TNP 3
SUB-PROJECT TWO: LANGUAGES FOR ENHANCED OPPORTUNITIES ON THE EUROPEAN LABOUR MARKET

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Introduction
A brief overview of the national labour market

The national labour market in the UK offers many aspects that are common to advanced economies. While there are many positive aspects in the economy, there are certain specific problems linked in part to the position of the UK, to its traditions of business and, particularly in a language context, to the role of English in the global market place.

Population

The UK has a population of some 58.8 million, of whom 49.14 are resident in England, 5.06 million in Scotland, 2 9 in Wales and 1 7 in Northern Ireland (national statistics on line: www.statistics.gov.uk/ ; www.nisra.gov.uk; www.gro-scotland.gov.uk)

Since 1960 population growth has been about 3% per annum and the UK has an aging population (about 18% of the population are aged 65 or over) with a falling birth rate, the effects of which are offset in population terms by the fact that the population is living longer and, to some extent, by immigration which in the 1990's rose to over 90,000 per annum. (Harrington, R L (2001) 'The UK Economy in Context' In M.Sawyer, *The UK Economy.* Oxford, New York, Oxford University Press, pp1 -21)
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Employment and Unemployment

The current unemployment rate is 4.8% for the UK as a whole (www.statistics.gov.uk) but there is regional variation with the North East having the lowest employment rate and the South East the highest. The very lowest employment rates are, however, concentrated in parts of London, Wales and Northern Ireland (*Full and Fulfilling Employment: Creating the labour Force of the Future*, White Paper July 2002, p 38). There have been increases in the number of employees, in the number of the self-employed and also in the number of part-time workers. (www.statistics.gov.uk).

The UK is said to have one of the highest levels of labour force utilisation in the OECD (ie hours worked per employee, employment rate and labour force participation rate) and, in this respect is behind only Japan and the United States. (Porter, ME, Ketels CH (2003), *UK Competitiveness Moving to the Next Stage*; TUC: *Shifting to the High Road: A response to the Porter Report*, 2003). A report published in 2002 indicated that the UK had the third highest labour participation rate in the EU (*Full and Fulfilling Employment*, p 14)

About 11% of UK employment is self-employed; 7% are in non-permanent work; 24% work part-time. Nearly 3 million people work mainly at or from home and nearly

1.8 million are teleworkers on a regular or occupational basis (*Full and Fulfilling Employment*, p 43). New patterns of working are emerging with only 35% of employees working a 'standard' type week with 9 to 5 type starting and finishing times. Almost a quarter work part-time (four fifths of whom are women). (*Full and Fulfilling Employment*, p 43)

The Economy and its sectors

These statistics together with a modest growth rate in the economy that is roughly comparable to other major economies (Harrington, 2001) and indicated in a recent article to be about 2.5% (Kaletsky, A (2003), 'Advantage, server: Why Britain's economy will stay ahead', *The World in 2004*, The Economist, pp 30-31) would suggest a reasonable state of affairs but there are less positive aspects. A continuing concern has been the steady fall in the manufacturing base that has been constant over a number of decades and although the value of what is produced may be showing a small but steady rise, the share in the GDP has decreased (Harrington 2001). However, at just under 20% the share is not dissimilar to that of other developed economies and like them the UK may now largely be described as a service economy. There has also been a long-term fall in agriculture. A major sector in the UK is Business Services, finance and property which has shown a continuing rise and is now the largest sector (although currently business services are tending to show more growth than finance). The health of this sector no doubt reflects the role of London as a centre for financial, legal and other professional services although Harrington (2001) notes that a rise in the area is not uncommon in developed countries. He also indicates that services account for about 20% of total trade (Harrington 2001)

Sectors of the economy: percentage shares of GDP

Percentage shares of the different sectors in the GDP quoted in a recent study show the following breakdown:

Agriculture, forestry and fishing	1.2%
Manufacturing	19.3%
Energy and Water	3.9%
Transport and Communications	7.9%
Construction	5.0%
Distribution, hotels and tourism	14.8%
Business services, finance and property	26.3%
Public Administration and defence	5.1%
Education, health and social work	11.6%
Other	4.9%

(Extracted from Harrington, 2001; figures for 1998)

Sectors of the economy: percentage shares of employment

For employment percentages of total employment the pattern is similar although the share of employment may be greater or less than GDP:

Agriculture and fishing	2.01%
Manufacturing	16.86%

Energy and Water	0.86%
Transport and Communications	6.69%
Construction	7.11 %
Distribution, hotels and restaurants	24.20 %
Finance and business services	20.85 %
Public Administration, education and health	25.49 %
Other services	6.31%
Total services	83.14%

(Extracted from Green, F (2001), 'Employment, Wages and Unemployment'. In M.Sawyer, *The UK Economy.* Oxford, New York, Oxford University Press, pp 198 – 223: figures from 1999)

The above pattern is in sharp contrast to the 1950's where about one and a quarter million still worked in agriculture and over eight million in manufacturing, whereas there are now about one third of a million employed in agriculture and about four million in industry (Harrington, 2001).

Currently, the UK is increasingly losing its low cost advantage in services as well as manufacturing as developing countries move to take up work in these areas. (Porter, ME, Ketels, CH (2003), *UK Competitiveness Moving to the Next Stage*; TUC *Shifting to the High Road*: *A response to the Porter Report*, 2003). This is contributing to the overall picture as it creates some loss of employment and the need for employees to find other areas of work. Press reports note, for instance, outsourcing of call centre work abroad, in particular to India where English is widely spoken. The White Paper, *Making Globalisation a Force for Good*, published in July 2004 argues, however, that such job losses are matched by job gains (*Making Globalisation a Force for Good: Trade and Industry White Paper*, October 2004, p11). A contributory Economics Paper to this White Paper, *Maximising the Benefits of International Trade and Investment*, quotes research indicating that by 2010 100,000 jobs in financial services will be off-shored and also points to other research which suggests that more than 22,000 posts could go in all sectors. Research highlights too the fact that such off-shoring holds the danger of loss of knowledge and skills (*Maximising the Benefits of International Trade and Investment*, DTI, July 2004, p 57)..

Companies

Using the EU definition for company size (that is with small being under 50 employees; medium 50-250 and large 250 and over), in 1998, 64% of business had no employees but were responsible for 12.7% of employment; small businesses with one or more employees were responsible for 11.6% of employment (but only 0.7% of business). Large businesses were responsible for 0.7% of business but 43.7% of employment. In the manufacturing sector SME's are less significant with small enterprises accounting for 28.9% of employment, medium for 20.7% and large for 50.5%. A research report by the TUC: *Small firms – myths and realities*, published 2003, points out, however, that while employment in small firms still remains highly significant, employment in small firms did fall somewhat during the 1990's. This report shows that 53.3% of those who work in services worked in large firms (ie 250 and over) and, in addition, that 51.6% of those in manufacturing worked in large firms. Between 1994-1996 and 1999-2001, the share of employment in large enterprises rose from 47.7 to 51.3%. Between 1995 and 2001 the share of employment in large firms went up most in sectors such as hospitality (up from 34% to 47%) and distribution (up from 43% to 54%) (TUC: *Small firms – myths and realities*).

Business consolidation, mergers and takeovers

Concentration of industry may be noted, for instance, in the statistic which suggests that the five largest firms in any industry when ranked in terms of employment accounted for 30.8% of employment and 40.5% of sales but there are naturally differences between industries. Whereas the level of concentration rose in the first 70 years of the twentieth century, it seems to have since levelled out.

Mergers fall into different categories. There are first of all purely domestic mergers which take place within the UK, with both parties being UK companies or groups of one type or another. In this category the level in 1999 was 493. UK companies are also active in acquisitions abroad, with the number in 1999 standing at 521. Takeovers of UK companies by overseas companies in 1999 stood at 227 and, in general, this figure seems to run at just under or just over half of the acquisitions by UK companies outside the UK (Sawyer, M (2001), 'Industry: its structures and policies towards it'. In M. Sawyer, *The UK Economy.* Oxford, New York, Oxford University Press, pp157 - 181).

Investment

The UK is described as having a serious investment problem in both physical and human capital (Porter, M (2003), *UK Competitiveness Moving to the Next Stage*; TUC *Shifting to the High Road*: *A response to the Porter Report* 2003). The UK's rate of growth of capital investment is lower than major competitors, 60% behind France, 32% behind Germany and 25% behind the US. In addition, although there are significant levels of investment at higher levels in companies, in more intermediate levels the UK lags behind countries such as Germany and France. (Porter, ME, 2003; TUC *Shifting to the High Road*, 2003).

Workplace performance

It has been suggested that not only is there insufficient investment in human resources but also that management practices are not such as to build adequate communication and employee involvement, something that would be necessary to create the high performance workplaces necessary to the delivery of higher productivity levels (TUC *High Performance Workplaces*, 2003). Reports have indicated a persistent productivity gap between the UK and its main competitors (eg Netherlands 25%; USA 15%: France 11%; Germany 8%: see the web site of the European Industrial Relations Observatory: www.eiro.eurofound.eu.int/2003/12/feature/uk0312103f.html).

