



## Labour Market Intelligence: Languages and Intercultural Working 2012

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## Foreword

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This report examines Labour Market Intelligence (LMI) for **Languages and Intercultural Skills** and explores the demand from employers for language professions and related skills.

The report draws on data from:

- Government reports such as the National Employer Skills Surveys in England (2009), Northern Ireland (2008), Scotland (2010) and Wales (2005)
- commercial survey reports
- Government datasets, such as the 2009 Labour Force Survey
- National Statistics datasets and reports
- surveys and reports by Sector Skills Councils (SSCs)
- education and skills surveys by employer representative organisations, such as Confederation of British Industry (CBI) and British Chamber of Commerce (BCC)

This report presents a summary of language and intercultural working skills across the UK. It looks at:

- the current picture of the workforce using language and intercultural working skills across the UK
- the challenges and skills-related issues facing employers
- the skill shortages and gaps reported by employers
- the consequences of skills gaps and shortages
- future skills gaps and projections.

The principal purpose of this report is to provide an analysis of the labour market for Languages and Intercultural skills across the UK and within each of the four Nations: England, Northern Ireland, Scotland and Wales. It also reviews factors influencing the labour market, such as government policies across the UK.

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### Scope of the research

The aim of this report is to provide an up-to-date analysis of language and intercultural skills in the UK. It draws on a range of national, regional and sectoral secondary data sources to ensure that an accurate picture is reported.

The key sources referred to in this report include, but are not limited to:

- government reports:
  - National Employers Skills Survey in England (NESS) 2009
  - Scottish Employer Skills Survey (SESS) 2010
  - Northern Ireland Skills Monitoring Survey (NISMS) 2008
  - Future Skills Wales Sector Skills Survey (FSW) 2005
- the Office of National Statistics (ONS)
- the Data Services statistics
- NOMIS
- Department for Employment and Learning (DELNI)
- Skills Development Scotland (SDS)
- Welsh Assembly Government (WAG)
- CBI Education and Skills reports
- sector-specific research.

### Definition of languages and intercultural working

Language and intercultural working skills can help individuals or organisations from diverse cultures or different countries communicate more effectively.

There are three categories of occupations requiring languages and intercultural skills.

- Occupations which require languages and intercultural skills as essential to the role (e.g. translator, interpreter, intercultural skills trainer).
- Occupations which require competence in languages or intercultural skills in conjunction with another sector specific skill (e.g. international contact and call centre handling, IT helpdesk, sales director, bilingual PA, tourist representative) for effective performance.
- Occupations where language or intercultural skills are not a key requirement of the role, but where their availability or ability to be applied has the capacity to add value to the job role for the employer, employee or customer e.g. journalist, property agent, hotel worker, retail worker, catering staff.

### Economic importance of languages and intercultural skills

A body of research has shown the importance of language and intercultural skills in facilitating international trade. While the global currency of English is strong, and the UK continues to get by in the short term with low levels of competence in other languages by relying on others being able and willing to speak English, evidence suggests the UK is missing out on a wealth of opportunities for international trade. English is already losing its prominence as the online language, with just 29 per cent of all language use on the Internet in 2009.

Where English is the language of its customers, the UK is able to export more than it imports. Yet, where the first language of a market is a language other than English, the UK buys more than it sells, suggesting that international communication is an important

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factor in building a trade advantage. Recent research<sup>1</sup> estimates that the current cost of the UK's underinvestment in language skills is in the range of £7.3 billion and £17 billion, or 0.5 to 1.2 per cent of GDP. It also suggests that, while a lack of foreign language skills may not always lead to direct losses, it may dissuade businesses from entering new markets.

Specialist training in intercultural working skills can help managers and supervisors develop their competence in managing a diverse workforce. Furthermore, developing intercultural skills in all sections of the workforce improves team work and enhances an organisation's internal culture, which in turn may stimulate innovation and increase productivity. Research indicates that individuals with language skills or international experience, in any sector or discipline, demonstrate intercultural understanding and sensitivity that adds value to any society.

A number of studies over recent years have pointed to different aspects of UK underperformance in the use of language and intercultural skills. Too few employees have the necessary global communication skills, linguistic and intercultural, to be able to engage fully in international business. Similarly, too few employers ensure their employees are gaining the language and intercultural working skills required to support them in their job role, for reasons of both finance and time.

### Profile of the sector

There are also a range of occupations which require specialist language knowledge, e.g. interpreter, teacher, translator or cultural trainer. Interpreting and translation services are used extensively by the private and public sector, in a diverse range of languages and language combinations. They provide economic and social benefits to the UK. Languages are taught in all phases of education in the UK, and various routes to achievement and accreditation are available. Language and intercultural training are accessed by all sectors of the UK workforce.

In addition to specialist roles, research indicates that languages and intercultural skills are used in a very wide range of professions and at all skills levels. Job roles that benefit from an individual with language or intercultural skills have been reported in many sectors, including finance, manufacturing, IT, hospitality, tourism, travel and transport, retail, media, local and national government and health and social care. Indeed, all sectors report a high demand for languages and intercultural skills in customer facing roles.

There are varying degrees of regulation in the sector. Some areas of the public services require interpreters to be members of a professional register, but this is not uniform across the public sector. There is no regulation of interpreting and translation in the private sector, and employers are free to set their own entry requirements. Language teaching in primary, secondary and further education is subject to the same regulation as other subjects, but private language training and intercultural training is not subject to formal regulation.

### Supply of language skills

There has been a decline in the numbers learning languages in schools across the UK. Numbers taking GCSE and A-level qualifications in a foreign language have been

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<sup>1</sup> University Council of Modern Languages (UCML), 2011, Labour Market Intelligence on Languages and Intercultural Skills in Higher Education.

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declining in England, Northern Ireland and Wales since languages were made optional in Key Stage 4 in 2004, with the decline in A-levels beginning at the start of this century. Numbers taking Standard and Higher Grades in Scotland have also declined over recent years.

In further and higher education, languages courses are being cut. Recent research indicates that languages in further education have witnessed a significant decline, with few vocational courses offering a language element. In higher education, university language departments are also experiencing widespread cuts and closures, diminishing the supply of language learners in the UK. While government policies are being introduced to try and reverse this decline in the UK education system, experienced teachers and lecturers are losing their jobs, reducing the number of educators in the system, which could create problems if numbers of learners increase dramatically.

A range of external factors also have a bearing on supply of language skills. Government policies, the global economy and an increasingly mobile global workforce all combine to have an effect on the range of languages available in the UK workforce. But surveys of employers tell us that language and cultural skills are still in high demand at all levels, and that shortages and gaps do exist.

### Employer satisfaction with language and intercultural skills

According to research by the Confederation of British Industry<sup>2</sup>, the level of satisfaction with the foreign language skills offered by school and college leavers has fallen, with 27 per cent of employers satisfied with leavers' language skills in 2010, and 23 per cent in 2011. In 2010, 44 per cent of employers were satisfied with the level of international cultural awareness among school and college leavers, but this fell to 37 per cent in 2011.

While employers exhibit higher levels of satisfaction with the skills of graduates, there is still some scope for improvement. Only 36 per cent of employers were satisfied with the foreign language skills of graduates in 2011, a fall of 6 per cent from the previous year. More (50 per cent) were satisfied with the international cultural awareness of graduates, but this was also a 6 per cent fall from the 2010 figure.

78 per cent of organisations report that foreign language skills will provide some benefit towards their organisation now and in the future:

- 8 per cent said the ability to speak one or more foreign language is an essential core competence for their business
- 11 per cent said it provides help when building relationships within their organisation
- 11 per cent said it assists their staff mobility
- 21 per cent said it is a beneficial skill but not when recruiting
- 27 per cent said foreign language skills will become important over the next couple of years.

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<sup>2</sup> Confederation of British Industry (CBI), 2010, Ready to Grow: Business priorities for education and skills, Education and skills survey 2010. & Confederation of British Industry (CBI), 2011, Building for Growth: Business priorities for Education and Skills, Education and Skills Survey.

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### Demand for language skills

In 2010, 65 per cent of employers reported that they were looking for conversational ability rather than full fluency.<sup>3</sup>

Despite suggestions that we are teaching and learning the wrong languages, employers surveyed in 2011<sup>4</sup> report that European languages are still those that are most beneficial to their business. French and German consistently come out on top in every employer poll. The popularity of European languages with employers is hardly surprising when we consider that the European Single Market is significant trading bloc for the UK, with Germany, the Netherlands and France in our top five export markets. The Netherlands and Germany are the largest growth markets for UK food and drink products, and Scotland has seen a significant increase in exports to the Netherlands in recent years. This could explain why Dutch was the fifth most requested languages by graduate employers last year. It is also significant that the same research indicated that 16 per cent of all job roles requiring language skills advertised between November 2010 and February 2011 required French or German in a sales or trading role.

In addition to the popularity of European languages, employers are increasingly looking for languages such as Mandarin Chinese or Russian, to support them in trading with these important global economies.

There is still a significant demand for highly skilled linguists as well. International organisations such as the European Commission, European Parliament and the United Nations are already reporting a severe shortage of English native speaker translators and interpreters. This shortage is expected to become more acute in future, as the number of language learners falls. The UK Government are also concerned at the level of influence the UK can exert in negotiations and discussions at European level, as the UK is also underrepresented in the European institutions at administrative and managerial level.

However, the decline in the number of language learners in the UK could have a major impact on future demand, particularly if we consider that in-demand German is the language that is currently experiencing the most significant decline in schools and universities.

### Mobility

Lack of language and intercultural skills may also have a negative impact on an individual's mobility in the job market. A recent survey of 2700 businesses<sup>5</sup> reported that only 35 per cent of employers would send a member of staff overseas to work, in part influenced by the lack of language skills on offer in UK employees. Lack of confidence in language skills is also a barrier to UK participation in European work experience. The UK has seen a decrease in the number of students going abroad for work placements in comparison to other European nations. This means that UK students are losing out to their European counterparts, who are accessing far greater international opportunities in the job market.

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<sup>3</sup> Confederation of British Industry (CBI), 2010, Ready to Grow: Business priorities for education and skills, Education and skills survey 2010.

<sup>4</sup> University Council of Modern Languages (UCML), May 2011, Labour Market Intelligence on Languages and Intercultural Skills in Higher Education.

<sup>5</sup> Regus (2012). Business survey

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### Conclusions

Research across the UK indicates that the demand for language skills has increased since 2007 and shows no sign of falling in the near future. It is important to reiterate the value of languages and intercultural skills to the UK both economically and socially to ensure that the UK is not left behind the rest of the world.

At the same time, the number of language learners is decreasing. Governments across the UK are introducing policies to try and stimulate the number of language learners and improve achievement and performance in language and intercultural skills. Employers, and the labour market intelligence they offer us, play an essential role in making the case for learning languages and developing intercultural skills. It is their voice, and the evidence that they increasingly need a wide range of languages at varying skill levels, that we must capture and convert into national occupational standards, qualifications, training programmes and careers guidance.

Languages and intercultural skills are important for microbusinesses to multinationals.

The lack of language skills at secondary, tertiary and research levels will affect the UK's ability to compete effectively in a global market and to promote UK interests in a global context. The UK therefore needs to devise a coherent strategy to improve language and intercultural skills at all skill levels.

# 1. Introduction

## 1.1 Defining 'Language' and 'Intercultural Working'

Language skills enable individuals and organisations to communicate with other individuals or organisations. Languages can be used in any of four skills: listening, reading, speaking and writing. They can be useful at all levels, from basic and elementary knowledge to full fluency, depending on the job role.

Intercultural working skills can help individuals or organisations from diverse cultures or different countries communicate more effectively. They indicate:

- an awareness of other cultures and how their customs, society, political and religious beliefs may affect business and social behaviour
- an understanding of your own culture and how it affects your attitude and your ability and willingness to adapt your business practices.

Language and intercultural working skills can be defined in many different ways, including:

- specialist (translation, interpreting, intercultural consultancy, teaching with a language specialism)
- transferable (general communication and influencing skills)
- adding value (sales, trading, exporting, negotiating)
- underpinning (where languages or intercultural skills are just one of the specialist skills required by the job role e.g. bilingual PA, cultural trainer)
- pan-sector (where languages or intercultural skills can be applied in any job role requiring contact with individuals or organisations from diverse cultures or different countries e.g. manager, supervisor, customer service representative).

There are three categories of occupations requiring languages and intercultural skills.

- Occupations which require languages and intercultural skills as essential to the role (e.g. translator, interpreter, intercultural skills trainer).
- Occupations which require competence in languages or intercultural skills in conjunction with another sector specific skill (e.g. international contact and call centre handling, IT helpdesk, sales director, bilingual PA, tourist representative) for effective performance.
- Occupations where language or intercultural skills are not a key requirement of the role, but where their availability or ability to be applied has the capacity to add value to the job role for the employer, employee or customer e.g. journalist, property agent, hotel worker, retail worker, catering staff.<sup>6</sup>

## 1.2 The importance of language and intercultural working

There is a large body of research that recognises the important contribution of language and intercultural skills to the UK, both economically and socially.

### 1.2.1 Economic importance

Research has shown the importance of language and intercultural skills in facilitating international trade. Findings from the Regional Language Skills Audits between 2000 and 2004 revealed that employers were losing business through inadequate international

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<sup>6</sup> CILT, the National Centre for Languages, 2008a, Labour market intelligence for the qualifications strategy for foreign languages and intercultural skills, page 15

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communication, and that linguistic and cultural factors generally tended to influence business transactions. In many cases, the choice of export market was determined by the language capability of senior staff rather than the regions of the world where business might profitably be pursued.<sup>7</sup> Moreover, there is a common perception with UK employers that 'English is enough'. There is strong evidence to suggest that this reliance on the dominance of English as the world language was costing the UK in terms of lost orders and missed opportunities.<sup>8</sup>

While the global currency of English is strong, and the UK continues to get by in the short term with low levels of competence in other languages by relying on others being able and willing to speak English, evidence suggests the UK is missing out on a wealth of opportunities for international trade. Where English is the language of its customers, the UK is able to export more than it imports. Yet, where the first language of a market is a language other than English, the UK buys more than it sells, suggesting that international communication is an important factor in building a trade advantage. Recent research estimates that the current cost of the UK's underinvestment in language skills is in the range of £7.3 billion and £17 billion, or 0.5 to 1.2 per cent of GDP.<sup>9</sup>

Indeed, the key to securing a contract may be as simple as developing an understanding with the client, which is more easily done with a basic knowledge of the client's language or an appreciation of their culture. In this complex and competitive global market, UK business cannot rely on language skills alone to maximise new opportunities. Intercultural competence can also help UK businesses form and develop successful relationships with clients, staff and suppliers.<sup>10</sup>

CILT's 2006-2007 consultation on the development of National Occupational Standards for Intercultural Working highlighted how UK productivity may be adversely affected by poor intercultural skills. Globalisation has stimulated migration, which has led to an increase in the number of multicultural and multilingual workforces worldwide. In the UK, ONS estimates that the number of non-UK born people in employment is 4.04 million people compared to 25.09 million UK-born people.<sup>11</sup> This relatively significant proportion of 'foreign born' workers has led to a number of new challenges related to the management of a diverse workforce. The need for intercultural skills will become increasingly important if the rising trend in non-UK born employees continues. The 2006/7 consultation also highlighted the importance of intercultural working skills to employers in helping migrant workers integrate more easily into employment and the local community.

Specialist training in intercultural working skills can help managers and supervisors develop their competence in managing a diverse workforce. This in turn can improve the skills of UK managers, who compare poorly against their international competitors.<sup>12</sup>

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<sup>7</sup> CILT, the National Centre for Languages, 2008a, Labour market intelligence for the qualifications strategy for foreign languages and intercultural skills, page 53

<sup>8</sup> CILT, the National Centre for Languages. 2005a. Talking World Class: The impact of language skills on the UK economy, page 11

<sup>9</sup> University Council of Modern Languages (UCML), May 2011, Labour Market Intelligence on Languages and Intercultural Skills in Higher Education, page 8

<sup>10</sup> The Nuffield Foundation, 2000, Languages: the next generation. The final report and recommendations of the Nuffield Languages Inquiry.

<sup>11</sup> Office for National Statistics, (ONS), May 2011, Labour Market Statistics.

<sup>12</sup> UK Commission for Employment and Skills (UKCES), 2010, Develop Leadership and Management Skills through Employer Networks.

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Furthermore, developing intercultural skills in all sections of the workforce improves team work and enhances an organisation's internal culture, which in turn may stimulate innovation and increase productivity.

### 1.2.2 Social importance

*'In the knowledge society of the 21st century, language competence and intercultural understanding are not optional extras, they are an essential part of being a citizen'*

**National Languages Strategy 2002**

In response to The Nuffield Foundation's (2000) report into the future of language skills needs, the Government produced a National Language Strategy for England<sup>13</sup> in 2002. The strategy aimed to transform the country's capability in languages by:

- improving teaching and learning
- introducing a recognition system i.e. the Languages Ladder<sup>14</sup>
- increasing the number of people studying languages in school and beyond.

The Strategy recognised that language skills are central to breaking down barriers within England and with other nations.

However, the coalition government withdrew its support for the Strategy when it came to power in May 2011 and is reviewing other methods of stimulating language learning and achievement. There is no longer any central funding available to support schools and colleges in promoting and developing language learning.

Other research indicates that individuals with language skills or international experience, in any sector or discipline, demonstrate intercultural understanding and sensitivity that adds value to any society.<sup>15</sup>

Interpreting and translation as professions also make a significant contribution to society. As a recent report by the European Commission<sup>16</sup> stated:

*'We cannot be confident of justice and equal treatment unless we are sure that every party to a criminal investigation or a trial fully understands and participates in the proceedings'*

The same can be applied to other areas of public services, and the report recommends that the right to translation and interpreting is guaranteed as an essential condition of fair and equal treatment.

### 1.2.3 The barriers and how to move forward

Recent research indicates that UK business held a complacent view of the importance of languages based on the position of English as the world's business language and that the UK needed to dramatically develop its capability in language skills if it was to continue to

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<sup>13</sup> Department for Education and Skills (DfES), 2002, National Languages Strategy: languages for all, languages for life, A strategy for England.

