



**Labour Market Intelligence for the Qualifications
Strategy for Foreign Languages and
Intercultural Skills**

CILT, the National Centre for Languages

June 2008

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Executive summary

Language and intercultural skills

Language and intercultural skills do not form a sector, but they are essential skills across all industrial or commercial activities. Language and intercultural skills also form an important or an advantageous component of the overall skills make-up of a wide range of occupations and the language service industry adds value to all sectors. In this regard they are cross-sector skills.

National language strategies were produced for England and Wales in 2002 and in Scotland in 2007. In Northern Ireland a review of language skill needs has been commissioned and is due to be published later in 2008. All the language strategies stressed the importance to the economy of foreign language ability.

Competitiveness and productivity

UK Government policy has consistently sought to achieve further expansion of world trade and continuing reductions in trade barriers on the understanding that an openness to trade can play an important role in raising the long-run sustainable rate of productivity growth in the economy.

There is a large body of evidence that recognises that languages play a fundamental role in facilitating international trade. Although communication in the language of our trading partners is an important factor in supporting a trading advantage, the UK is bottom of the European league table in terms of competence in other languages.

There is some evidence that large and multinational companies in the UK have better developed language capacity than SMEs (although they did not always compare well with their continental counterparts). Research also suggests that underinvestment in overcoming the language barrier to exporting may be particularly marked for smaller firms.

If the UK government is to properly equip the UK economy to benefit from the anticipated expansion in future world trade then the evidence suggests that there would be large returns to the UK economy from effective intervention to improve language skills available to potential exporters within SMEs. It therefore follows that intervention to improve the competitiveness of the UK in relation to language skills should be targeted towards SMEs in order that they can both see and exploit market opportunities for international trade.

Language and intercultural skills needs

The Nuffield report in 2000 clearly indicated that UK business held a complacent view of the importance of languages based on the position of English as the world's business language and that the UK needed to dramatically develop its capability in language skills if it was to continue to be successful in the global economy. Since the publication of the Nuffield report a number of studies have also pointed to different aspects of the UK's deficit in the use of languages and intercultural skills by business.

Surveys have demonstrated that UK business performs relatively poorly compared to their European counterparts in respect of language strategies, acquiring staff with language skills, employing external language professionals, developing their websites and contemplating new markets. A range of such latent skills gaps and shortages in relation to foreign languages are interfering with business transactions and leading to loss of business.

Although the Leitch review of skills set out the challenge faced by the UK if it is to develop a world class skills profile and respond effectively to globalisation, it gave no explicit recognition that improved language and intercultural skills are fundamental to the success of UK plc in competitive international markets. In Europe it is increasingly recognised at national government level, and by the European Commission, that "English is not enough", not just for the UK, but for Ireland and for countries such as Denmark and Poland.

The Regional Language Skills Audits highlighted the dramatic impact of language skills shortages and gaps on actual or potential loss of business within different regions and nations of the UK. What is clear from the research conducted in relation to SMEs is that:

- Exporting SMEs would be more successful if they made greater and more planned use of language skills.
- By definition, SMEs lack the resource base of large enterprises and are thus less able to engage in capacity building activity where return on investment may be uncertain both in timescale and value.
- Interventions are desirable on the part of business support agencies to maximise opportunities, promote good practice and co-ordinate initiatives.

Given government policy and the large body of evidence that recognises that languages play a fundamental role in facilitating international trade it is therefore a matter of concern that there continues to be market failure of the UK in relation to language skills, which is very substantial and represents a huge barrier to trade (equivalent to about 5% of all British trade).

All the evidence available suggests that there would be large returns to the UK economy from effective intervention to improve language skills within SMEs.

Factors that influence progress in trading with non English speaking countries

The research that focussed on good practice amongst employers has revealed a range of factors that influence their progress in trading with non English speaking countries.

Approaches to language capability

Businesses use many different ways to carry out their business in non English speaking countries. These include: use of agents/distributors; partnerships with native businesses; foreign students on work placement; training existing staff; and, recruitment of bi-lingual or multilingual staff.

Many businesses have used external help, for example: UK Trade and Industry Export Communication Review Service; the original BLIS database of professional language service providers and subsequent regional databases; and the National and Regional Language Network services.

Current and future language skill needs

The employer preference in general, is for evidence of the ability to use a language (and even better, have experience of living within the culture) rather than simply a qualification in a language. Foreign language ability is valued by many employers, even where it is not essential to the job.

Many businesses review recruitment procedures to bring in language skills when recruiting new staff. In some businesses, language skills are ranked more highly than technical skills. Retention is also an issue, and premiums are often paid for language skills.

While skills gaps are not necessarily perceived, many employers have difficulty in filling positions requiring language skills.

Employers see an increasing need for language skills, due to globalisation, business development and the need to be able to compete effectively.

Investment in language skills

It can be difficult to quantify the benefits of investing in language skills, but the employers feel that it makes a positive difference to their organisation, whether they have use of those skills in the immediate future or not.

Businesses in the case studies invariably report significant and measurable benefit to their trading figures, and being able to use the language of the country is key to winning new and repeat business. In addition to this they see great benefits in their relations with clients and customers simply because they can communicate in their own language, and issues can also be dealt with more quickly.

Internally some businesses have seen the development of language capability leading to better relations between colleagues and new opportunities for staff.

There is a relatively high cost to investing in language and intercultural skills.

Intercultural skills

The articulation of needs, shortages and gaps in intercultural skills is often confused with 'language' or 'foreign language skills'. However, it is apparent that employers are increasingly demanding a wider degree of cultural understanding in response to the challenges of operating in an increasingly-integrated Europe and a globalising business environment.

It is not untypical for businesses to begin export trading in English speaking countries, during which they begin to appreciate the importance of cultural differences and the need to take account of them. When it comes to exporting to non English speaking countries the importance of language coupled with culture is readily accepted as crucial to export success.

The need to manage multilingual/multicultural workforce has also been a challenge to many employers as a result of recent immigrant and migrant workers mainly from Eastern Europe but also from further afield. Existing managers and supervisors needed the additional skills of intercultural working whilst highly valued immigrant workers would, employers felt; integrate more easily into the work and social community if they acquired some intercultural skills. Whilst the multilingual make-up of the UK's workforce represents a management challenge it also clearly represents a significant opportunity for the UK in terms of language capability.

The realisation of the importance of intercultural skills has not, in many cases, yet been translated into utilising training provision. It is more often preferred that employees will already be able to demonstrate evidence of having acquired these skills previously, such as through having spent time living abroad as part of a university degree.

The supply of language skills

Language Learning in Higher Education

The analysis undertaken has revealed a considerable decline in HE language learning in recent years. Data from 2002/3 to 2005/6 highlights a 6.2% overall decrease in first-degree language undergraduates. This compares with a 9% increase in total HE first-degree students across all subjects. Over this period decreases in enrolments are evident in French, German, Italian, Scandinavian studies, Russian and Eastern European studies and other European languages. However, in relation to Spanish and Portuguese, numbers increased.

By contrast 'other' undergraduate language enrolments at UK Universities increased over the period 2002/03 to 2005/06 by 2,370, or +10.6%.

Recent postgraduate numbers of language students are rising, largely due to an increase in overseas postgraduate students. However, UK domiciled postgraduate numbers are fluctuating. There are marked differences in these trends evident by language subject with declines in enrolments evident in relation to French, German, Japanese and South Asian Studies and increases in postgraduate enrolments in relation to 'other' Asian studies, African studies, Modern Middle Eastern studies and 'Other' European languages.

Language learning in Further Education

There are many positive opportunities to develop languages in line with the needs of employers and in combination with sector-specific skills with the changing nature of post-14 Education. However the FE survey undertaken by CILT demonstrates a serious erosion of the languages infrastructure in the FE sector:

- Fewer than half (44%) of the FE colleges offer opportunities to learn languages alongside vocational courses
- More than a quarter (27%) of those offering vocationally related languages courses has reduced this provision
- Of the colleges that do not currently offer vocational language provision, just over a third (36%) did so in the past

- Nearly half (42%) felt that student numbers would fall in the following academic year, while just under a third (32%) thought they would increase

Language learning in secondary education

The decision to make modern languages an optional subject at 14+ created an immediate and drastic drop in the number of pupils continuing with a language and this, in turn, was reflected in a decline in the Modern Foreign Languages offer at secondary level as schools rationalised provision in face of falling demand.

- In England, 78% of all pupils were taking a language in 2001, 68% in 2004, 59% in 2005, 51% in 2006 and then the recent drop to 46% in 2007.
- In Wales, the proportion of 15 year olds entering at least one language GCSE in Wales has fallen from 46 per cent in 1996 to 30 percent in 2006.

In both nations, decreases in those taking French and German account for the majority of the overall decline.

In Scotland there has been an overall decrease of just over 12,000 such students or –62% of students sitting standard grade foreign languages in Scotland over the period 1999-2007. Although there have been increases in numbers undertaking Intermediate 1 and 2 level entries these increases only partially offset the substantial decreases in those qualifying at SCQF levels 3 to 5.

In relation to A2 level language entries, over the period 1996-2007 total A2 level language entries for 16-18 year olds in schools and colleges across England fell by about 28%, although there have been very marked variations in these trends by different languages. Significant decreases in A level entries in modern foreign languages were also evident in Wales over the period 1992 to 2006 (by about 24%).

AS level exams were introduced in the academic year 2000/01. Total language entries for AS level decreased from 2002 to 2004 in England, but since then there has been a slow rise in total numbers. In Wales the number of AS entries in modern foreign languages by 16 year olds has increased from 990 in 2001 to 1,200 in 2006 (an increase of about 21%).

In Scotland, increases in numbers sitting both Higher Grade foreign languages (21%) and Higher Advanced foreign languages over the period 2000-2007 (71%).

Provider views

The nature of delivery

The key trend in relation to both language skills and intercultural training provision for employers appears to be the flexibility of delivery. This appears to be crucially important to effective provision. Language and intercultural skills courses are increasingly bespoke, catering to the needs of the individual employer. Providers often face a challenge in trying to respond to these needs.

Providers highlight a lack of language and intercultural skills strategy on the part of UK businesses, in contrast to their foreign counterparts. Provision is highly reactive to the short-term needs of employers.

Demand for language provision

The most important change in the demand for foreign language provision has been a lack of take-up from UK students. Many providers have experienced a decline in numbers in recent years, and this appears to be a common problem across the board. Neither the government, through the education system, nor local authorities were seen to show a 'real commitment' to language training.

Significantly, it was thought that the lack of UK interest in languages and intercultural skills could become a problem for UK businesses. It was suggested that UK organisations are losing their competitive edge, and often only operate in English-speaking nations due to the language barrier.

Overwhelmingly, funding appears to be the biggest issue in relation to future provision. In the future, providers see language provision becoming more expensive, placing language courses in further jeopardy.

Demand for intercultural skills provision

By contrast, intercultural skills provision appears to be enjoying an increase in popularity.

Globalisation appears to be the key driver of this demand. There is a sense that investment in intercultural training is increasing along with investment across borders. In particular, an interest in China has been a major shift. Companies setting up abroad in emerging markets, such as China and India, have a new need for a level of cultural awareness. The increasing popularity of intercultural training has also been linked with increasing cultural diversity within the UK. Because of these factors, providers thought that in the next few years the intercultural skill training sector will continue to grow.

Again, training provision for intercultural skills appears to be highly reactive and bespoke to each employer.

One important issue in the nature of current demand for intercultural skills training is that providers feel that the impetus is coming from abroad. Several providers noted that employers that take up intercultural skills training tend to be those with a European dimension or outlook, while many individual learners have foreign backgrounds. It was said that "*British students tend to be in a minority*", and while demand is growing, most of this interest has come from outside the UK.

Accreditation and qualifications

It appears that to most employers, accreditation of languages and intercultural skills courses are not important at all. There appears to be very little demand for qualifications. While some providers noted that some employers are keen to take up courses with qualifications, many employers seem to be interested only in having their needs met with minimal disruption to the working week.

Indeed, there is an overwhelming sense that employers lack a clear long-term training plan for language and intercultural skills and are simply looking for 'quick fix' solutions.

1. Introduction

1.1. Background

The main purpose of this report is to set out the results of a comprehensive research programme, which has sought to develop labour market intelligence in relation to language and intercultural skills.

The research has been commissioned by CILT, the National Centre for Languages, working in conjunction with GoSkills¹, in order to inform the development of a qualifications strategy for languages and intercultural skills.

The research has been funded by the Sector Skills Development Agency (SSDA)² which is responsible for the development of what is known as a Sector Qualifications Reform Programme (SQRP), which is part of a broad reaching initiative to radically change the landscape of vocational qualifications in the UK. The aim of the SQRP is to ensure that the qualifications and other learning programmes available across the UK are more effective in equipping people with the skills that employers want and that learners need to secure and maintain employment.

A sector qualifications strategy (SQS) is a planning tool, based on robust research, which incorporates a review and analysis of current qualifications and other learning provision in a sector, as well as identifying the vision for the future. An SQS also includes an action plan for achieving that vision. Each sector's SQS will be regularly updated to reflect the specific needs of that sector.

As part of the SQRP the SSDA has set clear standards for the research that they require to be undertaken in order to underpin a qualifications strategy. This is largely based on the guidance provided by the SSDA in relation to Stages 1, 2 and 3 of the sector skills agreement (SSA) process³. These stages involve:

- (i) A sophisticated assessment of each sector to determine short, medium and long-term skills needs and to map out the factors driving change in the sector (the demand for skills).
- (ii) A review of current learning provision across all levels to measure its range, nature and employer relevance (the supply of skills).
- (iii) Identification, analysis and prioritisation of the main gaps and weaknesses in workforce development (gap analysis).

¹ CILT is a standards setting body (SSB) working in partnership with GoSkills within the Skills for Business Network (SfBN). GoSkills is one of 25 employer-led sector skills councils within the SfBN, which have been created to address key skills issues within different sectors of the UK economy. GoSkills is the sector skills council for the passenger transport sector.

² It should be noted that the UK Government and Devolved Administrations in Scotland, Wales and Northern Ireland have announced the creation of the UK Commission for Employment and Skills from April 2008. The Commission, a key recommendation in Lord Leitch's 2006 review of skills, will incorporate many of the roles of the Sector Skills Development Agency and National Employment Panel which will both close on 31 March 2008. The Commission also replaces the Skills Alliance in England which has already been disbanded.

³ The sector skills agreement is the key mechanism by which sector skills councils identify and articulate how their sector is going to raise its productivity and performance.

The process is fundamentally about determining sector priorities and targets with its employers and partners to address four key goals:

- Reducing skills gaps and shortages.
- Improving productivity, organisation and public service performance.
- Increasing opportunities to boost the skills and productivity of everyone in the sector's workforce, including action on equal opportunities.
- Improving learning supply, including apprenticeships, higher education and national occupational standards.

Whilst CILT is not pursuing the development of a sector skills agreement, it is seeking to carry out a thorough assessment of labour market information relating to foreign languages and intercultural skills and fully meet the requirements and standards of the Sector Skills Development Agency for organisations wishing to pursue the development of a qualifications strategy⁴.

1.2. Organisational structures

1.2.1. CILT, the National Centre for Languages

A key part of the business-facing response to the Nuffield Inquiry⁵ was the Government's decision to amalgamate the Languages National Training Organisation (LNTO) and the Centre for Information on Language Teaching and Research (CILT) to form CILT, the National Centre for Languages.

The new organisation encapsulates the LNTO's role of Standards Setting Body and is formally charged with supporting the implementation of the ten year language strategy for England contained in Languages for All: Languages for Life⁶.

Prior to the merger, CILT Cymru was set up as a part of CILT and caters for Wales. CILT supported the establishment of Scottish CILT (SCILT), hosted by the University of Stirling, and Northern Ireland CILT (NICILT), hosted by Queen's University, Belfast. All four CILTs have an agreed Memorandum of Understanding and come together regularly as "CILT UK" to share information and expertise. Since 2003 the CILTs outside England have worked ever more closely with the national Language Networks (see below). Through direct action from these offices and UK liaison co-ordinated by the CILT in London, close involvement has been maintained in the development and implementation of policy on language and intercultural skills across the four countries of the UK.

This is of particular importance in respect of the Skills for Business Network, where the SSSA has a remit for the whole of the UK.

⁴ As a Standards Setting Body, CILT is not required to produce a Sector Skills Agreement (SSA), but is required to follow a similar labour market research process to Sector Skills Councils that are required to produce SSAs. Further information on SSAs can be obtained from the SSSA website at www.sssa.org.uk

⁵ The Nuffield Languages Inquiry, an independent inquiry funded by The Nuffield Foundation, was established in 1998. Its final report published in May 2000 serves as the blueprint to take forward language learning and capability into the 21st century.

⁶ Languages for All: Languages for Life, 2002 published by DfES. Further details on the strategy are contained in Chapter 2 of this report.

1.2.2. Regional and national Language Networks

The LNTO, with support from the then Department for Employment, and from Regional Development Agencies and autonomous administrations, established a network of outreach offices in the devolved national administrations within the UK and the English regions. These regional and national Language Networks, supported by CILT throughout the UK, work with Regional Development Agencies (RDAs), Sector Skills Councils (SSCs), business support agencies and employers at regional level to promote language and cultural skills specifically for business and employment.

Their role is to:

- work with partners to identify and address regional and sectoral needs for languages and cultural awareness;
- broker and/or provide support to employers on languages issues; and
- promote the services of languages industry professionals.

The development of these networks has proceeded at different speeds in the different regions and nations with core funding from the then DfES initially providing a half time Manager in each region. Managers have been appointed in all regions of the UK, in some cases working with a team funded by other stakeholders, such as Regional Development Agencies (RDAs), the UK Trade & Investment offices and Learning and Skills Councils within the regions, the Welsh Development Agency and key stakeholders in the other countries.

This financial commitment followed recommendations from Language Skills Capacity Audits⁷ and the recognition of the value of languages for a) developing the international communications skills – and therefore competitiveness - of exporting and internationalising companies; b) contributing to the regional “pull” factor for attracting and maintaining inward investment, and c) supporting greater effectiveness of working practices in an increasingly diverse existing and future workforce.

1.2.3. Languages Skills Alliance

The Language Skills Alliance is a partnership of CILT, the National Centre for Languages (CILT), the Standard Setting Body (SSB) for languages, *GoSkills*, the SSC for passenger transport and the Sector Skills Development Agency (SSDA). The Alliance was formed in November 2005 to work together with the Skills for Business Network (SfBN) to take forward a programme of work to raise awareness of the business benefits of languages and intercultural skills.

During the period covered by this report (November 2005 to March 2007) the key objectives of the Alliance were as follows:

- To support employers in identifying needs and solutions
- To influence the development of appropriate training and learning support provision
- To work together in developing and carrying out projects that are of benefit to employers throughout the UK economy
- To work together at region and nation level to influence key partners
- To disseminate information throughout the Skills for Business Network (SfBN) to enable all SSCs to better support employers in their sectors.

⁷ Between 2000 and 2004 a number of Language Skills Capacity Audits were carried out for RDAs and Devolved Administrations in the UK

In addition, the Alliance aimed to build on the work concluded during this period under the Languages Plan, a project led by ConstructionSkills on behalf of the SfBN⁸. This made specific recommendations for CILT, SSDA, SSCs and for the Language Skills Alliance in particular.

Since the introduction of Sector Skills Councils CILT has worked either nationally or regionally with twelve SSCs on LMI or skills development projects for languages or intercultural communication skills. All SSCs have at some stage been involved in consultation exercises relating either to language or intercultural skills.

1.2.4. Comenius Network

CILT has for over 10 years operated a suite of regionalised support services for language teaching practitioners, focused on the specific phase of education (e.g. Primary) in each instance. The longest-standing and most comprehensive of these is the network of Comenius Centres. In 2004 the Comenius Network was reconfigured to accommodate RDA boundaries, and as the RLNs became established, RLNs and Comenius targeted specific areas for collaborative action regionally and locally, most particularly concerning work experience for students of languages aged 14+, under CILT's DCSF-funded *Business Language Champions*⁹ programme, and language-specific careers information, advice and guidance under CILT's DCSF-funded *Languages:Work*¹⁰ programme. CILT Cymru grew from the original CILT Comenius Centre in Wales. Outreach support of a similar nature is provided by SCILT and NICILT.

1.2.5 Routes into Languages (England only)

CILT worked with the Subject Centre for Modern Languages, Linguistics and Area Studies, and the University Council for Modern Languages to secure 3-year funding from the Higher Education Funding Council for England for *the Routes into Languages*¹¹ programme, initiated in Autumn 2007. Following the Dearing Review, DCSF committed funding to boost the programme and allow full national coverage from the outset. The programme's aim is to widen participation in languages in Higher Education and to increase numbers of students taking languages in Higher Education. An explicit by-product is greater collaboration between universities, and between universities and other stakeholders. The programme has three elements: 3 1-year research projects (completed), two National Networks (Translation, Interpreting) and 9 Regional Consortia, each hosted by a university. Each of the nine Regional Consortia is working closely with its Regional Language Network, and the latter will continue to focus on promoting language skills for business and employment purposes.

1.3. The languages and intercultural skills sector footprint

1.3.1. Overview

Languages are a lifelong skill – to be used in business and for pleasure, to open up avenues of communication and exploration, and to promote, encourage and instill a broader cultural understanding.

⁸ For details of the Languages Plan project, see www.cilt.org.uk/employment/sfbn/languages_plan.htm.

⁹ <http://www.cilt.org.uk/employment/blc/index.htm>

¹⁰ <http://www.languageswork.org.uk/>

¹¹ <http://www.routesintolanguages.ac.uk>

Language skills have variously been classified, depending on context, as “specific”, “added-value” “generic”, “general”, “life” and “cross-sector” skills. The same descriptions can be ascribed to intercultural skills.

Language and intercultural skills range from a professional core activity, where the possession of either language skills or intercultural skills defines the occupation (translation, interpreting, intercultural consultancy), through teaching (where the profession is that of a teacher/trainer but is not complete without the language specialism), via occupations which require language or intercultural skills (such as international contact and call centre handling) and occupations which require language or intercultural skills for truly effective performance (those associated with all forms of international relationship management) to occupations where language or intercultural skills are in no sense job requirements, but where their occasional availability or application has the capacity to add value to a job role for employer, employee and customer (for example, in relation to the cleaning staff at Heathrow Airport¹²).

For the purposes of this report, the “core” sectors will be regarded as those where normally a period of formal training is required (usually to first degree level or equivalent) which is then followed by further postgraduate training and/or a probationary period of professional acclimatisation. – Interpreting, Translation, (including BSL and Public Sector interpreting), Teaching, Training, Coaching and Consulting in a language or intercultural studies.

1.4. The core sectors

1.4.1. Interpreting and Translation

LMI research for the translation and interpreting sectors was undertaken in autumn 2007 in preparation for the development of a Sector Qualification Strategy. This section therefore briefly summarises the information on the sector footprint contained in that longer document.¹³

The UK sector covers a multitude of provision, qualifications, levels of achievement and different professional registers. Interpreters and translators work predominantly freelance, mostly entirely independently but some also work part time for larger organisations. The people engaged in interpreting and/or translation activity possess a great variety of skills. They encompass unqualified bilingual people, who may have skills and experience; fully trained and experienced professional translators and interpreters; and people with postgraduate degrees and theoretical skills. Since this is an unregulated profession, all are able to call themselves interpreters and translators.

The LMI research confirms that the interpreting and translation market is truly international. This applies to the organisations which commission and deliver the product, the workforce and the student population. Research also indicates that the changing and unmet demand for interpreting and translation is virtually impossible to track¹⁴. As a result it is not possible to accurately quantify demand.

¹² See *Heathrow: Talking to the World*: A study of language needs at the airport undertaken for London West LSC by CILT, the National Centre for Languages in 2005.

¹³ Labour Market research for the Qualifications Strategy in translating and interpreting carried out by Strategia Limited on behalf of CILT, the National Centre for Languages Jan 2008.

¹⁴ See work undertaken by Ann Corsellis on the Aequitas project

However, it is clearly important for the UK industry to position itself as a strong player in order to keep market share.”¹⁵

The growing diversification of the UK population means that the potential demand for public service interpreters and translators has increased substantially. It is understood that no authoritative research has been done to quantify the demand.

Increasing globalisation of private sector business activity, workforce, client and customer base and an increasingly multilingual workforce within the UK have emerged more clearly as drivers of changing employer demand on the UK translation and interpreting sector. There is urgent need to assess the impact of these drivers on the profession both short and long-term.

1.4.2. Language teaching

Routes into language teaching in the state maintained sector require Qualified Teacher Status (QTR), usually via a postgraduate teaching qualification (PGCE) or an undergraduate course (BEd).

The population of teachers of languages at maintained schools in England was last measured in 2002, when it was estimated that there were 16,000 teachers of French, 6,900 German, 3,600 Spanish and 1,400 of other languages. A further survey is due to be published later in 2008.

The equivalent figures for Scotland in 2004 were 1,112 teachers of French, 261 German, 78 Spanish and 212 other MFL giving a total of 1663 counted on the basis of main subject taught.

In Wales the General Teaching Council records for 2007 564 teachers of French, 112 German, 33 Spanish, 3 Italian and 103 other foreign languages. (It should be noted that these figures are based on the subject in which the teachers were trained. Figures for the number of teachers recorded by actual subject taught were slightly higher at 874 total, which might be a result of adding in teachers of EFL.

A survey carried out for the Department of Education in Northern Ireland in 2006 suggests that there were approximately 438 teachers of MFL in secondary schools. Departments reporting teacher shortages were relatively low at 7% of respondents to the survey.¹⁶

Because of the fluctuations of population and in order to ensure that supply in different age or subject specialisms meets the demand created by Government initiatives and demographic change, Governments exercise control over the number of training places which will be funded in any one year.

Where applications for a subject area are not sufficient to meet the Government's objectives, the subject may be designated a “shortage subject”. This designation attracts financial incentives to encourage prospective applicants. Modern Languages is classified as a shortage subject in England and Wales. This is not the case in Northern Ireland, where PGCE quotas have been reducing. Here there has been an outflow of graduates to take up training in England.

¹⁵ Workforce Research: Interpreting and Translating. Dr. P. Schellekens for LNTO funded by FCO Languages Group 2004.

¹⁶ DENI: Recruitment and Retention of Teachers in Post-Primary Schools in NI. Research Report 43 (2006)

Applications for PGCE courses in Modern Languages in Great Britain in 2007 were down on 2006 by 8% in French, 10% in German, 18% in Spanish and nearly 11% in “other languages”. (There was a slight increase in applications in Scotland and Wales which offsets higher declines for England – minus nearly 20% for German and Spanish).

The picture in England, particularly, is in flux as a result of two Government decisions:

- The decision to introduce a modern language to children from age 7 has increased the demand for teachers who can add this subject area to their repertoire or use an existing skill. DfES research in 2002/3 established a number of possible in-service routes to increasing the availability of Modern Foreign Language (MFL) teachers at Primary Level.¹⁷ Here, there are therefore skills gaps, since teachers in this age range teach more than one subject, as well as a shortage of initially trained teachers which needs to be addressed.
- The decision to make modern languages an optional subject at 14+ created an immediate and drastic drop in the number of pupils continuing with a language and this, in turn, was reflected in a decline in the MFL offer at secondary level as schools rationalised provision in face of falling demand.

The recent Dearing Report investigating ways of encouraging young people to maintain their language study at secondary level and into higher education recommended closer liaison between schools, colleges, universities and employers (now in place as the HEFCE-funded Routes into Languages project). It further included the recommendation that a wider range of languages (including Mandarin) should be available at secondary level.

Most recent figures for students studying languages at university suggest a slight increase after some years of decline. This needs to be maintained and further increased if the demands of the specialist language professions including teaching are to be met. Indeed, since teaching is at the front end of the supply chain, the potential for a vicious circle is clear.

1.4.3. Language training

MFL teaching in the Further Education sector has been in decline for some years, particularly in respect of vocationally related courses.

As funding and curricular changes have taken place, languages departments in FE have been closed or merged with other departments and a typical organisational arrangement is now for a single full-time member of staff to organise the MFL programme which is delivered by part-time staff.

It should be noted, though, that FE colleges also offer commercially costed bespoke language training to employers and that recreational language courses remain popular.

¹⁷ DfES survey of PFML provision (Research Report RR572 published 2004)

Since 2007, lecturers in Further Education have been required to gain “Licensed Practitioner” (LP) status via the Institute for Learning. Those who were teaching in FE before 2001 are exempt from this requirement, although it is expected that employers will increasingly regard LP as the benchmark for appointment.

The 2007 regulations also require all lecturers in FE to undergo 30 hours per year of CPD. This is reduced pro rata for part-time lecturers (the majority in MFL), although the minimum number of hours is 6.

Due to the shortage of language teachers of specific foreign languages in FE many colleges rely on recruiting native speakers, many of whom are initially untrained. As a result of this, it is likely that there will be demand from this group and the as yet unregulated profession of business language trainers for qualifications to obtain LP status. It is not clear at this early stage whether capacity planning to cover the training implications for languages has taken place, but it is likely that there will be skills shortages or gaps for those required to provide the CPD as well as a new requirement for certification and assessment of the training.

At the same time, it should be noted that, as with the translation and interpreting sectors, the private language training sector is not regulated. It is the case that, whilst the reputable private sector training companies set their own standards for recruitment and staff training and performance, there are many freelance or small operations where quality of delivery may be an issue.

The education of employers to encourage them to seek specific trainer qualifications or to ask particular questions before appointing a trainer, is as important for language training and coaching as it is for engaging the services of a translator or interpreter.

1.4.4. Training and consultancy in Intercultural Working.

At a European level skills for intercultural working have been aligned with language skills within the European Commission and Council of Europe. Skills for intercultural working are also aligned with language skills within the ambit of the SfBN and CILT.

Within the professional sector the occupations involved are those of trainer/coach as well as consultant in organisational behaviour or communication. Clearly, too, as with languages, there is a need for teachers/educators to maintain or increase the supply line.

The identification of the field “intercultural working” is relatively new within the skills research canon. Although academic research into intercultural communication has an extensive history, its manifestation within the business environment and especially business training traditionally took the form of “cultural briefing”.

This approach is, by definition, specific to the culture of the country in question and explains its differences from the culture of the trainee group. Critics of such an approach evoke the concept of “cultural imperialism” as there is the risk of an underlying assumption that the “home” culture is the norm and that in this way racial or national stereotyping will be perpetuated.

In the past few years increasing globalisation of the business experience and particularly the growing multi-cultural mix of the UK workforce and population has led to the development of an approach to intercultural communication which focuses on respect for “otherness” and a willingness to understand that others may not see one in the way in which one sees oneself.

There is a growing body of academic research which, similarly to that for languages, links strategic implementation of corporate intercultural communication with business success.

The approach based on respect for “otherness” underpins CILT’s NOS in Intercultural Working, which are currently at the final consultation stage.

The NOS themselves are a response to growing demand from employers faced with the changing needs already identified.

Because of the relatively recent recognition of intercultural communication as a business skills area, there are at the time of writing no qualifications in intercultural working outside the Higher Education sector.

Business training is carried out by commercial training organisations (many of which are also language trainers) and by university departments’ commercial training sections.

It seems likely that the practice of “cultural briefing” will continue to run alongside training for intercultural working. (Cultural briefing is an easy concept and a cheap option by comparison with the attitudinal change implications of training in intercultural working). Cultural briefing, however, cannot address the issues of diversity which are of increasing importance for the management of the multicultural workforce and dealing with social exclusion.

Training in the private sector is, as with languages, unregulated.

There is therefore in this sector an urgent need for the development of qualifications based on the NOS, both as a means of introducing the potential for greater regulation of the sector and to establish norms for the training of trainers within the field.

Whilst cross-cultural briefing is offered by significant numbers of freelance workers and by some language training companies, the number of organisations offering intercultural training is at the moment quite limited. The consultation exercise for the present NOS identified 22 providers of training and consultancy in intercultural working.

There are two main international organisations for Intercultural Communication, both with UK branches:

- SIETAR: The Society for Intercultural Education, Training and Research
- IALIC: The International Association for Language and Intercultural Communication.

Both organisations have worked closely with CILT in developing the NOS in Intercultural Working.

1.4.5. Transition from professional to cross-sectoral

It should be noted that there is a direct relationship between the ability to recruit and train workers in the professional language and intercultural skills sectors, particularly teaching, and the subsequent availability of those skills as “added-value” skills within the general workforce.

1.5. The Cross-Sector footprint

Language and intercultural skills do not form a sector, but they are essential skills across all industrial or commercial activities. Language and intercultural skills also form an important or an advantageous component of the overall skills make-up of a wide range of occupations and the language service industry adds value to all sectors. In this regard they are cross-sector skills.

This report seeks to examine the nature of this demand for language and intercultural skills specifically for business and employment purposes. It also seeks to assess the supply of language and intercultural skills to the UK workforce.

However, data from the European Union suggests that overall skills capacity in other languages is lower in the UK than in any other EU country except Hungary.¹⁸ The Language Skills Alliance between *GoSkills* and CILT, the National Centre for Languages was established to respond to this breadth of potential demand.

An important part of CILT's work, which is encapsulated in the strategic vision of the Language Skills Alliance, is that of persuading employers to think strategically about the role and management of international communication within their organisation, whether this be in relation to the outside world or in relation to their own workforce.

An important tool in this process is at present missing: namely an occupational and functional map showing the job roles and functions within an organisation where the presence of language or intercultural working skills might bring efficiency gains or conversely might impair efficiency. An application for funding to undertake this work has been submitted and it is hoped that a mapping exercise will be undertaken as part of the 2007/8 workplan.

To illustrate the potential extent of the cross-sectoral footprint covered in this report it is possible to highlight a list of occupations in which, according to a focus group convened to consider the proposed NOS in Intercultural Working, units from these proposed NOS could be seen to be potentially relevant:

- Line management roles
 - Line managers
 - Managers
 - National Occupational Standards manager
 - Job Centre manager
 - Site managers
 - Warehouse manager
 - Caravan park managers
 - Apprenticeship manager
 - Operations managers
- Supervisory roles
 - Supervisors
 - Team leaders
 - Warehouse team leader

¹⁸ The EU's Eurobarometer Report for 2005 showed only 30% of UK residents claiming to be able to hold a conversation in one or more languages other than their native tongue. (Germany 65%, France 45%, Hungary 29%)

- Project management roles
 - Project managers
 - UK project managers working overseas
 - Consultancy project teams working in partnership with department communities, local government and Department of Health
- HR and Training roles
 - HR managers
 - Training manager, National School of Government
 - Trainers
- Specialist roles
 - Buyers
 - Experts
 - Outdoor education instructors
 - Personal trainers
 - Play workers
 - Sports coaches
 - Tax collecting officer
 - Librarians
 - Nurse
 - Analysts
 - Drivers
 - Technical support
 - EU Secretaries, Brussels
 - Regional Associates
 - RLNs and BSS staff
- Outward facing staff
 - Communication teams
 - Conferencing advisers
 - Department of Education and Skills, Local Authorities, Regional Employer Organisations
 - Directorate, Senior directors
 - Employer teams
 - Receptionists
 - Sales/telesales
 - Stakeholder teams
 - Strategic marketing and communication Adv/DM/PR
- Remote working
 - Telephonists
 - Call Centre Workers

This list of occupations is derived from a small group of employers but serves to illustrate the breadth of application and might apply equally well to language skills.

Identifying the job functions within which linguistic or intercultural skills might be advantageous or necessary will provide the crucial focus needed to engage employer interest in strategic skills planning.

Since the introduction of Sector Skills Councils CILT has worked either nationally or regionally with twelve SSCs on LMI or skills development projects for languages or intercultural communication skills. These are: eskills, Improve, SEMTA, *GoSkills*, People 1st, ProSkills, Lantra, Construction Skills, Financial Services, Skillfast, Skillsmart Retail and Summitskills.

All SSCs have at some stage been involved in consultation exercises relating either to language or intercultural skills.

1.6. Research methodology

The comprehensive research process behind this report included:

- A detailed review of available literature relating to languages and intercultural skills based on the extensive research undertaken by CILT in this area.
- An analysis of available national datasets for languages and intercultural skills.
- The use of a wide range of employer case studies developed by CILT, which have been selected to cover each of the nations and regions of the UK and also a broad range of industrial and commercial activity within different sectors of the economy.
- Semi-structured, in-depth interviews with 14 businesses across the four nations, which represent a broad range of business activities.
- Semi-structured, in-depth interviews with 11 language and intercultural providers across the four nations, which represent all sectors of educational activity in relation to languages and intercultural skills.
- The involvement of CILT and GoSkills throughout the programme of research.

The research approach undertaken has focused on the need to deliver three distinct components of the sector skills agreement process:

- A Skills Needs Assessment covering the current and likely future demand for skills within languages and intercultural skills (Stage 1 of the SSA process).
- An Essential Skills Supply Assessment, which provides a detailed analysis of provision and investment in education, training and skills across the sector (Stage 2 of the SSA process).
- A gap analysis, which provides a basis for communicating key supply and demand issues and potential solutions which would improve future business performance within the sector. The tight timescales within which the research fieldwork, analysis and reporting has been undertaken has meant that consultation on this aspect has been limited. This is a recognised gap that has largely been imposed by SSDA reporting deadlines. However, it is a gap that CILT intend to fill through wider consultation within the sector and with employers. The goal, following consultation, will be to develop broad based support for an action plan for the sector.

Subject to data limitations, every effort has been made to ensure that each of these three components is UK wide in scope, but with specific sections covering specific information in each of the four UK nations.

However, it is important to recognise at the outset that data limitations have imposed considerable challenges on the ability of CILT to comprehensively deliver the demand and supply components of the sector skills agreement process. These data limitations can be summarised as follows:

- Language and intercultural skills is not a sector, but a skillset that cuts across all sectors. Data and information that is available to other sectors of activity by virtue of the Standard Industrial Classification (SIC) is not available in relation to languages and intercultural skills. It is therefore simply not possible to undertake certain types of analysis traditionally associated with the development of LMI. For example, in developing a profile of employment in the sector.
- There has been no recent research undertaken on the occupations that have a requirement for language skills¹⁹. This has made any meaningful occupational analysis extremely difficult.
- No large scale quantitative employer surveys have been undertaken, which attempt to assess the precise nature of employer demand for languages and intercultural skills. Such a survey is beyond the scope of this labour market intelligence research.
- Although a bespoke request was made through GoSkills to access Individual Learning Records (ILR) data from the Learning and Skills Council (LSC) in respect of Vocational and Educational Training (VET) provision for languages, the LSC were not able to supply any data within the timeframe associated with the LMI research. This meant that the analysis of VET provision was limited to a survey undertaken by CILT.²⁰ As a consequence it was not possible to develop a detailed profile of language learners within VET (including Work Based Learning) or examine achievement related information.

The research methodology has sought to compensate as far as possible for these information weaknesses in relation to the language and intercultural skills sector by:

- Maximising the use of the extensive range of employer research carried out by CILT, Regional Language Networks and the Language Skills Alliance.
- The innovative use of existing datasets. Although the National Employer Skills Survey (NESS) in England is not capable of being analysed in relation to the language and intercultural skills sector (because there is no SIC code) or occupations, it has been possible to analyse NESS by examining employers that have highlighted language training as a skills gap and/or recruitment difficulty.

¹⁹ The original “occupational mapping” exercise, which was produced in 1989 in preparation for the first National Standards for Languages in the Workplace, attempted to identify by SOC those occupations which might have a requirement for language skills. The resulting list of occupations produced an annex of six sides. Unfortunately, the report itself, which was not produced in electronic format, is no longer available.

²⁰ Survey of vocationally related language learning in Further Education, CILT, 2006.

- Carrying out a programme of qualitative research with both employers and learning providers.

The 14 employers interviewed were identified by CILT and were selected to provide a cross section of the sector in terms of sector (public and private) and nation (England, Northern Ireland, Scotland and Wales).

- 1 Black Country Metals Ltd
- 2 Astra Zeneca
- 3 Airbus UK
- 4 GCHQ
- 5 Cardiff Airport
- 6 John Laing Integrated Services
- 7 Peugeot
- 8 BDB
- 9 Honeywell
- 10 Douglas Associates
- 11 Serious Readers
- 12 London Underground
- 13 Foreign & Commonwealth Office
- 14 Transition Plus Ltd

The language and intercultural skills providers interviewed were identified in conjunction with CILT and were selected to provide a cross section of the sector (public and private), nation (England, Northern Ireland, Scotland and Wales) and type of provider (Private, HE and FE)²¹.

Intercultural Providers

- 1 Anglia Ruskin University (x2)
- 2 Kwintessential Ltd
- 3 Heather Barker, Consultant

Language Providers

- 1 Solihull College
- 2 Belfast Metropolitan College
- 3 University College Birmingham
- 4 Brasshouse Language Services
- 5 Defence School of Languages
- 6 Transglobal Language Cultures
- 7 Morley College

²¹ Although every effort was made to include providers from all four nations within the research, it was not possible to arrange an interview with a provider in Scotland within the limited timeframe available for fieldwork during this research project. However, a detailed analysis of provision in secondary, further and higher education in Scotland has been included within the supply side analysis.

1.7. Structure of the report

The research findings and data analysis conducted for this labour market intelligence research is divided into thirteen further chapters:

Demand for language and intercultural skills

Chapter 2 sets out the essential policy context for language and intercultural skills within different countries in the UK. In particular a number of key drivers of strategic importance have an important role in determining national skills priorities and influencing the demand for skills within different nations of the UK.

Chapter 3 highlights issues concerning sector competitiveness and productivity at a national and international level.

Chapter 4 outlines the key drivers of demand for language and intercultural skills based on research previously carried out in the UK

Chapter 5 sets out employer views on a range of key issues on the development of language and intercultural skills including recruitment issues and skills shortages, skills gaps and retention and labour turnover.

Chapter 6 includes a wide range of employer case studies of good practice in relation to language and intercultural skills in different nation and regions of the UK and attempts to assess the lessons learnt for other UK businesses.

Chapter 7 draws together conclusions based on the evidence of the preceding five chapters on the demand for language and intercultural skills.

Supply of language and intercultural skills

Chapter 8 examines the qualifications available for language and intercultural skills within secondary education, vocational training and education and higher education.

Chapter 9 brings together a range of information on current language learning in Higher Education.

Chapter 10 examines current language learning in Further Education.

Chapter 11 examines current language learning in secondary education.

Chapter 12 sets out provider views on current language learning.

Chapter 13 draws together conclusions based on the evidence of the preceding five chapters on the supply of language and intercultural skills.

Chapter 14 involves drawing together the conclusions on the overall LMI analysis in order to highlight gaps in the demand and supply of language and intercultural skills and to set out the next steps for action on skills within this sector.

2. Policy context

2.1. Introduction

The purpose of this chapter is to set out an essential policy context for skills development in the UK and within each nation of the UK. The aim of the chapter is to highlight the key drivers for skills development and assess their importance in influencing the demand and supply of skills in:

- The United Kingdom.
- England.
- Northern Ireland.
- Scotland.
- Wales.

2.2. The United Kingdom

A number of key drivers of strategic importance in the UK need to be considered as an essential policy context in relation to foreign language and intercultural skills needs. These drivers underline the extent of change taking place in relation to the planning and delivery of training and up-skilling both at a national and regional level. The Leitch Review of Skills²² provides a critical context which:

- Sets out the case for investment in training and up-skilling. The review indicates that although employers already provide a substantial amount of training for their employees, most is unaccredited, training is disproportionately focused on the highly skilled and around one third of organisations do no training at all.
- Outlines the scale of the challenge faced by the UK if it is to achieve a world-class skills profile and respond effectively to globalisation. The review points out that more than 70 per cent of the 2020 working age population have already left compulsory education and many of these are in work, underlining how the UK cannot rely solely on improving the skills of young people to deliver a world-class skills base in 2020 – those already in the labour market must have the opportunity to improve their skills. The review recommends government commitment and funding to ensure the whole labour force has the platform of skills needed for work, but a responsibility for employers to help employees to gain these skills, including a legal entitlement to workplace training, if progress falls short, in 2010.
- Underlines the importance of effective development and deployment of employees' skills. The review highlights how skills must be effectively used for their benefits to be fully realised. The review recommends the government ensures appropriate provision of advice and brokerage services to help businesses to invest effectively in skills, and targeted support to improve management skills to ensure maximum use of skills in the workplace.

²² Leitch Review of Skills; Prosperity for all in the global economy – world class skills; final report, December 2006.

- The need to work with skills suppliers to develop 'fit for purpose' training provision. The review indicates that the UK will not reap the benefits from a world-class skills base unless the skills delivered are the ones employers and individuals need and businesses want, and know how to use effectively in the workplace.
- The necessity of overcoming any factors acting as barriers to progress in relation to training and up-skilling. The review highlights a number of barriers to efficient investment in skills that all constrain the scale and effectiveness of employer training in the UK, including lack of awareness of the benefits of training, the cost and time for training and the quality of leadership and management.
- The importance of ensuring businesses realise the real business benefits from this activity. The review indicates how achieving a world class skills base will drive increased productivity and profitability for employers and improved public services and as global economic change continues, the skills of their employees will be the key way for employers to remain competitive in the global economy and to adapt to change. However, the review points out employers will not invest further in skills unless they can see the benefits that such investment will bring and how they might use new skills.

2.2.1. Barriers to training

Recent research published by the SSDA further underlines the barriers to effective training and upskilling, highlighting a number of reasons for 'market failure' in the delivery of skills and training²³, including:

- Imperfect information: Employers or individuals lack reliable information on quality and content of learning opportunities available to them, and the benefits that may accrue from investment in particular types and levels of training.
- Time preference, short-termism and risk aversion: Individuals and organisations may fixate on the short-term and ignore longer-term benefits. In addition, both organisations and individuals may be risk averse, and the returns on investment in skill are often uncertain, fluctuating with general economic and labour market conditions.
- Capital market imperfections: Problems may be encountered in obtaining funding to invest in skills. For individuals this means constraints on personal loans. For organisations there is the risk of investment in staff that may leave and take their skills with them.
- Externalities, labour market imperfections and the poaching of skilled workers: The report points out that externalities can take a number of forms, in particular, that having invested in upskilling their staff, these can be poached by another employer who has spent no money on training.

The Leitch Review of Skills²⁴ underlines a number of particular barriers to training faced by employers. The review:

²³ SSDA Catalyst – Issue 1 – Market Failure in Skills; Professor Ewart Keep, February 2006.

²⁴ Leitch Review of Skills; Prosperity for all in the global economy – world class skills; final report, December 2006.

- Found that the barriers employers face in training particularly constrain employer investment in training low skilled workers. For example, organisations may find it difficult to value the indirect benefits of training at lower levels, such as reductions in staff turnover and improvements in morale and motivation, all of which also contribute to efficiency. Organisations may fear that generic training at lower levels could lead to other employers poaching their workers.
- Indicated that employer concerns over the relevance of qualifications are particularly acute at the lower level. Many level 2 qualifications have little or no wage return. Employers also see basic skills, such as literacy and numeracy, as being the responsibility of the school system and the government. Rather than investing in the basic and foundation skills of their employees, employers find ways to work around employee skills needs in the workplace.

2.2.2. The benefits of investment in training

The Leitch Review²⁵ sets out recommendations for the optimal level of skills in the economy. The review estimated that additional annual investment in skills up to level 3 will need to rise to around £1.5 - £2 billion by 2020 if the UK is to achieve world class status at basic and intermediate levels.

In addition the review indicated that increased investment is required in Higher Education to achieve world class status. The review has estimated the enormous benefits that achieving this ambition would bring for the UK, indicating that the prize would mean more economic prosperity and increased social justice. The review estimated such an achievement would deliver a possible net benefit of at least £80 billion over 30 years, an annual average of £2.5 billion. This would be driven by increased productivity: the rate of productivity growth would increase by at least 10 per cent, helping to close the UK's productivity gap and leaving the average worker producing £1,800 more output each year by 2020 than would otherwise be the case.

The review also estimated that this would imply the employment rate would grow 10 per cent more quickly than projected, with at least an additional 200,000 people into work by 2020, helping to move towards the ambition of an 80 per cent employment rate. Such an achievement would mean people would have a fairer chance to progress; there would be less social deprivation and positive wider impacts on health, crime and social cohesion.

The Leitch Review clearly sets out the benefits to the wider economy and society of a significant increase in investment in training. Investment in training of course, also has wide ranging benefits for both individual employers and employees. A recent evaluation of employer training pilots²⁶ explored such benefits from both a trainee and employer perspective.

Trainee perceptions of the impact of training included:

- Ability to offer better quality service or deliver better quality product.
- Skills relevant to a current or previous job.
- Skills relevant to a future job or career.

²⁵ Leitch Review of Skills; Prosperity for all in the global economy – world class skills; final Report, December 2006.

²⁶ Employer Training Pilots: Final Evaluation Report; Jim Hillage, George Loukas, Becci Newton and Penny Tamkin; Institute for Employment Studies, 2006.

- Team-working skills.
- Greater self confidence.
- Ability to make fewer mistakes.
- Greater motivation and interest in work.
- Problem-solving skills.
- Ability to work faster.
- Literacy or numeracy skills.
- ICT skills.

Employer perceptions of the impact of training were explored in relation to the impact on the learner, attitudes and quality.

Employer views of the impact of training on the learner:

- Increased self-confidence.
- The opportunity to progress onto further qualifications.
- Skills relevant to a future job / career.
- Skills relevant to a current / previous job.
- Able to offer better quality service / deliver better quality product.
- Greater motivation and interest in work.
- Team-working skills.
- Making fewer mistakes.
- Problem solving skills.
- Literacy or numeracy skills.
- Ability to work faster.
- ICT skills.

Impact on attitudes

- Trainees are more confident in their work.
- Trainees feel more valued.
- Trainees are more aware of organisational needs.
- Trainees work better together.
- Trainees are more motivated.
- Trainees are more accepting of change.

Impact on quality

- Improvements in product service quality.
- Trainees deal with unexpected situations more effectively.
- Trainees make more decisions on their own.
- Trainees come up with more ideas.
- Trainees make fewer mistakes.
- Productivity improvements.
- Reductions in staff turnover.
- Trainees work harder.
- Decreases in absenteeism.

2.3. Policy context for skills development in England

A number of key drivers of strategic importance nationally need to be considered as an essential policy context for the development of foreign languages and intercultural skills and also in terms of determining national skills priorities.

2.3.1. The national skills strategy for England

The national skills strategy for England²⁷, launched in July 2003, examined the state of skills in the UK and came to the conclusion that the UK was suffering from a skills deficit compared to countries with similarly advanced economies within Europe and the USA²⁸. This deficit was considered to be particularly acute within the technician, higher craft and associate professional occupations.

The national skills strategy also introduced a number of key measures, which included the:

- Introduction of a new entitlement to free learning for all those studying for their first level 2 qualification as a skills foundation for employability.
- Provision of targeted support for higher qualifications (technician, higher craft and associate professional skills at level 3) in priority areas to meet sectoral and regional needs.
- Development of more flexible qualifications, including:
 - Dividing more qualifications into units, so accreditation can be built up more easily.
 - Speeding up accreditation of qualifications.
 - Improving assessment of people's existing skills and knowledge.
- Improvement of information, advice and guidance (IAG) services for adults.
- Extension of access to free information and communications technology (ICT) learning – ICT is classified as a basic skill along with literacy and numeracy.
- Raising of the quality of modern apprenticeships and lifting the age cap for participation.
- Encouragement of local learning communities.
- Reduction of bureaucracy and introduction of more straightforward audit requirements.
- Learning provision to meet the following criteria:
 - Led by needs of employers and learners.
 - Shaped by skills needs prioritised by sector, region and locality.
 - Make the best use of ICT to deliver and assess learning.
 - Give colleges and learning providers maximum discretion in deciding how best to respond to needs.

2.3.2. The 14-19 Education and Skills White Paper

The White Paper²⁹ sets out proposals, which build on the existing education system, but are designed to:

²⁷ 21st Century Skills – Realising our Potential, The National Skills Strategy for England, July 2003.

²⁸ Although 21st Century Skills – Realising our Potential contains a UK wide analysis, the Department for Education and Skills indicated that the strategy was primarily concerned with England.

²⁹ The 14-19 Education and Skills White Paper, Department for Education and Skills, February 2005.

- Ensure that every young person masters functional English and Maths before they leave education.
- Improve vocational education.
- Stretch all young people and help universities to differentiate between the best candidates.
- Re-motivate disengaged learners.
- Ensure delivery.

2.3.3. Skills White Paper 2005

'Getting on in business, getting on at work'³⁰, focuses on the skills of adults already in, or seeking to enter, the labour market. The aim is to help even more adults get the skills they need to move from welfare into jobs, and to progress in their careers.

At the regional level, the regional skills partnerships of the regional development agencies, the Learning and Skills Council (LSC), Jobcentre Plus, Small Business Service and sector skills councils are seen as the key regional economic development players in integrating regional activity on training, jobs, innovation and business support, creating dynamic regional economies and so tackling disparities between regions.

The white paper indicated that training is to be built up from employers' needs, and delivered in the workplace to suit their operational requirements. Government intends to place purchasing power in the hands of the employer, so that they can determine how public funds are best spent to meet their priorities, rather than funds being routed direct to providers.

The white paper is therefore proposing to give employers of all kinds – private, public and voluntary sector – more choice over the training provider they wish to work with. It is intended to be a new form of partnership between the government and employers to enhance learning opportunities and meet skills needs. At the heart of the programme is a brokerage service that will work on behalf of the employer.

Employers will be given a strong voice in the design and content of vocational qualifications through sector skills councils. Sector skills agreements between employers will set out learning needs, commit employers to collaborative action, and ensure that public funds respond directly to employer priorities.

Government sees SSAs as having enormous potential power in bringing employers together to decide their priorities for collective action, and how they can best support higher productivity. Agreements set out both the funding contributions that employers are prepared to make themselves and the priorities for shaping the allocation of public funds with the respective funding councils.

³⁰ Skills: Getting on in business, getting on at work, The Government Skills White Paper; March 2005.

The government has emphasised two particular aspects. First, it must be easier for people to climb up the skills ladder, in steps to suit their talents and motivation, from the basics of literacy, language and numeracy through to higher education. Each step in that ladder must equip young people and adults with the skills for employability and give them recognition through qualifications for what they achieve. Second, information, advice and guidance must be widely available for all adults who want it, to help them make sense of what is on offer, and the best way of linking skills, learning and jobs.

2.3.4. Agenda for Change

The Learning and Skills Council³¹ sets out proposals to:

- Create a nationwide network of colleges – and other providers – focused on the needs of employers.
- Develop with employers a quality mark for those colleges – and other providers – so that employers know they meet exacting standards and that the services they provide will be of high quality and responsive to the real needs of their organisations.
- Increasingly make employers aware of the benefits of working with these quality-marked colleges – and other providers – so funding flows accordingly in line with employer choice.
- Develop the National Employer Training Programme (NETP) as a powerful, demand-led mechanism for changing the way in which training for adults is delivered. (As set out in the skills white paper of March 2005).

2.3.5. National Language Strategy for England

A national language strategy was produced for England in 2002.³² The vision of the strategy was to transform the country's capability in languages by providing:

- an opportunity for early language learning to harness children's learning potential and enthusiasm.
- high quality teaching and learning opportunities to equip young people with the skills they need to access opportunities in the world of travel and work
- opportunities for lifelong language learning.
- recognition that language skills are central to breaking down barriers both within England and between other nations.

To achieve this vision the strategy set three overarching objectives:

- **To improve teaching and learning of languages**, including delivering an entitlement to language learning for pupils at Key Stage 2, making the most of e-learning and ensuring that opportunity to learn languages has a key place in the transformed secondary school of the future.
- **To introduce a recognition system** to complement existing qualification frameworks and give people credit for their language skills.

³¹ Agenda for Change, Learning and Skills Council, August 2005.

³² Languages for All: Languages for Life, 2002 published by DfES.

- **To increase the number of people studying languages** in Further and Higher Education and in work-based training by stimulating demand for language learning and encouraging employers to play their part in supporting language learning.