The TUC report suggests that productivity in foreign-owned manufacturing firms in the UK is higher than in British-owned firms. To improve matters in this regard, the TUC looks to the implementation of the EU directive on Information and

Consultation (due for UK implementation by March 2005) (TUC *Shifting to the High Road* 2003 ; *High Performance Workplaces*, 2003)

International Trade and Export Performance

Trade is important to the UK with exports accounting for approximately a quarter of the national income (and sometimes slightly above this figure). Within Europe the share of trade in the UK's GDP is roughly comparable to that of Germany, France or Italy although for smaller European nations trade would play a more major role in the GDP (Harrington 2001). The UK tends to have a balance of trade deficit.

On a world scale the UK share of world trade is roughly constant at 5% (Sawyer, M (2001), 'The Structure of the Economy' In M.Sawyer, *The UK Economy.* Oxford, New York, Oxford University Press, pp 22 –42)

The UK is not part of the eurozone. A referendum has been promised prior to joining and it is currently unclear when (or if) entry is likely to take place. However, since entering the EU in 1973, the UK's trade with other EU members has increased and more than half the UK's trade is now with other EU countries (Sawyer, 'Structure of the Economy', 2001). Another survey undertaken for *Professional Manager* in March 2002 revealed that for 30% of British companies over half their customer base is outside the UK and that over 70% conduct some business with other countries (*Languages for all: Languages for Life: a strategy for England*, 2002, DfES, p. 13). A strong pound as against the euro makes it more difficult for British manufacturers to sell abroad and has created a number of difficulties for companies. On the other hand, (as indicated in Kaletsky (2003) 'Advantage, server:' pp. 30-31) more control is maintained over monetary management, with for instance the Bank of England's ability to set interest rates flexibly.

Outward and Inward Investment

Corporations, in particular (but not only) large ones, based in the UK invest in other countries and produce goods abroad, often where production costs are lower. An estimate for 1998 suggested that some 1094 parent companies based in the UK were also producing abroad and that 2683 foreign affiliates were located in the UK (Sawyer 'Industry: its Structures', 2001).

A White Paper published in July 2004 indicates that the UK receives more foreign direct investment than other EU countries and that it is the world's second largest supplier of foreign direct investments (*Making Globalisation a Force for Good: Trade and Industry White Paper*, October 2004, p10).

Statistics given by Sawyer paint the following picture of foreign ownership within manufacturing in the UK. Of over 160 000 enterprises 1486 were foreign owned, accounting for 17% of employment. Of these 30.8% were EU owned; 37.2% were US owned and 8.5% were Japanese owned. (Sawyer: 'Industry: its Structures' 2001: statistics from 1995). Foreign owned companies are strongest in the chemical industry, manufacture of office machinery and data processing equipment, electrical and electronic engineering, manufacture of motor vehicles and parts, instrument engineering and processing of rubber and plastics (Sawyer 'Industry: its Structures': 2001). Employment in foreign-owned manufacturing companies is somewhat greater in West Midlands, Wales, North East and Scotland than in other regions.

Conclusion: Implications for Languages

This brief account of the labour market clearly suggests the need for enhanced export performance in a situation of trade deficit, to help offset the problems of competition from low cost manufacturing countries, to help to increase the export share in highly quality-sensitive industries and to counter problems raised by exchange rates. At the same time, it is clear that certain traditional weaknesses are likely to work against a full acceptance of the need for improved language competences: low investment in human resources and also a tendency to focus on short term profitability rather than taking a longer view (TUC *Shifting to the High Road: A response to the Porter Report*, 2003) Also relevant in this connection is a criticism made by Professor Porter that that British businesses are insufficiently engaged with the outside world (Porter, *UK Competitiveness Moving to the Next Stage* 2003; TUC *Shifting to the High Road* 2003) (and while he may have been thinking of the national outside world and the potential infrastructure supporting business innovation, this attitude is also indicative of a certain inward looking self sufficiency that is not propitious to an open attitude to the wider world beyond the country).

These attitudes combine with the widespread use of English in international business to persuade both certain companies and a sizeable part of the population that they can very well make do with English.

Government and leaders of business organisations are not necessarily of this opinion, as may be seen in different studies and reports discussed in section 2 which indicate an awareness on the part of government and its agencies of the crucial role that languages may play. They also reveal a recognition of the pressing need to promote relevant language learning in the interests of improved trading and export proficiency in the contemporary situation of globalised trade.

Section 2

2 New linguistic demands in the private and public sectors resulting from European integration and globalisation: languages and skill/ competences

At national levels in the United Kingdom, an understanding of the country's need to enhance proficiency in foreign languages so as to improve export performance at a time of European enlargement and increasing globalisation has led to a number of studies and reports. Some of these focus particularly on the current state of language learning and teaching while others concentrate mainly on the use of foreign languages by business and industry, although both types of study inform one another. Some have been undertaken under governmental or quasi-governmental initiatives, while others owe more to individual endeavour as well as European funding support. These reports and studies yield important information regarding linguistic demands, the use of foreign languages in business and industry as well as indicating challenges for both present and future. For this reason this section starts with an (inevitably schematic) outline of what has been undertaken.

The Nuffield Enquiry

In 1998, the Nuffield Enquiry was established to examine the state of language learning in the country and consider needs and desirable developments. Its final report, *Languages: the next generation*, was published in May 2000, a wide-ranging investigation into the state of language learning nationally, highlighting both deficiencies and some good practice with recommendations for the future.

Languages for All: Languages for Life: a strategy for England

The present English position with regard to school and university qualifications in languages is summed up in the recent policy statement: *Languages for All: Languages for Life: a strategy for England* (DfES 2002). It indicates while there are still a reasonable number of pupil entries for language GCSE's (the first stage of English leaving examinations), two years later at the 'A' level stage (the final stage in schools and the examination determining university entrance) there are fewer than 5% of total entries taking languages. Numbers are also declining at degree level with 'fewer than 3% of students in 2000/01 enrolled on first degree courses studying language subjects' (p.11).

A New Landscape for Languages

A further, more recent report, commissioned by the Nuffield Foundation, *A New Landscape for Languages*, by Michael Kelly and Diana Jones, considers changes in languages in 16-19 and in Higher Education and their implications for both the HE sector and for schools and colleges (London, The Nuffield Foundation, 2003). This report notes in particular increased demand for languages as a supplementary skill which has been accompanied by a decline in the numbers taking named degrees in languages.

Languages Count

This report considers the position of language learning in Wales and lays out the Welsh Government's strategy for language learning. (*Languages Count: The Welsh Government's National Modern Languages Strategy*, Welsh Assembly Government, Cardiff, April 2002)

Languages for all: from Strategy to Delivery

This paper, published in 2004, considers progress in the implementation of the languages strategy outlined in the strategy document of 2002: *Languages for all: Languages for life.* (*Languages for all: from Strategy to Delivery*, Department for Education and Skills, 2004)

Study of Languages: a problematic area

Despite government concerns and positive proposals to promote language learning among children of school age by giving all primary school children from the age of seven (key stage 2, years 7-11) the entitlement to learn a language by 2012 (*Green Paper14-19: extending opportunities, raising standards*, 2002) (cf also *Languages for All: Languages for Life: a strategy for England*, DfES, 2002), there must be some concern as to whether or not this will be enough to reverse a situation where nine out of ten students stop learning a language after 16 (*Nuffield Report*, 2000). If language learning becomes optional after the age of 14, whatever the inducements within schools to study languages (*Languages for All: Languages for Life: a strategy for England*, DfES, 2002), this is hardly sending out the right messages to young people and the schools, something which is in fact recognised by certain employers (cf: SEMTA: Science, Engineering and manufacturing technologies: *Language Skills Analysis Report*, 2003. Case Study 3, quotes an interviewee as stating: "English being a world language militates against foreign languages being taught in schools...it would be better for us as a nation if we had a stronger emphasis on learning a second language (in school)." p. 28).

Certainly the interim report by the Working Group on 14 -19 Reform, established following the DfES policy document *14 -19 Opportunity and Excellence* (2003) is not encouraging for linguists, since the core studies as described in it are not inclusive of foreign language knowledge at whatever level. (Working Group on 14-19 Reform 14-19, *Curriculum and Qualification Reform. Interim Report of the Working Group*, February 2004, pp.19-23).

A report published by Ofsted (the inspectorate for schools) at the end of September 04 tends to confirm that the situation remains problematic despite the many positive developments within the United Kingdom in the implementation of the languages strategy. The Ofsted report shows that the number of pupils taking modern languages at GCSE is expected to drop sharply in the current year (2004 –05), after a 30% decline in take-up. Commenting on this Graham Lane, chairman of the 14-19 education group for the Local Government Association was of the view that making foreign languages optional 'has done schoolchildren a huge disservice' and has 'reduced the employability of young people at a stroke' (*The Guardian*, 05 October, 04, p.8). The same article in the *Guardian* also quotes figures for French for one Examinations Board, Assessment and Qualifications Alliance (AQA) that show that there were in 2002, 73 000 candidates for GCSE French (taken two years before the final leaving examination); in 2003 55, 000 and in 2004 the numbers had dropped to 46,000. A number of factors may contribute to this drop, one of them being the difficulty in certain areas of the UK in recruiting good language teachers which, according to a Head Teacher quoted by the Guardian means that 'schools would rather abandon the unequal struggle that develop an unsatisfactory curriculum'. The problem of the world status of English is also considered a factor as is the perceived difficulty of languages which means that to perform well in the league tables compiled nationally for schools performance, schools are directing students into subjects seen as easier.

These negative factors have to be set against positive developments in certain schools where alternative methods of teaching languages, as in combining them with business, are being pioneered and the national concern about the situation. Within the pre-university sector there is, for instance, the Pathfinders initiative, set up in January

2003 and designed to develop new approaches to education for the 14-19 age group. One of these schemes, the Black Country Pathfinder led by the Black Country Learning and Skills Council, has languages as its main scheme and involves cooperation between education and work providers to develop qualifications which integrate languages into vocational training packages (the Black Country is situated to the immediate North West of Birmingham and comprises the boroughs of Dudley, Sandwell, Walsall and Wolverhampton).

Within the school sector there are also initiative in Content and Language Integrated learning (CLIL) with a three year pilot project, Content and language Integrated project (CLIP) which is studying the implementation of content and language integrated learning in primary and secondary schools and offering support for the introduction of CLIL (*Languages for All: from Strategy to Delivery*)

Modern apprenticeships are schemes which allow qualifications to be gained while working on a job and which lead to NVQ qualifications. While these belong to the pre-higher education level of study, it is interesting to note that Sector Skills Councils are now required by the Learning and Skills Council to take languages into account when frameworks such as those for Modern Apprenticeships are being developed.

One particularly interesting initiative is the development of the Languages Ladder, a voluntary recognition scheme that will complement national qualifications frameworks and the Common European Framework. This scheme is designed to offer credit for language competence and form a ladder of recognition from beginner level not only to points equivalent to the final years of school work but also, through the stages of Proficiency and Mastery to be developed in association with HE, to levels within HE. The University of Cambridge local Examinations Syndicate (one of the boards offering the national qualifications) will provide assessment for the scheme. Pilots have been planned to begin in autumn 2004 with French, German and Spanish being included in the pilot. National roll-out is scheduled for September 05 with the probable addition of Italian, Punjabi, Urdu, Japanese and Chinese to the languages of the pilot (for further information see DfES website (www.dfes.gov.uk/languages/DSP_languagesladder.cfm) and *Languages for all: from Strategy to Delivery*, Department for Education and Skills, 2004)

The situation in Wales is also one of a reduction in the study of languages at different levels. The report outlining the results of the language skills capacity audit undertaken for Wales (see below for a discussion of these reports) notes that the decline in language take-up at Key Stage 4 (14-16 year olds) is a source of much concern to Wales (p. 8). The report also deplores the closure of language departments in the Universities of Lampeter and Glamorgan (p. 12) as well as the fact that there are only thirteen foreign languages studied in FE Colleges in Wales and that, at any level, there is only minimal provision of ‘rarer’ languages, such as Japanese and Chinese, increasingly needed by companies. However, the same report also cites (p. 8) the introduction of the Welsh baccalaureate with a compulsory language component as evidence of Wales’ efforts to educate its population for the global economy (this qualification is being rolled out in 18 schools in 2003-04, with a further 6 schools set to join in each of the two following years).

Studies of Language: Use in Business and Industry.

Despite the negative tonality of certain statistics, there is, in effect, much that is positive in the United Kingdom, something that emerges from the studies and audits that have been undertaken among businesses which reveal some good practice on the ground despite the considerable scope for improvement overall.

A forerunner

Surveys of language use have a considerable history in the UK as influencers and language academics seek to promote more extensive language competence among the population. One can think, for instance of the York Report published in 1974, the year after Britain was admitted to the European Union, and reflecting a consciousness of the need for enhanced linguistic competence in this changed situation (Emmans, K, Hawkins, E and Westoby, A (1974) *Foreign Languages in Industry and Commerce*. Language Teaching Centre, University of York)

More recent studies

However, a more recent series of reports began in the late eighties at a time of significant globalisation and consciousness within the EU of the importance not only of linguistic diversity but also of Europe's need to main its competitiveness in world trade. These reports have been spearheaded and coordinated by Stephen Hagen and have been, largely, supported by European sources of funding. These provide a wealth of data about language use in the UK as well as comparator statistics with Europe.

The work began with an analysis of the language needs of companies in the North East of England and a resultant publication. (Hagen, S (1988) (ed) *Languages in British Business: an analysis of current needs*. London and Newcastle, CILT and University of Northumbria Publishers).

Following this, Hagen led a number of extensive research projects on the use of languages in companies across Europe.

FLAIR-EUROPE (1993) was carried out with financial support from LINGUA. This was an audit project, leading to the establishment of a computerised database of the Foreign Language needs of 1300 small and medium sized enterprises in parts of Denmark, Holland, England, Germany and Spain. (Hagen, S (1993), FLAIR-EUROPE: A LINGUA Project Report).

ELUCIDATE was undertaken in 1996. This project studies the use of foreign languages in comparable samples of SME's from the Poitiers area of France , the Augsburg and Schwaben area of Southern Germany, the North East of England and the Salamanca area of Spain. The study looked at the extent to which companies had experienced language and cultural barriers in their international trade as well as analysing the successful strategies used by the companies to overcome such barriers. This transnational project was financed by the European Commission under the Leonardo da Vinci programme. (Hagen, S (1998), *ELUCIDATE Report. Business Communication Across Borders: A Study of Language Use and Practice in European Companies*. London, CILT). http://www.interactint.com/elucidate/english.htm

ELISE was also funded by Leonardo and sought to build on the outcomes of ELUCIDATE by considering language usage for export purposes among companies in other European regions. In this case, the participant countries or, sometimes, regions, were: Denmark, Holland, Northern Ireland, Republic of Ireland, Sweden, Scotland. (ELISE: European Language and International Strategy Development in SME's (2001), www.elise.europroject.org)

REFLECT (Review of Foreign Language and Cultural Training Needs) was a project supported by the Leonardo da Vinci programme which ran from 2000 to 2002. It reviewed and measured language and cultural needs , competencies and deficiencies in four target countries: Ireland, Poland, Portugal and the United Kingdom. (REFLECT (2002) www.reflectproject.com

British Chambers of Commerce: Language Survey: The Impact of Foreign languages on British Business

This survey published in May 2004 was undertaken by the British Chambers of Commerce and supported by the Learning and Skills Council with the aim of investigating the impact of foreign languages on British business (*British Chambers of Commerce: BCC Language Survey: The Impact of Foreign languages on British Business*, BCC, London, 2004).

Language Skills Capacity Audits and sectoral analyses

From 2000-2003 regional language skills capacity audits or similar studies were conducted across England in various regions. Full audits, considering provision and demand have been undertaken for Yorkshire and the Humber, North West (although this survey was conducted separately at different junctures), North East, West Midlands, South West, Wales, East of England. A mini-audit without a demand survey was undertaken for East Midlands. Another study was done in the South East which was essentially a feasibility study. A national audit was also conducted in Wales and reports have been made too on the situation in Scotland and in Northern Ireland. In the context of these studies, some 2545 international companies (exporters, importers or potential exporters) were surveyed across a range of sectors.

Following the formation of the Sector Skills Development Agency and corresponding Sector Skills Councils (who, replacing the work of the former National Training Organisations but now also covering university level outcomes, help to analyse labour market trends, pinpoint skills development needs and suggest suitable training models) data from these geographically-orientated reports was re-assigned to correspond with the newly emerging Sector Skills Councils. This led to language skills analysis reports being commissioned by CILT, the National Centre for Languages and compiled on the basis of the regional data for companies in the sector of science, engineering and manufacturing technologies (represented by SEMTA) (2003) and in that of e-skills through the Sector Skills Council for IT, Telecoms and Contact Centres (2003) (The e-skills report notes that call centres do not form a significant part of the sample surveyed which is primarily concerned with IT and telecommunications companies p. 7).

Manufacturing is, of course, an area which general studies of the UK economy have noted as having a declining share in the GDP and employment (see section one above) and where further export efforts could fruitfully be made. E-skills, on the other hand, is a sector where English is considered to be traditionally the major language of communication. However, 'with ongoing globalisation and the need for increasing competitiveness, e-skills companies have to seek further afield to maintain their market share' (e-skills p. 6).

Language usage and UK companies

The two sectoral reports thus cover a more traditionally rooted sector and the new sector of e-skills. They and the regional audits from which their data comes together with the other reports, provide a basis for a consideration of language use in business and approaches to languages by the business world. These reports tend to focus on the level of the company and the material which they gathered has clearly been made by a variety of respondents. Consideration of language use is also made at some level of generality and further research is still needed on the precise use to which language skills are put and the type of language deployed in particular situations.

While there are marginal differences in the statistics emerging from reports whether they are regional or sectoral, they all convey similar results and messages, regarding language use and level within companies, attitudes towards recruitment as well as new business and markets abroad.

Use of foreign languages in companies

In the regional surveys for England, the use of at least one foreign language is reported to be within the range of 52-70%. The SEMTA figures indicate a similar result with 57% of the companies surveyed claiming regularly to use at least one foreign language. In the E-skills sector, however, only 39.5% of companies surveyed claim to regularly use at least one foreign language and in this sector there is thus heavy reliance on the part of some on English and/or local agents for communication with customers.

Interestingly in all regions of the UK, including Wales, Scotland and Northern Ireland (in the latter case, the figures come from the ELISE survey of technological companies) as well as the SEMTA and e-skills reports, the languages most regularly used are French, German, Spanish and Italian. These are followed by a range of other languages which vary slightly but include Chinese and Japanese. Taking the example of the SEMTA companies, languages in regular use in their companies are French (43%); German (37%); Spanish (21%); Italian (11%) (and these are also the languages in which employees have skills). These markets are followed by Japanese (4%) and Chinese (3%). Among the e-skills companies, after the top four European languages already cited, come Dutch, Chinese, Japanese, Arabic and Russian but the variety of languages is less than for the SEMTA companies.

The range of linguistic demand is thus wide and the North West Report, for instance, quantifies it as 29 languages (p. 30). In reports, a consideration of actual export markets indicates, however, that even where a language is widely used by companies, the percentage of those exporting to the region is higher, suggesting that English must be used in these cases. There are also quite large export markets whose language ability amongst employees is either not mentioned or very low but these tend to be markets where English is widely spoken, such as the Netherlands, the Middle East and Scandinavia.

Languages as a barrier to trade

There is a recognition in different reports that language did constitute a barrier, although for e-skills at 40% this was lower than the average for the UK regions (45%) whereas for the SEMTA group it was marginally higher at 47%. For the various groups this reflected the nature of the export markets with French, German, Spanish, Italian normally up front and a variety of other languages among which were Japanese and Chinese (although the order could differ slightly).

A report undertaken among SME's also shows that 'language related constraints' represent one of the key obstacles in developing international markets (Connell, p.4 quoting Kalantaridis, C, *SME's in the Global Market Place: Processes, Barriers and Implications on Performance*, University of Luton, 1998).

Cultural differences as a barrier to trade

All reports indicated that companies also recognised that cultural differences could constitute barriers. In the e-skills group, 24% indicated that they had experienced cultural barriers which is a level higher than for other surveys where the proportion was approximately one in five (in the SEMTA survey it was, for instance, 21%). It was the cultures furthest from the UK that tended to be mentioned most frequently, namely for SEMTA companies Japan, China and the Middle East and for e-skills again Japan and the Middle East but also Africa and India. Nonetheless, countries in Europe did also give rise to cross-cultural problems. The e-skills group put France in second place immediately after the Middle East, while Italy and Spain are placed as four and five before Africa and India, showing clearly that the may be problems even within Europe in countries that do not apparently offer major cultural differences with the UK. For Wales, the areas cited as creating barriers, to whatever extent, included those where language use was the most frequent, namely French, German, Spanish and Italian and also Japan, China and the Middle East.

Companies considered that 'business etiquette' and 'management style' vary in Europe and if they may be said to be less visible, they are also by that very token more troublesome. In fact, meetings were considered to be the cause of the greatest number of cultural barriers, since they are also the focus for differences in business etiquette and management style (SEMTA report p. 18; Wales report p. 6).

Lost business due to language and cultural problems

It is not surprising to note that companies in all the surveys indicated that they had lost business due to language and cultural barriers. In Scotland, for instance, 27% said that business had been lost whereas for the North West the proportion was 22.4% and 19% for SEMTA companies but only 14% for e-skills. As the reports point out, this may well be an underestimate as lack of language ability may lead to a lack of realisation of lost business.

This loss of business is also documented in other surveys. An instance quoted by Connell refers to an individual who admitted having lost half a million pounds worth of business per year due to lack of use of language ability (Connell, p.3, from a survey undertaken by LanguageAdvantage: www.languageadvantage.com)

The BCC Languages Survey (2004) claims that a total of 77% of the companies interviewed claimed to have lost business over the 2 years preceding the survey. These losses were said to be due to varying factors such as the offer not being quite right for the market and needing adapting, sending the wrong goods abroad, or having them returned for some reason or because they had not received payment. While not specifically linguistic, these areas are in the main ones likely to be facilitated by good language competence.

Linguistic demands resulting from European integration and globalisation

As we have seen, the surveys indicated that four European languages are the most frequently used: French, German, Spanish and Italian (and in the general overview of the UK above section 1, we have seen that since entering the EU trade with EU has grown to constitute more than half the country's trade). An obvious impact of globalisation is on the range of other export markets (and thus their languages). This varies but is always quite wide. In addition to older EU areas of Europe, which go beyond the four languages cited, the e-skills report mentions Central Europe, Middle East, South East Asia, Africa, Japan, Russia, China, Latin America (p.10). The SEMTA survey has a similar spread (p. 9). The North West Report suggests there may be a small ongoing discernible trend towards Central and other European countries and towards some more distant areas such as China or Latin America. They point to the intensification of a need for Spanish and perhaps also Chinese and Japanese in the curriculum (NW report p.31). A study of small businesses: *Lifting the Barriers to growth in UK Small Businesses*, identifies overseas markets for this group. While 59.7% of these companies have no overseas markets and 13.9% did not give a response to this section, the EU accounts for 22.3%; Non-EU Europe for 7.8%; North America for 12.3%; Central and South America for 4.1%; Asia for 6.7%; Australia/New Zealand for 7.5%; Africa for 8.9%. While English-speaking countries or ones where English may be easily used do account for a proportion of trade, the proportion for Europe indicates that language competence should have a role to play within these companies (Carter, S, Tagg, S, Ennis, S, Webb, J, *Lifting the Barriers to growth in UK Small Businesses*, Glasgow, 2002)

Future international trade intentions

In the surveys, a sizeable proportion of international companies expressed the intention of trading in new non-English-speaking markets in the future (for instance in the SEMTA study this was 43% and in the e-skills report 46%). An extensive list of markets covering, for instance, in the SEMTA Report, over 40 individual countries was identified. What this suggests to the report writers is a wholly global market place where almost no language and no market are excluded. It also is clear that a major shift is to 'the burgeoning market of China and the potential markets of Latin America and Central Europe' (SEMTA report p. 24). Within Europe, the membership of the accession countries is also considered likely to create further linguistic demands for companies in a variety of sectors on account of the benefits of trading with other EU partners.

A similar point is made by Professor Connell in *Languages and Employability: A Question of Careers*, where he quotes a survey by the Institute of Export of international services provided to exporters. In a section on markets, this report points to the fact that companies are seeking to develop business with regions such as Latin America (76%), the Middle East (68%) and the Far East (67%), while Eastern Europe stands at 58%. (Connell, T J *Languages and Employability: A question of Careers*, 2002, London, City University, www.cilt.org.uk/careers/pdf/reports/employability/pdf, p.4. The report from which he quotes is: The Institute of Export and NCM Credit Insurance, (2000) *Eight Annual Survey of International Services Provided to Exporters*, Major Issue Ltd, p.31)

Market opportunity and language capability

It is worrying that reports identify what one of them calls 'a widening gap between market opportunity and language capability' (SEMTA report p. 9). Exporters' preference for markets where English is widely spoken (such as the Netherlands, Middle East and Scandinavia 'suggests that lack of language skills poses a psychological barrier to entering possibly the more lucrative markets where English is less spoken' (SEMTA; the e-skills report offers a similar message). This highlights 'a possible reluctance on the part of exporters to enter markets where linguistic skills are required and may constitute a major reduction in the potential markets available for companies' (SEMTA p. 9). It is noted in the e-skills sector that a lower proportion of exports are made to non-English speaking countries and this report also suggests possible reliance on a smaller, largely European customer base where English can be used more readily.

The SEMTA report, in fact, considers that the wide spread of demand means that 'the UK's formal system of provision in language learning would be unable to meet demand for such a diversity of need, which suggests that new approaches and new methods are needed'.

3 In relation to non-language graduates, what formal or informal linguistic and intercultural qualifications – languages / skills and competences – are sought after on the national market?

Situation of language usage

The reports offer information as to the situations in which language skills are deemed important.

The NW report gives the following table with percentages:

Telephones 29.3
Meetings 23.8
Negotiating 14.0
Correspondence 10.9
Travelling 7.3

Exhibitions 6.0
Socialising 4.9
Presentations 3.3
Handling technical literature 0.4
(Extracted from North West Report p. 15)

Other reports indicate similar areas. Wales notes, for instance, that face to face meetings and telephone conversations are key areas for language use and also that one fifth of language use was incidental to the main business as for purposes of travel or socialising (p. 5). Scotland too indicates certain activities, mentioning face to face contact, phone, fax, email, speaking, reading and writing letters (Scotland p. 11)

Scotland has also done a table indicating language use among groups of staff which points to sales and marketing staff having the greatest area of language use (pp. 11 and 12). This did not, however, hold true in Wales where, after managers, technical and engineering staff was the group most commonly cited (Wales p. 5)

The Scottish table of language use among groups of staff is interesting in showing the variety of functions which now require language knowledge:

Sales and Marketing 37%
Senior management 26% (in small companies senior management cover a wide range of functions)
Technical staff 9%
Service 6%
Purchasing 5%
Accounts 4%
(Extracted from Scotland p.12)

When we look at the sectoral reports, they largely summarise the results of the regional surveys for the companies concerned. The SEMTA report, for instance, (p. 7) suggests that regional analyses indicate that the most common situations in which target languages are used are on the telephone or in meetings where the use is more spontaneous and in correspondence. However, as the e-skills report points out, the importance of language skills should make itself felt not just in such interface situations but also in ‘setting up operations abroad; managing local agents; implementing multilingual websites; adapting sales literature; training foreign language staff and translating marketing literature for non-English speaking markets’ (e-skills p. 6). Skills are also required for switchboard interactions and meeting people as in exhibitions. Very importantly, it is noted in the e-skills report that language skills have also to be underpinned by ‘cultural fluency’ skills (e-skills p. 3).

Looking at areas of employment where languages are commonly used, in the sectoral reports the following picture emerges. In the e-skills report the language skills are mainly to be found among executives and technical/engineering staff with technical and sales/export staff said to have language skills at advanced level. In the SEMTA report, it would appear that linguistic ability is most prevalent among executives and general or sales managers (suggesting that languages are at least taken with some seriousness at different levels of sales).

A major problem area is that of lower hierarchical but functional levels where there is spoken or written interface with potential clients. In the SEMTA and e-skills reports, it emerges that secretarial staff have only limited competence and a similar picture is gained from the regional reports. The North West report indicates that there is a need for more telephonists, salespersons, secretaries or engineers with at least some language skills and also notes that only 12.8% of secretarial staff have language skills (NW pp. 14-15). In view of the fact that secretarial staff are the likely front line recipients of written communications in a foreign language, this is a worrying statistic. In the SEMTA report both technical staff and, indeed, lower level sales staff are indicated as also having only limited language knowledge. However, sales staff at various levels below that of managers may also meet occasions where the ability to interact in a target language could prove highly relevant. Findings of this nature underscore yet again the need for children at school to undertake language study as extensively as possible.

All the reports claim, in varying proportions, that business has been lost through company inability to follow up opportunities due to a lack of language and or cultural competence. It would thus seem that they are betraying a need for personnel able to understand enquiries and capable of pursuing these potential sources of additional business. At another level there can be switchboard problems so it is clear that first line operators on telephones require at least some linguistic ability. Problems in checking up on the activities of agents can also arise through lack of linguistic knowledge (SEMTA p. 20; e-skills p. 4) particularly as exporters without language knowledge have to rely on their agent for their information. Companies also tend to have a high reliance on outside language professionals. This can slow down response time to material written in a foreign language, compared to European competitors. Only 16% of SEMTA companies said that they paid for language training and for the e-skills group this was similar at 17%, both of which are lower than the surveys as a whole which stand at 21%. In the case of the e-skills group, this may be explained by its higher than average native speakers (see below for a discussion of the recruitment of native speakers) and employees with fluent skills (e-skills p. 4) but this is unlikely to be the case for the SEMTA or most other groups.

Recruitment and Language Skills

One statistic that is particularly telling emerges from the surveys in relation to the note taken of language skills in recruitment. In general, a proportion of the companies of 12-13% considered that languages as a criterion for the selection of staff was a strategy for overcoming language and cultural barriers (eg SEMTA report 12%; e-skills report 13%; North West 13.5%; Wales 13%). In Scotland, however, the proportion is higher at 22% but they add ‘at least for certain positions’. This may be compared to much higher proportions mentioning the use of local agents (58% in the SEMTA Report and 31% in the e-skills report, while for the regions percentages such as North West 52.8% or Yorkshire and Humberside 57% may be found).

Recruitment of Foreign Nationals

In this connection, it is perhaps encouraging to note that companies are employing native speakers. (31% of those surveyed in the e-skills report employed native speakers; 23.1% in the North West; 18% in Yorkshire and Humberside (though clearly this constitutes a missed employment opportunity for UK nationals). On occasion, the precise functions carried out by foreign languages are mentioned – for instance, in the North West survey, one company indicated that they employed language nationals for each of their Central and Eastern European markets (North West Report p. 5)

Given that both the SEMTA and e-skills reports found that a significant proportion of foreign language speakers were either native language speakers (SEMTA 26%; e-skills 38%) or had lived abroad in the markets themselves (SEMTA 13%; e-skills 12%), this does suggest that companies are recruiting, whether advisedly or by chance, at least some staff with good linguistic proficiency. In fact, in response to a question about their strategies for dealing with language/cultural barriers, 22% of SEMTA companies saw the employment of native speakers as a way around such problems. The e-skills report notes that the use of native speakers has risen notably in recent years which is ascribed to the increasing mobility of the workforce particularly in Europe (e-skills p. 4)

Use of foreign language nationals in work experience placements

There was a suggestion in the reports that schemes which offer placements to foreign students may 'also benefit a company and offer a cheap way of overcoming some language barriers' (to quote the e-skills report p. 23). While the recognition of need and the experience offered to young Europeans are to be commended, the cost-saving and impermanent nature of this solution is somewhat regrettable.

Staff with language competence

The surveys indicate that there are reasonable proportions of employees with language skills at some level. For instance, 65% of respondents to the SEMTA survey claimed to have employees with language skills but this is slightly higher than the 57% claiming to use languages on a regular basis. In the e-skills report, the proportion of companies with language skills is higher with 72% of companies claiming employees with such skills. The general regional industrial surveys have an average of 62% (e-skills p. 3) This indicates, as the report suggests, that existing language skills within companies are not always fully exploited.

This view is backed up by an internet survey quoted by Professor Connell where half of the 531 (self-selecting) respondents felt that they did not make use of the two or three languages that they could offer. (Connell, p.3, quoting a survey undertaken by LanguageAdvantage: www.languageadvantage.com)

Level of language capability

Where the level of language found in companies is concerned, a large proportion are at basic or intermediate level (intermediate being equivalent to GCSE level, taken two years before the final school leaving examination). For instance, 54% of employees in the SEMTA survey are said to have only a basic level of the language. In the e-skills sector, the position is slightly different with a higher proportion of employees with fluent and bilingual skills and a lower number with intermediate ones. In the North

West Region, 46.7% have language knowledge at basic or intermediate level and this statistic stands at 55% for both the North East and Yorkshire and Humberside.

The generally low level of competence in foreign languages may suggest that many companies are 'barely operating at a functional level in the language. In other words, the issue raised by the study is whether an increase in linguistic competence would necessarily increase trade'. The view of the report authors 'is that linguistic competence is one among many skills, but will increase competitiveness, particularly on entry to new markets' (SEMTA report p. 8).

However, both SEMTA and e-skills reports point to the fact that a variety of studies have established that in European companies based abroad: 'skills are found deeper in the company and more widely spread among the less senior echelons' (e-skills p. 12; SEMTA p. 11). The Wales report also notes that inward investors are better at languages (Wales p. 7).

A survey of 5000 students across Europe carried out by the education and recruitment group Hobsons, of which the results were published in 2002 found that British students were the least likely to say that they had the right skills to work abroad (36% as against 63% across the rest of Europe). This may in part be explained that almost half the British students said that they spoke no second language, whereas in Germany, Italy and Spain, the figure for those speaking a second language was about nine out of ten students (www.agr.org.uk/news/news_view.asp?news%5Fid=226).

The survey undertaken by the British Chambers of Commerce (May 2004, publication) shows that 89% of exporters who had studied languages in primary school and successfully pursued their studies, obtaining a GCSE 'O' level claim to speak at least one language (French 77%; German 33%; Spanish 16%). Among those who had not studied a language at primary school but who had obtained a GCSE 'O' level, 79% would have a good competence in at least one language (French 68%; German 32%; Spanish 19%). For those who had neither study experience at primary school nor a GCSE 'O' level, only 42% claim to speak a language (French 25%; German 13%; Spanish 6%). Such figures add further weight to arguments about the importance of studying languages at school and from an early age.

A mixed picture emerges from the above facts. There is increasing recognition of the role that languages must play in trade even if the language capability is not always there to underpin it. National deficiencies in languages are being supplemented with recourse to native speakers for a variety of tasks and functions.

4 In regard to language graduates (bachelor and master) outside language-related industries and professions, what formal or informal linguistic and intercultural qualifications – languages/ skills and competences - are known to enhance career prospects?

The qualifications and competences likely to enhance the career prospects of language graduates have sometimes to be deduced from the tasks and functions in which companies currently use language expertise, whether this is provided in-house or bought in.

A clear demand for translation and interpreting in business situations and transactions emerges from the surveys. 42% (SEMTA) or 31% (e-skills) point to recourse to external translators and/or interpreters. The North West report indicates that 57.8% of companies indicated that they used translators while in Yorkshire and Humberside the figure was 52.4% (North West Report p. 30), a figure which would include rare occasions as well as routine use. References to French, German, Spanish and Italian are frequent but the range cited includes across the companies: Bulgarian, Turkish, Thai, Czech, Slovak, Latvian, Lithuanian, Korean. Maltese and Haitian. (p 30), signalling the wide spread of markets now reached. Scotland also indicates use of translators and interpreters (Scotland 2001, update). The importance of precision in translation was stressed when one respondent spoke of deals going 'sour because some details were lost in translation'. (North West p. 30)

These figures for recourse to outside translators underscore the requirement for translation in a professional context which may be used either informally or professionally in companies. This conclusion was also found in a small survey of activities undertaken by a selection of language graduates from University of Ulster in the mid-nineties working in business (Lillie, unpublished survey for course development purposes, UU). In this latter study, graduates in small and medium enterprises indicated that even if not working directly with languages, they were at times called upon to translate or to interpret on account of their language competence.