<sup>14</sup> The Languages Ladder is a national recognition scheme developed to credit language learning achievement at all levels. It is based on a series of 'can do' statements which describe what competence looks like at various stages of learning, from Beginner to Mastery. There are six stages in total with the first four further divided into three smaller steps.

<sup>15</sup> British Academy, 2011, Language Matters More and More: A position statement.

<sup>16</sup> European Commission Special Interest Group on Translation and Interpreting for Public Services, 2011, Final Report.

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be successful in the global economy<sup>17</sup> and grow its export markets<sup>18</sup>. Recent calculations indicate that only 6 per cent of the world's population speaks English as a first language and 75 per cent of the world's population speaks no English at all.<sup>19</sup>

A number of studies over recent years have pointed to different aspects of UK underperformance in the use of language and intercultural skills. Too few employees have the necessary global communication skills (linguistic and intercultural) to be able to engage fully in international business. Similarly, too few employers ensure their employees are gaining the language and intercultural working skills required to support them in their job role, for reasons of both finance and time.

Surveys have demonstrated that UK business performs relatively poorly compared to its European counterparts in respect of language strategies, recruiting staff with language skills, buying in professional language services, translating websites and contemplating new markets. These latent skills gaps and shortages in relation to foreign languages are hampering business transactions and leading to loss of business.<sup>20</sup>

Although starting from a relatively low base, there is also evidence that there has been an increase in employer perceptions of skills shortages and skills gaps.<sup>21</sup> The Dearing Review in 2006<sup>22</sup> noted that 'a one menu suits all approach to secondary languages is not working for many of our children. The suitability of language qualifications for employment may be one of the causes of this perceived skills gap.

There is evidence that large and multinational companies in the UK have better developed language capacity<sup>23</sup> although research did indicate that such companies were less responsive to the language needs of their business partners, were less likely to include international communication in their strategic planning process and were less agile in their use of language management tools than their French and German counterparts.

The lack of language skills at secondary, tertiary and research levels will affect the UK's ability to compete effectively in a global market and to promote UK interests in a global context.<sup>24</sup> The UK therefore needs to devise a coherent strategy to improve language and intercultural skills at all skill levels.

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<sup>17</sup> University Council of Modern Languages (UCML), 2011, Labour Market Intelligence on Languages and Intercultural Skills in Higher Education.

<sup>18</sup> Regus survey, January 2012

<sup>19</sup> Scottish Centre for Information on Language Teaching (SCILT), 2011, Modern Languages Excellence Report.

<sup>20</sup> CILT, the National Centre for Languages/Interact International, December 2006, ELAN: Effects on the European Economy of Shortages of Foreign Language Skills in Enterprise.

<sup>21</sup> CBI, 2011, Building for Growth: Business priorities for Education and Skills. Education and Skills Survey.

<sup>22</sup> Department for Education and Skills (DfES), 2002, National Languages Strategy: languages for all, languages for life. A strategy for England.

<sup>23</sup> CILT, the National Centre for Languages. 2005a. Talking World Class: The impact of language skills on the UK economy.

<sup>24</sup> British Academy, 2009, Language Matters: A position paper.

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### 1.3 Scope of the research

The aim of this report is to provide an up-to-date analysis of language and intercultural skills in the UK. It draws on a range of national, regional and sectoral secondary data sources to ensure that an accurate picture is reported.

For the full list of sources, please see the bibliography in section 11.

#### 1.3.1 Methodology

This report is prepared using secondary data sources only. The report includes information collected or published since 2008, when the last UK-wide LMI was published. The most recent or valid secondary information sources have been used where possible.

#### 1.3.2 Methodological issues and information validity

Methodological issues encountered during this research are set out below:

##### 1.3.2.1.1 Consistency in terminology

This report presents labour market information for the four nations: England, Scotland, Ireland and Wales. Attempts were made to identify research data across the four nations which used the same measurement parameters. For this reason, this report uses data from the UK Commission for Employment and Skill (UKCES) and their national skills surveys: the National Employers Skills Survey in England (NESS), the Scottish Employer Skills Survey (SESS), the Northern Ireland Skills Monitoring Survey (NISMS) and the Future Skills Wales Sector Skills Survey (FSW). However, inconsistencies in the questions asked and survey structures do exist across the four nations. Inconsistencies are referenced where relevant. Where additional reports were used, attempts were made to ensure that the definition used was consistent with the UKCES definitions.

##### 1.3.2.1.2 Time limits on data

When identifying suitable research data, the most up-to-date reports and statistics were selected as far as possible. However it should be noted that comparisons across the UK Employer Skills Surveys will be limited as the date of each survey is different. The statistics for Wales (FSW, 2005) presents specific methodological concerns as it was undertaken before the recession in 2008. There are also concerns for the NISMS (2008) report where field work was undertaken during the beginning of the economic downturn and thus the full impact of the recession may not have been realised. However, other, more recent, data sources will be used to ensure a reflection of the current economic climate. Each reference source is dated with the month or year of publication/validity.

#### 1.3.3 Sectors

There are many different ways of understanding and describing the range of activities in which employers engage. In this report, business sectors are described in two ways:

- by classification into Standard Industrial Classifications
- on the basis of Sector Skills Council (see Appendix 2).

It is important to note that the extent to which there is an exact fit between SIC 2003 codes and SSC footprint varies between SSCs. In some cases defining SSCs by SIC codes excludes certain elements of the SSC's footprint, so both methods are referred to in this report.

## 1. Introduction

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Moreover, when looking at the data on the Sector Skill Councils (SSCs), it should be noted that some SSCs have been removed from the table or the name has been changed to reflect a new organisation. The relevant SSCs are outlined below:

- Lifelong Learning UK closed on 31st March 2011, and some responsibilities have transferred to the Learning and Skills Improvement Service (LSIS)
- Government Skills ceased to exist on 1st April 2011
- Skillfast merged with Skillset in 2011
- People 1st and GoSkills SSCs merged on 4 July 2011.

### 1.3.3.1.1 Definitions

Unless otherwise specified, 'languages' refers to all languages, including sign languages.

## 2. Profile of the Workforce

### 2.1 Sector Profiles

#### 2.1.1 Interpreting and translation

This sector is made up of two overlapping occupational groups: interpreters and translators. Many individuals in this sector work on a self-employed or freelance basis for language service providers<sup>25</sup> who in turn market their services to a very diverse range of clients. Many providers specialise in providing interpreting and translation services to specific sectors e.g. legal, IT. Others will provide a range of language services for businesses and other organisations in the UK and overseas.

Some of the larger language service companies will employ in-house interpreters and translators, as do a few large private sector companies. Some public sector employers, including local authorities and government departments, may also employ a small core staff of interpreters and translators. International organisations tend to be the largest employers of full-time interpreters and translators. The majority of employers of language service professionals use a more flexible model, based on freelance staff.

The voluntary and community sector is also a significant employer of freelance interpreters and translators when supplying their services to a diverse community.

There are no reliable figures available on the numbers of translators and interpreters based in the UK as of 2011. In the Labour Force survey, these occupations are categorised under **SOC code 4: admin & secretarial** and it is therefore difficult to make an accurate calculation of the percentage of the total who are working in interpreting and translation.

However, we can draw some information from the memberships of the professional bodies in the field. Membership of the professional bodies, as of 31 January 2012, is as follows:

Association of Translation Companies (ATC) – 203 members. Membership is made up of companies and organisations that offer translation services, not individuals, and covers the four UK nations.

Chartered Institute of Linguists (CIoL) – 6000 members. Membership covers all categories, including translation, interpreting and other linguist professions e.g. teaching, lecturing, and covers the four UK nations.

Cymdeithas Cyfieithwyr Cymru (the association of Welsh translators and interpreters) – 352 individual members and 7 corporate members. Membership covers translation and interpreting.

The Institute of Translation and Interpreting (ITI) – 1465 qualified members, 1285 associate members (who have not yet achieved full qualified status), 74 corporate members. Membership covers different categories, including translation and interpreting and covers the four UK nations.

National Registers of Communication Professionals working with Deaf and/or Deafblind People (NRCPD) – 718 full interpreters, 108 trainee interpreters, 156 junior trainee interpreters. Membership covers the four UK nations.

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<sup>25</sup> Language Service Providers are defined as companies or organisations offering professional language services to other companies or organisations, including interpreting, translation and localisation.

## 2. Profile of the Workforce

National Register for Public Service Interpreters (NRPSI) – 2377 members. Membership covers all spoken languages and the four UK nations.

It should be noted that not all members will work full-time in the professions, but are expected to undertake continuing professional development activities. Additionally, some members may be based overseas and therefore do not form part of the UK workforce.

Some individual interpreters or translators may belong to more than one professional body, so there will also be an element of double-counting.

However, as membership of a professional body is not compulsory, we can reasonably assume that these figures are just a percentage of the true numbers working in interpreting and translation.

### 2.1.2 Language teaching and training

#### 1.1.1.1 Primary and secondary education

Specialist language teacher training is now available for teaching staff from primary at Key Stage 2 (ages 7 to 11) to secondary level. For primary and secondary education, the two main training routes are:

- a Postgraduate Certificate of Education (PGCE) – the candidate undergoes the majority of their training in an academic institution, full-time or part-time, combined with practical experience in schools
- a Graduate Teacher Programme (GTP) – the candidate undergoes the majority of their training in a school environment, with additional academic input.

Successful completion of either of these training routes will lead to Qualified Teacher Status (QTS).

##### 2.1.2.1.1 England

As of April 2011, the following numbers were registered to teach languages at secondary level with the Training and Development Agency for Schools (TDA).

**Table 1: Numbers registered to teach languages at secondary level - England**

	<b>Total</b>
French	14,700
German	5,700
Spanish	6,400
Other modern languages	3,300

Of these totals, 3800 were registered to teach A-level French, 1900 were registered to teach A-level German and 1800 to teach A-level Spanish. 600 were registered to teach other modern languages at A-level.

These figures include double-counting i.e. a teacher registered to teach French and German is counted twice.

The General Teaching Council for England (GTCE) reports that, as of January 2012, there are 22,830 registered teachers with an 'ITT' language Qualification Subject, i.e. the 'ITT'

## 2. Profile of the Workforce

language Qualification subject is the subject specialism that led to their Qualified Teacher Status being awarded.

### 2.1.2.1.2 Scotland

In the academic year 2010/11, the following numbers of modern language teachers at secondary level were registered in Scotland:<sup>26</sup>

**Table 2: Numbers registered to teach languages at secondary level – Scotland**

	<b>Total</b>
French	3036
Gaelic	126
German	1458
Italian	241
Spanish	816

These figures include an element of double-counting i.e. a teacher registered to teach French and German is counted twice.

### 2.1.2.1.3 Wales

As of March 2010, the number of teachers registered with the General Teaching Council for Wales as trained to teach languages as a subject at secondary level in Wales were as follows<sup>27</sup>:

**Table 3: Numbers registered to teach languages at secondary level – Wales**

	<b>Total</b>
French	575
German	104
Italian	3
Latin	2
Spanish	55
Welsh	794
Other modern languages	169

These figures include an element of double-counting i.e. a teacher registered to teach French and German is counted twice.

In March 2010, the total number registered as teaching modern languages as a subject at secondary level was 854.

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<sup>26</sup> General Teaching Council of Scotland, Statistical Digest.

<sup>27</sup> General Teaching Council for Wales, <http://www.gtcw.org.uk/gtcw/index.php/en>.

## 2. Profile of the Workforce

### 2.1.2.1.4 Northern Ireland

The General Teaching Council for Northern Ireland (GTCNI) does not record subject specific information, as registration with GTCNI is not phase- or subject-specific. Therefore, comparable data is not available.

### 2.1.2.2 Further and adult education

There are three routes to achieving the status of Qualified Teacher Learning and Skills (QTLS), the further education (FE) equivalent of Qualified Teacher Status (QTS) in schools.

- a Postgraduate Certificate of Education (PGCE) – the candidate undergoes the majority of their training in an academic institution, full-time or part-time, combined with practical experience. Candidates have five years from the start of their training to achieve QTLS
- in-service Diploma in Teaching in the Lifelong Learning sector (DTLLS) – similar to the GTP, a candidate would study part-time while working in the FE sector. This route is often popular for shortage areas or subjects
- qualified teacher in other sectors – teachers holding a QTS from the secondary sector are currently eligible to teach in further education. They need to achieve QTLS within five years.

Preparatory qualifications in the FE sector include:

- Preparing to Teach in the Lifelong Learning Sector (PTLLS): for all teachers;
- Certificate in Teaching in the Lifelong Learning Sector (CTLLS): for associate teachers.

There are currently no reliable data available on the numbers of teachers of languages in FE. However, provision of languages in FE has declined over the years. Previous intelligence<sup>28</sup> indicated that fewer than half of FE colleges offered opportunities to learn a language alongside vocational courses. More recent reports<sup>29</sup> suggest that this has declined further, with most post-16 language provision being offered in sixth form colleges following an academic route i.e. A-levels.

### 2.1.2.3 Higher education

Language study in higher education is offered both in an academic context and in language centres.

HESA data for 2010/11 showed that 20,915 staff were employed in academic and non-academic roles in humanities, language-based studies and archaeology. Unfortunately, there is no way to further pinpoint how many of these work in language-based studies.

### 2.1.2.4 Language training

Language training is offered by major international companies with offices in the UK, e.g. Berlitz, as well as a network of smaller specialist language trainers. Some trainers offer

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<sup>28</sup> CILT, the National Centre for Languages, 2008a, Labour market intelligence for the qualifications strategy for foreign languages and intercultural skills.

<sup>29</sup> Scottish Centre for Information on Language Teaching (SCILT), 2011, Scottish Languages Review

## 2. Profile of the Workforce

training in several or 'all' languages. Others may specialise in one or a few specific languages. Trainers may offer bespoke training for companies or individuals requiring language skills, or provide 'off-the-peg' solutions leading to accredited or non-accredited achievement.

An internet search in July 2011 on Yell.com indicated that there were 3919 language training companies in the UK as a whole. There are no data on the numbers of staff employed in this sector.

### 2.1.2.5 Intercultural and cultural training

Cultural training and intercultural skills training are usually offered by private companies on a bespoke basis. There are no figures available on the numbers working in this sector. Often this training is offered as an additional service by language training providers.

The UKTI also offer cultural briefings for businesses that are looking to expand into overseas markets and wish to learn more about the culture of the intended market beforehand.

A Yell.com survey in January 2012 returns a figure of 166 organisations offering cultural training across the UK (including organisations who also offer language training).

### 2.1.2.6 Intercultural courses in higher education

A search on UCAS.com of higher education courses starting in autumn 2012 showed two undergraduate programmes stipulating intercultural in the title: Languages & Intercultural Communication at Edinburgh Napier University and International Management and Intercultural Communication at the University of Stirling.

A search on UKPASS, UCAS' postgraduate search service, reveals 75 courses across UK institutions that include a major or minor intercultural element.

### 2.1.3 Other job roles and occupations

Research indicates that languages are used in a very wide range of professions and at all skill levels. Finance, manufacturing, construction, arts and culture, IT, passenger transport, travel and tourism, hospitality, government, environmental, fashion, retail, media, health and social care, law enforcement, central and local government and the third sector are all sectors that have demonstrated a demand for languages and intercultural skills.<sup>30</sup>

Customer facing roles in all sectors demonstrate a high demand for language and intercultural skills. Recent research<sup>31</sup> indicated that over a third of all graduate vacancies requiring language skills were in sales or trading roles.

However, there are no robust data available on the numbers working across all sectors using languages and intercultural skills in a job role due to the diverse nature of job roles (cf. section 1.1).

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<sup>30</sup> University Council of Modern Languages (UCML), May 2011, Labour Market Intelligence on Languages and Intercultural Skills in Higher Education.

<sup>31</sup> Ibid

## 2. Profile of the Workforce

### 2.2 Regulation of the sector

There is no regulation of pan-sector languages and intercultural skills. Employers are free to set their own requirements for entry and performance.

#### 2.2.1 Interpreting and translation

Interpreting and translation are unregulated professions in the four UK nations, although there are a range of high level professional qualifications available, all mapped to National Occupational Standards.

The National Agreement on the Arrangements for the use of Interpreters and Translators in the Criminal Justice System in England and Wales, was revised in 2007. It is not a statutory agreement. Instead, it provides 'guidance on arranging suitably qualified interpreters and Language Service Professionals when the requirements of Articles 5 and 6 of the European Convention on Human Rights apply'<sup>32</sup>. In all four nations, spoken language interpreters working in the criminal justice sector must be registered with either the National Register for Public Service Interpreters (NRPSI) or comply with exemption criteria. For sign languages, interpreters must be registered with the National Registers of Communication Professionals working with Deaf or Deafblind people (NRCPD).

The UK Border Agency stipulates that spoken language interpreters must be registered with either the NRPSI or comply with exemption criteria, or be registered with NRCPD for sign languages.

There is no comparable stipulation for other public services, e.g. healthcare, for spoken language interpreting, although interpreters on the National Register are preferred. No registration is required for translation in the public sector.

There is greater regulation for sign language interpreting. Interpreters of signed languages must be registered with NRCPD to obtain work in any area of the public sector.

The private sector is free to make their own regulations on the selection of language service professionals to supply translation and interpreting services.

Nation-specific requirements for interpreting and translation are identified below.

##### 2.2.1.1 England

In 2011, the Ministry of Justice awarded the contract for supplying interpreting and translation to two preferred suppliers – one for spoken language and one for sign language. The terms of the contract lay down minimum guidelines for interpreters and translators to the Ministry of Justice. For spoken language interpreters and translators, adherence to these guidelines will be monitored by contract management and contractors are able to make their own recruitment decisions, assessing suppliers' skills and competences where necessary.

There is more regulation in the provision of interpreting services for the deaf, due to the provisions of the Equality Act 2010. All interpreters supplied under the contract must be a member of the NRCPD.