In 2002 blockages to the system were considered to be

- Teacher Shortages, particularly at secondary level.
- Limited Language learning opportunities.
- Too many schools and teachers working in isolation, without access to support networks.
- Underdeveloped use of ICT.

Specifically in relation to business and employment the strategy recognised that:

“Too few employees have the necessary language skills to be able to engage fully in international business, and too few employers support their employees in gaining additional language skills as part of their job.”

In moving towards languages for all in employment the strategy sought to build on the talent within the workforce and ensure that more businesses are better equipped for international trade. The Learning and Skills Council and the new CILT/LNTO merged body were asked to consider the development and piloting of good practice in raising employer awareness and addressing language skill needs from April 2003 onwards, drawing on the experience of those regions which already have regional strategies in place. The strategy also looked to the Sector Skills Development Agency, working with Sector Skills Councils, to consider how specific business sector needs can be met and feed this information into their regional strategies.

In measuring success the strategy considered that businesses should be involved in supporting language learning and championing the importance of language skills and able to recruit employees with a wider range of language skills to better meet their business needs.

2.4. Policy context in Northern Ireland

This section provides a brief synopsis of the wider policy context for skills development in Northern Ireland.

2.4.1. Policy context for skills development in Northern Ireland

The draft Economic Vision for Northern Ireland October 2004 set out a strategic vision for the Northern Ireland economy³³. It focused on how Northern Ireland can be a more competitive and productive region, as well as a fairer society.

The strategy covered different areas of the economy and regional growth, and listed priorities for each area. Some of the issues covered were the need to promote and encourage enterprise, improve competitiveness, achieve high value-added, increase investment in R&D and promote innovation / creativity to contribute to competitiveness and driving economic growth.

³³ Draft Economic Vision, Department of Trade, Enterprise and Investment, Northern Ireland, October 2004.

Specifically in relation to skills, in 2004, the Department for Employment and Learning within the Northern Ireland Executive launched the Skills Strategy for Northern Ireland, setting out five key priorities for the region in terms of ensuring future competitive success³⁴. These priorities are to:

- i. Improve the assessment of skills needs, existing and potential, and improve the flow of labour market information.
- ii. Improve the relevance, coherence, response and quality of current education and training provision.
- iii. Promote the acquisition of skills with particular emphasis, initially, on those who have not yet achieved a level 2 qualification or require assistance with essential skills.
- iv. Improve access to skills for sustainable employment.
- v. Make the supporting infrastructure easier to navigate, especially in the field of qualifications.

Within the strategy there is a clear commitment from the department and Invest NI to work with SSCs to address the major skills concerns of each sector³⁵. As such, SSCs are developing local representation and liaison arrangements to increase employer engagement.

The skills strategy also sets out the rationale for putting in place an overarching framework for the development of skills. It defined three different types of skills:

- The essential skills of literacy and numeracy and, increasingly, information and communications technology (ICT).
- Employability skills, including the key skills of teamworking, problem solving and flexibility.
- Work-based skills, specific to a particular occupation or sector.

It also highlighted the need to focus on:

- Raising the skills of the current workforce.
- Enhancing the knowledge base of those entering the workforce.
- Addressing the employability skills of those not in employment.

The consultation process undertaken in connection with the skills strategy endorsed the need for a strategic approach to skills and confirmed widespread and clear support for the suggested priorities and proposed action plan.

Following the consultation the Department for Employment and Learning published a programme for implementation of the skills strategy³⁶. The plan sets out a vision to achieve government's key aims in relation to the development of skills within Northern Ireland by:

- Enabling people to progress up a skills ladder, in order to raise the skills level of the whole workforce.
- Helping to deliver high productivity and increased competitiveness.
- Securing Northern Ireland's future in a global marketplace.

³⁴ Skills Strategy for Northern Ireland, DELNI, November 2004.

³⁵ Skills Strategy for Northern Ireland, DELNI, November 2004.

³⁶ Success through Skills: The Skills Strategy for Northern Ireland: A Programme for Implementation, DELNI, February 2006.

In order to deliver this ambitious vision in respect of skills, a 10-year timeframe is envisaged for the full effects of the strategy to be realised. However, for the purposes of implementation, the initial focus for delivery is a period of three years; after which the implementation plan will be refreshed, programmes will be evaluated and progress towards achieving the vision assessed.

The component projects and strands within the implementation plan are grouped into four broad themes, which underpin the vision:

- Understanding the demand for skills.
- Improving the skills levels of the workforce.
- Improving the quality and relevance of education and training.
- Tackling the skills barriers to employment and employability.

A key target is set out under each project included within each of the above four themes.

2.4.2. National Language Strategy for Northern Ireland

In Northern Ireland a review of language skill needs has been commissioned and is due to be published later in 2008. The NI Language Network Manager is currently the Principal Investigator for the Northern Ireland review of language and intercultural skills needs.

2.5. Policy context in Scotland

Four key documents define the way in which work in relation to skills has been directed in Scotland up to 2007:

- The Framework for Economic Development in Scotland.³⁷
- A Smart Successful Scotland.³⁸
- Life through Learning; Learning through Life.³⁹
- Skills for Scotland.⁴⁰

Each of these four documents will be outlined in turn.

2.5.1. The Framework for Economic Development in Scotland

The Framework for Economic Development in Scotland (FEDS) is the Scottish Executive's overall policy on the economy. It was originally published in 2000 and was refreshed in 2004 to take account of developments in the global economy. Its vision remains unchanged from 2000, which is:

“To raise the quality of life of the Scottish people through increasing the economic opportunities for all on a socially and environmentally sustainable basis.”

³⁷ The Framework for Economic Development in Scotland, Scottish Executive, 2004.

³⁸ A Smart, Successful Scotland, Strategic direction to the Enterprise Networks and an enterprise strategy for Scotland, Scottish executive, 2004.

³⁹ Life Through Learning; Learning Through Life, The Lifelong Learning Strategy for Scotland, February 2003.

⁴⁰ Skills for Scotland, A lifelong skills strategy, The Scottish Government, Edinburgh 2007.

FEDS contains four outcome objectives for:

- Economic growth – sustained through greater competitiveness in the global economy.
- Regional development – a pre-requisite so that all regions benefit from economic opportunities.
- Closing the opportunity gap – again a requirement so that all in society benefit from improved economic opportunities.
- Sustainable development – in economic, social and environmental terms.

These four outcome objectives highlight the theme that underpins the FEDS – that of creating a productive, competitive and flexible economy for Scotland, and doing so in a way that respects the environment and helps to close the opportunity gap.

"The productivity and associated dynamic competitiveness of our enterprises remains the fundamental driver of our economic performance. It is equally the key challenge."

FEDS reiterates that productivity is the key challenge facing Scotland and stresses that, amongst other factors affecting economic development, is the need to improve the skills of the population as a whole through education at schools, colleges and universities and through lifelong learning. The strategy notes that:

"Better skills are the key to improving individual life chances, increasing the flexibility of the labour force and maintaining competitiveness."

The FEDS identifies and briefly considers the factors that drive and affect (positively and negatively) the productivity of both private enterprises and the public sector in Scotland. Amongst these are basic education and skills, the generation of knowledge, the physical infrastructure, basic entrepreneurial drive and competitiveness of enterprises, and the proper management of public finances.

2.5.2. Smart, Successful Scotland

"Our vision is of an ambitious, confident Scotland where the benefits of a strong, dynamic economy are shared across all communities."

Smart, Successful Scotland, was first published in January 2001, and sets out the Scottish Executive's strategic direction for the Enterprise Networks. It was designed to provide direction and focus for the Enterprise Networks' activities and builds on the FEDS.

A Smart, Successful Scotland concentrates on the promotion of enterprise: on business growth and on the skills of individuals underpinning that. The strategy aims to contribute to growth and productivity by focusing in on aspects of FEDS under three broad themes:

- Growing businesses: Taking forward entrepreneurial dynamism and research & development to deliver innovative companies growing in scale.
- Learning and skills: Developing skills to make best use of human capital and to prepare for tomorrow's labour market.
- Global connections: Taking forward aspects of physical and electronic infrastructure, together with building the global connections of Scottish businesses to create world class locations, part of Europe and connected to the global economy.

2.5.3. Life Through Learning; Learning Through Life

"The best possible match between the learning opportunities open to people and the skills, knowledge, attitudes and behaviours which will strengthen Scotland's economy and society."

The strategy sets out key challenges facing Scotland in terms of:

- The increasing pace of technological change in the knowledge economy, and the need for a flexible and adaptable workforce that is ready to reskill and retrain to keep pace with the economy's skills needs.
- Scotland's changing population, which will result in the country having fewer young people entering the workforce in the future. It is predicted that by 2022, 42% of the population of Scotland will be aged over 50.
- Closing the opportunity gap – recognition that learning plays an important role in providing a route out of poverty. It also enables people to take an active part in society.

The strategy also sets out the need to address key gaps in Scottish society in terms of the:

- Opportunity gap between people who achieve their full potential and those who do not.
- Skills gaps between people in work and those who are not - 35% of people not in work do not have any qualifications.
- Productivity gap between Scotland and the leading economies of the world.

Lifelong learning is considered vital to bridging these gaps.

It is in the light of these three strategies, and the need for key stakeholders to work collaboratively and in partnership, that the Scottish Executive has embarked on the implementation of sector skills agreements. Scottish ministers and the Scottish Executive have now committed to participating in the development of sector skills agreements with all of the sector skills councils, providing each is in a position to start the process.

2.5.4. Skills for Scotland

Skills for Scotland: A Lifelong Skills Strategy was launched by the Scottish Government in September 2007⁴¹. The strategy aims to promote equal access to and participation in, skills and learning for all. It aims to remove the barriers that limit what people can do and can be.

The strategy is a framework to show how all of the constituent parts of the Scottish education and learning systems can contribute to giving Scotland a skills base that is world class. It seeks to demonstrate how sectors from Further / Higher Education to schools, community learning and workforce development can contribute to the skills agenda. As part of the strategy, the organisations Careers Scotland and Learndirect Scotland are to merge.

⁴¹ Skills for Scotland, A lifelong skills strategy, The Scottish Government, Edinburgh 2007.

The strategy sets out objectives for developing a cohesive lifelong learning system centred upon the individual but responsive to employer needs. The strategy is about ensuring people have the knowledge and skills they need to play their full part in a 'smarter Scotland'. The strategy indicates that Scotland's future prosperity and success will depend on matching the skills of its workforce with the changing needs of business and employers. In this regard the new skills strategy aims to highlight the skills valued and required both by employers and individuals.

2.5.5. National Language Strategy for Scotland

A national language strategy was produced for Scotland in 2007.⁴² A Strategy for Scotland's Languages highlights the key areas of language policy that are currently being promoted by the Scottish Executive. These include a wide range of language activity from language learning in schools to training British Sign Language interpreters. The strategy brings together the Scottish Executive's reasons for promoting this wide range of language activity, which are identified as:

- Celebrating cultural diversity.
- Promoting respect and confidence.
- Encouraging mobility and communication.
- Facilitating access and inclusion.
- Increasing economic opportunity.
- Enriching education.

The strategy also offers a number of guiding principles to shape the development of language provision in Scotland. These guiding principles are largely derived from the language activity that is currently being promoted. These principles will seek to ensure that:

- As many people in Scotland as possible will be equipped with fluent English language skills.
- That there will be fair and equal linguistic access to information and services.
- That linguistic diversity will be celebrated and multilingualism will be valued.
- That language learning and acquisition will be promoted.
- That respect for the languages spoken in Scotland will be promoted.
- That the Gaelic language will be protected and promoted.
- That the Scots language will be treated with respect and pride.

The aim of this strategy is to celebrate and promote the rich diversity of languages spoken in Scotland; to raise the profile of these languages; to ensure that this rich heritage is recognised as a national resource.

The strategy stressed the important economic, educational, social and cultural benefits that may be derived from learning foreign languages. In particular the strategy recognised that there was a need to encourage people living in Scotland to learn languages other than their own for the long-term benefit of the Scottish economy and society. In this regard the strategy expressed concern that Scottish young people could be at a disadvantage compared to their bilingual counterparts in today's global economy.

⁴² A Strategy for Scotland's Languages 2007 published by the Scottish Executive.

2.6. Policy context in Wales

This section provides a brief synopsis of the wider social and economic policy context and also the specific policy context in which skills development activities are being undertaken in Wales.

2.6.1. Social and economic policy context

The Welsh Assembly Government (WAG) aims for a Wales where everyone has the skills, motivation and opportunity to obtain good quality jobs that meet their aspirations and abilities, and where employers work with their employees and public sector agencies to raise skills to the highest possible levels to support high quality jobs in a growing economy⁴³.

The Skills and Employment Action Plan for Wales⁴⁴ has a key role in implementing this vision and it is intended to inform the delivery strategies of the Department for Children, Education Lifelong Learning and Skills (DCELLS)⁴⁵, the Higher Education Funding Council for Wales, Careers Wales, Jobcentre Plus and other key partners. It is also aligned with the European Employment Strategy and its objectives of⁴⁶:

- Full employment.
- Improving quality and productivity at work.
- Strengthening social cohesion and inclusion.

Wales 'A Vibrant Economy' sets out a vision of 'A vibrant Welsh economy delivering strong and sustainable economic growth by providing opportunities for all' and key priorities to:

- Increase employment still further, so that over time the Welsh employment rate matches the UK average, even as the UK employment rate itself rises.
- Raise the quality of jobs, so that average earnings increase and close the gap with the UK average.

2.6.2. Policies for skills development in Wales

Specifically in relation to skills, the following policies, strategies and plans have a key role in determining the delivery of skills and training across Wales:

- *Basic Skills Strategy*: In April 2005 the Minister for Education and Lifelong Learning announced that £40 million would be made available over the next three years to support activities outlined in "Words Talk - Numbers Count", the second phase of the all-age, bilingual National Basic Skills strategy for Wales.
- *Wales – a Better Country*: This document is the WAG's key strategy for the country as a whole and on that basis encompasses a wide range of issues and activities.

⁴³ Skills and Employment Action Plan for Wales, National Assembly for Wales, January 2005.

⁴⁴ Skills and Employment Action Plan for Wales, National Assembly for Wales, January 2005.

⁴⁵ The Department for Education Lifelong Learning and Skills (DELLS) replaced Education Learning Wales (ELWa) in 2006. In 2007 DELLS was changed to become the Department for Children, Education, Lifelong Learning and Skills (DCELLS).

⁴⁶ Skills and Employment Action Plan for Wales, National Assembly for Wales, January 2005.

- *Learning Pathways – 14-19*: Learning Pathways build on a widespread consultation across Wales to determine how 14-19 education should be delivered and what the country needs to achieve in terms of educational attainment to secure and grow the strong and vibrant economy that it currently enjoys. WAG believes that the transformation needed must be based on securing a better balance between:
 - Knowledge - subject knowledge, technical and occupational knowledge (hard skills).
 - Opportunities to apply this capacity in real life contexts to deepen knowledge and understanding and to develop as a learner.
 - Opportunities to develop wider personal and interpersonal skills (soft skills) through practical experience.
- *Reaching Higher and the Knowledge Economy Nexus*: Reaching Higher, launched in 2003, allocated an additional £2m to support new partnerships between Higher Education and schools and colleges. The new partnerships build on existing success by launching a variety of schemes and programmes designed to give people, particularly young people, the additional support and encouragement they need to fulfill their potential and make going on to higher education a reality. They focus their efforts on some of the most deprived communities in Wales.
- *laith Pawb and Cymru ar lein*: laith Pawb (The National Action Plan for a Bilingual Wales) sets out the WAG priority for sustaining and developing the growth of the Welsh language and the use of Welsh as a medium for learning, working and living.
- *Winning Wales*: This is the national Economic Development Strategy for Wales, set out in 2002 to ensure that Wales's economic prosperity was sustained and developed. Winning Wales is due to be refreshed shortly.
- *ELWa⁴⁷ Priorities*: In *Developing the Workforce⁴⁸*, ELWa acknowledged the need to meet the demands of business and reflect sector learning priorities in order to develop the workforce and learning within the workplace.

ELWa made the following recommendations:

- Provision of free basic skills training for learners with needs up to level 1.
- Implementation of a new integrated, flexible business support service called the Workforce Development Programme to meet employers' specific needs.
- Support customised skills development for SMEs targeted at those which demonstrate most potential.
- Give greater priority to management development and leadership.
- Heighten emphasis on skills for the employed.
- Enhance the employability of the economically inactive.
- Prioritise Welsh language and Welsh medium in workforce development.
- Increase support made directly available for employers over 5 years from £6.5 to £30 million

⁴⁷ It should be noted that ELWa is a former WAG Sponsored Public Body (ASPB) whose functions are now part of the Department for Children, Education and Lifelong Learning and Skills (DCELLS).

⁴⁸ *Developing the Workforce, Learning In and For the Workplace*, ELWa, October 2004.

- Invest more in the Credit and Qualifications Framework for Wales (CQFW), to enable employers / employees to pursue a structured and coherent approach more suited to their needs.
- *Improving Management Development and Leadership*: The Skills and Employment Action Plan for Wales 2005 recommended that ELWa work with the Wales Management Council to develop an improvement plan for management and leadership development incorporating recommendations from its review of workplace learning including:
 - A dedicated budget to develop networks of providers with management development and leadership competence.
 - Developing a delivery model for management training in small and micro businesses including workshops, networks of managers and mentoring support.
 - Ensuring that the CQFW recognises and accredits the full range of management development and leadership learning.
- *Work Based Learning Improvement Plan*: In 2006 the Minister for Education and Lifelong Learning asked ELWa to work with officials in the WAG to prepare an improvement plan for work based learning (WBL), focusing on how awareness of the programmes can be raised, capacity strengthened, quality improved and completion rates increased.

The improvement plan⁴⁹ recommended three areas for development:

- Product development and provision structure.
- Support for individuals and employers.
- Improving quality.

2.6.3. National Language Strategy for Wales

A national language strategy was produced for Wales in 2002.⁵⁰ The strategy aimed to:

- improve the take up and standard of foreign language learning, particularly beyond age 14 and 16.
- increase recognition by schools, pupils and parents of the importance of language learning; and increase recognition by employers of the importance of foreign language skills.
- ensure that foreign language learning builds on the learning of English and Welsh and brings learners to value diversity and gain understanding of other cultures.
- enable Wales to play its part on the world stage and position our country even more firmly in an international context.

The strategy stated that the Welsh Assembly Government would continue to promote language services and training to businesses. Wales Trade International, the

⁴⁹ The Work Based Learning Improvement Plan, Discussion Document, ELWa, March 2006.

⁵⁰ Languages Count 2002 published by the Wales Assembly Government.

international business support department, also recognised the importance of languages to businesses in their overseas activities. In this regard the strategy stated that there would be continuing promotion for the National Languages for Export campaign which has increased companies' awareness of the value of a language strategy in their overseas activities.

Languages Count in Wales is being reviewed at present and the new iteration will have substantially more robust sections concerning skills and the upper reaches of lifelong learning. CILT and CILT Cymru have been involved at every step of the review.

2.7. Summary and conclusions

The Leitch Review of Skills has set the current UK skills agenda by outlining the case for investment in training and up-skilling the workforce. Whilst the review recognised that employers do provide training for their employees, much of this was considered to be unaccredited, with one third of firms providing no training at all.

Leitch also emphasised the importance of improving the skills of those already in the labour market and introduced the possibility of a legal entitlement to workplace training if progress falls short in 2010. This reflects a determination to tackle training and up-skilling across all sectors of the economy.

Other key messages from the review included:

- The need for 'fit for purpose' training provision that delivers the skills that individuals and businesses need. In this regard there is a clear expectation that the delivery of skills must be based on more effectively articulated employer demand.
- Overcoming barriers to training and up-skilling, which particularly constrain employer investment in training low skilled workers
- Ensuring businesses realise the benefits of investment in skill development activities as exemplified in the employer training pilots.

Although the Leitch review of skills set out the challenge faced by the UK if it is to develop a world class skills profile and respond effectively to globalisation, it gave no explicit recognition that improved language and intercultural skills are fundamental to the success of UK plc in competitive international markets. In Europe it is increasingly recognised at national government level, and by the European Commission, that "English is not enough", not just for the UK, but for Ireland and for countries such as Denmark and Poland.

Prior to the publication of the Leitch Review it is clear that within each of the home nations of the UK, there was an underlying and common recognition that the development of skills is key to improving productivity in each nation. Although quite different and distinct policy frameworks exist within each nation of the UK it is clear that all nations consider that better skills are key to improving individual life chances, increasing the flexibility of the labour force and maintaining competitiveness. In particular, it is generally recognised that the increasing pace of technological change requires a flexible and adaptive workforce that is ready to re-skill and re-train to keep pace with the UK economy's skills needs.

There is also a common recognition of the role of learning and work in enabling people to take part in active society and also in providing people with a route out of relative poverty. Considerable emphasis is placed on the importance of basic skills in this regard (literacy, numeracy and basic ICT).

The UK government has emphasised two particular aspects. First, it must be easier for people to climb up the skills ladder, in steps to suit their talents and motivation, from the basics of literacy, language and numeracy through to higher education. Each step in that ladder must equip young people and adults with the skills for employability and give them recognition through qualifications for what they achieve. Second, information, advice and guidance must be widely available for all adults who want it, to help them make sense of what is on offer, and the best way of linking skills, training and jobs.

Across all four nations of the UK there is recognition of the importance of sector skills agreements in providing a clear focus for skills development activities within different sectors of national economies. This is particularly significant because it reflects an appreciation that skills development activities will need to meet the needs of business. Learning priorities to develop the workforce will also need to reflect the needs of business and employers will secure a strong voice in the design and content of vocational qualifications through sector skills councils.

Other common policy threads across the four nations, which have a particular relevance to foreign languages and intercultural skills include:

- Placing an increasing emphasis on skills for the employed.
- Giving priority to management and leadership. In Wales there is a move to recognise and accredit the full range of management development and leadership learning.
- Developing more flexible qualifications and dividing more qualifications into units so that accreditation can be built up more easily. There is also recognition of the need to speed up the accreditation of qualifications and improve the assessment of people's existing skills and knowledge.
- To increase the use of ICT to deliver and assess learning.
- Ensuring that FE and HE seek to meet the needs of employers.

National language strategies were produced for England and Wales in 2002 and in Scotland in 2007.⁵¹ In Northern Ireland a review of language skill needs has been commissioned and is due to be published later in 2008. All the language strategies stressed the importance to the economy of foreign language ability.

⁵¹ Languages for All: Languages for Life, 2002 published by DfES, Languages Count 2002 published by the Wales Assembly Government, A Strategy for Scotland's Languages 2007 published by the Scottish Executive.

3. Competitiveness and productivity

3.1. Introduction

The purpose of this chapter is to highlight the importance of international trade and the continuing trend towards the globalization of business activity and, at the same time emphasise the importance of language as a barrier to international trade. The chapter also seeks to provide an overview of the competitive position of the UK in relation to language skills and set out recent research evidence on the contribution of language skills to UK productivity.

3.2. Importance of international trade

International trade has undoubtedly been a major driver of global growth and prosperity over the last fifty years. World trade has expanded, with exports growing from \$84 billion in 1953 to \$6,272 billion in 2002, making the world today much more economically interdependent than it was fifty years ago⁵².

Government policy has consistently sought to achieve continuing reductions in trade barriers and the expansion of world trade. A recent paper produced by the Treasury in 2004⁵³ indicated that:

- The global benefits from the continued expansion of world trade are potentially substantial. It is estimated that continuing barriers to trade are costing the global economy around \$500 billion a year.
- Both economic theory and countries' experience show that economies which trade more tend to grow faster (chapter 2). Income growth depends importantly on a country's capacity to raise its productivity. Openness to trade – both exports and imports strengthens - the drivers of productivity, by enabling a more efficient allocation of resources; by providing greater opportunities to exploit economies of scale; by exposing the domestic economy to greater competitive pressures; by rewarding innovation and providing access to new technologies; and by increasing incentives for investment. Taken together, these factors mean that openness to trade can play an important role in raising the long-run sustainable rate of productivity growth in the economy.
- Governments have a vital role to play in creating flexibility – equipping their economies to benefit from the dynamic opportunities which openness to trade generates. Investment in education and training enables individuals and firms to respond positively to change. Economic reforms which reduce the regulatory burden on business, encourage competition and promote enterprise and innovation have a strong mutually reinforcing relationship with trade openness.

⁵² Trade and the Global Economy: the role of international trade in productivity, economic reform and growth, HM Treasury, May 2004

⁵³ Trade and the Global Economy: the role of international trade in productivity, economic reform and growth, HM Treasury, May 2004

Whilst the benefits of International trade remains a subject of intense debate among policy-makers and the wider public, the governments' policy appears to be firmly in favour of expanding international trade.

3.3. Language as a barrier to international trade

There is a large body of research that recognises the important contribution of languages in facilitating international trade. Recent research which examined the contribution of language skills to SME exporting and productivity⁵⁴ indicated that the evidence takes a number of forms:

- The boost to international trade stemming from a common language
- From the presence of second language speakers in the domestic population
- From the 'closeness' or ease with which a native language speaker can learn the language of the trading partner.

The report went on to state that:

"Language skills facilitate the experience that identifies prospects in foreign markets and often also that allows them to be exploited. But without knowing those opportunities there is no incentive to undertake the investment. This is the prima facie case that there is insufficient investment in languages."

3.4. Competitive position of the UK economy in relation to language skills

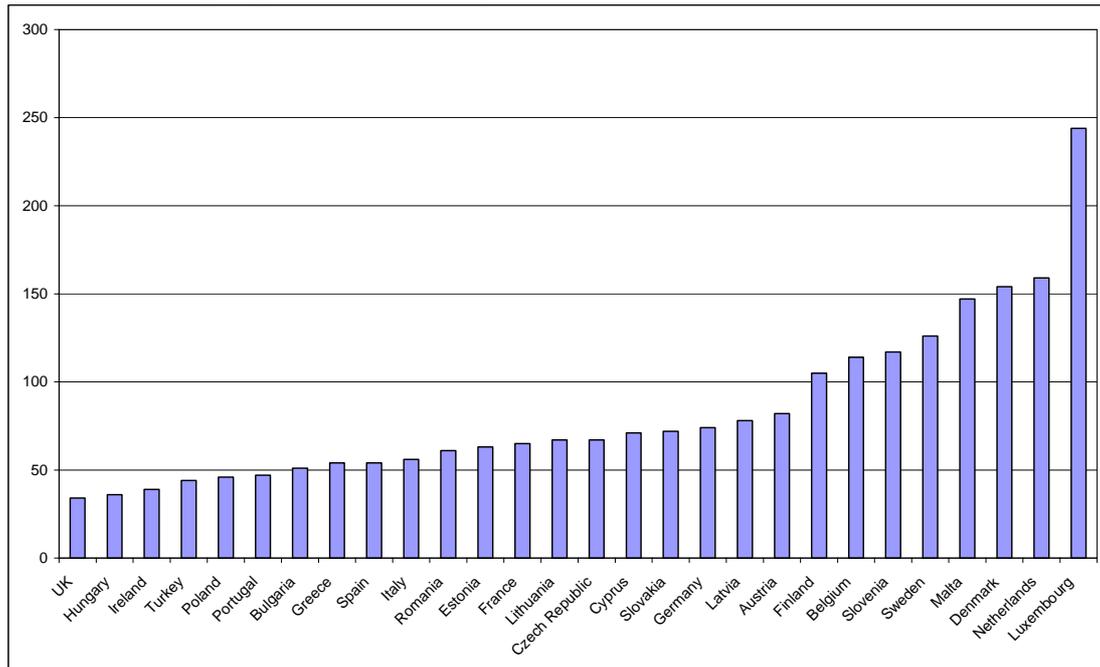
A research study that examined the impact of language skills on the UK economy indicated that the UK is consistently bottom of the European league table in terms of competence in other languages⁵⁵.

Chart 3.1 shows the language skills of people within 28 European countries. The language skills of each European country were assessed by aggregating all non-mother tongue languages spoken in each country into a single percentage score (i.e. the percentage saying they speak French plus the percentage speaking German, etc).

⁵⁴The contribution of language skills to SME exporting and productivity, A report to CILT, March 2007, James Foreman-Peck

⁵⁵Talking World Class, The impact of language skills on the UK economy

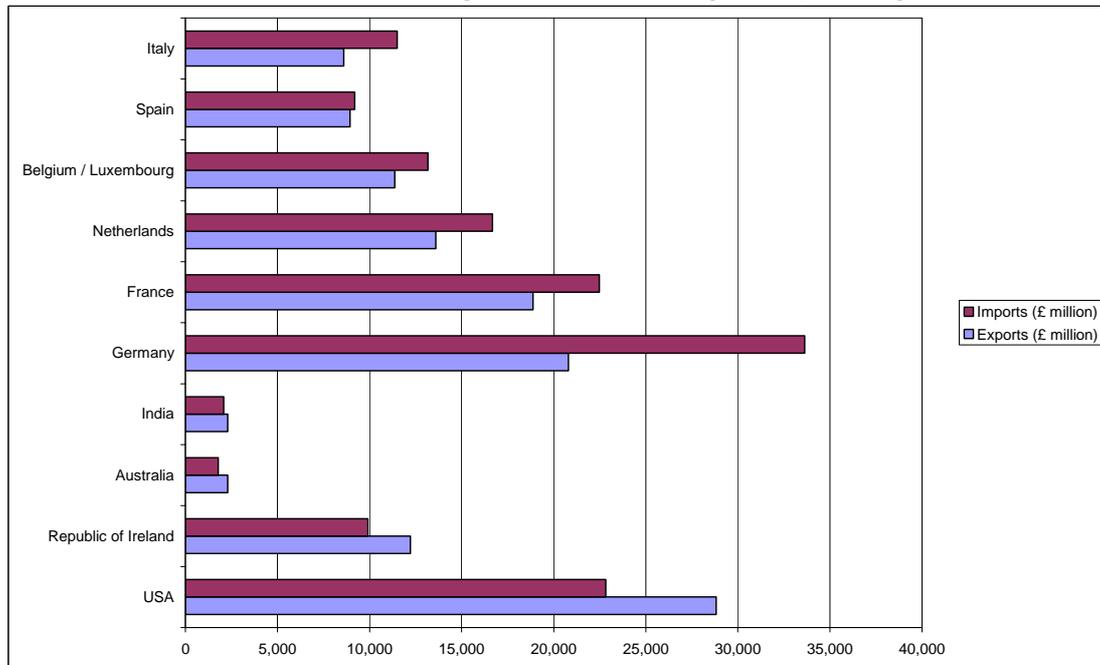
Chart 3.1: Language skills of Europeans in 2006



Source: European Commission Eurobarometer 2006 as published on the Europa website.

Research undertaken by CILT using data from the monthly review of trade undertaken by the National Statistics Office indicates the impact of language on the balance of trade between the UK and English speaking countries on the one hand and non-English speaking countries on the other⁵⁶. Chart 3.2 sets out the results of this research.

Chart 3.2: Trade balance with English and non-English speaking countries



Source: Monthly review of external trade statistics (March 2005), National Statistics Office

⁵⁶ Talking World Class, The impact of language skills on the UK economy (undated)

The research concluded that where English is the language of UK customers the UK is able to export more than it imports. Yet where English is a second language, for example in Germany, France, Spain and Italy, we buy more than we sell. This suggests that communication in the language of our trading partners, whether in person or through third parties, can be one important factor in supporting a trading advantage.

3.5. Productivity

A recent research report commissioned by CILT examined the contribution of language skills to SME exporting and productivity⁵⁷. The main conclusions of the report can be summarised as follows:

- Lack of a common language is a barrier to trade. Overcoming the barrier is costly, but there are widespread benefits from doing so that may warrant public intervention.
- Acquiring language skills absorbs scarce resources (and more resources the later in life the investment takes place). Consequently it is not efficient to expand language investment beyond the point where the gains from the extra trade balance the increase in spending on language skills. There will then remain some adverse language impact on trade, so long as language skills are not free.
- The critical point is that, controlling for the tendency of higher productivity firms to export, in the year that they begin exporting their productivity rises by about one third. As they expand by entering export markets, they become more productive and they absorb resources from less productive enterprises. Since the productivity gains from exporting are so large, and the trade impact of languages is so strong, on any plausible assumptions there must be large returns from effective intervention to improve language skills available to potential exporters.
- Foreign language skills shift the demand conditions faced by the firm, permitting either or both of the following: a higher price for the same volume of sales; and higher volume of sales at the same price, because of the wider market permitted by exports. The downside is that the firm must invest fixed costs in acquiring these skills. For smaller firms these outlays are likely to be a substantial barrier. They will lack sufficiently large turnovers over which they can spread the costs of specialised language skills, and remain profitable. Large firms with many projects in a wide range of markets can better afford to acquire the special expertise or even the information that they need special expertise.
- Both information and indivisibilities of special skills are a source of market failure that warrant public intervention. If firms incorrectly do not see profit opportunities from exploiting language skills, or cannot afford them, then they will not demand them, and private returns – primarily wages – will be lower in the short run. Prospective employees will not invest in languages education sufficiently. This market failure will probably be exacerbated by the complementarity between skills particular to individual firms, such as marketing their products, and general language skills. Each enhances the other's productivity, yet firms may be unwilling to invest in language skills for an employee who may leave before the

⁵⁷ The Contribution of Language Skills to SME Exporting and Productivity, A report to CILT, March 2007, James Foreman-Peck

investment has paid off. These factors all suggest that underinvestment in overcoming the language barrier to exporting may be particularly marked for smaller firms.

- Evidence that the market failure in language skills is substantial is that the impact of a common language on trade is significant for the whole world and significantly larger for Britain.
- The payoff from effective intervention could be large. The best estimate presented in this report is that a common language boosts trade by 38 percent for the whole world. But for the UK the advantage is 58 percent, controlling for other influences on (bilateral) trade. The mirror image of the common language advantage is the handicap imposed upon international trade by language differences. Britain's greater 'common language effect' is consistent with British underinvestment in languages.
- If language skills were as great in Britain as in the rest of the world, so that the barrier is brought down to the world average, British trade would expand very considerably. How much depends upon the extent to which common language trade and trade within the country are reduced, by the diversion of trade. Supposing the proportionate fall in common language countries' trade was the same as the proportionate rise in different language countries' trade, there would be a 7 percent rise in British trade with different language countries. In the bilateral trade data set used in this report, about 70 percent of British trade is with countries lacking a common language. So the postulated improvement in languages generates about a 5 percent expansion of British trade. With exports running at around one quarter of GDP, and responsiveness of productivity to exporting of about one third, the boost to income from the productivity increase could be approximately $(0.05 \times 0.25 \times 0.33 =)$ 0.4 percent of GDP; taking the 2005 GDP figure, this is £4.9 billion.

3.6. Summary and conclusions

International trade has expanded dramatically over the last 50 years and as a result the world today is much more economically interdependent. UK Government policy has consistently sought to achieve further expansion of world trade and continuing reductions in trade barriers on the understanding that an openness to trade can play an important role in raising the long-run sustainable rate of productivity growth in the economy.

There is a large body of evidence that recognises that languages play a fundamental role in facilitating international trade. Although communication in the language of our trading partners is an important factor in supporting a trading advantage, the UK is bottom of the European league table in terms of competence in other languages. Indeed research undertaken by CILT indicates that the market failure of the UK in relation to language skills is very substantial and represents a huge barrier to trade (equivalent to about 5% of all British trade).

If the UK government is to properly equip the UK economy to benefit from the anticipated expansion in future world trade then the evidence suggests that there must be large returns to the UK economy from effective intervention to improve language skills available to potential exporters within SMEs.

There is considerable evidence that large firms that operate in international markets can better afford to acquire the necessary language and intercultural skills.⁵⁸ By contrast SMEs find it much more difficult to overcome language barriers. It therefore follows that intervention to improve the competitiveness of the UK in relation to language skills should be targeted towards SMEs in order that they can both see and exploit market opportunities for international trade.

⁵⁸ See, for example, "Talking Sense", 2006, commissioned by the Learning and Skills Council or the Effects of the European Economy of Shortages of Foreign Language Skills in Enterprise (ELAN), which are covered in Chapter 4 of this report.

4. Language and intercultural skills needs

4.1. Introduction

The purpose of this chapter is to provide a greater insight into the language and intercultural skills needs of businesses in the UK. This has been achieved by utilising the results of recent research undertaken into the use of language and (to a lesser extent) intercultural skills by businesses in the UK since the publication of the Nuffield Report in 2000. The focus of this work has been, in some instances, comparative across the European Union or between specific nations within the EU. In other instances the focus has been UK or regionally directed, involving assessments of employers' use of and attitudes to language skills against the background of individual and national economic/export performance.

It is worth noting that interest in the need for intercultural skills in business has emerged as a research topic relatively recently. This may be explained partly by the impact upon some UK industry sectors and public service bodies of immigration from nations of the enlarged EU and elsewhere and the requirement to deal with the needs of asylum seekers and refugees.

The purpose of this chapter is to summarise the main outcomes from this research which has frequently formed the starting point for more specific, industry-based skills needs research undertaken in collaboration with Sector Skills Councils.

4.2. The Nuffield Inquiry

In 1998 the Nuffield Foundation commissioned an independent Languages Inquiry. The Inquiry considered:

- What capability in languages will the UK need in the next twenty years if it is to fulfill its economic, strategic, social and cultural responsibilities and aims and the aspirations of its citizens?
- To what extent do present policies and arrangements meet these needs?
- What strategic planning and initiatives will be required in the light of the present position?

The Inquiry considered extensive evidence from employer organisations as well as from educational providers, which resulted in a published report on the future foreign language needs of the UK⁵⁹.

The over-riding conclusion was that, at all levels, there was a complacent view – based on the position of English as the world's business language – that “English is enough”.

The report demonstrated that, in terms of personal and social development, social inclusion and emphatically in relation to success in the global economy, assuming that the rest of the world would be happy to communicate with us in English was a potentially catastrophic stance.

⁵⁹ Languages: the next generation. The Nuffield Foundation 2000.

Particularly significant was the evidence from specialists in the international use of English that, as English became increasingly used by those whose first language was not English, so the need for the English to speak other languages themselves actually increased rather than decreased.⁶⁰

Indications from evidence gathered during the Inquiry, supported by more specific research in the following years (see section 4 below) were that complacency about the pre-eminence of English was costing UK plc dearly in terms of lost export business.

4.3. Regional Language Skills Audits

Between 2000 and 2004 language skills audits were commissioned from the then Languages National Training Organisation (LNTO) by the Wales National Assembly Government, Northwest Regional Development Agency, One Northeast, Yorkshire Forward, Advantage West Midlands, East of England Regional Development Agency, and the Southwest of England Regional Development Agency. “Mini audits” were carried out for SEEDA⁶¹ and the East Midlands Regional Development Agency, results for these two regions are not included in any of the following data although the national trends emerging from the full audits formed the basis for employer consultation there.⁶²

The purpose of the research was to provide information for the RDA, business support agencies in the Region and for employers about the use of language and intercultural skills by SMEs, the existence of barriers to successful business arising from inadequate language and intercultural skills, uptake and attitudes to training, future exporting intentions and supply-side data on schools and HE provision of language and intercultural skills in the Region.

Of particular importance for most RDAs was information about language skills within the indigenous population, the offerings of Higher Education within the Region and the linguistic profile of the overseas student population. This intelligence was considered highly significant for the attraction of inward investors and particularly shared service and call centre operations.

4.3.1. Impact of inadequate language skills

The findings from the audits in terms of employer use of and attitudes to language skills, as well as experience of cultural barriers were remarkably consistent across the Wales audit and those in the English Regions. The results which caused most concern were those relating to actual or potential loss of business as a result of failures in international communication.

⁶⁰ Evidence to the Nuffield Inquiry by Prof. David Graddol.

⁶¹ Meeting the global challenge: The economic case for languages in the South East, CILT, The national Centre for Languages 2007

⁶² All Language Skills Capacity Audits carried out for RDAs and Devolved Administrations can be downloaded from the CILT website: www.cilt.org.uk

Table 4.1: Impact of inadequate international communication skills on SMEs

Impact	Wales	North East	North West	Yorkshire and the Humber	East of England	West Midlands	South West
Lost business	19%	19.1%	22.4%	20.4%	25%	21.6%	20%
Experienced language barriers	42%	46%	51%	41%	46%	50%	45%
Experienced cultural barriers	20%	20%	20%	20%	21%	16%	23%
Has a language strategy	8.6%	33%	10.9%	9.5%	10%	14%	9.1%

Source: Figures taken from Regional Language Skills Capacity Audits carried out for RDAs and Devolved Administrations between 2000 and 2004, which can be downloaded from the CILT website: www.cilt.org.uk (Figures show the percentage of respondents answering “yes” to the questions in the first column).

Table 4.1 indicates that, although typically one in five respondents was aware of losing business through inadequate international communication skills, and nearly half were aware of linguistic factors generally interfering with business transactions, only around ten percent of respondents had a conscious strategy for handling communication with clients or suppliers who did not speak English. (The high return for the North East region to this question was attributed at the time to the fact that a pilot survey had been carried out earlier in the Region and had thus sensitised respondents to the issues in the full audit).

This juxtaposition seemed to illustrate, for SMEs, a clear example of the Hogarth and Wilson premise of “latent skills gaps and shortages”⁶³. Findings from other survey questions and later research in “Talking Sense” and “ELAN” (discussed later in this Chapter) reinforced this perception.

4.3.2. Availability of language skills

Responses across the Regions suggested that between 50% and 60% of SMEs used at least one language in their business transactions with over 60% having at least one member of staff with language skills. Table 4.2 shows the typical distribution of language capability within an SME.

Table 4.2: Distribution of language skills in SMEs

Who speaks another language?	% of staff having a language capability
Owner or Managing Director	30
Sales director	16
PA/Admin	12
Sales Manager and sales staff	10

Source: Figures taken from Regional Language Skills Capacity Audits carried out for RDAs and Devolved Administrations between 2000 and 2004, which can be downloaded from the CILT website: www.cilt.org.uk.

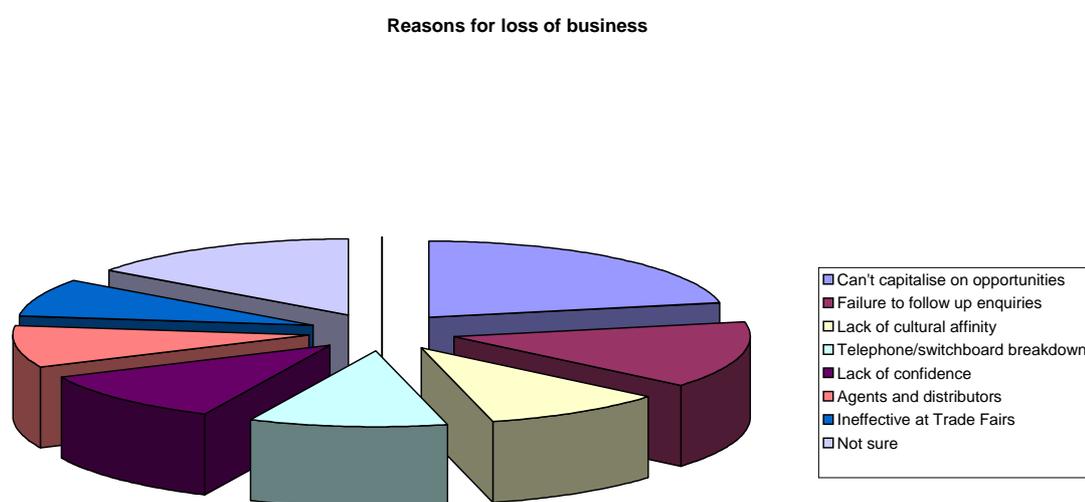
⁶³ Hogarth and Wilson: Skills matter: a synthesis of research on the causes and implications of skills deficiencies. 2001 research undertaken for the SSDA. Latent skills gaps or shortages are recognised only at the point where a business moves into product improvement or diffusion. At this point the change in perception of skills needs can be sudden and radical. Solutions are typically unplanned and unsatisfactory.

This distribution pattern suggested that, in many cases, choice of export focus was determined by the language capability of senior staff in the SME rather than necessarily the regions of the world where business might profitably be pursued. The languages spoken themselves strengthened this assumption, reflecting the traditional distribution of languages taught at secondary level (French 36%, German 28%, Spanish 14% and Italian 6%).

Levels of languages spoken showed 30% claiming fluency or bilingual capability, 16% at degree level, 18% at intermediate or "A" level equivalent and 36% at basic level or GCSE equivalent.

Chart 4.1 highlights the elements of communication failure due to language interference indicated by survey respondents.

Chart 4.1: Reason for loss of business



Source: Figures taken from Regional Language Skills Capacity Audits carried out for RDAs and Devolved Administrations between 2000 and 2004, which can be downloaded from the CILT website: www.cilt.org.uk.

The cultural barriers cited by respondents varied widely in individual importance across the Regional Audits. The following broad categories of interference were given:

- Social behaviour
- Business etiquette
- Business/management style
- Behaviour in meetings
- Issues of time and space
- Negotiations
- Honesty and truthfulness
- Gender discrimination
- Holidays and religious observance

4.3.3. Future intentions

Despite the relatively high proportion of respondents experiencing loss of business or linguistic and cultural interference, Table 4.3 indicates that significant numbers expressed the intention to enter new non English-speaking markets in the future. With three exceptions, the numbers intending to undertake training to support such activity fell short of the numbers planning expansion. Whilst in some areas (Wales) the level of demand for languages such as Japanese and Chinese was significant at 19%, the preferred languages for future training remained French, German and Spanish. This almost certainly reflects deep-seated perceptions about the practicalities/availability of training in more exotic languages and the role of English as a world lingua franca. It should also be noted that these audits pre-date the recent expansion of the European Union.

Table 4.3: Future trading and training intentions

Future intentions	Wales	North East	North West	Yorkshire and the Humber	East of England	West Midlands	South West
Intend to enter new markets	41.6	53	44.2	47	43.5	34.7	35.5
Intend to train in lang. skills	39.4	34.3	37.6	33.5	33.0	36.5	34.0

(% of respondents answering "yes" to question in first column)

Source: Figures taken from Regional Language Skills Capacity Audits carried out for RDAs and Devolved Administrations between 2000 and 2004, which can be downloaded from the CILT website: www.cilt.org.uk

4.4. National Employer Skills Survey (NESS)

Foreign languages are one of the thirteen skill categories used in the questionnaire for the NESS. Intercultural skills are not captured in these surveys but need for this skill may be present within the responses to foreign languages and/or communication (where there is an obvious possibility of overlap in relation to communication skills of workers whose first language is not English).

Data from the 2003 and 2005 NESS returns suggests that, although foreign language skills shortages have historically not figured strongly in reported shortages, (the "latent skills argument" may be at work here), there has been an increase both in employer perceptions of shortages and skills gaps between 2003 and 2005. Table 4.4 compares the two surveys.

Awareness of shortages has nearly doubled and is particularly noticeable in the occupational area of skilled trades, where the increase is nearly fourfold. This increase would be worthy of further investigation, but one possibility is that the increase in immigrant and migrant labour (especially in the construction related industries) with concomitant communication problems, may have skewed the responses under foreign languages.

Table 4.4: Changes in reporting of foreign language skills shortages and gaps.

Occupation	Shortage 2003	Gap 2003	Shortage 2005	Gap 2005
Manager	6	7	13	13
Professional	11	7	11	5
Associate Professional	11	8	9	4
Administration	8	7	13	7
Skilled trades	6	8	23	6
Personal services	5	9	17	13
Sales	7	6	7	8
Operatives	3	6	11	12
Elementary	8	9	14	11
Average	7	7	13	9

Source: National Employer Skills Survey (NESS) 2003 & 2005.

Of further interest is that, when analysed by region, the East of England at 15% is significantly higher than the average of 9%. East Midlands (10%), London (12%) and the Northwest (10%) are the other regions scoring above average. Here, again, it is possible that the East of England return has been affected by ESOL needs of migrant labour in the agricultural sector.

4.5. Effects on the European Economy of Shortages of Foreign Language Skills in Enterprise (ELAN)

The ELAN research project which reported in February 2007, involved 2000 exporting SMEs across 29 member or aspirant member states of the EU who completed a questionnaire similar to that used for the Regional Language audits in the UK⁶⁴. In addition, in order to establish a basis for comparison between SME attitudes and practices and those of large companies, 30 multinationals based in France, Germany and the UK completed a questionnaire adapted from the "Talking Sense" survey (see below).

Although the sample size for the UK within this research was small and the impact of English as a lingua franca on results from SMEs in mainland Europe needs to be factored in, the impression gained from this part of the survey is one of complacency or lack of ambition on the part of UK businesses when compared with their EU counterparts.

Table 4.5 highlights key comparisons from the ELAN survey and shows that UK respondents differing significantly from their European counterparts in respect of language strategies, acquiring staff with language skills, employing external language professionals, adapting their website and contemplating new markets. (Although the latter figure at 11% is significantly lower than the average over the Regional Language Audits at 38.5%).

⁶⁴ Commissioned by the EC Directorate General for Education and Culture as part of a benchmarking exercise within the EU's policy on multilingualism. The project was managed by CILT, the National Centre for Languages with research undertaken by InterAct International supported by a team of additional researchers across the European states.

Table 4.5: Key comparisons from the ELAN survey (Figures are percentage of respondents answering affirmatively)

Questions: Yes/No	UK	Spain	Portugal	Italy	Belgium	Luxembourg	Sweden	Slovakia	Bulgaria
Communication / Language strategy	3	44	93	55	55	48	27	36	67
Choice of market influenced by staff language skills	4	25	25	7	18	0	6	13	18
Acquired staff with language skills due to export needs	15	25	48	28	62	52	42	32	44
Employed native speakers	16	26	9	19	28	32	32	20	7
Employed local agents	29	33	26	32	31	23	46	16	39
Employed translators etc	15	52	18	39	57	25	59	36	40
Adapted website	5	66	44	61	77	69	77	64	84
Missed contract: lack of language skills	6	13	3	8	9	5	20	2	10
Plans for new export markets	11	75	52	39	42	23	47	31	80

Source: ELAN: Effects on the European Economy of Shortages of Foreign Language Skills in Enterprise, December 2006.

Table 4.6 highlights further comparison from the ELAN survey that shows a similar pattern, again with some caveat over the very low return from the UK sample. It is, however, striking to note the percentage size of the difference in most question categories between UK respondents and those from the EU sample. Only in respect of record keeping about staff skills does the UK out-perform the field.

Table 4.6: Key comparisons from ELAN survey (Figures are percentage of respondents answering affirmatively)

Question	UK	Spain	Portugal	Sweden	Slovakia
Export market based on language skills	1	10	14	5	11
Cultural problems	11	14	5	37	17
Missed contract: cultural reasons	1	5	2	12	5
Keeps record of language skills	62	43	82	43	53
Offered language training to staff	16	56	55	70	84
Language training in the last 3 years	10	61	44	43	57
Need additional language skills	4	63	44	43	34
Need additional cultural skills	1	16	13	12	9

Source: ELAN: Effects on the European Economy of Shortages of Foreign Language Skills in Enterprise, December 2006.

Other results from the ELAN survey of significance for skills needs research in the UK were:

- A preference for recruiting the finished article (as opposed to training/capacity building) was apparent within the EU sample as it had been in the UK Regional Language Audits (22% of respondents recruit native speakers)
- Although English was frequently cited as a lingua franca by EU respondents and therefore figured highly in the rankings of languages needed by SMEs, Russian, German, French and Spanish were all mentioned as *linguae francae*, with Russian and German growing in importance following the expansion of the European Union.

With regard to the large company section of the research (see also “Talking Sense” below) outcomes of interest in relation to skills needs were:

- 73% of respondents had an established scheme for recruiting language-skilled employees.
- Demand for skills in languages other than English was greater than the demand for English itself.
- “Relationship-building” is seen as a vital business activity, both between the company and its customers as well as within the workforce. Linguistic and intercultural skills are increasingly valued both as “front-line” and as “added-value” skills.
- 66% of large companies had trained staff in intercultural skills. 44% engaged in regular intercultural training. To an extent, this can be accounted for by the multi-national make-up of global businesses and the resultant need to promote acceptable standards for staff interaction. (One multinational had made it a rule that UK staff visiting sites in the US should receive cross-cultural training to offset any tendency to assume that the same language meant the same business and social values).

4.6. “Talking Sense” (2006)⁶⁵

The research comprised two sections:

- A comparative study involving a telephone survey of 50 multinational companies in each of the UK, France and Germany and
- A review of best practice in language management involving six multinationals based in England.

⁶⁵ The study was commissioned by the National Learning and Skills Council as part of its support for the Government’s national strategy for languages set out in its publication “Languages for All, Languages for Life”. The report can be downloaded from the CILT website.

The results of the comparative survey were not dissimilar from those of the ELAN study, in that the UK based companies, although they believed they were as well-prepared in terms of language capacity as their French and German counterparts, were seen to be much less responsive to the language needs of their business partners, were less likely to include international communication in their strategic planning process and were less agile in their use of language management tools. In relation to business language skills the research indicated that:

- Demand for language skills among UK companies did exist but was found to be still largely latent.
- UK companies were not as willing as their continental competitors to trade in their client's language.
- The survey underlined the fact that economic factors foster a climate in the UK in which companies operate short-term in respect of skills capacity-building generally. The at times unpredictable nature of changing international markets, and therefore changing need for different languages, is an exacerbated aspect of that generic issue.
- 75% of UK companies, along with 75% of French and German companies, recognise a need to improve their capacity in one or more languages to support future business development strategies. But UK companies seem less well placed than their continental competitors to make effective use of the languages of emerging economies (e.g. Spanish, Arabic, Chinese).
- The principle of building capacity to trade in language(s) other than their own appears better established on the continent than in the UK. UK companies seem to prefer to meet their language skills needs through recruitment rather than training. This means that UK major company HR departments are looking for potential employees with language skills as part of their portfolio.
- A recruit with language skills in their portfolio is clearly valued over one without.
- UK labour market entrants, at whatever level but particularly at graduate/postgraduate level, without additional language skills, appear to be at a disadvantage in what has become a global employment market. The UK would thus appear to be increasingly under-represented in the elite labour market (e.g. graduate fast-track programmes).
- Major companies, which saw the existence of a diverse and varied language-skilled population as a factor in locating to the UK, were looking now to ensure succession planning for language skills to cater for routine staff turnover. Comments from respondents to the study suggested that there was concern about the continued availability of those skills in the UK.

The section of the study dealing with good practice in UK companies found that, in all the companies interviewed, there was a strong awareness of the value of intercultural skills. All six companies trained staff in cultural awareness. Two of the six incorporated into this training the notion of 'de-centring', i.e. examining how one might be perceived by others as a means of arriving at how one might better understand others.

The original motivation for cultural awareness training sprang from the external side of relationship building. However, there was growing evidence that its value was now being recognised as a tool for internal relationship building. Although the applications of intercultural training in this part of the study related to harmonisation of working relationships at relatively senior levels in the business, other studies have highlighted its potential value in managing workforces with high levels of cultural and linguistic diversity. (c.f. *Heathrow: Talking to the World*, and *Communication needs in the Construction Industry*).⁶⁶

A further finding emerging from the good practice studies was that of a “wash back effect” from the presence of a multilingual staff. It was pointed out that, with staff and existing or potential clients contacting main offices from various parts of the world, switchboard staff and administrative support staff had, of themselves, recognised the value of having some capability in languages so that the company’s ethos of being a friendly and helpful organisation could be reflected at all layers of the organisation.

A related approach was seen in the automotive engineering sector, where company policy encouraged informal networking and brainstorming across departmental and plant boundaries. This brought with it an unwritten requirement for capability and flexibility in language use.

4.7. Heathrow: Talking to the World (2005)

The study examined a range of on-airport workstreams to identify current and future language and cultural skills needs and thus to inform London West LSC and employers at Heathrow of training required to meet skills gaps and shortages.

A total of 150 staff were interviewed from occupations in air-side retail and catering, cleaning and land-side facilities, baggage-handling and check-in.

An immediate realisation from the study was that the multilingual make-up of Heathrow’s workforce represented a challenge as well as a significant opportunity.