Looking again at expertise which has to be hired in but which might also be usefully be provided by linguists working within a company, it is clear that interpreters have been taken on specifically for meetings and trade fairs. It may, therefore, be suggested that the ability to undertake professional sales discussion and negotiation are important skill areas for linguists.

Companies also seek training for their employees in cultural awareness and knowledge of this field is a further important area for linguists working in business.

It is also clear that students benefit in employment terms from undertaking the study of a professional area together with languages. At one level, there is a need for the recruitment of more secretarial linguists (North West Report p. 33). One company in the area notes, for instance, that they have recruited a secretary with French and German from university (North West Report p. 44).

There is a demand for students with qualifications in business studies and a language (v. for instance, the North West survey which speaks of the usefulness of students undertaking business studies with languages p. 53). It is obvious that there is (as one might expect) a major role for linguists in sales. Indeed one area where linguists are found in some concentration is indeed in sales departments (North West p. 30) and the same report cites the case of one company with five linguists in its overseas sales department. (p. 40). Another company mentions that one sales Support Manager was taken on for language skills and is now acquiring the necessary business skills (p. 43).

There is as well a need for linguists in other professional areas and functions, as the figures in the surveys have indicated, and these cover a range including scientific and engineering areas as well as IT, accounting and audit (cf. for instance North West

Report p. 57). For effective operation, language competence has to be good as is recognised in the North West Report ‘ you have to be exceptionally good in a language to cover technical aspects’ (p. 54).

Vacancies of jobs with languages may be posted on the BLIS Jobs database (a service for both candidates and employers). BLIS Services is a facility offered free of charge as a one-stop shop for businesses or individuals interested in the use and provision of services in language and cultural expertise. The database of jobs and people with languages is just one of the facilities offered. It is maintained and developed by CILT, the National Centre for Languages). The positions listed as vacant confirm the information from the surveys. The employment covered includes: financial analysis, accounts, sales and marketing (including a sales engineer), credit control, logistics, customer care and support, personal assistant, office administrator, telesales and telephone research as well as in-house translation. (www.blis.org.uk)

The existence of a national facility of this nature and its use by employers searching for linguistically competent staff is a very positive development.

5 Validation of learning, assessment, certification – what does the labour market recognise and value?

The labour market in the UK recognises the range of undergraduate and intermediate qualifications. At degree level the principal qualifications are BA and BSc (Hons). Traditionally, the labour market in the UK recruits graduates of any discipline, particularly for those likely to move into management positions in the future where they are seeking individuals of high calibre and potential. For particular tasks and functions, companies will look for graduates in specific areas such as accounting. They are also increasingly interested in graduates who come with the knowledge and skills that they need whether in sales, marketing or business studies so that their training is less costly.

At intermediate levels, there are a range of qualifications such as those covered by Edexcel (generally two years full-time professional diplomas or their part-time equivalent) and there are now also foundation degrees in certain professional areas (again these are two years full-time professional diplomas or their part-time equivalent).

The cognisance taken of other diplomas and supplements indicating language proficiency will to some extent depend on the individual employer and their needs. For instance, internships and study abroad would be one factor in the assessment of potential candidates and the weighting given to them would depend on the individual company’s particular needs and concerns.

While some employers would be familiar with additional certificates, this is not necessarily widespread. For instance, the Scottish survey indicated that only a very few companies were familiar with National Language Standards (17% p. 13). *(National Language Standards* were developed in conjunction with the *Languages National Training Organisation* and focus in the main on benchmarking languages for use in the workplace. They are mapped to levels as set out by the *Qualifications and Curriculum Authority* - this is the body established to act as guardian of school and vocational standards and qualifications and which works with others to develop and monitor the curricula concerned and associated assessment - and apart from the top levels are pre-degree. They focus very much on language skills as used in employment).

On a more hopeful note the North West reports that ‘the National Languages Standards and the European Language Portfolio are increasingly being used to good effect in recruitment, including some early successes in the North West’ (North West p.16).

In general, in recruitment, employers will look at their own needs and assess a candidate’s qualifications on a case by case basis.

6. Communication and co-operation between higher education institutions/ public authorities and the world of work (private and public employers, the social partners, professional associations etc) (at local/regional level; at member state level; at European level; consultation about division of labour)

Within the United Kingdom, there is consultation between government, its agencies and relevant stakeholders on a range of issues.

The example of the policy document: *Languages for All: Languages for Life: a strategy for England* (DfES 2002) illustrates practice at a national level within the UK. Following the publication of the Nuffield Report (*Languages: the next generation*, from the Nuffield Foundation, published May 2000 and itself the fruit of wide consultation with stakeholders), a Languages National Steering Group was established in 2001 to develop a strategy for languages, in order to change perceptions of foreign language learning and promote the view of ‘language competence as a key contemporary life skill’ (*Languages for All*, p. 2). This body contained representatives from the different sectors and levels of education, from specialist language bodies, from business and industry, from professional organisations and from governmental agencies. A green paper for consultation, *Language Learning,* was published in February 2002. Consultations were held with a spectrum of interested parties: schools, employers, HE, the youth service and the voluntary sector. In addition, a version specifically for young people was produced so that they might also be consulted. Following this the strategy was then evolved and published.

In a somewhat different area, the *Lambert Review of Business-University Collaboration* (December 2003), was set up to review aspects of Business University interaction (in particular in relation to science and technology transfer) and business views on university governance. Prior to the report’s publication, there was extensive consultation with the various stakeholders, including business, professional organisations, developmental agencies and areas of government.

Issues and policy development in a range of matters in the United Kingdom are thus implemented through reports based on existing studies and consultations with stakeholders.

Specifically in relation to languages, CILT, the National Centre for Languages has as its role the support of language teaching among learners of all ages, levels and backgrounds and it also provides expert advice to Government, business and education. CILT works, in particular with certain Regional Development Agencies in the creation of Language Networks. These exist, for instance in North West, North East, Yorkshire and the Humber, South West where the RDA's have 'committed financially to the development of a regional languages strategy and are investing in a Regional Languages Network to act as the catalyst and co-ordination function for that exercise'. RDA's in two further regions (South West, West Midlands) are giving funding support and support in kind (eg office space) as a first step in network and strategy development. (www.cilt.org.uk/rln)

Different sectors of business and industry are able to pinpoint skill and productivity needs through Sector Skills Councils and these needs include undergraduate and postgraduate levels of education. The steps taken to highlight language needs through audits and reports have already been discussed above in earlier sections.

A problem in relation to Sector Skills Councils is, however, pinpointed by the *Lambert Review*, which indicates that while these councils may in certain cases work with universities, it is not clear that there is currently a mechanism for SSC's to have a dialogue with universities, something which is liable to lead to frustration among employers and a failure to have an impact on addressing employers' needs. Accordingly Lambert recommends that the government should ensure that SSC's have real influence over courses and curricula (*Lambert*, p.110).

At regional level, it falls to the Regional Development Agency in each area of the country, working with a group of regional partners to address skills and employment needs in their particular area. They work frequently with universities in meeting the requirements of the local economy.

In the area of languages, The Regional language Network for Yorkshire and the Humber organised a meeting between 30 representatives form Higher Education and the economic development departments in April 2004 to enable better mutual understanding and developments in relation to language skills provision (www.rln-yh.com/lmi/lmi_meeting.pdf)

Increasingly, universities or consortia of universities consult and interact with the regional partners in their area through links with major local companies, through development agencies, chambers of commerce, NHS trusts and other community service providers. Many universities have developed corporate or business liaison offices with a specific remit to act as the interface with business, in relation, for instance, to consultancy and research (*Lambert*, p. 42). In the area of languages, for instance, some universities have outreach centres offering a range of language services and consultancy to business and other bodies in the wider community.

In vocational areas (but not necessarily in language degrees which are not generally regarded as courses training for a specific profession), it would normal practice to include a member of the appropriate professional or business community on course planning committees and validation/revalidation boards in universities (and this would be verified when the university is audited). However, in degrees offering professional qualifications in areas such as accountancy or business, often in conjunction with European university partners, it would be customary to have input from the professions concerned.

Within the context of the Graduate Apprenticeship (GA) scheme, launched by DfES in 1998 and designed to enhance the employment skills of new graduates, there have been some interesting initiatives. They were set up as schemes which combine existing HE qualifications with work-based learning, National Vocational Qualifications and Key Skills Units. In January 2000, the Graduate Apprenticeship National network was set up to provide a support network for the scheme. In languages, the University of Salford established GA's in Professional Linguists Work-based Postgraduate Assessment where, in addition to their university studies, the students undertook work experience in translation companies and gained certification in relevant areas of the National Standards in Translating. The GA in Language and Business Skills in the Workplace was aimed at undergraduates who followed a dedicated language course, preparing them for work abroad, where they compiled a portfolio that contributed to the NVQ (National Vocational Qualification). The University of Sheffield also put in place a GA in Translation (www.hefce.ac.uk/learning/GradApp)

6.2 Consultation and co-operation regarding higher education provision of continuing education (at local/regional level; at member state level; at European level)

The provision of continuing education within higher education in the UK is variously organised but seeks to respond to perceived needs among the catchment communities. Many of the skills deficits in languages have been highlighted in the language audits and reports previously discussed but in the flux and flow of life new demands and requirements constantly emerge. An understanding of the needs in relation to lifelong learning is part of the remit of the Sector Skills Councils (discussed above). There is increasing co-operation in the field of languages between bodies such as the Sector Skills Council and the Regional development Agencies which is leading to a better understanding of the linguistic needs of the workplace.

In establishing lifelong learning courses in languages, universities would normally take account of indicators of local need and approaches by professional, business and voluntary groups. In approving such courses, universities would habitually wish to satisfy themselves through their validation procedures that their provision responded to a genuine need and was viable.

Lifelong education is also provided in the UK through the University for Industry (Ufi). Ufi works as a public-private partnership in England, Wales and Northern Ireland and aims to 'put individuals in a better position to get jobs, improve their career prospects and boost business competitiveness' (www.ufi.com) Ufi's learning services are delivered through **learndirect** (www.learndirect.co.uk) which provides access to courses, 80% of which are delivered on-line, and which may be accessed at home, at work or in over 2000 **learndirect** centres. These courses tend to be at the more basic levels of attainment. In languages, French, German and Spanish are offered at Everyday - Beginner, Everyday - Beginner+, Everyday –Intermediate and Everyday – Advanced – all of which are online. There are also seven levels of EFL permitting non-native English speakers to improve their skills in the language. This initiative offers a valuable means of access to people seeking to improve their linguistic competence in a lifelong learning mode, although it in no sense covers the wide range of languages which have been seen to be in demand by business.

A major provider of lifelong learning at higher education level within the UK is the Open University. which offers part-time distant learning language courses from Beginners level upwards in French, German and Spanish. Students may obtain a certificate, a diploma or use their language units to help build up a degree within the OU modular structure.

7. Institutional, regional and national career services

(7.1 Types of surveys conducted among HE graduates; 7.2 Survey responses relevant to TNP 3; 7.2.1 Subjects/disciplines; 7.2.2 Linguistic and intercultural skills and competences, including issues raised under section 5; 7.2.3 Types of work; 7.2.4 Destinations; 7.3 Career advice relevant to TNP 3; 7.3.1 Subjects/ disciplines; 7.3.2 Linguistic and intercultural skills and competences including issues raised under section 5; 7.33 Types of work; 7.3.4 Destinations

In the United Kingdom, each university has a careers service which provides advice on relevant career opportunities to current students and to graduates of all disciplines including languages. These services hold relevant publications, give help with the process of application and interview and organise careers events with potential employers. University careers advisers interact with a national body, the Association of Graduate Careers Advisory Services (AGCAS) (www.agcas.org.uk) which offers a range of support for the work of advisers in individual universities as, for instance, through publications, through an outline of quality standards benchmarks and through training and development opportunities.

The Association of Careers Advisory Services has close links with the Association of Graduate Recruiters (AGR) (www.agr.org.uk) and work with them in the promotion of graduate opportunities. AGR is ‘an independent, not-for-profit organisaton dedicated to supporting employers in all aspects of graduate recruitment’ that represents ‘over 600 organisations that, between them offer a high proportion of graduate opportunities in the UK’ (www.agr.org.uk). Their web site includes recent news about a range of job-related information, initiatives and reports.

In common with other young Europeans, students in the UK also benefit from access to EURES (the European online job mobility portal) and from the Eurograduate database of jobs and opportunities (which also has French and German sites) (www.eurograduate.com

Each United Kingdom University is obliged to provide first destinations returns for its graduates to the Higher Education Statistics Agency (HESA) which publishes annual figures that serve to inform the work of government, educationalists and employers (www.hesa.ac.uk)

As the *Lambert Report* points out where individual universities are concerned, the employability data is published at university level rather than on a departmental basis and does not contain information about actual jobs or salaries. Lambert considers that: ‘this is not particularly helpful for prospective students. They would benefit from clear market signals which would include a batter picture of where graduates from a particular course find work and how much they earn’ (p.107). Accordingly the report has as one of its recommendations that this type of information be provided (p.108).

The HESA statistics do, however, permit a national overview of employment for broad subject areas and smaller categories within them. Languages is one of these areas and figures are also given for the individual languages studied. These statistics show that language graduates have better employment rates than a number of other disciplines (*Languages for All*, p.13). The favourable employment rate of language graduates is also underscored in other reports. Professor Connell, for instance, quotes an AGCAS report of 1999 which showed that the lowest unemployment figure was in graduates of French (Language, Literature and Culture): 3.5% against an aggregate of aall subjects of 6,9% (Connell, p. 15; AGCAS, CSU [Central Services Unit] &UCAS [Universities and Colleges Admissions Service] *What do graduates do?* 1999).

Keith Marshall has looked in some detail at the destinations of graduates based on the HESA statistics and other work. He showed that in 2000 after courses leading directly to a profession, language graduates come out as the most immediately employable group. Coming after Medicine, Dentistry and Veterinary Science and Education, French and German stood at 3.1% above Law, Architecture/Building/Planning. At 4.3% unemployment for Modern Languages as a whole was better than a number of other subjects such as: English (5.4%), Mathematical Sciences (5.4%), Biological Sciences (5.5%) Business Administration (5.5%), Humanities (6.1%), Engineering (6.8%).

The figures given by Marshall reveal the spread of employment among language graduates in the UK to be wide with the most favoured areas for new language graduates in 2000 being: Business services (31.9%), Manufacturing (12.2%), Banking/Finance (11%) Wholesale/Retail Sales (8.6%), Transport/Communications (8%), Community/Social/Personal Services (8.2%), Public Administration (6.2%), Education (5.6%), Health/Social Work (3%), Hotels and Restaurants (2.0), International Organisations (0.3%), Other areas (2.4%). Figures taken from his own university for the same year indicate a similarly wide spectrum of occupation, including, in particular, a range of business, accountancy and administration, teaching and some translation (Marshall, K (2001), *Making the case for languages*, www.lang.ltsn.ac.uk/resourcedownloads.aspx?resourcesd=1017&filename=7myths.rtf

CILT, The National Centre for Languages provides information and a range of documentation aimed at prospective students of languages and other stakeholders, showing the relevance of language learning in working life and the type of employment which graduates from language courses may expect to enter.

An important new initiative in the area of careers is ‘Languages Work’. This is a three-year project funded by DfES to develop careers information, advice and guidance material in the area of languages which CILT is leading for the department. Launched on the European Day of Languages in September, it targets ‘cascade agents’ working with young people aged 14+ to help put balanced information into their hands about the range of career opportunities both in and with languages (further information on this project may be found on the CILT website (www.cilt.org.uk)

Surveys of job opportunities in Europe or on young people in Europe are undertaken by various commercial firms as well as by researchers. In a survey, Eurograduate found, for instance, that European recruiters were often willing to offer high salaries to job seekers with high potential and also that increasingly companies wanted graduates to be able to speak three languages. (AGR website, report of 27/09/01 of Eurograduate survey www.agr.org.news).

A communications company – Pauffley – carries out an annual survey of current graduate recruitment practices across Europe with a view to enabling companies to benchmark their recruitment practices – a clear signal of how companies in Europe are seeking to recruit talent across the Union (www.pauffley.com). The concern to find the best European employees is also seen in the recruitment techniques of Mars reported by AGR to be targeting top European talent through the new recruitment brand name of Masterfoods and a new graduate training scheme – the European Management Development Programme (EuroMDO) (reported on 31/03/04 on the AGR website: www.agr.org.uk/news . See also www.euromdp.com)

Surveys undertaken among young people, employees or employers do not necessarily seek to ascertain levels of foreign language skill (eg Lacovou, M and Berthoud, R, *Young People's Lives: A map of Europe*, undertaken by ISER – Institute for Social and \Economic Research, University of Essex – www.iser.essex.ac.uk) and it may be suggested that this should perhaps be a more routine area for questions in studies of European young people, students, graduates or employees.

Language (and other) graduates in the United Kingdom benefit from solidly established careers services as well as from other sources of recruitment information. It is becoming ever more clear that employers in Europe are increasingly seeking out the best talent from across the Union as a whole and that they expect multilingualism at a good level of competence from their management track entrants.

8. Process recommendations: measures to be taken to bring about improved consultation and co-operation between higher education and the world of work (8.1 Measures to be taken at local / regional level; 8.2 measures to be taken at Member State level; 8.3 Measures to taken at European level)

In the United Kingdom, part of the problem resides in the reluctance of certain elements within the population to take the learning of languages as seriously as should be the case within the EU. There are, of course, many examples of good practice but there has not been a constant tradition of seeing language competence as an essential skill for employment. All too often the management teams in companies do not offer good role models in respect of language knowledge and do not see the necessity for promoting this type of competence as a necessary part of pre-employment education. On the other hand, there is no doubt that many management teams across the country are fully cognisant of the importance of languages and their essential role in the export trade. Much positive interaction is now taking place between Regional Development Agencies and representatives from Higher Education and CILT and there is an increasing concern to set in place an approach looking more fully towards Europe and the world beyond.

