands RDAs.

6   Richard Towell. "Languages in Higher Education." *In Where are we going with languages?: The Consultative Report of the Nuffield Languages Inquiry.* A. Moys ed. Nuffield Foundation, 1998.

7   In a recent poll of language centres, 44 out of 47 universities reported that numbers were growing. Two were 'steady' and one was falling (Conference of the Association of University Language Centres, London School of Economics, January 2003)

8   These are Arabic, Modern Standard Chinese, French, German, Modern Greek, Indonesian/Malay, Italian, Japanese and Spanish as reported by a report to the Australian Research Council entitled *Languages and Literacy.: Australia's Fundamental Resource.* ARC 1998.

9   See for example: "Subjects of small enrolments in the humanities." (1996) A report to the Australian Academy of the Humanities; Anne Pauwels (2003) "The Situation of Languages in the University Sector at the start of the third millennium." Babel 37 (2): 16-20; and the Deans of Arts, Social Sciences and Humanities (DASSH) workshop on "Teaching and Research in University Language Programmes: Successful Practices, Creative Strategies" (June 2002).

10   Information from the DASSH Survey, 2001, provided by Anne Pauwels, U. Western Australia.

11   Jamie B. Draper and June H. Hicks (2002). "Language Enrollments in Public Secondary Schools, Fall 2000." American Council on the Teaching of Foreign Languages.

12   Richard Brod and Elizabeth B. Welles (Winter 2000). "Foreign Language Enrollments in United States Institutions of Higher Education, Fall 1998." *ADFL Bulletin* 31 (2): 22-29.

13   Richard Brod (October 2001). "A Forecast for Tertiary Foreign-Language Education in the United States." *Forum for Modern Language Studies* 37 (4): 368-38.

14   Ministère de l'Education Nationale. *Note d'Information* 01.37 and 02.39. See also M. Kelly, "The French lesson Britain cannot afford to ignore." *Parliamentary Brief*, November 2002, Education Special, p.11.

Notes to Part 2

1   Gordon Millan. *Modern Language provision across all HEI's:* a Survey (2002) Submission from Universities Council of Modern languages (Scotland) to Universities Scotland. November 2002.

2   Calculations are based on detailed figures from HESA.

3   This information is derived from the website of the Canadian Association of University Teachers of German. www.mun.ca/german/German/CAUTG/2001/.

4   This information is derived from annual datasets to be found on the UCAS website: www.ucas.ac.uk

5   Gordon Millan op. cit.

6   Richard Brod (October 2001). "A Forecast for Tertiary Foreign-Language Education in the United States." *Forum for Modern Language Studies* 37 (4): 368-38.

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A new landscape for languages is emerging. This study examines its contours and their implications for the future of language study. Further copies of this report can be obtained from: