

LANGUAGES: THE STATE OF THE NATION

**Demand and supply of
language skills in the UK**

SUMMARY REPORT

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Key messages

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

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

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

Languages: The State of the Nation

1. **Are enough people learning languages in the UK today to meet our current and future needs? Does supply match demand when it comes to the range of languages offered in our schools and universities? How well are we equipping people with languages, alongside other crucial employment skills? Are we providing a broad enough spectrum of the population with language skills?** The *State of the Nation* report,¹ commissioned by the British Academy, seeks to establish the baseline data in order to deepen our understanding of these issues and consider how best to address them.
2. 'Strategic deficits in language learning' have already been identified in policy and research papers prepared by the British Academy² among many others. This report forms part of the Academy's language programme³ and is the first comprehensive review of the empirical data available in England, Northern Ireland, Scotland and Wales. The report looks at:
 - the policy background and health of language learning in each of the four parts of the UK
 - the demand for, and current supply of, language skills in the workplace
 - the UK's capacity to meet economic, social, cultural and intellectual needs through languages, both now and in the future.
3. It highlights language issues that the four parts of the UK have in common and, where they diverge, seeks to learn from their distinct experiences. The *State of the Nation* report, which will be updated at regular intervals, aims to monitor the situation and to provide stimulus for the development of future policy solutions.
4. The report draws on a wide range of data from government departments, employer organisations, examination boards and other national and international bodies. Two new pieces of research were also specially commissioned for this report:⁴ the

1 This report was prepared by Teresa Tinsley (Alcantara Communications) and is available, in full, on the British Academy website: www.britac.ac.uk

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

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

4 These are provided in the full report as Appendices 1 and 2.

first, *Beyond English – Britons at work in a foreign language*, draws on a survey of UK employers known to be using foreign language skills in their work, conducted in collaboration with Rosetta Stone; the second, *Labour market intelligence for languages*, explores which languages are requested by employers and which sectors recruit for language skills, and identifies job roles and other related information.

5. As well as providing an evidence base for future policy development, the report makes the case for a more strategic approach to languages across British businesses, education and governments. This will boost Britain's capacity to influence global affairs and to hold its own in the ever evolving world of employment.
6. It is addressed to policymakers, advisers and planners in government, in employer organisations, and at all levels in the education sector. Its focus is on foreign languages – understood as those that originate outside the British Isles.

Key Issues

7. The report highlights serious concerns about the fragility of language provision. The following key issues have been identified across England, Northern Ireland, Scotland and Wales:
 - a. **There is strong evidence that the UK is suffering from a growing deficit in foreign language skills at a time when global demand for language skills is expanding.** Approximately half of the demand identified as key to future economic growth is in languages which are difficult or impossible to study within the UK education system. Learning languages is rarely combined with the acquisition of other workplace skills. And language courses are seldom offered to learners with lower academic attainment.
 - b. **The range and nature of languages being taught is insufficient to meet current and future demand.** It is encouraging that at present there is clearly correlation between the languages taught and the languages most used in working contexts. However things are rapidly changing. Business and public sector organisations are already using a much wider range of languages in their operations.
 - c. **Language skills are needed at all levels in the workforce, and not simply by an internationally mobile elite.** Comparisons of recent National Employer Skills Surveys indicate that 17% (2009) and 27% (2011) of vacancies in administrative and clerical roles went unfilled due to shortages of foreign language skills.

- d. **A weak supply of language skills is pushing down demand and creating a vicious circle of monolingualism.** Case studies of organisations interviewed for this report show that, in the absence of a strong supply of language skills in the labour market, large organisations may train existing staff rather than narrowing the field at the recruitment stage by advertising for linguists. Despite these important signals of demand, employers tend to obscure these deficits in the UK workforce by hiring native speakers, or eliminating language requirements from job adverts, or focusing their business strategy solely on regions where English is the dominant language.
- e. **Developing language skills alongside others is rare.** This state of affairs is exacerbated by the fact that it is very uncommon for university students to take degrees combining languages with vocational or STEM subjects. This in turn limits the UK's ability to transfer domestic innovation or enterprise into international markets. While we are increasingly seeing new and innovative ways in which Higher Education Institutions are developing languages as core skills, there is very little policy development UK-wide that has attempted to combine language tuition with vocational or work-based skills. Wider enterprise and skills strategies have tended to give STEM subjects priority for policy development, frequently overlooking the contribution of language skills to the economy.
- f. **Languages spoken by British schoolchildren, in addition to English, represent a valuable future source of supply, if these skills can be developed appropriately.** Ethnic minority community language teaching mostly takes place in the voluntary sector. 'Asset Languages' exams were introduced in 25 languages as part of the 2002 National Languages Strategy in England to enable a more flexible alternative to GCSE accreditation – however this range of languages is now to be discontinued. A report on community languages teaching in England, Scotland and Wales showed that at least 61 of the many languages spoken were already being taught to children of school age at complementary schools or centres run by parents.⁵ This burgeoning supply of language skills must be built upon and harnessed for the benefit of the wider community. 2011 Census data shows that of the 4.2million (8%) of residents in England and Wales with a main language other than English, 3.3million (79%) could speak English very well or well. The second most reported main language was Polish (546,000 speakers), then Panjabi (273,000 speakers) and Urdu (269,000 speakers).⁶

5 CILT, SCILT and CILT Cymru, *Community Language Learning in England, Wales and Scotland*, 2005.

6 2011 Census data released 30 January 2013, available at <http://www.ons.gov.uk/ons/rel/census/2011-census/key-statistics-and-quick-statistics-for-wards-and-output-areas-in-england-and-wales/index.html>

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

NORTHERN IRELAND

HIGHER EDUCATION

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

SECONDARY EDUCATION

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

PRIMARY EDUCATION

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

ENGLAND

HIGHER EDUCATION

- 2011 Languages designated SIVS by HEFCE. Additional funding made available through the Routes into Languages Programme
- 2012–13 Intake English Students must pay tuition fees of up to £9,000 p/a. Early evidence suggests this may disincentivise taking 4-year language degrees, Erasmus or a Year Abroad⁷

SECONDARY EDUCATION

- Languages are compulsory from 11–14, although schools with Academy status are exempted from following the national curriculum
- 2004 Languages made optional post-14
- 2011 43% of the cohort took a foreign language GCSE (down from 78% in 2001)
- 2011 The English Baccalaureate requires a good pass in a modern or ancient language GCSE. Evidence suggests this is boosting uptake amongst high achieving students only⁸

PRIMARY EDUCATION

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

SCOTLAND

HIGHER EDUCATION

- Scottish students at Scottish Universities do not pay tuition fees

SECONDARY EDUCATION

- 1989–2001 'Languages for All' guidelines created 'compulsion by consensus' for foreign languages teaching⁹
- Since 2001 language learning reduced to 'entitlement only'
- 2005–11 Rapid drop from 285 to 59 Language Assistants
- 2009 The Curriculum for Excellence includes a language component within a wider strand of languages and literacy. Levels of attainment and tuition provision under this initiative remain in question¹⁰
- Since 2009 post-16 Scottish Languages Baccalaureate requires at least one Advanced Higher level modern or classical language

PRIMARY EDUCATION

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

WALES

HIGHER EDUCATION

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

SECONDARY EDUCATION

- Foreign languages have never been compulsory post-14
- Numbers taking languages post-14 have always been lower than the UK average, but have been dropping over recent years. A contributing factor might be the introduction in recent years of 14–19 Learning Pathways which brought greater curriculum choice¹¹
- 2010 'Making Languages Count'¹² supported the development of alternative language qualifications to GCSE level, business-education links involving languages and a language component within the new Welsh Baccalaureate

PRIMARY EDUCATION

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

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

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

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

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

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

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

- g. **The spread of language learning within and between the four UK territories is uneven.** While it is possible to study for language degrees in 49 languages in the UK as a whole, Northern Irish universities offer courses in only five different languages. Within England, A-level language entries varied greatly across different regions, ranging from over 4,000 in London to around 500 in the North East in 2011. At primary school level, language tuition has been made compulsory in Scotland, while in Wales similar schemes are only at the pilot stage.
- h. **Where language learning is not compulsory, low levels of uptake are a cause for concern.** This is evident in England, for example, where the proportion of students sitting GCSEs in a foreign language fell from 78% in 2001 to just 43% in 2011 in the wake of the decision, in 2004, to make languages optional. In Wales, foreign languages have never been compulsory in secondary schools and uptake of language GCSEs is the lowest in the UK, representing just 3% of all GCSE subject entries.
- i. **Engagement with languages across gender and socio-economic groups is unbalanced.** Studying a language to GCSE is more associated with advantage than not studying a language is with disadvantage. Nearly a third of linguists in Higher Education come from independent schools (while only 18% of the post 16 school population attend these schools), and in state schools just 14% of children eligible for free school meals obtained a good GCSE in a foreign language compared to 31% of other state school pupils.
- j. **Recent fee increases, immigration policy changes and bad publicity relating to the handling of international students at certain Higher Education institutions may be offputting to international students.** This is forecast to have a disproportionate effect on the viability of Language Centres and postgraduate programmes requiring language proficiency as international students have been over-represented in these programmes.¹³

Policy Context

8. Policymakers across the UK share ambitions to create a better-educated workforce, providing more employment opportunities for young people and securing international trade, exports and foreign investment. Yet the CBI has

¹³ Nick Byrne, 'How University Language Centres Are Offering Integrated and Non-integrated Language Modules', *Association of University Language Centres*, 2009, www.aulc.org/meetings/01-2009/limerick_2009.html [accessed 1 January 2013]. See also John Canning, *Survey of Non-specialist Language Learners*, 2011 [www.ucml.ac.uk/sites/default/files/Survey of non-specialist language learners 2011.pdf](http://www.ucml.ac.uk/sites/default/files/Survey%20of%20non-specialist%20language%20learners%202011.pdf). Ruth Levitt and others, *Language Matters. The Supply of and Demand for UK Born and Educated Academic Researchers with Skills in Languages Other Than English*, 2009.

Case Study: New Era Aquaculture

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

put on record that the UK is held back globally by its reputation for poor foreign language skills.¹⁴

9. The policy contexts in which these challenges are being met vary enormously across the UK, as illustrated in Figure 1. Concerns however, about the fragility of language provision and the difficulties of engaging learners, employers, course providers and government, are common throughout the UK.
10. By and large recent policy development in the different education systems has targeted language provision in primary schools and lower secondary schools. The Scottish Languages Baccalaureate is the exception, requiring post-16 pupils to continue with languages. Whilst language learning has increased at earlier stages, removing the compulsion to take languages at GCSE level has precipitated a drop in the study of languages from age 14 onwards. The uptake of foreign languages at A-level and Highers has remained stable at lower than desired levels, ranging from 5% of all subject entries in Northern Ireland, down to 3% in Wales in 2012.¹⁵ Within higher education, early evidence appears to show that the increasing fees for English students and English universities is also having an adverse effect on admissions to four-year language degrees, the Erasmus programme and Year Abroad schemes. Students seem to be deciding that the extra year spent learning a language abroad is simply too costly.¹⁶

¹⁴ CBI/Ernst and Young.

¹⁵ JCQ, Results 2012 - Provisional GCE A-level Results June 2012, 2012. Scottish Qualifications Authority, 'National Course Results Statistics 2012 (Pre-appeals)', 2012.

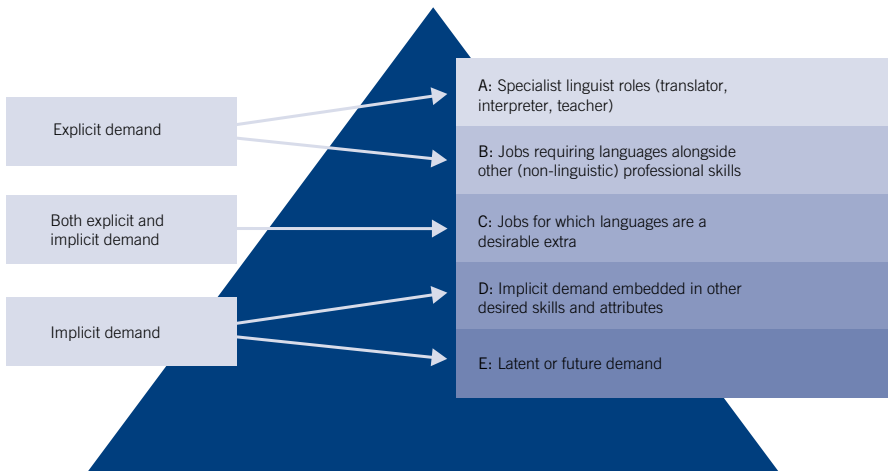
¹⁶ See British Academy-UCML Position Statement, Valuing the Year Abroad, 2012.

Demand

Which levels of language proficiency are required?

11. The 2012 CBI Employer survey, based on responses from 542 companies, found that nearly three quarters of UK private sector employers see a need for – or at least a benefit in having – foreign language skills in their business.¹⁷
12. An overarching review of evidence identified five different levels of demand for language skills:

Figure 2: The structure of the jobs market for languages



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

¹⁷ CBI/Pearson, 'Learning to Grow: What Employers Need from Education and Skills', 2012.

CBI/EDI, Building for Growth: Business Priorities for Education and Skills, 2011.

CBI/EDI, Ready to Grow: Business Priorities for Education and Skills, 2010.

CBI, Emerging Stronger: the Value of Education and Skills in Turbulent Times. Education and Skills Survey, 2009.

14. The greatest proportion of jobs for which language skills are a must is spread throughout many occupational sectors – typically in combination with other workplace skills (B). Labour Market Intelligence conducted in preparation for this report identified ‘accounts’, ‘marketing or PR’ and ‘sales’ (amongst others) as terms commonly used in advertisements for jobs with languages.¹⁸ Jobs are regularly advertised for which languages are noted as desirable but not essential (C). The 2012 CBI/Pearson Education and Skills Survey found that only 28% of responding employers said they had no need for language skills at all, although few are explicit about this at the point of recruitment. Level C therefore includes both explicit and implicit demand for languages.
15. Employers value not only language skills per se, but the inherent skills and attributes – in particular the international and cultural awareness – that speaking a foreign language brings (D). The report also identifies strong indications that the need for language skills is increasing and that there is latent or unrealised demand implicit in the behaviour of employers (E), for example, in the recruitment of foreign nationals. In a survey of employers in more than 30 European countries¹⁹, UK employers emerged as the most enthusiastic recruiters of graduates from outside the EU, with 49% recruiting from outside Europe, compared to an average of only 21%. The UK was also among the top countries for recruiting graduates from other European countries: 57% of UK employers recruit from other EU countries, compared to an average of 30%.

Which languages are in demand?

16. Currently a large proportion of the explicit demand for language skills – around half – is for the major western European languages most frequently taught within UK schools: French, German and Spanish. It is encouraging that links clearly exist between the languages taught and the languages most used in working contexts at present. However this is increasingly not the case in the UK.
17. The *State of the Nation* report draws together evidence highlighting that businesses and public sector organisations are already using a much wider range of languages in their operations. Indications of future demand show that a growing number of languages will be needed as the UK expands its global connections and responds to new economic realities. These include not only world languages such as Mandarin, Arabic and Russian – but also Turkish, Farsi and Polish. Without a system of language provision that can respond to the speed of globalisation,

¹⁸ Graham, 2012.

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

Case Study: Foreign and Commonwealth Office

Language capability forms an important principle within the Foreign and Commonwealth Office's new 'excellence in diplomacy' policy. In order to achieve this, the FCO has increased both the budget for teaching languages and the number of posts designated as 'speaker slots' for which languages are an absolute requirement. It has also raised the bar on the level of language competence which diplomats are expected to achieve and for most posts this is now what is internally designated as 'operational level'. Full-time training is provided for staff who will occupy these positions, which are generally at management rather than administrative grades. The FCO allows 22 months full-time to achieve a high level of competence from scratch in languages which are difficult for English speakers to learn, such as Arabic and Chinese. This includes a year living in a country where the language is spoken. For languages which are more similar to English, such as Spanish, the time allowed is 7 months.

communication and mobility between people and places, we are already at a disadvantage.

Where are languages needed?

18. Languages are used in every sector of the UK economy, and in the public and voluntary sectors as well as in private enterprise. IT, Finance and Creative/Media/Marketing have been identified as particular industries where there is currently an above average or growing need for language skills.
19. Although most jobs with languages are based in London and the South East of England, evidence linking language skills to better business performance and penetration of new markets is relevant to all the regions of the UK. If businesses are to achieve growth, languages are a 'must-have'. Promoting languages enhances the overall skill levels of the population, encourages international engagement and attracts foreign direct investment. Outside London and the South East, there are indications of a particular need to stimulate explicit demand for language skills.
20. Language skills are needed at all levels in the workforce, and not simply by an internationally mobile elite. Comparisons of recent National Employer Skills Surveys indicate that 17% (2009) and 27% (2011) of vacancies in administrative and clerical roles went unfilled due to shortages of foreign language skills. Widening access to language learning represents a key challenge for language education policy.

Supply

21. 39% of the UK adult population claim to be able to speak at least one language, besides their mother tongue, well enough to have a conversation.²⁰ This compares to an average of 54% across 27 European countries. Around a quarter of that proportion have a language other than English as their mother tongue, meaning that UK language capacity is significantly provided by people who already use another language in their homes and families.
22. The languages spoken by British schoolchildren, in addition to English, represent a valuable future source of supply, if these skills can be developed appropriately. In England, for example, 15% of primary and secondary schoolchildren speak English as an Additional Language.²¹ London is generally regarded as the most multilingual city in the UK and the latest research puts the number of languages spoken there at 233.²²
23. Mapping and naming the languages and the numbers of speakers is the first step towards the strategic development of mother tongue language skills. A report on community languages teaching in England, Scotland and Wales²³ showed that at least 61 of the many languages spoken were already being taught to children of school age at complementary schools or centres run by parents. It also found that as many as 35 languages were being offered by mainstream schools, either as part of the core curriculum or as an enhancement after school hours. This burgeoning supply of language skills must be built upon in order to harness its value for the wider community.

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

24. Languages are already very vulnerable in higher education and likely to become more so. Although actual numbers of students have flatlined over the last decade, rather than declined absolutely, they represent a narrowing share of overall student numbers. Linguists accounted for just 3% of undergraduates in the academic year 2010/11.²⁴ Of this 3%, just over a sixth represents EU or international students. Indeed, the number of UK domiciled undergraduates taking language courses has dropped by 5% since 2001/2.

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

21 DfE, 'Maintained Primary and Secondary Schools. Number and Percentage of Pupils by First Language', 2012.

22 P. Baker and John Eversley, *Multilingual Capital: The Languages of London's Schoolchildren and Their Relevance to Economic, Social and Educational Policies* (London: Battlebridge, 2000).

23 CILT, SCILT and CILT Cymru, *Community Language Learning in England, Wales and Scotland*, 2005.

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

Case Study: Gatwick Airport

As one of the world's busiest airports, serving more than 200 destinations, Gatwick Airport is a quintessentially international environment. Its 2,200 employees have to ensure that 34 million passengers a year are transferred swiftly and safely to their destinations. As part of its commitment to customer service, the Airport has instituted language training for staff in the front line of dealing with the public. Those helping passengers through security, or assisting with information to make sure people can find their way around, choose from a range of the languages most commonly needed at the airport. They learn basic language relevant to their role, such as 'liquids' or 'sharp objects' and, after successfully completing the course, their language skills are recorded so that they can be called to deal with typical communication problems which may arise. Participants are of all ages and come from a range of backgrounds: some have university degrees, others lower level qualifications. The Airport also directly employs a small number of specialist linguists, who cover a variety of languages between them. These are called to interpret when more complex situations arise. In the past the Airport simply drew ad hoc on the language skills of its employees. Now there is a much more strategic approach, with the training organised in partnership with the union, Unite.

25. Information from August 2012 shows that UCAS acceptances for European language courses are down 10% and those to non-European language courses have dropped over 14%. This is almost three times greater than the general reduction in applications which has been witnessed across all subjects since 2011.²⁵ Early evidence attributes this to the changing fees regime.
26. The position of languages in state-maintained schools indicates that this vulnerability will be ongoing. Declining numbers of learners UK-wide are opting to take language subjects beyond the compulsory phase and attrition levels after GCSE are also high. Only 9% of pupils taking French to GCSE progress to A-level, for example.²⁶ Following its recent research survey, the European Commission has drawn attention to the very low levels of foreign language competence being achieved by pupils towards the end of compulsory education. We are a long way from our ambition to create a multilingual workforce able to reap maximum advantage from the Single Market.
27. More positive indications are provided by stable and slightly increasing participation at A-level/Highers in Northern Ireland and Scotland respectively, and by the fillip to numbers taking GCSE language courses in England provided by the English Baccalaureate. A survey for the Department for Education (DfE) in

²⁵ 'UCAS Applicant Statistics 23 August 2012' www.ucas.ac.uk/about_us/media_enquiries/media_releases/2012/20120823.
²⁶ DfE, 2012, Subject progression from GCSE to AS and continuation to A-level.

Case Study: Bosch UK Ltd

Bosch is a global engineering company with its headquarters in Stuttgart, Germany, employing over 4,000 people in the UK. The Bosch Group comprises subsidiaries in 60 countries and its company language is officially English. However, staff who have dealings with the company head office, including many senior managers, require German – this may be up to a quarter of staff employed in the UK. As day to day contact with head office increases, so the need for competence in German is growing – mainly among engineers and sales staff but also in HR and IT functions. Alistair Cumming, Head of Training and Personnel Development, says that the need for German becomes evident when emails are forwarded – although the request to the individual is formulated in English ('Can you deal with this?') the email trail below it is in German. As a result, around 150 UK staff are currently undertaking training in German. In addition, certain senior managers on a particular career path within the company are required to work abroad for 2 years, and this requires language skills. Where this involves placements in third countries, other languages come into play and intensive training is provided in languages such as French, Chinese and Malay. However, Bosch does not make language competence a requirement at the recruitment stage. The company says that this would be too limiting as regards the choice of applicants: language skills are not required at the expense of other skills the company values. At the same time, the company recognises that those who have learnt German at school are better-placed to pick up the language quickly through the training they provide.

2011 found that 52% of Year 9 pupils were going into GCSE languages classes the following school year²⁷, which compares with 40% of the Year 11 cohort who took the exam in the same year.²⁸

28. However, comparison to international education systems has raised questions regarding the quality of language courses in English schools. This in turn has implications for Wales and Northern Ireland where the same assessment systems are in use. Indeed, England's results for levels of achievement in first and second foreign languages were at or very near the bottom out of all participating European countries in the European Survey on Language Competences. Only 9% of those surveyed were deemed to be at the 'level of independent user' (which broadly corresponds to the grades A*–C at GCSE).²⁹
29. Language education in the UK is largely based on three European languages: French, German and Spanish. Opportunities to study or obtain qualifications in other languages are more limited. There is a mismatch between: (a) languages offered in schools (beyond the 'big three'); (b) languages in which it is possible

²⁷ Clemens, op. cit.

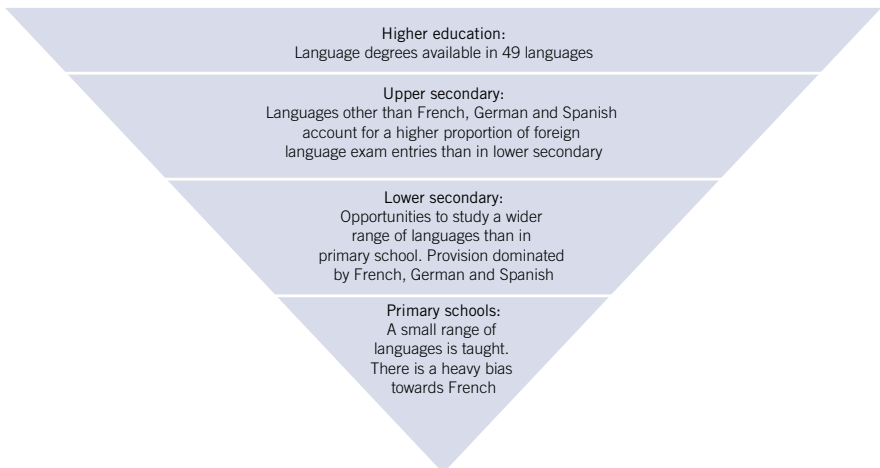
²⁸ Tinsley and Han, op. cit.

²⁹ European Commission, *First European Survey on Language Competences. Final Report*.

to train as a teacher; (c) languages in which formal accreditation is available; and (d) languages spoken by schoolchildren. At university level too there are limited opportunities to take degree courses in some of the languages most strongly represented in the school population, such as Panjabi, Urdu and Polish. This is in spite of growing numbers entering for less traditional A-level language exams. Polish, for example, has seen A-level entries double over the past three years, whilst Russian, Arabic, Turkish and Portuguese entries have risen between 19% and 26%. Concerns about the barriers to moving language teaching from an 'enrichment' option to mainstream curriculum offer, in the case of Mandarin, for example, were raised in 2007.³⁰ These might partially explain the disconnect between wide language capacity within schools and the narrow formal accreditation on offer to students.

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

Figure 3: Diversity in language education – UK overview



30 CILT, *Mandarin Language Learning. Research Study. Department for Children, Schools and Families, 2007.*

Who is more likely to learn a foreign language?

31. Four out of five undergraduate linguists study in pre-1992 institutions, compared to half that proportion across all subjects.³¹ Languages tend not to be combined with STEM or more vocational subjects at university and even less so in schools and colleges. Business studies is the most common ‘vocational’ degree subject to be combined with languages. Nonetheless, Brits generally have positive attitudes towards foreign language learning – a special Eurobarometer survey found that 72% of UK residents agreed with the statement that ‘Everyone in the EU should be able to speak at least one language in addition to their mother tongue’.³²
32. Language learning is strongly associated with social advantage, starting from primary school and becoming particularly evident in achievement figures at GCSE, A-level and in acceptances to university courses. Indeed, nearly a third of linguists in higher education come from independent schools (while only 18% of the post-16 school population attend these schools). Furthermore, just 14% of children eligible for free school meals obtained a good GCSE in a foreign language compared to 31% of other pupils. Conversely, Chinese, Asian and Mixed Race pupils, and those who speak English as an Additional Language, are more likely to gain a good GCSE in a language subject than pupils whose ethnicity is Black or White, or who speak English as their first language.
33. A greater proportion of females to males take languages and this disparity becomes more marked as learners progress through the system. At university, languages constitute the most gender-marked of all subject groupings. Just 33% of languages students are male.³³

Mismatch of supply and demand

34. The precise extent of language needs in the workforce is difficult to quantify because of the amount of demand which is implicit or latent. However, there is strong evidence to confirm that the UK is suffering from a growing deficit in foreign language skills at a time when demand for language skills is expanding.
35. The *State of the Nation* report identified the mismatch between demand and supply in three key areas:
 - a. **Around half the demand identified as key to future economic growth involves languages which are difficult or impossible to study within the UK education system.** Although the

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

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

33 CILT op. cit.

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

b. Learning languages is rarely combined with the acquisition of other workplace skills.

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

c. Language courses are seldom thought relevant to learners with lower academic attainment.

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

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

Market failure

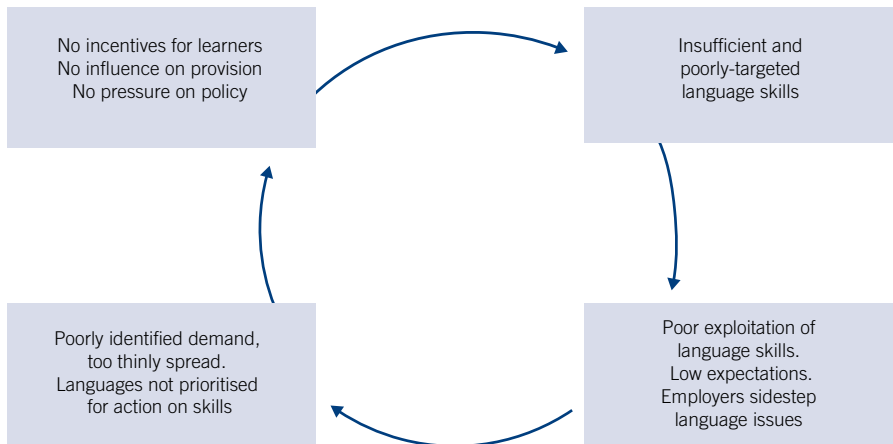
35. Evidence linking language skills to better business performance and the ability to access new markets is strong. Employers have made clear that they want to see more people come into the workforce with at least a basic knowledge of foreign

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

languages, along with a more globally-attuned mindset. The British Chambers of Commerce, for example, has called for languages to be made compulsory for all up to AS level.³⁵ Yet these requirements have not been translated into incentives for either learners or for course providers to make this a reality.

36. The report concludes that this state of affairs has to do with the way that UK employers respond to the weak supply of language skills, which interferes with the smooth-functioning of market forces. There is evidence that they may underestimate their current and future needs, or avoid language issues by dealing only with people who speak English. Some train existing staff in language skills as an alternative to recruiting directly, but the most common way of fulfilling needs is by appointing native speakers.
37. The presence of native speakers not only raises the bar for British candidates who have to compete with them, but at the same time ‘spoils the market’ in language skills by diluting messages emerging from skill surveys about the lack of language skills in the UK labour force. It also blunts the information which is then made available to learners, course providers and policymakers. Such market failure is damaging to the interests of UK nationals.
38. This vicious circle is summarised in Figure 4. Because policy interventions on languages have tended to address the learner dimension in isolation from the demand side, they have not, as yet, been powerful enough to make the market for language skills work effectively.

Figure 4: Market failure in languages



³⁵ British Chambers of Commerce. *op. cit.*

Case Study: B&Q

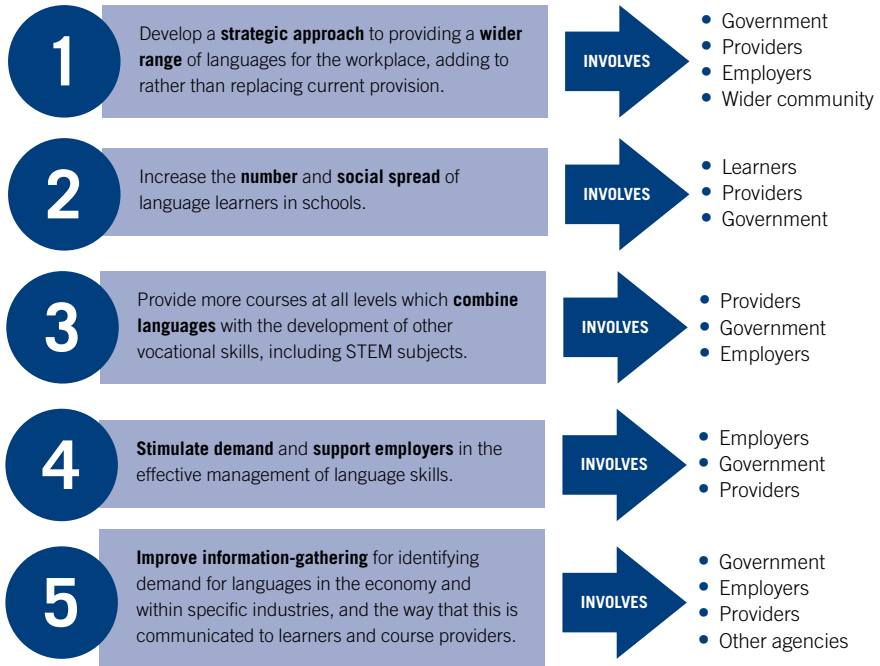
B&Q is a leading home improvement and garden retailer and employs around 1,000 staff at its head office in Southampton. Although popular wisdom is that foreign languages are needed for sales and that 'you can buy in your own language', the language need in B&Q is for purchasing. By teaming up with partner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

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

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

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

Key priorities for action



L&
QS

In 2011 the British Academy launched a four year programme to support Languages in the humanities and social sciences. The Academy's programme is committed to a range of research support, partnerships and other activities, seeking to demonstrate the value and importance of languages for the health and wellbeing of education, research, individuals and society at large. The British Academy for the humanities and social sciences has been supporting the best in UK and international academic research for over a century. Established by Royal Charter in 1902, the Academy is a Fellowship of over 900 leading UK scholars and social scientists which works to further our understanding of the past, present and future through research, policy reports, publications and public events.

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