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<sup>32</sup> Office for Criminal Justice Reform, as revised 2007, National agreement on arrangements for the use of interpreters, translators and language service professionals in investigations and proceedings within the criminal justice system.

## 2. Profile of the Workforce

### 2.2.1.2 Scotland

In 2009, a contract for supplying interpreting and translation to the Criminal Justice sector was awarded to a preferred supplier in Scotland. The terms of the contract lay down minimum guidelines for interpreters and translators. Adherence to these guidelines will be monitored by contract management and contractors are able to make their own recruitment decisions, assessing suppliers' skills and competences where necessary.

Interpreters of signed languages must be registered with NRCPD to obtain work in any area of the public sector.

### 2.2.1.3 Wales

Bilingual Welsh-English provision is an additional driver of demand. The Welsh Language Act 1993 requires public bodies to publish schemes on how they will deliver services in the Welsh language, and individuals have the right to access services in the Welsh language if they so wish. Larger private companies also have developed Welsh language policies in response to the Act. This has increased the demand for translation and interpreting from English to Welsh and vice versa. For sign language, interpreters must be registered with NRCPD to obtain work in any area of the public sector.

## 2.2.2 Teaching and tutoring

See sections 2.1.2.1 and 2.1.2.2 for requirements to work in the teaching sector.

Private language training providers are free to set their own recruitment criteria and entry requirements for employees and freelance workers.

## 2.3 Salary

There is little or no information available on salaries for the sector. As languages and intercultural skills are pan-sector skills, salaries are usually defined by the sector in which the language or intercultural skill is applied.

However, according to data analysed by HEFCE in 2008, the mean annual salary of language graduates in their early careers was £26,823<sup>33</sup> – higher than that of graduate engineers, mathematicians, physicists, or chemists. This indicates that language graduates in the UK may experience some financial advantages.

## 2.4 Qualification levels

There is little data available on the qualification levels of people working with languages and intercultural skills. Data is usually measured on the sector and job role in which these pan-sector skills are applied.

Interpreters, translators, teachers and tutors all benefit from high level qualifications (level 6 or higher). Other individuals work across a range of roles, and no data is available on the qualification levels achieved by individuals applying added value or underpinning language skills to a job role.

## 2.5 Demographics of the workforce

There has been no research carried out since 2008 in terms of the age of the workforce. Previous labour market intelligence specific to translation and interpreting indicated that

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<sup>33</sup> Higher Education Funding Council for England (HEFCE), Issues Paper 2008/39, Graduates and their Early Careers.

## 2. Profile of the Workforce

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64 per cent of the workforce was female. Almost three-quarters of the workforce (74 per cent) was aged between 30 and 50, and 14 per cent under 30.

Due to the diverse nature of the services provided, the translation and interpreting workforce come from a variety of ethnic backgrounds. Research in 2008 indicated that 48 per cent of the workforce were native English speakers.

Due to the pan-sector nature of languages and intercultural skills, there is no demographic data available on those using languages or intercultural skills in an added value or underpinning job role.

### 2.6 Languages spoken

At present, there is no official information available on languages spoken across the UK. However, a question on languages spoken was included in the 2011 UK Census and information will be available in future ONS reports and other related census outputs.

In February 2010, the Welsh Government announced that it will start to collect information on the first language of all compulsory school aged pupils in all maintained schools through the Pupil Level Annual Schools' Census (PLASC). This will also provide some data on other languages spoken in the UK.

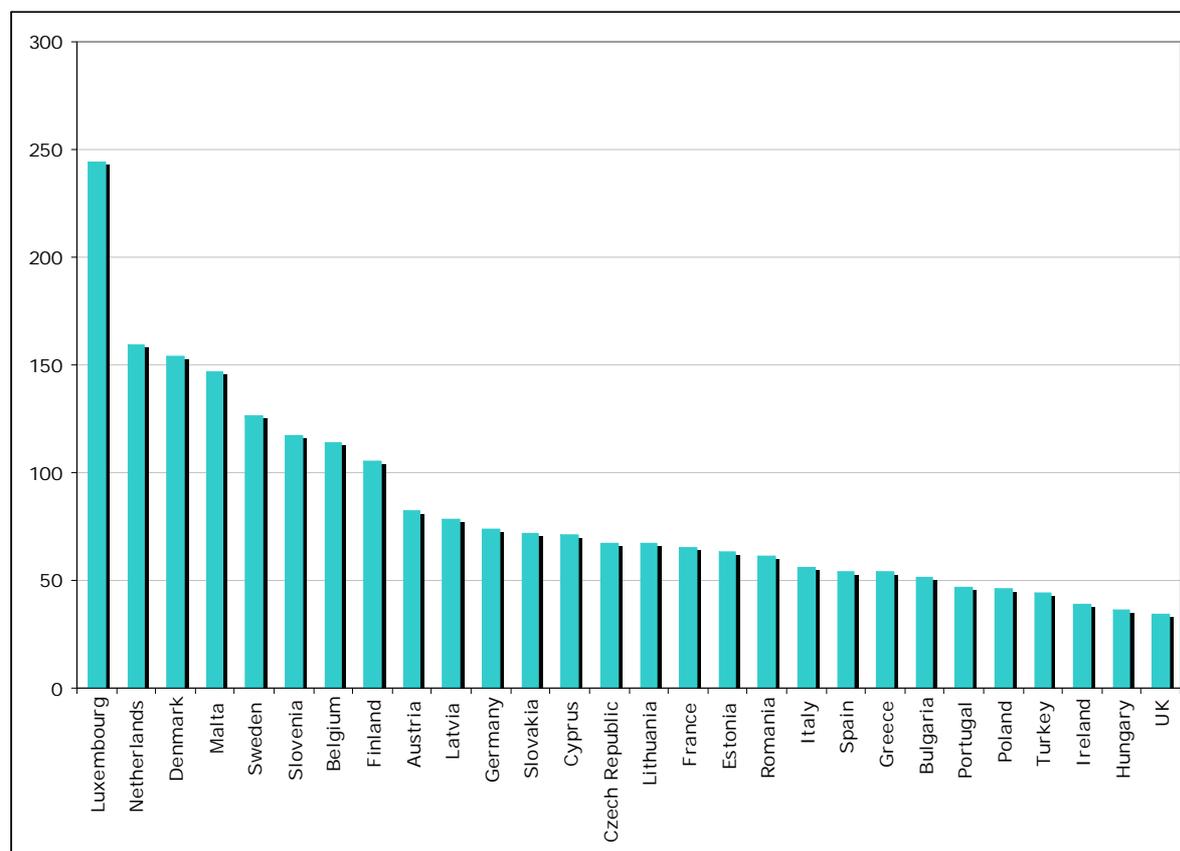
In 2005, a European Commission Eurobarometer survey aggregated<sup>34</sup> all non-mother tongue languages spoken in 28 countries. The results indicated that out of all countries surveyed, the UK had the least competence in a second language.

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<sup>34</sup> CILT, the National Centre for Languages, 2005b, Talking Sense: a research study of language skills management in major companies, page 3.

## 2. Profile of the Workforce

Figure 1: Language skills of Europeans (2005)



Key: the aggregate of all non-mother tongue skills in each country (i.e. the percentage saying they spoke French added to the percentage saying they spoke German etc.)

### 2.7 Language Uptake

#### 2.7.1 Number of people studying languages

In 2011, there were 324,644 entries for GCSEs in all languages, which equates to 6.3 per cent of all GCSE entries across all subjects.

##### 2.7.1.1 England

In 2010, at GCSE level, there were 160,600 pupils taking French, 65,800 German, 58,200 Spanish and 23,600 other language.<sup>35</sup>

At A level, 11,979 sat French, 4,866 German, 6,885 Spanish and 8,666 other languages.<sup>36</sup>

##### 2.7.1.2 Scotland

In 2011, at Standard Grade, 23,548 students took French. 5,926 German, 3,439 Spanish, 365 Gaelic and 173 took Gaidhlig. 678 took a Standard Grade exam in other languages.<sup>37</sup>

<sup>35</sup> CILT, the National Centre for Languages, March 2011, Language Trends 2010, page 11.

<sup>36</sup> JCQ

<sup>37</sup> Scottish Qualifications Authority (SQA), 2010, Annual Statistical Report 2010.

## 2. Profile of the Workforce

In 2011, at Higher Grade, 4,354 took French, 1,055 German, 1,498 Spanish, 127 Gaelic and 116 Gaidhlig. 613 took a Higher Grade examination in other languages (NB. a much wider range of 'other languages' are taken at Higher Grade).

At Advanced Higher, 691 took French, 160 German, 232 Spanish, 18 Gaelic and 18 Gaidhlig. 93 took an Advanced Higher Grade in other languages in 2011.

In 2011, 36 students were entered for the full Scottish Baccalaureate award in Languages, and 46 were entered for the Interdisciplinary project.

### 2.7.1.3 Northern Ireland

In 2011, at GCSE level, 66,47 sat French, 1,072 German, 3,474 Spanish, 1,966 Irish, and 338 sat other languages.<sup>38</sup>

At A level, 576 took French, 121 took German, 481 Spanish, 328 Irish and 96 other modern languages.

### 2.7.1.4 Wales

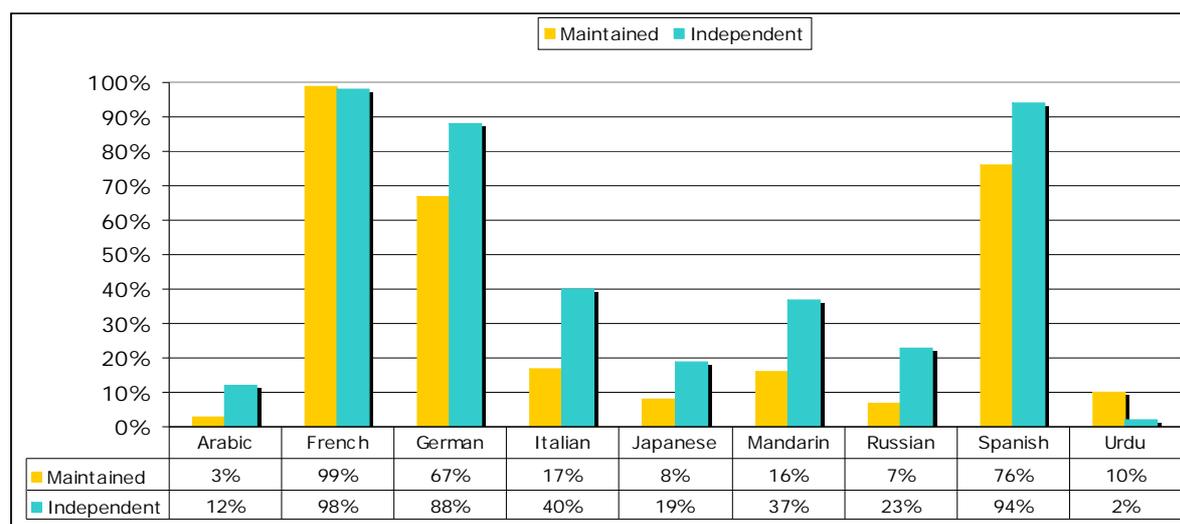
In 2011, at GCSE level, 6,102 students sat French, 1,433 German, 1,774 Spanish and 9,999 Welsh as a second language. A total of 311 sat other language GCSEs.<sup>39</sup>

At A level, 641 took French, 179 German, 244 Spanish and 916 Welsh. 191 sat other languages.

## 2.7.2 Language offered by schools

The languages offered at all levels by schools in England, whether as part of the curriculum or outside the curriculum, are shown in **Figure 2** below.

**Figure 2: Language offered at any level in the curriculum at KS3, KS4, post 16 or outside curriculum time**



Source: CILT (2010) *Language trends 2010*, page 1

As **Figure 2** shows, independent schools are more likely to offer a range of languages than the maintained sector. French is the language most commonly offered by the maintained sector.

<sup>38</sup> JCO

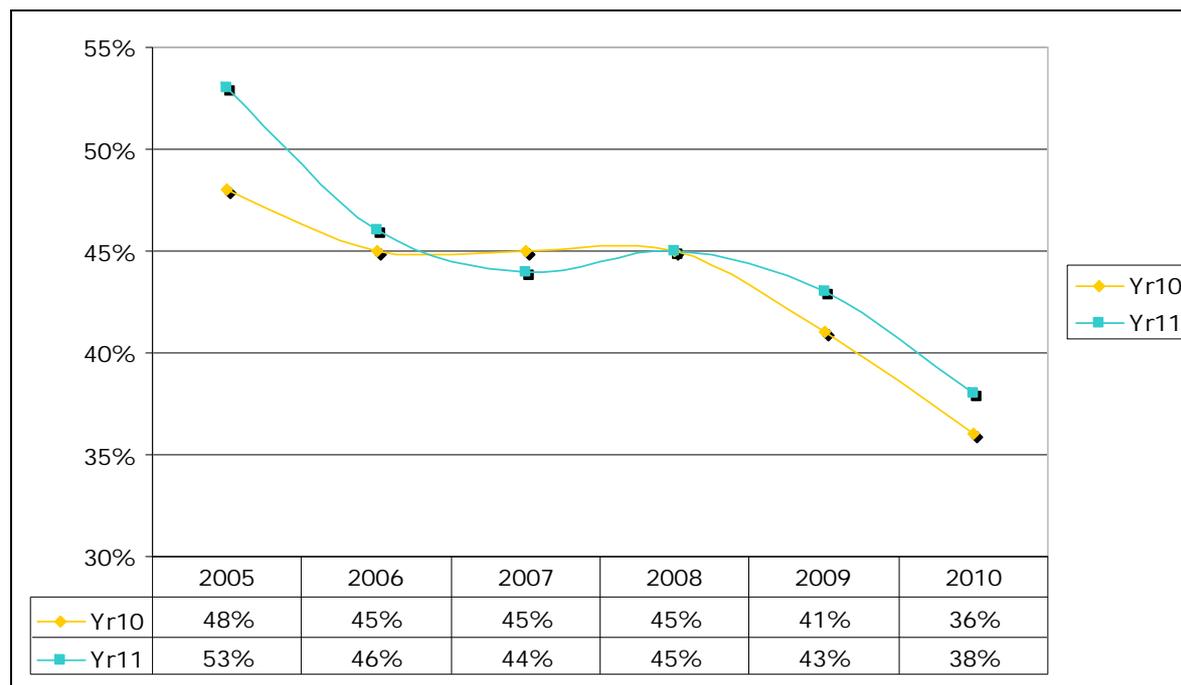
<sup>39</sup> Ibid

## 2. Profile of the Workforce

### 2.7.3 GCSE Level

There has been a decline in the number of students studying languages in England at KS4. **Figure 3** shows the declining number of schools reaching the 'benchmark'<sup>40</sup> of 50 per cent of pupils studying a language in KS4.

**Figure 3: Participation in KS4 languages by schools**



Source: CILT (2010) *Language trends 2010*, page 1

### 2.7.4 Post-16

Approximately a third of maintained schools (34 per cent) and quarter of independent schools (27 per cent) reported an increase in overall take up in 2010. This compares to 26 per cent for maintained schools and 22 per cent for independent schools in 2009.

42 per cent of maintained schools and 41 per cent of independent schools reported a decrease or discontinuing of German take-up. Around one in five schools reported an increase in or the introduction of German take-up post-16.

33 per cent of maintained schools reported a decrease or discontinuation in French while about a quarter (27 per cent) reported an increase or introduction of the language.

31 per cent of maintained schools and 17 per cent of independent schools reported decrease or discontinuation of Spanish. 36 per cent of maintained schools reported an increase in the introduction of Spanish compared to 44 per cent of independent schools.

<sup>40</sup> This benchmark was set by Government when languages became optional at Key Stage 4.

## 2. Profile of the Workforce

**Table 4: Overall reported trend in pupil take up by languages over past three years**

(%)	French				German				Spanish			
	2009		2010		2009		2010		2009		2010	
	Maintained	Independent										
Increase	30	26	24	20	22	19	19	17	38	46	29	41
New	2	1	3	0	3	0	1	0	10	0	7	3
No Change	43	50	40	52	35	43	38	43	33	43	34	39
Decrease	18	23	27	28	29	36	29	39	13	11	24	16
Discontinuation	7	0	6	0	11	1	13	2	5	0	7	1
<b>Total number of schools</b>	<b>330</b>	<b>80</b>	<b>325</b>	<b>123</b>	<b>239</b>	<b>72</b>	<b>27</b>	<b>109</b>	<b>193</b>	<b>72</b>	<b>200</b>	<b>117</b>

Source: CILT (2010) *Language trends 2010 secondary*, page 11

Overall, Spanish is the language that has seen the greatest increase in take-up post-16, while French and German were the most likely to see no change.

The 2010 Language Trends survey asked respondents their views on the best way to improve language take-up post-16. Heads of languages in maintained schools were mostly likely to state that greater support from senior management was the most effective tool (61 per cent). Heads in independent schools were most likely to state more opportunities for work placement or exchanges abroad as the most effective method to increase take-up (52 per cent).

**Table 5: Measures considered most effective in improving the take-up of language post 16**

	% Maintained schools	% Independent schools
More collaboration with schools/ colleges/ university	25	8
Better career services	15	11
Better qualified and more experienced teaching staff	22	43
More relevant qualifications/courses	30	29
More time for languages in the curriculum	38	34
Opportunities for work placement/ exchanges abroad	40	52
Opportunities to practice with native speakers of the language	36	46
Greater support from senior management team	61	39
Other	11	10
<b>Total number of schools</b>	<b>337</b>	<b>127</b>

Source: CILT (2010) *Language trends 2010 secondary*, page 12

## 2. Profile of the Workforce

### 2.7.5 Higher education

According to data collected by the Higher Education Statistics Agency (HESA) and analysed by CILT in 2011<sup>41</sup>, 56,770 UK, EU and overseas students were enrolled in language programmes in all years of study at all higher education institutions in the UK for the 2009/10 academic year – 2.5 per cent of the total 2,283,715 UK and overseas domiciled students in higher education.<sup>42</sup> This includes:

- 29,175 undergraduates studying languages as a first degree
- 19,235 other undergraduates studying languages
- 6,455 postgraduates
- 1,910 PGCE students in languages.

### 2.7.6 Overall take-up of language qualifications

The total number of learners achieving language qualifications cannot be accurately calculated, as data needs to be collected from a range of sources. Not all sources record data consistently, and therefore the totals can only be estimated from consistent data sources. The estimated number below includes all learners from the 14 to 19 and the post-19 age groups across the UK in June 2010.

**Table 6: Estimated number of learners achieving language qualifications – England, Northern Ireland, Scotland and Wales**

Type of qualification	Achieved
entry level	8974
general	447 450
other general	*
vocational	35 490
<b>Total</b>	<b>491 914</b>

These figures include those obtaining qualifications in further education and adult education centres.

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<sup>41</sup> HESA data on language study found this and the following sections use the BIS full person equivalent (FPE) count, where single honours students = 1, joint honours = 0.5, major honours = 0.667, minor honours = 0.333, triple honours = 0.333.

<sup>42</sup> HESA (2010). Data collected by CILT, 2002-2010.

### 3. Drivers of skills demands

The key drivers of demand for Languages and Intercultural Skills are set out below.

#### 3.1 Economic conditions

The recession has brought about new and diverse challenges across all sectors for individuals with languages and intercultural skills. Many jobs have been lost, particularly in the public sector and in certain regions. The need to find new customers and new sources of income are seen as key to survival and growth in this global economy, with a strong private sector providing the bulk of jobs.

Recessions across the world affect commerce in both market and currency terms, and any export growth can have a significant effect on UK productivity. Government policy acknowledges the importance of export growth<sup>43</sup> and UKTI services continue to support UK businesses looking to export for the first time or widen their export markets.

Research in May 2011 argues that underinvestment in languages amounts to the equivalent of a 3 to 7 per cent tax on British exports and estimates the current cost to be in the range of £7.3 billion and £17 billion, or 0.5 to 1.2 per cent of GDP.<sup>44</sup>

The same research also indicated that the Confederation of British Industry (CBI) notes that while a lack of foreign language skills may not often lead to direct losses, it is likely that it has dissuaded businesses from entering into new global markets.<sup>45</sup> Companies who are proactive in their export approach and adapt their products, services, and literature to meet market needs and place a high value on language skills could see their business increase on average by £290,000 per annum, and export businesses that proactively use language skills achieve on average 45 per cent more sales.<sup>46</sup>

Language and intercultural skills are not just important for outgoing trade, but for inward investment. Companies looking to establish a base or a presence in the UK require evidence of the languages spoken in a particular region before deciding to invest. Inward investment agencies can use language skills in the resident population as a selling point for a region or area.

Competition for jobs mean an added value skill such as languages or international experience can give individuals an edge when applying for jobs in a competitive market.

In a time of economic uncertainty, creative approaches to trading are necessary. In addition, different skills are often brought to the forefront and innovative working approaches need to be introduced. Those who are already in the workforce at this time therefore may need to develop their existing skills, or learn a new set of skills in order to cope with the recession.

#### 3.2 Globalisation

The UK's future success rests on being able to respond to the two challenges posed by globalisation – the internationalisation of economic activity and the growth in interaction

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<sup>43</sup> UK Trade and Investment,

<http://www.ukti.gov.uk/uktihome/aboutukti/aimsobjectives/corporatestrategy.html>

<sup>44</sup> University Council of Modern Languages (UCML), May 2011, Labour Market Intelligence on Languages and Intercultural Skills in Higher Education.

<sup>45</sup> Ibid

<sup>46</sup> Ibid

### 3. Drivers of skills demands

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between diverse cultures. While English is a 21st century global language, the UK risks losing out on business opportunities that involve non-English speaking countries.

The Internet is an essential platform for international communication and commerce and its language use has changed dramatically during this century. In 2000, English accounted for 51 per cent of all language use on the Internet, but in 2009 it had fallen to just 29 per cent. Technological advances mean that Internet users can now access webpages in a range of scripts and alphabets, and this has eroded the status of English as an international online language.

In recent Eurobarometer study<sup>47</sup>, nine out of 10 internet users reported that, when given a choice, they would visit a website in their own language. 44 per cent of all internet users surveyed across the EU only use their own language online. 42 per cent never use a second language to shop or buy products online, or research tourism activities. This indicates the importance of businesses translating or localising their websites into the languages of their preferred or potential markets.

Globalisation has also led to a growth in multicultural societies across the UK and the wider world, with migration for study and work purposes stimulating multiculturalism and diversity. This means an increased demand for intercultural skills, both in a work context and in wider society.

#### 3.3 Demographics

Learning other languages and valuing other cultures promotes tolerance and understanding. Evidence from standards development<sup>48</sup> and employer surveys<sup>49</sup> demonstrates that intercultural skills are essential to the success of a multicultural team and underpin good management in public services as well as in businesses.

As highlighted in section 1.2, the ONS estimates that there are 4.04 million non-UK born people in employment in the UK compared to 25.09 million UK-born people.<sup>50</sup> This is a relatively significant proportion of 'foreign born' workers. It has created a diverse workforce, which shows no immediate signs of slowdown. In fact, other statistics show that this number may remain stable for some time and will ensure that the need for intercultural skills will become increasingly important.

In England, according to the Department for Education, in 2011, one in six primary schoolchildren (16.8 per cent) and one in eight (12.3 per cent) secondary students speak another language besides English – nearly a million across England.<sup>51</sup> Recent research on languages spoken in London reported that 41 per cent of schoolchildren in London spoke a language other than English.<sup>52</sup>

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<sup>47</sup> Eurobarometer survey 313, May 2011

<sup>48</sup> CILT, 2008b, Consultation into the development of National Occupational Standards for Intercultural Working.

<sup>49</sup> Confederation of British Industry (CBI), 2010, Ready to Grow: Business priorities for education and skills, Education and skills survey 2010. & Confederation of British Industry (CBI), 2011, Building for Growth: Business priorities for Education and Skills, Education and Skills Survey.

<sup>50</sup> Office for National Statistics (ONS), May 2011, Labour Market Statistics.

<sup>51</sup> Department for Education/National Statistics Statistical Volume, December 2011, Education and Training Statistics for the United Kingdom: 2011.

<sup>52</sup> CILT, the National Centre for Languages, October 2010, Language Capital.

### 3. Drivers of skills demands

These students are often high achieving, despite language barriers. Data published by Department for Education in February 2012<sup>53</sup> reported that teenage students whose first language is not English are making better progress between the start of secondary school and the time they reach 16 than other groups. 58.5 per cent of pupils with English as a first language achieved five or more A\*-C grades at GCSE or equivalent including English and maths, compared to 55.8 per cent of pupils with a first language other than English. This gap has continued to narrow year on year.

Statistics from the ONS<sup>54</sup> show that the number of migrants entering the UK for work purposes has gone down from a peak of 239,000 in June 2008 to 186,000 in November 2011. However the main decline occurred between December 2008 and September 2009. The figure has remained roughly stable since September 2009.

#### 3.4 Technology

The Internet and the growth of online marketing has led to new linguistic challenges. Website localisation to increase sales continues to drive the demand for translators in diverse languages. Localising products for different markets also stimulates demand for translation services. The ability to use different scripts and alphabets on the Internet now means that webpages can appear in Arabic, Chinese, Japanese, Russian etc. much more easily and the expansion of the internet as a global marketplace drives the demand for high level language skills.

A pan-European survey in May 2011 reported that 90 per cent of Internet users in the EU prefer to access websites in their own language<sup>55</sup>. However, 44 per cent of European Internet users feel they are missing interesting information because web pages are not in a language that they understand and only 18 per cent buy products online in a foreign language. This demonstrates the importance of translating websites with online shops and that offer shipping.

Advances in computer assisted translation tools have made the translation process more productive and cost-effective. However, human input is still essential to operate translation tools and to implement quality assurance and maintain terminology databases. As a result, translators are learning new skills and developing new methods of working.

The same technological advances also pose a threat to the profession, however, as less well informed organisations may use tools such as Google Translate for translation tasks. This inevitably leads to an increase in poor, inaccurate and non-quality assured translations. It also ensures that professional translation needs to be promoted as the correct tool for a business to use in their technical or promotional literature.

#### 3.5 Policy

##### 3.5.1 England

###### 3.5.1.1 Schools policy

When the coalition government came to power in May 2010, they withdrew support for the National Languages Strategy. They also halted the development of the Diploma in

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<sup>53</sup> Department for Education, 2012, GCSE and Equivalent Attainment by Pupil Characteristics in England, Statistical First Release.

<sup>54</sup> Office for National Statistics, November 2011, Migration Statistics Quarterly Report.

<sup>55</sup> Eurobarometer survey 313, May 2011

### 3. Drivers of skills demands

Languages and International Communication, which had received a great deal of support from employers and academics alike. It was felt by many employers and educators that the abolition of this qualification would have a negative impact on the numbers studying languages, as the qualification would have included language GCSEs and A-levels.

Instead, at school level, the UK Government introduced a new performance measure in November 2010. The English Baccalaureate, or the Ebacc, will be awarded to any student awarded GCSEs A\*-C in a core of traditional subjects: English, mathematics, the sciences, a foreign language and history or geography.

It is hoped that this measure will act as an incentive to study languages at GCSE and therefore increase take-up. Initial results published in January 2012 would indicate that it is too early to assess the impact of this measure on languages specifically and future Language Trends surveys may give a better indication of its success.

The coalition has also introduced University Technical Colleges<sup>56</sup> (UTCs), to offer general and vocational education. UTCs usually specialise in engineering or advanced manufacturing and are open to 14 to 19 year olds interested in following one of these technical routes. They are designed to develop a high degree of technical knowledge as well as a high quality general education. From ages 14 to 16, the split between general education and technical studies will be 60:40 and a modern language will be taken as a compulsory part of the general education element. Post-16, students will be able to choose to continue their education or follow an apprenticeship.

The coalition government also changed the way in which schools received funding. Before May 2010, funding was distributed by government to local authorities, who controlled overall budgets and distributed funding to schools. Now, funding is distributed directly to schools, which have full control over their own budgets. This led to changes in the support structure for schools, with local authority job losses and the restructure of CILT, the National Centre for Languages. The National Centre for Languages withdrew from certain areas of activity, including standards setting, and merged with the Centre for British Teachers (CfBT) to provide targeted activities supporting teachers in primary and secondary schools.

Other government-funded initiatives aimed at encouraging language learning and stimulating take-up, including Business Language Champions<sup>57</sup>, ceased in 2011, bringing an end to centrally-funded support programmes.

#### 3.5.1.2 Skills strategy

The Department for Business, Innovation and Skills' (BIS) Further Education strategy<sup>58</sup> states the intention to support the sector to take advantage of opportunities in the global market. BIS' Skills for Sustainable Growth strategy<sup>59</sup> seeks to achieve:

- increased productivity and employment as a result of an internationally competitive skills base

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<sup>56</sup> University Technical Colleges, [www.utcolleges.org](http://www.utcolleges.org).

<sup>57</sup> Business Language Champions programme, developed and managed by CILT, supported businesses that have a requirement for language skills to work with schools and students on work-related projects. It provided schools and students with the opportunity to hear directly from employers the benefits of languages to a wide range of job roles and sectors.

<sup>58</sup> Department for Business Innovation and Skills (BIS), 2011, *New Challenges, New Chances*, Further education and skills system reform plan: building a world class skills system.

<sup>59</sup> Department for Business Innovation and Skills (BIS), 2010, *Skills for Sustainable Growth*.

### 3. Drivers of skills demands

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- increased numbers of skilled jobs and skilled people at all levels
- reduced skill deficiencies at local, regional or sectoral level.

In vocational education, language qualifications are not a priority for skills funding, and take-up has potentially suffered as a result of employers reporting not being able to access funding for language training. However, language qualifications remain a popular choice for adults looking to enhance their skills for work or social purposes, with or without financial support from an employer. Vocational language qualifications have also been very successful in schools in England and Wales, although recent changes to performance table equivalences may have an impact on take-up in this sector<sup>60</sup>. As a result, employers may see fewer individuals leaving schools with the required language skills.

#### 3.5.1.3 Higher education

Efforts have been made to stimulate the numbers learning a language in Higher Education. In 2007, the Higher Education Funding Council for England (HEFCE) funded a three year programme called Routes into Languages, which brought together consortia of universities across England to work with schools to promote language learning. It also created two networks to promote the careers of translation and interpreting to students studying languages in schools and universities. This funding was then extended to July 2011, to maximise the impact of the programme. It continues to work in a successful partnership format to promote language learning.

The introduction of increased fees in higher education in England from September 2012 is anticipated to have an effect on the study of language degrees. Studying a language, whether single or joint honours, at university usually requires four years of study with one year spent abroad on a study or work placement. Uncertainty exists around the issue of whether the year abroad will also be charged at £9000 and four year degrees may suffer as a result of the increased fees. Initial indication from UCAS<sup>61</sup> in figures released in January 2012 show that applications to European language courses are down by 11.2 per cent and those to non-European languages are down by 21.5 per cent: both decreases are well above the average decline across all subjects. Trends will need to be monitored over the next 2 to 3 years to measure the full impact, but it is apparent that the increased fees are having a higher than average impact on languages in higher education.

A report commissioned by HEFCE and prepared by Professor Michael Worton<sup>62</sup> of University College London recommended that the languages community and university leaders need to pro-actively establish and maintain a dialogue with government and stakeholders about 'how the study and research of foreign languages can respond to current and future challenges and to the needs of increasingly complex markets.'

#### 3.5.1.4 Export and trade

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<sup>60</sup> Prior to January 2012, QCF language qualifications and other general language qualifications i.e. Asset Languages, attracted performance points. This gave them relative equivalence to general qualifications i.e. GCSE, A-levels, and counted towards a school's performance in league tables. This will no longer be the case. While vocational language qualifications can still be offered in schools, they will not count towards the school's position in exam league tables.

<sup>61</sup> Universities and Colleges Admissions Service (UCAS), [www.ucas.com/about\\_us/media\\_enquiries/media\\_releases/2012/20120130](http://www.ucas.com/about_us/media_enquiries/media_releases/2012/20120130).

<sup>62</sup> Higher Education Funding Council for England (HEFCE), October 2009, Review of Modern Foreign Languages provision in higher education in England.

### 3. Drivers of skills demands

'Britain open for business'<sup>63</sup> is the UK Trade and Investment's new strategy which followed the Trade and Investment for Growth White Paper, published in February 2011<sup>64</sup>. As a result, demand may increase for language and intercultural skills to help communicate with new customers and access new markets.

*"Strong trade policies and strong trade outcomes are of the utmost importance for our economy, helping to create jobs and build sustainable growth. That is why, since day one, we have put the promotion of trade at the heart of our foreign and economic policy, harnessing the resources of every part of government; changing mindsets, sharpening our focus and doing all that we can to bolster UK trade and investment."*

**David Cameron, Prime Minister**

#### 3.5.2 Northern Ireland

##### 3.5.2.1 Skills strategy

Northern Ireland last published a programme of implementation for its skills strategy in 2006<sup>65</sup>. Two of its key aims are to:

- help to deliver high productivity and increased competitiveness
- secure Northern Ireland's future in a global marketplace.

The development and enhancement of languages and intercultural skills are essential to these aims.

##### 3.5.2.2 Higher education

Higher education fees for autumn 2012 will be frozen at £3,465 per year in Northern Ireland. However, this fee only applies to students from Northern Ireland attending university in the nation itself. If they attend university outside of Northern Ireland, they will have to pay up to £9000 per year, depending on the target institution's pricing structure.

#### 3.5.3 Scotland

##### 3.5.3.1 Schools policy

In Scotland, a Languages Baccalaureate has been introduced as a specialist language qualification for students in the later stages of secondary school. A science baccalaureate was also introduced. These are intended to provide a challenging qualification for students and prepare them for employment.

The Scottish government announced, in August 2011, plans to introduce the requirement to teach two modern languages to primary school pupils. These plans are currently under discussion but are intended to act as a long-term strategy to counteract the decline in students studying languages at Higher grade.

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<sup>63</sup> UK Trade and Investment, [www.ukti.gov.uk/uktihome/aboutukti/aimsobjectives/corporatestrategy.html](http://www.ukti.gov.uk/uktihome/aboutukti/aimsobjectives/corporatestrategy.html).

<sup>64</sup> UK Trade and Investment, [www.ukti.gov.uk/uktihome/item/125794.html](http://www.ukti.gov.uk/uktihome/item/125794.html).

<sup>65</sup> Department for Employment and Learning (DELNI), 2006, Success through Skills: the Skills Strategy for Northern Ireland.

### 3. Drivers of skills demands

#### 3.5.3.2 Skills strategy

Scotland also refreshed its skills strategy<sup>66</sup>, setting out its vision for a globally competitive economy. The strategy states that Scottish businesses will have opportunities to develop new markets and grow existing ones, both domestically and internationally. It recommends that the 'skills system must be positioned to respond effectively, and where appropriate, to drive opportunity in a global market. Languages and intercultural skills are essential to developing new markets and maximising global opportunities.

#### 3.5.3.3 Higher education

In higher education, Scotland is proposing a zero fee structure for eligible, Scottish-domiciled full-time students or EU students, but a fee of up to £9000 per year for Rest of UK students. This is subject to a legal challenge as of February 2012.

#### 3.5.3.4 British Sign Language

Scottish government has also conducted several policy reviews with regard to British Sign Language (BSL). In February 2009, it published a research report into linguistic access for deaf pupils and students in Scotland<sup>67</sup>. In August 2009, it presented a report<sup>68</sup> on linguistic access in Scotland. Between 2000 and 2011, Scottish government has convened and chaired a British Sign Language and Linguistic Access Working Group. The working group consists of representatives from deaf organisations and government officials. It enables the government to discuss issues at the heart of linguistic access for deaf, deafblind and hard of hearing people. The group's remit is to:

- develop a strategy for improving linguistic access for deaf people in Scotland
- raise awareness of deaf issues among policy makers, professionals, service providers, deaf people and the general public
- consider how best to support BSL and Deaf awareness
- consider how best to support education and training provision in BSL, deaf studies and linguistic access.

As of February 2012, a consultation was underway on a British Sign Language Bill. This Bill 'aims to secure BSL as one of Scotland's official languages, commanding equal respect with English and Gaelic; equally, it endeavours to achieve better awareness of information needs and services for BSL users; to protect the linguistic integrity of the language; and to promote the cultural aspects of BSL and the Deaf community as part of Scottish heritage.'<sup>69</sup>

#### 3.5.4 Wales

##### 3.5.4.1 Schools policy

As a follow-up to the 2002 National Language Strategy in Wales, Languages Count, the Welsh Assembly Government published Making Languages Count<sup>70</sup> in July 2010. It sets

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<sup>66</sup> Scottish Government, 2010, Skills for Scotland: Accelerating the Recovery and Increasing Sustainable Economic Growth.

<sup>67</sup> British Sign Language and Linguistic Access Working Group, 2009), Scoping Study: Linguistic Access to Education for Deaf Pupils and Students in Scotland.

<sup>68</sup> Scottish Government, 2009, The Long and Winding Road – A Roadmap to British Sign Language and Linguistic Access in Scotland.

<sup>69</sup> The Scottish Parliament, [www.scottish.parliament.uk/parliamentarybusiness/43168.aspx](http://www.scottish.parliament.uk/parliamentarybusiness/43168.aspx).

<sup>70</sup> Welsh Assembly Government, 2010: Making Languages Count.

### 3. Drivers of skills demands

out the actions to be taken to improve the teaching and learning of modern languages in Wales in secondary schools and Learning Pathways 14-19 in Wales. It is being implemented with the support of CILT Cymru, the National Centre for Languages in Wales. Its actions are directed at supporting practitioners with a programme of advice, guidance and professional development for the delivery of modern languages.

#### 3.5.4.2 Skills strategy

Since the last labour market review, the Welsh Assembly government published its labour market framework, Skills that Work for Wales<sup>71</sup> in 2010, to set out how it would improve employment opportunities and better integrate employment, skills and other programmes.

#### 3.5.4.3 Higher education

In 2008, the Routes into Languages project was extended to Wales, with funding from the Higher Education Funding Council for Wales (HEFCW). Routes Cymru now works with a consortium of universities across Wales to promote language learning and stimulate take-up.

In Wales, from autumn 2012, universities will charge £8,800 per year for higher education but Welsh students will not pay more than £3,465 per year wherever they study in the UK. Their study will be subsidised by the Welsh Assembly Government, who will meet additional fee costs.

#### 3.5.4.4 British Sign Language

BSL Futures was a project established by the Welsh Assembly Government to improve access to public services for BSL users across Wales, in partnership with RNID Cymru, Deaf Association Wales and the Association of Sign Language Interpreters. The project achieved its aim to increase BSL teaching capacity and train more than 30 new interpreters to work in Wales. Capacity has been increased as a result of the BSL Futures project and it is intended to improve delivery of services in BSL in Wales by ensuring availability of interpreters to public bodies.

#### 3.5.4.5 Bilingualism

A consultation on the Welsh Language Strategy<sup>72</sup> was completed in early 2011. The Welsh Language (Wales) Measure 2011 requires Welsh ministers to publish an annual action plan on how they will implement the Welsh Language strategy. The consultation response supported the Measure, and evidenced widespread support for increasing the use of the Welsh language and increasing the number of Welsh speakers. This will stimulate two demands, more high level translation and interpreting skills, and the need to develop and improve individuals' skills in the Welsh Language.

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<sup>71</sup> Welsh Assembly Government, 2010, Delivering Skills that work for Wales: A Labour Market Framework.

<sup>72</sup> Welsh Assembly Government, 2010, Living Language: A Language for Living.

## 4. UK Overview – current skill needs

### 4.1 Employer views on entrants to the labour market

This section examines whether those entering the UK labour market have sufficient language and intercultural working skills to meet employer demand.

#### 4.1.1 School and College leavers

The combination of an increasingly global economy and heightened cultural sensitivities means new demands are placed on individuals in the workplace. In 2010<sup>73</sup>, 44 per cent of employers were satisfied with the level of international cultural awareness among school and college leavers, but this fell to 37 per cent in 2011<sup>74</sup>, suggesting a continued skills gaps in international cultural awareness. This increase may be explained by the decline in numbers studying languages in school, but this cannot be confirmed, nor may it be the sole cause. The causes of dissatisfaction need to be further explored in order to address this deficit.

Weaknesses in foreign language skills are nothing new. As has already been reported in section 2.6, evidence suggests that the UK has poor foreign language competence compared to its international competitors<sup>75</sup>. Given the fall in the number of students taking a language at GCSE reported in section 2.7.3, this skills gap can be expected to widen in the short term. Although it is hoped that the introduction of the English Baccalaureate, or Ebacc, in November 2010 may lead to an increase in the take-up of languages at GCSE, it is too early to comment on the effect of this measure on employer demand for language skills. In a two year period the level of satisfaction with the foreign language skills offered by school and college leavers has fallen, with 27 per cent of employers satisfied with leavers' language skills in 2010, and 23 per cent in 2011.

Employer satisfaction with the basic use of English has also fallen slightly, with employers in 2011 being less satisfied (53 per cent) than those in 2010 (54 per cent) with the levels of literacy of school and college leavers.

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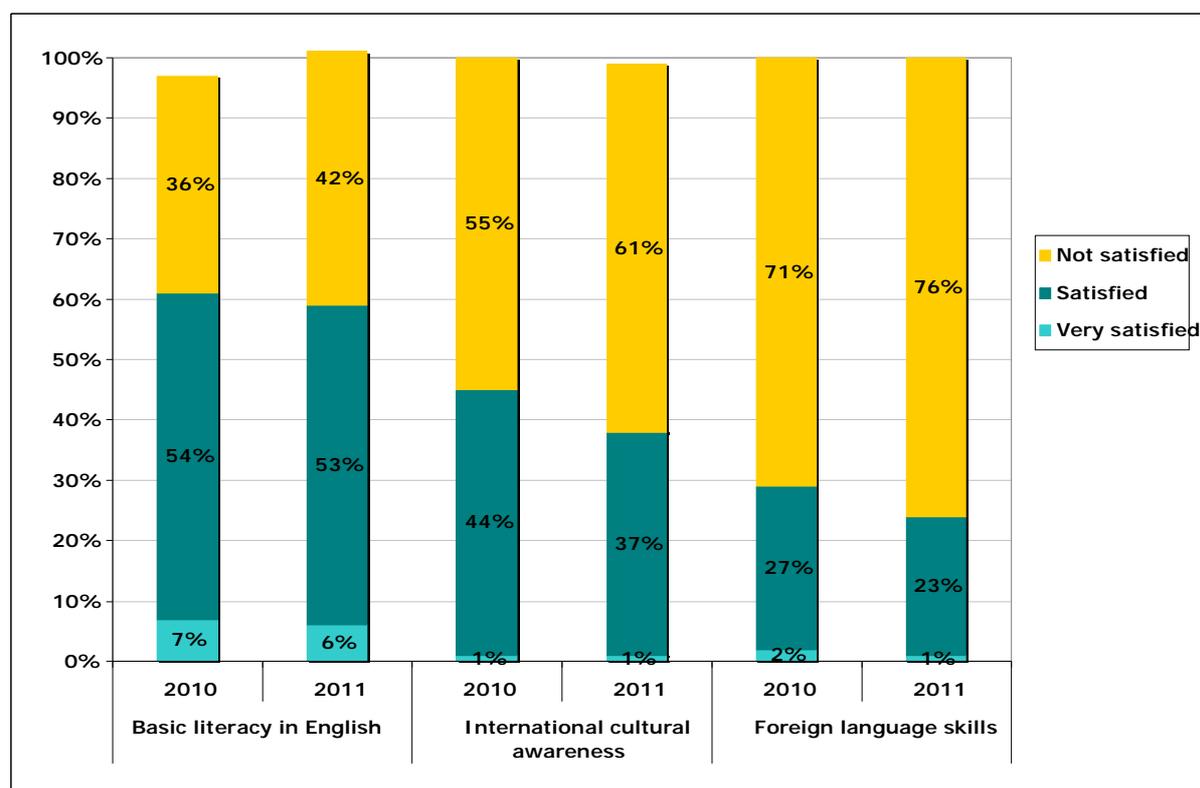
<sup>73</sup> Confederation of British Industry (CBI), 2010, Ready to Grow: Business priorities for education and skills, Education and skills survey 2010.

<sup>74</sup> Confederation of British Industry (CBI), 2011, Building for Growth: Business priorities for Education and Skills, Education and Skills Survey.

<sup>75</sup> CILT, the National Centre for Languages, 2005b, Talking Sense: a research study of language skills management in major companies.

## 4. UK Overview – current skill needs

Figure 4: Employer satisfaction with school and college leavers' employability skills (2010/11)



Source: CBI (2011) Education and Skills Survey 2011, page 22 and CBI (2010) Education and Skills Survey 2010, page 23

The overall perception of employers is that the level of language and international cultural awareness offered by school and college leavers has fallen across a two year period. There is much work to be done in ensuring that those who leave school and college have the necessary language and cultural skills for the world of work.

### 4.1.2 Graduates

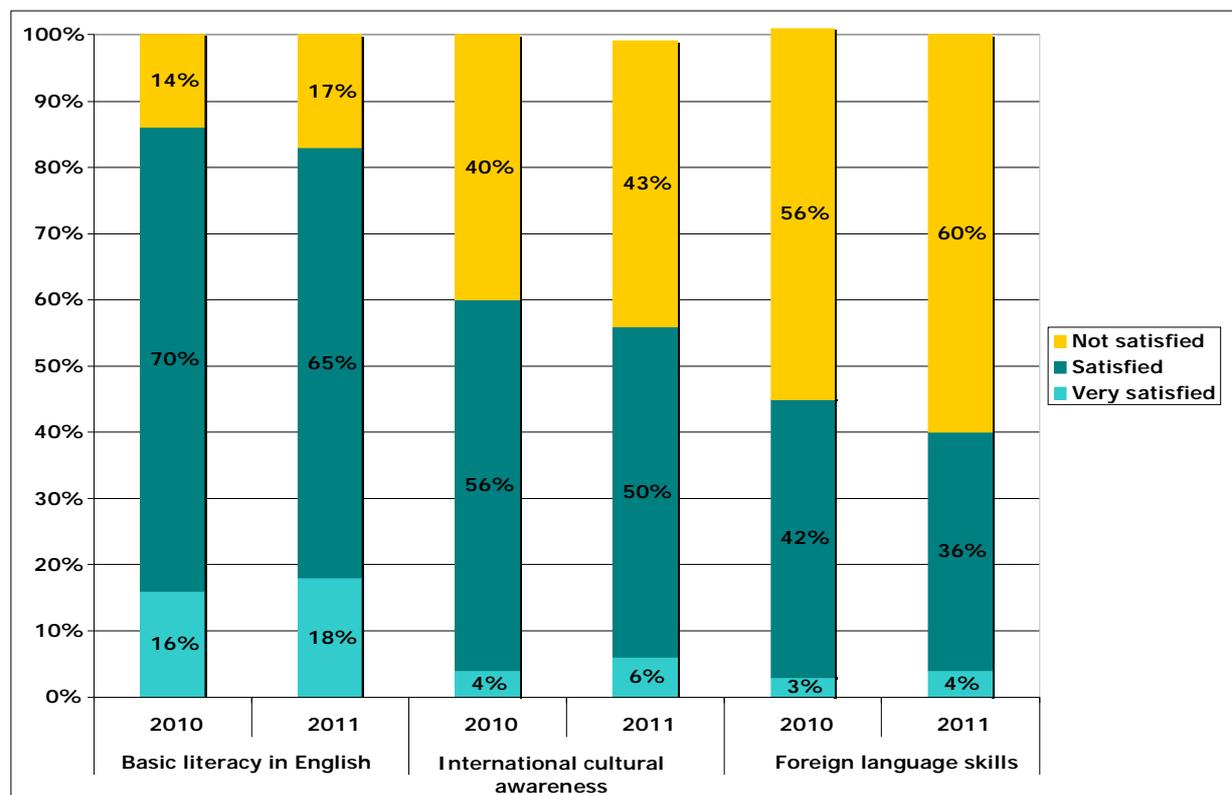
While employers exhibit higher levels of satisfaction with the employability skills of graduates than for school and college leavers, there is still considerable scope for improvement.

In 2010, only 56 per cent of employers were satisfied with the level of intercultural awareness offered by graduates. This fell to 50 per cent in 2011. Similarly, there was a 6 per cent fall in employer satisfaction with the foreign language skills offered by graduates, falling from 42 per cent in 2010 to 36 per cent in 2011.

In 2010, 70 per cent of employers were satisfied with graduates' basic literacy skills, but this fell to 65 per cent in 2011.

## 4. UK Overview – current skill needs

Figure 5: Employer satisfaction with graduates' employability skills (2010/11)



Source: CBI (2011) Education and Skills Survey 2011, page 24 and CBI (2010) Education and Skills Survey 2010, page 25

In conclusion, the two year period to 2011 has witnessed increasing levels of dissatisfaction with the language and international cultural awareness skills offered by those entering the labour market. A particular area for concern is the foreign language skills of graduates.

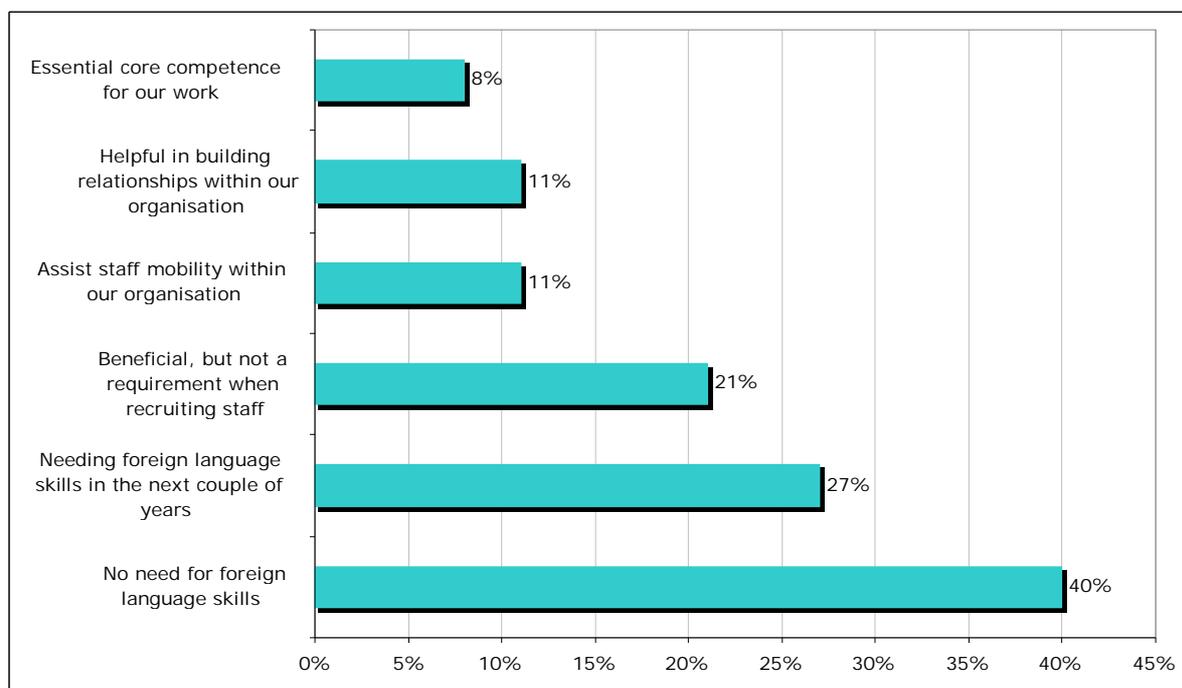
### 4.2 Demand for language skills

According to the CBI (2011) Education and Skills Survey, 40 per cent of organisations state that there is no need for foreign language skills in their organisation. This compares with approximately 78 per cent of organisations who report that foreign language skills will provide some benefit towards their organisation now and in the future. The report found that:

- 8 per cent said the ability to speak one or more foreign language is an essential core competence for their business
- 11 per cent said it provides help when building relationships within their organisation
- 11 per cent said it assists their staff mobility
- 21 per cent said it is a beneficial skill but not when recruiting
- 27 per cent said foreign language skills will become important over the next couple of years.

## 4. UK Overview – current skill needs

Figure 6: Need for employees who can speak a foreign language



Source: CBI (2011) *Education and Skills Survey 2011*, page 46

In a separate study, leading graduate employers ranked the ability to work collaboratively with a team of people from a range of backgrounds and countries as the most critical skill in an individual, closely followed by communication skills (both speaking and listening). Multilingualism was not viewed as an essential skill, but as a complementary skill, as was the ability to learn new skills in any culture.<sup>76</sup>

Research conducted between November 2010 and February 2011 reported that 4 per cent of all graduate level vacancies advertised on selected jobsites required a language skill.<sup>77</sup>

In a 2010 survey<sup>78</sup>, 65 per cent of employers were looking for conversational ability rather than language fluency when recruiting.