It is unfortunate that at a time when globalisation demands extensive language skills the financial market-led models on which universities currently operate encourage the shedding of subjects with lower numbers. This may mean dropping less widely studied languages which are nonetheless needed by industry in its export drives. At an earlier level of education, performance league tables of results in schools may also discourage widespread take-up of languages, despite this being a crucial stage for language learning.

One the one hand, there has been considerable support and interest in languages on the part of government with the elaboration of a languages strategy and continued monitoring of its implementation. However, in the short term at least, other areas of government policy including the increased optionality of languages within the curriculum are further serving in the short term at least to reduce the take up of languages within national qualifications. Further incentives are needed to encourage young people at school to pursue the study of languages up to the final school years. There should also be an adaptation of norms for measuring school performance so that credit is given for pupils taking a spread of work and continuing with so called ‘difficult’ subjects. There should also be greater recognition of the importance of maintaining a spread of languages within universities with concomitant funding so that there are more tangible benefits for institutions to offer languages despite inevitably low cohort sizes in some cases. Interestingly, the paper *Languages for all: from Strategy to Delivery* indicates that government is working with languages on the funding of languages. It will be important that a funding model is developed which offers better support for a range of language learning activities in Higher Education.

It is encouraging to note that the DfES has commissioned a small piece of research as part of the implementation plan for the National Languages Strategy in the HE phase. The research has three strands: data analysis of HE take-up for languages 1997-2002, specialist and other, and any identifiable trends; analysis of the consequences of having ‘international’ in a department, degree, module or other title; and a report on interviews in a selected sample of six HEI’s (Higher Education Institutions), from the most senior level to lecturers in language departments and centres. The report, due for September 2004, is likely to remain confidential to the Department who have asked for recommendations to help shape action.

At a European level, there might be a specific channel/project to look at the needs of companies in the linguistic sphere in relation to languages and including languages other than English. This might be done in relation to global as well as inter-European trade.

9. Process recommendations: measures to be undertaken to survey higher education graduates and to provide careers advice in regard to linguistic and intercultural competence (9.1 at institutional level; 9.2 at Member State level; 9.3 at European level)

Although some work has already been done in the area in the UK, departments of languages should gather more specific details about the careers of their graduates once they have entered employment; how they use their languages and the type of study in languages that they would have found useful. In particular it would be useful to research the careers of graduates leaving university with joint degrees in say business and languages or law and languages.

Many of the surveys of languages in business in the UK seem to have been of a general nature where respondents made an estimate of level or use. In each member state there might be a survey of graduates with languages at third degree level (not necessarily full degrees in languages) who are not working in education to discover what use they make of their languages and their views on how their education in languages might have been made more beneficial to them. A survey might also be undertaken of management staff in European / international organisations to ascertain how they used languages; the level at which they used them; the tasks for which they currently use them; the activities in which they might usefully engage were their language competence better.

10. Initial overarching recommendations regarding learning outcomes and academic profiles (10.2 of non-language graduates; 10.3 of language graduates - at bachelor level and at master level)

10.2 Non-language graduates

These students require language study which targets the types of activity in which they are likely to have to engage in their working lives, including different types of interaction, presentation and discussion; a good ability to read the target language and a knowledge of where to seek linguistic information as well as other material about the target country. They need to be acquainted with key concepts regarding target country culture and ethos, together with some understanding of interculturality and the problems that may arise when communicating across different cultures.

Many examples exist of universities that offer languages on institution-wide programmes that allow languages to be taken at a range of levels alongside the student’s main field of study. While recognition is given for the completion of such work, the results do not impact on the classification of the student’s main field of study. Interestingly in a survey undertaken of such a programme in the London School of Economics as part of a wider DfES survey aimed at gaining a more accurate picture of the number of students taking a vocational language course at university, a number of students interviewed indicated that they preferred the language wide option to languages as part of a degree course where it might (adversely) affect their degree classification. (Heyworth, J, Alonso Garcia, I, Giovanetti, D, *Mapping of Professional and Vocational Routes in Languages*, LSE, 2004)

10.3 Language graduates (at bachelor and master level)

In the UK at least, language graduates may enter a range of professions and learning outcomes may vary depending on the career which the students are seeking to enter. Students of languages should be introduced to a rounded range of skills in their target language including skills of discussion, interaction, negotiation, translation and basic interpreting and as well as reading and writing skills, even if, depending on the degree, some of these skills may be studied in more depth than others. Students will also have a range of options in language studies which may include society, culture and literature. In addition, they will be equipped with the skills to extend their language learning further either in the same or in a new target language and they will have an understanding of intercultural issues. Ideally all students of languages should have the opportunity to spend a period of studying or working in their target language country or countries. Within the United Kingdom, the benchmarks for the study of languages indicate that activities such as the above should figure in language courses, although the totality of activities are not necessarily to be found in any one course.(For the benchmarks in languages and related studies, see: http://www.qaa.ac.uk/crntwork/benchmark/phase2/languages.htm)

11. Initial recommendations regarding validation of learning, assessment and certification of linguistic and intercultural skills and competences (11.2 measures to be taken at institutional level; 11.3 measures to be taken by employers; measures to be taken at Member State level; measures to be taken at European level)

While the European Language Portfolio exists as do the levels of attainment of the Council of Europe, as well as recognised language proficiency examinations within particular countries, there is really no common European certificated examination whose levels would be immediately recognised throughout the Union. Perhaps Europe could launch a scheme whereby countries, and within them individual institutions and other bodies, might see their qualifications benchmarked to European standards. This would mean that a potential employee with a particular examination and level in a specific country could indicate a defined stage of attainment that would be clearly understood throughout the Union. A European working group with representatives from key providers in individual countries should take this forward.

12. Needs for future projects, studies and research (12.2 projects to be undertaken at 12.2.1 Member State level; 12.2.2 European level; 12.3 Studies to be undertaken at 12.3.1 local/regional level; 12.3.2 member State level; 12.3.3 European level; 12.4 research to be undertaken at 12.4.1 member State level; 12.4.2 European level)

At member state level, the careers of different sets of graduates should be tracked to find the use they make of languages; graduates with language study in their degree whether the language was taken as a main subject or together with another, probably professional area, but who do not work in education; and graduates (of any discipline) working in management track positions in international corporations or smaller companies known to be active internationally (as already discussed in section 9 above).

Building on the excellent work already undertaken in the UK, it would be useful to quantify language needs with greater precision whether at regional or other levels. In addition, there is a need to obtain more extensive information so as to ascertain the likely demand for lifelong learning courses in languages other than those commonly taught. Such a survey should also consider the model that companies might most realistically take up – would this be drip feed weekly sessions; intensive courses in the home or target countries; online material; blended learning.

Within the UK at least, there has been a decline in the numbers of students taking language degrees at a time of the introduction of fees and rising costs involved in higher education study. It would be useful to see (and not only in the UK) the impact that financial considerations have on student decisions in relation to language study. Interestingly, there is at least an implicit recognition on the part of government of the financial situation in the report *Languages for all: from Strategy to Delivery*, where it is indicated that the development of sponsorship is being explored with public and private sector employers to ensure that enough young people become linguists and receive adequate reward if they do so.

Member States or Europe might consider offering a competitive scheme to which current students could apply and which would offer them adequate funding to pursue an intensive language course in a new language or one which was only held to a low level of proficiency, either another European language or one from outside Europe that might be useful for future European trade or the provision of European services in a globalised market.

Research should be undertaken into actual language usage in the workplace. Beyond the broad statements that language is used in particular situations (eg sales discussions), an understanding is needed within individual languages of the language actually used in particular situations – what sort of expressions and terms are being deployed in real life trade discussions in French; German; Spanish etc workplaces? It would be very valuable to research and build up an understanding of language needs by occupational profile. To teach situational language more effectively and in a more focused way, language educators need a better understanding of the reality of what happens in target language workplaces in particular areas of work.

Annexes

A Examples of good practice

Details of these examples are largely contained within the report. The following may be highlighted in particular:

1. The Languages Ladder (described in , a voluntary recognition scheme that will complement national qualifications frameworks and the Common European Framework. See DfES website: (www.dfes.gov.uk/languages/DSP_languagesladder.cfm) and *Languages for all: from Strategy to Delivery*, Department for Education and Skills, 2004)
2. The key role played by CILT, the National Centre for Languages, in the support and promotion of languages, centrally, through its regional activities, its cooperation with Regional Development Agencies and language networks and in its many initiatives in support of language study.
3. The language capacity audits and sectoral analysis for SEMTA and e-skills
4. BLIS jobs database
5. The provision of languages on institution-wide schemes, enabling languages to be taken at different levels in conjunction with a another area of study (as for example in LSE but also in other universities)
6. Language consultancy units within universities offering language services to business and other employers (eg in University of Ulster and also elsewhere)

7. Use of the Graduate Apprentice Scheme, enabling greater cooperation with work providers, as in the University of Salford
8. Provision of part-time language courses through distance learning by Open University
9. 'Languages Work'. A three-year project funded by DfES to develop careers information, advice and guidance material in the area of languages and led by CILT. (www.cilt.org.uk)

B Links and useful addresses

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www.iser.essex.ac.uk (report 'Young People's Lives' but does not give information in relation to languages)
www.rln-yh.com/lmi/lmi_meeting.pdf
www.hefce.ac.uk/learning/GradApp
www.dfes.gov.uk/languages/DSP_languagesladder.cfm
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