The challenge:

- Effectively managing the supervision of staff groupings with a range of first languages and with varying levels of competence in English.
- Ensuring that job training and health and safety requirements were understood.
- Facilitating a continuing flow of interest in employment from the ethnic groups living in boroughs neighbouring Heathrow.

The opportunities:

- An existing pool of language capability – within the group of 150 staff interviewed there were 27 different first languages and 45 languages spoken
- A willingness to use languages to support the passenger experience even though this was not formally part of the job –“anybody wearing a yellow jacket is seen as a walking information point”.

⁶⁶ Heathrow: Talking to the World a study of international communication needs and practice at Heathrow Airport for London West LSC (CILT 2005). Communication Needs in the Construction Industry a study by the Schellekens Consultancy for CILT and funded by London Central LSC and CITB (2005)

- Over 50% of interviewees wished to learn more languages to enable them to be even more responsive to customer needs. This included sign language, French, German, Spanish, Italian, Japanese and Arabic. (Only 17% within this category included ESOL).
- There was an awareness of the potential cultural pitfalls associated with personal space, touching, eye contact and a desire for more formal training in cultural awareness.

Recommendations therefore included:

- Training for supervisors in communicating with a multilingual workforce.
- A review of written and on-line training materials.
- Employers to examine the cost-benefit equation of providing “drop-in” language learning points for staff – including sign language and cultural awareness.
- Establishing a database of staff language capacity irrespective of job function.

4.8. The Impact of Foreign Languages on British Business⁶⁷

The research was undertaken in two sections. The first section consisted of a series of interviews with senior export staff whilst the second, quantitative section reviewed responses from a wider number of business respondents.

The qualitative report identified four behavioral types:

- Opportunist: responding to approaches as received without actually seeking markets.
- Developer: prepared to adapt product or service to export market but still reactive, using English and not translating literature.
- Adaptor: making an effort to adjust to the export market and seeking new business, with sales material in the appropriate languages.
- Enabler: proactive with strategic focus and placing great importance on having staff with language skills.

Although most interviewees regretted the poor showing of UK business people in languages and cultural awareness, this was tempered by broader observations.

Thus:

- Language was felt to be only one of many factors which had to be considered when thinking of new markets.
- Whatever one feels about the need for language skills, English is nevertheless the world business language.
- Because of this many overseas companies employ English speakers in order to do business with the rest of the world.
- Respondents questioned the practicality of learning languages because of the breadth of the markets covered.

⁶⁷ British Chambers of Commerce published in two parts 2003 and 2004.

- The quantitative review, however, produced strong feelings in favour of language skills as well as persuasive economic arguments.
- One half of English exporters have a formal qualification in a foreign language.
- However, 80% of English exporters cannot competently conduct business dealings overseas in even one foreign language.
- Those who learnt languages at primary school are more likely to claim they can conduct business dealings in a foreign language than those who did not.
- Although language competence and qualifications at GCSE/O level do not differ across the segments, the more successful segments are significantly more likely to place importance upon their staff having language skills.
- Those who have lived overseas are equally likely to claim competence to do business in a foreign language.
- Nearly two-thirds of all exporters (63%) have no formal strategy to maintain or instigate trade with foreign speaking businesses.
- There is a direct correlation between the value an exporter places on language skills within their business and their annual turnover.
- Only 33% of Opportunists have an annual export turnover above £1/2 million. This increases to 54% for Developers, 67% for Adapters and 77% for Enablers, who place the most value on language skills within their business.
- Opportunists' (the segment that least values language skills) export sales are declining by an average of £50,000 a year per exporter, while Enablers' (the segment placing the highest value on language skills) exports are increasing by an average of £290,000 a year per exporter.

4.9. Employer consultation on standards for intercultural working

Focus groups and questionnaire consultation with employers and representatives of Sector Skills Councils took place during 2006 and 2007 to assist the design of National Occupational Standards for intercultural skills⁶⁸.

It will have been noted from language audits and surveys referred to in this section that the articulation of needs, shortages and gaps in intercultural skills is often conflated under "language" or "foreign language skills".

Demand for intercultural and cross-cultural skills has been present, but its expression in skills surveys muted.

In part, this may stem from the term's absence from standard occupational skills questionnaires.

⁶⁸ Consultation Report July 2007: J.P.O'Regan and M.N.MacDonald for CILT, The National Centre for Languages

What is clear from employer reaction and Skills Needs Assessments is that the significant numbers of asylum seekers and more recently immigrant and migrant workers mainly from eastern Europe but also from further afield, has brought the issue of managing the multilingual/multicultural workforce to the forefront of many employers' skills needs awareness.

In response to this, CILT the National Centre for Languages was commissioned to develop a suite of NOS in Intercultural Working. The draft Standards are currently at the final consultation stage.

During consultation, employers' responses pointed to skills gaps, rather than shortages. Existing managers and supervisors needed the additional skills of intercultural working whilst highly valued immigrant workers would, employers felt, integrate more easily into the work and social community if they acquired some intercultural skills.

Employers noted the following gains to their business effectiveness from the introduction of intercultural skills:

- Better team working
- Improved front-line staff and management skills
- Improving poor working atmospheres
- Avoiding tribunal proceedings
- Improving customer relationships
- Improving project performance

It is worth noting that, when the focus of consultation was moved towards external trade, employer responses tended to minimize the importance of intercultural skills in favour of language skills. This might be felt to reflect the generally low level of sensitivity of UK employers to the process of international communication which has been noted in other research summarized in this report.

The responses to the NOS consultation are mirrored in employer comment from a survey of business need for language and intercultural skills in the West Midlands carried out in 2006.

Examining particularly responses from the Food and Drink manufacturing sector researchers found that, although around 70% of respondents maintained that their company's foreign language and intercultural skills were adequate for their purposes, 68% said they needed help in developing their staff's language skills and providing cultural support materials.

Clearly, then, this second response dealt with the management of a multilingual workforce and not with external representation of the business.⁶⁹

⁶⁹ An assessment of employer demand for foreign language and cross cultural skills in West Midland businesses: Regional Language Network WM and Coventry University 2006

4.10. Graduate Skills and Recruitment in the City⁷⁰

The survey consulted 25 companies in the financial sector, together with 10 Higher Education Institutions.

In relation to language and intercultural skills, survey respondents, both within the financial services employer group and from the HEIs were at the same time adamant about the importance of language and intercultural skills and critical of the qualitative and quantitative levels of language-skilled applicants available through the UK higher education system. Thus:

“Employers are increasingly demanding a wider degree of cultural understanding in response to the challenges of operating in an increasingly-integrated Europe and a globalising business environment in which advanced communication and information technology is bringing markets closer together. Language skills are therefore often a prized commodity. Both large firms and SME employers recruit graduates with foreign language skills in pursuit of business advantage and potentially flexible human capital investment. Employers often explicitly seek to match their firm’s evergrowing international client base. While employing a UK graduate with a foreign language skill is highly desirable, this is not always sufficient, as firms are seeking not just a command of the language itself, but also a high degree of country-specific cultural awareness.”

and

“The 2002 Guardian/AGR graduate employers survey examined the main drivers behind increased UK graduate recruiting in continental Europe. The two principal reasons given were: expanding the diversity of a company’s workforce and obtaining foreign language skills. Survey respondents ranked these factors as more important than maturity or academic ability.”

4.11. Skills needed to improve the visitor experience and sports presentation for London 2012⁷¹

The SSCs involved were Creative and Cultural, *GoSkills*, Lifelong Learning, People 1st, *SkillsActive* and *Skillsmart Retail*.

Each SSC identified a list of trades or occupations likely to be involved in support of the 2012 Games.

Ten employers from each SSC were interviewed in depth about their perceived skills requirements.

All SSCs’ customer-facing roles were identified as benefiting from the additional skills of cultural awareness and foreign languages. In some cases it was suggested that the resource available within London’s linguistically diverse population should be systematically tapped.

⁷⁰ Research carried out by Alpha Generation Financial Training, supported by the Careers Group of Landon University and FreshMinds, published by the Financial Services Skills Council and the City of London (2006)

⁷¹ Research carried out under the auspices of the SSDA by six SSCs to identify skills shortages and gaps in the run-up to London 2012.

Of a total of 26 roles or occupations listed by the six SSCs, sixteen registered as benefiting from the availability of language skills with approximately the same number requiring intercultural skills. “Language and cultural skills need to be enhanced because of the sheer scale of the event and user profile” (*GoSkills*).

Tourist guides reported substantial gaps in coverage of some languages. Only four “blue badge guides” had been trained in Mandarin in the previous five years.

4.12. North West Study and Strategy on Embedding Languages in Key Sectors⁷²

The Northwest RDA with its partners has established 23 Sector Skills Partnership Alliances (SSPAs) including one for Languages.

Working with the Food and Drink SSPA the Regional Language Network Northwest has completed a pilot study of skill needs in that sector.

Researchers used as a basis for their methodology the “Specialist Workforce Plan” developed by CILT, the National Centre for Languages for the Skills for Business Network in 2005 and further refined in 2007.

Skills issues confronting the sector in the Northwest centred around the effective management of a multicultural workforce – within the sample of six businesses involved in the pilot 21 nationalities were present.

Among outcomes from the pilot the following are of particular note in the context of this report.

- Managers requesting intercultural training.
- Managers requesting training in Polish and Russian
- Training/briefing for co-workers who are asked regularly to act as “informal” interpreters.
- Pooling of resource across the sector in the NW to produce translations of generic handbooks on hygiene, cross-contamination etc.
- Similar pooling to produce “community integration” toolkits.

This particular development in the Northwest is further worth note as it is likely to form a template for similar work with other Sector Skills Partnership Alliances. Hospitality and Tourism is about to be published and two further studies are at the planning stage.

4.13. Other language skills research reports

It is appropriate at this point to note the findings on language and intercultural skills of two further reports: the Langlands Report: “Gateways to the Professions”⁷³ and the London Business Survey⁷⁴

⁷² A study by the Regional Language Network Northwest funded by Northwest LSC (2007)

⁷³ A report commissioned by the Department for Education and Skills examining the relationship between higher education outcomes and the skills needs of the professions.(2005)

⁷⁴ 4th London Business Survey CBI (Dec 2006)

The Langlands report noted that a university degree on its own does not confer fitness to practise, for example in translation. Stronger links between universities and the language professions were advocated.

Closure of language departments in universities would lead to shortages of linguists in the future.

The report noted competition with graduates from EU and non-EU countries who were able to offer not only their own language and English but also a mainstream skill such as law or accountancy.

The report also called for minimum skills standards to be established for linguists working in the public services.

The London Business Survey registered 94% of respondents believing that language skills were important for the London economy.

Concern was expressed at the decline in the number of schoolchildren opting for languages post 14.

4.14. Conclusions

The Nuffield report in 2000 clearly indicated that UK business held a complacent view of the importance of languages based on the position of English as the world's business language and that the UK needed to dramatically develop its capability in language skills if it was to continue to be successful in the global economy. Since the publication of the Nuffield report a number of studies have also pointed to different aspects of the UK's deficit in the use of languages and intercultural skills by business.

Surveys have demonstrated that UK business performs relatively poorly compared to their European counterparts in respect of language strategies, acquiring staff with language skills, employing external language professionals, developing their websites and contemplating new markets. A range of such latent skills gaps and shortages in relation to foreign languages are interfering with business transactions and leading to loss of business.

Although starting from a relatively low base, there is also evidence that there has been an increase in employer perceptions of skills shortages and skills gaps.

There is evidence that large and multinational companies in the UK have better developed language capacity although the Talking Sense survey did indicate that such companies were less responsive to the language needs of their business partners, were less likely to include international communication in their strategic planning process and were less agile in their use of language management tools than their French and German counterparts.

The Regional Language Skills Audits highlighted the dramatic impact of language skills shortages and gaps on actual or potential loss of business within different regions and nations of the UK. What is clear from the research conducted in relation to SMEs is that:

- Exporting SMEs would be more successful if they made greater and more planned use of language skills.

- By definition, SMEs lack the resource base of large enterprises and are thus less able to engage in capacity building activity where return on investment may be uncertain both in timescale and value.
- Interventions are desirable on the part of business support agencies to maximise opportunities, promote good practice and co-ordinate initiatives.

The articulation of needs, shortages and gaps in intercultural skills is often confused with 'language' or 'foreign language skills'. However, it is apparent that employers are increasingly demanding a wider degree of cultural understanding in response to the challenges of operating in an increasingly-integrated Europe and a globalising business environment.

The need to manage multilingual/multicultural workforce has also been a challenge to many employers as a result of recent immigrant and migrant workers mainly from Eastern Europe but also from further afield. Existing managers and supervisors needed the additional skills of intercultural working whilst highly valued immigrant workers would, employers felt, integrate more easily into the work and social community if they acquired some intercultural skills. Whilst the multilingual make-up of the UK's workforce represents a management challenge it also clearly represents a significant opportunity for the UK in terms of language capability.

5. Employers' views

5.1. Background information on employers interviewed

5.1.1. Sectors represented

The employers interviewed were identified in conjunction with CILT and were selected to provide views from a wide range of sectors including manufacturing, pharmaceutical, marketing, automotive, facilities management, recruitment, service, transport, recycling and the public sector.

5.1.2. Significant languages

The majority of employers cited European languages as significant in day to day business, namely French, German and Spanish. Less commonly used, but still significant European languages are Swedish, Greek, Italian, Polish, Dutch, Finish and Flemish. Many also stated the frequent use of Chinese Mandarin, Russian, South American (Spanish and Portuguese) and South East Asian languages including Japanese and Korean. There is also some need for Arabic, Farsi and Indian sub-continent languages to a lesser extent. Nearly all of those interviewed named at least three foreign languages as being significant in day to day business.

Very few companies tend to get by with only rarely using any foreign language skills. What was also commonly noted, was that even where most day to day business is carried out in English, foreign language skills can be useful:

“Although the language of (name of organisation) is English for business meetings... well sometimes you do need some facility in one of the other languages because not everybody is obviously fluent in English.”

5.1.3. Size and scope of organisations

The size of the organisations ranged from directly employing very small numbers, through to SMEs and then to multinationals, again to obtain a cross section of opinions. All but one operates internationally and deals with clients or customers from different countries and/or cultures; even a small company employing 24 people is currently running a marketing campaign in around 30 countries and a 'Global organisation' sees itself as operating in every country, with only five per cent of sales in the UK.

Without exception, the employers employ a multicultural/ multilingual workforce; one large company employs people from 50 different ethnic origins and the interviewee commented:

“You won't come across a more diverse industry than this one.”

5.1.4. Proportion of staff with foreign language skills

Only a minority of the interviewees actually knew how many of the employees in their organisation have foreign language skills:

"I am not sure I could tell you the proportion of employee who speaks a foreign language off the top of my head that will quite a difficult thing to say. I mean obviously we do have a number of people who are native speakers, those who have a community language who are actually not working as linguists and not employed as linguists, but I couldn't give you exact figures for that."

"I'm unsure what proportion speaks a foreign language. What I can tell you is we have of the British nationals a tiny number speak another language. We have a significant number of foreign nationals all of whom will speak their native language and English and number of them will speak more than one other language."

Of the four respondents who knew, the proportion ranged from 10 per cent to two thirds of the workforce:

"In my particular part of the business, which is engineering which accommodates just under 2,000 people, we are a graduate organisation and I would be probably guess that 60% probably have some facility in another language which isn't necessarily used but its part of somebody's capability that we look at when we are interviewing them for employment."

"There are 24 employees here who shall we say 16 speak more than 2 languages, a range of different languages. We basically look for language graduates and we can then teach marketing to them".

5.1.5. Growth plans

Not many of those spoken to were aware of any intention of their organisation to trade in new, non-English speaking markets in the near future, often because the decision was not theirs, or because they felt that they had a presence across the world already. A small manufacturing employer emphasised the Far East as an area which is increasing in importance in terms of purchasing, while a larger employer is opening an office in India within a few months and is also investigating the possibility of expanding into South America. Both of organisations will probably require new language skills due to these plans.

5.2. Current and future language skill needs

5.2.1. Job roles in which ability to communicate in a foreign language is most needed

In nearly all of the organisations, except for the public sector organisation which employs around 250 linguists (as well as analysts who also require foreign language skills), most job roles needing this ability are on the sales and purchasing side, business development and customer service areas, often at the level of middle management and above:

"Particularly in our business team, including job titles such as business development, direct services development manager and business director, business manager, business coordinator, talking in numbers or percentage of the workforce, fairly small I believe, I think it's probably less than 5 %."

Many interviewees also commented on the fact that in many roles, foreign language ability may be very useful, even if not necessarily essential:

“At the professional and managerial level position and also in sort of purchasing, buying types, type roles and we’ve got a number of employees that do speak French predominantly in the sort of head office area... certainly within the head office area I would probably say that probably more likely sort of 50% that speak some level needed to fit their job role. It varies, there are some job roles that it helps if you can speak French but you can do without and there are other job roles that it is essential. The essential ones are areas such as IT, finance, purchasing, those areas within head office.”

“Are you talking about essential to the job?...then probably not because in one of those bizarre twists of fate, aviation’s international language of course is English, but where it would be advantageous, there are quite a few...the business development roles and the customer services roles all require, well all would be better off with a language.”

“A friend of mine for instance is Chinese and he works in procurement because we have a lot of business with Chinese, they make a lot of stuff for us, and they will eventually make all aircrafts. Now whether he was recruited because he was Chinese, I don’t know but I suspect that had lot to do with that.”

5.2.2. Recruitment of people with foreign language skills

There were mixed views on the actual importance of language skills compared to other competencies required for jobs, though it was stated by several interviewees, that foreign language capability would always be viewed positively, and could well be the deciding factor between two candidates:

“It’s practically very difficult indeed because besides having somebody with foreign language skills, we also need somebody who thinks on their feet, and be effective in other areas. We, as a small company, don’t employ someone just because he can speak a foreign language. To assess them, when we interview people, we ask if they have got a foreign language skill and it’s always a benefit to have one. Well English is the main commercial language of the world and everybody thinks it’s not all that important to have any other language than English, but it is!”

For others, foreign language skills are extremely important, and the most often highlighted methods of recruitment included going through specialist recruitment agencies and targeting specific (often the more vocational) university courses:

“We use a variety of methods really; we advertise in the national press, we attend the language fairs for example, we were at the language show at Olympia last year, but we also target specific universities that offer the languages in which we are interested, the more vocationally focused courses, that is definitely important for us. We prefer the courses that include some time spent living abroad... we do prefer that they have had some in-country experience certainly before they come here.”

“We generally go to recruitment agencies and we also for example, use local, international recruiters obviously to focus on a skill set and we also use the job board which is an internet posting and internally we have our own website for all recruitment activity. It all depends on the role and also sometimes...you know the markets are quite buoyant with language capability, other times we seem to have quite a struggle to find it, but generally there is no preferred method.”

There was evidence that some organisations find that it is more cost effective to ‘buy in’ foreign language skills by recruiting native speakers (whether they are UK based or not), while others feel it more important to recruit someone with English as their mother tongue, depending on the role:

“We are a global, company which means we fish in a global talent pool for any middle management level and above, therefore mobility and international mobility is important to us, with the ability to speak in a another language being important to us. So what we would say is somebody needs to be an expert in their particular skill area, to have a language capability and also good leadership capabilities in addition to that. That’s what we would be looking for in a new recruit, and therefore we would, on occasions go for a non-Brit rather than a Brit, if they have more language and better ability to be mobile in future.”

“We recruit language graduates, they are generally UK graduates because a significant element of their role is copy writing and really it’s extraordinarily difficult to write in anything other than your mother tongue, so pretty well everybody has English as the mother tongue with second and third languages. We have relations with a number of recruitment agencies and we work with them and also with a couple of language departments in universities. Recruitment Agencies know us quite well after about 20 years, so when they spot a graduate that’s bright and can write and knows languages they tend to contact us and say, you know this person is around are you interested?”

“We tend to recruit through our trainee programmes, through our graduate and trainee schemes and we tend to specify A Level in the French language, A level for a starting point. Everything else is a bonus and then we have sort of internal training programme... It depends upon the sort of job role; if it was sort of fundamental and we were recruiting someone for that then we would do sort of a language test.”

For some, a specific strategy has not been chosen; one small company typically employs foreigners for language skills, though this was seen as *“not necessarily the best way, it is just what tends to happen.”*

Another commented on ‘serendipity’ being involved and others looked for ‘word of mouth’ of suitable candidates:

“I would probably talk to people that I know, ask them if they knew anybody Japanese, get an intro and then have a conversation with them and then see what came off that and so it would be a network approach rather than a sort of an advert approach”.

A clear message was that the vast majority of employers are far more interested in recruiting people who can demonstrate evidence, other than through the acquisition of a qualification, of language ability:

“If everything else is equal, it would be the deciding factor if this is middle and senior leadership roles. We look at the practical use of language, that is what matters to us. So if somebody has lived in the country, they have the use of working language... We would be basically not looking at a qualification. We would be looking at mileage in the language. “

“Let’s say we are not really desperately interested in text book languages!”

5.2.3. Recent changes in the need for foreign language skills

It is apparent that the need for foreign language skills in many organisations has increased over recent years, often linked to an increase in global markets. The vast majority of employers saw their changing needs as being representative of other organisations within their sector:

“The more global you are... the more the work the more the workforce globalizes; the greater the importance of language capability as part of a standard skill set if you like.”

“The need to take in consideration any foreign language is more important today than ever before because we are in the global market and we have to realize it. It's in all of the industry, all of manufacturing industry, anybody involved in international trade would be in the same boat as well as my industry.”

“It has because now we are moving far more quickly into international markets and I think we have also come to the realization in the business that we can no longer expect people to do business in English with us... I think it's the realization...we are sort of moving the arrogance of the British I think and also a lot of documentation that we use in terms of contracts, documentation its very, very lengthy and very contractual and I think we miss the nuances if we are having it translated. There are a lot of subtleties in obviously every language and if you are not competent in it then you really can miss them.”

“I actually think they are getting more and more important even though more and more people speak English. My view of language skills is that your ability in the language... is less important than your ability to have a go and make that cultural bridge.”

A few thought that the need had remained fairly constant:

“I think the need is the same, it's just that there are more people travelling and therefore more people would be doing it.”

None saw the need as having fallen, except in specific business areas:

” We pulled back in Europe and started focusing more at home and so it has decreased in sales. In purchasing it has increased because we are going to deal more and more with the Far East and although they do speak English, on the cultural side there is a need for learning.”

There is evidence that certain languages have changed in their relative importance, and some employers have a need for an increased number of languages:

“I mean we have some evergreen languages that you can probably imagine from watching the news. But there are others that change and obviously in the current climate as well post 9/11 almost any language could crop up... there is no sort of change in the roles that need the different languages, there are just more languages that are needed and a more real growing focus on the spoken language, on the vernacular language.”

“There has been a significant trend away from German, it used to be a very easy to find a German speaker, it’s dried up now and it is increasingly difficult and equally the market is now flooded with Spanish speakers which is not particularly useful. We do have an issue with Asia and we will be and are looking for more help on that side, so to people I’d say give us support in Chinese or Korean or whatever.”

“It would be an advantage certainly to be able to converse with our own employers in their own language. We have been bought by a Spanish company for example. So I see that as a trend that will continue as with a lot of infrastructure in the UK, it will be sold off to non UK operators.”

“Looking at our customer mix, it has German, French and then the oriental languages that come out quite strongly.”

In terms of the skills that employers are looking for, most tend to see spoken ability as more important than written ability, although there are exceptions:

“We are probably quite odd in terms of linguist employers in that we are particularly interested in the vernacular language, the spoken language. So we are almost interested in training people to understand how to speak badly. So from that point of view it is different but overwhelmingly the skills that we require are the passive skills here. “

“It depends upon the job role, but we would generally be looking for both speaking and writing skills.”

“It’s when they are staying over for a few days and they need to buy a cup of coffee or just understand the metro system or something, so it’s not written ability... so we do ask when we interview people; do they have this facility in foreign language? And is it just understanding? Is it written? Is it spoken? We go through those sort of things.”

5.2.4. Key factors driving the demand for language skills within business

A number of comments serve to illustrate the most widely held belief, that foreign language skills are needed for organisations to be able to get on in, and compete within, global markets:

“It is incorrect to say that you can excel at business just by assuming everyone speaks English. You are putting yourself actually at a competitive disadvantage because they can understand you better than you can understand them. It’s not a sensible place to sit. ”

“I think now that all sectors now work in a global economy, it’s a cliché but I think it’s true. It’s not only about the economic driver but also about the cultural driver.”

“Simply the globalization!”

“As a matter of principle anyone who wants to be effective in another country beyond a certain point, being able to communicate with people in that language in their own language is a significant differentiator.”

“It’s really about business development and growing the business as we move forward into other markets.”

“And for me at the end of the day it actually does come down to economics. If a company or an organization or a service industry can extend its sales, it will do so, in order to grow its profits. If the local market is saturated then they’d have to look at other markets and its going to be overseas and they would have to speak the language.”

“I think that yet again having the ability to deal with customers particularly in times of distress like a cancelled flight etc would be an advantage. In terms of business development, the airlines we are chasing tend to be now non UK based, having exhausted the pool of UK airlines that see Cardiff as a valid market and again I think sometimes that the ability to converse in their own language would be an advantage. And the other thing that has been a big influence particularly in Cardiff is the demands of sports tourism...it has developed particularly on the back of the Millennium Stadium which has an awful lot of international games played.”

For a minority, key factor driving the demand for foreign language is *“actually just being able to get on while you are over there”* while at the other end of the spectrum, a few organisations would be unable to operate without those skills:

“It is the core of our business, our whole proposition to our clients is...that we take an American client...we do Europe for them, so we talk to the French, we talk to the Germans, we talk to the Polish, we produce their literature, we do their PR and we just handle the whole thing and so it’s the core proposition of our company is the language skills.”

While language skills may not be crucial, the view that English is the only language needed in business was termed ‘old fashioned’, and certainly ‘having a go’ seems to aid good working relationships:

“You know make some effort! I mean particularly with the Japanese, we have got few Japanese speakers here and the Japanese seem to be both highly amused and also quite impressed that the English try to speak Japanese.”

A notion of ‘low expectations’ of UK foreign language skills was expressed by businesses. In some instances this has resulted in ‘brownie points’ being given to those who do speak a foreign language, and the ability to make a ‘huge impact’ in a business setting.

5.2.5. Areas of business that have seen changes in demand for language skills

Generally, it seems that the areas needing language skills are the ones that have needed them for several years, so there are not many different jobs requiring the skills, rather an increased need in the same roles:

“There is no change in the roles that need different languages, there are just more languages that are needed.”

“Very much the same as before.”

“I think that it’s the same... the only one example I can think of is that we have a lot of Spanish speaking cleaners, so when we employ a supervisor, we ensure that one of the skills that the supervisor has, is the ability to converse in Spanish.”

Technical roles are seen as an area in which the demand for language skills has fallen if anything, either because English is still often the language used, or because, as one company stated, their technical communication with foreign customers and suppliers is now being undertaken through the use of illustrations. Changes in the countries in the supply chain in manufacturing, with a shift often to the Far East, have increased demand for those languages:

“It’s a globalizing world isn’t it, it’s becoming impossible in a business like ours to not have a mind for it, everything from legislation coming out from Europe, sourcing out from different parts of the world...with growing globalization you are getting more and more specialization in different places, so you can’t source everything locally anymore now... for the moment English continues to be the business language, but Chinese mandarin will become quite strong or at least with people I talk to.”

One employer perceived an increase in demand in many roles:

“I think generally because of the internationalisation of air transport and the amount of travel coming from the accession countries, the need for language skills has increased across the whole set of jobs that we have here. I don’t think that anybody can be exempt, if you walk into a terminal with a badge on, if you work at the airport you may be the accounts clerk but you are still seen as an information point, that’s something that is becoming more prevalent.”

There appears to be evidence that some employers don’t necessarily see an increased demand in specific roles, but instead they are more aware of the need for foreign language skills:

“It’s more obvious in a commercial role than it was before, it’s clear now.”

“It hasn’t increased; it’s the realization that dawns on you that you’ve got to get on with it.”

5.2.6. Ease of filling positions requiring foreign language skills

Most of those interviewed indicated the difficulty in filling many positions needing foreign language skills. It is also apparent that many organisations have responded to this problem by recruiting native speakers in many cases:

“In fact this is a perennial problem and it’s partly due to the languages that we require, the rarity of them in the graduate market. We will be talking things like Chinese, even Arabic as well, Farsi and certainly African languages as well generally, the difficulty of finding anyone at the graduate level anyway is always a problem but also we have the extra layer in that, we have security considerations... It is a challenge and as I said, we have in the last 3 to 5 years been recruiting more native speakers but these are obviously people who are second or third generation British nationals.”

“Because we look to the international pool of people we can get people because what we tend to do is we are recruiting less Brits. I am talking about on the international commercial development stream we don’t get many Brits who come forward with the right skill set, language together with the other skills whereas the majority of western European or eastern Europeans and the Chinese for example would have a broader mix.”

“They are always difficult to fill... We just want to find good, bright and creative people who can write and speak a language and we are asking a lot, so it is always difficult to find those sorts of people.”

“Every one of them, there is a shortage of good language skills in Wales (and again we are talking every language there). Of course the crucial thing is that there is an awful lot of alternative employment out there which requires language skills, there is still a high manufacturing base in Wales and the inter-governmental services are absorbing an awful lot of skills. We are looking more for speaking skills but it’s equally true of writing.”

It seems that what is particularly difficult is being able to find people who have not just the language skills, but language skills in combination with other required skills and attributes:

“It’s very difficult finding somebody to employ in an industry that has language skills because in other words they can be your sales rep for Europe and need three languages for example, that’s very difficult to find because people might have three languages but they might not be able to be a sales rep for example. So anybody who speaks languages has to have other skills rather than just have language.”

“Recently, with our trainees we do struggle to find IT graduates with ‘A’ level French. I think because we are looking at a combination of technical skills and language. So you are kind of looking at two different kinds of competencies where people either tend to have a very technical mind rather than sort of linguistic abilities but not in that combination.”

By contrast, one employer felt that the situation has improved in recent years, and that it would now be easier to fill positions requiring language skills, largely because of the increasingly multilingual and multicultural nature of UK society:

“My perception would be that it probably has changed and my guess would be that it probably was at its trough 5-7 years ago, a reflection on the fact that British people are notoriously bad at thinking about learning languages. I think what has happened in the last 5 or 7 years is that there has clearly been a much greater influx of people from overseas coming to live and work and enjoy the UK and they have inherent language skills which as an employer is fantastic providing their English is at the level you need it to be.”

In terms of which languages cause most difficulty in finding the skills needed, the difficulty seems especially severe with rarer languages:

“Danish, and in the last couple of years, we have lost a Flemish tongue but again it just depends. Sometimes it has been difficult to get, we lost a Finnish speaker and as there are not many out there... it did take a few months but we got there...getting someone with a native tongue as well because we need both writing and speaking because there is a lot of communication done by emails and so the tongue is obviously important for the local dialect.”

“There are 90,000 Russian students in the UK studying degrees in English and we have got less than about 200 in China from the UK. So this is going to hit us hard in the next 5 years, we need to get our Mandarin skills up to date. Now Mandarin is becoming the most important language in the world after English and it will be in five years time definitely!”

5.2.7. Current skill gaps in relation to foreign language skills

There were widely polarised views as to whether there are any current skill gaps in language skills from:

“Everywhere! With Welsh we have not struggled in the last couple of years as the emphasis that the Welsh Assembly Government has put into Welsh in schools has borne some dividends on that. I’d like the same emphasis to go into modern foreign languages i.e. they become compulsory.”

“Loads of them, like every business, because we are a small company, we can’t employ people with every language skill that we need for the business. So what do you do about that? Well we use the English language or we employ agents to act for us in the country we’re trading in. Is that any specific job role for particular languages?”

To:

“No not as far as I’m aware, we just had an Italian speaking position up but it didn’t take long to fill.”

“No I think, I think actually what we have got at the moment meets our need but we have to see if as we move forward whether it’s as easy to recruit people who already have those languages I am not sure.”

However, the majority either specified specific skill gaps, or described areas of concern, expressing them in terms of skill or development needs:

“Asian languages, specifically Chinese.”

“I’d say the big skill gaps in terms of pushing further in the area of interpreting, is on the active side of things...because obviously so many linguists here have only needed passive skills for so long and we are coming up against a sort of period when the younger linguists are coming in and obviously wanting to speak the languages as well and there are more opportunities to do that now than there were before. So in terms of skill gaps its more development needs than skill gaps, I would say.”

“I wouldn’t say it is a skills gap, it might be a skills need but that’s not the same thing - a need is a development that would be of benefit to the company that we would support whereas a gap is obviously something which we are aware of which is not being addressed and certainly languages don’t come into that... I would probably say that French would be the one that most people would go for because we have head quarters there in Toulouse in the south of France.”

“In an ideal world we would be able to converse with the Chinese in their own language, I am one of those people who think that China is as much an opportunity as a threat therefore at some point we may start working with them on a supply basis but there is actually 400 million people with levels of disposable incomes comparable to ours who are worth selling to as well! So at some point it would help us to speak Chinese, unless we just go to sleep!”

5.2.8. Anticipatory changes in foreign language skill requirements

A wide range of employment projections are available on both a sectoral basis and an occupational basis within the UK and at a regional level.

These projections utilise historical trends based on sources such as the Annual Business Inquiry in relation to sectors and the Annual Population Survey in relation to occupations, together with wider information on factors expected to influence future trends in order to set out detailed quantitative projections.

Projections are typically developed in relation to expected net employment change or expansion demand, together with projections of numbers needed to replace those who leave their jobs because of retirement or other reasons (replacement demand). Combining these two sets of projections can then be used to estimate the overall net requirement for particular occupations or within sectors.

Although both occupational and sector based projections have the advantage of accurate historical data as a foundation, it is widely acknowledged that projecting these trends forward is particularly problematic and should only be used as a rough guide to what may happen in the future.

In the case of language and intercultural skills, the issues relating to future employment projections are, however, far more complicated.

Language and intercultural skills do not form a sector, but they are essential skills across all industrial or commercial activities, and add value to all sectors. This means that sector based employment projections cannot be developed for the language and intercultural skills using Annual Population Survey and other published secondary data sources.

Language and intercultural skills are also not associated with one specific occupational group, but form an important or an advantageous component of the overall skills make-up of a wide range of occupations. In this regard they are cross-sector skills and the Annual Population survey and other published survey data cannot be used to develop occupational projections for language and intercultural skills.

Because language and intercultural skills do not benefit from any detailed and consistent historical trend data, it is not possible to utilise conventional employment projections to project future patterns of employment change. It also makes use of scenario building techniques extremely problematic, which is the reason CILT have not undertaken such exercises.

The lack of such information means that what can be concluded in relation to future employment patterns therefore needs to remain highly speculative, as indicated by the qualitative responses from interviews with employers set out below.

The view that there would be little increase in the demand for foreign language skills was held by only a small number of employers:

“It’s possible... but no immediate requirement in the case of languages; I don’t see that changing.”

“I think that as (name of company) grows in the world it could do, but I mean we deal a lot with India and of course they are already... they have their own version of English...some people might start learning Urdu? I suppose that some might but that is not the same as a need. I really can’t see it changing that much because it’s going to be one or two people... So again it comes down to the language of the business predominantly being some sort of cross between American and English.”

One employer commented that although he was not expecting any changes in the short term, in the medium term he would expect the skills required to increase, and the languages needed would be determined mostly by where they decided to sell:

“It’s the age old ‘everybody speaks English’ so we get by when you are buying but when you are selling, you can insult the customer by not speaking the language, so it helps when you can speak the language of the customer.”

“If we decide as I was sort of toying with the other day to open up an outlet in Brazil , then we need people who can speak Portuguese but in that circumstance we probably would recruit somebody who’d worked in the locale, who spoke English and did the Portuguese bit for us. So we’d sort of buy the English skill rather than the Portuguese. So the skill (needed if a native Brazilian was employed) would be English because if you buy someone from the culture who speaks English, you get both the culture and the language in one body.”

This likely increase in using native speakers for language skills was echoed further:

“The only thing that I can foresee is there will be more and more of a need for active use of the language and further development of that and that’s something we can work on with more use of native speakers, that’s a trend now that we hope now will be on the up for us and also just generally developing our capability in terms of our re-training in other languages.”

The majority of employers do see language skill requirements both to increase and to change in terms of languages. The languages cited as becoming increasingly important tended to be repeated:

“What is true if you seeing in terms of upcoming languages Mandarin for non-Chinese speakers is clearly a very big area and anything that can happen from school level up to start to get Mandarin more and more on the radar would be critical and Spanish is the other one which we would like for international business it is a good banker in terms of being usable in multiple countries.”

“I mean we need to maintain our base but you know as business focuses more in the Far East and in India and Brazil possibly and Russia again... we haven’t had Russia covered, India has English obviously as business language, Brazil we have covered through Brazilian Portuguese but for us its Asia but as a growth of business and what they call, BRIC countries grows then we will have to reflect that.”

“I think it will become more important to the business. And one of the things that we are looking at is, strategically is how we differentiate ourselves from other airports... one of the things that we want to do is to provide a high level of customer service as most of the airports do and that will require I think some language skills in order to troubleshoot or even greet and to just provide a point of difference.”

One of the main points made was that it is not always possible to predict accurately how language skill requirements will change:

“Language skills are like any other requirement; you need them at a particular moment you need language skills depending on what you are doing.”

However not all of the employers interviewed are led by their business decisions to determine the level of language skills necessary amongst employees. One company has been led by some of its employees to increase language skills, with the

expectation that, as well as being good for its reputation, it will also be able to benefit from this change of culture if and when new language skills are required:

“We have just started out some French, German and Spanish groups which aren’t really key languages for the business but its not something that’s driven by the businesses, its driven by some of the individuals in the company, who just thought that it would be a good thing to do and so they got a social group for each language and so its not wholly dependant on the needs of the business... I actually think its beneficial to both because it’s the reputation of the business as well, allowing people to do that even if it is not instantly relevant to their jobs because it shows that the company is interested in somebody’s development generally... Then if an opportunity comes up for them to go to an overseas placement and they feel that ‘I have managed to improve my French and there is nothing to stop me from going to learn Gujarati or wherever it is’.”

5.2.9. Existence of formal language strategies within business

Indications are that the vast majority of employers do not have a formal language strategy for dealing with overseas customers or clients, although some realise that it may be beneficial to think about one:

“No, it is highly reactive. I think there has been a real seed change in the UK at the moment with this. We are suddenly realizing that we can’t carry on as we have.”

“It’s something that’s in development at the present time. We have had some changes, particularly with the ownership and then the MD leaving which tended to give way to things that we were moving towards but it’s something we intend to look at as part of the strategic refocus this year. Our new MD started a few weeks ago and as I said, his emphasis is that we will have a point of difference. My view on that is that the languages should be that.”

For others, a strategy is deemed unnecessary:

“I am not aware of one certainly, but again... you come back to the simple fact that in aerospace, commercial aerospace, commercial airlines, air traffic control, and all that sort of stuff... you are dealing with English speaking people.”

“As it is such a core part of our business, we don’t need a strategy for it.”

“We do not need that because we are put in a pool which says we can access that alongside other skills by and large.”

Others perceived how they currently dealt with overseas customers as forming a (maybe less formal) strategy:

“Just what I said about making sure that... the native tongue is able to talk to other countries in that region as well (so it’s always the right person always deals with that country’s customers) and they always have the backup there in small teams that deal with different countries. So there is a backup should that individual be off and I think that’s the key thing and I think the reason that has happened, as I said about the critical mass about resource coverage.”

“Not a formal one, well anybody who wants to trade with us has to be able to speak English... if a German wants to trade with a guy from Chile they have to speak in

English now...we are better off than most people because we have, what do you call it? Lingua franca!"

5.3. Current and future language training provision

5.3.1. Views on quality, availability, access and appropriateness of qualifications/ levels

Comments on current training provision were overwhelmingly positive, though perhaps surprisingly, while nearly all of the employers recognise the importance of language skills, many do not look to training as a means of satisfying these requirements.

One organisation typically takes on people who, say have a degree in French and German and it would be made clear to them that they are not interested in French and German, and instead they would be retrained in another (rarer) language of interest to them. Once the range of languages needed expanded considerably, the organisation could no longer cope with internal language training, so a contract was put out a couple of years ago to find external language training:

"So we have an external commercial provider who provides our language training and they are locally based for us and the contract, one of the stipulations of the contract is that all the trainers are not only qualified instructors in their language but are native speakers of their language as well and tried and tested and some of them were already on the books of the training provider others they bring in as and when we need them and they provide various courses, some of those will be retraining, ab initia retraining, others would be maintenance training or enhancement training but all provided by native speakers."

One large organisation uses no external provision at all because:

"We are big enough company and we have expensive training facilities... we can do that for ourselves, there are people here who are fluent in those languages with the possible exception of Japanese... I don't think we would need to go anywhere else for that."

The range of provision is appropriate to the company's needs and:

"Well the access is pretty good because it can be either desktop computer based or we do have an open learning centre which has a language facility attached to it and that's not language laboratory like we used to know years ago. People do it as individual study and then they have got access to these tutorials with the native speakers if you like which is what the language centre actually does."

Others are very pleased with the provision they have been able to access, specifically because of how appropriate to need it is:

"We are talking to them at the moment about language training for us and they can actually tailor to our business rather than go on a basic French course over the internet, you can actually go on a basic course in Czech which will talk about buildings and facilities management and the environment."

“The quality can vary hugely. I think there is a wide range of programmes available. I am very impressed with one provider, they are extremely professional, very able to move... they identified what my needs were and they were able to adapt to them during the intensive week, and that’s why they are first rate!”

“Yes, it does meet our current needs, apart from the Mandarin and that’s because we know our way around in getting it in the private sector basically.”

However, finding appropriate training when there are large numbers requiring that training and strict budgets, sometimes leads to compromises:

“It’s always a balancing act between sort of having something that’s cost effective to the business and having something that’s sort of flexible. The thing we find is that if you are going down a kind of academic route and qualification route then you can obtain funding for the training provision. But that takes you down a more sort of formal route in terms of study and so less tailored. If you go down to a more tailored, less intensive route then it is very costly and given that we have a hundred plus people on our program, it’s kind of that balancing act between improving skills rapidly and balancing the budget aspects”

Most training provision used is for top up, rather than ‘starting from scratch’:

“We have a range of providers that meet our requirements... Yes, our requirements are met because it comes back at the end of the day down to, with the exception of something like Mandarin where there is a general shortage, by and large what you look for is people who have a predetermined base and then you are topping up on top... There is something fundamentally wrong with the system. You should not be looking to employers to teach grown ups to become fluent in another language. That is saying that the education system hasn’t delivered the right product!”

“We have access to the right quality of external training. Now I was working in Mexico on a deal at one stage and I wanted to improve my Spanish and somebody came in and I was able to fairly easily find somebody who would come in and give me a designed amount of training to help me get the level I required.”

“Only occasionally (do we source training) when somebody comes to us and they have done French and Italian at uni but they have majored in French, they may go up to whatever the Italian is, usually in Manchester, somewhere to do a refresher or we may get someone in to do some refresher oral training to get their Italian back up to scratch... The range is fine but we wouldn’t try to teach anybody languages basically they would have it by the time they leave the university or if they haven’t... we can teach marketing say but we can’t teach languages, it’s too late!”

Reasons put forward for not accessing training provision relate not to negative aspects of current provision, but more often to do with priorities, a feeling of getting along without it, money or time constraints:

“We would look at training... but we haven’t got the time for it, to be honest with you because maybe we should do but we are busy and we don’t. We are covered by people enough; our business runs well with what we have got.”

“At the moment we haven’t only because as I said there has been little emphasis to commit what is essentially a lot of funds towards a company of this size, so that it would end up being bespoke at the present.”

“As I said it’s not top of our need tray, in an ideal world we would be able to speak in Chinese...in practice, we would probably, in the current climate we would recruit a Chinese national to work on our team and teach him English. In our business at the moment it’s not one of the core problem areas, it’s more an opportunity area but...it is not to say that it isn’t something we could switch our focus on, to be honest we’d just deal with it if it came up the priority list. Then I’d probably go and recruit someone who speaks the language rather than something else as to become proficient in a language takes a reasonable amount of time so... you can go and buy it rather than build it. If I found someone then and if I couldn’t afford it, then I would suggest it wasn’t a high enough priority.”

“It is pretty much down to individuals, we don’t really have a central area of the business that does it all on behalf of the company.”

The other reason is employing native speakers who don’t require foreign language training, although they may be provided with training in English if necessary:

“We don’t source it no, because we go for native so we don’t have the need for that although we do obviously encourage individual development and employee development and whether that’s a language capability or a degree in something not within the actual discipline of the person that we have employed, if we had not used all our training budget, then they could train.”

5.3.2. Aspects of current provision requiring improvement

A small number of employers felt that current training provision completely meets their needs:

“I would have to say we don’t have any burning desire or need to change how we approach these things and again as I said if people want to learn a language then it’s more likely that they will go out and source the provider themselves, a general college or that’s what we’re finding.”

“I suppose the glib answer to that is that it could always be improved but I am not aware anybody who is getting frustrated because they cannot have access to this training.”

One employer suggested different delivery methods which would improve his company’s current training provision:

“I think that it is twofold; one of which is workplace based training and computer based training, so people can continue in their own time. Both those I think would be better if they’d already been set up and we could benefit from economies of scale and carry forward from them.”

However, the importance of more training that can be tailored to the needs of organisations, and even specific job roles was emphasised by several. Suggestions included a move away from traditional qualifications, in favour of much more business orientated courses:

“I suppose if there was more flexibility in terms of qualifications and things that are available, perhaps that are very focused to the business language skills. I suppose as we go down the qualifications route because then we get funded through the college for going down the qualification route, sometimes obviously that means you

have got a syllabus that you have got to follow to the end to achieve your qualification. Whereas it's a balance between that sometimes and just needing the areas of a very specific business French that people may need to know. "

"It's the key thing really, if it's bespoke to the needs of our business."

"I think the quality of it is very good but I am not sure how relevant a lot of it is because for example one of my colleagues needed to go on a business German course and she went to the Goethe Institute and the quality of the training was very good but relevance, wasn't. I think there is a real need for bespoke language skill training."

"I think the key things we have already mentioned, it's the bespoke provision but its all very well buying a course off the shelf but you know the basic knowledge you'd want to use when you have gone on a holiday is so very different from the language you would need in a business environment. That's the key thing for us."

There is some evidence that some employers feel that more language skills need to be instilled, in different languages and at an earlier stage than work based training:

"The most fundamental thing is getting the school system better to deliver people who are more competent in the first place. That is the most fundamental thing and then, yes there is shortage of Mandarin at all levels and to the extent that its at all feasible to do business Mandarin at an elementary levels for people who predict that they are going to be working with China, that would definitely a helpful thing to be doing."

"In the UK we are still very old fashioned, we still teach French as a foreign language, that's not the right language by any means. The top European language is definitely Spanish... there is a new table for languages which says that English is the world's language for commerce, the need for learning languages then comes, Mandarin and Spanish and then Russian, so France is right down below, Portuguese would be more important than French... probably Urdu is more important now."

There were also comments made on the need for university language courses to better provide graduates with more experience that would enable them to start employment with a broader range of skills:

"I think you need to actually maintain the focus on actually understanding the culture. Again there was this debate here because of student loans and some universities are beginning to make the overseas year optional and we would view that negatively. Because we think that it's not just understanding the language, it's also understanding the people. So when we are talking about an investment in Spanish, we are looking for somebody who has been there and understands a bit how they think and what they look at and that's the main thing."

It is clear that some employers think that training provision can only be improved with support from the Government:

"We would prefer more sort of a long term commitment to improving people language skills and knowing that it would benefit them career-wise in the longer term."

"In the workplace I think there is the... little emphasis in putting support together from the Welsh Assembly Government in particular about languages. The Welsh Language Board has had a very good programme of trying to get workplace welsh

developed and with some training schemes and computer based learning. We haven't seen anything yet along those lines for modern foreign languages, I mean for small organizations such as ourselves it's quite an onerous task to try and put them together. So I think that's an area that can certainly be improved."

Another highlighted a 'lumpy' supply of training provision, meaning it is not an easy process to find appropriate provision:

"I could put the phone down now and with absolute confidence go home tonight and cook a meal, a Hungarian meal for 50 people, knowing nothing about Hungarian food whatsoever because I know with confidence that it would be quite easy to go out and get a Hungarian cookbook, within 30 minutes I could go and pick up all the ingredients... However if you asked me whether I could get some specific training, could I go home and work out even where I should be getting it, let alone delivering it to 50 people?...I don't know. So what I am saying in all that is that the supply chain in learning is faulty and difficult to buy from."

5.3.3. Preferred methods of delivery of provision

There were widely polarised views on preferred methods of language training provision. It seems that some employers need greater flexibility and have smaller budgets, maybe in companies in which language skills having lower priority, while others think that greater gains are made with more intensive methods, even including immersion:

"We prefer, we very much prefer sort of immersion techniques, or as close as you can get to immersion anyway without going to the country, so the teachers very early on start to use the language as the means of instruction in the class and so that's encouraged as quickly as its practical and the students are encouraged to use the language as well... they are intensive courses, and to give you a specific example our Farsi retraining course ab initia to degree level language is in 11 months, in fact it is full time training usually four days a week with one day for private study with all day in the class room - interesting experience!"

Another commented:

"I have tried everything and it is absolutely clear for me that what works best is personal attention, so one on one. I am a great believer in immersion! It is no doubt the most expensive way, but you get a bigger bang for your buck! I have a number of colleagues who do evening classes in languages and I don't notice a huge impact, not the step change that I would need."

Having had personal experience of learning Italian intensively over 10 weeks, the last three of which were spent in Italy with a tutor who spoke no English at all, another interviewee saw this as the best method:

"I don't think there is any other way, I personally couldn't have done it any other way, I am sure there are people who could learn a language over a longer period of time by going to night school or whatever. I had the incentive that when I got out there in January I had to speak the language because I was then working with 25 non English speakers."

It was also suggested that the method chosen reflects how quickly the employee is going to need the language skills, which is not always easy to predict by the company:

“We tend to look fairly far ahead put people on programs to progress their skills and then we may have sort of scenarios where somebody is going over to find for a period of two or three months on secondment and they sort of have a booster for their language skills in which case we put them some more intensive provision into place for them, also at the college.”

“We have four levels that are on site so people are at complete beginner level, people work at GCSE levels, people work at A levels. We do OCN level 1, 2 and 3 and then at level 4 CBLC exams but that funding has been withdrawn for level 4... So its portfolio work at level 1 to 3 and I think the examination is at level 4. We tend to do sort of odd top-ups for intensive things if people are going or working on a project and they need to go to France, they might need a bit of a brush-up on those skills. We would do perhaps 1 or 2 weeks period of half-day lessons.”

It was clear that a crucial factor in determining preferred delivery methods for many is the amount of time that has to be taken away from work. There was not one method that suited all employers, but all the majority seem to need flexibility around work hours:

“We prefer evening school or afternoon sort of thing, once a week sort of thing...they have to carry on doing the day job.”

“In the company’s time, some are groups, but some individual as it’s an entitlement of our policy and its one and a half hours per week. For everybody that’s on the programme, one and half hours tuition per week. We have college tutors who come on to the site here and who deliver either the group classes or to individuals one-to-one. It’s the time factor and again that they are our employees and are away from business for around an hour and a half. It tends to be sort of during normal working hours as opposed to lunch breaks but we also have people that on top of their classes choose to take extra tuition and that can be sort of done during lunch break.”

“It’s wider than work hours, its something like its up at 7 in the morning I think to 7 in the evening. That’s the centre itself but a lot of things can be plugged in directly through the desk top.”

There were mixed views on whether in-house methods or employees going to train off site are preferable. On the one hand, in-house delivery means less time from work is lost if it is fitted around the working day, whereas for others, it is easier to block periods of time away from work. The need for flexibility also means that some employers are in favour of computer based learning, as well as because this method is relatively inexpensive:

“We like private study at the open leaning centre, we do have links with the local university language centres and things like that but I think we don’t even use those now because the online programs just took over now... They just go in there for half an hour at lunch time, so you know its not necessarily formal courses but what we also use is native speakers, French and German and things like that who work here and we sort of do a lunch time tutorial with them and that sort of thing.”

Another employer sees the benefits of additional support on top of computer training provision:

“Well I think because people are so busy, I think anything that it is sort of computer based would be really good with some sort of tutorial obviously because its conversation and people need to practice. At the moment we send some people on intensive, send somebody away for a week and then expect them to be able to get on with it and I am not sure that is the best way, I think you need more of a modular approach. Intensive courses are relatively expensive as well, and if people don’t come back and immediately use that language, they lose it.”

Instead, an in-house tutor, available on an ongoing basis, someone who can perhaps do one to one with some ongoing support was suggested as the preferable method of delivery. This was thought to be able to prevent employees’ language skills from “going rusty”.

5.4. Investment in language skills

5.4.1. Importance of accreditation and qualifications

On the one hand, there are employers for whom accreditation of language training is not important at all:

“I have to say, I don’t think accreditation is important. I would tend to go by reputation and people’s experience who’ve been through the process.”

While for the majority, it can be important, often for funding reasons:

“Because of funding, we use college courses, and at a high level ‘you want that badge to go with it really.”

“Well obviously we would like to get a return on the investment and we would sponsor or pay for their examination fees, so there would be some things I guess that we would expect to see and want to see. I guess the answer is yes, we would look to see something because then if they wanted to go on the following year and continue or do something different, we would expect to be able to see how they got on with it last year.”

Accreditation is often seen as ensuring reliability in quality:

“It’s very important to us because we have to know that we can rely on it, for most of the languages, the rarer languages we rely on our external commercial partner that provides the training to confirm the accreditation and they have quite a rigorous recruitment and selection process for the trainers themselves, so we rely on them. That’s again part of our contract that we have with them, is that the trainers are accredited.”

“It’s assumed that it would be!”

“It helps particularly in terms of encouraging take ups because accreditation means that you have got a portable skill with the recognition can be taken elsewhere and from our point of view it would be important.”

There are also those who think that while it is not so important for employers, employees prefer accredited courses that lead to qualifications:

“The individuals might I mean but not the company.”

“Currently it’s not vital for us but I think as we move forward the people who are doing the training, they will be asking for some accreditation. Because we are finding that even with some of the basic German, French, Spanish...people are saying, well will I get anything at the end of it? I think it would be employee driven, I think the organization is happy as long as somebody has the competence for it.”

Qualifications are generally not seen as important as reaching an acceptable standard that can be put usefully into practice. As two employers commented:

“I don’t think they (qualifications) are that helpful at telling you how good somebody is at a language in terms of being able to function in it, because they don’t usually have a business element in them.”

“It is not important to us per se that people get a qualification for language, its important that we are satisfied that the delivering meets the requirements of our particular individual. Specifically the provider who we would go to, provides us with a track record... but we would not be using it as part of a point gathering exercise to be seen to be done x,y,z amount of training over a period.”

Similarly, another said that they did not look at the qualification, but wanted to see:

“Its practical use...qualifications mean nothing unless... we would say the same thing for MBA, an MBA is an indicator but actually what we are interested in is what somebody has done on the job.”

5.4.2. Expenditure on foreign language related employee training

Around half of the employers were unable to say with confidence how much they spend on language related training, though most seemed to feel that they didn’t need to spend more than they already do:

“I couldn’t tell you again, I am afraid off the top of my head, the training is by no means cheap, so it’s a fairly large amount that couldn’t tell you of the top off my head. It certainly is (adequate), it’s been running for two years now, the contract and it has already turned out people who are certainly ready for the job.”

“I suspect it is in the whole training budget most of which of course is spent for technical stuff, I would expect it to be staying in the single percentage figure. Do I see that as adequate? Well only from the point of view that we seem to get everything we need and I mean it’s more down to individuals to learn, rather than as a business imperative for them”

“I don’t know the amount but I believe when we identify a need we can find the route to address that need.”

“Not a lot, and that’s adequate.”

“These computer based programmes cost us money and the facilities, to set up cost us a lot of money and you are talking about serious amounts of money each year which goes to the hiring of the programmes from the providers. So we do spend money but I mean we probably spend a fraction of the money on language training than we do on developing our engineers.”

For one employer who is looking to begin sourcing language training provision, the cost of this provision was something that he could not predict:

“At the moment we haven’t even got up to the point where we understand how we are going to roll it out, let us say it needs something for this year. I think for the first time we’ve pretty much got an appreciation of where foreign languages may fit in, in with the company’s strategy and structure and I think that will be a big change.”

The employers who quoted expenditure were certain that the amount covered their training needs:

“Not a lot to be honest because as I said they are sort of trained already. A thousand pounds a year and that’s adequate.”

“Around 70 or 80 thousand pounds, it’s adequate for what we need.”

Only one employer commented that the way in which language training is budgeted for needs to be improved:

“Its local budget driven so again I won’t be able to put a figure on how much they spend. If a functional head or a director has a need for something, he would just source that... I think it’s an appalling way to do it but... I think we should have... I think this thing should be centrally driven, there should be a budget for it and there should be some sort of evaluation. Because at the moment we are really not evaluating the business benefit of it, of sending people on intensive programmes.”

5.4.3. The business case for investing in foreign language skills

For a relatively small number of employers, it is apparent that the business case is central to their existence:

“I don’t know whether it stands to reason but in terms of what we provide... we could be called on to provide material for any foreign language translated from any foreign language, so it’s absolutely vital to the business.”

One employer could not see a strong business case for investing in language skills:

“I don’t think it’s up there right now because as I said English is the key language and we certainly get by with that, it doesn’t stop or deter or influence how we do business, we have the resource you know within the customer care centre and we reach out to all of the countries that we need to do with the capability and if that changed then obviously we would address that with a new resource.”

Some emphasised the fact that it is difficult to quantify the benefits:

“That’s really hard because the sort of measurement that we have been looking at is the business reputation of the brand and it’s not just about somebody who can converse, its about the impression that gives to potential clients and that’s a really hard thing to measure. We could say we would win more business if people can converse in Hungarian but it’s really difficult to pick that out.”

“If there was more research that could say, if an organisation invests in this here are some typical bottom line results and then that would help. But then it’s like everything we are always looking for the data aren’t we?”

A number of comments serve to illustrate views from several employers, that investing in language skills can make significant differences in the profitability of their companies and other tangible benefits:

“All the time it makes a difference! If you can negotiate and work through a business deal in their language, they usually speak English after a deal, but if you speak their language, they really, really appreciate it and you get a lot of goodwill out of that.”

“English on its own is not enough, we do need to try and speak foreign languages to for example, if an English guy is going to sell a cup to a guy in Madrid, and so is a Polish guy selling the same cup for the same price and if the English guy didn't speak Spanish and the Polish guy does, then the Polish guy will get the business. And that's a good example of where language is important... I am one of the people that realises that British business can do better if we had more people speaking foreign languages.”

“Certainly for us, for quite a number of roles, it's an essential requirement because there may be very frequently having video conferences with France sort of certainly with the IT and Finance division. A lot of the technical information that comes through will be in French, it needs to be translated and then applied in the UK. So there is that need there...and if my language skills were better than they are then it could mean I could communicate more frequently with my colleagues in France whereas I tend to get by on sort of pigeon email in French but there would be more options for me to be able to discuss group policies”

“As a point of difference, it will improve skill base, for employees its about self esteem as well, I think you know, achieving a language is a very strong way of developing a level of self esteem and the ability to get back into learning which will have a tangible benefit for them and the business.”

“For me at the end of the day it actually does come down to economics. If a company or an organisation or a service industry can extend its sales, it will do so, in order to grow its profits. If the local market is saturated then they'd have to look at other markets and its going to be overseas and they would have to speak the language.”

“I think for us the important thing is that English maybe the language of business but business needs languages because when you sell to the consumer or the small trader they speak and are more influenced by material and argument in their own language and so we shouldn't get suckered into thinking that just because all the big businesses talk in English, Dutch is no longer relevant or Spanish or Italian or Polish.”

5.5. Intercultural skills

5.5.1. The need for intercultural skills within organisations

Without exception, all of the employers recognised the need within their organisations for the skills to work effectively with people from other countries or cultures:

“We certainly do see that need and it is also enshrined in the civil service code and it's also in our internal value as well as an organisation, so it's certainly something that is addressed from the highest levels of the organisation.”

“We have a need, of course to work with colleagues from other countries and cultures as we have got people here who have come here from abroad especially to work with us. We need to manage a team of people from different countries or cultures and we deliver products to people from other countries and cultures.”

Some employers went as far as to say that the need for intercultural skills is greater than the need for foreign language skills:

“I think cultural awareness when dealing with, particularly suppliers in other parts of the world, is more important to us than being able to speak the language because they can speak to us in the way that we understand but we don’t understand immediately without thinking about it whether we are insulting them or whether when they say yes they mean no and things like that. Cultural awareness...an understanding of...a contract in China is just a beginning of a discussion and not an end of a relationship... Yea...there is a lot of cultural awareness needs”

“That’s if anything more important than language... in our particular world people interact all the time with people from different nationalities therefore to be able to have some insight, some basic behaviour to enable you, to be open and to learn from other people and to behave with other people is critical.”

A few commented on the fact that intercultural skills are skills which are not specifically thought about, but arise from daily working life:

“Working here is a cultural awareness! I’d say it’s addressed every day, it’s not the big stuff that trips you up, it’s all the little things... You know they are all easily got around usually. I don’t think we need to do an Archbishop of Canterbury act but incorporate it in... a lot of our stuff is driven by Health and Safety and the Factory Act and things like that.”

“I think it’s not such a big deal. But you know generally people have been working with their counterparts in France for long enough that we can now understand how each other works and so I suppose it’s an acceptance that French culture is very sort of get-things-done and pass –them-on, quick-turnaround which becomes part of our company’s culture as well, as part of sort of the language”

Comments from a number of interviewees demonstrate the variety of situations in which they recognise the need for these skills:

“It’s understanding the culture; let’s say our people go to a country on an average 3 or 4 times a year to trade shows or something whether it’s Germany or Paris or Chicago or whatever and that helps to keep people in touch and we encourage travel and everything else and so that’s something we encourage and it happens as part of the job.”

“One thing that has been of interest to us is in the difference between the UK and Spanish in terms of management styles and ownership cultures and I think that came as a big surprise to us. We had a view that there was a sort of European standard which we found out it isn’t the case and I think that sort of challenge has happened to a lot of companies.”

“I think it is important, language is more than... being able to work beside other nationalities is more than just language. Understanding their cultural attitudes, Japanese is a great example of that in terms of the levels of deference etc that’s required and all those sort of things I think need to be taught alongside language if we want to have a real progress on this.”

“Absolutely we need those skills and not just in terms of working internationally but also in terms of our workforce here as well, managing teams of different religions, different cultures you know why people need to have certain time off, why people are fasting on a certain day...all those sort of things that we try and understand but we don’t really understand.”

5.5.2. Extent of use of training in intercultural skills

Despite the recognition of the importance of intercultural skills, very few companies have sourced any specific training in this area:

“Only in terms of the linguists do we give specific cultural training but that’s in terms of making easier to do their job, in terms that would be cultural training specific to their language, recognizing certain things... for example if they are training in Arabic, they would have cultural training in Islamic practices that kind of thing, make them aware of the cultural differences.”

“We do intercultural training formally there in Toulouse, that tends to be intercultural in between the main partners in the business you know because you will be going to work in Germany, Spain and France and you would be staying there for a period of time perhaps.”

Many seem to deal with intercultural awareness in less formal ways:

“I don’t think there is any formal training. I think certainly awareness is made but it’s all done in a very low key sort of way because that works, doesn’t it whereas getting all officious about it isn’t helpful usually.”

“Well you know often we get from our own employees. In fact some years ago I had a delegation here of about 9 high level Chinese professors from the Beijing institute. If I go to our local university or something like that then ok yea they’d be able to help but the best help was my Chinese friend who is in procurement... at the same time he tells us how to behave, what’s acceptable and what’s not... We learn a lot from our own people.

“No we have done some sort of very basic diversity skills training, sort of a half day really, an awareness rather than anything more in-depth, general rather than one particular culture. We are a multicultural society now and we need to be aware of it and I think we need to do more and I think everybody would benefit.”

Others feel that training is simply not needed:

“No, we don’t need to, the thing is when people get here because they have done a year out during their university degree, interculturalism is a natural part of who we are and what we are. It’s not like we are a manufacturing company and we are having to teach people how to deal with the French or whatever. It’s so much a part of what we are.”

“Oh no we don’t, we do have a code of conduct and awareness of different cultures as such but not in any great detail, I think because we’re so used to it, there’s no need for any courses.”

There is some cultural awareness of specific countries, though again this seems to be usually carried out informally or as part of some other training:

“We do a lot of teamwork training which typically involves people from all different nationality. We don’t necessarily go into detailed cultural training although we have done some specifics around China for people who are starting to work with China.”

“Not specifically, though we went to a Chinese thing the other day which partly covers that, it was actually UKTI event. It covered a number of different activities and one of them was cultural awareness as far as Chinese was concerned which was really quite an eye-opener so we sort of...it wasn’t a formal training session but actually and practically we were learning things.”

When asked if it had prompted him to think that it would be worth investing in some intercultural training or not, he replied:

“The short answer is no...because it’s not a big problem, it’s like a lot of things...there are some things that are a good idea when you manage to get around to it and other things are essential and you are going to go bust and it’s not essential this week, it might be next week.”

A number of employers who haven’t yet used training provision in intercultural training, do think that they might in the future:

“We would hope to, there seems to be no point in doing half the job, with just a language.”

“I think the decision to invest in intercultural training would be very much about who is part of our workforce at the moment, whereas when we are dealing with customers abroad, the language is more important.”

“We haven’t really had the need to access any specific training on intercultural working skills or cultural awareness or anything like that. It may be the case in the future but I don’t know about it.”

In terms of which cultures in which training were thought to bring benefits, several were mentioned including Far East Asian cultures, but also countries whose main language is English:

“I think we would have a look at some of the European bases as well because there are very strong subtleties even with the EU beyond that I think the oriental skills are...a culture I would say where we would have the most interest.”

“At the moment I would say some of the African countries and some of the eastern European countries, I am talking about places like Albania, Macedonia, Poland and we have such a varied workforce now...it would really be to cover everybody who works for us.”

“I mean even when dealing with people who can speak the language, America for instance, there are strong cultural differences in different parts in terms of... our sort of forward growth plans in export market are at the moment tend to focus around...are focusing around America and Australia”

One employer commented on the fact that it may be more difficult to make a case for using part of the training budget in this area:

“Unlike languages, cultural things are a bit softer than that and so they are a more difficult sell than doing the basic languages.”

5.5.3. Views on quality, access and value for money of training provision

As less than half of the employers interviewed had any experience of accessing training in intercultural issues, comments about the quality were limited:

“We haven’t accessed any training in that area as we’re a small business and we just don’t have the people to take on those skills at the moment. It’s not the money, it’s the time...people don’t want to go to night school... cultural understanding is important but for small businesses you don’t find it, to be honest with you.”

“I don’t know...I haven’t really looked into that.”

Comments that were made were positive:

“It’s probably difficult to say at the moment but certainly from the example on Islam familiarization, that has been very, very useful, it has been an eye-opener to the people who have been on those courses.”

“At the time when (our two companies) merged, we had a specific focus on Anglo-Swedish because that was very obvious... a lot of people were colliding from different cultures and there were things emerging there that suggested it would be helpful to do some basic training.”

“Yes, we are able to access what we require.”

“Just two miles away, is a provider that would put on intercultural as well as language training I think they are available pretty well all the time, it’s just when you get sufficient numbers. There’s not a need of one particular culture or country especially, the formal courses we tend to do are for our European partner companies. I mean for instance we put our graduates through it for a 3 day awareness course when they join the company and that’s all about you know the partners we have, the customers, all that sort of thing. Others can go on if they can get approval of their management, the budget’s there and the travel budget’s there then others can do it.”

“It is in fact provided by the same commercial provider... (as language training) something that we hadn’t done initially because we focused the contract entirely on the language side but it since became obvious that there are too many languages we are covering now in which a very western looking mindset just doesn’t work, so we needed to add on the cultural side of things. There are certain things, you could be perfect at the language and just not understand the cultural references. That’s relatively recent I mean in terms of the formal training, in that, provided by the external provider that’s only in the past year.”

Considering any improvements that could be made to intercultural skills provision, there were a range of different ideas:

“I think for most employers the issue on both language and cultural skills training is getting that first start, that first step and without some obvious framework and template in place so that they can buy into and take away that fear factor almost, that they got to do something from scratch. I think it is always very difficult for organisations such as ourselves here, with 100 employees directly employed and then a lot of employed under a web of contract, to actually make that first step forward. So I think that’s where the assistance should really happen.”

“It’s a difficult question, probably if you asked most of linguist contingent what kind of training they prefer, it would be in-country immersion which is possible in some cases but for obvious reasons in others it just isn’t feasible. So this is one of the reasons why we insisted on native speakers providing the training because there is some sort of simulated element there of immersion but that will be the only real practical gap.”

Many employers were not aware of anything that they needed, but could not source,

“I am not familiar enough with the current portfolio to be able to tell you that.”

“There is not really as we are pretty used to dealing with all these countries now I mean in the last 35 years we have put into service 5,200 aircrafts in pretty well every nation and every culture in the world. We do have experience of dealing with these people.”

5.5.4. Accreditation of intercultural skills training

Employers who are in favour of accreditation of language training tend to be also aware of the benefits of accreditation of intercultural skills training and to want to move towards accreditation even if it is not the case at present:

“Yes again like any other training, if you have accreditation then you’ve got something you can take with you and it’s good for self esteem.”

“They are not formally but we ask for the trainers to be accredited in their languages. I think that it should be, I think it’s important and that will probably be the way we’ll go.”

Likewise, other employers are more concerned with the level of competence achieved:

“It is the same issue really as the languages. That is less important than knowing from experience that a particular provider helped a team to move forward and work more effectively.”

“I am not sure that’s important no, I think it’s more about giving people the knowledge.”

“We have got various sort of levels of certificates that we give them from the open learning centre, you complete the programme, one of these computer based programs or you know even if its offsite by local universities and colleges then certificates... certificates of achievements are given and they would be recorded formally on our computer system. In our business... we each have to keep a record of training and development proficiency/competence.”

5.6. Conclusions

5.6.1. Current and future language skill needs

Foreign language ability is valued by many employers, even where it is not essential to the job:

“I mean we are looking for I suppose the order is engineering capability, the right behavioural structure and then sort of additional extras, you know capability in a

foreign language which will show a flexibility of mind and a potential capability that we could use in the future and its just other plus points towards employment.”

The preference in general, is for evidence of the ability to use a language (and even better, have experience of living within the culture) rather than simply a qualification in a language:

“We recruit across all universities really... We don’t look to recruit language graduates specifically but we would target courses that combine language, so for example if we were looking for a finance trainee we can search on degrees that do business with language. If they’ve spent time abroad, I mean it helps, it does improve the level of fluency in terms of their language skills but we would not look for that, it would be a bonus.”

While skills gaps are not necessarily perceived, many employers have difficulty in filling positions requiring language skills:

“Wales has a very low rate of people coming out of school with any language qualification at all. So it’s a big problem for us.”

“We are asking for at least a B grade at ‘A’ level in one language. Ideally more than one but we found from doing our own market research that we would be shooting ourselves in the foot if we insisted on anything more than that, disappointing yeah...but in terms of reality”

The majority of employers see an increasing need for language skills, due to globalisation, business development and the need to be able to compete effectively:

“We are an increasingly global world. The ability to compete for global type jobs and in fact even as adding more countries, increasingly foreign companies set up in Britain. If you want to do well in the foreign company that is based in Britain if you are able to develop that language skill then you are going to be better positioned than somebody who doesn’t have it. Speaking will always be the most important as it’s the practical use. It’s the ability to communicate in other languages which is the predominant thing.”

“We need to be aware that these foreign language skills are more important to us than we are aware of today. The government needs to restore the teaching of foreign languages after 14 and we need to raise the profile of languages as a tool for business. If you are not aware of the need for it, then you are not going to do it.”

5.6.2. Current and future language training provision

Many employers seem to be reactive in accessing provision, it doesn’t seem to be planned and not many employers have a formal language strategy:

“I think that’s understandable, on the basis that... at the end of the day any company exists to make money, you can’t get away from that and therefore its expenditure is going to be driven around by how much they are going to get the return for it. So therefore it would have been wholly inappropriate for my company to send me on a 7 week Italian intensive course 3 or 4 years earlier if there was no intention of ever sending me to Italy.”

“Well it’s a core element of the business and our whole proposition is one office, one world. So you can talk to us and we will talk to everybody for you and by that it means that we talk to an editor, a German editor in German and then it’s more likely

that your story will be published than if we ring him up in English. And so it's actually core to our whole business."

Comments about the quality of training provision were positive, with many stressing the need for flexibility and tailored or bespoke training:

"I think it's the flexibility, qualifications of course and certainly at the higher end above 'A' level. Sort of very business focused but also looking to get people up to that fluency level. It should be recognized by people when they are at that level, you want that badge to go with it really. Certainly by that stage they have potentially been studying for a number of years to improve their language skills so I think that it's quite understandable that they kind of want their badge to go with it."

The most common form of language provision is for 'topping up'; unless more expensive intensive or immersion training can be used, many see that if language skills have not been developed earlier, work place language training is too late:

"Employers can put the icing on the cake and we can talk about you know how generically people with languages are more useful to us than people without languages. But fundamentally, just like we shouldn't be teaching them A level chemistry at work, they should come out with a chemistry competence if they are going to be a scientist, they should come out with part of a skill set of at least a basic grounding in a foreign language and the cultural awareness."

5.6.3. Investment in language skills

Nearly all of those interviewed expressed the view that they spent an appropriate amount on language skills training, though there was divergence as to the value of accreditation and qualifications.

There is some evidence of employers employing more informal methods of improving language skills, following a demand from employees:

"We are in the early stage of two to three meetings for each group; we are putting on films and that sort of thing. It's employee driven and supported by the company, the company aren't paying for it or anything like that. It's really been just the employees so far although we did have Jane Collis come to us initially and talk to us about the need for languages in business and I think when people came out of that, we just decided that rather than waiting for something formal, not everybody wants to learn Hungarian or Czech, people are very interested in French, German and Spanish because of holidays and things like that and it's a start. It may lead on to other languages, and yeah, people are very excited about it."

It can be difficult to quantify the benefits of investing in language skills, but the majority feel that it makes a positive difference to their organisation, whether they have use of those skills in the immediate future or not:

"I mean I have not done research specifically but my gut feel would be that if you have two identical candidates and one speaks a language, the person with the language would get the job. I think also people understand that somebody having a language puts them at an advantage if they want to go and do business with those countries and therefore they might be prepared to pay more to recruit that individual."

"The strongest message from me is that language is, in my experience both personally and wider, the skill of an individual to both learn a language and to be able

to then speak a language, to communicate in that language absolutely adds to employability. There must be some figures somewhere that suggests how it adds to salary...but I think in a broader sense it adds to a good many things like values and ethics and morals and just broad understanding in terms of who you are dealing with, how you are dealing with them, cultural issues and just makes it and just makes those relationships broader, deeper and much more enjoyable.”

“I think that our efforts towards languages, our commitment to them actually as a nation, is woeful!... when I was talking to small businesses here, small businesses that do business overseas tend to be more productive than businesses that don't, and businesses that have somebody who can speak the language of where they are working overseas tend to be more successful in getting overseas business. So you need to persuade people to get that commitment!”

The high cost of investing in these skills for one organisation in which language skills are crucial has led them to reconsider how to retain those skills:

“There was a real realization that these people are employed essentially for what is a rare skill, a rare language and that we should be nurturing that. So we have actually internally developed now a language strategy which includes a career path for linguists intentionally to keep them in language and to reward them for language capabilities primarily other things as well but language ability primarily. This strategy is fairly new, it's fairly recent but... in terms of seeing any benefit, we certainly are...in terms of the attrition rate, it has certainly dropped considerably... There is certainly an increase in enthusiasm amongst the linguist workforce and a feeling now that language really is the key skill that's valued.”

5.6.4. Intercultural skills

These skills are considered important by all employers, as even in the rarer cases in which an organisation's workforce is not particularly diverse, there is always a need to work effectively with clients, customers and/or suppliers in different countries:

“I think there is a need; there is also an interest in and possibly a desire to understand other cultures and to do that you need to understand the languages.”

The realisation of the importance of intercultural skills has not, in many cases, yet been translated into utilising training provision:

“I think it depends on what your requirements are of the individual and the role and also the environment in which you are asking them to live and to work in. I mean clearly there are some environments and countries in the world where the day one cultural understanding is as important as being able to say, please and thank you and where is the restaurant in their language, specifically areas around Middle East and areas in the Far East and in terms of you know, do you or do you not shake hands, how do you hand over a business card, how do you say hello, the formalities of business meetings. And you can really offend somebody if you go wrong unknowingly and unwittingly you then completely compromise the whole sort of reason for making the trip and getting involved in meeting and having spent the cost and the time presumably getting to that meeting seems a bit daft if you don't then understand the basics of how you communicate.”

It is more often preferred that employees will already be able to demonstrate evidence of having acquired these skills previously, such as through having spent time living abroad as part of a university degree:

“It would show that they have at least the basics of that understanding especially if that then meant that because of their course they would also have an exchange with a university and another country. That would make them, ooh yeah that’s something value added. That tells me I can move that person around more easily. That tells me that, that person is more likely to be able to integrate in a multicultural team”

“I am not afraid to say that looking at middle and senior leadership we will typically be looking for evidence that people have already operated in a multicultural environment and are able to say yes, I have travelled a lot, I have worked in a different country, I have done something in my university related to other nationalities and so forth.”

6. Case studies

6.1. Introduction

The purpose of this chapter is to set out a range of employer case studies that demonstrate good practice in relation to the development and use of language and intercultural skills in a business environment. The case studies, which have been developed by CILT through the Regional Language Networks involve a very broad range of industrial sectors and cover each nation and region of the UK⁷⁵ as follows:

- Scotland
- Wales
- East Midlands
- East of England
- London
- North East
- North West
- South East
- South West
- West Midlands
- Yorkshire and the Humber

Conclusions at the end of the chapter seek to draw out the lessons for all businesses that seek to trade in non English speaking countries. Given that language and intercultural skills are a cross sector activity it was felt to be particularly important to demonstrate that the issues facing businesses cut across all sectors of activity and all regions and nations of the UK.

6.2. Scotland

6.2.1. Shell Shared Service Centre

Shell set up their multilingual shared service centre in the very heart of Glasgow opposite Central Station in 1998 and have rapidly recognised the benefit that it brings to their operations. So much so that they are now set to grow their staffing from a current 440 to around 550. The core of the Centre's activity is processing high volume financial transactions, accounts payable and receivable from all over Europe in a wide range of languages.

Following a search of UK locations which could offer what they needed, in particular staff who had the necessary blend of accounting and financial skills as well as foreign languages skills, Glasgow proved the most attractive location beating off strong competition from other potential rivals such as Manchester.

25% of the staff are employed specifically because of their accounting and language skills and collectively they cover 34 languages, mostly European ones – the Nordic and Mediterranean countries, though the centre is a global player and this is reflected in its array of languages.

⁷⁵ No case studies currently exist in respect of Northern Ireland

Glasgow was the first in a global network of 5 such centres, along with Kuala Lumpur, the Philippines, Krakow and Guatemala and as such is leading the way in the development of such centres. For this is not a call centre, where staff usually speak to customers, here the financial transactions which are dealt with tend to be done so by email and hence skills in reading, writing and data processing in foreign languages are more crucial. However, this does not preclude staff from using their spoken languages when necessary and native speaker fluency is necessary to maintain professional standards.

In an age when “texting” has become prevalent, customer service training here ensures that the literacy levels in foreign languages meet quality assurance targets. Of their foreign language speaking staff, approximately 40% are from the UK, with many of the other nationals having UK partners, something that tends to assist longer-term staff retention.

Recruitment for foreign language staff is managed through 3 preferred supplier employment agencies and while they manage to fill vacancies, speakers of some of the Nordic languages are more difficult to recruit than others.

Setting up and running a multilingual shared service centre was no easy task and Alistair MacWilliam, Centre Manager and Pauline Isherwood, their Learning and Development Manager, recognised early on that there was a steep learning curve in starting from scratch. In recruitment, they recognised the importance of very careful assessment of the job specific and customer related language abilities of their foreign languages speakers and that limited conversational ability is not sufficient.

Equally, they recognised that retention of highly mobile foreign language speaking staff is crucial and introduced a language premium, however, only 50% of this is paid up front with the balance being paid after 15 months to ensure staff turnover is managed. Early after set up, it was considered that retention for many of the foreign language speaking staff for 2 years was realistic, though as the centre developed retention has become less of an issue. Those who settle and have families tend to be interested in longer-term work commitments.

In the early days of the centre, it was necessary to ensure that the non-UK staff were integrated into the community, and they offered English language classes to boost their confidence. All new staff go through an induction programme, and overseas recruited staff will get support in hotel accommodation until they can make suitable living arrangements – additionally they can access relocation costs to ship household goods.

For the UK staff who have foreign language skills, they support them in developing their language skills after work and will pay fees if it is to develop language skills for a country they are working with.

With new issues in corporate financial governance – Sarbanes Oxley (SOX), and the expansion of the Shell Global Corporate Card, the Shared Service Centre is set to grow its staff from 440 to 550 and a proportion of these new jobs will also require foreign language skills as well as accounting and computing skills and the future for such multilingual specialists looks very bright in Glasgow.

6.2.2. Sykes Multilingual Call Centres

Sykes Group has a Northern Europe HQ and call centre in Edinburgh, with a back-up centre in Galashiels.

Edinburgh was chosen because of the supply of language skills available. The majority of foreign language staff are not native English speakers, but who had come to the university.

The call centre industry in Scotland has been dealt a series of blows by India's success as an off-shore call-centre location. Cheap labour and a well-educated English-speaking workforce tempted many companies into outsourcing work there, but Edinburgh-based Sykes Enterprises has built on its strengths with a multilingual workforce and by adding value through in-house fulfilment. Sykes Enterprises is a major global organisation with headquarters in Florida, but its northern European operations are run from Edinburgh. The group has an HQ with 150 staff, and a call centre with about 500 employees, supported from Galashiels where 140 people are based. It chose Edinburgh despite its higher costs because of the advantages offered by its supply of language skills.

Sykes' call-centre operatives speak sixteen languages between them in the northern European region alone, including Russian and Turkish. The majority are foreign, rather than English speakers with second languages and generally, they have come to Edinburgh to go to university. About 65 per cent of Sykes' business at its call centres in Edinburgh is in a language other than English, although that can shift ten or 15 per cent in a given year. And its multilingual workforce helps it to bid for major European contracts.

Sykes' business is to provide life-cycle support for products such as mobile phones and digital cameras. If you live in Madrid and your phone battery stops working you might well call the manufacturer's helpline to find out what to do - and end up speaking to one of Sykes' Spanish agents in Edinburgh. Sykes' major advantage is that it can offer the same phone manufacturer the same service for most of its customers across Europe (and often globally). After a Sykes employee has spoken with a customer, the Galashiels fulfilment centre often comes into play. On the call-centre side, they can take an order for a camera or a mobile phone, or an accessory such as a cable or memory card and then fulfil that from Galashiels. Their fulfilment facility is one that most other call centres lack and which enables Sykes to offer something extra to potential clients and this is essential, as competition is fierce.

Sykes are in competition with other multilingual call centres for language skills, but Sykes tends to not have too much of a problem attracting staff. Employees can expect to earn slightly more than they could do on a single language facility. Sykes also markets for staff across Europe to come to Edinburgh.

The challenges for the company lie in trying to maintain stability when much of the business is built on the rapidly changing consumer technology sector. Products such as cameras, phones, laptops and PCs, which Sykes traditionally supports, are becoming almost disposable. Sykes' strategy is to manoeuvre gradually into low-tech consumer products such as washing and hygiene products, where the market is more steady. They envisage some expansion of the company in Edinburgh, but don't think it likely that staff numbers will rise over about 800 from the current 650.

6.3. Wales

6.3.1. SRK Consulting (UK) Ltd

SRK Consulting (UK) Ltd is an independent firm of consulting engineers and scientists, established in Cardiff in 1988 to provide consulting services to the mining and other natural resource industries, as well as in environmental and civil engineering.

The company is a truly worldwide organisation, having worked in Spain, Russia, Sweden, Armenia, Bulgaria, South Africa, Namibia, Ghana, Tanzania, Mali, Guinea, Burkina Faso, Turkey, India, Saudi Arabia, Iran, Yemen, Uzbekistan, Chile, Peru, Colombia, Cuba, Surinam, Indonesia and Thailand, as well as recently establishing offices in China and Russia. In order for SRK to operate efficiently and compete successfully in this global market, it has recognised the key value of languages capability. The company actively encourages its employees to acquire the appropriate language skills by funding Training and Development. SRK has set up a website with links to multilingual guides for non-English speaking clients and produces marketing literature in a number of languages.

SRK acknowledges that although conversational language skills are inherently useful, technical language capabilities are almost indispensable. Therefore, the company has begun actively recruiting staff with specific language skills, which can mean recruiting people who have English as a second language. This directly benefits the company as it encourages a wider understanding of cultural and ethnic diversity, as well as providing the opportunity for other staff to learn further foreign languages through contact with their colleagues.

6.3.2. Thomson Financial

Thomson Financial in Cardiff is part of a global operation providing integrated information and technology applications in the financial services industry. In Cardiff nearly all of the 80 staff are recruited locally, and their language skills are rated more highly than financial or technology experience. They use computer based language training supplied by Thomson's own university to enhance staff language skills.

Thomson Financial is one of the most complete sources for integrated information and technology applications in the global financial services industry. With 7,700 employees in total worldwide and niche markets in different sectors, it provides the top end of financial management with information and solutions to inform financial decision making.

With a focus on Europe, the Middle East and Africa, Thomson Financial Cardiff provides financial intelligence in terms of Ownership, Profiles and Estimates data. In its sector there is high demand for many foreign languages including French, German, Spanish, Italian, Dutch, Norwegian, Danish, Swedish, Finnish, Portuguese, and Japanese. Thomson Financial Cardiff has recruited nearly all of its 80 staff, 50 percent of whom are new graduates originating from different countries, from the Cardiff area. During the selection process, language skills are rated of greater importance than any financial or technology experience. All employees are required to have fluency in specific languages, as the daily work of an employee is language-specialised telephone investigative work or internet-based research using foreign languages.

Phil Davies, General Manager of Thomson Financial Cardiff, predicts that there will be increasing demand in language use in the Cardiff office since their targeted market is expanding to include Eastern Europe, in particular Russia, Ukraine, Poland, Hungary and Turkey. From his management experience in Cardiff, there has been no problem recruiting high calibre analysts with linguistic ability and so language skills have become a focus of the company's expertise. The Cardiff office is seen as a centre of language excellence.

At present, the company uses its own Thomson University to enhance its staff's language skills through computer-based language training. They believe speaking a client's language is the most effective way to collect local market intelligence. With so many nationalities and languages in the same organisation, teamworking can be lots of fun, full of different personalities and cultural surprises!

6.4. East Midlands

6.4.1. TriMark Europe

TriMark Europe recently moved to new premises in Coalville, Leicestershire, from where it distributes heavy-duty vehicle door hardware such as handles, latches and locks to the whole of the European market. A winner in the small business category at the 2003 East Midlands Language for Export Awards, it is well aware of the central role of language competence in winning overseas business.

"A fundamental part of our strategy is to bring European languages into TriMark," says Keith Dolbear, Managing Director. France is the company's most important export market, where it is now well established. *"One of the reasons for our success in France has been the recruitment of French students on work placement,"* says Keith. *"They have developed relationships with new distributors and clients in a way that wouldn't otherwise have been possible, and they have also given us some subtle insights into the French way of doing business."*

In 2002, TriMark took on a French postgraduate student in business and languages, Nathalie Gouezel, whose fluency in French, German and English was the main reason for her selection. Her German skills were particularly useful as the company was very keen to establish a stronger position in the German market through recruitment of a local agent. *"As well as helping us in France, Nathalie has been instrumental in our entry to the German market,"* comments Keith. *"We couldn't have done it without her."*

Nathalie's placement was so successful that she has stayed with TriMark and is now a full-time employee, making an important contribution to the business with her language and other skills.

This is not to say that English-speaking managers have not also played a role. Greg Tebb is Sales Manager at the company, and has undertaken French training since he joined; he is now capable of holding a business meeting in French. He comments: *"As well as giving me confidence, my ability to do business in French has made TriMark more credible with our clients. They really appreciate the efforts I have made."* The firm is now considering further language training for its other customer-facing staff.

Although a subsidiary of a large American corporation which manufactures the door hardware products, TriMark Europe is a comparatively small concern, with only twelve employees at the Coalville site. However, the team has achieved notable success in export markets in recent times: sales outside the UK have risen from 31% of turnover in 2000 to over half of it today. *“Being able to respond to customer needs in their own language has been an important part of this success,”* comments Keith Dolbear. *“At a simple level, they know they can pick up the phone to us and find someone who can speak to them in their mother tongue. That makes us accessible, responsive and easy to do business with.”*

The company’s enthusiasm for languages extends to its literature and website too. The entire website is available in French, German and Italian as well as English, with the latest product and company news also on-line in the other three languages. *“We see this as vital for export sales,”* remarks Keith. The firm was the first in its industry to develop a multilingual website, and worked with a well-established and professional agency to ensure that the content was accurate. In such a specialised field, this attention to detail has proved critical, avoiding any potentially embarrassing or misleading translations.

TriMark has a clear strategy for the future, with an objective to double its turnover by 2008. Keith Dolbear is in no doubt: *“We’re confident that we’ll achieve this ambitious target; I’m also certain that languages will play a big part in getting us there.”*

6.4.2. Classic Motos

Classic motorcycle part suppliers, Classic Motos of Leicester, have used their languages skills to boost sales in France by 30%. With help from UK Trade and Investment’s Passport to Export Scheme the two business partners have developed a multilingual catalogue and website which has helped them overcome French customers’ wariness to trade with a ‘foreign’ company.

Classic Motos Ltd employs three people and a French student on work placement at their Leicester base. The company sources parts for classic British motorcycles from the 1940s to 1970s, such as the Triumph, Norton and BSA. 80% of sales are to France but the company also sells to Germany and Belgium.

Language skills and an understanding of the French market have been essential in securing success on the other side of the Channel: the company now has 1500 customers in France alone. One partner is French and speaks good German; the other is a UK-born linguist who speaks fluent French and German.

The company has undertaken several measures to overcome barriers to doing business with France and has established a French language website, catalogue and a French mailing address.

The partners’ ability to understand and communicate in French, coupled with an in-depth knowledge of the country and its cultural differences and business norms, have been vital in getting the business established and winning valuable customers.

Lorraine Harris, a partner in the company, said: *“Setting up the multilingual catalogue and website has been crucial in boosting our sales in France. We’re now hoping for the same success in Germany. One thing we know is that our language skills and understanding of the culture will be fundamental in doing this.”*

6.5. East of England

6.5.1. Apertech

Apertech is a two-man consultancy business based in Harlington, Bedfordshire. The business trades with most countries which have an established agricultural base, in particular the USA and Australia, and is also moving into the South American market. The company provides technical support and reagents for special forms of micro-measurement, with diverse applications ranging from controlling grinding processes of mineral extraction to stem cell technology.

In addition to its work in Bolivia and Chile, many of the company's clients in the southern states of the USA speak Spanish as their first language. John Harfield, Director, has been attending a European-funded Spanish course at the University of Luton, and has been able to build his language skills to a high level of competence. As a result this has made direct communication with clients possible. *"If our labels are in these languages it produces a much more professional international appearance. It is also easier to establish a rapport in South America with distributors and clients if they can communicate with you in their own language, even if they're well mentally geared up to dealing in English,"* says John.

Asked whether the company had lost business as a result of inadequate language skills, John tells of a misunderstanding with a German client of what a particular product could do - *"I was not able to mollify the client sufficiently at a time when exchange rates were hard, nor was I able to persuade him sufficiently of the benefits of the product."* Unfortunately the client spoke only limited English.

Apertech uses the language mostly for repetitive response to enquiries, such as responding with appropriate replies and documentation. *"We do not have to wait for correspondence to be translated and come back to us. We therefore have more flexibility and better speed of response."*

Asked about his experiences of the course, John stated that *"it provided the language contact experience that you lack working remotely with overseas clients. When I found out about the course I had three choices - ignore it, extend my knowledge of a language I had, or take an entirely different language. The programme made it clear which potential business I could aim for, and although we are a small business, language and culture is now incorporated into our corporate thinking."*

6.5.2. Club Notice Board

Club Notice Board (CNB), a Suffolk-based small business with 6 staff, has been building web sites for over eighty golf courses around the country for the last five years, and has recently broken into overseas markets both in Europe and beyond. Visitors from over sixty one countries also access their websites, with a staggering six point four million hits last year alone.

The company's presence in China started last year when Ian Duncan, who runs CNB, responded to an enquiry from China via their website in 2004, in which he was invited to visit the Guangzhou Golf Show. Although the company felt it could not justify taking stand space at the show, it did offer to help in the development of golf in China.

Ian confirms that he was the only Englishman involved in the development during his visit to China, yet many other nationalities were represented. As Ian possessed no knowledge of the Chinese language at the time, and his Chinese contacts spoke little or no English, he *“spent much of the time sitting on the stand in silence!”*

“The most embarrassing part of going to China was not being able to understand much of what was said. When on the golf course I couldn’t even perform a basic task such as ask the caddies their name. I was talking to the top people in the Chinese golfing circles and couldn’t even have a conversation with them.”

On his return to England and subsequent participation in the UK Trade & Investment Passport to Export programme, Ian heard about the European-funded Language and Culture for Business programme in Suffolk, which was about to start a beginners course for local businesses via video-conferencing out of a learning centre in Eye.

Ian promptly jumped at the opportunity to learn Chinese. Says Ian, *“everybody said it was a hard language to learn, but I looked forward to Tuesday mornings, as it was so much fun and I could network with other clients. I had to work hard at it, but although I’m fifty I didn’t find that I was too old to learn”*. The most useful topics were introducing oneself, hotel bookings and business talk (meetings), and general social ice-breaker sentences were most useful. Ian also managed to practice on his Chinese neighbours and the local takeaway!

Noticing the distinct competitive advantage that a knowledge of the language can bring, Ian confirms that *“now when I visit China, the Chinese fall over themselves with my basic conversation, but I am the only foreigner in the development group who could speak Chinese, and my standing in the peer group was enhanced considerably. To be able to go out for a meal and order the food on behalf of the US and Finnish managers was a definite bonus – not only were they impressed but the Chinese were amazed, as at first they weren’t expecting me to talk in Chinese. I was far more confident, and was also able to negotiate with the taxi driver whom I knew was overcharging me.”*

CNB confirm that culture is just as important, and they were able to combine a trip to China whilst the course in Suffolk was taking place. The ability to converse even at a basic level showed itself as a powerful tool, and also demonstrated CNB’s commitment to the Chinese market. Says Ian, *“there are lots of opportunities to chat on a golf course, and I was even able to compliment my Chinese partners on good shots.”*

6.6. London

6.6.1. EDF Energy

EDF Energy, part of EDF Group, has become a familiar name in the competitive UK utilities market. EDF Energy was created in 2003 and now employs around 13,000 staff. The company provides power to a quarter of the UK’s population via its electricity distribution networks in London, the South East and the East of England and supplies gas and electricity to over 5 million customers. With its head office in London, it also has large teams based in the North East, South West and South East of England.

French is the official corporate language of EDF Group– although many senior company executives regularly use English for networking and international meetings.

On the operational and technical level, however, knowledge of the French language is valuable – as many key employees in France, especially beyond Paris, do not speak English. All executive PAs also need to be bilingual, and those involved with international projects find a working knowledge of the French language very helpful.

With these needs in mind, the Learning and Development team at EDF Energy looked to develop a UK-wide approach to their language training offer to employees – in order that staff could receive a consistent standard of training that was above all fit for purpose. In 2004, they appointed a BLIS Professionals provider to plan and undertake the training.

There were requirements that the provider needed to keep in mind while developing the programme. EDF Energy needed to align learner achievement with their own language proficiency standards so that abilities could be assessed company-wide. They needed a system which would enable them to prioritise the needs of the learner as well as decide on the tuition type (one-to-one, classroom-based or self-study).

Local line managers are responsible for identifying training needs according to the business case – and organising the individual's attendance. In each case, the training includes a business focus – so they can immediately relate what they have learned to the job they are doing. Training can be offered in a range of languages, reflecting the company's links with other parts of the EDF Group in Europe and beyond, though in practice the vast majority of training is in French.

Collaboration has been an overwhelming success. Since their appointment, the provider has trained over 100 EDF Energy staff. Learning and Development Project Manager Kelly Gilmartin was directly involved in developing the programme – and firmly believes in the value of language learning, in terms of working for EDF Energy and beyond. *“What a great career advantage it is to have another language as well as English. Knowledge of French really helps not only in daily transactions, but in understanding EDF's company culture.”*

6.6.2. Northern Edge International Limited

Northern Edge prides itself on being at the forefront of a very niche market. It was founded in 1999 to market and distribute a new health food - organic milled flax seed – initially in the UK. Based in Ilford, Northern Edge is now the leading global supplier of the flax seed, selling to established retailers in the UK such as Harrods and Sainsbury's. In addition, it works in partnership with another organisation to make worldwide Internet sales. Yet it remains a small company, with just three employees. The company's approach illustrates how a small business can gain access to the language and cultural expertise needed for international success.

‘From the start, we recognised that replicating our UK success in international markets would require an understanding of different dietary cultures,’ says Max Brookman, Northern Edge's Marketing Manager, *‘together with an understanding of how best to market the product abroad’*. Whereas the British readily accept the notion of sprinkling a food supplement onto their breakfast cereal, a different product format and marketing strategy is needed in, for example, Southern Europe.

Northern Edge's key European markets are Spain, France and Germany. 'We needed to educate potential retailers and consumers in those countries of the health benefits of flax seed,' continues Mr Brookman. 'A multilingual website is an important, yet cost-effective, means of achieving this'. Accordingly, Northern Edge's entire main website is available in Spanish. As a result, Northern Edge now has several contacts in Spain. Work is progressing on website pages in French, to be followed by German.

As a small company, Northern Edge decided to leverage its position by appointing a European export business agent. With the agent's assistance, Northern Edge has benefited from a presence at a number of international exhibitions and has prepared product labels in Spanish and French, which incorporate translated usage instructions. The agent follows up sales leads using a team of local native speakers.

'We are pleased with the results we have achieved by working with our agent', comments Mr Brookman, 'but we recognise that we can achieve even greater sales success when we ourselves speak our customers' language'. Mr Brookman has a degree in French and finds that any attempt to communicate in French helps to build a rapport with his French customers. 'They really appreciate any attempt I make to use French in our dealings, even if my technical French isn't good enough to finalise the deal'.

'Our business has expanded as the health food market has grown all round the world', concludes Mr Brookman. 'Our foreign language website and language skills have assisted our expansion'.

6.7. North East

6.7.1. Pride Valley Foods

International success tastes good for County Durham-based Pride Valley Foods. The Seaham firm manufactures speciality naan breads, tortilla wraps and pitta bread and with a turnover of £22 million, is recognised as the UK's market leader in speciality breads. Established in 1990 by Chairman Hossain Rezaei, the company now employs over 245 people and is reaping the rewards of its commitment to export communications.

But even with such impressive statistics, the business was not going to rest on its laurels: "We are the UK's leading manufacturer of flatbreads," says Mike Shear, Senior National Account Manager. "Yet, there is only so far you can go in the UK market. Our next step had to be mainland Europe. Ours are well known products in the UK, but in Europe they are unique and innovative."

But the company was faced with a conundrum. To render the products suitable for export, they all needed repackaging. How could it expand the business without expanding the production plant to repack all the products to be exported, and all the increased costs that would involve?

Their answer was what Mike describes as "a simple solution to a huge problem". Pride Valley Foods decided to produce a single packet with a cardboard insert that featured ingredients, recipe ideas and product information in six key languages: English, French, Dutch, German, Danish and Spanish.

Pride Valley's export sales now stand at 12.5 per cent of turnover, covering countries such as Germany, Denmark, the Netherlands, Spain, Sweden and - as of May 2005 - France. So the six languages featured on the generic inserts covered all linguistic requirements.

Mike, whose enterprise earned him an award for Individual Achievement at the North East chamber of Commerce 2005 Export Awards, explains: "We wanted the product and packaging to be informative and attractive to a European market."

And communicating with its customers was not the only benefit of investing in a translation programme. One of the key reasons the business looked to build markets was to support further employment.

Pride Valley Foods continues to invest in new multilingual packaging which has included the investment of £1100 in the translation of ingredient declarations, enabling the company to access almost £450 in financial assistance through the ERDF-backed funding from the Regional Language Network North East. Mike says that has been essential: *"Every bit helps. The resource is there to help us - it is invaluable."*

And this is just the start of a rolling programme of language work. Pride Valley is now ready to start translating more company material to launch even more innovative products to the new markets and Mike fully intends to maximise the help available.

As a direct result of improving international communications, Mike has widened the company's markets and improved customer communication.

6.7.2. Canford Audio PLC

When Washington-based Canford Audio plc grabbed its French operation by the horns and "went native" the result could hardly have been more dramatic, with sales immediately surging by 45 per cent.

Production in French of the company's 1,000-page catalogue cost a cool £50,000 for translation alone, but France is now the company's second market, with Canford's wholly-owned subsidiary contributing close to £1 million out of a total turnover of about £15 million.

And Canford Chairman Hugh Morgan Williams is adamant that the huge success they've had in their export markets is all down to speaking the customer's language. *"We try to make it as easy for someone to do business with us in Stockholm as it would be in Sunderland,"* says Hugh.

Canford was established in 1978, in Newcastle, as a one-stop shop for the supply of components, such as speakers and headsets, for the radio industry. Its first catalogue was produced in 1982, since when, says Hugh, it has become very much the "bible" for the broadcasting industry, in terms of product range and availability.

Four years later, the company moved to Washington, where it now manufactures about a quarter of its product range by volume.

At that time, the company employed about 20 people and was turning over about £1.5 million. *"Since then the company has grown and in the early 90s we started developing our export business further, it having previously been purely passive,"* says Hugh.

"We did some market research that indicated that we needed to speak French, and that led to the setting up of our French office in 1993. We were lucky in having identified someone to head it who was bilingual. That language resource is particularly important in the European market, which accounts for about 60 per cent of our exports. Once we had created a dedicated language resource in 1993, we found it made a huge difference in terms of our export performance."

Hugh explains that the first step was the supply of marketing literature in a range of key European languages. *"Currently, we support Italian, Spanish, French, German and Dutch. As well as the basic marketing literature, the catalogue is completely translated into French and the product descriptions and technical information are translated into German for their respective markets."*

Canford has invested significantly in boosting its in-house language skills base at Washington, with about five per cent of the 200-strong workforce fluent in at least one, and often two other languages, and another five per cent able to understand at least one other language than English.

And these skills are important from the warehouse up. One warehouse worker went to college to learn Spanish, and the credit control for France is run from Washington. *"We even have someone who can swear in Gaelic, which can help in Ireland!"* says Hugh.

The linguistic capabilities of staff are vital and Canford will invest significantly in staff with language skills. *"One of them has three foreign languages and we pay a premium of £1,500 per language, increased from £1,000, for that."* And, encouragingly, most of Canford's linguists are British rather than foreign nationals.

Canford's main export markets are France and Germany, but it is also active in Spain, Italy, Scandinavia, Central and Eastern Europe and the Middle East is a very important market too.

So what is Hugh's advice to younger companies contemplating a move into export markets? Despite the initial outlay, Hugh knows exactly what is essential: linguistic and cultural awareness, *"If you are a small manufacturer there is no doubt that to take on linguistic support is expensive, but if you are going to hire new staff anyway, you should look for language skills as well."*

"You must ensure that you have some language resources to call upon when it's necessary and the other thing is to make sure you do one country at a time - otherwise you end up with difficulties."

But for now, difficulties are one thing Canford is not experiencing. In fact, France has become so key to the business, that its market acts as the proverbial Litmus test: *"We said that if we could make things work in France we could make them work anywhere, because it is the most difficult market. So France has become a test bed - if it works there, it's likely to work anywhere."*

The company is currently working on a full translation into French of its website. This follows completion of the German site in 2003, which in turn led to an important shift in the way Canford addresses that key market. Canford decided to bring its German-speaking customer support staff in-house at Washington, closing the German office. This change has yielded a rise in turnover in that market of up to 60 per cent.

6.8. North West

6.8.1. Craglands Gift Shop

As a well established gift shop in the Lake District, Craglands is known far and wide for its high quality knitwear and clothing goods. This has earned it a strong reputation, both with local customers and the many overseas visitors the Lake District welcomes each year.

As well as providing premium garments and goods, Craglands prides itself on delivering the highest standard of service to all of its customers. However, with the number of overseas visitors to the area increasing year on year, manager Christine Shaw realised that to ensure continued customer satisfaction, any language and cultural barriers would have to be overcome.

Christine explains: *“As international travel for pleasure becomes easier and cheaper for people, we will continue to see a rise in the number of foreign customers we entertain. At Craglands we noticed a particular increase in the number of visitors we received from Japan, so we started to look at how we could improve our customer service through a better understanding of the Japanese culture.”*

Christine considered every aspect of the service provided in the gift shop and set about finding ways to make the environment more welcoming to the Japanese audience. This involved both written and spoken communication and understanding cultural practice.

Each year Craglands employs seasonal staff with linguistic skills. During one summer, Christine worked with an Indian student who could also speak Japanese. Delighted that they could communicate in their own language, sales to Japanese customers increased, which inspired Christine to pursue Japanese lessons herself. By undertaking Japanese lessons at a local school, Christine mastered a number of conversational phrases that would make her international customers feel more at ease when browsing the gift shop. It also prompted Christine to form the ‘Banzai Society’, which is a group of local people who get together to share Japanese experiences and practise their language skills. By doing so each member is able to increase their knowledge of the Japanese culture and improve their conversational technique.

Christine describes a key cultural learning point: *“One of the things I have learned about the Japanese culture is that the number four is considered to be unlucky – so I have made sure no prices in the gift shop include that number. I also know that the colour brown for clothing is unfavourable, so I do not sell any outer garments in this colour.”*

In addition to Christine’s personal efforts to deliver an internationally friendly service, printed literature was translated into Japanese and a number of other languages, including Spanish and French. As well as the gift shop leaflet, signs throughout the shop and tax exemption forms were translated into different languages. So at every point of the shopping experience customers would be able to communicate, even if they were unable to speak English.

The obvious benefit of helping customers to overcome basic communication barriers is that they will feel more comfortable and confident in their surroundings and as a result more likely to want to make a purchase.

Christine feels that translating the literature into different languages has helped to bring in more business. She explains: *“Customers who have visited the shop return home and tell their friends about both the garments we sell and the fact that we make such an effort to welcome them. As a result, we very often receive further orders over the internet.”*

6.8.2. Manchester City Council

Having effectively implemented a number of regeneration projects in the Manchester area, Manchester City Council saw an opportunity to showcase its success stories to potential investors from overseas. Where these visits included politicians, the City Council would take the lead to ensure that the delegations met with Manchester politicians and other senior officers to discuss trade and investment agenda. Where the delegation was purely interested in trade, then ChamberLink, a key business partnership supported by UK Trade and Investment would take the lead.

Being involved with such visits prompted Rukshana Mahimwala, Economic Development Officer for Manchester City Council, to take a deeper interest in the cultural practices of international visitors. Rukshana explains: *“We were looking after an increasing number of visitors from overseas, which presented opportunities for investment in the Manchester area. An interpreter would normally be present, but we wanted to go the extra mile and learn more about their cultural practices – to demonstrate that we were serious about working with them.”*

To gain greater understanding of international cultural practices, Rukshana attended a formal presentation organised by ChamberLink. From this she developed her knowledge further by networking with others who had experience of working with international visitors. By doing so, Rukshana was able to brief people prior to functions as to the most appropriate dinner dress or greeting custom, according to nationality. Business and etiquette protocol is extremely important and should be observed.

Rukshana was also careful to do her homework when choosing a new token gift to give to political delegations visiting Manchester. She explains: *“Each year we choose a gift that all of the Council’s overseas visitors would receive. When the occasion required, we initially thought a clock would be a neutral present. However, after consulting several people about cultural beliefs across the globe, we discovered that it actually symbolises death to the Chinese. As such, we opted for a piece of cut glass with the Council logo engraved on it.”*

As well as developing cultural understanding when hosting political delegations, Rukshana works with ChamberLink when an international trade delegation is due to visit Manchester. To match the business interests of the international visitors with local companies, investment seminars are organised, giving both the investors and the companies an opportunity to meet one another. To assist with these activities, Rukshana is on hand to provide advice, should it be required, with regards to appropriate behaviour and culture practice.

As a result of organising the international seminars and ensuring they run smoothly, positive economic results have been achieved in Manchester. Rukshana comments: *“There was one instance where a textile company was on the verge of going into liquidation because sufficient business was not coming in. After attending an international investment seminar, they connected with the visiting delegation and secured a partnership, which enabled them to continue trading.”*

The success story of the textile company was repeated when Manchester City Council hosted a Chinese political delegation. Discussions regarding sports and leisure activity led to a British delegation going out to Beijing to promote football. Indirectly this will bring in business for sportswear manufacturers in the area: Rukshana explains: *“Visits such as these open up future opportunities to trade with the country, in this case for sportswear manufacturers who are well placed to supply football kit.”*

A similar visit also created opportunities for the construction industry. With such a lot of development work taking place in China, in preparation for the Olympics, there is now potential for Manchester construction companies to tender for big contracts – dialogue has been opened between the city and the governing parties. A leading Manchester company has already secured a major contract in the lead up period for the 2008 Beijing Olympics.

Manchester Regeneration Programmes are attracting international interest across the globe and there have been delegations from a number of countries, including China, Japan, Spain, Denmark, Finland, Lille, Switzerland and Saudi Arabia.

6.9. South East

6.9.1. Neural Technologies Ltd

Neural Technologies Ltd, based in Petersfield near Portsmouth (Hampshire), provides IT solutions to detect fraud and protect revenue. The company works primarily with the financial and telecoms markets to which its flagship, state-of-the-art software, Minotaur, is primarily dedicated. As Luke Taylor, Marketing Manager to Neural Technologies Ltd, points out: *‘Neural Technologies’ Minotaur™ fraud management solution comprises a whole range of features to detect new and evolving fraud types both quickly and effectively’*. In order to help focus the company’s overseas market communications, Neural Technologies looked to the Export Communications Review Service (ECR) of UK Trade & Investment.

The ECR helped, in the words of Luke Taylor, *‘to give the company a better understanding of the export potential, the confidence and the knowledge needed to take forward strategies into the global marketplace and to highlight areas of possible improvement and recommendations for better business practices’*.

‘Following the one-day review’, continued Luke, *‘we looked to our overseas markets with greater enthusiasm and improved strategies’*. Communicating with current and future clients in their own language was identified as a key initiative. Close collaboration between Luke and fluent Spanish speaker Louise Penson, Marketing Executive to Neural Technologies, ensured an action plan was soon in place

A partnership was formed with a company in Chile, which had been exploring opportunities for market sector penetration throughout Latin America. These new colleagues in Chile handled translation of the Neural Technologies brochure, case studies and fact sheets into Spanish. The main contact in Chile is a Spanish native speaker and has knowledge of the industry.

The next step was to look eastwards: so the brochure was translated into Japanese. All literature and translated versions are readily downloadable from the company's website.

A User Forum was launched which involved inviting the company's clients to visit the UK for a two-day business meeting and social activities (at HMS Warrior and Hampton Court). Among the many in attendance were two representatives from the company's Mexican client. They could speak some English but they certainly appreciated the correspondence sent to them beforehand being in Spanish and the fact that at the event they were regularly spoken to in their native tongue.

Luke Taylor summed up the impact of these measures; '*We've certainly reaped dividends with new and better relationships round the globe and, what's more important, increased sales*'.

Although it is early days in the development of Neural Technologies international communications strategy, the success of initiatives so far points the way for the future. The recently launched company newsletter will also be translated into other languages, as Luke and his colleagues realise that the best language is always the one the customer speaks!

6.10. South West

6.10.1. Air Control Industries

Air Control Industries Ltd (ACI) was established in 1969 and is based in Chard, Somerset. The company supplies a wide range of high-specification, small to medium-size industrial fan units for virtually all industrial applications ranging from extraction, cooling and ventilation to aeration and surface drying processes. They offer everything from a complete design and manufacturing service, right through to the supply of individual fans and blowers. Their annual turnover is £6 million and there are some forty people employed at the Chard plant.

Amongst their customers in the UK are Jaguar (who use ACI fans for rapid post paint-shop drying) and Vodafone (who got a retail designer to create a snowscene in a West End mobile-phone store last Christmas using ACI products).

But around 42% of their business is in exports (33% to Europe), and they currently have nominated agents in 17 countries around the world, from Spain to South Africa and Belgium to Brazil. Although a number of these agents are in English-speaking countries, most of them are not and that is why ACI recognises the value of using other languages for their export business.

Paul Tuffin said: "*Use of language and culture is critical to our business. Half of ACI's European sales are to Germany, so our entire website is available in German and it will also be available in French, Spanish and Italian in the near future. The translation of operating and instruction manuals into other languages is essential, with over 20 language versions available for a range of products, including Russian, Chinese, Romanian, Turkish and Croatian. We have also had promotional material translated into French, German and Spanish. If we are serious about expanding our overseas business, we have to be able to work in other languages.*"

ACI got their German partners, Carl von Gehlen, to do the web translation, but for other languages they have used the services of a professional agency, Multidicta (based in Leeds). Paul added: *“We are very satisfied with the translation agency that we use, but we found it helpful to learn about alternatives from RLN, as well as about other services available.”*

Peter Gold, of RLN-SW, was very impressed by the extent to which ACI was engaged in using languages to support and promote its export activities. *“There is obviously scope for ACI to do more, but if all exporting companies in the region were as aware of the value of using languages as ACI is, the South-West would certainly not be at the bottom of the export league.”*

6.11. West Midlands

6.11.1. Geothermal Heating International Ltd

Geothermal Heating International Ltd are the recent winners of the Passport Award ‘Best use of language within international strategy’.

The Coventry-based company has increased its export sales eightfold since joining the Passport to Export programme in February 2004.

The company designs heating and cooling systems powered by cheap, renewable energy drawn from underground, and also provides technical support and training. It has taken advantage of the range of services available through the Passport scheme – such as training, mentoring, market research and translation support – in formulating and implementing its export strategy.

Key to this strategy is Geothermal Heating’s policy of employing native speakers to communicate better with overseas customers and agents. Its 12 employees can speak Italian, French, Czech, Spanish, Slovakian, German and Japanese.

To date, the company has appointed overseas distributors in Spain, Portugal, Greece and Russia, who have secured overseas sales of well over £100,000.

It is now aiming to keep up the rapid international expansion by appointing dealers in Saudi Arabia, Hungary, Italy, Germany and Bulgaria.

Managing director Brian Davidson said:

“UK Trade & Investment tailored the Passport programme to our needs, helping us to realise our international business potential, and playing a key role in our export success.”

6.11.2. Synchro Systems Ltd

Synchro Systems Ltd, based in Newcastle-under-Lyme, provides ticketing and membership software for major sports tournaments, premierships and other league football clubs, including Arsenal, Aston Villa, Birmingham City, Celtic and Manchester United. They also include all but one of the county cricket clubs, all home rugby union clubs and theatres including the Royal Opera House, Nottingham Royal Centre and the Royal Concert Hall in Glasgow, in their list of customers.

The company, who employs 65 staff, have exported their Venuemaster software to Australia, South Africa, Malaysia and various parts of Europe. Although they have

experienced English speaking interaction in these countries, staff have recognised that it is better to be able to communicate in the local language as well, even if only on a basic level in order to instruct taxi drivers and hotel staff.

To improve international communications, Synchro Systems has used a variety of methods including recruiting staff with a basic level of language skills and employing translators to enable written documentation to be understood by the target market. It has also made use of the local skills base, as General Manager (Director) Carol Leach states:

“When visiting potential customers in Russia, we employed language students from the local University at Keele to help us with our project delivery.”

More recently, the team at Synchro has taken advantage of the ConnectFree programme of language training, organised through Newcastle-under-Lyme College. This scheme, offering free language training to local businesses, has enabled the company to introduce some foreign language communication into their day-to-day contact with clients. It is difficult to measure the success of this training as Synchro Systems is the specialist supplier in its field, it has however been helpful on an individual basis, as staff who were involved now feel much more confident and relaxed about conducting business overseas in French, Spanish, German and Italian, and can meet, greet and converse basically with international customers.

As the company continues to pursue activities overseas, General Manager, Carol Leach believes that language skills will infiltrate all parts of the company and will be a necessity for those working on the technical helpdesk. Synchro Systems has proven that even a little investment in language learning will take you a long way, as Carol states:

“I continue to be astounded that a lot of UK companies feel it acceptable to communicate in English with an assumption that everyone else will accommodate their inadequacy. I would urge all companies to make the effort to make some communication in the client or partner language.”

6.12. Yorkshire and the Humber

6.12.1. Industrial Textiles & Plastics Ltd

Established in 1989, Industrial Textiles & Plastics Ltd (ITP) of Easingwold produces technical textiles and special engineered fabrics for a variety of markets as diverse as building and civil engineering, automotive and transport, agriculture and horticulture, healthcare and defence. These are sold throughout the UK and exported to Europe and North America.

Like many companies, their development began in the UK with domestic sales and then moved into export markets later. Initially, ITP began to target English-speaking markets such as the US, Canada and Australia but even at this early stage and before the need for other languages, they realised the importance of cultural awareness. As Marc Van Der Voort, the Managing Director explains, they had to take a close look at everything from the products themselves to the technical requirements and the content of sales literature. *“We had to research each country to ensure that our products were the right size, conformed to the local Standards, passed the relevant technical tests and furthermore, we had to translate the literature*

and print it on the right paper size. The US for example utilises Letter size rather than A4 and American English can be quite different in spelling let alone meaning."

The success achieved in the English-speaking markets and the lessons learned there also became useful when the company moved into Europe. *"We firstly targeted Sweden and Norway and we soon learnt that we needed to have good product availability. This led to us establishing a warehouse facility in Scandinavia."* explains Marc. *"As a customer-focused organisation, this logistics facility has given us a tremendous advantage cutting delivery times for our Swedish and Norwegian customers and it even enables customers to collect their orders. Without in-house language capability, this warehouse would have been impossible to establish let alone manage."*

Without languages the company would have found it difficult to communicate particularly about new developments and new technologies. *"Effective communication is quite a challenge and we cannot expect our overseas customers to have an in-depth understanding of English, especially when it comes to technical matters. To succeed with exports, it is very important to have every aspect of communication available in the relevant language. This includes products labelling, sales and technical literature and the website. Your staff must also have an understanding of the language and a grasp of the technical issues relevant to the customer's particular market. It is no good trying to sell metric when the customer is used to feet and inches."*

The company now boasts skills in ten different languages including Swedish, Norwegian, Dutch as well as more widely spoken languages such as German, French, Spanish and Italian. Whilst the abilities in each of the languages are not necessarily fluent, Marc and his staff are keen to begin the initial dialogue in the customer's native tongue. *"It's not fair to expect our customers or indeed suppliers to speak English all the time. We try our best and even if we can't offer fluency we make our introductions in their language. Most people appreciate the fact that you have tried to speak their language. This really helps in the relationship despite the fact that the on-going business may well be conducted in English."*

The further development of the company internationally has now seen them move into other parts of Europe and they view exports as an important future development.

6.13. Conclusions

Businesses in Britain that decide to trade in non English speaking countries share a range of factors that influence their progress.

6.13.1. Language and culture

It is not untypical for businesses to begin export trading in English speaking countries, during which they begin to appreciate the importance of cultural differences and the need to take account of them. When it comes to exporting to non English speaking countries the importance of language coupled with culture is readily accepted as crucial to export success.

6.13.2. Approaches to language capability

Businesses use many different ways to carry out their business in non English speaking countries. These include: use of agents/distributors; partnerships with native businesses; foreign students on work placement; training existing staff; and, recruitment of bilingual or multilingual staff.

Many businesses review recruitment procedures to bring in language skills when recruiting new staff. In some businesses, language skills are ranked more highly than technical skills. Retention is also an issue, and premiums are often paid for language skills. Language training can be in-house or external, and businesses may seek to generate a culture of multilingualism.

Invariably companies have translated their websites and literature, taking care to ensure that they do not commit any embarrassing mistakes in terms of language or culture in the process.

6.13.3. Benefits of language capability

Businesses in the case studies invariably report significant and measurable benefit to their trading figures, and being able to use the language of the country is key to winning new and repeat business. In addition to this they see great benefits in their relations with clients and customers simply because they can communicate in their own language, and issues can also be dealt with more quickly.

Internally some businesses have seen the development of language capability leading to better relations between colleagues and new opportunities for staff.

6.13.4. External sources of help and advice

Many businesses have used external help, for example: UK Trade and Industry Export Communication Review Service; the original BLIS database of professional language service providers and subsequent regional databases; and the National and Regional Language Network services.

7. Conclusions on the demand for language and intercultural skills

Three aspects of government policy should have a fundamentally important influence on the demand for language and intercultural skills.

- The Leitch review has set the current UK skills agenda by outlining the case for investment in training and up-skilling the workforce across all sectors of the economy. There is a common recognition across all nations of the UK that the development of skills is key to improving productivity.
- UK policy has consistently sought to achieve further expansion of world trade on the basis that openness to trade can play an important role in raising the long term sustainable rate of productivity growth in the economy.
- There is also a common belief, as expressed through national language strategies that foreign language skills are of considerable importance to the economy.

Given government policy and the large body of evidence that recognises that languages play a fundamental role in facilitating international trade it is therefore surprising that there appears to be a market failure in relation to language skills in the UK. It has been estimated that this equates to about 5% of all British trade.

The Nuffield report in 2000 clearly indicated that UK business held a complacent view of the importance of languages based on the position of English as the world's business language and that the UK needed to dramatically develop its capability in language skills if it was to continue to be successful in the global economy. Since the publication of the Nuffield report a number of studies have also pointed to different aspects of the UK's deficit in the use of languages and intercultural skills by business.

Surveys have demonstrated that UK business performs relatively poorly compared to their European counterparts in respect of language strategies, acquiring staff with language skills, employing external language professionals, developing their websites and contemplating new markets. Indeed the UK is bottom of the European league table in terms of competence in other languages.

The Regional Language Skills Audits highlighted the dramatic impact of language skills shortages and gaps on actual or potential loss of business within different regions and nations of the UK.

There is some evidence that large and multinational companies in the UK have better developed language capacity than SMEs (although they did not always compare well with their continental counterparts). Research also suggest that underinvestment in overcoming the language barrier to exporting may be particularly marked for smaller firms

What is clear from the research conducted in relation to SMEs is that:

- Exporting SMEs would be more successful if they made greater and more planned use of language skills.

- By definition, SMEs lack the resource base of large enterprises and are thus less able to engage in capacity building activity where return on investment may be uncertain both in timescale and value.
- Interventions are desirable on the part of business support agencies to maximise opportunities, promote good practice and co-ordinate initiatives.

All the evidence available suggests that there would be large returns to the UK economy from effective intervention to improve language skills within SMEs.

Both the interviews conducted with businesses and other organisations and the review of good practice case studies reveal a range of range of factors that influence their progress in trading with non English speaking countries.

Approaches to language capability

Businesses use many different ways to carry out their business in non English speaking countries. These include: use of agents/distributors; partnerships with native businesses; foreign students on work placement; training existing staff; and, recruitment of bi-lingual or multilingual staff.

Invariably companies have translated their websites and literature, taking care to ensure that they do not commit any embarrassing mistakes in terms of language or culture in the process.

Many businesses have used external help, for example: UK Trade and Industry Export Communication Review Service; the original BLIS database of professional language service providers and subsequent regional databases; and the National and Regional Language Network services.

Current and future language skill needs

The preference in general, is for evidence of the ability to use a language (and even better, have experience of living within the culture) rather than simply a qualification in a language. Foreign language ability is valued by many employers, even where it is not essential to the job.

Many businesses review recruitment procedures to bring in language skills when recruiting new staff. In some businesses, language skills are ranked more highly than technical skills. Retention is also an issue, and premiums are often paid for language skills.

While skills gaps are not necessarily perceived, many employers have difficulty in filling positions requiring language skills.

The majority of employers see an increasing need for language skills, due to globalisation, business development and the need to be able to compete effectively.

Current and future language training provision

Language training can be in-house or external, and businesses may seek to generate a culture of multilingualism. However, many employers seem to be reactive in accessing provision, it doesn't seem to be planned and not many employers have a formal language strategy.

Comments about the quality of training provision were positive, with many stressing the need for flexibility and tailored or bespoke training.

The most common form of language provision is for 'topping up'; unless more expensive intensive or immersion training can be used, many see that if language skills have not been developed earlier, work place language training is too late.

Investment in language skills

It can be difficult to quantify the benefits of investing in language skills, but the majority feel that it makes a positive difference to their organisation, whether they have use of those skills in the immediate future or not.

Businesses in the case studies invariably report significant and measurable benefit to their trading figures, and being able to use the language of the country is key to winning new and repeat business. In addition to this they see great benefits in their relations with clients and customers simply because they can communicate in their own language, and issues can also be dealt with more quickly.

Internally some businesses have seen the development of language capability leading to better relations between colleagues and new opportunities for staff.

The high cost of investing in these skills for one organisation in which language skills are crucial has led them to reconsider how to retain those skills.

Intercultural skills

The articulation of needs, shortages and gaps in intercultural skills is often confused with 'language' or 'foreign language skills'. However, it is apparent that employers are increasingly demanding a wider degree of cultural understanding in response to the challenges of operating in an increasingly-integrated Europe and a globalising business environment.

It is not untypical for businesses to begin export trading in English speaking countries, during which they begin to appreciate the importance of cultural differences and the need to take account of them. When it comes to exporting to non English speaking countries the importance of language coupled with culture is readily accepted as crucial to export success.

These skills are considered important by all employers, as even in the rarer cases in which an organisation's workforce is not particularly diverse, there is always a need to work effectively with clients, customers and/or suppliers in different countries.

The need to manage multilingual/multicultural workforce has also been a challenge to many employers as a result of recent immigrant and migrant workers mainly from Eastern Europe but also from further afield. Existing managers and supervisors needed the additional skills of intercultural working whilst highly valued immigrant workers would, employers felt; integrate more easily into the work and social community if they acquired some intercultural skills. Whilst the multilingual make-up of the UK's workforce represents a management challenge it also clearly represents a significant opportunity for the UK in terms of language capability.

The realisation of the importance of intercultural skills has not, in many cases, yet been translated into utilising training provision. It is more often preferred that employees will already be able to demonstrate evidence of having acquired these skills previously, such as through having spent time living abroad as part of a university degree.

8. Language qualifications

8.1. Introduction

The purpose of this chapter is to provide an overview of the qualifications available in relation to languages within the UK. This is provided through a summary of foreign language intercultural skills qualifications currently available within:

- Secondary education (GCSE and A level)
- Vocational and Educational Training (VET)
- Higher Education

8.2. Secondary school qualifications

In addition to French, German, Irish, Spanish and Welsh, it is possible to study any one of 16 other languages at GCSE and A level: Arabic, Bengali, Chinese, Dutch, Gujarati, Italian, Japanese, Modern Greek, Modern Hebrew, Panjabi, Persian, Portuguese, Polish, Russian, Turkish and Urdu.

Table 8.1 provides a summary of GCSE examinations available in the UK through each Examination Board, including the type of course provision available in relation to each examination (Full linear course, full course modular, short course, tiered and coursework option).

Table 8.2 provides a summary of A level examinations available in the UK through each Examination Board. The A level examinations available in different languages are summarised under both AS level and Advanced GCE. The table also indicates whether there is a coursework option available in relation to each language.

- There are five main Examination Boards (also known as Awarding Bodies) in the UK in relation to GCSE and A level language examinations:
- **Assessment and Qualifications Alliance (AQA)** considers itself to be the largest of the three English exam boards. AQA has a leading reputation for promoting education for the public benefit and draws on long experience of setting and marking public exams such as GCSEs, A-levels and other qualifications. AQA award 51% of full course GCSEs and 43% of A-levels nationally.
- **The Council for the Curriculum, Examinations and Assessment (CCEA)** was established in April 1994 and is a non-departmental public body reporting to the Department of Education in Northern Ireland. CCEA is a unique educational body in the UK, bringing together the three areas of curriculum, examinations and assessment. CCEA advises government on what should be taught in Northern Ireland's schools and colleges and also is responsible for monitoring standards. It is also Northern Ireland's leading awarding body offering a diverse range of qualifications, such as GCSEs, GCE A and AS levels, Entry Level Qualifications, and Graded Objectives in Modern Languages.

- **Edexcel** is one of the UK's largest awarding bodies and is part of Pearson plc, the world's largest education services company. Edexcel offers a range of services, including Curriculum and qualification development, Training and support for teachers and examiners, Exam setting, Testing, Marking and assessment and Certification. In the UK, Edexcel works with more than 5,000 secondary schools, 450 further education colleges, 70 higher education institutions and more than 700 employers and training providers. The company is also responsible for marking the national Key Stage 2 and 3 tests, working with 20,000 junior schools. The company offers a wide variety of both vocational and general qualifications, including BTEC, GCSE in vocational subjects, GNVQ, Advanced VCE, GCSE, GCE AS and A Level.
- **Oxford Cambridge and RSA Examinations (OCR)** are a leading UK awarding body, providing a wide range of qualifications to meet the needs of learners of all ages and abilities at school, college, in work or through part-time learning programmes. OCR offers a wide range of General and Vocational qualifications working with a range of education providers including schools, colleges, workplaces and other institutions in the public and private sector. Over 13,000 Centres use OCR A Levels, GCSEs and vocational qualifications including OCR Nationals, NVQs and Basic Skills.
- **WJEC** was previously called the Welsh Joint Education Committee. It was established in 1948 as a consortium of local education authorities in Wales. It is now a registered charity, and a company limited by guarantee, owned by the 22 local authorities in Wales. Now WJEC provides examinations, assessment, professional development, educational resources, support for adults who wish to learn Welsh and access to youth arts activities. It also provides examinations throughout England. WJEC's qualifications include traditional academic and work-related subjects at Entry Level, GCSE and AS/A Level, as well as and Key Skills.

Table 8.1: Summary of GCSE examinations

Language	Board	Full course linear	Full course modular	Short course	Tiered	Coursework option
Arabic *	Edexcel	Yes	No	No	No	No
Bengali	AQA	Yes	No	No	Yes	No
Chinese * (Mandarin / Cantonese)	Edexcel	Yes	No	No	No	No
Dutch	OCR	Yes	No	No	No	No
French	AQA	Yes	Yes	Yes	Yes	Yes
	Edexcel	Yes	No	Yes	Yes	Yes
	CCEA	Yes	No	Yes	Yes	No
	WJEC	No	Yes	No	No	No
German	AQA	Yes	Yes	Yes	Yes	Yes
	Edexcel	Yes	No	Yes	Yes	Yes
	CCEA	Yes	No	Yes	Yes	No
	WJEC	No	Yes	Yes	Yes	Yes
(Modern) Greek	Edexcel	Yes	No	No	No	No
Gujarati	OCR	Yes	No	No	Yes	Yes
(Modern) Hebrew	AQA	Yes	No	No	No	No
Irish	CCEA	Yes	No	Yes	Yes	No
Italian	AQA	Yes	No	No	Yes	Yes
	Edexcel	Yes	No	No	Yes	Yes
Japanese *	Edexcel	Yes	No	No	No	No
Persian	OCR	Yes	No	No	No	No
Panjabi	AQA	Yes	No	No	Yes	No
Polish	AQA	Yes	No	No	No	No
Portuguese	OCR	Yes	No	No	No	No
Russian	Edexcel	Yes	No	No	No	No
Spanish	AQA	Yes		Yes	Yes	Yes
	Edexcel	Yes	No	Yes	Yes	Yes
	CCEA	Yes	No	Yes	Yes	No
	WJEC	Yes	Yes	Yes	Yes	Yes
Turkish	OCR	Yes	No	No	No	No
Urdu	AQA	Yes	No	No	Yes	Yes
	Edexcel	Yes	No	No	Yes	Yes
Welsh (second language)	WJEC	Yes	No	Yes	Yes	Yes

Source: Ofsted

* also available in 4 skill or 3 skill (no speaking) options.

Table 8.2: Summary of A level examinations

Language	Board	AS Level	Advanced GCE	Coursework option
Arabic	Edexcel	Yes	Yes	No
Bengali	AQA	Yes	Yes	No
Chinese (Mandarin / Cantonese)	Edexcel	Yes	Yes	No
Dutch	OCR	Yes	Yes	No
French	All Boards	Yes	Yes	Yes
German	All Boards	Yes	Yes	Yes
(Modern) Greek	Edexcel	Yes	Yes	No
Gujarati	OCR	Yes	Yes	No
(Modern) Hebrew	AQA	Yes	Yes	Yes
Irish	CCEA	No	Yes	Yes
Italian	Edexcel	Yes	Yes	Yes
Japanese	Edexcel	Yes	Yes	No
Panjabi	AQA	Yes	Yes	Yes
Persian	OCR	Yes	Yes	No
Polish	AQA	Yes	Yes	No
Portuguese	OCR	Yes	Yes	No
Russian	Edexcel	Yes	Yes	Yes
Spanish	All Boards	Yes	Yes	Yes
Turkish	OCR	Yes	Yes	No
Urdu	Edexcel	Yes	Yes	No
Welsh (second language)	WJEC	Yes	Yes	Yes

Source: Ofsted

8.3. Vocational qualifications

Appendix One sets out Vocational language qualifications within the UK from entry level through to the Level 7 Diploma in Translation. Appendix 1 indicates that there are a very wide range of vocational qualifications available, particularly from entry level to level 3. In total it is estimated that there are currently:

- 12 language qualifications available at entry level
- 14 language qualifications available at level 1
- 11 language qualifications available at level 1 / 2
- 11 language qualifications available at level 2
- 25 language qualifications available at level 3
- 2 language qualifications available at level 4
- 1 language qualifications available at level 6 (the Diploma in Public Service Interpreting)
- 1 language qualifications available at level 7 (Diploma in translation)
- non-accredited provision

Vocational qualifications are offered by 11 Examination Boards. In addition to the five Examination Boards outlined in the previous section on secondary education language qualifications, a further 6 Examination Boards offer vocational qualifications. These are the:

- **Institute of Linguists Educational Trust (IoLET)** is a charitable company and runs the Chartered Institute of Linguists public examinations (i.e. those examinations which can be sat by any member of the public upon payment of the appropriate fee). The examinations of the IoL Educational Trust are offered in a wide range of languages and have been developed to meet the needs of industry, commerce and the public services. They are practical vocational qualifications and have been mapped against the relevant National Occupational Standards for approval by the regulatory body, the Qualifications & Curriculum Authority, and inclusion in the National Qualifications Framework.
- **International Curriculum and Assessment Agency Examinations (ICAAE)** is part of the International Curriculum and Assessment Agency CAA Group that offers a comprehensive educational service in the UK and overseas. ICAAE Ltd is responsible for all aspects of assessment and certification. ICAAE have recently developed a Business Chinese qualification at VRQ Entry and Level 1 to fully support Chinese. This was developed in conjunction with the faculty of The University of Hong Kong and launched in June 2006. These specifications are vocational qualifications for non-native Chinese language students; it is aimed at people who will be working or interacting with Chinese clients, colleagues or businesses. The aim of the qualification is to enhance the competitiveness of companies by promoting the social inclusion of employees through the recognition and understanding of Chinese culture and language. These qualifications focus upon commercial opportunities as a motivating factor in learning Chinese.
- **National Open College Network (NOCN)** provides accreditation services for adult learning through 11 Open College Networks (OCNs) in the 9 Regions of England, Wales (OCNW) and Northern Ireland (OCNNI). NOCN provides national qualifications and programmes in a wide range of subject areas and offers a local accreditation service, through the OCNs, that provides recognition of achievement through the award of credit. NOCN aims to widen participation and access to high quality and flexible education, training and learning, to promote social inclusion and to ensure that learner achievement is recognised, valued and understood through a national framework of accreditation.
- **Council for the Advancement of Communication with Deaf People (CACDP)** is a UK recognised awarding body and registered charity whose aim is to improve communication between deaf and hearing people. CACDP offers a portfolio of qualifications in sign language and other forms of communication with deaf and deafblind people, including qualifications in:
 - British Sign Language (BSL)
 - Irish Sign Language (ISL)
 - Deaf and Deafblind Awareness
 - Communication Tactics with Deaf and Deafblind People
 - Lipspeaking
 - Notetaking
 - Interpreting (BSL/English)

- **City & Guilds** is the only awarding body solely dedicated to vocational learning. Over 1.5 million learners work towards a City & Guilds qualification every year. City & Guilds offers learners over 500 qualifications in 28 industry areas that are developed in conjunction with key industry bodies. City & Guilds qualifications are offered through 8,500 centres in around 100 countries worldwide.
- **ABC Awards (ABC)** is one of the largest vocational awarding bodies in the United Kingdom with four offices based at Chorley, Nottingham, Reading and Taunton, all providing support to centres and a full range of assessment services. ABC Awards (ABC) suite of practical languages vocationally related qualifications are aimed at candidates across all levels and abilities. They are all accredited by QCA and therefore eligible for LSC funding.

8.4. Higher educational qualifications

Appendix Two sets out all undergraduate language courses available in the UK by nation. The appendix indicates that in:

- Scotland, there are 9 Universities offering undergraduate language provision.
- Northern Ireland, there are 2 Universities offering undergraduate language provision.
- Wales, there are 4 Universities offering undergraduate language provision.
- England, there are 60 Universities offering undergraduate language provision.

Appendix Three sets out all the available taught postgraduate courses available in the UK (excluding interpreting and translation and intercultural studies). The appendix indicates that in:

- Scotland, there are 2 Universities offering postgraduate language provision.
- Northern Ireland, there is 1 University offering postgraduate language provision.
- Wales, there is 1 University offering postgraduate language provision.
- England, there are 20 Universities offering postgraduate language provision.

Appendix Four indicates that there are 15 different Universities in the UK offering either postgraduate courses/modules and/or undergraduate courses/modules in relation to Intercultural Communication provision.

9. Language learning in Higher Education

9.1. Trends in HE language learning enrolments in the UK

The number of first-degree language undergraduates in UK higher education suffered large decreases at the end of the 1990s. These decreases are still apparent but have slowed down and started to level out in recent years.

Data from 2002/3 to 2005/6 highlights a 6.2% overall decrease in first-degree language undergraduates. This compares with a 9% increase in total HE first-degree students across all subjects.

Table 9.1 sets out numbers of first degree language enrolments at UK Universities over the period 2002/03 to 2005/06 by language subject. The Table indicates that over this period decreases in enrolments are evident in French, German, Italian, Scandinavian studies, Russian and Eastern European studies and other European languages. However, in relation to Spanish and Portuguese, numbers increased.

Table 9.1: Numbers of First degree language enrolments at UK Universities⁷⁶

	2002/3	2003/4	2004/5	2005/6	% change 2002/3 to 2005/6
Celtic studies	985	930	915	950	- 4.0%
French	8,265	7,820	7,665	7,725	- 6.6%
German	3,330	3,200	3,075	2,970	- 10.9%
Italian	1,670	1,575	1,505	1,420	- 14.9%
Spanish	4,510	4,475	4,630	4,725	+4.8%
Portuguese	295	305	310	325	+10.4%
Scandinavian studies	145	145	155	135	- 7.6%
Russian & Eastern European studies	950	920	935	920	- 2.9%
Other European languages	5980	5,055	4,780	4,885	-18.3%
Chinese	505	510	550	570	+12.0%
Japanese	490	510	585	630	+29.0%
South Asian studies	270	270	280	280	+4.5%
Other Asian studies	15	15	35	45	*
African studies	125	135	140	145	+13.4%
Modern Middle Eastern studies	675	745	780	710	+4.7%
Other non-European languages	1,180	1,160	1,135	1,135	-3.5%
Translation studies/ theory	130	145	160	145	+13.7%
Total change ⁷⁷	29,530	27,905	27,635	27,715	- 6.2%

Source: DfES

Note: These figures include UK domiciled and overseas students enrolling at UK Universities, but exclude Open University students

⁷⁶ This analysis uses the full person equivalent (FPE) count where single honours students = 1, joint honours = 0.5, major honours = 0.667, minor honours = 0.333, triple honours = 0.333

⁷⁷ UK domiciled first degree UGs decreased by 5.7%.

Table 9.2 sets out numbers of 'other' undergraduate language enrolments at UK Universities over the period 2002/03 to 2005/06 by language subject and points to an overall increase over this period of 2370, or +10.6%. The relative increase of UK domiciled enrolments is even higher at +17.7%. The analysis indicates that over the period 2002/03 to 2005/06, numbers of enrolments have increased in all languages subjects with the exception of 'other' European languages and translation studies/theory.

Table 9.2: Numbers of 'other' undergraduate language enrolments at UK Universities⁷⁸

	2002/3	2003/4	2004/5	2005/6	% change 2002/3 to 2005/6
Celtic studies	2,025	2,740	2,915	2,980	+47.3%
French	4,405	4,150	4,175	4,505	+2.2%
German	1,555	1,465	1,475	1,605	+3.1%
Italian	1,910	2,035	2,145	2,350	+23.1%
Spanish	3,325	3,500	3,700	4,645	+39.9%
Portuguese	210	245	225	360	+69.9%
Scandinavian studies	445	405	340	490	+10.1%
Russian & Eastern European studies	585	710	790	1,000	+71.5%
Other European languages	5,650	4,780	3,910	3,805	- 32.7%
Chinese	260	370	560	790	+207.1%
Japanese	685	645	765	905	+32.6%
South Asian studies	10	15	15	20	*
Other Asian studies		15	10	0	*
African studies	35	25	10	0	*
Modern Middle Eastern studies	650	670	650	765	+18.4%
Other non-European languages	80	510	20	195	+137.8%
Translation studies/ theory	480	545	720	250	- 47.9%
Total⁷⁹	22,300	22,825	22,420	24,670	+10.6%

Source: DfES

Recent postgraduate numbers of language students are rising, largely due to an increase in overseas postgraduate students. However, UK domiciled postgraduate numbers are fluctuating.

Table 9.3 sets out numbers of postgraduate language enrolments at UK Universities over the period 2002/03 to 2005/06 by language subject and points to an overall increase over this period of 500, or +8.7%.

⁷⁸ This analysis uses the full person equivalent (FPE) count where single honours students = 1, joint honours = 0.5, major honours = 0.667, minor honours = 0.333, triple honours = 0.333

⁷⁹ **UK domiciled** other UGs increased by 17.7%

Table 9.3: Numbers of Postgraduate enrolments (taught and research) at UK Universities

	2002/3	2003/4	2004/5	2005/6	% change 2002/3 to 2005/6
Celtic studies	300	325	295	285	- 4.1%
French	500	485	420	385	- 23.7%
German	345	310	315	280	- 18.9%
Italian	170	170	155	165	- 3.5%
Spanish	305	270	290	300	- 1.0%
Portuguese	25	35	25	25	*
Scandinavian studies	20	15	20	20	*
Russian & Eastern European studies	300	330	295	305	+2.7%
Other European languages	1,415	1,520	1,685	1,670	+17.9%
Chinese	150	170	185	225	+51.4%
Japanese	250	200	195	180	- 28.5%
South Asian studies	195	135	120	105	-46.2%
Other Asian studies	45	130	125	140	+210.0%
African studies	80	120	95	105	+28.0%
Modern Middle Eastern studies	515	530	545	575	+11.1%
Other non-European languages	255	250	265	210	-17.8%
Translation studies/ theory	920	1,195	1,230	1,320	+43.3%
Total ⁸⁰	5,790	6,185	6,270	6,290	+8.7%

Source: DfES

Note that total * Percentages based on less than 50 students are suppressed and represented by *

9.2. Changes in student numbers at HE level

9.2.1. First degree language students

The analysis in the preceding section is based on full person equivalent (FPE) counts. The data provided below presents headcount data to show the actual total number of first-degree language students at universities in the UK. The analysis has been produced by CILT from HESA data, and looks at the headcount of first-degree students across all years of study taking a language as a single, joint, major, minor or triple subject combination.⁸¹ Under a third of all first-degree language undergraduates are studying single honours degrees, the majority are doing a joint or combined honours degrees (70%).

⁸⁰ UK domiciled PGs decreased by 2.3%

⁸¹ Headcount data provided here is different to the Full Person Equivalent (FPE) counts used in DfES and HESA published data, the figures are not conflicting but produce different counts according to preference and purpose. Headcount data counts every language student as a full person whether they are studying single, joint, major, minor or triple honours, and so shows how many students are studying each language. In contrast, the Full Person Equivalent measure counts student activity through how many parts of students are studying languages, according to the language balance of their degree, a single honours student = 1, joint hons = 0.5, major = 0.667, minor = 0.333, and triple = 0.333.

The analysis indicates that a number of languages have experienced increases in student numbers. In particular:

- **Spanish** and **Portuguese** students have been constantly increasing over the past 8 years.
- **Chinese** and **Japanese** both suffered large decreases in students from 1998/9 to 2001/2, but have experienced large boosts in numbers in recent years, since 2002/3.
- **Modern Middle Eastern studies** student figures had also been rising since 2002/3, however this figure fell in the latest year 2005/6.

This contrasts with particular languages experiencing decreases in student numbers. In particular:

French and **German** suffered large decreases in student numbers at the end of the 1990s. These decreases are still apparent but have dramatically slowed down in recent years.

Italian student numbers have been decreasing over the past 8 years.

Tables 9.4 to 9.7 below set out this analysis in more detail.

Table 9.4: Numbers of first degree students across all years of study taking a language as a single, joint, major, minor or triple subject combination - Over 1,000 students

	% change 1998-9 to 2001-2	2002-3	2003-4	2004-5	2005-6	Change 2002-3 to 2005-6
French	-19%	14400	14130	13930	13925	-3%
Spanish	+3%	8225	8255	8535	8655	+5%
German	-17%	5875	5805	5550	5350	-9%
Italian	-5%	3005	2885	2755	2620	-13%
Russian	-15%	1535	1585	1600	1635	+7%
Celtic studies	-12%	1415	1385	1360	1400	-1%

Source: HESA⁸²

Note: In 2002/3 HESA introduced a new subject classification called the Joint Academic Coding System (JACS), hence data post 2002/3 is not comparable to previous years.

⁸² HE registrations data is collected by the Higher Education Statistics Agency (HESA) from their Student Records of individual enrolments at HE institutions. The accuracy of the data depends on how individual institutions code and report their figures to HESA.

Table 9.5: Numbers of first degree students across all years of study taking a language as a single, joint, major, minor or triple subject combination - Over 500 students

	% change 1998-9 to 2001-2	2002-3	2003-4	2004-5	2005-6	Change 2002-3 to 2005-6
Modern Middle Eastern studies	-9%	805	920	995	955	+19%
Japanese	-23%	685	715	810	860	+26%
Chinese	-16%	605	685	755	850	+40%
Portuguese	+5%	620	665	680	715	+15%

Source: HESA

Table 9.6: Numbers of first degree students across all years of study taking a language as a single, joint, major, minor or triple subject combination – Less than 500 students

	% change 1998-9 to 2001-2	2002-3	2003-4	2004-5	2005-6	Change 2002-3 to 2005-6
South & Other Asian languages	+7%	395	395	435	450	+14%
Scandinavian languages	-38%	175	175	215	150	-14%
African studies	-15%	170	180	190	190	+12%
Translation studies	*	225	305	*	325	+44%

Source: HESA

Languages with smaller student numbers may be more prone to fluctuation as small changes will have a greater effect on the percentage change.

* Missing data

Table 9.7: Numbers of first degree students across all years of study taking a language as a single, joint, major, minor or triple subject combination – Students coded under Other languages categories

	% change 1998-9 to 2001-2	2002-3	2003-4	2004-5	2005-6	Change 2002-3 to 2005-6
Other European languages	*	8985	8245	6915	7120	-21%
Other non-European languages	*	1485	1295	1240	1205	-19%

Source: HESA

Note: Relatively high numbers of students are recorded in these “Other languages” categories. A further analysis of the programmes coded in these categories found that a large proportion of the students are studying European studies. The code is also used in place of specific language codes by some institutions. Hence, unfortunately the individual totals for each language in the above tables may not adequately reflect the true numbers, i.e. be an under-representation of the true totals.

*Missing data

9.2.2. Postgraduate level

Over the past few years postgraduate numbers have been rising for some languages and for others, numbers are fairly constant or fluctuating.

Table 9.3 indicates that although there has been an overall increase over this period 2002/03 to 2005/06 of 500 (+8.7%) in numbers of postgraduate enrolments on to language courses, there are marked differences in these trends evident by language subject. In particular there has been a:

- Decline in enrolments evident in relation to French, German, Japanese and South Asian Studies
- Increases in postgraduate enrolments in relation to 'other' Asian studies, African studies, Modern Middle Eastern studies and 'Other' European languages.

9.3. Trends in student applications and acceptances to language university UG first-degrees

UCAS data released in October 2007⁸³ shows that there has been an increase in full-time undergraduate students starting single and major honours language degrees this year. In particular, in relation to:

- French, numbers increased by 14% to 700 students
- German, numbers increased by 14% to 300 students
- Spanish numbers increased by 4% to 355 students.

Increases are also evident in relation to a number of other language areas including Modern Middle Eastern studies (up 23% to 144 students), Japanese studies (up 20% to 156 students) and Chinese (up 15% to 140 students).

These increases have occurred in the context of a 5.5% overall increase in student acceptances across all subjects.

Recent trends over the years 2004, 2005 and 2006 point to fluctuating numbers of student acceptances on to first degree language courses. By comparison with respective figures for 2004, UCAS first-degree Undergraduate acceptance figures for languages for 2005 entry, saw proportionate annual increases for all languages, with the exception of Italian, Portuguese, Japanese, African and 'other' European languages. These increases, however, were not sustained. 2006 entry has seen annual proportionate decreases in student acceptances for all languages except 4 (Chinese, Modern Middle Eastern Studies, Portuguese and African Studies).

These trends in part are a reflection of broader Undergraduate acceptance trends All Under Graduate first-degree subjects rose by 8% in 2005 and then fell in the latest entry year, 2006, by 3%.

⁸³ See http://www.ucas.ac.uk/website/news/media_releases/2007/2007-10-17

Longer term analysis of trends over the past 11 years (from 1996 to 2006)⁸⁴ reveal the following patterns emerging for student acceptances in languages:

- Increases have been apparent in numbers of Spanish and Modern Middle Eastern studies students from 1996 to 2006 (overall 16% and 77% respectively). However, in the latest year, 2006 entry, Spanish suffered a decrease in numbers.
- Large decreases were seen in French and German from 1997 to 2003 (32% and 33% respectively). Since then numbers have fluctuated.
- Chinese and Japanese experienced decreases in the late 1990's followed by increases from 2001 to 2004 to reach levels above that in 1996. The increase for Japanese has not carried on but Chinese student acceptances continue to rise. There were over 3 times the number of Chinese studies students in 2006, compared to 1996.
- Decreases have been fairly constant in Italian from 1996 to 2006 (A 27% decrease). Scandinavian studies suffered a large drop in figures in 2006 from a relatively constant figure over the past few years of around 50 to just 19 student acceptances.
- Small fluctuations in numbers of acceptances have occurred in Russian & Eastern European studies, Asian studies, Portuguese and African studies.

Table 9.8 sets out these trends in more detail.

⁸⁴ HE student applications and acceptances data is managed by the Universities and Colleges Admissions Service (UCAS), from student application forms. UCAS data is different and not comparable to HESA data. UCAS data measures potential first-year full time first-degree students (applications and acceptances) only, whereas HESA data counts actual student registrations across all years of study of a wide variety of HE qualification aims.

Table 9.8: Numbers of student acceptances to language university UG first-degrees in the UK, by language subject; 1996-2006

	1996	2000	2001	2002	2003	2004	2005	2006	% change from 2005 - 2006	% change 1996-2006
R1 French	5655	4320	4077	4110	3846	3879	3964	3700	-7%	-35%
R2 German	2288	1807	1736	1653	1524	1384	1503	1401	-7%	-39%
R3 Italian	837	820	786	785	670	705	639	610	-5%	-27%
R4 Spanish	2115	2314	2331	2560	2333	2481	2547	2461	-3%	16%
R5 Portuguese	128	127	117	140	103	150	118	141	19%	10%
R6 Scandinavian studies	65	49	36	51	53	46	57	19	-67%	-71%
R7 - Russian and East European Studies	418	459	380	390	428	412	425	409	-4%	-2%
R9* Other European Languages	2200	1850	1507	1544	1621	1544	1667	1647	-1%	-25%
T1 Chinese	165	160	165	256	218	243	352	392	11%	138%
T2 Japanese	272	213	249	276	288	332	331	306	-8%	13%
T3 + T4 Asian studies	161	171	171	177	111	127	142	118	-17%	-27%
T5 African studies	54	55	57	67	78	67	57	67	18%	24%
T6 Modern Middle Eastern studies	214	219	260	278	321	349	362	378	4%	77%
T9* Other non-European languages	2514	1973	1900	1554	1521	1437	1248	1185	-5%	-53%

Source: UCAS

9.4. Students of other HE disciplines studying language accredited provision alongside their degree

Many students of other disciplines are taking language modules at universities in the UK. A host of different study routes are provided through language, certificates, diplomas, modular credits and extra-curricular learning opportunities. National research and data on the students following such courses is scarce, although the HESA student record data does capture some of these students. In some cases, they are recorded as language units alongside and accredited to the undergraduate's first degree of another discipline, in other cases, they are separately recorded as Other undergraduates (these are full qualification aims below degree level including evening language classes, business language courses, translation courses amongst others).

Data on students of other HE disciplines that are studying a language accredited alongside their degree is very difficult to accurately capture due to the varied nature of provision. In 2005/6, a total of just about 83,000 students were recorded by HESA to be studying a language at university, not at degree level, but as an accredited language course⁸⁵⁸⁶.

What can be ascertained from the HESA student records about students of other disciplines studying language modules is set out below:

- In 2005/6, HESA recorded over 57,000 students of other disciplines studying a language module accredited to their degree.⁸⁷
- The majority were undergraduates, and mainly first-degree UG students of other disciplines as well as some studying another subject at Other UG level (diplomas and certificates below degree level).
- Students were studying a wide range of other disciplines as their main degrees. Some of the popular main first-degree areas of study were Business and Management studies, English, History, Psychology, Law and Politics.
- A wide range of languages were being studied as accredited modules. French and Spanish were the most popular, each attracting around 1 in 5 of the students, followed by Italian and German each attracting around 1 in 10 of the students. Japanese was the next most popular language studied in this way.
-
- The accredited language module generally accounts for less than a quarter of the degree programme, and in many cases it is less than a tenth.
- Although the students were spread across different universities in the UK, some institutions recorded many more students of this kind than others.

⁸⁵ Of these 83,000 students, 57,000 were specifically recorded as doing a language unit accredited to another first-degree discipline and 26,000 were recorded as other undergraduate students (full qualification aims below degree level). It is suspected that the 83,000 are following similar routes but recorded differently under the institutional coding preferences.

⁸⁶ The data was collected by the Higher Education Statistics Agency (HESA) from their Student Records of individual enrolments at HE institutions. The data was analysed by CILT, the National Centre for Languages, based on student headcount analysis. It should be noted that the accuracy of the data depends on how individual institutions code and report their figures to HESA.

⁸⁷ These are students where language is NOT one of their 3 main qualification aims but they are recorded as studying a language module, over the course of the year 2005/6.

- It is very difficult to capture all language learners due to the range of courses on offer, as well as different coding systems used by different institutions.

In 2005/6 about 26,000 undergraduates were recorded by the Higher Education Statistics Agency (HESA) to be studying a language at university, not at first-degree level, but as an “Other undergraduate”. A summary of the nature of the qualifications studied at ‘other’ undergraduate level is set out below⁸⁸:

- Other undergraduate includes qualification aims below degree level. Over half (58%) of the language students at this level were studying for an **institutional undergraduate credit** which may be counted towards another qualification and includes CAT Schemes. Nearly 3 out of 10 (29%) were coded as doing **other undergraduate diplomas and certificates** and a further 1 out of 10 (9%) were coded as **certificates of Higher Education**.
- A wide range of languages were studied by Other undergraduate level students, with French and Spanish being the most popular (20% and 18% respectively), followed by Italian (9%) and then German (6%).
- The majority (92%) were doing the language as a single subject at Other undergraduate level.
- Almost all (99%) of the other undergraduates were part time students. The majority of language courses taken by other undergraduates were less than 0.25 of a full time equivalent course.
- Nine universities accounted for almost three quarters of all the other undergraduate language students in the UK. Most of these recorded more than 1,000 other undergraduates studying languages.
- Examples of programme titles given in the HESA returns can give us an indication of the broad nature of these qualifications. Note that this field is unchecked by HESA and does not reflect the true programme title but reflects the institution’s administrative recording only:⁸⁹
 - *Access Spanish 1: Beginners to Intermediate*
 - *Arabic – absolute beginners – autumn term*
 - *Cert in lang for professional purposes - Italian*
 - *Brush up your french*
 - *German for Business – NLS level 1*
 - *PT IOL diploma in translation (English – Italian)*
 - *Cert of Continuing Education*
 - *Translation Japanese*
 - *University Language Course*
- Over the past year student numbers recorded to HESA on other undergraduate courses have risen from 22,700 in 2004/5 to 26,000 in 2005/6

⁸⁸ This data covers UK and overseas students studying at all HE Institutions in the UK. It is for accredited study only and does not include extra curricular, non-credit bearing courses (see question 5 for more details of these courses).

⁸⁹ It is not entirely clear whether there may be double counting of some students in the data received from due to termly registrations on some courses. This needs to be double checked with HESA.

- The profiles of other undergraduate language courses are wide and varied. It is very difficult to capture all language learners due to the range of courses on offer, as well as different coding systems used by different institutions.

9.5. HE students taking language as an extra curricular activity

Data on HE students taking a language as an extra curricular activity is extremely difficult to capture and is not recorded in the HESA student administrative data records⁹⁰.

Recent survey research carried out by the Association of University Language Centres⁹¹ identified a total of around 33,000 HE students on unaccredited language courses outside of their main studies (results based on 73 institutions surveyed in the UK, in 2006/7).

9.6. Unemployment rates for language graduates

The unemployment levels of 2005/6 UK, full-time, first-degree language graduates 6 months after graduation was 5.6% across all languages, compared to 6.4% for graduates across all subjects.

French graduates enjoyed a low unemployment rate at 4.6%, Spanish had a 5.4% rate, and for German and Italian graduates the unemployment rate was 5.9%.

Table 9.9 sets out destinations of all UK domiciled leavers who obtained first degrees through full-time study, by subject of study 2005/6. The data is based on HESA Destinations of Leavers from Higher Education, (2005/6)⁹²

⁹⁰ Non-credit bearing course data used to be collected by HESA, but collection was complex and not all institutions filled in their returns undermining the reliability of the data. This is no longer collected and reported by HESA in the same way.

⁹¹ The research was carried out by the Association of University Language Centres (AULC) looking into numbers and motivations of students taking a language as an extra-curricular activity, outside their studies (see entry listed under research below for further details).

⁹² The Destinations survey is carried out by the Higher Education Statistics Agency (HESA) to ascertain the employment circumstances of graduates 6 months after they have graduated and, if they are working, in which occupations and industries. A postal questionnaire is sent out to all graduates in January of the year following graduation. The response rate for UK, full-time, first-degree 2005-6 graduates was 78.5%.

Table 9.9: Destinations of all UK domiciled leavers who obtained first degrees through full-time study, by subject of study 2005/6

JACS code		% unemployed	Total
	Total - All subject areas	6.4%	181485
A	Medicine & dentistry	0.2%	5680
D	Veterinary science	1.9%	515
X	Education	3.4%	8145
K	Architecture, building & planning	3.7%	3275
M	Law	3.8%	8555
B	Subjects allied to medicine	4.7%	14480
RT*	Foreign Languages	5.6%	4075
G	Mathematical sciences	5.6%	3495
QRT**	Linguistics, Classics, Languages and Literature	6.2%	13645
C	Biological sciences	6.4%	18745
L	Social studies	6.4%	17545
N	Business & administrative studies	6.4%	20595
D	Agriculture & related subjects	6.5%	1460
V	Historical & philosophical studies	6.7%	10220
F	Physical sciences	7.0%	9130
H J	Engineering & technology	8.0%	9180
P	Mass communications & documentation	8.0%	5805
W	Creative arts & design	8.7%	20035
Y	Combined	9.8%	815
G	Computer science	10.8%	10160
	Total - All subject areas	6.4%	181485

Source: Adapted from HESA table. Table 3avi, in CD Reference Volume Destinations of Leavers from Higher Education, 2005/6. HESA published data is based on the Full Person Equivalent measure whereby a single honours student = 1, joint = 0.5, major = 0.667, minor = 0.333, triple = 0.333

* The languages and JACS subject codes extracted for this are R1 French, R2 German, R3 Italian, R4 Spanish, R5 Portuguese, R6 Scandinavian languages, R7 Russian and East European languages, R9 Other European languages, T1 Chinese, T2 Japanese, T3 South Asian languages, T4 Other Asian languages, T5 African languages, T6 Modern Middle Eastern languages, T9 Other non-European languages.

** Includes HESA codes QRT and so includes the above MFL subjects, with other disciplines such as Linguistics, Classics, American studies etc.

9.7. Review of HE provision

The National Languages Strategy in England, Languages for All: Languages for Life (DfES, December 2002) has important implications regarding the role of Higher Education Institutions.

A report undertaken in 2005⁹³ specifically examined the role of Higher Education in the National Languages Strategy and set out a number of policy implications as follows:

Communicating the National Languages Strategy

The National Languages Strategy should be communicated more clearly to HE, with targeted information for senior managers on the importance Government attaches to the role of Higher Education in the National Languages Strategy, and the steps, which it is intending to take in this area.

To safeguard languages provision at national/regional level, certain Modern Foreign Languages should be designated subjects of strategic national importance.

The Funding Council should explore the possibility of instituting a notice period of 12 months before the closure of any language departments offering undergraduate teaching.

In conjunction with the Regional Development Agencies the Funding Council should take a more active role in examining the implications that falling languages provision may have for student access at the regional level, and should consider providing additional funding to university departments if there is a powerful case that falling provision in a particular region would hinder access to languages which are important for national/regional development.

A regular update on national/regional capacity should be undertaken, with an annual monitoring of numbers at undergraduate and postgraduate level, by language, region, type of institution and course, with information on gender, disability, ethnicity and social class.

Developing International Strategy

Within the framework of the DfES International Strategy (November 2004) universities should be encouraged to see the benefits to their UK students of a fully developed international policy which might include; strategies for the provision of study/work placements and for an extension of Erasmus take up; steps to encourage the international dimension for staff at all levels; strategies for internationalising the curriculum; institutional language policy; and strategies for promoting an inclusive international community within the university.

A formal dialogue with professional bodies should be instituted in order to extend understanding of international competence in the professions, and there should be broad discussion among HE institutions of the implications of 'international' in degree titles.

⁹³ The National Languages Strategy in Higher Education, University Council of Modern Languages, February 2005

Widening participation in language study

Funded languages outreach projects for each region should bring together consortia of universities to develop outreach activities for regional secondary schools and colleges, including: provision of language learning materials; ambassador/buddy schemes; motivational road shows; taster courses; open days.

The range of languages outreach activities across universities in England should be surveyed and good practice in this area disseminated.

Stimulating demand

As part of its communications strategy, the DfES should develop its suite of 'Languages Work' material to include information for students which focuses on the international/global context for professions, and lists HE courses which prepare for them.

As new variable tuition fees structure is put in place, universities should be encouraged to develop Languages Strategy bursaries and scholarships, specifically targeted on able linguists from less advantaged backgrounds.

There is a need for more information on the motivations of non-specialist language learners. This information could be used to better inform the development of promotional material for future National Languages Strategies.

9.8. Conclusions

Data from 2002/3 to 2005/6 highlights a 6.2% overall decrease in first-degree language undergraduates. This compares with a 9% increase in total HE first-degree students across all subjects.

Over this period decreases in enrolments are evident in French, German, Italian, Scandinavian studies, Russian and Eastern European studies and other European languages. However, in relation to Spanish and Portuguese, numbers increased.

By contrast 'other' undergraduate language enrolments at UK Universities increased over the period 2002/03 to 2005/06 by 2,370, or +10.6%.

Recent postgraduate numbers of language students are rising, largely due to an increase in overseas postgraduate students. However, UK domiciled postgraduate numbers are fluctuating. There are marked differences in these trends evident by language subject with declines in enrolments evident in relation to French, German, Japanese and South Asian Studies and increases in postgraduate enrolments in relation to 'other' Asian studies, African studies, Modern Middle Eastern studies and 'Other' European languages.

Many students of other disciplines are taking language modules at universities in the UK. A host of different study routes are provided through language, certificates, diplomas, modular credits and extra-curricular learning opportunities. Data on students of other HE disciplines that are studying a language accredited alongside their degree is very difficult to accurately capture due to the varied nature of provision, but in 2005/6, a total of just about 83,000 students were recorded by HESA to be studying a language at university, not at degree level, but as an accredited language course⁹⁴⁹⁵.

Recent survey research carried out by the Association of University Language Centres⁹⁶ identified a total of around 33,000 HE students on unaccredited language courses outside of their main studies (results based on 73 institutions surveyed in the UK, in 2006/7).

The unemployment levels of 2005/6 UK, full-time, first-degree language graduates 6 months after graduation was 5.6% across all languages, compared to 6.4% for graduates across all subjects.

French graduates enjoyed a low unemployment rate at 4.6%, Spanish had a 5.4% rate, and for German and Italian graduates the unemployment rate was 5.9%.

⁹⁴ Of these 83,000 students, 57,000 were specifically recorded as doing a language unit accredited to another first-degree discipline and 26,000 were recorded as other undergraduate students (full qualification aims below degree level). It is suspected that the 83,000 are following similar routes but recorded differently under the institutional coding preferences.

⁹⁵ The data was collected by the Higher Education Statistics Agency (HESA) from their Student Records of individual enrolments at HE institutions. The data was analysed by CILT, the National Centre for Languages, based on student headcount analysis. It should be noted that the accuracy of the data depends on how individual institutions code and report their figures to HESA.

⁹⁶ The research was carried out by the Association of University Language Centres (AULC) looking into numbers and motivations of students taking a language as an extra-curricular activity, outside their studies (see entry listed under research below for further details).

10. Language learning in Further Education

10.1. Introduction

This chapter draws on the findings of the 2006 Survey of vocational related language learning in Further Education (FE) undertaken by CILT as part of their Language Skills Alliance work, to provide an overview of current vocational language course provision, reasons for the current situation and implications for the future. The survey was undertaken with the aim of informing planning for languages in FE in relation to the specialised Diplomas in England (which are due to be taught for the first time in 2008), and related developments in other parts of the UK. The survey's questionnaire was sent out to 296 FE colleges, representing almost all general FE colleges in the UK and the findings are based on the responses received from 139 colleges, a response rate of 46%.

The Vocational Language Resource Bank

The Vocational Language Resource Bank (VLRB) is owned and operated by CILT and offers free resources and ideas for teachers to use in their classes in courses with a vocational slant. The resources have been designed by teachers working in schools and Colleges of Further and Adult Education and CILT see the Resource Bank as a useful central point for teachers to gather and share material. Currently there are 85 sets of resources, and it is envisaged that this number will grow as more teachers add to it. There is an easy to use drop down menu to select resources for a specific language, level, skill or vocational sector. The main characteristics of the VLRB are:

- The majority of the resources are for levels entry to Level 2, although a number are for Level 3
- It is intended that teachers use them as a starting point from which to develop their own materials to eventually create the full set of resources
- The number of languages featured is intended to increase over time, but languages currently included are French, German, Spanish, Italian, Urdu, Japanese and Arabic
- The resources are text-based, visual and with sound, with examples to cover the four skills of listening, speaking, reading and writing (though not in every language at every level)
- It is possible to copy and adapt resources for one vocational area for use in another
- There is a section on tips for making other resources, including ideas for teachers planning to run vocational courses, and links to other web-based resources
- Other sections provide information on the Language Ladder and National Language Standards

The Vocational Language Resource Bank can be found at www.vocational-languages.org.uk

10.2. Current vocational language provision in FE colleges

From the 139 responses, the key findings are:

- Fewer than half (44%) of the FE colleges offer opportunities to learn languages alongside vocational courses
- More than a quarter (27%) of those offering vocationally related languages courses has reduced this provision
- Of the colleges that do not currently offer vocational language provision, just over a third (36%) did so in the past
- 1 in 5 (21%) of colleges have never offered vocational language courses

The reduced language provision contrasts with evidence of an increasing need for language skills within many sectors in the workplace, especially in the context of aiming to focus vocational learning on supplying the skills required by employers. Employers can, and do, employ foreign nationals where it is easier for them to access language skills in this way. This implies that reducing vocational language provision at a time when demand for language skills from employers is not declining will lead to UK nationals who are restricted in their ability to access international opportunities and have the competitive disadvantage in relation to their European counterparts for jobs both in and out of the UK.

10.3. Characteristics of current provision

Of the 60 FE colleges that do currently offer vocational language provision, results indicate that:

- Spanish is overwhelmingly the most popular language offered (offered by 92% of the colleges which offer vocational language study), followed by French (45%), Italian (22%) and German (20%). There is very little provision at all for any other languages
- By far the most popular vocational subject to offer language study is Travel and Tourism (offered by 90% of colleges offering vocational languages), followed by Business (22%). Language study is also offered in courses such as Hospitality and catering, Fashion, IT/ICT, Art and Design and Early Years studies, but by far fewer colleges
- Nearly half (49%) of colleges offer accreditation for languages within vocational subjects in NVQ language units, while less frequently offered accreditation is OCN credits, the ABC practical language certificate and some CBLC awards
- The most popular level of study for languages was Level 1, offered by 76% of colleges. Entry level was offered by 43%, Level 2 by 38%, while higher levels of study were rarely offered
- Core college funds are used to fund language study in the majority (84%) of colleges

The predominance of Spanish may be linked to the fact that there are far more air journeys between the UK and Spain, than any other country, and language units on vocational courses are most frequently linked to Travel and Tourism courses. It could also be influenced by the fact that many students will have learned French at school and look to start a new language with their vocational course. Another factor leading to the provision of (almost exclusively) European languages is the availability of tutors. However, there is evidence that other languages such as Chinese, Russian and Arabic are increasingly needed in the workplace. Indeed, the Sector Skills Council for Hospitality, Leisure, Travel and Tourism, People 1st, has highlighted the risk of losing international business if it's identified requirement for Chinese and Russian in its sector is not met.

Even in vocational sectors which have an obvious link with languages, such as a Travel and Tourism course, opportunities for language study in FE are rare, while other vocational areas seemingly place even less importance on language skills. This implies a need to raise awareness of the value of languages in all vocational areas so that students training to be transport workers, mechanics and beauty therapists for example as well as hotel managers, can have the opportunity to develop language skills useful in their professions. CILT views giving a higher profile to the international context of a student's chosen career pathway as key in helping to raise aspirations of learners, as well as linking more closely to skills they are likely to find useful in the future.

The predominance of Level 1 qualifications offered (equivalent to Foundation level GCSE in England), may indicate that students are starting a completely new language, or it may reflect the shortage of curriculum time available to study a language within a vocational programme. Since only just over a third of colleges offer languages at Level 2 (equivalent to Higher level GCSE), and fewer than one in ten offer progression to Level 3 ('A' Level equivalent), the provision is unlikely to meet employer expectations for a higher level of language competence necessary in many occupational roles in a range of sectors. Also, the scarcity of opportunities in FE to progress in a language studied at school is limiting both to the individual, and the UK skills pool – despite the addition of a new language (horizontal progression) bringing its own benefits and being particularly relevant for some workplace opportunities, the lack of opportunity for progression in one language may have a negative effect on student motivation.

10.4. Number of language learners on vocational courses

The survey identified that there were:

- Fewer than 2,000 (approximately 1,860) language learners on vocational study courses in 2005-6. It is estimated that this represents less than 1% of all students on vocational courses
- The average number of students per college on vocational courses was 23
- Nearly half (42%) felt that student numbers would fall in the following academic year, while just under a third (32%) thought they would increase
- The introduction of new language programmes or initiatives, and increased interest or uptake in the vocational area or in languages were reasons put forward for anticipating increased learner numbers

- The main reason for declining numbers was funding, although some colleges suggested low student interest in languages and a few reported staffing issues

Reasons for the declining numbers of language learners and for cutting vocational courses are examined in the following section, followed by some positive indicators associated with the colleges which expect learner numbers to increase.

10.5. Reasons for the decline in FE language learner numbers and provision

10.5.1. Funding

Until recently, many colleges in England have been able to offer language provision leading to stand-alone qualifications supported by 'additionality' funding, however this source of funding is no longer available which is to have a big impact on learner numbers, with 13 out of 29 colleges citing funding as the reason for expecting declining numbers. Local LSC funding is prioritised towards whole qualifications and it is only when a language programme is embedded in the core vocational course that it may attract LSC funding support. Since the language component offered in relation to a vocational course is very often an optional additional element, it is in a vulnerable position with regards to funding. Local Learning Partnerships, individual college senior managers and vocational curriculum managers set priorities as local LSC budgets come under pressure, and there is a trend across the UK for languages to be eclipsed by other priorities for vocational students.

Further research in 2006 by the LSDA in 'The impact of new fee policies in FE' which was commissioned by the LSC, found that while colleges overall reported no reductions in FE enrolments due to fee effects in that year, there are some sectoral effects. Colleges identified a number of areas where provision might be at risk because of fee changes and foreign language programmes were areas for which concerns were expressed.

10.5.2. Other reasons

Aside from funding issues, based on the 60 FE colleges that have discontinued some or all vocational language course provision, the main reason for discontinuing this provision was low student interest in languages (reported by 33%). A quarter also mentioned lack of support for languages across the college, restrictions of vocational courses (including reduced teaching hours and timetabling issues), and funding issues. Less commonly cited reasons included achievement issues (languages deemed too demanding at the level of learning), and staffing problems. These findings were also highlighted by the LSDA (2005) research 'Modern Foreign Languages in a vocational context: An effective way to deliver the National Languages Strategy?' and separately by a doctoral research investigation into FE language provision in Scotland.

In addition to the complex issue of student motivation, other reasons may in part explain the apparent decline in vocational language learning. The view that 'English is enough' is still held by some sectors of the general public, and the relevance of the course content and the form of assessment are questioned by some. The quality of the learning experience, which links to the scarcity of specialist professional development opportunities for language tutors in FE, may also be a factor in some

circumstances. This should be addressed in the future by the recently formed Subject Learning Coaching network in England which supports the dissemination of Quality Improvement Agency resources designed to improve the quality of the teaching and learning of languages in the post-16 phase.

Colleges report staff reductions, particularly full-time permanent members, including specialist language managers. This reduction results in the loss of the skills and expertise needed to teach languages linked to vocational courses, as well as a decrease in the force behind any championing of the cause of languages.

10.6. Positive indicators

While 42% of colleges in the survey expected a decrease in learner numbers in 2006-7, 32% (19 colleges) did expect an increase, often as a result of new programmes or initiatives. Some of the reasons given for the expected upturn were students' increased motivation to take a language within Travel and Tourism courses, preparation for language learning within the new specialised Diplomas in England and, in Wales, the inclusion of compulsory language studies in the Welsh Baccalaureate. There are some good examples of colleges using overseas trips as the motivation to introduce language preparation, and there is some good practice in developing relevant language teaching materials for use in the classroom (which can be found on the VLRB).

Some colleges have been able to ease funding issues by using enrichment funding instead of core funding to maintain some of their vocationally related language provision. Linked to this is evidence of some good examples of colleges introducing cross-college timetabling or a common slot once a week which brings together students from a number of disciplines to learn a language. Vocational departments in some cases have taken the lead and made time for a language element within their core hours. Other innovations include offering languages within less conventional subjects such as sport and fashion.

There are some successful results reported from colleges who can get over the motivational challenges of teaching some students on vocationally related language courses, by winning students over with good teaching and the argument as to how learning a language will benefit them, whether working in the UK or abroad.

10.7. Conclusions

There are many positive opportunities to develop languages in line with the needs of employers and in combination with sector-specific skills with the changing nature of post-14 Education. However the survey demonstrates a serious erosion of the languages infrastructure in the FE sector. The successful reinstatement of provision in line with new developments requires language learning to be strongly promoted, properly funded and given a high priority within the 14-19 specialist Diplomas. Further investigation into poor student motivation may be necessary as will be a major programme of staff development, for languages to be able to flourish within the FE sector.

11. Language learning in secondary education

11.1. GCSEs

11.1.1. England

46% of all school pupils in England were taking at least one language at GCSE in summer 2007, a total of 301,400 pupils. This includes both maintained and independent schools.

The proportion of all pupils taking languages at GCSE has been decreasing dramatically in recent years. 78% of all pupils were taking a language in 2001, 68% in 2004, 59% in 2005, 51% in 2006 and then the recent drop to 46% in 2007.

By language the trends have been as follows:

- French: 53% of all pupils took French at GCSE in 2001, which dropped to 29% in 2007 (189,400 pupils).
- German: 22% of all pupils took German at GCSE in 2001, which dropped to 12% in 2007 (75,700 pupils).
- Spanish: Spanish has remained fairly constant with 8% of all pupils taking Spanish in 2001 and in 2007 (53,700 pupils).

Table 11.1 presents more detailed information on GCSE attempts and achievements for 15 year old pupils in all English schools in language subjects over the period 2002 to 2006. The analysis underlines significant falls in numbers of entries and numbers achieving A*-C in relation to French and German.

Significant decreases in the number of entries and those achieving A*-C were also evident in relation to Italian, Chinese, Punjabi, Turkish and Urdu, while increases were evident in relation to Polish, Dutch, Portuguese, Spanish and Persian. A large increase in both the number of entries and those achieving A*-C was also evident in relation to 'other' languages.

Appendix Five (Tables A5 1 – 9) outline the proportion of all pupils taking at least one language GCSE in 2002-3 to 2005-6 for each region by Local Authority. The analysis indicates that over this period there has been a fall in the proportion of such pupils in every region.

Appendix Six (Tables A6 1 – 10) outline the proportion of all pupil attempts at GCSE in languages at the end of Key Stage 4 in maintained schools in 2005-6, by Local Authority, for each region. The Tables outline these findings in relation to the proportion of Key Stage 4 pupils attempting a foreign language, French, German, Spanish or Italian and other modern languages. In relation to in relation to the proportion of Key Stage 4 pupils attempting a foreign language this figure ranges from 39% in the North East to 76% in Yorkshire and the Humber. The average for England is 48%.

Table 11.1: GCSE attempts and achievements for 15 year old pupils in all schools in languages subjects; England 2002 and 2006

Language	Entries 2002	A*-C 2002	Entries 2006	A*-C 2006	Entries - Change 2002- 2006	A*-C - Change 2002 - 2006
Dutch	277	224	315	287	38	63
French	316030	163376	208,407	133,161	-107,623	-30,215
German	125868	71516	84,372	57,916	-41,496	-13,600
Italian	3780	2783	3,056	2,442	-724	-341
Modern Greek	427	375	432	386	5	11
Portuguese	604	471	728	615	124	144
Spanish	50049	28534	51,586	34,553	1,537	6,019
Arabic	1589	1212	1,597	1,233	8	21
Bengali	2160	1455	1,590	1,066	-570	-389
Chinese	2289	2170	1,827	1,724	-462	-446
Gujarati	1175	973	1,025	928	-150	-45
Japanese	696	642	839	697	143	55
Modern Hebrew	347	304	412	376	65	72
Punjabi	1218	877	928	706	-290	-171
Polish	159	127	325	299	166	172
Russian	1525	1348	1,396	1,260	-129	-88
Turkish	1206	1008	996	906	-210	-102
Urdu	6807	4264	5,322	3,595	-1,485	-669
Persian	283	221	338	290	55	69
Other languages	8	0	15178	13395	15,170	13,395

Source: DfES

Notes: Age at start of academic year i.e. 31st August 2005; Data includes attempts and achievements by these pupils in previous academic years.

11.1.2. Wales

The proportion of 15 year olds entering at least one language GCSE in Wales has fallen from 46 per cent in 1996 to 30 percent in 2006. More detailed analysis indicates that:

- The proportion of 15 year olds entering at least one GCSE in a modern foreign language has fallen each year, from 46 per cent in 1996 to 30 per cent in 2006;
- The total number of GCSE entries in modern foreign languages has decreased each year since 1996, from 19,000 in 1996 to 12,500 in 2006;
- In 2006, the proportion of 15 year olds achieving A*-C in at least one modern foreign language was 22 per cent;

Table 11.2 identifies the change in number of foreign language GCSE examination entries in Wales by 15 year olds, by language subject, over the period 2003/04 to 2005/06. The analysis indicates that over this period the total number of foreign language entries fell by –1,020 or –7%. In relation to specific language entries:

- Decreased by –880 (-9%) in relation to French, and –249 (-9%) in relation to German
- Increased by 76 (+6%) in relation to Spanish, 21 (44%) in relation to Chinese or Japanese and by 21 (+30%) in relation to a range of other languages including Dutch, Modern Greek, Portuguese, Arabic, Polish, Russian, Persian, Modern Hebrew and Turkish.

Table 11.2: Change in number of foreign language GCSE examination entries in Wales by 15 year olds, by subject

Language	Number of entries 2003/04	Number of entries 2005/06	Change in number of entries 2002/03 to 2005/06	% change in number of entries 2003/04 to 2005/06
French	9,493	8,613	-880	-9%
German	2,672	2,423	-249	-9%
Spanish	1,192	1,268	76	6%
Italian	100	91	-9	-9%
Chinese, Japanese	48	69	21	44%
Urdu, Bengali, Punjabi, Gujurati	67	67	0	0%
Other (1)	69	90	21	30%
Total	13,641	12,621	-1,020	-7%

Source: Statistical Bulletin, 30th August 2007; Statistical Directorate, Welsh Assembly Government (DCSF)

(1) Other includes Dutch, Modern Greek, Portuguese, Arabic, Polish, Russian, Persian, Modern Hebrew and Turkish.

11.1.3. Scotland

The Scottish Secondary education system is completely different to that in England Wales and Northern Ireland (Table 11.3 shows the Scottish Credit and Qualifications Framework). As a result of the 'Higher Still'⁹⁷ reforms, every 'Higher' course now consists of:

- A compulsory core which all candidates must complete.
- Optional elements which a candidate and/or centre choose to study.
- Three progress exams, commonly referred to as a NAB (a 'National Assessment Bank', from which these exams are selected by teachers). These are assessed by a centre and moderated by the Scottish Qualifications Authority (SQA).
- Coursework which candidates complete in parallel to other studies, though not all subjects include this.
- A terminal exam which candidates sit once they have achieved sufficiently well in the progress exams - it is the final examination which determines the grade and level of pass and, where applicable, any coursework.

Table 11.3: Scottish Credit and Qualifications Framework Levels

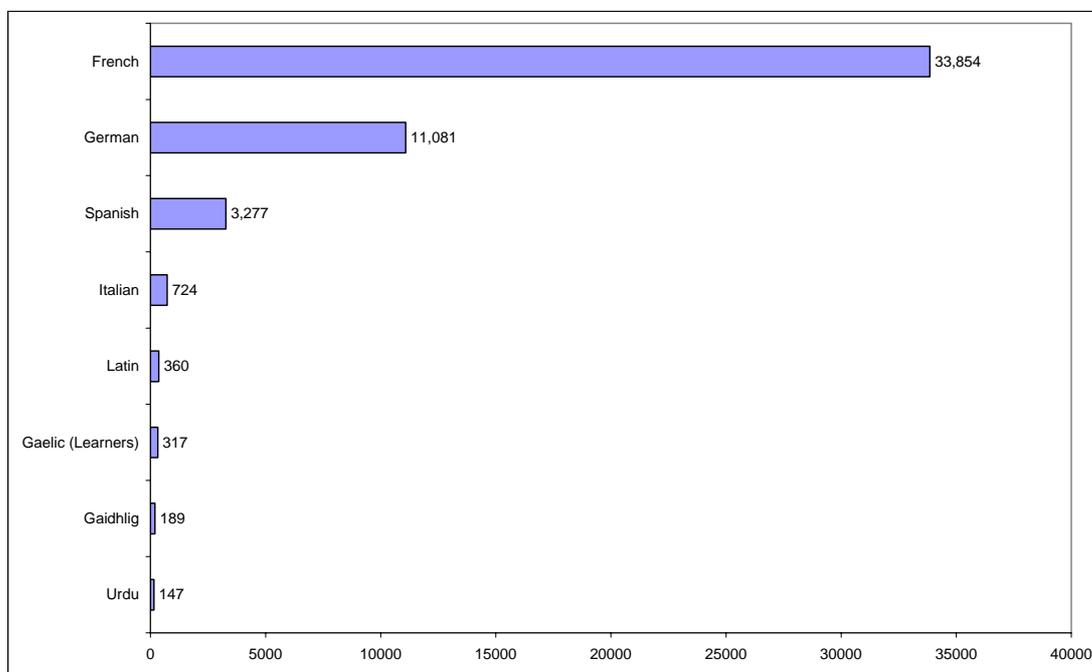
SCQF level	SQA National Units, Courses and Group Awards	Higher Education	Scottish Vocational Qualifications
12		Doctorates	
11		Masters	SVQ 5
10		Honours Degree Graduate Diploma/Certificate*	
9		Ordinary Degree Graduate Diploma/Certificate*	
8		Higher National Diploma Diploma in Higher Education	SVQ 4
7	Advanced Higher	Higher National Certificate Certificate in Higher Education	
6	Higher		SVQ 3
5	Intermediate 2 Credit Standard Grade		SVQ 2
4	Intermediate 1 General Standard Grade		SVQ 1
3	Access 3 Foundation Standard Grade		
2	Access 2		
1	Access 1		

Source: SCQF 2006

⁹⁷ <http://www.scotland.gov.uk/library/documents-w2/hsl-00.htm>

Chart 11.1 highlights the total number of qualifications at SCQF levels 3 to 5, by language subject in 2004/05. The Chart indicates that of a total of about 50,000 language qualifications obtained at SCQF levels 3 to 5, 68% were in French, 22% in German and 7% in Spanish.

Chart 11.1: Total qualifications attained by leavers at SCQF levels 3 to 5, by language subject: 2004/05



Source: Scottish Qualifications Authority

Table 11.4 identifies the numbers of students sitting standard grade foreign languages in Scotland over the period 1999-2007. The Table indicates that over this period, there has been an overall decrease of just over 12,000 such students or – 62%. In terms of absolute numbers this decrease has largely been accounted for by a decrease in numbers sitting French and German at this level, but decreases are also evident in relation to Italian and Latin.

Increases occurred in numbers sitting Gaidhlig, Spanish, Classical Greek and Urdu, but numbers involved were not large.

Tables 11.5 and 11.6 outline Intermediate 1 and 2 entries for foreign languages in Scotland by language subject, over the period 2000 to 2007.

Table 11.5 indicates that in relation to Intermediate 1 entries for all foreign languages a significant increase from 280 to 2,421 occurred over the whole period 2000 to 2007, with French followed by Spanish and German accounting for almost all this increase.

Table 11.6 indicates that in relation to Intermediate 2 entries for all foreign languages a significant increase from 1,095 to 4,279 occurred over the whole period 2000 to 2007, again with French followed by Spanish and German accounting for almost all this increase.

However, the increases in Intermediate 1 and 2 level entries only partially offset the substantial decreases in those qualifying at SCQF levels 3 to 5.

Table 11.4: Students sitting standard grade foreign languages in Scotland; 1999-2007

Language/Year	1999	2000	2001	2002	2003	2004	2005	2006	2007	Change 1999-2007	% change 1999-2007
French	37,697	38,362	38,736	39,190	37,988	36,306	34,275	33,840	32,315	-5,382	-14%
Italian	675	852	797	688	569	615	401	453	420	-255	-38%
Urdu	101	153	174	171	181	164	153	130	149	48	48%
Gaelic	413	366	385	328	334	316	314	364	383	-30	-7%
Gaidhlig	95	117	133	138	183	218	190	193	173	78	82%
Russian	13	7	10	17	7	1	6	4	1	-12	-92%
Latin	980	824	831	700	640	570	638	548	460	-520	-53%
German	16,387	15,845	15,748	13,995	13,413	12,065	11,276	11,066	9,784	-6,603	-40%
Spanish	2,435	2,911	2,846	3,032	2,779	2,807	2,824	3,032	2,923	488	20%
Classical Greek	6	13	9	4	5	4	4	7	8	2	33%
Total	58,802	59,450	59,669	58,263	56,099	53,066	50,081	49,637	46,616	-12,186	-62%

Source: Scottish Qualifications Authority

Annual Statistical Reports 1999/2000/2001/2002/2003/2004/2005/2006/2007

Table SG2: Entries by candidate type for each subject at Standard Grade

www.sqa.org.uk

Table 11.5: Intermediate 1 entries for foreign languages in Scotland; 2000-2007

Language/Year	2000	2001	2002	2003	2004	2005	2006	2007	Change 2000- 2007	% change 2000- 2007
French	23	61	158	574	989	1,136	1,470	1,578	1,555	6761%
Gaelic (Learners)	5	13	20	25	11	15	13	24	19	380%
Gaidhlig	-	-	7	-	-	1	-	-	-	-
German	23	47	59	149	197	151	246	271	248	1078%
Italian	43	178	199	195	131	185	188	111	68	158%
Spanish	181	398	536	598	663	672	851	708	527	291%
Latin	4	4	16	4	1	7	1	6	2	50%
Russian	-	-	3	1	9	17	14	3	3	
Classical Greek	1	-	-	-	-	-	-	-	-1	-100%
Total	280	701	998	1546	2001	2184	2783	2701	2,421	865%

Source: Scottish Qualifications Authority

Annual Statistical Reports 2000/2001/2002/2003/2004/2005/2006/2007

Table IA1: Trend in entries for each subject at Intermediate 1

www.sqa.org.uk

Table 11.6: Intermediate 2 entries for foreign languages in Scotland; 2000-2007

Language/Year	2000	2001	2002	2003	2004	2005	2006	2007	Change 2000-2007	% change 2000-2007
French	588	944	1,086	1,591	2,144	2,245	2,672	3,275	2,687	457%
Gaelic	15	15	34	36	46	68	49	30	15	100%
Gaidhlig	-	7	8	13	11	15	19	11	4	-
German	200	479	474	576	628	624	644	802	602	301%
Spanish	220	342	483	554	737	732	852	985	765	348%
Italian	51	133	114	120	157	189	167	144	93	182%
Russian	-	1	-	2	3	1	3	2	2	-
Latin	14	23	46	31	93	63	114	109	95	679%
Classical Greek	-	10	-	17	9	9	7	16	16	-
Total	1095	1954	2245	2940	3828	3946	4527	5374	4,279	391%

Source: Scottish Qualifications Authority

Annual Statistical Reports 2000/2001/2002/2003/2004/2005/2006/2007

Table IB1: Trend in entries for each subject at Intermediate 2

www.sqa.org.uk

11.1.4. Northern Ireland

Table 11.7 identifies the number of Foreign Language GCSE results in Northern Ireland by grade in 2006.

The analysis indicates that there were 17,986 foreign language GCSE's sat in 2006 accounting for 9.4% of all GCSE's sat in Northern Ireland.

10,857, or 60% of all foreign language GCSE's sat were accounted for by French and 3,038 or 17% by Spanish.

Table 11.7: Foreign Language GCSE Results in Northern Ireland by grade and language subject - 2006

Language	Number sat in 2007	% of total number sat	Cumulative percentage A*	Cumulative percentage A	Cumulative percentage B	Cumulative percentage C	Cumulative percentage D	Cumulative percentage E	Cumulative percentage F	Cumulative percentage G	Cumulative percentage U
Spanish	3038	1.6	15.4	37.3	57.3	77.5	90.6	96.0	98.7	99.5	100.0
French	10857	5.6	11.0	25.5	45.0	68.7	85.5	93.4	97.6	99.5	100.0
German	1285	0.7	13.5	37.9	60.4	81.6	93.7	98.1	99.2	99.8	100.0
Irish	2557	1.3	15.5	40.6	64.1	82.9	93.2	97.0	99.1	99.8	100.0
Other Modern Languages	249	0.1	31.7	53.0	69.9	77.5	88.0	94.8	99.6	99.6	100.0

Source: Joint Council for Qualifications

11.2. AS and A2

11.2.1. England

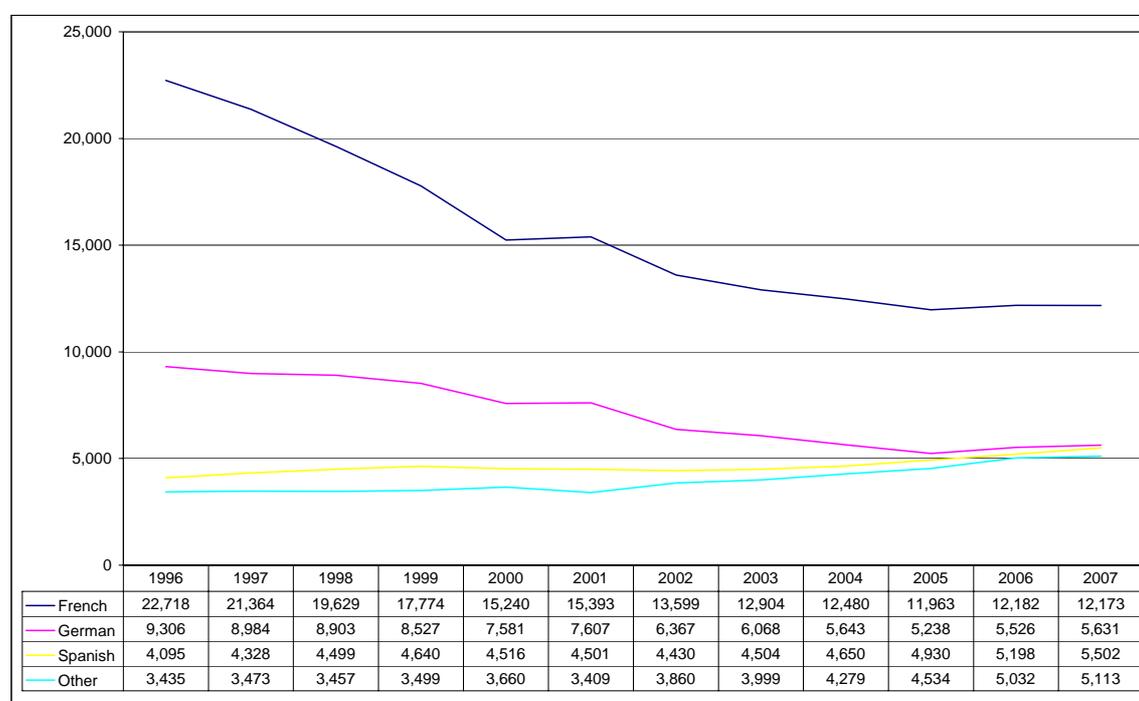
A2 level language entries

Over the period 1996-2007 total A2 level language entries for 16-18 year olds in schools and colleges across England fell (by about 28%). However, there have been very marked variations in these trends by different languages:

- Entries in French and German saw large decreases of 47% and 44% respectively over this period. However, a turnaround in 2006 saw the first signs of stability for French and an increase for German for a decade (+2% and +7.5% respectively over the past 2 years).
- Spanish A2 level entries increased slowly from a lower base, with an overall increase of 34% over this period. Total Spanish entries (5,502) have now almost caught up with the total number of German entries (5,631)
- A proportionately large increase of 49% in A2 level entries for other languages (all languages other than French, German and Spanish) from 1996 to 2007 has occurred. This equates to an increase of about 1,700 and totals over 5,000 entries across all the other languages available.

Chart 11.2 below outlines these trends in more detail.

Chart 11.2: Trends in number of French, German & Spanish A2 level entries, England, 1996-2007



Source: DCSF

These trends have led to changes in the relative share that A2 level language candidates represent:

- French was taken by 10.4% of all candidates in 1996, but this figure was only 4.8% of total candidates in 2007.
- German fell from 4.3% to 2.2% over the same period
- Spanish has been fairly stable at around 2% of all candidates.
- Other languages saw a small increase from 1.6% of all candidates in 1996 to 2.0% of total candidates in 2007.

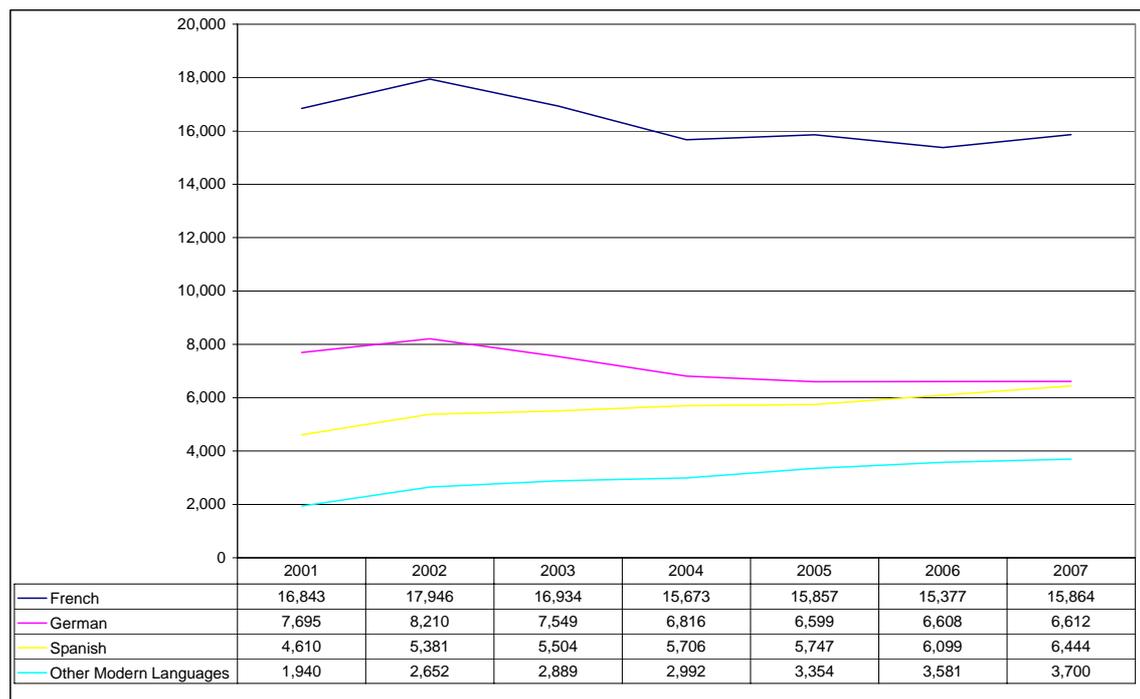
AS level language

AS level exams were introduced in the academic year 2000/01. Total language entries for AS level decreased from 2002 to 2004 but since then there has been a slow rise in total numbers, largely due to increases in Spanish and Other languages. Over the period 2002-2007

- French entries have decreased by 12%
- German entries have decreased by 19%
- Spanish entries have increased by 20%
- Other language entries have increased by 40%, but from a smaller base

All AS language entries have fallen from 4.1% of all AS entries in 2002 to 3.5% in 2007.

Chart 11.3 below outlines these trends in more detail.

Chart 11.3: Trends in French, German & Spanish AS level entries, England, 2001-07

Source: **Source:** DCSF

11.2.2. Wales

In relation to A and AS level entries in Wales:

- The number of A level entries in modern foreign languages decreased from 1,700 in 1992 to 1,300 in 2006.
- The number of AS entries in modern foreign languages by 16 year olds has increased from 990 in 2001 to 1,200 in 2006;

Table 11.8 highlights the changes in numbers of foreign language A Level examination entries in Wales by 17 year olds, by language subject, for the period 2003/04 and 2005/06. The analysis indicates that over this period a small decrease in the total number of such entries occurred of -34, or -3%.

- Decreases occurred in relation to French, German and Italian and Chinese, although numbers involved were relatively small
- Increases occurred in relation to Spanish and 'other' languages, but again, numbers involved were quite small.

Table 11.8: Change in number of foreign language A Level examination entries in Wales by 17 year olds, by subject

Language	Number of entries 2003/04	Number of entries 2005/06	Change in number of entries 2002/03 to 2005/06	% change in number of entries 2003/04 to 2005/06
French	853	836	-17	-2%
German	287	248	-39	-14%
Spanish	120	153	33	28%
Italian	22	11	-11	-50%
Chinese	24	19	-5	-21%
Other (1)	21	26	5	24%
Total	1327	1293	-34	-3%

Source: Statistical Bulletin, 30th August 2007; Statistical Directorate, Welsh Assembly Government (DCSF)

11.2.3. Scotland

Table 11.9 identifies numbers of students sitting new Higher Grade foreign languages in Scotland over the period 2000-2007 by language. The analysis indicates that over the whole period 2000-2007 in relation to the total for all foreign languages, numbers increased by 1,400, or 21%.

These increases were accounted for mainly by a rise in numbers of students sitting Higher Grade French (776 or 20%) and Spanish (629 or 106%).

Table 11.10 identifies numbers of students sitting Higher Advanced foreign languages in Scotland over the period 2000-2007 by language. The analysis indicates that over the whole period 2000-2007 in relation to the total for all foreign languages, numbers increased by 429, or 71%.

Again, these increases were accounted for mainly by a rise in numbers of students sitting Higher Advanced French (309 or 98%) and Spanish (74 or 140%).

Table 11.9: Students sitting new Higher Grade foreign languages in Scotland; 2000-2007

Language/Year	2000	2001	2002	2003	2004	2005	2006	2007*	Change 2000-2007	% change 2000-2007
French	3,797	4,272	4,771	4,886	4,614	4,515	4,292	4,573	776	20%
Gaelic	84	114	147	147	139	130	154	119	35	42%
Gaidhlig	41	66	72	75	91	102	124	97	56	137%
German	1,692	2,015	2,206	1,908	1,794	1,703	1,399	1,621	-71	-4%
Italian	143	188	284	263	269	292	236	225	82	57%
Latin	346	271	257	283	245	279	238	234	-112	-32%
Russian	12	5	14	23	17	19	9	16	4	33%
Spanish	591	831	916	1,045	1,081	1,162	1,058	1,220	629	106%
Classical Greek	6	14	8	5	13	16	7	7	1	17%
Total	6,712	7,776	8,675	8,635	8,263	8,218	7,517	8,112	1,400	21%

Source: Scottish Qualifications Authority

* These figures are pre-appeal from SQA

Table 11.10: Students sitting Higher Advanced grade foreign languages in Scotland; 2000-2007

Language/Year	2001	2002	2003	2004	2005	2006	2007*	Change 2000- 2007	% change 2000- 2007
French	315	574	636	712	599	642	624	309	98%
Gaelic	10	11	23	28	7	17	23	13	130%
Gaidhlig	11	14	11	11	23	21	23	12	109%
German	174	252	296	249	223	217	164	-10	-6%
Italian	10	23	26	14	14	43	32	22	220%
Latin	31	52	35	45	49	44	38	7	23%
Russian	3	3	4	6	9	3	4	1	33%
Spanish	53	143	132	148	158	154	127	74	140%
Classical Greek	-	3	-	2	2	5	1	1	
Total	607	1075	1163	1215	1084	1146	1036	429	71%

Source: Scottish Qualifications Authority

* These figures are pre-appeal from SQA

11.2.4. Northern Ireland

Table 11.11 identifies the number of Foreign Language GCE A Level Results in Northern Ireland by grade in 2007.

The analysis indicates that there were 1,152 GCE foreign language A Levels sat in 2007 accounting for 3.7% of all GCE 'A' levels sat in Northern Ireland.

682, or 59% of all foreign language GCE A levels sat were accounted for by French, 279, or 24% by Irish and 149, or 13% by German.

Table 11.11: Foreign Language GCE A Level Results in Northern Ireland by grade - 2007

Language/ Year	Number sat in 2007	% of total number sat	Cumulative percentage A	Cumulative percentage B	Cumulative percentage C	Cumulative percentage D	Cumulative percentage E	Cumulative percentage U
French	682	2.2	47.7	74.8	88.3	95.9	98.8	100.0
German	149	0.5	40.9	67.1	87.2	98.7	100.0	100.0
Irish	279	0.9	50.2	76.3	92.5	96.4	97.1	100.0
Other Modern Languages	42	0.1	26.2	85.7	92.9	95.2	100.0	100.0

Source: Joint Council for Qualifications

11.3. Conclusions

The proportion of all pupils taking languages at GCSE has been decreasing dramatically in recent years in both England and Wales.

- In England, 78% of all pupils were taking a language in 2001, 68% in 2004, 59% in 2005, 51% in 2006 and then the recent drop to 46% in 2007.
- In Wales, the proportion of 15 year olds entering at least one language GCSE in Wales has fallen from 46 per cent in 1996 to 30 percent in 2006.

In both nations, decreases in those taking French and German account for the majority of the overall decline.

In Scotland there has been an overall decrease of just over 12,000 such students or –62% of students sitting standard grade foreign languages in Scotland over the period 1999-2007. Although there have been increases in numbers undertaking Intermediate 1 and 2 level entries these increases only partially offset the substantial decreases in those qualifying at SCQF levels 3 to 5.

In relation to A2 level language entries, over the period 1996-2007 total A2 level language entries for 16-18 year olds in schools and colleges across England fell by about 28%, although there have been very marked variations in these trends by different languages.

Significant decreases in A level entries in modern foreign languages were also evident in Wales over the period 1992 to 2006 (by about 24%).

AS level exams were introduced in the academic year 2000/01. Total language entries for AS level decreased from 2002 to 2004 in England, but since then there has been a slow rise in total numbers.

In Wales the number of AS entries in modern foreign languages by 16 year olds has increased from 990 in 2001 to 1,200 in 2006 (an increase of about 21%).

In Scotland, increases in numbers sitting both Higher Grade foreign languages (21%) and Higher Advanced foreign languages over the period 2000-2007 (71%).

12. Providers views

12.1. Introduction

12.1.1. Providers

The providers interviewed for this chapter of the report were training providers for both foreign language and intercultural skills, covering a wide range of training provision including Further Education and Higher Education institutions, private sector training providers as well as freelance consultants and a military language school.

12.1.2. Range of provision

The providers that participated in this research programme ranged from specialist institutions or consultants with a relatively small number of learners or contracts, to colleges and universities with thousands of enrolments. The languages that are taught appears to vary in scope fairly widely, with some providers dealing with a wide range of languages, although most indicated that the most popular are French, German, Spanish and Italian.

“We cover all the main European languages so more or less anything that’s required to be honest...The main requirement on language training is the French, German, Spanish, and Italian I suppose but those are the 4 most obvious ones.”

The levels of training provided, and whether these are mapped to the National Vocational Qualification (NVQ) framework, also appears to vary.

“The people I deal with don’t understand NVQs and have no interest at all in that.”

“We don’t tend to use that because that’s not something that as far as our clients are concerned, it’s not something that’s generally required. I suppose most of them are in beginners to intermediate level really where particularly expect to have an existing knowledge of a language like French and English. They may already have some knowledge and they may have to go somewhere and they would be starting from more than a basic sort of level.”

12.2. Patterns of foreign language provision

12.2.1. Types of employer more likely to demand foreign language training

Most providers indicated that in terms of sectors, the types of employer that ask for foreign language training is quite variable. However, in most cases large organisations appear to be more likely to demand foreign language training for its staff than smaller organisations. Several providers indicated that the most common type of employer to ask for foreign language training is large international firms, such as international banking or legal companies, which need to be able to communicate across borders.

“It tends to be larger employers from experience... It’s often a part of a staff development take up you know...that they would offer a range of things that their staff could have, they have an entitlement to development money.”

It was also suggested that language courses are popular with public sector clients. This appears to be partly because of training needs, and partly because they have access to a relatively large training budget.

“There is more (Language training) with the public sector, I think they have more access to funds, I don’t know, our biggest contract by far is with Belfast Police... That’s our biggest one... Public sector, definitely. PSNI, Housing Executive, I am in touch with the fire brigade at the moment for Polish, French and Spanish and the European Commission have a regular contract with us.”

12.2.2. The main changes that have recently taken place in relation to language related learning and skill provision

Some providers commented that certain languages are becoming more popular: in particular, Chinese and Eastern European languages. However, by far the most important change that has recently taken place in relation to foreign language learning and skill provision appears to be a decline in the number of UK learners taking up language courses.

“Well, we have in fact lost students, lost languages in our main college provision.”

The ‘unwillingness of UK students’ to learn languages was a concern for several interviewees. Partly, this was seen to be due to the non-compulsory nature of languages in UK schools, though this was also put down to the “*insularity of (the) UK mentality*”.

“It has been really, really been miserable. For example we have taken a lot of Erasmus students from EU countries probably something like 300 a year and yet we are lucky if we can persuade 50 UK students a year to go out. It’s a whole cultural issue; it’s to do with... I mean 20 years ago in language teaching, there was a better mentality and a healthier attitude to a need to learn foreign languages than there is now which is quite shocking! But it is dramatically noticeable because I have worked in language teaching in schools and adult education and also on higher education and I have seen this very sudden .. decline (in the number of UK language students). So for most of our language classes in this college, most of the students in them are non UK students.”

One key driver of this decline appears to be funding, an issue that providers saw as crucial. It was thought that fewer people were prepared to take these courses because they are becoming more expensive. Companies, it was thought, will be less prepared to pay for these courses as they become more expensive, and it is feared that provision will suffer.

“A lot of people are not prepared very much for it, that’s one of the issues that we find is...prices are quite sensitive to a lot of companies... they want to pay less for this kind of training, definitely.”

This is linked to a reduction in funding for languages training from the government.

“Funding, that’s what’s driving it. Funding of adult education. Just looking at our number of stats for long courses over the last 3 years. In 04-05 it was 579, last year 06-07, 488. When we do short courses as well, so you know, that’s what the whole provision is interesting to see that dip in long course provision from nearly 700 to just touching on 500 really.”

Many providers target companies rather than individuals, and often public sector clients. Here, changes in training policy by large employers can severely affect numbers of learners. For example, one provider lost a large number of course entrants when a large manufacturing plant relocated. Others are concerned that their funding from local authorities could be cut, and this will hit their ability to provide effective languages provision.

“What’s about to hit us is a reduction in funding by the local authorities here. I think the purse strings are being tightened all around... we are having to fight much more to try and keep languages at the top of the agenda and I don’t know what’s going to happen for next year yet. New provision have been taken but we know we are under threat, we know that our budget could be cut so we are trying to fight that.”

With all these changes, one provider feels ‘lucky’ to be able to offer as many courses as they do.

“Well certainly here at the college we’ve been quite lucky to have the breadth of languages on the offer that we’ve got...20 odd languages, to have that and we have been really lucky and I do use that phrase because outside in other colleges you just lose all the provision because one of the problems of course is that no direct funding for it you know i.e., for someone to come along and learn a bit of Greek for example. So I think there has been a big change there in terms of the government looking in line with the skills agenda with tangible benefits and languages themselves by definition do not really fit it too well.”

12.2.3. Changes anticipated in the future

Again, the issue of cuts to funding of foreign language provision appears to be of particular importance. Most providers thought that in the next 3-5 years, language courses will become more expensive.

“(I) see it becoming more expensive. We are lucky we are able to offer as much as we do I think and we have to take up what we have.”

This appears to be a UK-wide problem that affects language providers in fairly disparate regions of the UK. One provider commented that:

“For example the diplomas that I was talking about... (are) very expensive, so we would anticipate that maybe we wouldn’t be able to run it because numbers would probably drop. The provision at entry level...since they sort of receive basic funding but we were used to and hence funding a little top up for those and I think for languages we might not get that next year again and we were trying to explore avenues to fight it but at the moment we don’t know. But there doesn’t seem to be a huge commitment to languages on the part of the local government.”

Another provider, that attracts individuals rather than employees, finds that many of their learners are not from ‘affluent areas’. It was thought that an increase in the cost of the courses will affect the ability of the learners to study. Again, this is seen as a general trend:

"I don't know whether we will reach a point where that will you know...there are lots of demands on people's money and use of languages has become very expensive...then it might become much more difficult for us. It's not good I think. We are very pleased that we still offer as much as we do, we have got a really good team of tutors here and we think we do a good job which is one reason why we keep students but we are fighting against our national picture that is quite bleak for us, isn't it."

Another provider, based in London, thinks that in response to this problem, language provision will have to reduce and colleges may have to react by specialising in particular languages:

"I think across London maybe here at the colleges as well...languages will come more under threat because of the fees. So either what's going to happen is languages provision itself, say at our level, FE level, you know basic thing, are going to dwindle even further or I think what we would get is what we are hoping for our own position is that there will be kind of London wide centers for languages, so somebody wants to do German but its not in their borough they are going to have to come to (name of provider) or some other FE college in London, it can't be just be beacons for the last person standing kind of colleges, I would suggest."

One provider thought that in the few years, it will become imperative to tackle the decline in UK students studying languages with a national emphasis on the need to learn other languages:

"Well I think we can try a whole national shift in awareness and approaches and attitudes and that will come and if it does comes at all through increased emphasis on language teaching and learning and the need for it. It really, really puzzles me that even though now globalization is something we talk about freely and openly that actually young UK people are very, very reluctant to be involved."

However, generally, it was thought that it is very difficult to anticipate changes and 'plan ahead'. Employers are not able to think long-term for languages, and training needs appear to be largely short-term. This makes it hard to anticipate changes.

"Absolutely, that is always a difficult one and we often don't get much time to make arrangements and the same applies for cultural training as well, often short notice."

12.2.4. Types of provision most popular with employers and learners

The types of provision that training providers found to be most popular with employers and learners varied between providers interviewed. Firstly, in terms of the type of language that was most popular, some thought that traditional areas such as Spanish were still the most popular, usually with adult learners, while employers are sometimes now asking for a wider variety of languages linked to overseas business development. Some provide English language training, and found that the demand for ESOL (English for speakers of other languages) classes has grown:

"At the moment there are a lot of enquiries for English as a foreign language or ESOL, it's huge and that is a very big one for us!"

This change has been mainly in the last few years, and is linked to a growth in employment of migrant workers. The college is now employing a lot more ESOL tutors.

Interestingly, one college, that provides both subjects, noted a link between languages and intercultural skills, pointing out that what employers are mostly looking for is a level of 'cultural awareness'.

"What I am thinking of and again because we are not always directly approached for languages, its cultural awareness, I don't need to stress that bit."

However, one common issue is that employers appear to want short, intensive courses. Providers face a challenge in trying to respond quickly to short-term business needs:

"It varies so much, it varies from one month to the next really but I think probably the most popular formula is if somebody is going soon to wherever it is or needing their skills uplifted by a short time so they tend to go for intensive training and the usual formula is a couple of hours once or possibly twice a week... It might be over in say something like 15 weeks, typically we do between 14 and 40 hours training for each program."

Employers appear to have short-term needs and seek a wide variety of languages. Commonly, providers appear to get around this problem by employing a range of freelance trainers to teach a variety of languages. One provider commented that they have a 'bank' of tutors that they can call upon:

"They usually tend to want it quite quickly, so on the whole I think if we can offer it, if we know people, we have a bank of tutors that we use and if we can offer things then we can do, if its something we can't really hand on offer properly then we don't attempt to do that, you know we wouldn't be scrabbling around trying to find someone with a Pole who speaks Chinese to get some business, when we know probably that, that's not going to very well delivered and in the end that's counter productive. I think it's really important to know that you can do it well, if you are going to do it."

Usually, these short courses do not appear to lead to a qualification. Providers indicated that if there were significant demand for a recognised qualification, they would offer it, but this does not appear to be required by their clients. However, this does appear to vary, particularly depending on the individual employer. Interestingly, one provider commented that some large employers, with training plans, appear to use qualifications as a way of measuring progress against investment:

"They've always been quite keen to have something with a qualification attached to it, partly because there are funding implications for them as well and also I think because...certainly at (name of company) it was a way to measure progress and a way for the employer to see how someone was progressing and for the individuals to see how they were progressing and it has been useful for people's CVs to have a qualification, to have an accreditation of your learning. So I think employers do generally like to have something like that and employees do as well whereas people who come here in the evening generally aren't interested in a qualification. You know they just want to come and enjoy it. So I think work place learning, the qualification is more important probably."

12.2.5. Areas of foreign language related provision that does not adequately meet employer demand

Most providers thought that there were no significant areas of foreign language related provision that does not adequately meet employer demand. The key reason for this appears to be that providers are mainly reacting to employer demand with short-term training appropriate to each employer's needs. As a lot of training appears to be bespoke, it was generally considered that providers can meet demand.

“There never has been a case where an employer has phoned us and we haven't been able to provide what they needed.”

One provider noted that employers are now recognising that there are limitations to what can be achieved in such a short time.

“I think they have got quite a bit of choice, there are a lot of people out there offering the service and I think that probably they are more realistic these days about giving a quick fix. I get this impression these days that people are more sensible about what they expect to get out of it.”

The only significant problem involved in meeting this demand appears to be the difficulties in funding. As a result of this, one key trend appears to be a growth in the market for translation. One provider commented that this rise is linked to a decline in language provision:

“It's interesting that the people who have been involved in language training a lot of them are now... who offer language training and translation, a lot of those had balance in their relative turnovers in those areas...shifted towards the translations, doing now two-thirds translations and one-third language training, it is very typical of a lot of providers that we know.”

The reason for this shift appears to be wholly linked to employer demand. Translation appears to be seen as a more 'profitable' market:

“Because the demand for translations is greater than demands for language training... the only reason that they make that shift is that they find translations more profitable now than language training... and some people have dropped out of language training altogether and just stuck to translations.”

Interestingly, one provider noted a 'tension' between accredited training and work-based learning. It was commented that the timescales involved do not always fit around learner's work patterns:

“I think one of the difficulties that we've met is that is that, if its an accredited provision, then people have to make progress within a certain time scale, for example, If you start level 1 French in September this year, then you are supposed to finish this by July next year and if you (do not)...then the LSC will say that that's a failure, whereas actually you may have gone off to France for 6 weeks in the middle of it or there are all sorts of ways that you may have improved your language skills but haven't finished your qualification in the time in office...and there is tension between success within a space of time and real success as you can understand what I'm saying.”

“So that's the tension. Because in work based learning you have quite a lot of absenteeism because of work meetings , so you may not achieve the level that you set out to achieve in the time allotted...but that doesn't mean that you don't achieve it slightly later than that. You may have to take time out for work projects and things. That's always a difficulty with accredited learning I think. But it doesn't always fit peoples work.”

12.2.6. The need for new foreign language provision

It was generally considered by foreign language training providers that there is no significant need for any new foreign language provision. The reason for this seems to be that providers are largely reacting to employer demand:

“I think its all there, it's all being provided; it's all available really... we are very much responding to what's required at the moment.”

It was thought that they can provide for employers' needs and there is nothing that is in demand at the moment that they cannot supply.

“Nobody is knocking my door down.”

This provision appears to be highly reactive and depends very much on local needs. This does mean that providers are meeting demand where possible, but also that meeting demand can present a problem. One provider commented that finding good tutors to teach short-term courses can be a difficulty:

“(We have) offered Japanese in the past because...we have (company name) here, so you know I think that's drives it, it really just depends on what the local need is. Probably the difficult things with things like that is knowing that you got good tutors who're available unless you have got someone who really delivers well, best not to deliver at all I think; but you can't keep a Japanese tutor just for the...on the off-side to get a little bit of work here and there. That can be, I think that's quite a difficulty with languages, you know, it's very specific, isn't it, people's skills don't overlap that much.”

One provider commented that, in order to stop the decline in demand for foreign language provision, promotion of languages is needed first and foremost. Interestingly, the college pointed out that there may be a 'pool of talent' for language training tutors studying ESOL that providers could 'tap into'. However, it was thought that the key issue is raising awareness, explaining the advantages of foreign language training:

“What there is a need for is much more awareness amongst employers of what they are missing out on really and I think we need to be more active on that front. At the moment I think that the provision we have in place is quite wide and we would be ready to take on new languages and new challenges. I think we have a great pool of people in the ESOL population...ESOL student population. What we have find that... we were looking for Lithuanian last week for interpreting and what we found was that we had a trained Lithuanian interpreter in one of our ESOL classes. So there is a pool of talent there that we could tap into if we needed. I think that the first thing, the crucial thing that we need is to raise the stakes of employers and to tell them that they can't keep operating the way that they have been but we need to phrase that right! Tell them the advantages of languages but anyway that's what we are more and more trying to do.”

12.2.7. Areas of foreign language related provision with poor take up from employers

Mostly, there appears to be no area of foreign language related provision with poor take up from employers. This is largely because providers are responding to employers' needs, providing bespoke training. The problems appear to be in resources, though providers indicated that if languages were in demand, they would deliver them.

“German I think is the least popular language, not so much with the employers because again if they wanted that, they’ll ask us for it and we will deliver but certainly with adult’s learners, it’s the languages that we that we struggle most to keep going as well.”

12.3. Patterns of intercultural provision

12.3.1. Types of employer more likely to demand intercultural training

Similarly to the providers of language training, intercultural training providers indicated that by sector, the employers that they deal with are a “*real mix*”. One provider, however, commented that common industries to demand intercultural training are the types of company that have diverse workforces:

“Some sectors realize that there are issues because they have much more diverse workforces than others and in that I would put construction, I would put agriculture, I’d put public transport,... catering and hospitality, retail...”

In terms of size of company, providers agreed that it is usually large companies that demand intercultural skills training.

“I would say a good 75% of our work is for blue chip companies.”

One possible reason for this is that large, multinational companies are more likely to send staff to work abroad. Interestingly, one provider suggested that small companies sometimes ask for intercultural training, and this depends on the sector. High-technology sectors have a need for international communication:

“Oh yes... classically the companies that bought and buy a lot of intercultural training tend to be the larger companies. They tend to be companies which require or oblige some staff to working abroad either as part of graduate development program or as part of... or talking about senior staff who go on executive placements to run overseas subsidiaries for example. Smaller companies sometimes look for intercultural training as well particularly if they... certainly seems that, some companies which are in the high-tech sectors, biotechnology, information technology for example tend to get exposed to quite high level international transactions, pretty quickly and pretty suddenly and so they have been known to buy people in.”

Also, it was suggested that there has been an increase in demand from the public sector.

“Yes, hospitals, educational institutions, other forms of welfare agencies who are finding themselves very, very much exposed to cultural issues either within their staff or within their personnel or within their client base.”

Interestingly, one significant provider of intercultural skills training suggested that the client base is now diversifying, commenting that:

“Every buyer isn’t the same in this field anymore, there used to be you know... it all used to be about multinational and small medium sized enterprises earlier and now it’s far broader than that.”

This change could be a challenge for providers to respond to a variety of demands:

“Yes... I think it is an opportunity and a challenge at the same time but you can’t go to the market with a single message. It has to be customized; it has to be needs based... I think that kind of level of complexity needs to be explored a little bit on a sectoral basis whether it’s public or private sector.”

One interesting issue is that, again, companies that are more likely to demand intercultural skills training appear to be foreign companies, or companies with a European dimension in their outlook.

“I would say mostly European rather than British companies. I have a feeling that the Europeans are a bit more tuned into this than the British.”

Within the UK, there does appear to be a lack of awareness of intercultural skills training.

“A lot of employers that I have come across confuse - and I don’t mean to be rude to them - diversity training with intercultural skills training.”

“When you actually start talking to employers about, where is your improvement/recruitment focus, who is going to fill and sadly quite often it’s the lower skill jobs, who is going to fill those? How are they going to be filled? And how are you going to manage them? And then it’s kind of, it’s an awareness raising program naturally.”

“I had a meeting with someone last week or before last and they said that actually we didn’t know it was an issue until you made us stop and think about it.”

One provider indicated that the initiative to study intercultural skills usually comes from the individuals rather than the company:

“The initiative usually comes from the students rather than from the company... in a way I suppose we are preaching a little bit to the converted because we get students who... because they are linguists, because they have studied communication studies or cultural studies or so they understand the need and they are the ones who are the driving force. They go to the employers and say, look I’d like to do this are you prepared to support me?”

The individual learners that take the courses vary widely. As with languages, intercultural skills are not always popular with UK learners. One provider indicated that intercultural skills training is more popular with foreign students:

“I have to say that a good many of them are not British quite a few of them are European students or even American students or Canadian students and even we have had far eastern students as well who have done this MA. British students tend to be in a minority.”

12.3.2. Changes that are taking place in relation to intercultural related learning and skill provision

Intercultural communication is a relatively new discipline, particularly in a business environment, but has an extensive history. It was thought by several providers that development of intercultural provision is difficult within the UK due to the lack of interest. However, there are signs that it is becoming more popular.

“In this country at least you are hitting your head against a brick wall sometimes! And I think that a lot is being done... and I suspect we are further down the road than we were. Because when we started I think not many people had a clue about what was being talked about and I think the fact that the term intercultural is becoming much more used, I think is helping.”

In particular, it appears that the use of the term ‘intercultural’ has been a growing trend. One provider commented that:

“We were one of the first ones to actually use the term intercultural communication 12 years ago and there were not many of them around... it’s more people getting on the bandwagon and it’s really good that we are a part of it because I think Europe is now using the term in intercultural dialogue, intercultural awareness, and this is the year of intercultural dialogue in Europe officially.”

The most important driver of demand for intercultural skills appears to be the global economy. Since companies are dealing with people from other countries and cultures, their employees now have to have a level of cultural awareness. Several providers suggested that the demand is largely coming from countries that do business abroad, more so than from companies with a multicultural workforce.

“Yeah I mean that’s changed as well within the last five years, the number of... the investing companies which invest in cultural training, intercultural training has gone up I mean obviously as direct investment has increased across national borders.”

“It’s relocation of employees from one place to another due to internationalization, that’s what it is all about. People who are going on overseas assignments or alternatively coming into UK or are coming into UK on assignments from other countries.”

In particular, the countries and regions that companies most want to study now appear to be south Asian economies such as India, and in particular, China:

“Well if you are talking about different cultures and countries, the major shifts that have happened in the last few years then of course there has been much more interest in China over the rest of the world.”

Some providers therefore thought that in the future, continuing growth for the intercultural skills sector could be expected. This appears to be mainly due to the demands on increasing globalisation. One provider commented that:

“Unless there is some kind of an economic slowdown, there is no reason at all why that kind of thing shouldn’t keep growing. And then on the other hand as we said because of migration, because of human migration larger numbers of people are ready for moving within the European union’s 27 countries, clearly there are more and more people arriving in the UK and in other countries who need some kind of support, and I think that the government’s proposal for citizenship, education etc, are all going to impact on this field and it will only grow.”

Interestingly, one provider indicated that one driver of demand for intercultural provision could be as a way of ‘coping with’ language difficulties without learning other languages. Intercultural skills provision could thus be seen as a short-term training need that can address these problems. Paradoxically, the decline in language training may be fuelling a demand for intercultural skills:

“I have got a sneaky suspicion it might also be teamed with...by some of the sort of pressures on language teaching these days. You know our language departments are under pressure because people in this country seem to not want to study languages... and because the schools are cutting languages out of the curriculum encouraged by the government to do that and falling numbers. I only think all that might be making departments look at other ways of getting people to realize that you have got to actually make an effort to communicate cross-culturally and if you are not going to learn languages then you need to be aware that people are coming from different cultures and are going to operate differently, perceive each other differently and I think that some of us hope that you know ultimately that might lead people to realize...perhaps I do also in addition to this understand a little bit of how their languages work, to get inside their minds. So, it might be bit of a kind of change in trends in trying to use intercultural awareness or intercultural training dimension to make people realize that it’s good for them to understand each other.”

However, it appears that one key difference between languages and intercultural skills provision is the level of staff that participate in such training. One provider pointed out that learners on intercultural skills programs tend to be quite high-level members of staff:

“I think yes I mean there is a bit of a contrast there with language training there, intercultural training tends to be a little bit more targeted, a little bit more critical and its felt that a senior member of staff can spend one or two days on an intercultural training program and get some benefit from it whereas putting that person on a language training program is less likely to yield significant benefits.”

In terms of delivery, one key change in recent years appears to be an increase in bespoke training. In particular, one significant provider commented that large organisations are interested in online learning, perhaps indicating a desire for greater flexibility of delivery.

“The bigger companies are trying to find online or e-learning or remote solutions...we do that.”

“All our own training is bespoke... I think there could be a shift towards much more bespoke.”

12.3.3. Types of provision most popular with employers and learners

The type of provision most popular with employers and learners appears to be short, intensive courses. These are thought to suit the subject well.

“Many organizations like the intensive 1-2 days thing which once again are a little bit easier to sustain than language training, not many people who can put up with 1, 2, 3 days of language training, of foreign language training but it is possible to put together quite intensive courses in intercultural communication... I think it's very well suited to intercultural experience.”

“Longest we ever do is 3 days...2 days but really most of them are 1 day.”

In terms of the type of material learnt on the intercultural skills courses, there appeared to be differences in how each provider approached this. Some providers suggested that training needs to be very specific and focused, looking in particular at one country or culture. In this regard, it was commented that:

“The learning needs to be, it needs to be pragmatic, it needs to be very, very focused in terms of what it seeks to achieve obviously the issue of culture is infinitely broad and wide and deep and so companies, anybody investing in this would want to be reasonably sure that specific needs in terms of needs of the organization or the needs of employees are being met.”

“It's mainly country briefing, specific country briefing either on the UK or another country where they are heading towards.”

However, other providers appeared to approach this with the idea that a more general level of cultural awareness was more effective. In this regard, one provider commented that:

“They wouldn't be specifically one, it would be more about the skills, the know-how, the knowledge you need to work effectively with people from different cultures. There may be occasions when you get, especially with the Muslim community, where... people want us to look specifically with them, for example... dos and don'ts and what should we know, their major holidays and that sort of thing.”

Again, this appears to depend on the individual client's needs. Intercultural skills provision at present appears to be highly reactive and bespoke to each employer. Using an example of a large bank they have recently worked with, one provider explained this situation as follows:

“Depends on what the banks are looking for... so one wanted Gujarati with a very specific focus and the other one I am talking to at the moment its about China and India, that's where they want to go to, that's where they want to become a big player in and so... now other ones are of course saying to me, ok south east Asia is looking interesting but can you put together something and this is the general bit where I can understand or my team can understand and I can have some cultural awareness about the countries involved in south-east Asia. So theirs a more general skill set but obviously with a slight focus, so instead of doing intercultural or cultural awareness for every country in the world...do it at a very general level... it is non-country specific, it tends to be regional, that's coming through at the moment because that's the way their business use is and has been set up.”

12.3.4. Areas of intercultural provision that does not adequately meet employer demand

Providers of intercultural skills training appear to attempt to meet employer demand with bespoke training wherever possible. However, it was indicated in this regard that one problem with meeting demand is the lack of a focused strategy to intercultural training by UK employers.

“I think the trouble is that it is just very patchy and the reason is that there isn’t a focused approach. I think that’s the problem, it’s a bit... can’t find the word... it’s a bit piecemeal because its when need arises people say, oh gosh, I need to do something about that... and also there is a belief that it has to be terribly academic and actually my view is that if it has to be successful it needs just to really be practical.”

In other words, UK employers often do not appear to have thought long-term about intercultural skills. Here, it was commented by one provider that many employers are not aware of the provision that would best meet their needs:

“No because actually quite often what I do, I am working almost on a consultant basis, working out what needs are... because actually I don’t think they know... a lot of them don’t know what they want and again that’s not meant in a negative way at all.”

In particular, several providers noted that there is a link between intercultural awareness and diversity training. The differences between these types of training, it was thought, are not always understood, and this appears to be causing problems, particularly in relation to public sector clients. One provider commented that:

“Well depends on what you call intercultural provision, I think there has been a lot of what’s it called equality or diversity based training which has been taking place for the last few years... which, I am sure that there are some good practitioners but I am equally sure there are some skimpy and some pretty kind of psychologically shallow approaches which have been taken which are really just there to meet policy requirements rather than to meet the need of learners. I think in some circumstances there has been some evidence that policemen, fire, service and personnel have been required to take courses which really are just to tick a box.”

Lastly, with regard to course delivery, one provider noted that providers will struggle to meet demand if they cannot be flexible enough with interactive online learning, commenting that:

“I would definitely think so for some other sort of online or interactive tool, if you are not out there then none of them quite hit the mark... I think it is to do with contents and usability really.”

12.3.5. The need for any new intercultural related provision

Several providers thought that there is “*definitely*” a need for much more intercultural skills provision. One intercultural training consultant commented here that there is a need for more intercultural provision at two levels:

“Yes I see a need for intercultural provision at two levels, one is actually within the workforce and that’s you know both managers and supervisors and even for people working with other cultures and just a whole awareness thing, effective communications, proper behaviour and all that sort of thing, and I do as well for working with customers.”

It was also thought that cultural awareness will be an increasingly important issue in the future, particularly for the public services sector.

“I think I mean within the UK context I think definitely within the public service sector, the whole idea of cultural awareness really needs to be ingrained within training whether it’s the police force or nurses or the civil servants I don’t know what... because we are all kind of dealing with people from different cultures and backgrounds now in our jobs and I think that is really important for the future within the UK, definitely yeah.”

In terms of course content, one provider thought that there is a need to think generally rather than in terms of specific countries and cultures.

“Because I think the minute you start making things specific you then ignore some of the... you by definition ignore other cultures and I think a lot of intercultural stuff is about awareness and knowing how to stop and think of that rather than saying, with that group I should be doing this and with that group I should do that, that never works!”

Interestingly, one provider commented that language training is important in giving a good grounding in intercultural awareness. There appears to be an important link between languages training and intercultural skills here. In this regard, it was commented that:

“I think it is for the country to promote languages learning much, much profusely than it is already. I personally don’t think that new kind of intercultural awareness without having learned at least one language well and all the students will get had... just occasionally you will get somebody who is not... got the general level and...you will notice the difference in terms of awareness and I don’t know how you can really understand.”

“You know we are going to be dealing with in an international global world and then everybody ought to at least have language, at least up to the GCSE level and at the moment they don’t have and I think we need strong language provision. The government is currently making the noises but then those responsible for it I think don’t quite know how the two ends meet. I don’t think the current and primary training approach is adequate or good and I think it is important that students should get quickly attuned to learning foreign languages and I think it needs a better strategy at that level and I think it needs to be continued right through secondary education at least in the European requirements you know which we are currently not doing. It’s a very, very bold recommendation; I recommend that everybody should learn 2 languages.”

One language provider also commented on the importance of ‘cultural awareness’. It appears that some employers are asking for a mixture of basic language skills and cultural training:

“What we actually do is, we do a lot of work interests coming through there for cultural awareness rather than languages per se...but I mentioned Gujarati to you earlier and that was particularly because a private bank wanted that done but they wanted a mixture of very basic entry level Gujarati but backed up with the culture so that they would be more effective dealing with their customers...potential clients and actual clients from that community.”

12.3.6. Areas of intercultural provision with poor take up from employers

Several providers indicated that, quite generally, intercultural skills training has poor take up from UK employers. This is linked to a general lack of awareness and lack of investment. One provider commented that there is poor take up of intercultural provision:

“More or less quite across the board I would have thought... I mean for every good case that organizations like CILT or UK Trade and Invest identify there are numerous cases where needs exist and employers haven't...decided to invest any money in it and as we all know whenever the economy takes a little bit of a downturn training is one of the first things that's affected within businesses and organizations.”

Another provider indicated that, in particular, management staff are reluctant to participate in intercultural training:

“Probably management, management don't take up the courses as much as I think they probably should and I think that is more of a...kind of an ego thing...they don't feel there is really a need.”

One college interviewed targets individual learners rather than employers. Here, the take-up depends on promotion. But again, the interest tends to come from foreigners rather than UK learners.

“Well it really depends on how good is your publicity and how you are getting to them but quite often we find people come to us and say, we didn't know about your course otherwise we would have done it before. So publicity is an issue but I think that's a local issue of ours rather than anything wider... But I have to say most of that interest is coming from abroad... it's coming from the States and it's coming from Europe and to some extent its coming from the Far East...I find it quite interesting that most of the interest has come from outside, it's sad really.”

12.4. Views on employer buy in and needs

12.4.1. The importance of foreign language and intercultural training to employers

With regard to languages training, the extent to which employers see the importance of this appears to be quite variable. One specialist provider commented that employers “*absolutely*” see the importance of this, commenting that:

“I have got business all the time; there is never a quiet period.”

However, others recognised the difficulty in attracting UK students and saw a need for greater promotion of the importance of languages training.

“There certainly is, oh gosh there is a huge need! Yes, yeah. But well they can’t get UK students, they can’t get UK employees coming in on the language skills so... they are few anyway so suddenly as I said, there is a huge, huge multilingual workforce in the UK now.”

In this regard, there was a concern that UK businesses are using migrant workers to gain a multilingual workforce, and UK students may be losing their competitive edge. Again, this very much depends on the individual employer, but there is a concern that the growth in intercultural skills training is largely related to foreign companies with a European outlook, while UK companies lack a strategy for intercultural skills training:

“It depends on the employer...It’s a hard one. I don’t think they perceive it as being very important, until something comes along. So I wouldn’t think many employers have a strategy. Obviously with a company like (name of company) they are unusual, because part of their resource I think would be that they are a French company and they want to use that culture in their company and they are here and that drives that. With British companies, particularly smaller ones I wouldn’t think they have a strategy of training employees.”

“Well they do recognize the importance of it but it’s not top of their agenda and time is precious and time pressures and financial pressures etc. I think language is certainly...they are aware of it...they are aware that they would function better in overseas market if they had languages but it’s taking that step and also taking a step of exporting whatever and exploring foreign markets which seems very scary for them.”

In other words, this lack of strategy could be a significant problem for UK businesses. The language problem appears to affect overseas business opportunities, and could mean that UK organisations are losing a competitive edge and could get left behind. One provider, based in Northern Ireland, commented that businesses can operate only in English-speaking areas:

“You know they trade mostly with the Republic [of Ireland] and mainland UK and the USA and that’s it...because of the language problem.”

This lack of strategy means that training needs are mostly short-term.

“It’s fire fighting, I think... they realize they are going in 3 weeks to a trade fair and they need to get their act together. They think of everything else, beautiful promotional literature, brochures, letter heads and every thing else and then they think who is going to talk about these things!”

With regard to intercultural skills, it is clear that the sector needs a higher profile. Employers often have not thought about this and are not aware of it. One provider commented in this regard that:

“Not really! I think that lot of people don’t really understand it until they actually do it.”

Some providers explained that there is still a ‘case to be made’, and once the advantages of intercultural skills training are explained, companies are more likely to see its importance, although this also depends on the type of company, with large banks or legal firms perhaps having a more focused approach to this type of training.

“So if you get an international bank or even an international legal firm they are going to be more aware of it and for the need to have more effective communication whereas others perhaps who haven’t an international dimension have not thought too much about it but when you talk to them about how they were to teach admission for interacting with potential or future customers and you said there is an international market, how you are going to deal with it? They go, I don’t know what you are talking about and then you get to pitch in and talk about how important it is. And yeah to an extent and I only say to an extent it’s not a golden cure, the Olympics have slightly helped with that here in London because people talk about different nationalities coming and all the challenges and that brings them the communications but its certainly I think, it’s not as difficult as maybe 5 years ago talking about the importance of languages or talking about intercultural awareness but it does depend on the firm or the company that one is talking to.”

One provider commented that it is becoming “*increasingly common*” to be asked to explain the business case for intercultural skills training. This provider was convinced that investment in cultural training has clear business benefits:

“I mean it’s in terms of all sorts of things I mean certainly there is evidence that if you actually respond well on a cultural basis then you know sales will improve, the customers are happier you know repeat business and certainly workforce motivation and is... can actually be much higher because that will make people feel that they are part of a team. So therefore your staff turnover goes down and recruitment costs go down, so there are all sorts of benefits.”

However, one significant provider did indicate that there is more awareness of the importance of intercultural skills than in the past. It was commented that:

“Yes I do, I think that the business dimension is likely to continue to grow, there is more and more importance of the awareness of these things on a strategic level... more and more people are being asked to show this sensitivity that...that used to be reserved for the international traveller.”

“Yes that’s true now, I think it has changed I mean there has been a real change in the last 5 to 10 years. I don’t think you need to argue the case anymore. Whether they actually do something about it, is another matter!”

One possible reason for an increase in the importance of intercultural skills training to UK businesses is that the courses tend to be shorter and less expensive. One provider commented in this regard that:

“Cultural awareness is a bit easier to pick up in a short time of course than a full blown language and of course with a language sitting on its own, because one requires quite a lot of contact hours and therefore it’s expensive. The moment they move that professional to another country they would have to start all over again ”

12.4.2. The importance of foreign language qualifications to employers

The importance of foreign language qualifications to employers appears to be, again, quite variable. Some employers appear to value qualifications, and in this regard it was commented that:

“Yeah. They definitely do. They want to know what they've paid for.”

However, the majority of employers appear to be interested in having their specific requirements met and do not see qualifications as relevant. Typically, it was commented that:

“No, they are interested in developing skills and that’s it really. We get very little requirements for qualifications. We have done them in the past but there is just no desire for them now.”

With regard to the individual learners, it was thought that they also do not see qualifications as important. Providers appeared to indicate that if there were a demand for qualifications, this demand would be met – but this demand simply is not there.

“I think it’s the same, they have got a short time span, they haven’t got much time available, they just want to get the skills that they need to do the job. I know for sure if we were being asked for qualifications on a regular basis we would be providing that service but we are not. We used to do more before than now to be honest.”

12.4.3. Methods of delivery preferred by employers in relation to foreign language training and intercultural skills training

With regard to languages, intensive short courses tend to be preferred. This is usually in work premises and mostly once a week. Some providers run group classes for around 6 or 7 people, while others provide one-to-one sessions. This can be ‘chunks’ of around 10 weeks, although sometimes courses last for a full year of academic study. However, most training appears to be bespoke and so the method of delivery can vary.

“It’s difficult to say what new things are going to come along. Most of our training is bespoke so we are not big on IT enabled learning, sometimes people do self study but very often they are under pressure at time and at work and the only time they really get to focus on it is when we put them together with a trainer, that’s what they really are there for... that sort of contact hour.”

One college has not yet entered the market for longer courses, because it makes more business sense to offer short courses.

“The message is coming through that its got to be tailored and short you know I am talking about 10 weeks here, so you are talking about 20 contact hours and they want a visible improvement but very much based around the working environment.”

It was thought that providing effective language training in such a short course was possible, and the key thing here is managing expectations.

“The reason I say it’s doable is because if you want to and they key word here is expectation, so its actually managing the expectations, the needed deliverables that you can expect for 4 weeks or 6 weeks or 10 weeks and then yes we can deliver those and that’s the important bit...I don’t know if a college or school or whatever in this game, is to understand, to educate the client about the actual performance uplift that you are going to get out of say 2 hours rather than a 10 hour course in one day and so an emerging course and that’s the important bit.”

Again, the key to delivery appears to be flexibility.

“We need to deliver flexibility...different learners want different things... the tutors are having to deliver quite a wide range in the learning spectrum.”

With regard to intercultural skills provision, it was thought that this too can vary quite widely depending on the employer and depending on the sector.

“Depends on the industry... some I would say are more office based, we look at e-learning as well as other bespoke provisions. Some especially have very diverse groups where language is also an issue; we look very much at face to face very small group provision, some one to one I mean it really depends.”

However, it appears that the most important key theme is that provision has to be tailored to the individual employer. Providers also discussed the ‘interactive’ nature of such training:

“They are mainly around the workshop model... very interactive and very tailored. So it’s again about the flexibility it’s got to be tailored and pertinent to their own circumstances of what they want to get out of it themselves.”

“In the way it’s delivered...most people really just want kind of a light interactive session, a lot of people once we explain to them, the thing is a lot of people come for cultural awareness but they don’t actually know what it is and... once you sit down and explain to them why...it’s not just a case of sending someone new and how to be able to speak in Japan...we need to be a lot more kind of participant-centred in terms of understanding of well who are they and how they interact with Japan and these sorts of issues. Once they understand that...then we can become a bit more interactive.”

12.5. Other views

12.5.1. Progression routes

With regard to languages training, most providers thought that there are sufficiently clear progression routes, and that everyone is aware of these. One provider commented that awareness of this would be raised at the initial discussion with the employer:

“Maybe not when they start, but I think a good tutor would make them aware of the routes that they could take and if you are working with employers then that would be part of your initial discussion probably, where they could go next or how far you might want to go.”

However, these progression routes are not always used, as many employers’ training needs appear to be very short term.

“It tends to be fairly short term I should say; we don’t have a great deal of long term commitments.”

“We do get people coming back for repeat business but they are asking for us to do the same short course for somebody different rather than continue the training of somebody who we have trained before.”

Progression routes are generally seen to be important within the colleges interviewed. Interestingly, one provider pointed out that link between language training and intercultural skills means that a background in one can be beneficial to the other.

“It does mean that if people come to us at master’s level without any actual modules that call themselves intercultural awareness then you sort of got to do kind of grounding coming in. But you hope if they come with a languages degree or cultural degree then they’ve actually got possibly a substantial amount of cultural awareness that you’d want them to have.”

12.6. Cost and quality of provision

12.6.1. The importance of accreditation of training to employers in relation to foreign language skills and intercultural skills

With regard to language skills, interestingly, one provider pointed out that there is some level of desire for accreditation because this can imply funding.

“Also because we can offer it more cheaply because if it’s accredited there will be a certain level of funding at the moment. So we don’t have to offer it to them at full cost that will make it a little bit cheaper for an employer but that again is changing, I think there is less and less funding but there is still some funding for accredited learning... Because if there was no accreditation... so it’s always worth exploring whether accreditation is appropriate because there will be some funding that you can get to counter costs.”

However, most providers indicated that employers do not see accreditation as important.

“Accreditation is not necessarily important for short courses by them but the problem is that we don’t get funding from government if a course is not accredited. Although obviously if an employer is going to meet the cost of a course then it is not an issue but it’s not top of their priorities. Their priorities are... I think for the skills that they need for their own sector, manufacturing or whatever.”

The majority of provision does not appear to be accredited, and this is simply because this is *“not what the learners want”*. Employers and learners are simply interested in meeting their needs.

“They...all particularly do not want accreditation/qualification. What they want is obviously delivered on site at a time that suits them and normally at a pretty short period.”

Similarly, with regard to intercultural skills training, there appears to be little demand for accreditation of training courses or qualifications.

“Some people ask for certificates that they have attended the course that we provided but certainly not a recognized qualification.”

In this regard, it was again commented that employers simply want their needs to be met.

“Nobody is banging on my door...and it’s very rare in fact for employers across some other provisions in the soft skills training to say, I want an accreditation. Most of the time its like, here are my training needs can you address them?”

One of the reasons for this lack of accreditation could be that many providers are still developing their intercultural training provision.

“I think accreditation is...yes of course it is something that we think about but we are just trying to see what works and what doesn’t work before we actually get that far.”

Interestingly, this has been linked to the idea that employers often lack a long-term plan and are largely looking for a ‘quick fix’.

“Not to the ones I have ever worked with, no ,no....no I suppose that where it would become important would be where the organization has already signed up to accreditation for one scheme or another you know so if they are wanting to get people accredited for the Chartered Institute of Marketing or Personnel Development or something like that then if you can tack on intercultural communication on to that kind of program you will get a different response but unfortunately many of us do actually just take the approach which I have just described which is, if they do something, if they put on a 1 or 2 or 3 day program they think that to some extent they’ve dealt with that.”

In this regard, an approach to promoting intercultural skills training could be to link it with professional institutes, promoting the training as a long-term professional qualification.

“You have to take a different approach I think if you want the accreditation thing to work. I think that would involve working in much more partnership with professional institutes rather than trying to sell it to employers as a free standing thing... These organizations which do have that kind of more formal qualifications based link with their clients and so I would certainly approach that market on a kind of an institutional level or rather than approach the market first. I think you need to get to the market through people that the employers associate with medium to long term learning aims.”

In the majority of cases, accreditation does not appear to be an issue.

“No... from our experience we are very rarely asked for it... for them it’s more important that people that they are sending on the course has an outcome in terms of the project they are going to, the work they are doing, that the team starts to communicate better, more effectively or the sales person that they just sent out to Japan comes back with a contract... so for them I don’t really think it’s that important. When you come down to things like public services that’s where I think that accreditation would really start to have its rep as it were. But I mean we are not asked for it, for that sort of thing, it wouldn’t be welcomed by them really.”

12.6.2. Bespoke foreign language training/intercultural training programmes

The provision of bespoke foreign language training programmes appears to be an exclusively bespoke basis.

“It has always been tailored to them.”

“We don’t run any enrolment courses; we do everything specifically bespoke to each individual or group of people.”

In this regard, providers appear to be highly flexible in responding to employers’ needs. Some providers run courses for languages that they did not run until recently and have experienced difficulties in responding to this niche demand at short notice.

“We don’t do many languages at the moment because margins are the poorest with employers, all our stuff is tailored. For example, we didn’t do Gujarati until we were asked for it then I could actually source somebody, the quality tutor we need and so we could actually reply to them and I had to say to the bank that I was dealing with, I would try my best but there is a possibility that I may have to turn around and say no because I can’t find a tutor that’s not up to the standards that we want, but as it turned out we could do that... at the moment if the employer has got the need and I can actually provide it then we will deal with it because that bit about expectation and flexibility.”

While providers were insistent that they will run courses wherever possible, it does appear that this level of short notice responsiveness can pose a problem for planning.

“It’s quite reactionary in that respect so when I hear a phone call from country x, can you do this? Ok I will see what I can do; cost being the training times delivery or they might just say, it’s too expensive, and not interested... it’s hard to plan resources and staff...so there is a bit of confliction there.”

Bespoke training appears to be crucial to foreign language providers. Providers spoke of the importance of a consultation with employers to discuss their requirements:

“In the end I think with employers, what you have to do is to respond flexibly to what they need and talk to them about how you could- because they don’t always realize that you are willing to be flexible and that you are willing to look at different models of delivering, it’s important to have that discussion.”

They are often not aware of what would suit them best.

“If you can get them to talk about their needs face to face, that’s probably... because they will ring up and ask you for one thing, and if you say to them -do you realize that you could have this or this or you might want to do it differently. They haven’t always thought about all these things. I think a dial up is quite useful.”

Interestingly, providers also pointed out that sometimes while much of the material is specific, there are elements of the provision which is generic. Often, specific vocabulary is added to the basic ‘framework’.

“A lot of jobs that we take up from companies to do bespoke vocabulary would be built in but again that’s more further down the road because to start with they all have got to learn the basics and you can’t do anything with specialized vocabulary unless you have got a framework to fit them into.”

Although it's often the same kind of things that people need it's not ...there may be an element of professionalisation but also the generic skills that you need at a certain level, but it's the vocabulary that's specialized often, but if you are doing level 2 you would need to have a certain ability to describe things and so on whatever the sector that you are in... and the specialization comes really from the vocabulary. The social side matters too, in that if you are going to go abroad you are not going to be working all the time, you are going to have to mix with colleagues in a social context but that's also relevant."

With regard to intercultural skills training, most providers also work with employers to provide bespoke training. However, it is perhaps more common to begin with a 'core' section and 'adapt' the rest of the course.

"We are actually already looking at that because what's happened is that we have actually generated a core module, a core offering if you like but some of the stuff will have to be adapted depending on the industry...because (the training) is practical and very interactive, some of the examples there wouldn't work in some industries and so...for construction it could be one thing and if it's transport it could be something else."

For example, one provider takes an approach that has a core section but 50% bespoke training. The level of bespoke training is quite pragmatic.

"Yeah it's bespoke insofar as you take... you have a kind of a 50% core in terms of what you deem to be core conceptual content but then you need to adapt that to specific learning needs or specific kind of professional or industrial nature of the employer. So yeah you don't go anywhere with a 100%."

This is because it has to suit the individual employer's needs.

"You can't say, you going to write a brand new course from scratch for that employer because that's just not possible. By the same token you don't say to any employer, you know here is our off the shelf package for you, this is what we deliver to a fire service, you are never going to do that either! It is bespoke but in terms of core content and concepts and theories and tools and approaches yeah I mean you are never importing 100% or exporting 100%."

The majority of employers, then, appear to prefer bespoke, tailored courses for the content and vocabulary. This tailoring to the role is seen as increasingly important to satisfy employers.

"Off the shelf would never really meet the demands or the needs of the participants. And if we have a company come to us and say, we are sending three employees to work out in Japan for 6 months and we take an off the shelf manual and give them, I don't know, the usual history of Japan, this is the communication style, this is a business meeting etiquette which is all fine and well but its not going to be as good as a course that goes and understands what their roles are going to be in Japan, where they are going to be in the company there...are they going to be managers? Are they going to be subordinates? Who are they going to be meeting with? Are they going to be doing a lot of socializing? If they work for a PR company there is going to be lots of wining and dining. So all these things help us understand what that person actually really needs... So that's why the bespoke approach is so much more effective."

12.6.3. National language standards

The use of national language standards by language providers appears to be quite variable.

Some providers use national language standards in developing the courses.

“I think probably as long as you are pitching at your standards at the right level and its skill based then it will work... They are used pretty much across the board I think... no, I can't think of an instance where they are not.”

Another has found that the mapped standards are clear and easy to use.

“Well we have, well we map the diplomas to the European languages ladder and it's the same really. So really yes some of the qualifications are mapped exactly to their standards... we are mapped to the CILT standards... We find them very easy to use, very clear... they made our job very much easier.”

However, some providers had concerns that national languages standards are not always appropriate.

“We sometimes do and we sometimes refer to those in our estimating how long its going to take someone to get but it tends to be when there is a lot of training required to get somebody up to quite a high level. Most of the time what's available is fairly limited in terms of time and I mean yeah that's it really. It's limited in terms of time and funding they are prepared to put into it really.”

Providers generally indicated that that employers would rather keep language training and cultural training separate.

“For parts of the program yes but it has to be said that many employers don't really like looking at...in my experience employers don't like looking at the issue of language at the same time as looking at the issue of culture.”

12.6.4. The role of national bodies in the promotion of language and intercultural training provision

Some providers thought that there was a role for national bodies to play in raising the profile of foreign language and intercultural training provision.

“I think first what providers need is a national football. So I suppose that's a role that CILT can play, I think is to keep the profile of foreign language learning at the forefront because it is quite uphill work ... changing employers up to relevance of learning. so I think that probably for me that would be a role for CILT really, somewhere it is a role for CILT but it seems to me important that there is that national pulling together of our energies really. Because language learning is immensely satisfying and it has all sorts of spin-offs in terms of work, you know employability skills really.”

It is clear that this ‘pulling together of energies’ is needed on a national and regional level as a way of promoting the importance of languages and cultural skills.

12.7. Conclusions

12.7.1. The nature of delivery

The key trend in relation to both language skills and intercultural training provision for employers appears to be the flexibility of delivery. This appears to be crucially important to effective provision.

Language and intercultural skills courses are increasingly bespoke, catering to niche demand. This bespoke training is very common, and it is clear that most provision is largely responding to demand with training that is very much tailored to the needs of the individual employer.

One concern providers have here is the lack of a strategy from UK businesses. Most training needs appear to be short-term, and provision is highly reactive to the short-term needs of employers.

Providers face a challenge in trying to respond to these mostly short-term business needs. As a consequence the current provision of foreign language and intercultural skills to employers is highly reactive. Provision is seen as 'patchy', and this lack of employer strategy can make it difficult to plan ahead. Interestingly, many providers commented on a lack of a focused approach from UK businesses in particular, commenting that many foreign companies have a more focussed strategy for language and intercultural skills training than UK companies.

The fact that employers' needs largely appear to be short-term can also be seen to undermine the take-up of progression routes. Providers generally indicated that progression routes are in place but are rarely used. There appears to be some work required to encourage longer-term thinking.

12.7.2. Demand for language provision

The most important change in the demand for foreign language provision has been a lack of take-up from UK students. Many providers have experienced a decline in numbers in recent years, and this appears to be a common problem across the board.

In particular, the non-compulsory nature of languages in UK schools was seen as a major issue affecting this. Neither the government, through the education system, nor local authorities were seen to show a 'real commitment' to language training.

Some providers saw this as a general cultural problem, and talked of tackling it with a *'national shift in awareness and approaches and attitudes'*.

Significantly, it was thought that the lack of UK interest could become a problem for UK businesses. It was suggested that UK organisations are losing their competitive edge, and often only operate in English-speaking nations due to the language barrier.

Because of this, providers saw the future as 'bleak'. The providers that still offer a wide range of courses saw themselves as 'lucky' to be able to do this.

Clearly, funding is a particularly crucial issue. Providers commented that courses are becoming more expensive, which is affecting levels of learners. Providers have found that employers are sensitive to the price and are keen to pay less.

Indeed, overwhelmingly, funding appears to be the biggest issue in changes to provision. In the future, providers see language provision becoming more expensive, placing language courses in further jeopardy. It was commented that some courses will be dropped if they continue becoming more expensive.

12.7.3. Demand for intercultural skills provision

In contrast, intercultural skills provision appears to be enjoying an increase in popularity. In the future, this could lead to continuing growth for the sector. Several providers thought there was “*definitely*” a need for more intercultural skills provision.

Globalisation appears to be the key driver of this demand. There is a sense that investment in intercultural training is increasing along with investment across borders.

In particular, an interest in China has been a major shift. Companies setting up abroad in emerging markets, often those such as China and India, have a new need for a level of cultural awareness. Because of this, providers thought that in the next few years the intercultural skill training sector will continue to grow.

It was even suggested that the increase in popularity may be linked with the decline in demand for foreign language training. It has been seen as another way of making an effort to communicate cross-culturally, without having to learn a full language. It was said that cultural awareness can be picked up far quicker than a full foreign language, and high-level employees often get a lot of benefits from short courses.

The increasing popularity of intercultural training has also been linked with increasing cultural diversity within the UK. It was commented that employees and individuals are dealing with people from different cultures and backgrounds regularly, so cultural skills will be increasingly important for the UK’s future.

Interestingly, some providers saw a link between language and intercultural skills, suggesting that language skills would give a student a good grounding in cultural awareness. The lack of strong language provision, including the non-compulsory nature of languages in UK schools, was again seen as a problem here for intercultural skills providers. This appears to be a fairly significant issue.

In terms of the nature of this demand, short, intensive courses appear to be preferred. Providers noted that 1-2 days’ intensive courses are said to be “*very well suited*” to intercultural skills provision.

Again, training here appears to be highly reactive and bespoke to each employer. Providers noted the importance of a consultation with employers to identify training needs and address them. One method of this provision that appears to be common is having a degree of ‘core conceptual content’, adapting the rest to meet the needs of the individual employer.

However, one important issue in the nature of current demand for intercultural skills training is that the impetus is said to come from abroad. Several providers noted that employers that take up intercultural skills training tend to be those with a European dimension or outlook, while many individual learners have foreign backgrounds. It was said that “*British students tend to be in a minority*”, and while demand is growing, most of this interest has come from outside the UK. There appears to be some work required to promote the benefits of this to UK employers.

12.7.4. Accreditation and qualifications

It appears that to most employers, accreditation of languages and intercultural skills courses are not important at all. There appears to be very little demand for qualifications. While some providers noted that some employers are keen to take up courses with qualifications, many employers seem to be interested only in having their needs met with minimal disruption to the working week.

Indeed, there is an overwhelming sense that employers lack a clear long-term training plan for language and intercultural skills and are simply looking for 'quick fix' solutions.

There appears to be quite some work needed in order to establish and promote the benefits of accredited training, leading to recognised qualifications. Partly, it was suggested that there is a 'tension' between the timescales of accredited training courses and the need to maintain flexibility. However, providers indicated that if there were sufficient demand for this, it would happen.

12.7.5. Promotion of language and intercultural skills training

Many providers considered that languages and intercultural skills require more effective promotion at a national level. It was thought by providers that it is necessary to raise awareness and explain the benefits of foreign language and intercultural skills provision. In particular, it was thought that the business case needs to be made.

Both languages and intercultural skills providers were very concerned about the lack of interest from UK learners. While language providers noted an increase in the demand for ESOL (English for speakers of other languages) and translations, it appears that the impetus for the increase in demand for intercultural skills provision is largely coming from foreign companies and learners.

While providers noted the importance of language and intercultural training, it was indicated that there is still a 'case to be made'. In particular, it was noted that it is increasingly common to be asked to explain the business case for intercultural skills training. The business benefits of such training were thought to be increased customer satisfaction, repeat business and workforce benefits such as greater staff retention. This aspect is perhaps worthy of further research and promotion on a national level.

On the whole, provision appears to be quite disparate. While there is a clear need to maintain flexible ways to deliver, a level of common ground would be useful in developing languages and intercultural skills provision within the UK.

13. Conclusions on the supply of skills

13.1. Overall trends in provision

The analysis undertaken in relation to the supply of language skills to the UK economy reveals quite dramatic reductions in provision across secondary education, further education and higher education.⁹⁸

13.1.1. Secondary Education

- The proportion of all pupils taking languages at GCSE has been decreasing dramatically in recent years in both England and Wales. In both nations, decreases in those taking French and German account for the majority of the overall decline.
- In Scotland there has been an overall decrease of just over 12,000 such students or –62% of students sitting standard grade foreign languages in Scotland over the period 1999-2007. Although there have been increases in numbers undertaking Intermediate 1 and 2 level entries these increases only partially offset the substantial decreases in those qualifying at SCQF levels 3 to 5.
- In relation to A2 level language entries, over the period 1996-2007 total A2 level language entries for 16-18 year olds in schools and colleges across England fell by about 28% and by about 24% in Wales, although there were marked variations in these trends by different languages.
- The position in relation to AS level qualifications in England and Wales and Higher level qualifications in Scotland is slightly more encouraging in relation to language provision.
 - Although total language entries for AS level decreased from 2002 to 2004 in England, there has since been a slow rise in total numbers.
 - In Wales the number of AS entries in modern foreign languages by 16 year olds has increased from 990 in 2001 to 1,200 in 2006 (an increase of about 21%).
 - In Scotland, there have been increases in numbers sitting both Higher Grade foreign languages (21%) and Higher Advanced foreign languages over the period 2000-2007 (71%).

13.1.2. Further Education

- The 2006 Survey of vocational related language learning in Further Education (FE) undertaken by CILT as part of their Language Skills Alliance work demonstrates a serious erosion of the languages infrastructure in the FE sector.
 - Fewer than half (44%) of the FE colleges offer opportunities to learn languages alongside vocational courses

⁹⁸ It should be noted that although a number of private sector providers were interviewed, a full review of private sector language provision was beyond the scope of this research study

- More than a quarter (27%) of those offering vocationally related languages courses has reduced this provision
- Of the colleges that do not currently offer vocational language provision, just over a third (36%) did so in the past
- Nearly half (42%) felt that student numbers would fall in the following academic year, while just under a third (32%) thought they would increase

13.1.3. Higher Education

- Data from 2002/3 to 2005/6 highlights a 6.2% overall decrease in first-degree language undergraduates. This compares with a 9% increase in total HE first-degree students across all subjects. Over this period decreases in enrolments are evident in French, German, Italian, Scandinavian studies, Russian and Eastern European studies and other European languages. However, in relation to Spanish and Portuguese, numbers increased.
- By contrast 'other' undergraduate language enrolments at UK Universities increased over the period 2002/03 to 2005/06 by 2,370, or +10.6%.
- Recent postgraduate numbers of language students are rising, largely due to an increase in overseas postgraduate students. However, UK domiciled postgraduate numbers are fluctuating. There are marked differences in these trends evident by language subject with declines in enrolments evident in relation to French, German, Japanese and South Asian Studies and increases in postgraduate enrolments in relation to 'other' Asian studies, African studies, Modern Middle Eastern studies and 'Other' European languages.
- Many students of other disciplines are taking language modules at universities in the UK. A host of different study routes are provided through language, certificates, diplomas, modular credits and extra-curricular learning opportunities. However, data on students of other HE disciplines that are studying a language accredited alongside their degree is very difficult to accurately capture due to the varied nature of provision.

13.2. Provider views

13.2.1. The nature of delivery

The key trend in relation to both language skills and intercultural training provision for employers appears to be the flexibility of delivery. This appears to be crucially important to effective provision.

Language and intercultural skills courses are increasingly bespoke, catering to niche demand. This bespoke training is very common, and it is clear that most provision is largely responding to demand with training that is very much tailored to the needs of the individual employer.

One concern providers have here is the lack of a strategy from UK businesses. Most training needs appear to be short-term, and provision is highly reactive to the short-term needs of employers.

Providers face a challenge in trying to respond to these mostly short-term business needs. As a consequence the current provision of foreign language and intercultural skills to employers is highly reactive. Provision is seen as 'patchy', and this lack of employer strategy can make it difficult to plan ahead. Interestingly, many providers commented on a lack of a focused approach from UK businesses in particular, commenting that many foreign companies have a more focussed strategy for language and intercultural skills training than UK companies.

The fact that employers' needs largely appear to be short-term can also be seen to undermine the take-up of progression routes. Providers generally indicated that progression routes are in place but are rarely used. There appears to be some work required to encourage longer-term thinking.

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In particular, the non-compulsory nature of languages in UK schools was seen as a major issue affecting this. Neither the government, through the education system, nor local authorities were seen to show a 'real commitment' to language training.

Some providers saw this as a general cultural problem, and talked of tackling it with a '*national shift in awareness and approaches and attitudes*'.

Significantly, it was thought that the lack of UK interest could become a problem for UK businesses. It was suggested that UK organisations are losing their competitive edge, and often only operate in English-speaking nations due to the language barrier.

Because of this, providers saw the future as 'bleak'. The providers that still offer a wide range of courses saw themselves as 'lucky' to be able to do this.

Clearly, funding is a particularly crucial issue. Providers commented that courses are becoming more expensive, which is affecting levels of learners. Providers have found that employers are sensitive to the price and are keen to pay less. Indeed, overwhelmingly, funding appears to be the biggest issue in changes to provision. In the future, providers see language provision becoming more expensive, placing language courses in further jeopardy. It was commented that some courses will be dropped if they continue becoming more expensive.

13.2.3. Demand for intercultural skills provision

In contrast, intercultural skills provision appears to be enjoying an increase in popularity. In the future, this could lead to continuing growth for the sector. Several providers thought there was "*definitely*" a need for more intercultural skills provision.

Globalisation appears to be the key driver of this demand. There is a sense that investment in intercultural training is increasing along with investment across borders.

In particular, an interest in China has been a major shift. Companies setting up abroad in emerging markets, often those such as China and India, have a new need for a level of cultural awareness. Because of this, providers thought that in the next few years the intercultural skill training sector will continue to grow.

It was even suggested that the increase in popularity may be linked with the decline in demand for foreign language training. It has been seen as another way of making an effort to communicate cross-culturally, without having to learn a full language. It was said that cultural awareness can be picked up far quicker than a full foreign language, and high-level employees often get a lot of benefits from short courses.

The increasing popularity of intercultural training has also been linked with increasing cultural diversity within the UK. It was commented that employees and individuals are dealing with people from different cultures and backgrounds regularly, so intercultural skills will be increasingly important for the UK's future.

Interestingly, some providers saw a link between language and intercultural skills, suggesting that language skills would give a student a good grounding in cultural awareness. The lack of strong language provision, including the non-compulsory nature of languages in UK schools, was again seen as a problem here for intercultural skills providers. This appears to be a fairly significant issue.

In terms of the nature of this demand, short, intensive courses appear to be preferred. Providers noted that 1-2 days' intensive courses are said to be "*very well suited*" to intercultural skills provision.

Again, training here appears to be highly reactive and bespoke to each employer. Providers noted the importance of a consultation with employers to identify training needs and address them. One method of this provision that appears to be common is having a degree of 'core conceptual content', adapting the rest to meet the needs of the individual employer.

However, one important issue in the nature of current demand for intercultural skills training is that the impetus is said to come from abroad. Several providers noted that employers that take up intercultural skills training tend to be those with a European dimension or outlook, while many individual learners have foreign backgrounds. It was said that "*British students tend to be in a minority*", and while demand is growing, most of this interest has come from outside the UK. There appears to be some work required to promote the benefits of this to UK employers.

13.2.4. Accreditation and qualifications

It appears that to most employers, accreditation of languages and intercultural skills courses are not important at all. There appears to be very little demand for qualifications. While some providers noted that some employers are keen to take up courses with qualifications, many employers seem to be interested only in having their needs met with minimal disruption to the working week.

Indeed, there is an overwhelming sense that employers lack a clear long-term training plan for language and intercultural skills and are simply looking for 'quick fix' solutions.

There appears to be quite some work needed in order to establish and promote the benefits of accredited training, leading to recognised qualifications. Partly, it was suggested that there is a 'tension' between the timescales of accredited training courses and the need to maintain flexibility. However, providers indicated that if there were sufficient demand for this, it would happen.

13.2.5. Promotion of language and intercultural skills training

Many providers considered that languages and intercultural skills require more effective promotion at government level. It was thought by providers that it is necessary to raise awareness and explain the benefits of foreign language and intercultural skills provision. In particular, it was thought that the business case needs to be made by national governments.

Both languages and intercultural skills providers were very concerned about the lack of interest from UK learners. While language providers noted an increase in the demand for ESOL (English for speakers of other languages) and translations, it appears that the impetus for the increase in demand for intercultural skills provision is largely coming from foreign companies and learners.

While providers noted the importance of language and intercultural training, it was indicated that there is still a 'case to be made'. In particular, it was noted that it is increasingly common to be asked to explain the business case for intercultural skills training. The business benefits of such training were thought to be increased customer satisfaction, repeat business and workforce benefits such as greater staff retention. This aspect is perhaps worthy of further research and promotion on a national level.

On the whole, provision appears to be quite disparate. While there is a clear need to maintain flexible ways to deliver, a level of common ground would be useful in developing languages and intercultural skills provision within the UK.

14. Gap analysis

14.1. Introduction

The purpose of this chapter of the report is to draw together the conclusions on the overall LMI analysis in order to highlight gaps in the demand and supply of language and intercultural skills.

It has already been indicated that the tight timescales within which the research fieldwork, analysis and reporting has been undertaken has meant that consultation on this aspect has been limited. This is a recognised gap that has largely been imposed by SSDA reporting deadlines. However, it is a gap that CILT intend to fill through wider consultation within the sector and with employers. The goal, following consultation, will be to develop broad based support for an action plan for the sector.

14.2. Why develop language and intercultural skills for business?

There is a large body of evidence that recognises that languages play a fundamental role in facilitating international trade. Communication in the language of our trading partners is an important factor in supporting a trading advantage. UK Government policy has consistently sought to achieve further expansion of world trade and productivity growth in the economy.

The Regional and National Language Skills Audits and other research has highlighted the dramatic impact of language skills shortages and gaps on actual or potential loss of business within different regions and nations of the UK.

Government policy supports the development of language and intercultural skills for business and each of the three national language strategies developed within the UK all stress the importance to the economy of foreign language ability.

Businesses invariably report significant and measurable benefit to their trading figures, and being able to use the language of the country is key to winning new and repeat business. In addition to this they see great benefits in their relations with clients and customers simply because they can communicate in their own language, and issues can also be dealt with more quickly.

Language and intercultural skills also form an important or an advantageous component of the overall skills make-up of a wide range of occupations and the language service industry adds value to all sectors. In this regard they are cross-sector skills.

If as Leitch suggests, the UK has to develop a world class skills profile and respond effectively to globalisation, then it appears that improved language and intercultural skills are fundamental to the success of UK plc in competitive international markets. In Europe it is increasingly recognised at national government level, and by the European Commission, that "English is not enough", not just for the UK, but for Ireland and for countries such as Denmark and Poland.

14.3. What is the current position of the UK in relation to language skills for business?

It appears that the UK remains at, or very close to, the bottom of the European league table in terms of competence in other languages. The competitive position of UK business in relation to languages is therefore, at best, poor.

Surveys have demonstrated that UK business performs relatively poorly compared to their European counterparts in respect of language strategies, acquiring staff with language skills, employing external language professionals, developing their websites and contemplating new markets. A range of such latent skills gaps and shortages in relation to foreign languages are interfering with business transactions and leading to loss of business.

Indeed there appears to be little evidence that the situation has significantly changed since the Nuffield report in 2000, which indicated that UK business held a complacent view of the importance of languages based on the position of English as the world's business language.

The UK continues to need to dramatically develop its capability in language skills if it is to continue to be successful in the global economy and more specifically address different aspects of the UK's deficit in the use of languages and intercultural skills by business.

It is estimated that this market failure of the UK in relation to language skills is very substantial and represents a huge barrier to trade (equivalent to about 5% of all British trade).

The language gap for businesses in the UK appears to remain extremely large.

14.4. How should action to address the UK language skills deficit be targeted?

There is some evidence that large and multinational companies in the UK have better developed language capacity than SMEs. Research also suggests that underinvestment in overcoming the language barrier to exporting may be particularly marked for smaller firms.

Evidence produced in the LMI research also suggests that there would be large returns to the UK economy from effective intervention to improve language skills available to potential exporters within SMEs. It therefore follows that intervention to improve the competitiveness of the UK in relation to language skills should be targeted towards SMEs in order that they can both see and exploit market opportunities for international trade.

In particular it appears that specific actions are needed to:

- Encourage SMEs to make greater and more planned use of language skills. There is a particular need to develop longer term perspectives and strategy towards the development of language and intercultural skills on the part of UK businesses.

- Provide SMEs with access to the resources to enable them to engage in language capacity building activity.
- Give business support agencies a clearer role maximising opportunities and promoting good practice and co-ordination of initiatives in language capacity building for business.

14.5. The supply of language skills

The analysis undertaken in relation to the supply of language skills has revealed a considerable decline in HE, FE and secondary language learning in recent years, which represents a serious erosion of the languages infrastructure in the UK.

14.5.1. Higher Education

Following the Dearing Review, 3-year funding from the Higher Education Funding Council for England has been agreed for *the Routes into Languages*⁹⁹ programme, initiated in Autumn 2007. The programme's aim is to widen participation in languages in Higher Education and to increase numbers of students taking languages in Higher Education.

In addition a review has been undertaken in 2005 on the role of Higher Education in the National Languages Strategy, which set out a range of policy recommendations.

14.5.2. Further Education

A range of funding issues facing FE appears to be largely responsible for the decline in FE language learner numbers and provision. However, low student interest in languages is also an important factor.

The reduced language provision contrasts with evidence of an increasing need for language skills within many sectors in the workplace, especially in the context of aiming to focus vocational learning on supplying the skills required by employers. Employers can, and do, employ foreign nationals where it is easier for them to access language skills in this way. This implies that reducing vocational language provision at a time when demand for language skills from employers is not declining will lead to UK nationals who are restricted in their ability to access international opportunities and have the competitive disadvantage in relation to their European counterparts for jobs both in and out of the UK.

There are many positive opportunities to develop languages in line with the needs of employers and in combination with sector-specific skills with the changing nature of post-14 Education. There are some successful results reported from colleges who can get over the motivational challenges of teaching some students on vocationally related language courses, by winning students over with good teaching and the argument as to how learning a language will benefit them, whether working in the UK or abroad. There is a clear need to promote and extend this good practice.

⁹⁹ <http://www.routesintolanguages.ac.uk>

The successful reinstatement of FE provision in line with new developments requires language learning to be strongly promoted, properly funded and given a high priority within the 14-19 specialist Diplomas. Further investigation into poor student motivation may be necessary as will be a major programme of staff development, for languages to be able to flourish within the FE sector.

Although a bespoke request was made through GoSkills to access Individual Learning Records (ILR) data from the Learning and Skills Council (LSC) in respect of Vocational and Educational Training (VET) provision for languages, the LSC were not able to supply any data within the timeframe associated with the LMI research. There remains a serious gap in current knowledge of FE provision.

14.6. Intercultural skills

When it comes to exporting to non English speaking countries the importance of language coupled with culture is readily accepted as crucial to export success.

By contrast, intercultural skills provision appears to be enjoying an increase in popularity.

Globalisation appears to be the key driver of this demand. The increasing popularity of intercultural training has also been linked with increasing cultural diversity within the UK. Because of these factors, providers thought that in the next few years the intercultural skill training sector will continue to grow.

One important issue in the nature of current demand for intercultural skills training is that providers feel that the impetus is coming from abroad. Several providers noted that employers that take up intercultural skills training tend to be those with a European dimension or outlook, while many individual learners have foreign backgrounds. It was said that "*British students tend to be in a minority*", and while demand is growing, most of this interest has come from outside the UK.

The realisation of the importance of intercultural skills has not, in many cases, yet been translated into utilising training provision.

Whilst the multilingual make-up of the UK's workforce represents a management challenge it also clearly represents a significant opportunity for the UK in terms of language capability.

14.7. Language teaching

Routes into language teaching in the state maintained sector require Qualified Teacher Status (QTR), usually via a postgraduate teaching qualification (PGCE) or an undergraduate course (BEd).

Applications for PGCE courses in Modern Languages in Great Britain in 2007 were down on 2006 by 8% in French, 10% in German, 18% in Spanish and nearly 11% in "other languages". (There was a slight increase in applications in Scotland and Wales which offsets higher declines for England – minus nearly 20% for German and Spanish).

The recent Dearing Report investigating ways of encouraging young people to maintain their language study at secondary level and into higher education recommended closer liaison between schools, colleges, universities and employers (now in place as the HEFCE-funded Routes into Languages project). It further included the recommendation that a wider range of languages (including Mandarin) should be available at secondary level.

Most recent figures for students studying languages at university suggest a slight increase after some years of decline. This needs to be maintained and further increased if the demands of the specialist language professions including teaching are to be met. Indeed, since teaching is at the front end of the supply chain, the potential for a vicious circle is clear.

14.8. Language training

MFL teaching in the Further Education sector has been in decline for some years, particularly in respect of vocationally related courses.

As funding and curricular changes have taken place, languages departments in FE have been closed or merged with other departments

Since 2007, lecturers in Further Education have been required to gain “Licensed Practitioner” (LP) status via the Institute for Learning. Those who were teaching in FE before 2001 are exempt from this requirement, although it is expected that employers will increasingly regard LP as the benchmark for appointment.

Due to the shortage of language teachers of specific foreign languages in FE many colleges rely on recruiting native speakers, many of whom are initially untrained. As a result of this, it is likely that there will be demand from this group and the as yet unregulated profession of business language trainers for qualifications to obtain LP status. It is not clear at this early stage whether capacity planning to cover the training implications for languages has taken place, but it is likely that there will be skills shortages or gaps for those required to provide the CPD as well as a new requirement for certification and assessment of the training.

14.9. Training and consultancy in Intercultural Working

Because of the relatively recent recognition of intercultural communication as a business skills area, there are at the time of writing no qualifications in intercultural working outside the Higher Education sector.

Business training is carried out by commercial training organisations (many of which are also language trainers) and by university departments’ commercial training sections.

Training in the private sector is, as with languages, unregulated.

There is therefore in this sector an urgent need for the development of qualifications based on the NOS, both as a means of introducing the potential for greater regulation of the sector and to establish norms for the training of trainers within the field.