### 4.3 Demand for specific languages

English is the main language of business. However other European languages are also high in demand for businesses in the UK. The most requested languages are:

- French (61 per cent)
- German (52 per cent)
- Spanish (40 per cent)
- Polish (29 per cent)

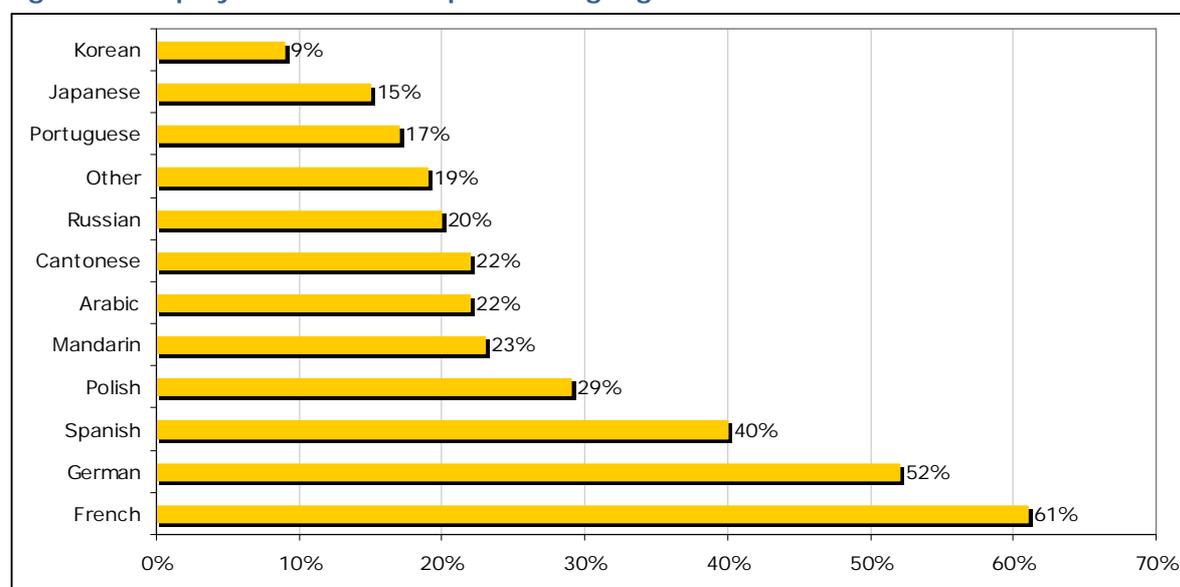
<sup>76</sup> CfE/Association of Graduate Recruiters, 2011, *Global Graduates into Global Leaders*.

<sup>77</sup> **University Council of Modern Languages (UCML)**, 2011, *Labour Market Intelligence on Languages and Intercultural Skills in Higher Education*.

<sup>78</sup> Confederation of British Industry (CBI), 2010, *Ready to Grow: Business priorities for education and skills*, *Education and skills survey 2010*, page 7.

## 4. UK Overview – current skill needs

Figure 7: Employer demand for specific language skills



Source: CBI (2011) Education and Skills Survey 2011, page 46

Recent intelligence on the labour market for graduates with language skills reported a similar bias towards requests for European languages.<sup>79</sup> The six most requested languages by employers were:

- French
- German
- Spanish
- Italian
- Dutch
- Swedish.

While the US is the UK's single largest export market (source: UKTI), Germany, the Netherlands, France and Ireland are still the principal European destinations for UK exports. The European Single Market is a significant trade factor. It is estimated that trade on the European Single Market is worth £3,300 a year to every British household.<sup>80</sup> According to the Food and Drink Federation, the Netherlands and Germany are the largest growth markets for UK food and drink products. In fact, Scotland experienced a significant growth in the Netherlands market in 2010<sup>81</sup>, making it the second biggest market for Scotland after the USA. Food and beverages are Scotland's biggest exports, so these figures can no doubt be linked.

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<sup>79</sup> University Council of Modern Languages (UCML), May 2011, Labour Market Intelligence on Languages and Intercultural Skills in Higher Education.

<sup>80</sup> Department for Business Innovation and Skills (BIS) / Department for International Development (DFID), 2011, The UK and the Single Market: Trade and investment analytical papers.

<sup>81</sup> National Statistics Scotland, 2012, Global Connections Survey 2010.

## 4. UK Overview – current skill needs

Table 7: Top 5 EU export partner member states, November 2011

Country	Total Emillions	% change from October 2011	% change from November 2010	% of total EU trade
Total exports	13,855.2	1.5	6.2	100.0
Germany	2,996.8	-3.5	13.2	21.6
Netherlands	2,101.5	10.4	13.4	15.2
France	2,088.4	-0.3	13.7	15.1
Irish Republic	1,584.4	7.8	1.7	11.4
Belgium	1,296.9	4.9	7.6	9.4

Source: HM Revenue & Customs Overseas Trade Statistics

The statistics therefore indicate that demand for these languages will remain high in future.

The 2010 CBI survey<sup>82</sup> also indicated that, while employers are still seeking traditional European languages such as French (49 per cent), they are also increasingly looking for Mandarin/ Cantonese (44 per cent).

### 4.4 Demand for specific occupations

#### 4.4.1 Interpreting and translation

Interpreting and translation are occupations which require a high level of language knowledge in the individual's native language and a second and/or third language. The continued decline in the numbers taking languages has already led to a shortage of native English interpreters and translators. In higher education, HEFCE has classified languages as a Strategically Important and Vulnerable Subject. This classification has led to HEFCE allocating funding to a project designed to promote language learning in general and the careers of interpreting and translation in particular, called Routes into Languages. This programme is backed by major employers of interpreters and translators, including international organisations.

International organisations such as the European institutions and the United Nations are already reporting a severe shortage of native English interpreters and translators.<sup>83</sup> English is a central language for ensuring mutual understanding in multilingual meetings in the EU, used additionally as a relay language between certain language pairs. The shortage is already forcing the EU Interpretation Directorate to refuse meetings or to limit the languages provided because they cannot find sufficient English interpreters.

#### 4.4.2 Language teaching

The decline in numbers studying languages in schools has led to some teachers leaving the profession. The introduction of new measures, such as the English Baccalaureate, and new qualifications such as the Languages Baccalaureate in Scotland, may require increased numbers of teachers to offer these qualifications. A wider range of languages available as qualifications also triggers a demand for teachers of particular languages

<sup>82</sup> Confederation of British Industry (CBI), 2010, Ready to Grow: Business priorities for education and skills, Education and skills survey 2010.

<sup>83</sup> University Council of Modern Languages (UCML), May 2011, Labour Market Intelligence on Languages and Intercultural Skills in Higher Education, pages 65-66.

## 4. UK Overview – current skill needs

e.g. Chinese. The TDA in England is working to increase the numbers of teachers in Chinese in particular, including exchange programmes with Chinese educational organisations.

### 4.4.3 Sales and trading roles

The University Council for Modern Languages' (UCML) research into the graduate labour market showed that 16 per cent of all vacancies requiring a language asked for French or German in a sales or trading role.<sup>84</sup> This indicates a strong link to language skills and sales.

### 4.4.4 Civil service

The UK Government are concerned at the level of influence that the UK can exert in negotiations and discussions at European level, as the UK is underrepresented in the European institutions at administrative and managerial level. Entrance requirements to work for the institutions require a second or even a third language, and this puts UK applicants at a disadvantage. According to the European Union, as of May 2011, only 5 per cent of the jobs in the European Commission are filled by UK nationals, despite the UK equating to 12 per cent of the European population.

## 4.5 Impact of poor language skills

A recent trade confidence survey<sup>85</sup> by the British Chambers of Commerce noted that firms looking to export require support with regard to cultural understanding.

British workers are disadvantaged in the European and global job markets if they do not speak another language. A recent survey by Regus<sup>86</sup> of 2,700 businesses reported that 57 per cent of companies appoint a local person rather than an expatriate to run operations overseas, limiting staff mobility and opportunities to work abroad. Only 35 per cent of employers would send a member of staff overseas to work, in part influenced by the lack of language skills on offer in UK employees.

Lack of confidence in language skills is also a barrier to UK participation in European work experience. Yet evidence shows that employers value the international experience of an individual with language skills. While the overall total number of outgoing students on Erasmus mobility study or work programmes has increased from 7,210 in 2004 to 11,724 in 2010, we have actually seen a decrease in the percentage of outgoing students compared to students from other countries. Therefore, our European counterparts are accessing far greater international opportunities than UK students, which ultimately could have a negative impact on their mobility in the job market.

The balance of UK trade is skewed towards countries which share English as a trading language. Recent research by UCML highlighted that the November 2010 trade statistics<sup>87</sup> reported that the UK had a trade surplus only with the USA, Australia, Ireland, Greece, Saudi Arabia, the UAE, and Portugal. In every other case the UK experienced trade deficits. The greatest surpluses were with English speaking countries.

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<sup>84</sup> University Council of Modern Languages (UCML), 2011, Labour Market Intelligence on Languages and Intercultural Skills in Higher Education.

<sup>85</sup> British Chambers of Commerce, 3<sup>rd</sup> Qtr 2011, Trade Confidence Index.

<sup>86</sup> Regus media release, 31 January 2012

<sup>87</sup> University Council of Modern Languages (UCML), 2011, Labour Market Intelligence on Languages and Intercultural Skills in Higher Education.

## 4. UK Overview – current skill needs

The same research reported that export businesses that proactively use language skills, and related cultural knowledge, achieve on average 45 per cent more sales. Furthermore it estimates that improving language skills could add up to £21 billion per year to the UK economy.

Often it is difficult for businesses to establish whether a deal or a contract could have been won if more linguistic or cultural skills were available. A recent CBI survey<sup>88</sup> indicated that we may not know the real impact of poor language skills, as the graphic below shows.

**Figure 8: 'Have you lost business due to inadequate foreign language skills?' (%)**



### 4.6 Future skill needs

Clearly the increased need for languages and intercultural skills in schools and college leavers and graduates, combined with the decline in numbers studying languages in schools and colleges, means this skills gap may continue for some time.

Policies such as the English Baccalaureate and new qualifications such as the Languages Baccalaureate in Scotland may not have an impact for several years in terms of meeting employer demands.

As a result of retirements among their staff and freelance interpreters, the EU institutions will be looking for approximately 250 English interpreters over the next ten years. The Directorate General of Interpretation of the European Commission alone will lose four English staff interpreters per year over the next 10 years, yet the current replacement rate is one per year. This presents a real recruitment concern for employers of specialist linguists and risks that 'international organisations will be unable to perform their vital tasks<sup>89</sup>, without a new generation of trained language professionals.

In the meantime, globalisation will continue, both in spite of and because of the economic situation worldwide. A global economy will continue to drive demand for languages and, increasingly, intercultural skills.

<sup>88</sup> Confederation of British Industry (CBI), 2010, Ready to Grow: Business priorities for education and skills, Education and skills survey 2010.

<sup>89</sup> in the so-called 'Paris Declaration', issued on 23 June 2010, the heads of language and conference services of 76 international organisations called for "the necessary budgetary resources" to be allocated to "effective succession planning" for upcoming staff retirements, as well as "pedagogical assistance activities" and examinations.

## 5. England – skills, qualifications and training

This section provides an overview of the workforce with languages and intercultural working skills in England.

### Terminology:

**Recruitment difficulties** refer to vacancies that employers describe as either hard-to-fill or skill-shortage related.

**Hard-to-fill vacancies (HtFVs)** are vacancies classified by employers as hard to fill.

**Skill shortage vacancies (SSVs)** are a subset of hard-to-fill vacancies where the reason given for the difficulty filling the position is a low number of applicants with the required skills, work experience or qualifications.

**Skill shortages** occur when organisations cannot recruit sufficient people who are appropriately qualified, skilled or experienced to fill the vacancies they have. Alternatively, hard to fill vacancies (HTFVs) occur because of other issues such as poor pay, conditions or location.

**Skill gaps** exist when members of the existing workforce in an organisation are seen to have lower skills than are necessary to meet current business needs.

**Unweighted base** refers to the number of respondents on which a survey is based

**Weighted base** ensures that the survey results are representative of the entire population of employers.

Filling vacancies and meeting identified gaps are important. At an organisational level, unfilled vacancies may make it difficult to meet quality standards and develop new products and services. At an economic level, they can affect competitiveness, productivity and even the decision to keep a business based in the UK, rather than base it overseas.<sup>90</sup>

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<sup>90</sup> UK Commission for Employment and Skills (UKCES), 2010, Ambitions 2020: World class skills and jobs for the UK, page 70.

## 5. England – skills, qualifications and training

### 5.1 Workforce profile and recruitment

#### 5.1.1 Recruitment difficulties by occupations

Interpreting, translation and language teaching are high-level skills. They require a high level of language knowledge. The decline in numbers studying languages is already leading to recruitment difficulties, forcing organisations to look overseas for specialist staff.

Qualified, highly skilled English native speaker interpreters and translators are in severe shortage. In addition, certain language combinations are also in severe shortage for interpreting and translation, leading to organisations being forced to use unqualified or inexperienced people where a qualified interpreter or translator is not available.

#### 5.1.2 Recruitment difficulties by regions

There is still a regional issue regarding recruitment, as employers in rural or more remote areas often report difficulties in finding language skills in either the resident or the migrant population. The high proportion of vacancies in London in general, as a centre for international banking and commerce, also means a disproportionately high number of vacancies for language skills.

#### 5.1.3 Reasons for recruitment difficulties

In interpreting and translation, the freelance nature of the work means that it is often difficult for people entering the professions to make a living. This can mean that people leave the profession and look for other careers, making it increasingly difficult for employers or clients to recruit suitably qualified or skilled staff.

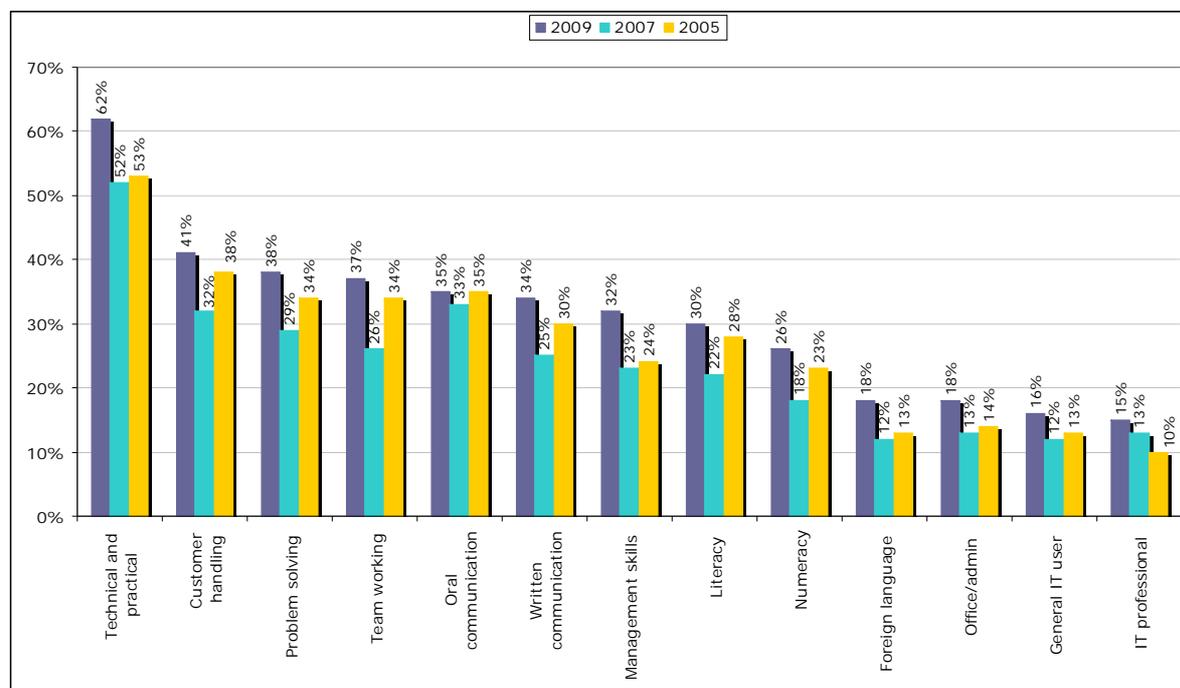
For roles where languages provide added value or are an underpinning skill, employers report that context-specific language knowledge is a barrier to recruitment (e.g. the employer may require someone with knowledge of German and chemical engineering, or an individual with knowledge of Korean and manufacturing).

### 5.2 Skills Shortages

The demand for language skills has increased since 2005. In 2005, foreign language skills were lacking in skill shortages vacancies for 13 per cent of organisations. Although this fell slightly to 12 per cent in 2007, it increased more significantly to 18 per cent in 2009.

## 5. England – skills, qualifications and training

Figure 9: Skills lacking where skill-shortage vacancies exist



Source: NESS employer survey, page 82

Although languages are reported as lacking in 18 per cent of skills-shortage vacancies, they are not reported as frequently as literacy, numeracy, management skills, communication skills and customer handling. However, they are reported as lacking just as frequently as administrative skills and more frequently than IT skills (in 2009, they were the 10th out of 13).

### 5.2.1 Skills shortage by occupation

Shortages in foreign language skills were more likely to occur in the following occupations:

- elementary staff (30 per cent)
- professionals (28 per cent)
- personal services (19 per cent)
- sales and customer service (19 per cent).

## 5. England – skills, qualifications and training

Table 8: Main skills lacking by occupation where skill-shortage vacancies exist

(%)	Overall	Managers	Professionals	Associate professionals	Administrative	Skilled trades	Personal services	Sales and customer service	Machine operatives	Elementary
<i>Unweighted base</i>	5,118	300	1,035	1,098	328	614	585	356	311	440
<i>Weighted base (SSVs in occupations)</i>	2,450	243	338	542	231	394	294	215	156	233
<i>Weighted base (SSVs)</i>	63,089	3,735	8,303	12,693	4,573	8,908	9,123	5,480	2,908	6,3932
Technical and practical	62	60	76	55	51	73	60	51	73	59
Customer-handling	41	40	37	36	49	28	45	56	24	60
Team working	37	25	31	31	33	41	42	41	26	54
Oral communication	35	27	17	26	46	38	46	49	27	44
Problem solving	38	39	45	28	39	42	38	41	21	45
Written communication	34	29	19	29	47	39	40	45	22	36
Management	32	63	29	33	30	37	24	34	11	32
General IT user	16	18	9	16	31	13	15	22	9	11
Literacy	30	30	14	26	39	35	35	41	20	28
Office admin	18	19	11	24	40	11	17	22	7	12
Numeracy	26	23	11	21	40	34	27	31	18	29
IT professional	15	13	13	15	28	10	12	20	6	19
Foreign languages	18	11	28	13	17	13	19	19	8	30

Source: UKCES (2010) National Employer Survey for England 2009, page 84

### 5.3 Skills Gaps

#### 5.3.1 Skills gaps by occupation

The demand for foreign language skills has increased from 2003 to 2009. In 2003, 7 per cent of employers in England stated that foreign language skills were lacking; this increased to 9 per cent in 2005 and remained stable during 2007. In 2009 the number increased again to 13 per cent.<sup>91</sup>

Across the various occupations, foreign language skills were lacking (and higher than the national average) for the following organisations:

- machine operative (21 per cent)
- elementary (16 per cent)
- professionals (15 per cent).

<sup>91</sup> UK Commission for Employment and Skills (UKCES), 2010, National Employer Survey for England 2009, page 119.

## 5. England – skills, qualifications and training

Table 9: Skills lacking by occupational group

(%)	2009	Managers	Professionals	Associate Professionals	Administrative	Skilled trades	Personal services	Sales and Customer Service	Machine operatives	Elementary
Technical and practical	64	48	78	77	62	75	63	59	71	64
Customer-handling	51	43	41	48	51	33	52	70	29	57
Team working	50	57	44	49	45	37	55	45	58	57
Oral communication	46	45	42	42	45	33	48	48	45	52
Problem solving	46	48	49	49	49	42	46	42	54	42
Written communication	37	39	41	44	45	30	47	29	41	30
Management	36	77	53	44	29	23	28	20	28	21
General IT user	28	33	33	32	48	20	27	25	28	16
Literacy	24	14	17	23	25	20	39	18	36	29
Office admin	22	28	23	25	52	12	17	16	17	12
Numeracy	21	11	16	19	21	19	27	17	35	28
IT professional	17	23	22	28	28	10	16	13	12	9
Foreign languages	13	10	15	11	11	6	13	12	21	16

Source: UKCES (2010) National Employer Survey for England 2009, page 119

### 5.3.2 Skills gaps by Sector Skills Council

There are a number of Sector Skills Councils (SSC) that reported gaps in foreign language skills that were higher than average:

- Go Skills (35 per cent)
- Skillfast (29 per cent)
- E-skills (27 per cent)
- Improve (27 per cent)
- Financial Services Skills Council (22 per cent)
- Skillfast (20 per cent)
- People 1st (17 per cent)
- Asset Skills (16 per cent)
- Skills for Care and Development (15 per cent)
- Proskills (14 per cent)
- Skills for Logistics (14 per cent).

## 5. England – skills, qualifications and training

Table 10: Nature of skills gaps by SSC Sector

(%)	Technical and practical	Customer-handling	Team working	Oral communication	Problem-solving	Written communication	Management	General IT skills	Literacy	Office admin	Numeracy	IT professional	Foreign language skills
Overall	64	51	50	46	46	37	34	28	24	22	21	17	13
Asset Skills	61	48	45	50	37	50	38	27	27	26	19	18	16
Cogent	69	40	57	48	54	40	28	34	25	22	31	14	10
Construction Skills	62	40	43	37	41	37	40	33	15	19	17	18	7
Creative and Cultural Skills	59	48	43	45	42	34	43	33	21	26	19	20	13
Energy and Utility Skills	70	55	64	63	62	66	33	42	43	15	25	20	2
e-skills UK	71	59	32	55	57	45	51	14	10	20	9	25	29
Financial Skills Partnership	81	65	43	43	39	38	34	35	15	22	14	29	22
GoSkills	43	71	77	76	69	69	45	62	55	52	52	25	35
Government Skills	62	64	66	55	49	58	59	42	38	48	25	27	2
SEMTA	76	32	52	42	55	40	41	37	27	25	26	19	12
IMI	68	43	32	39	40	28	24	30	24	24	19	17	10
Improve Ltd	75	19	54	51	52	44	26	32	34	14	38	14	27
Lantra	75	40	40	37	40	27	26	24	21	19	21	15	8
Lifelong Learning UK	76	38	45	33	39	30	39	43	25	30	22	28	8
People 1 <sup>st</sup>	59	69	57	51	48	26	33	16	21	14	24	11	17
Proskills UK	75	32	49	36	54	27	28	30	22	18	29	17	14
Skills Active	65	62	57	48	44	34	30	22	17	19	17	13	8
Skillfast-UK	52	42	43	46	36	37	27	27	29	18	32	14	20
Skillset	66	44	50	51	55	33	57	36	15	29	15	29	9
Skillsmart Retail	53	63	53	47	44	24	25	19	17	14	16	8	9
Skills for Care & Development	64	50	48	44	51	51	35	35	31	23	20	19	15
Skills for Health	64	51	55	43	43	41	37	31	32	27	25	21	11
Skills for Justice	60	45	41	59	59	66	54	38	22	48	17	18	7
Skills for Logistics	62	42	57	47	49	39	34	30	30	26	25	16	14
Summit Skills	74	32	33	27	36	28	24	23	18	19	19	17	4

Source: UKCES (2010) National Employer Survey for England 2009, page 125

### 5.3.3 Skills gap by sector

There are a number of sectors where foreign language skills are particularly lacking:

- Financial intermediation (22 per cent)
- Transport, storage and communications (19 per cent)
- Hotels and catering (17 per cent)
- Manufacturing (14 per cent).

## 5. England – skills, qualifications and training

Table 11: Nature of skills gaps by SSC sector

(%)	Technical and practical	Customer-handling	Team working	Oral communication	Problem-solving	Written communication	Management	General IT skills	Literacy	Office admin	Numeracy	IT professional	Foreign language skills
Overall	64	51	50	46	46	37	34	28	24	22	21	17	13
Agriculture	73	34	40	38	40	24	27	22	19	15	19	13	9
Mining and quarrying	77	53	16	17	13	16	17	13	5	53	3	1	-
Manufacturing	73	29	52	45	53	39	37	35	29	23	30	17	14
Electricity, gas and water	53	25	53	32	32	43	32	36	9	21	1	1	3
Construction	68	35	41	34	40	32	31	28	18	19	21	14	6
Retail and wholesale	57	57	51	45	43	27	26	23	19	18	18	11	10
Hotels and catering	60	69	58	52	47	25	33	17	22	13	24	12	17
Transport, storage and communications	55	58	67	55	62	53	36	37	37	32	30	18	19
Financial intermediation	81	65	43	43	39	38	34	35	15	22	14	29	22
Business services	61	47	41	45	42	42	41	29	19	24	14	22	13
Public administration and defence	57	58	54	52	46	49	48	36	24	40	15	19	4
Education	72	38	48	37	40	34	36	40	30	25	23	27	10
Health and social work	66	52	51	43	49	44	37	33	32	26	22	21	13
Other services	67	56	55	51	48	40	39	32	28	18	25	24	9

Source: UKCES (2010) National Employer Survey for England 2009, page 122

### 5.3.4 Skills gaps by region

Foreign language skills are reported as lacking on average in 13 per cent of vacancies. Regions reporting skills gaps in foreign languages above this average are the East of England (14 per cent) and London (28 per cent).

## 5. England – skills, qualifications and training

Table 12: Skills lacking by Region

(%)	Overall	East	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire and the Humber
<i>Unweighted base</i>	158,759	13,376	10,722	26,200	7,685	16,664	29,095	22,975	21,585	10,457
<i>Weighted base (00s)</i>	1,369	134	93	225	51	156	259	175	168	109
Technical and practical skills	64	63	61	60	56	64	68	66	65	60
Customer-handling	51	50	46	62	55	51	45	49	47	54
Team working	50	53	55	59	49	56	42	43	44	51
Oral communication	46	51	48	27	51	53	37	37	36	49
Problem solving	46	51	50	53	52	52	38	38	43	46
Written communication	37	42	36	47	40	41	29	31	29	40
Management	34	33	33	49	37	31	32	29	32	30
General IT user	28	26	28	32	34	30	25	26	36	25
Literacy	24	26	23	31	30	29	17	18	21	26
Office admin	22	23	22	27	24	26	20	17	20	20
Numeracy	21	23	22	22	28	26	15	20	20	22
IT professional	17	13	13	21	26	16	15	17	25	10
Foreign languages	13	14	13	28	8	11	7	8	8	9

Source: UKCES (2010) National Employer Survey for England 2009, page 130

### 5.3.5 Reason for skills gaps

It is difficult to provide a definitive reason for skills gaps. Reasons could include the decline in numbers studying languages or the content of language qualifications not meeting employer requirements (in particular, general language qualifications such as GCSE and A-levels). However, this needs to be explored further before reasons can be confirmed.

### 5.4 Apprenticeships

There are currently no apprenticeships available in languages, intercultural working skills, interpreting or translation.

Some QCF language qualifications appear in certain apprenticeship frameworks.

### 5.5 Training and Qualifications

As of 11 July 2011, there were 1,016 qualifications classified in category 12.2: *Other Languages, Literature and Culture* on Ofqual's Register of Regulated Qualifications for England, Northern Ireland and Wales. This includes QCF qualifications, general language qualifications, other general language qualifications, 14-19 Diplomas and qualifications for deaf and deafblind awareness.

Qualifications are available from entry to Level 7 in languages and related professions.

Language qualifications range from entry to Level 4. Interpreting qualifications feature at Level 6 and there is a Level 7 Diploma in Translation available.

Entry level qualifications are available in 22 languages. Vocational qualifications, on the Qualifications and Credit Framework, are available from levels 1 to 4 in 18 languages.

General language qualifications, including GCSE and A level, are offered in 19 languages.

## 5. England – skills, qualifications and training

Other non-accredited qualifications exist (e.g. iGCSEs), in some languages but these are predominantly offered to the international market.

### 5.6 Future skill needs

It is anticipated that foreign language skills will become more important for the following occupations:

- professionals (13 per cent)
- managers (12 per cent)
- elementary (12 per cent)

**Table 13: Skills needing development, by occupation**

(%)	Overall	Managers	Professionals	Associate professionals	Administrative	Skilled trades	Personal services	Sales and customer service	Machine operatives	Elementary
<i>Un-weighted base</i>	52,119	19,480	4,362	3,348	4,503	5,561	3,051	6,246	2,444	3,124
<i>Weighted base (00s)</i>	937,597	414,256	62,479	50,718	81,603	87,090	51,189	106,057	28,365	55,841
Technical and practical skills	63	56	74	80	57	80	71	60	74	64
Management	38	45	41	36	32	26	34	39	20	30
General IT user	37	41	39	37	57	26	29	35	21	23
Customer-handling	37	30	28	35	37	31	48	63	29	57
Problem solving	35	33	33	37	34	36	42	42	33	41
Team working	35	30	31	31	30	31	54	45	37	54
Communication	32	27	27	33	34	26	48	45	30	47
Oral communication	27	22	22	25	27	22	42	40	25	43
IT professional	24	27	35	33	35	16	13	17	9	11
Office admin	23	24	17	17	39	14	18	26	12	15
Written communication	21	18	19	23	23	17	32	24	18	24
Numeracy	14	12	12	11	14	11	17	17	14	24
Literacy	13	10	12	12	14	12	22	15	13	21
Foreign languages	11	12	13	8	10	6	11	10	5	12

Source: UKCES (2010) National Employer Survey for England 2009, page 151

## 6. Northern Ireland – skills, qualifications and training

This section provides an overview of the workforce with languages and intercultural working skills in Northern Ireland.

### 6.1 Workforce profile and recruitment

UK-wide workforce surveys conducted by the CBI and the British Chambers of Commerce do not provide data specific to Northern Ireland and therefore it is not possible to extract data on the workforce profile for Northern Ireland. However, these surveys cover the four UK nations, so data on needs should be assumed as indicative of the UK rather than specific to one nation.

### 6.2 Skills shortages

The Northern Ireland Skills Monitoring Survey 2008<sup>92</sup> does not measure data related directly to languages and intercultural skills, therefore it is not possible to extract robust data on shortages.

### 6.3 Skills gaps

#### 6.3.1 Skills gaps by occupation

The Northern Ireland Skills Monitoring Survey 2008 does not measure data related directly to languages and intercultural skills when measuring skills gaps. However, it does monitor data related to foreign language training.

Of the off-the-job training establishments surveyed, 3 per cent are providing foreign language training<sup>93</sup>.

#### 6.3.2 Skills gaps by sector

Of the off-the-job training establishments who are providing foreign language training, the sector breakdown is shown in the figure below.

**Table 14: Percentage of training per sector in foreign languages – Northern Ireland**

Sector	% of training offered to foreign languages
Manufacturing	2
Hotels & restaurants	1
Transport & communications	5
Financial services	1
Business services	1
Public administration	6
Education	11
Health & social care	4
Other services	4

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<sup>92</sup> IFF Research Ltd, November 2009, Northern Ireland Skills Monitoring Survey 2008.

<sup>93</sup> Ibid, page 82.

## 6. Northern Ireland – skills, qualifications and training

### 6.4 Apprenticeships

There are currently no apprenticeships available in languages, intercultural working skills, interpreting or translation.

Some QCF language qualifications appear in certain apprenticeship frameworks.

### 6.5 Training and qualifications

As of 11 July 2011, there were 1,016 qualifications classified in category 12.2: *Other Languages, Literature and Culture* on Ofqual's Register of Regulated Qualifications for England, Northern Ireland and Wales. This includes QCF qualifications, general language qualifications, other general language qualifications, 14-19 Diplomas and qualifications for deaf and deafblind awareness.

Qualifications are available from entry to Level 7 in languages and related professions.

Language qualifications range from entry to Level 4. Interpreting qualifications feature at Level 6 and there is a Level 7 Diploma in Translation available.

Entry level qualifications are available in 22 languages. Vocational qualifications, on the Qualifications and Credit Framework, are available from levels 1 to 4 in 18 languages.

General language qualifications, including GCSE and A level, are offered in 19 languages.

### 6.6 Future skill needs

There is no robust data available on future needs for languages and intercultural skills in Northern Ireland.

However, Northern Ireland is still subject to the skills needs created by the global economy. Its migrant workforce creates a demand for the intercultural skills required by managers, supervisors and team members.

Its tourism industry also creates a specific need for languages and intercultural skills.

Derry-Londonderry has been voted the first UK City of Culture in 2013, which could lead to increased visitor numbers. This in turn could lead to an increased need for language and intercultural skills.

## 7. Scotland– skills, qualifications and training

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This section provides an overview of the workforce with languages and intercultural working skills in Scotland.

### 7.1 Workforce profile and recruitment

UK-wide workforce surveys conducted by the CBI and the British Chambers of Commerce do not provide data specific to Scotland and therefore it is not possible to extract data on the workforce profile for Scotland. However, these surveys cover the four UK nations, so data on needs should be assumed as indicative of the UK rather than specific to one nation.

### 7.2 Skills shortages

The Scotland Skills Survey 2010 does not include foreign languages as a specific skill when interrogating respondents on skills shortages. As a result, there is no specific data to offer for Scotland in this regard.

### 7.3 Skills gaps

The Scotland Skills Survey 2010 does not include foreign languages as a specific skill when interrogating respondents on skills gaps. As a result, there is no specific data to offer for Scotland in this regard.

### 7.4 Apprenticeships

There are currently no Modern Apprenticeships available in languages, intercultural working skills, interpreting or translation.

### 7.5 Training and qualifications

#### 7.5.1 Standard grade, Highers, Advanced Highers

Languages are available at a range of levels – from Access 2 (SCQF level 2) to Advanced Higher (SCQF level 7).

#### 7.5.2 Language Baccalaureate

The Language Baccalaureate was introduced in the 2009-2010 academic year. It is based on a coherent group of subject at Higher and Advanced Higher level with the addition of an Interdisciplinary Project.

#### 7.5.3 Higher National units

There are currently 79 units available in 6 languages.

#### 7.5.4 Higher education

Modern languages are offered in 741 university courses in Scotland at undergraduate level from autumn 2012. Modern languages are offered as a single honours subject or as joint honours with another subject.

Intercultural Skills are offered at undergraduate level at two universities in Scotland from autumn 2012.

### 7.6 Future skill needs

The 2014 Commonwealth Games will take place in Glasgow and may present the need for additional language skills and some intercultural working skills for certain job roles. This will be particularly relevant to customer facing roles related to the event itself (e.g.

## 7. Scotland– skills, qualifications and training

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stewards), and to the hospitality, tourism and transport industries providing a service for visitors to the event.

Financial service, tourism and the food and beverage sectors are all a major contribution to industry in Scotland. As research indicates, these are sectors that request language and intercultural skills for trade and customer service roles. It is therefore anticipated that current demand trends will continue.

Scotland's exports to Europe contribute many millions to its economy, with the Netherlands, France and Germany purchasing several millions in products. Exports could be further increased with improved language and intercultural skills, for these and other language markets.

The decline in numbers taking languages at Higher grade will hopefully be mitigated to some extent by the introduction of the Languages Baccalaureate and therefore ensure there is a continued supply of linguists for employment in Scotland and the wider world.

## 8. Wales – skills, qualifications and training

This section provides an overview of the workforce with languages and intercultural working skills in Wales.

### 8.1 Workforce profile and recruitment

UK-wide workforce surveys conducted by the CBI and the British Chambers of Commerce do not provide data specific to Wales and therefore it is not possible to extract data on the workforce profile for Wales. However, these surveys cover the four UK nations, so data on needs should be assumed as indicative of the UK rather than specific to one nation.

### 8.2 Skills shortages

The Future Skills Wales report from 2005 does not include foreign languages as a specific skill when interrogating respondents on skills shortages. However, it does survey respondents on Welsh language skills.<sup>94</sup>

13 per cent of establishments that responded report Welsh languages skills as a skill shortage. This was balanced across all businesses, including microenterprises, SMEs and non-Welsh owned organisations.