14.10. Job functions within which linguistic or intercultural skills might be advantageous or necessary

An important part of CILT's work, which is encapsulated in the strategic vision of the Language Skills Alliance, is that of persuading employers to think strategically about the role and management of international communication within their organisation, whether this be in relation to the outside world or in relation to their own workforce.

An important tool in this process is at present missing: namely an occupational and functional map showing the job roles and functions within an organisation where the presence of language or intercultural working skills might bring efficiency gains or conversely might impair efficiency.

Identifying the job functions within which linguistic or intercultural skills might be advantageous or necessary will provide the crucial focus needed to engage employer interest in strategic skills planning.

14.11. National Language Strategies

The three language strategies produced for England, Scotland and Wales stressed the importance to the economy of foreign language ability. In Northern Ireland a review of language skill needs has been commissioned and is due to be published later in 2008. It is understood that the Welsh language strategy is currently under review.

However, the orientation of these strategies in relation to business was relatively limited and there still appears to be a massive job to be undertaken in raising employer awareness and addressing language skill needs in all four nations. There is considerable evidence that, in today's global economy, people in the UK could be at a disadvantage compared to their counterparts with language skills.

There appears to be an important gap in strategic thinking specifically for business in relation to the importance of languages to trade and exporting. Some means of regularly measuring the progress of business in bridging the UK language deficit is also needed. Perhaps most importantly there is a need to more specifically review the role of business in National Languages Strategies.

14.12. Provider views

Some providers believed that the declining demand for language provision was a general cultural problem, and talked of tackling it with a '*national shift in awareness and approaches and attitudes*'.

Significantly, it was thought that the lack of UK interest could become a problem for UK businesses. It was suggested that UK organisations are losing their competitive edge, and often only operate in English-speaking nations due to the language barrier.

It appears that to most employers, accreditation of languages and intercultural skills courses are not important at all. There appears to be very little demand for qualifications. While some providers noted that some employers are keen to take up courses with qualifications, many employers seem to be interested only in having their needs met with minimal disruption to the working week.

There appears to be important work needed in order to establish and promote the benefits of accredited training, leading to recognised qualifications. At the same time it is clear that this provision must be flexible and geared to meeting expressed employer needs.

Many providers considered that languages and intercultural skills require more effective promotion at government level. It was thought by providers that it is necessary to raise awareness and explain the benefits of foreign language and intercultural skills provision. In particular, it was thought that the business case for languages and intercultural skills training needs to be more powerfully made by national governments. The business benefits of such training were thought to be increased customer satisfaction, repeat business and workforce benefits such as greater staff retention. This aspect is perhaps worthy of further research and promotion on a national level.

Appendix One: Vocational Qualifications available in the UK

Table A1.1 Entry level language qualifications

Level	Qualification	Awarding Body	Ch	Fr	Ge	Gr	It	Ja	Ru	Sp	Ur	Other languages	Approved age range
Entry	Entry Level Award in Reading and Writing in another Language	ABC	Yes	Arabic, Danish, Dutch, Polish, Portuguese, Swedish, Turkish	All								
Entry	Entry Level Award in Speaking and Listening in another Language	ABC	Yes	Arabic, British Sign Language, Danish, Dutch, Polish, Portuguese, Swedish, Turkish	All								
Entry	Entry Level Double Award in Practical Languages	ABC	Yes	Arabic, Danish, Dutch, Polish, Portuguese, Swedish, Turkish	All								
Entry	Entry Level Certificate	AQA		Yes	Yes		Yes			Yes			All
Entry	Entry Level Certificate	EDEXCEL, OCR, WJEC		Yes	Yes					Yes		Welsh	All
Entry	Entry Level Certificate	CCEA										Irish	All
Entry	Entry Level Certificate	CCEA		Yes	Yes					Yes			No approval sought (England); Not specified (NI, Wales)
Entry	ICAAE Entry Level Certificate in Business Chinese (Speaking, Listening and Culture)	ICAAE	Yes										All
Entry	Entry Level Award in Language Skills (Entry 3)	NOCN	Yes	Arabic, Czech, Danish, Dutch, Gujarati, Irish, Panjabi, Polish, Portuguese, Swedish, Turkish, Welsh	16-18, 18+, 19+								
Entry	Entry Level Award in Languages for Travel and Leisure (Entry 2 & 3)	OCNW		Yes	Yes	Yes	Yes			Yes	Yes	Arabic, Gujarati, Polish	16-18, 18+, 19+
Entry	Entry Level Certificate in Business Language Competence	OCR		Yes	Yes		Yes	Yes	Yes	Yes			All
Entry	Asset Languages: Separate certificates for Listening, Speaking, Reading, Writing (Breakthrough)	OCR	Yes	Arabic, Bengali, Cornish, Gujarati, Hindi, Irish, Panjabi, Polish, Portuguese, Somali, Swedish, Tamil, Turkish, Welsh, Yoruba	All								

Table A1.2 NVQ Level 1

Level	Qualification	Awarding Body	Ch	Fr	Ge	Gr	It	Ja	Ru	Sp	Ur	Other languages	Approved age range
1	Level 1 Award in Reading and Writing in another Language	ABC	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Arabic, Danish, Dutch, Polish, Portuguese, Swedish, Turkish	All
1	Level 1 Award in Speaking and Listening in another Language	ABC	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Arabic, British Sign Language, Danish, Dutch, Polish, Portuguese, Swedish, Turkish	All
1	Level 1 Double Award in Practical Languages	ABC	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Arabic, Danish, Dutch, Polish, Portuguese, Swedish, Turkish	All
1	Level 1 Certificate (FCSE)	AQA		Yes	Yes (from 2008)		Yes (from 2008)			Yes			All
1	Level 1 Certificate in British Sign Language	CACDP										British Sign Language	All
1	NVQ Language Units	City & Guilds		Yes	Yes		Yes	Yes		Yes			All
1	NVQ Language Units	EDEXCEL	Yes	Yes	Yes		Yes			Yes		Arabic	All
1	NVQ Language Units	OCR		Yes	Yes		Yes			Yes		Irish	All
1	ICAAE Level 1 Certificate in Business Chinese (Speaking, Listening and Culture)	ICAAE	Yes										All (England & Wales); 19+ (NI)
1	Level 1 Award/Certificate in Language Skills	NOCN	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Arabic, Czech, Danish, Dutch, Gujarati, Irish, Panjabi, Polish, Portuguese, Swedish, Turkish, Welsh	16-18, 18+, 19+
1	Level 1 Award/Certificate in Languages for Travel and Leisure	OCNW		Yes	Yes	Yes	Yes			Yes			16-18, 18+, 19+
1	Level 1 Certificate in Business Language Competence	OCR		Yes	Yes		Yes			Yes			All
1	Asset Languages: Separate certificates for Listening, Speaking, Reading, Writing (Preliminary)	OCR	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Arabic, Bengali, Cornish, Gujarati, Hindi, Irish, Panjabi, Polish, Portuguese, Somali, Swedish, Tamil, Turkish, Welsh, Yoruba	All
1	Level 1 Certificate in Japanese	WJEC						Yes					All

Table A1.3 NVQ Level 1 -2

Level	Qualification	Awarding Body	Ch	Fr	Ge	Gr	It	Ja	Ru	Sp	Ur	Other languages	Approved age range
1,2	GCSE (Short Course)	AQA	-	Yes	Yes					Yes			All
1,2	GCSE (Short Course)	CCEA	-	Yes	Yes					Yes		Irish	No approval sought (England); Not specified (NI, Wales)
1,2	GCSE (Short Course)	EDEXCEL	-	Yes									All
1,2	GCSE	AQA	-	Yes	Yes		Yes		Yes	Yes		Bengali, Modern Hebrew, Panjabi, Polish	All
1,2	GCSE	CCEA	-	Yes	Yes					Yes		Irish	All
1,2	GCSE	WJEC	-	Yes	Yes					Yes			All
1,2	GCSE	EDEXCEL	Yes	Arabic	All								
1,2	GCSE	OCR		Yes	Yes					Yes		Dutch, Gujarati, Persian, Portuguese, Turkish	All
1,2	GCSE in Applied French - Oral Communication (Short Course)	EDEXCEL		Yes									All
1,2	GCSE in Applied French - Written Communication (Short Course)	EDEXCEL		Yes									All
1,2	GCSE in Applied French (Single Award)	EDEXCEL		Yes	-	-	-	-	-	-	-	-	All

Table A1.4 NVQ Level 2

Level	Qualification	Awarding Body	Ch	Fr	Ge	Gr	It	Ja	Ru	Sp	Ur	Other languages	Approved age range
2	Level 2 Award in Reading and Writing in another Language	ABC	Yes	Arabic, Danish, Dutch, Polish, Portuguese, Swedish, Turkish	All								
2	Level 2 Award in Speaking and Listening in another Language	ABC	Yes	Arabic, British Sign Language, Danish, Dutch, Polish, Portuguese, Swedish, Turkish	All								
2	Level 2 Double Award in Practical Languages	ABC	Yes	Arabic, Danish, Dutch, Polish, Portuguese, Swedish, Turkish	All								
2	Level 2 Certificate in British Sign Language	CACDP										British Sign Language, Irish Sign Language	All
2	NVQ Language Units	City & Guilds		Yes	Yes		Yes			Yes			All
2	NVQ Language Units	EDEXCEL	Yes	Yes	Yes		Yes			Yes		Arabic	All
2	NVQ Language Units	OCR		Yes	Yes		Yes			Yes		Irish	All
2	Level 2 Award/Certificate in Language Skills	NOCN	Yes	Arabic, Czech, Danish, Dutch, Gujarati, Irish, Panjabi, Polish, Portuguese, Swedish, Turkish, Welsh	16-18, 18+, 19+								
2	Level 2 Award/Certificate in Languages for Travel and Leisure	OCNW		Yes	Yes	Yes	Yes			Yes			16-18,18+, 19+
2	Level 2 Certificate in Business Language Competence	OCR		Yes	Yes		Yes			Yes			All
2	Asset Languages: Separate certificates for Listening, Speaking, Reading, Writing (Intermediate)	OCR	Yes	Arabic, Bengali, Gujarati, Irish, Panjabi, Polish, Portuguese, Turkish, Welsh	All								

Table A1.5 NVQ Level 3

Level	Qualification	Awarding Body	Ch	Fr	Ge	Gr	It	Ja	Ru	Sp	Ur	Other languages	Approved age range
3	Level 3 Award in Practical Languages	ABC		Yes	Yes	Yes	Yes			Yes			16-18, 18+, 19+
3	Level 3 Double Award in Practical Languages	ABC		Yes	Yes	Yes	Yes			Yes			16-18, 18+, 19+
3	Advanced Subsidiary GCE	AQA		Yes	Yes					Yes		Bengali, Modern Hebrew, Panjabi, Polish	All
3	Advanced Subsidiary GCE	CCEA		Yes	Yes					Yes		Irish	All
3	Advanced Subsidiary GCE	WJEC		Yes	Yes					Yes			All
3	Advanced Subsidiary GCE	EDEXCEL	Yes	Arabic	All								
3	Advanced Subsidiary GCE	OCR		Yes	Yes					Yes		Dutch, Gujarati, Persian, Portuguese, Turkish	All
3	Advanced GCE	AQA		Yes	Yes					Yes		Bengali, Modern Hebrew, Panjabi, Polish	All
3	Advanced GCE	CCEA		Yes	Yes					Yes		Irish	All
3	Advanced GCE	WJEC		Yes	Yes					Yes			All
3	Advanced GCE	EDEXCEL	Yes	Arabic	All								
3	Advanced GCE	OCR		Yes	Yes					Yes		Dutch, Gujarati, Persian, Portuguese, Turkish	All
3	Advanced Extension Award	CCEA			Yes							Irish	All
3	Advanced Extension Award	EDEXCEL								Yes			All
3	Advanced Extension Award	OCR		Yes									All
3	Asset Languages: Separate certificates for Listening, Speaking, Reading, Writing (Advanced)	OCR		Yes		Arabic, Polish, Portuguese, Turkish	All						
3	Level 3 Certificate in British Sign Language	CACDP										British Sign Language	All

Table A1.5 NVQ Level 3 (Continued)

Level	Qualification	Awarding Body	Ch	Fr	Ge	Gr	It	Ja	Ru	Sp	Ur	Other languages	Approved age range
3	Level 3 Award in Language Skills	NOCN	Yes	Arabic, Czech, Danish, Dutch, Gujarati, Irish, Panjabi, Polish, Portuguese, Swedish, Turkish	16-18, 18+, 19+								
3	Level 3 Certificate in Language Skills	NOCN	Yes	Arabic, Czech, Danish, Dutch, Gujarati, Irish, Panjabi, Polish, Portuguese, Swedish, Turkish	16-18, 18+, 19+								
3	Level 3 Certificate in Business Language Competence	OCR		Yes	Yes		Yes			Yes			All
3	NVQ in British Sign Language	CACDP										British Sign Language, Irish Sign Language	16-18, 18+, 19+
3	NVQ Language Units	City & Guilds		Yes	Yes		Yes			Yes			All
3	NVQ Language Units	EDEXCEL	Yes	Yes	Yes		Yes			Yes		Arabic	All
3	NVQ Language Units	OCR		Yes	Yes		Yes			Yes		Irish	16-18, 18+, 19+
3	Certificate in Bilingual Skills	IOLET	Yes	Albanian, Amharic, Arabic (MSA or with Maghreb Oral), Bengali (& Bengali/Sylheti), Bulgarian, Cantonese, Croatian, Czech, Dari, Dutch, Estonian, Gujarati, Hindi, Hungarian, Kiswahili, Kurdish (Sorani), Latvian, Lithuanian, Mirpuri/Urdu, Panjabi (& Panjabi/Urdu), Pashto, Polish, Portuguese (European or Brazilian), Romanian, Serbian, Slovak, Slovene, Somali, Tamil, Thai, Turkish, Vietnamese	18+, 19+								

Table A1.6 NVQ Levels 4 – 7

Level	Qualification	Awarding Body	Ch	Fr	Ge	Gr	It	Ja	Ru	Sp	Ur	Other languages	Approved age range
4	NVQ in British Sign Language(Original NQF Level)	CACDP										British Sign Language	16-18, 18+, 19+
4	NVQ Language Units (Original NQF Level)	OCR		Yes	Yes		Yes			Yes		Irish	16-18, 18+, 19+
6	Level 6 Diploma in Public Service Interpreting (Current NQF Level)	IOLET	Yes	Albanian, Amharic, Arabic (MSA or with Maghreb Oral), Armenian, Bengali (& Bengali/Sylheti), Bulgarian, Cantonese, Croatian, Czech, Dari, Dutch, Estonian, Gujarati, Hindi, Hungarian, Kiswahili, Kurdish (Sorani), Latvian, Lithuanian, Macedonian, Mirpuri/Urdu, Panjabi (& Panjabi/Urdu), Pashto, Persian, Polish, Portuguese (European or Brazilian), Romanian, Serbian, Slovak, Slovene, Somali, Tamil, Thai, Turkish, Vietnamese	19+								
7	Level 7 Diploma in Translation (Current NQF Level)	IOLET	Yes	Papers set in a wide range of languages into & out of English. Also available between any 2 of French, German, Italian & Spanish, subject to demand & availability of markers	19+								

Non-accredited provision

The European Language Portfolio Adult Version, for personal and work-related language learning is also used in vocational and adult language training. It is mapped to “the Common European Framework of Reference for languages: learning, teaching, assessment” and the Languages Ladder. It consists of a Passport, a Language Biography and a Dossier containing materials which document and illustrate experiences and achievements. It is used to cover non-accredited provision which is regulated by the requirements of RARPA¹⁰⁰, a requirement under the government Common Inspection Framework for non-accredited learning.

It can be used for all languages and maps achievement from entry level to postgraduate level.

¹⁰⁰ Recognition and Recording of Progress and Achievement. Implemented from September 2005 across all LSC funded provision.

Appendix Two: Undergraduate language courses (specified in degree title)

Institution	Subject	Available as	Award and duration	notes
SCOTLAND				
University of Aberdeen	French, German, Hispanic Studies (Spain or Latin America) Gaelic Studies	As Single, joint or major	5FT or 4FT MA (hons)	
	Modern Languages	As minor	5/4FT according to combination MA (hon)	
University of Dundee	French, German, Spanish	As minor / subsid	3/4FT MA (hons)	
University of Edinburgh	Arabic, Celtic, Chinese, French, German, Italian, Japanese, Scandinavian Studies, Spanish	Single and Joint	4/5FT MA (hons)	
	Russian, Portuguese, Czech, Polish	Joint	5FT MA (hons)	
	English Language	Joint	4FT MA (hons)	
University of Glasgow	French, German, Hispanic Studies, Italian, Russian	Single, Joint, Minor	5FT MA (hons)	
	Polish	Joint, Minor	5FT MA (hons)	
	Czech	Minor	5FT MA (hons)	
Heriot-Watt University Edinburgh	French, German, Spanish	Main, Joint, Subsid.)	4/5FT MA	Translation and Interpreting listed separately
Napier University Edinburgh	French, German, Spanish, EFL	Main	3/4FT BA (hons)	
	French, German, Italian, Spanish	Subsidiary or minor	3/4FT BA (hons)	<i>Other combinations of study time available depending on subject mix</i>
University of St. Andrews	French, German, Italian, Russian, Spanish	Single, Joint	4/5FT MA (hons)	
	Arabic, Hebrew,	Joint	4/5FT MA (hons)	
University of Strathclyde	French, German, Italian, Spanish	Joint	5FT BA (hons)	
University of the West of Scotland (formerly Paisley)	French, Spanish	Joint, Minor	3/4/5FT BA or BA (hons)	

NORTHERN IRELAND				
Queen's University Belfast	French, German, Spanish,	Major, Joint	4FT BA (hons)	
University of Ulster	French, German, Irish, Spanish	Major, Joint)	3FT BA (hons)	
WALES				
Aberystwyth University	French	Major, joint or minor	4FT BA (Hons)	
	German	Major, joint, minor	4FT BA (hons)	
	Spanish	Major/minor	4FT BA (hons)	
	Romance languages	single	4FT BA (hons)	
Bangor University	French	Single, major, joint, minor	4FT BA(hons)	
	German	Major, joint, minor	4FT BA (hons)	
	Spanish	Joint, minor	4FT BA(hons)	
	Italian	Joint, minor	4FT BA (hons)	
University of Wales Institute Cardiff	French, German, Spanish	Joint, Minor	3FT BA (hons)	Chinese, Russian available as non accredited electives
Swansea University	French, German, Italian, Spanish	Single, Joint	3/4FT BA (hons)	
ENGLAND				
Anglia Ruskin University	English as a foreign language	(single, joint, minor)	3FT BA (hons)	
Aston University	French	Single, joint , minor or as one of three languages with equal weight	4 SW/FT BSc (hons)	
	German	Single, joint , minor, or as one of three as above	4 SW/FT BSc (hons)	
	Spanish	Joint, minor or as one of three as above	4 SW/FT BSc (hons)	
University of Bath	French	Joint and with one other language and Eur Studies	4FT BA (hons)	
	German	As above	4SW BA (hons)	
	Italian	As above	4FT BA (hons)	
	Russian	As above	4SW BA (hons)	
	Spanish	As above	4FT BA(hons)	

University of Birmingham	French , German, Hispanic studies	Single, joint, minor	4FT BA (hons)	
	Russian, Portuguese, Italian, Chinese	Joint, Minor	4 FT BA (hons)	
	Japanese	minor	4FT BA (hons)	
University College Birmingham	Modern languages	as minor in Foundation degree	2FT FdA	
University of Buckingham	English as a Foreign Language	Minor	2FT BA (hons)	
	French, Spanish	Minor	2FT BA (hons)	
University of Cambridge	MML Tripos :	Major/Minor combination involving two from Dutch, French, German, Modern Greek, Italian, Portuguese, Russian, Spanish, Arabic, Persian, Hebrew	4FT BA (hons)	
	Oriental Studies:	One from Japanese, Chinese, Arabic, Hebrew	4FT BA (hons)	
Canterbury Christ Church University	French	Joint, Minor	3FT BA/BSc (hons)	
University of Central Lancashire	British Sign Language		3FT BA	
	French, German, Spanish	Major, Joint, Minor	3 or 4FT BA (hons)	
Coventry University	French	Single, Joint	4FT BA (hons)	
	Spanish	Joint	4FT BA (hons)	
Durham University	Arabic, French, German, Italian, Spanish, Russian	Major, joint, minor	4FT BA (hons)	
University of East Anglia	French	Single, joint or one third	4FT BA (hons)	
	Spanish	Single, joint or one third	4FT BA (hons)	
Edge Hill University				Language options within BEd
University of Essex	French, German, Spanish, Italian, Portuguese	as major or minor combinations together or with another subject.	4FT BA (hons)	
European Business School	One or two languages from Chinese, Japanese, French, German, Spanish, Russian, Italian studied alongside two business related subjects		3 or 4 FT BA (hons)	

University of Exeter	Arabic	Single, Joint, Minor	4FT BA (hons)	
	French, German, Italian, Russian, Spanish	Joint	4FT BA (hons)	
University of Greenwich	French	joint, minor	3FT BA (hons)	
	German	joint, minor	3FT BA (hons)	
	Italian	joint, minor	3FT BA (hons)	
	Spanish	joint, minor	3FT BA (hons)	
University of Hertfordshire	French	minor	3FT BA (hons)	
	Spanish	minor	3FT (BA hons)	
University of Huddersfield	French, German, Spanish	Minor	3FT BA (hons)	
University of Hull	French, German, Italian, Spanish	Single, Major, Joint	4FT BA (hons)	
University of Kent	French, German, Spanish (Hispanic Studies) (Single, Joint Minor	4FT BA (hons)	
	Italian	Joint, Minor	4FT BA (hons)	
King's College (University of London)	French, German, Hispanic Studies, Modern Greek	Single, joint, major	3 or 4 FT BA (hons)	
	Portuguese	joint	4FT BA (hons)	
	Portuguese and Brazilian Studies	Single, major	3 or 4FT BA (hons)	
Kingston University	French	minor	3FT BA (hons)	
	Spanish	minor	3FT BA (hons)	
University of Lancaster	French, German, Spanish	Single, Joint	4FT BA (hons)	
	Italian	Joint	4FT BA (hons)	
University of Leeds	French, German, Greek, Italian, Japanese, Russian, Spanish, Thai	Single, Joint	4/5FT BA (hons)	
	Chinese, Portuguese	Joint	4FT BA (hons)	
Leeds Metropolitan University	French, German, Spanish	Joint	3FT/4SW BA (hons)	
University of Leicester	French, Italian, Spanish	Major, joint, minor	4FT (BA (hons)	
	German	Joint, minor	4FT BA (hons)	
	Modern Languages		3FT BA (hons)	NB the "Modern Languages degree" has two joint and one minor language and can be studied over 3

University of Liverpool	French, German, Hispanic Studies	Single, joint	3 or 4FT BA (hons)	
Liverpool John Moores	French, Spanish, Chinese, Japanese	Joint-only with another language	4FT BA (hons)	
University College London	Bulgarian, Czech, Danish, Dutch, Finnish, French, German, Hebrew, Hungarian, Italian, Norwegian, Polish, Romanian, Russian, Serbian/Croatian, Slovak, Spanish, Swedish, Ukrainian, Yiddish	all available as main, joint or minor subjects.	4FT BA (hons)	
London Metropolitan University	Spanish and Latin American Studies	Single, joint	3FT BA (hons)	
University of Manchester	Arabic, French, German, Hebrew, Italian, Persian, Russian, Spanish (and Latin American Studies), Turkish	Single, joint	4FT BA (hons)	
	Chinese, Japanese	Joint	4FT BA (hons)	
Manchester Metropolitan University	English as a Foreign Language	Joint	3FT BA (hons)	
	French	Single	4FT BA (hons)	
	French, German, Spanish, Italian,	Joint, minor	3 or 4 FT BA (hons)	
Middlesex University	French	Single, major, joint	3 or 4FT BA (hons)	
	German, Spanish, Italian	Major, joint	4FT BA (hons)	
Newcastle University	French, German	Single, Joint	4FT BA (hons)	
	Chinese, Japanese, Spanish	joint	4FT BA (hons)	
University of Northampton	French	joint	3FT BA (hons)	
	German	joint	3FT BA (hons)	
University of Nottingham	French	Single, joint, major, minor	4FT BA (hons)	
	German	Single, joint, minor	4FT BA (hons)	
	Hispanic studies	Single, Joint, minor	4FT BA (hons)	
	Russian	Single, Joint, minor	4FT BA (hons)	
	Serbian and Croatian	as part of Serbian and Croatian Studies	4FT BA (hons)	
	Portuguese (beginners)	joint or minor	4FT BA (hons)	
Nottingham Trent University	French	joint, minor	4SW/FT BA (hons)	
	German	joint, minor	4 SW/FT BA (hons)	
	Spanish	joint, minor	4 SW/FT BA (hons)	

	Italian	joint, minor	4 SW/FT BA (hons)	
	Japanese, German, Italian	available as minor (non-accelerated options)		
Oxford University	Arabic, Chinese, Hebrew, Japanese, Turkish, Persian	Single/Major	4FT BA (hons)	
	French, German, Modern Greek, Italian, Portuguese, Russian, Spanish	Single, Joint, Minor	3/4FT BA (hons)	
	Czech, Celtic, Russian (beginners)	minor		
Oxford Brookes University	French, Japanese	Major, Joint, Minor	4SW BA/BSc (hons)	
	Spanish	Minor	4SW BA/BSc (hons)	
University of Plymouth	French, German, Spanish	Joint, Minor	3/4FT BA (hons)	
University of Portsmouth	French, German, Spanish	Single, Joint	4FT BA (hons)	
Queen Mary (University of London)	French	Single, major, joint	4FT BA (hons)	
	German	Single, major, joint	4FT BA (hons)	
	Hispanic Studies	Single, major, joint	4FT BA (hons)	
	Russian	Single, major, joint	4FT BA (hons)	
University of Reading	French, Italian	Single, Joint, Minor	4FT BA (hons)	
	German	Joint, Minor	4FT BA (hons)	
Roehampton University	Spanish	Joint	4FT BA (hons)	
	French	joint	4FT BA (hons)	subject to approval of the modern languages degree
Royal Holloway, University of London	French, German, Italian, Spanish	Single, Joint, Minor	4FT BA (hons)	
University of Salford	Arabic, Chinese, French, German, Italian, Portuguese, Spanish	Joint or as one third of programme	4FT BA (hons)	Translation and interpreting courses listed separately
School of Oriental and African Studies	African, Arabic, Chinese, Indonesian, Japanese, Korean, Persian, Turkish, Thai	single, joint	4FT BA (hons)	can be studied jointly with other subjects
	Georgian, Burmese, Hebrew, Hausa, Hindi, Swahili, Vietnamese, Nepali, Tibetan.	available as joint subjects	3 or 4FT BA (hons)	
University of Sheffield	Chinese	single	4FT BA (hons)	
	Korean	Single, major	4FT BA (hons)	
	French, German, Hispanic, Japanese	Single, Joint	4FT BA (hons)	

	Russian	Single, Joint, Major	4FT BA (hons)	
	Czech, Polish	Minor	4FT BA (hons)	
Sheffield Hallam University	French, German, Spanish	Major, Minor	4SW BA (hons)	
	Chinese	minor	4SW BA (hons)	
University of Southampton	French, German, Spanish (and Latin American Studies)	Single, Joint	4FT BA (hons)	
	Portuguese	Joint	4FT BA (hons)	
Southampton Solent University	Chinese French, German, Italian, Spanish and EFL are available within the Language Foundation Year but are not continued into the degree programme.	Not specified	Not specified	
University of Sunderland	French, German, Spanish	Joint and minor	3FT BA (hons)	
University of Surrey	French, German, Spanish	Main, Joint, Minor	4SW BA (hons)	
	Russian	Minor	4SW BA (hons)	
University of Sussex	French, German, Italian, Spanish	Single, Joint, Minor	4FT BA (hons)	
University of Warwick	French, German, Italian	Single, Major, Joint, Minor	4FT BA (hons)	
University of Westminster	Arabic, French, Chinese, German, Spanish, Russian	all available as joint subjects	3FT or 4SW BA (hons)	
University of West of England	French, Spanish	Joint	4FT BA (hons)	
University of Wolverhampton	EFL	Joint	3FT BA (hons)	
	French, German, Spanish	Joint	3FT BA (hons)	
University of York	French, German, Spanish	Joint	4FT BA (hons)	

Appendix Three: Taught Postgraduate Courses: Excluding Interpreting and Translation and Intercultural studies.

INSTITUTION	COURSE	AWARD
SCOTLAND		
University of Glasgow	Russian, Russian and East European Studies	MSc, PGDip
	Czech Language	PGDip.
University of St.Andrews	Advanced Language studies: French, German, Spanish, Russian	MLitt, PGDip
NORTHERN IRELAND		
Queen's University Belfast	French, German, Spanish, Portuguese Studies	MA, PGDip
University of Ulster	Modern French Studies	MA, PGDip
WALES		
Swansea University	French, German, Hispanic Studies	MA
ENGLAND		
Aston University	German Cultural Studies or French Cultural Studies	MA
Birkbeck	Modern French, German or Spanish Studies	MA
University of Birmingham	Italian Studies: Culture and Communication	MA
	Russian and East European Studies	MA/MSc
Bristol University	French, Portuguese or Russian Studies	MA
University of Exeter	European Languages and Cultures: German	MA
Inst. Of Germanic and Romance Studies (Univ. of London)	French, German, Italian	MA
University of Kent	Modern French or Hispanic Studies	MA
King's College, University of London	Spanish and Latin American Studies	MA
	Portuguese Studies	MA, PGDip, PGCert
University of Liverpool	French, German, Latin American, Hispanic Studies	MA
University College London	French, German, Hispanic, Italian, Russian Studies	MA
University of Manchester	French, German, Italian, Russian Studies	MA
University of Northumbria	Contemporary French or Hispanic studies	MA, PGDip
University of Nottingham	Modern and contemporary German or Russian and East European Studies	MA
Oxford Brookes University	French Studies	MA, PGDip, PDCert
Queen Mary College, University of London	German, Russian, Hispanic Studies	MA
University of Reading	Italian Studies	MA
University of Salford	Contemporary Italian Studies	MA, PGDip
University of Sheffield	Germanic, Hispanic Studies	MA
University of Warwick	French Culture and Thought	MA
	Italian Studies: Culture and Communication	MA
University of Westminster	French and Francophone Studies	MA. PGDip

NB:

Courses clearly indicating emphasis on Literary or Cultural rather than language and socio-political studies have been excluded, but titles are not a good guide to content and there may be anomalies either way

Appendix Four: Intercultural Communication Courses:

Postgraduate (Named)

INSTITUTION	COURSE	AWARD	
Anglia Ruskin University	Intercultural Communication in Europe	1FT or 2PT plus diss. MA	
University of Bedfordshire	Intercultural Communication	1FT MA	
University of Essex	Applied Linguistics and Intercultural Communication	1FT MA	
University of Central Lancashire	Intercultural Business Communication	1FT MA	
Newcastle University	Cross-Cultural Communication and Applied Linguistics.	1FT 2PT MA	Can be taken with Education, International Marketing, International Management (includes managing across cultures), International Relations, Media Studies.
University of Surrey	Intercultural Communication with International Business	1FT, 2PT MA also PGDip	
	Organisational Communication and Behaviour	1FT MA also PGDip	NB Not formally named but course is aimed at improving company effectiveness by optimising intercultural communication processes

Postgraduate with modules in Intercultural Communication

Anglia Ruskin University	Communication, Media and Culture	1FT, 2PT MA.	
Oxford Brookes University	European Business, Culture and Languages:	1FT/ MA PG Dip PGCert Or PT	Module in intercultural communication is compulsory for Cert (3 mods) Dip(5 mods) and MA (7 mods)
University of Warwick	Translation, Media and Cultural Transfer	1FT, 2PT also PGDip	
University of Westminster	Diplomacy and Applied Languages	1FT, 2PT MA	
	International Communication	1FT, 2PT MA, also Grad. Dip and Grad Cert.	
University of Swansea	Global Politics and Intercultural Studies	1FT MA	
University of West of England	Intercultural Communication	1FT MA	

Intercultural Communication Courses: Undergraduate (Named)

University of West of England	Intercultural Communication with: Law, Marketing, Management, Linguistics, Chinese Studies, European Studies, or Spanish	3 FT BA joint hons	
University of Stirling	International Management and Intercultural Studies	5 FT MA Joint hons	

Undergraduate with modules in intercultural communication

Nottingham Trent University	Communication and Society: With French, Spanish, English, History, International Relations, Linguistics, Marketing and Design, Fashion, Media, Philosophy.	3 FT BA Joint hons	Can be major or minor within most combinations
Anglia Ruskin University	Communication Studies	3FT or 5PT BA Hons	Contains small amount of intercultural
Canterbury Christ Church University	Communication Studies	3YR FT BA Hons	IC1 is comp. mod. Yr 2. IC2 is opt mod YR 3, IC Training is Opt mod yr 3.
	English Language and Communication	3YR FT BA Comb Hons	IC1 and IC2 are comp. mods yrs 2 and 3. IC Training is opt mod yr 3

Appendix Five: Proportion of all pupils taking at least one language GCSE, 2002-3 to 2005-6, by Local Authority and English Region

Table A5.1: Proportion of all pupils taking at least one language GCSE, 2002-3 to 2005-6, by Local Authority; North East Region (*Maintained schools only*)

Local authority	2002/03	2003/04	2004/006	2005/06
North Tyneside	77%	72%	52%	48%
Stockton on Tees	66%	61%	49%	46%
Gateshead	60%	60%	49%	46%
Northumberland	75%	73%	55%	43%
Darlington	79%	67%	51%	42%
Sunderland	84%	76%	59%	40%
Durham	65%	63%	48%	40%
Newcastle upon Tyne	65%	55%	46%	35%
Hartlepool	64%	55%	43%	32%
Redcar and Cleveland	53%	53%	37%	31%
South Tyneside	71%	60%	38%	28%
Middlesbrough	56%	43%	30%	24%
North East	69%	63%	48%	39%
England	73%	67%	57%	48%

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2. Data notes

The data comes from the Department for Children, Schools and Families (DCSF) statistical releases of exam entry data, released in January of the year after the exams. The latest release, in January 2007, was for 2005-6 data, *GCSE and Equivalent Examination Results in England 2005/06 (Revised)*, which can be downloaded at <http://www.dcsf.gov.uk/rsgateway/DB/SFR/s000702/index.shtml>

The percentage for 2002-3 and 2003-4 is based on all 15-year old pupils in maintained and independent schools in England. In 2005, the DfES changed their reporting to all pupils at the end of KS4. Hence data from 2005 uses this population base. This refers to pupils who have reached the end of Key Stage 4 (i.e. when they have completed Year 11). The large majority of pupils at the end of Key Stage 4, however are aged 15, hence this doesn't greatly affect comparisons across years.

Table A5.2: Proportion of all pupils taking at least one language GCSE, 2002-3 to 2005-6, by Local Authority; North West Region (*Maintained schools only*)

Local authority	2002/03	2003/04	2004/006	2005/06
Trafford	80%	75%	62%	62%
Bury	88%	82%	71%	59%
Sefton	74%	70%	62%	56%
Stockport	81%	76%	66%	55%
Warrington	76%	71%	58%	52%
Lancashire	81%	73%	62%	52%
Cheshire	79%	75%	63%	52%
Blackburn with Darwen	79%	73%	59%	48%
Wigan	74%	73%	67%	48%
Wirral	72%	65%	64%	47%
Blackpool	54%	53%	43%	46%
Cumbria	78%	76%	59%	44%
Bolton	86%	76%	73%	44%
Tameside	69%	61%	53%	43%
St Helens	76%	70%	58%	42%
Liverpool	63%	59%	52%	40%
Oldham	81%	74%	55%	37%
Rochdale	75%	66%	44%	34%
Knowsley	53%	39%	31%	30%
Manchester	54%	44%	29%	29%
Salford	53%	46%	33%	27%
Halton	68%	64%	36%	27%
North West	74%	68%	57%	46%
England	73%	67%	57%	48%

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Table A5.3: Proportion of all pupils taking at least one language GCSE, 2002-3 to 2005-6, by Local Authority; Yorkshire and Humberside Region (*Maintained schools only*)

Local authority	2002/03	2003/04	2004/006	2005/06
York, City of	79%	79%	70%	64%
Calderdale	72%	68%	60%	56%
East Riding of Yorkshire	84%	81%	68%	54%
North Yorkshire	81%	79%	68%	50%
Kirklees	79%	72%	51%	45%
Wakefield	80%	67%	57%	45%
Leeds	76%	69%	57%	44%
North Lincolnshire	73%	71%	56%	44%
Sheffield	76%	66%	52%	39%
Bradford	71%	65%	49%	39%
Rotherham	70%	67%	51%	33%
Kingston upon Hull, City of	61%	56%	45%	33%
North East Lincolnshire	79%	67%	51%	33%
Barnsley	68%	53%	40%	32%
Doncaster	76%	71%	49%	30%
Yorkshire and Humberside	76%	69%	56%	43%
England	73%	67%	57%	48%

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Table A5.4: Proportion of all pupils taking at least one language GCSE, 2002-3 to 2005-6, by Local Authority; East Midlands Region (*Maintained schools only*)

Local authority	2002/03	2003/04	2004/006	2005/06
Rutland	88%	78%	77%	72%
Leicestershire	77%	74%	67%	57%
Northamptonshire	73%	71%	65%	55%
Lincolnshire	75%	68%	59%	52%
Derby City	72%	64%	55%	51%
Nottinghamshire	80%	74%	57%	49%
Leicester City	60%	56%	49%	45%
Derbyshire	66%	64%	53%	43%
Nottingham, City of	54%	38%	32%	34%
East Midlands	72%	67%	58%	50%
England	73%	67%	57%	48%

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Table A5.5: Proportion of all pupils taking at least one language GCSE, 2002-3 to 2005-6, by Local Authority; West Midlands Region (*Maintained schools only*)

Local authority	2002/03	2003/04	2004/006	2005/06
Worcestershire	78%	77%	69%	57%
Shropshire	77%	71%	64%	53%
Herefordshire	79%	73%	59%	52%
Dudley	73%	68%	59%	50%
Solihull	70%	62%	53%	49%
Warwickshire	68%	62%	52%	48%
Telford and Wrekin	70%	63%	56%	48%
Staffordshire	71%	67%	60%	48%
Coventry	60%	56%	52%	44%
Birmingham	63%	57%	49%	43%
Wolverhampton	61%	47%	41%	42%
Walsall	64%	57%	49%	37%
Sandwell	55%	40%	34%	28%
Stoke on Trent	42%	41%	32%	26%
West Midlands	67%	61%	53%	45%
England	73%	67%	57%	48%

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Table A5.6: Proportion of all pupils taking at least one language GCSE, 2002-3 to 2005-6, by Local Authority; East of England Region (*Maintained schools only*)

Local authority	2002/03	2003/04	2004/006	2005/06
Cambridgeshire	78%	77%	67%	58%
Hertfordshire	76%	74%	64%	55%
Peterborough, City of	76%	74%	55%	54%
Suffolk	75%	69%	60%	48%
Norfolk	73%	66%	58%	48%
Essex	68%	61%	54%	46%
Southend	60%	56%	54%	44%
Bedfordshire	71%	66%	52%	43%
Thurrock	67%	50%	49%	39%
Luton	73%	65%	51%	39%
East of England	72%	67%	58%	49%
England	73%	67%	57%	48%

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Table A5.7: Proportion of all pupils taking at least one language GCSE, 2002-3 to 2005-6, by Local Authority; London Region (*Maintained schools only*)

Local authority	2002/03	2003/04	2004/006	2005/06
Inner London				
Kensington and Chelsea	81%	80%	77%	71%
Newham	70%	65%	64%	58%
Camden	77%	76%	70%	57%
Hammersmith and Fulham	67%	60%	57%	55%
Westminster, City of	62%	62%	51%	54%
Wandsworth	64%	59%	55%	53%
Hackney	62%	57%	51%	51%
Lambeth	67%	62%	56%	50%
Haringey	56%	53%	48%	43%
Tower Hamlets	66%	57%	52%	43%
Lewisham	77%	63%	51%	40%
Southwark	56%	52%	39%	38%
Islington	73%	56%	44%	38%
Outer London				
Sutton	81%	76%	71%	67%
Havering	79%	81%	68%	66%
Harrow	82%	76%	68%	66%
Hounslow	77%	76%	71%	65%
Barnet	81%	77%	68%	61%
Kingston upon Thames	68%	66%	65%	61%
Croydon	75%	71%	66%	61%
Enfield	68%	64%	57%	57%
Redbridge	75%	76%	61%	55%
Richmond upon Thames	83%	72%	63%	55%
Ealing	77%	74%	67%	54%
Bromley	78%	72%	57%	54%
Brent	74%	65%	55%	50%
Waltham Forest	69%	68%	59%	47%
Bexley	72%	68%	54%	42%
Hillingdon	61%	61%	52%	41%
Merton	58%	52%	47%	40%
Greenwich	60%	44%	40%	33%
Barking and Dagenham	36%	28%	27%	25%
London	71%	66%	58%	52%
England	73%	67%	57%	48%

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Table A5.8: Proportion of all pupils taking at least one language GCSE, 2002-3 to 2005-6, by Local Authority; South East Region (*Maintained schools only*)

Local authority	2002/03	2003/04	2004/006	2005/06
Slough	81%	77%	72%	66%
West Berkshire	83%	79%	72%	64%
Oxfordshire	79%	78%	72%	63%
Wokingham	84%	82%	75%	59%
Windsor and Maidenhead	76%	79%	72%	58%
Buckinghamshire	77%	76%	66%	58%
Surrey	80%	75%	66%	58%
West Sussex	76%	73%	66%	58%
Milton Keynes	77%	75%	69%	57%
Hampshire	79%	74%	62%	54%
Bracknell Forest	70%	80%	63%	51%
Kent	73%	69%	59%	50%
Medway	71%	71%	56%	47%
Brighton and Hove	71%	66%	58%	47%
East Sussex	68%	58%	51%	46%
Isle of Wight	63%	57%	51%	45%
Reading	62%	66%	48%	45%
Portsmouth	61%	57%	51%	44%
Southampton	59%	45%	39%	32%
South East	75%	71%	62%	54%
England	73%	67%	57%	48%

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Table A5.9: Proportion of all pupils taking at least one language GCSE, 2002-3 to 2005-6, by Local Authority; South West Region (*Maintained schools only*)

Local authority	2002/03	2003/04	2004/006	2005/06
South Gloucestershire	76%	78%	74%	63%
Dorset	83%	78%	73%	62%
Poole	80%	79%	69%	60%
Plymouth, City of	78%	75%	66%	59%
Wiltshire	80%	75%	68%	57%
Bath and North East Somerset	81%	78%	71%	55%
Gloucestershire	78%	75%	65%	55%
North Somerset	69%	63%	58%	50%
Torbay	84%	81%	63%	49%
Cornwall	74%	69%	58%	48%
Bournemouth	60%	50%	47%	46%
Devon	75%	70%	54%	46%
Bristol, City of	63%	52%	46%	40%
Somerset	75%	68%	60%	36%
Swindon	67%	60%	51%	35%
Isles of Scilly	94%	82%	87%	30%
South West	75%	70%	61%	50%
England	73%	67%	57%	48%

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Appendix Six: GCSE attempts in languages by pupils at the end of KS4 in maintained schools by end of 2005-6 by Local Authority and English region

Table A6.1: GCSE attempts in languages by pupils at the end of KS4 in maintained schools by end of 2005-6 by Local Authority; North East (Maintained schools only)

Local authority	% of all KS4 pupils attempting a language ***	% of all KS4 pupils studying French	% of all KS4 pupils studying German	% of all KS4 pupils studying Spanish	% of all KS4 pupils studying Italian and Other Modern Languages
Hartlepool	32%	20%	14%	1%	0%
Middlesbrough	24%	17%	5%	3%	1%
Redcar and Cleveland	31%	19%	8%	5%	0%
Stockton-on-Tees	46%	24%	23%	1%	1%
Darlington	42%	25%	13%	7%	1%
Durham	40%	26%	13%	4%	0%
Northumberland	43%	32%	11%	6%	1%
Gateshead	46%	32%	12%	9%	2%
Newcastle upon Tyne	35%	23%	6%	11%	5%
North Tyneside	48%	31%	11%	8%	0%
South Tyneside	28%	23%	2%	2%	1%
Sunderland	40%	27%	5%	8%	1%
North East	39%	26%	10%	6%	1%
England	48%	30%	13%	7%	3%

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Notes: The data comes from the Department for Children, Schools and Families (DCSF) statistical release of exam entry data, in January 2007, *GCSE and Equivalent Examination Results in England 2005/06 (Revised)*, which can be downloaded at <http://www.dcsf.gov.uk/rsgateway/DB/SFR/s000702/index.shtml>

Table A6.2: GCSE attempts in languages by pupils at the end of KS4 in maintained schools by end of 2005-6 by Local Authority; North West (Maintained schools only)

Local authority	% of all KS4 pupils attempting a language ***	% of all KS4 pupils studying French	% of all KS4 pupils studying German	% of all KS4 pupils studying Spanish	% of all KS4 pupils studying Italian and Other Modern Languages
Halton	27%	18%	9%	5%	0%
Warrington	52%	31%	21%	4%	0%
Cheshire	52%	30%	17%	8%	0%
Cumbria	44%	27%	16%	3%	1%
Bolton	44%	22%	11%	14%	2%
Bury	59%	39%	12%	9%	4%
Manchester	29%	13%	5%	6%	7%
Oldham	37%	18%	9%	9%	4%
Rochdale	34%	19%	5%	7%	8%
Salford	27%	19%	6%	4%	2%
Stockport	55%	27%	25%	8%	1%
Tameside	43%	23%	14%	6%	3%
Trafford	62%	43%	9%	16%	2%
Wigan	48%	37%	12%	5%	0%
Blackburn with Darwen	48%	25%	11%	7%	7%
Blackpool	46%	35%	15%	4%	0%
Lancashire	52%	35%	16%	5%	1%
Knowsley	30%	23%	4%	7%	0%
Liverpool	40%	24%	4%	14%	1%
St. Helens	42%	28%	8%	10%	2%
Sefton	56%	28%	4%	31%	0%
Wirral	47%	23%	12%	15%	1%
North West	46%	28%	12%	9%	2%
England	48%	30%	13%	7%	3%

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Table A6.3: GCSE attempts in languages by pupils at the end of KS4 in maintained schools by end of 2005-6 by Local Authority; Yorkshire and Humberside (*Maintained schools only*)

Local authority	% of all KS4 pupils attempting a language ***	% of all KS4 pupils studying French	% of all KS4 pupils studying German	% of all KS4 pupils studying Spanish	% of all KS4 pupils studying Italian and Other Modern Languages
East Riding of Yorkshire	79%	79%	70%	64%	79%
Kingston upon Hull, City of	72%	68%	60%	56%	72%
North East Lincolnshire	84%	81%	68%	54%	84%
North Lincolnshire	81%	79%	68%	50%	81%
York	79%	72%	51%	45%	79%
North Yorkshire	80%	67%	57%	45%	80%
Barnsley	76%	69%	57%	44%	76%
Doncaster	73%	71%	56%	44%	73%
Rotherham	76%	66%	52%	39%	76%
Sheffield	71%	65%	49%	39%	71%
Bradford	70%	67%	51%	33%	70%
Calderdale	61%	56%	45%	33%	61%
Kirklees	79%	67%	51%	33%	79%
Leeds	68%	53%	40%	32%	68%
Wakefield	76%	71%	49%	30%	76%
Yorkshire and Humberside	76%	69%	56%	43%	76%
England	48%	30%	13%	7%	3%

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Table A6.4: GCSE attempts in languages by pupils at the end of KS4 in maintained schools by end of 2005-6 by Local Authority; East Midlands (Maintained schools only)

Local authority	% of all KS4 pupils attempting a language ***	% of all KS4 pupils studying French	% of all KS4 pupils studying German	% of all KS4 pupils studying Spanish	% of all KS4 pupils studying Italian and Other Modern Languages
Derby	51%	31%	13%	4%	7%
Derbyshire	43%	23%	15%	6%	0%
Leicester	45%	32%	5%	4%	10%
Rutland	72%	52%	31%	1%	0%
Leicestershire	57%	50%	6%	3%	1%
Lincolnshire	52%	34%	19%	5%	1%
Northamptonshire	55%	40%	15%	5%	1%
Nottingham	34%	20%	9%	4%	4%
Nottinghamshire	49%	33%	16%	3%	1%
East Midlands	50%	34%	14%	4%	2%
England	48%	30%	13%	7%	3%

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Table A6.5: GCSE attempts in languages by pupils at the end of KS4 in maintained schools by end of 2005-6 by Local Authority; West Midlands (Maintained schools only)

Local authority	% of all KS4 pupils attempting a language ***	% of all KS4 pupils studying French	% of all KS4 pupils studying German	% of all KS4 pupils studying Spanish	% of all KS4 pupils studying Italian and Other Modern Languages
Herefordshire	52%	37%	12%	6%	0%
Worcestershire	57%	40%	18%	4%	0%
Telford and Wrekin	48%	32%	18%	4%	0%
Shropshire	53%	38%	14%	3%	1%
Stoke-on-Trent	26%	20%	3%	4%	2%
Staffordshire	48%	30%	18%	2%	1%
Warwickshire	48%	31%	14%	6%	1%
Birmingham	43%	24%	9%	4%	9%
Coventry	44%	26%	13%	6%	3%
Dudley	50%	29%	17%	4%	2%
Sandwell	28%	16%	6%	4%	3%
Solihull	49%	25%	16%	14%	2%
Walsall	37%	28%	6%	6%	2%
Wolverhampton	42%	19%	13%	10%	7%
West Midlands	45%	28%	13%	5%	3%
England	48%	30%	13%	7%	3%

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Table A6.6: GCSE attempts in languages by pupils at the end of KS4 in maintained schools by end of 2005-6 by Local Authority; East of England (Maintained schools only)

Local authority	% of all KS4 pupils attempting a language ***	% of all KS4 pupils studying French	% of all KS4 pupils studying German	% of all KS4 pupils studying Spanish	% of all KS4 pupils studying Italian and Other Modern Languages
Luton	39%	15%	8%	8%	10%
Bedfordshire	43%	23%	11%	10%	3%
Peterborough	54%	34%	15%	4%	6%
Cambridgeshire	58%	40%	19%	2%	1%
Southend-on-Sea	44%	34%	14%	4%	1%
Thurrock	39%	30%	8%	6%	1%
Essex	46%	30%	15%	5%	1%
Hertfordshire	55%	33%	20%	7%	3%
Norfolk	48%	30%	15%	6%	1%
Suffolk	48%	33%	15%	4%	0%
East of England	49%	31%	15%	6%	2%
England	48%	30%	13%	7%	3%

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Table A6.7: GCSE attempts in languages by pupils at the end of KS4 in maintained schools by end of 2005-6 by Local Authority; Inner London (Maintained schools only)

Local authority	% of all KS4 pupils attempting a language ***	% of all KS4 pupils studying French	% of all KS4 pupils studying German	% of all KS4 pupils studying Spanish	% of all KS4 pupils studying Italian and Other Modern Languages
Inner London					
Camden	57%	30%	3%	25%	8%
Hackney	51%	28%	2%	14%	13%
Hammersmith and Fulham	55%	35%	6%	18%	8%
Haringey	43%	19%	7%	12%	12%
Islington	38%	19%	4%	8%	12%
Kensington and Chelsea	71%	53%	0%	19%	11%
Lambeth	50%	32%	1%	15%	8%
Lewisham	40%	28%	6%	5%	4%
Newham	58%	42%	6%	1%	13%
Southwark	38%	25%	2%	12%	6%
Tower Hamlets	43%	11%	1%	10%	24%
Wandsworth	53%	32%	7%	16%	5%
Westminster	54%	36%	8%	10%	14%
London	52%	31%	9%	10%	8%
England	48%	30%	13%	7%	3%

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Table A6.8: GCSE attempts in languages by pupils at the end of KS4 in maintained schools by end of 2005-6 by Local Authority; Outer London (Maintained schools only)

Local authority	% of all KS4 pupils attempting a language ***	% of all KS4 pupils studying French	% of all KS4 pupils studying German	% of all KS4 pupils studying Spanish	% of all KS4 pupils studying Italian and Other Modern Languages
Outer London					
Barking and Dagenham	25%	19%	4%	2%	2%
Barnet	61%	35%	17%	8%	12%
Bexley	42%	29%	12%	7%	3%
Brent	50%	30%	12%	7%	12%
Bromley	54%	28%	18%	13%	2%
Croydon	61%	40%	16%	7%	3%
Ealing	54%	33%	6%	11%	9%
Enfield	57%	31%	9%	12%	12%
Greenwich	33%	21%	3%	6%	5%
Harrow	66%	33%	20%	15%	7%
Havering	66%	46%	14%	7%	8%
Hillingdon	41%	24%	8%	7%	8%
Hounslow	65%	38%	15%	12%	7%
Kingston upon Thames	61%	39%	10%	14%	4%
Merton	40%	27%	8%	4%	3%
Redbridge	55%	33%	7%	12%	10%
Richmond upon Thames	55%	32%	21%	3%	5%
Sutton	67%	45%	21%	9%	1%
Waltham Forest	47%	32%	2%	6%	11%
London	52%	31%	9%	10%	8%
England	48%	30%	13%	7%	3%

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Table A6.9: GCSE attempts in languages by pupils at the end of KS4 in maintained schools by end of 2005-6 by Local Authority; South East (Maintained schools only)

Local authority	% of all KS4 pupils attempting a language ***	% of all KS4 pupils studying French	% of all KS4 pupils studying German	% of all KS4 pupils studying Spanish	% of all KS4 pupils studying Italian and Other Modern Languages
Bracknell Forest	51%	34%	19%	3%	0%
Windsor and Maidenhead	58%	42%	13%	8%	1%
West Berkshire	64%	41%	21%	4%	0%
Reading	45%	33%	15%	3%	3%
Slough	66%	39%	13%	10%	12%
Wokingham	59%	40%	19%	8%	1%
Milton Keynes	57%	42%	13%	6%	3%
Buckinghamshire	58%	38%	13%	15%	3%
Brighton and Hove	47%	27%	8%	13%	3%
East Sussex	46%	28%	14%	8%	1%
Portsmouth	44%	24%	17%	4%	1%
Southampton	32%	19%	6%	8%	2%
Hampshire	54%	35%	16%	8%	1%
Isle of Wight	45%	30%	5%	12%	4%
Medway	47%	34%	13%	6%	1%
Kent	50%	33%	13%	10%	2%
Oxfordshire	63%	38%	22%	10%	2%
Surrey	58%	34%	18%	9%	2%
West Sussex	58%	33%	18%	8%	2%
South East	54%	34%	15%	9%	2%
England	48%	30%	13%	7%	3%

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Table A6.10: GCSE attempts in languages by pupils at the end of KS4 in maintained schools by end of 2005-6 by Local Authority; South West (Maintained schools only)

Local authority	% of all KS4 pupils attempting a language ***	% of all KS4 pupils studying French	% of all KS4 pupils studying German	% of all KS4 pupils studying Spanish	% of all KS4 pupils studying Italian and Other Modern Languages
Bath and North East Somerset	55%	38%	17%	4%	1%
Bristol, City of	40%	29%	8%	3%	2%
North Somerset	50%	33%	17%	4%	0%
South Gloucestershire	63%	32%	31%	3%	3%
Cornwall	48%	34%	12%	6%	0%
Isles of Scilly	30%	30%	0%	0%	0%
Torbay	49%	34%	23%	2%	2%
Plymouth	59%	35%	14%	13%	1%
Devon	46%	32%	11%	5%	2%
Bournemouth	46%	34%	5%	9%	2%
Poole	60%	46%	9%	11%	0%
Dorset	62%	41%	14%	10%	1%
Gloucestershire	55%	35%	15%	10%	2%
Somerset	36%	23%	14%	3%	0%
Swindon	35%	25%	10%	2%	2%
Wiltshire	57%	33%	20%	7%	1%
South West	50%	33%	14%	6%	1%
England	48%	30%	13%	7%	3%

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