### 8.3 Skills gaps

#### 8.3.1 Skill gaps by occupation

Table 15: Skills required for skills shortage vacancies by occupation - Wales

	Total (%)	Professional (%)	Associate professional (%)	Skilled trades (%)	Sales & customer service (%)	Transport & machine operatives (%)
General IT user skills	14	16	13	15	8	14
IT professional skills	13	20	17	10	7	4
Other technical & practical skills	50	31	52	70	21	74
Communication skills	43	13	49	39	66	39
Customer handling skills	47	12	58	41	67	40
Team working skills	36	6	42	37	20	44
Problem solving skills	38	19	48	45	35	44
Management skills	27	54	35	21	5	15
Using numbers	27	14	21	27	36	37
Literacy skills	31	11	30	34	19	43
Welsh language skills	11	3	9	18	7	5
Work experience	4	6	6	3	1	-
Lack of qualifications	5	5	14	3	1	1
Other	3	5	5	-	15	
Don't know	15	18	9	9	27	10

<sup>94</sup> GfK NOP Research/FSW Partnership, December 2005, Future Skills Wales Sector Skills Survey.

## 8. Wales – skills, qualifications and training

### 8.3.2 Skill gaps by sector

Table 16: Most common types of skills gaps by sector

Type of skills gap	Most common in
Communication skills	Transport/communication, Production, Wholesale/Retail
Customer handling skills	Hotels/Catering, Wholesale/Retail
Team working	Hotels/Catering, Other Service, Production
Problem solving skills	Construction, Hotels/Catering
Technical and practical skills	Production, Other Services, Construction
General IT user skills	Public Admin/Education/Health, Banking/Insurance/Other Financial Services
Management skills	Production, Banking/Insurance/Other Financial, Hotel/Catering
Literacy	Public Admin/Education/Health, Construction
Using numbers	Hotels/Catering, Other Services
IT professional skills	Public Admin/Education/Health, Banking/Insurance/Other Financial Services
Welsh language skills	Public Admin/Education/Health, Hotels/Catering
Work experience	Public Admin/Education/Health, Banking/Insurance/Other Financial Services
Sales/marketing skills	Transport/Communication
Time management/keeping	Hotels/Catering
Motivation/behaviour	Hotels/Catering

Source: FSW (2005), page 65

## 8.4 Apprenticeships

There are currently no apprenticeships available in languages, intercultural working skills, interpreting or translation.

Some QCF language qualifications appear in certain apprenticeship frameworks.

## 8.5 Training and qualifications

As of 11 July 2011, there were 1,016 qualifications classified in category 12.2: *Other Languages, Literature and Culture* on Ofqual's Register of Regulated Qualifications for England, Northern Ireland and Wales. This includes QCF qualifications, general language qualifications, other general language qualifications, 14-19 Diplomas and qualifications for deaf and deafblind awareness.

Qualifications are available from entry to Level 7 in languages and related professions. They are available for learners aged 14 to 19, and 19+.

Language qualifications range from entry to Level 4. Interpreting qualifications feature at Level 6 and there is a Level 7 Diploma in Translation available.

Entry level qualifications are available in 22 languages. Vocational qualifications, on the Qualifications and Credit Framework, are available from levels 1 to 4 in 18 languages.

General language qualifications, including GCSE and A level, are offered in 19 languages.

Other non-accredited qualifications exist, e.g. iGCSEs, in some languages but these are predominantly offered to the international market.

### 8.5.1 Welsh Baccalaureate

The Welsh Baccalaureate is available for students aged 14 to 19 in Wales.

## 8. Wales – skills, qualifications and training

It combines personal development skills with existing qualifications, such as A levels, NVQs and GCSEs, to make one wider award that is valued by employers and universities.

The Welsh Baccaalaureate provides a broader learning experience than traditional programmes.

It is available at three levels:

Level	Options level
Foundation diploma	D-G grade at GCSE, NVQ level 1, or equivalent
Intermediate diploma	A* - C grade at GCSE, or NVQ level 2, or equivalent
Advanced diploma	GCE A Level standard, or NVQ level 3, or equivalent

It can be studied in English or Welsh, or a combination of the two languages.

The Welsh Baccaalaureate contains a language module. In this module, students are required to complete an approved method of self-assessment, (e.g. European Language Portfolio), recording the progress of their language skills in any language.

### 8.6 Future skill needs

Hospitality and tourism continue to be strong sectors for Wales, generating a demand for language and intercultural skills.

As well as the need for foreign language and intercultural skills presented by the global economy and its multicultural workforce, Wales also has additional language skill requirements presented by the Welsh Language strategy's aim to increase the number of people who both speak and use the language.

## 9. Languages, intercultural skills and the UK economy

### 9.1 Occupational change and employment projections

It is difficult to accurately predict occupational change for pan-sector skills. Occupational change is more directly related to the sector in which the individual is applying their language or intercultural skills.

### 9.2 Redundancy and recession

All sectors are subject to cuts and job losses in the current climate. While public sector employment has fallen considerably and the private sector is expected to grow to compensate, this is causing great uncertainty in the job market.

Employment statistics reported in January 2012<sup>95</sup>, for the period of three months to November 2011, showed that unemployment in England had risen to 8.4 per cent, the highest figure since January 1996. Youth employment was reported at record levels, with 22.3 per cent of 16 to 24 year olds out of work. The figures showed the private sector was not compensating for job losses in the public sector, with the private sector creating 5,000 jobs in comparison to 67,000 public sector jobs that were lost in the period.

The public sector cuts in England have had a particular impact on language teaching. Local authority advisers, previously present in all local authorities, offered support to teachers of all subjects in schools across their regions. With funding withdrawn from local authorities and directed to schools themselves, advisers across the country and across all subjects lost their jobs. This has created a gap in the support offered to language teachers, which will need to be filled by other models.

Cuts to other areas of the public sector are anticipated to lead to further cuts in the budgets allocated for language service provision. The Ministry of Justice has currently renegotiated the contract for supplying interpreting and translation services to the Criminal Justice System with a view to reducing operational costs, and there is anecdotal evidence that this is driving pay rates down in the sector.

In Scotland, the number of people out of work during the reported period rose to 8.6 per cent. In Wales, unemployment fell by 1,000 to give a rate of 8.9 per cent, while in Northern Ireland it fell by 7,000 to give a jobless rate of 6.8 per cent.

#### Self employment

The numbers in self employment rose between July and September 2011<sup>96</sup> to 4.09 million, a rise of 100,000. According to ONS, this is the highest number of self-employed people since comparable records began in 1992. This may indicate that significant numbers of people who have been made redundant during this recession have started their own businesses or registered as self-employed to generate income. This may be out of choice, or due to the inability to find other employment.

Interpreting and translation are predominantly freelance professions, and it is likely that trend to work freelance will continue, as employers look for more flexible working models when outsourcing professional services.

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<sup>95</sup> Office for National Statistics (ONS), January 2012, Labour Market Statistics.

<sup>96</sup> Office for National Statistics (ONS), November 2011, Labour Market Statistics.

## 9. Languages, intercultural skills and the UK economy

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However, it remains positive that individuals with language and intercultural skills have an added value skill to offer employers when looking for work.

## 10. The way forward

### 10.1 Perception of languages and intercultural skills

Languages and intercultural skills are not widely accorded a high status by Government or society. Although their value is recognised by many, the myth of 'English is enough' and 'everyone else speaks English' is perpetuated in certain sections of the media and society. It is important to reiterate at every opportunity the research highlighted in this report, to ensure that the UK is not left behind the rest of the world linguistically or culturally.

Often, languages are viewed as a subject for gifted and talented students, or for more privileged groups of students. Certainly, languages are more commonly taught now in independent schools than in maintained schools, and this further reinforces the latter perception.

However, languages are not just a subject for high achievers or the privately educated – languages and culture can inspire learners of all ages and all interests. Language learning and intercultural skills development can benefit any individual's career.

The assumption that English is the only language the UK needs is furthered by its popularity as a subject with other nationals, and media stories about the numbers of people wishing to come to the UK to study or work. English-language universities dominate the world rankings every year, and it is easy to assume that English is the only language one might ever need. But the research shows that this assumption damages both our trade balances and our job prospects.

Languages and intercultural skills are not just important for large organisations. Research shows that they play a part in the success of organisations of every size, from microbusinesses to multinationals. Export growth and overseas markets are critical to most sectors of the UK economy, and play a key part in reducing our trade deficit.

Languages and intercultural skills can help a business operate to its full potential. They can help a business buy or sell. Employers report that vacancies that require language skills often have to be filled by overseas nationals, which demonstrates that the demand exists but cannot always be met. This damages the career prospects of the UK workforce.

The number of language learners has declined over the last decade, in all phases of education. Our presence, and therefore our influence, in the European Union institutions is dwindling. And yet, Europe as a bloc remains our most important market. Languages must continue to be offered to a wide range of students and abilities to ensure that the varied needs of UK employers are met. It is vital that the supply of language learners is increased to meet demand.

**Recommendation 1: ensure that a range of language qualifications, both general and vocational (based on National Occupational Standards), continue to be made available to a wide range of learners.**

### 10.2 Promoting languages and intercultural skills

There are efforts to counteract the damage inflicted on UK economy and society by underperformance in language skills.

## 10. The way forward

Governments across the UK reiterate the importance of languages and are introducing a range of policies and programmes designed to stimulate language learning or promote language achievement. Other existing projects to promote language learning, such as Routes into Languages, continue to be funded in the short term so that good practice and successful models can be embedded beyond the life of the funding. However, there is no guarantee of further funding, so sustainable models must be created where possible.

In England, 2011 saw a new campaign to promote languages. Speak to the Future brought together several high profile supporters from academia and professional bodies, including the British Academy and the Chartered Institute of Linguists, to work to promote the benefits of languages. The campaign also gathered support from the business community, including high profile financial institutions, and educational institutions who are working with the campaign to promote the benefits of languages for society and employment. The campaign covers all languages and hopes to extend its activities to the other UK nations.

It is hoped that this campaign, which is collating arguments to lobby government and policy makers, can continue to raise the profile of languages and support efforts to stimulate take-up of languages and improve intercultural awareness.

**Recommendation 2: support campaigns to promote languages and stimulate take-up.**

**Recommendation 3: carry out an annual analysis of trends in secondary and higher education to track the impact that these policies and programmes have on take-up and achievement.**

**Recommendation 4: support campaigns which promote interpreting and translation as professions, and seek greater recognition of professional standards.**

### 10.3 Meeting the needs of employers

Employers are not just looking for fully fluent linguists. They also place a high value on individuals with conversational ability in languages and individuals who can demonstrate good general cultural awareness from their international or multicultural experience. The UK Occupational Language Standards provide an excellent framework to capture the different skills and competences employers require for various job roles.

Support for flexible language learning continues to be important. As Lord Dearing stated in his Languages Review in December 2006, one method of language learning does not suit everyone. Not all language qualifications meet the same needs either – we are fortunate in the UK that our awarding organisations have developed a comprehensive range of general and vocational qualifications to meet a range of employer and provider needs. Employers who report that general language qualifications don't provide the context or sector specific language knowledge they need should be supported in accessing appropriate language training and accreditation for their employees.

**Recommendation 5: ensure that National Occupational Standards are kept up to date to capture employer requirements for language competence.**

## 10. The way forward

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**Recommendation 6: offer support to awarding organisations in providing a range of qualifications to meet employer needs.**

**Recommendation 7: provide advice and guidance to employers to help them access language training for employees.**

### 10.4 Making the case

Employers can send out mixed messages about the value of language learning and developing intercultural skills.

There are employers who reiterate the value of language and cultural skills to their business, both externally and internally. There is economic evidence of the value they offer. But there is no longer a coordinating source of this information, converting this evidence into careers guidance for those looking to add a language to their skillset, or trying to find out information about careers with languages.

The cuts in funding for careers guidance and advice, combined with the change in remit of CILT, the former National Centre for Languages, has left a gap in specialist guidance for languages and intercultural skills. Without an organisation to coordinate the careers information, case studies and employer evidence of demand, we risk a further decline in the numbers studying languages and reduced mobility of the UK workforce.

It is therefore important to maintain labour market intelligence on languages and intercultural skills and to collect evidence on the size and scope of the labour market requiring languages and intercultural skills. This information is essential to the development of qualifications and training programmes.

It is also essential to monitor the value of languages and intercultural skills to employers, and to convert this evidence into careers guidance and information for learners and learning providers.

**Recommendation 8: maintain and update labour market intelligence for languages and intercultural skills, to ensure a robust evidence base for qualification and training development.**

**Recommendation 9: maintain and update labour market intelligence for languages and intercultural skills, to ensure a robust evidence base for careers information and guidance.**

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## 12. Appendices

### Appendix 1: Full list of Standard Occupational Classification (2000)

SOC Code	Major Group	Sub-Major Group
1	Managers and Senior Officials	11 Corporate managers
		12 Managers and proprietors in agriculture and services
2	Professional occupations	21 Science and technology professionals
		22 Health professionals
		23 Teaching and research professionals
		24 Business and public professionals
3	Associate professional and technical occupations	31 Science and technology associate professionals
		32 Health and social welfare associate professionals
		33 Protective service occupations
		34 Culture, media and sports occupations
		35 Business and public service associate professionals
4	Administrative and secretarial occupations	41 Administrative occupations
		42 Secretarial and related occupations
5	Skilled trades occupation	51 Skilled agricultural trades
		52 Skilled metal and electrical trades
		53 Skilled construction and building trades
		54 Textiles, printing and other related skills
6	Personal service occupations	61 Caring personal service occupations
		62 Leisure and other personal service occupations
7	Sales and customer service occupations	71 Sales occupations
		72 Customer service occupations
8	Process, plant and machine operatives	81 Process, plant and machine operatives
		82 Transport and mobile machine drivers and operatives
9	Elementary occupations	91 Elementary trades, plant and storage related occupations
		92 Elementary administration and service occupations

## 12. Appendices

### Appendix 2: Sector Skills Council names, SSC descriptions and SIC definition

SSC name	SSC description	SIC definition
<b>Asset Skills</b>	Property, housing, cleaning services, parking and facilities management	70, 74.7
<b>Cogent</b>	Bioscience, Chemical, nuclear, oil and gas, petroleum and polymer industries Sector Coverage: Bioscience, Chemical, nuclear, oil and gas, petroleum and polymer industries	11, 23-25 (exc. 24.3, 24.64, 24.7, 25.11, 25.12) 50.5
<b>Construction Skills</b>	Construction	45.1, 45.2, 45.32, 45.34, 45.4, 45.5, 74.2
<b>Creative and Cultural Skills</b>	Craft, cultural heritage, design, literature, music, visual and performing arts.	22.1, 22.31, 36.22, 36.3, 74.4, 92.31, 92.32, 92, 34, 92.52
<b>Energy and Utility Skills</b>	Electricity, gas, waste management and water industries	37, 40.1, 40.2, 41, 60.3, 90.01-90.02
<b>E-skills UK</b>	Information technology and telecommunications	22.33, 64.2, 72
<b>Financial Skills Partnership</b>	Financial services, finance and accounting sectors	65-67
<b>GoSkills<sup>97</sup></b>	Passenger transport	60.1, 60.21, 60.22, 60.23, 61.1, 61.2, 63.21, 63.22, 63.23, 80.41
<b>Government Skills</b>	Central government	75.1 75.21 75.22, 75.3
<b>SEMTA</b>	Science, engineering and manufacturing technologies (including Composites)	25.11, 25.12, 27-35, 51.52, 51.57, 73.10
<b>IMI</b>	The retail motor industry	50.1-50.4, 71.1
<b>Improve Ltd</b>	Food and drink manufacturing and processing	15 (exc 15.92 & 15.11/3), 51.38
<b>Lantra</b>	Environmental and land-based industries	1, 2, 5.02, 201, 51.88, 85.2, 92.53
<b>Lifelong Learning UK<sup>98</sup></b>	Community learning and development, further education, higher education, libraries, archives and information services, and work based learning	80.21, 80.22, 80.3, 80.42, 92.51
<b>People 1<sup>st</sup></b>	Hospitality, leisure, passenger transport, travel and tourism	55.1, 55.21, 55.23, 55.3-55.5, 63.3, 92.71, 92.33
<b>Proskills UK</b>	Process and manufacturing sector	10,12-14, 20.4, 20.51, 21.1, 21.2, 22.2, 24.3, 26 (exc. 26.82/2), 36.1
<b>Skills Active</b>	Active Leisure, Learning and Well-Being	55.22, 92.6
<b>Skillsfast –UK<sup>99</sup></b>	Clothing, footwear and textiles industry	15.11/3, 17-19, 24.7, 51.16, 51.24, 51.41, 51.42, 52.71, 93.01
<b>Skillset</b>	Broadcast, film, video, interactive media, photo imaging, publishing and advertising. Fashion and Textiles (from 1 April 2010).	22.11-22.13, 22.15, 22.32, 24.64, 74.81, 92.1, 92.2, 92.4
<b>Skillsmart Retail</b>	Retail	52.1-52.6
<b>Skills for Care &amp; Development</b>	Early years, children and young people's services, and social work and social care for adults and children	85.3
<b>Skills for Health</b>	The health sector across the UK	85.1
<b>Skills for Justice</b>	Community safety; courts, tribunals and prosecution; custodial care; fire and rescue; forensic science; law enforcement; offender management and support; policing; victim, survivor and witness support; youth justice and the children's workforce. Legal services joined the footprint in 2010/11.	75.23, 75.24
<b>Skills for Logistics</b>	Freight logistics industry and Wholesale	51 (exc. 51.16, 51.24, 51.38, 51.41, 51.42, 51.52, 51.57, 51.88), 60.24, 62.1, 62.2, 63.1, 63.4, 64.1
<b>Summit Skills</b>	Building services, engineering	45.31, 45.33, 52.72
<b>Non-SSC employers</b>	All sectors not covered by an SSC at this point in time and are spread across manufacturing and service sectors.	All other SICs

Source: UKCES (2010) National Employer Survey for England 2009, page 330-334

<sup>97</sup> Formally merged with People 1st on 4 July 2011

<sup>98</sup> Lifelong Learning UK ceased to operate as a Sector Skills Council on 31 March 2011.

Responsibility for the majority of the LLUK footprint transferred to LSIS on the 1 April 2011.

<sup>99</sup> Was merged with Skillset on 1 April 2011