

## Foreword

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The need to trade globally, and the trading opportunities opened by communications technologies, have accelerated the process of internationalisation. The employment market, along with virtually every other market, has become global.

Effective communication with our global clients is key. Yet how many of our businesses include international communication when they plan their proposed entry into a new export market?

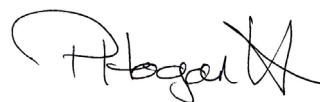
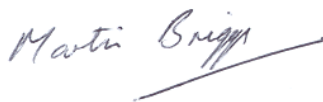
The findings of this survey suggest that only in a small number of cases is the answer a convincing 'yes'. In this respect, the East Midlands is not dissimilar from many other regions where language audits have already been completed.

Language skills have an importance beyond competitiveness in exporting. Language skills are also life skills and in this sense the insights of the report affect us all.

The East Midlands Development Agency and Trade Partners UK in the East Midlands have recognised the need to take a lead at strategic level in raising awareness of the need for language and communication skills and in creating a support infrastructure. We need to help create the conditions in which the majority of our businesses routinely include developing the capability to operate effectively in the local language and culture as part of their international trade process.

This review of the demand and supply of language skills and services in the East Midlands is most welcome. It enables the region to identify and measure the skills gap and review what companies want and expect from education, training and service providers over the coming years to meet our aim of being one of Europe's Top 20 regions by 2010. It also gives a very full picture of what language provision already exists in the region's schools, universities and colleges.

We would like to thank the Languages National Training Organisation for undertaking such a study and providing us with an important benchmark for the region's skills profile in languages. We hope this report will help to raise awareness of the importance of languages for the East Midlands economy and generate support from the many stakeholders in business, education and the public sector for the proposed actions set out here.



# East Midlands Language Skills Capacity Audit 2002

## Executive Summary

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## Executive Summary

The East Midlands Development Agency (EMDA) and Trade Partners UK commissioned a survey investigating the extent to which findings regarding demand and provision for language and culture skills in business across the UK<sup>1</sup> may be applicable to the East Midlands. The recommendations will directly support the objective of addressing the international communications element of the export competitiveness of the region's businesses and the associated employability of its workforce, as described in EMDA's draft action plan for East Midlands International Connections, *Winning Worldwide*.

This is an executive summary of the findings of the survey, which was carried out by the Languages National Training Organisation<sup>2</sup> and EMFEC. For details of ordering the full audit report please refer to [www.rln-eastmidlands.com](http://www.rln-eastmidlands.com).

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<sup>1</sup> According to audits conducted by the Languages NTO in: North East England, North West England, South West England, the West Midlands, Yorkshire and the Humber and Wales.

<sup>2</sup> During the summer 2003 the Languages National Training Organisation and the Centre for Information on Language Teaching and Research (CILT) will merge to form CILT, the National Centre for Languages, as detailed in DfES 2002, *Languages for All: Languages for Life, A Strategy for England*, London, DfES. For Languages NTO throughout, read CILT, the National Centre for Languages, Business Skills and Services.

## I Survey methods

The context for this study is the general finding from previous Languages NTO audits conducted in England and Wales that one in five internationalising businesses is losing money as a result of language skills deficiency; furthermore, only one in ten internationalising businesses has a defined strategy to address international communications issues.

This report for the East Midlands has taken a focused look at the provision for language skills throughout education. It also assesses the region's capacity to provide language services to business and provides case studies showing how businesses meet the challenge of language use at work, setting these findings against those in other regions and across the country.

For this report, quantitative information was drawn from public sources such as the DfES and the Higher Education Statistics Agency (HESA). This was supplemented by data supplied by individual institutions in the region and by the Association of Translation Companies (ATC), the Institute of Linguists (IoL), the Institute of Translation and Interpreting (ITI) and the Open College Networks (OCNs). The National Foreign Languages Strategy for England, *Languages for All: Languages for Life* and the draft action plan for East Midlands International Connections, *Winning Worldwide*, were consulted extensively. Recent Centre for Information on Language Teaching and Research (CILT) and National Institute of Adult Continuing Education (NIACE) survey publications were also consulted, as were the findings of the Nuffield Languages Inquiry and its most recent paper: *A New Landscape for Languages*.

Qualitative information was gathered from questionnaires, telephone interviews, focus group sessions and on-line consultation. A six-page questionnaire was distributed by post/e-mail to the region's further education colleges and adult education centres, as well as to its Specialist Language Colleges. Interviews were also held with two advisers with responsibility for Modern Languages at sub-regional or city level, and four university heads of department for Modern Languages.

Two focus group sessions, for providers of language services and intermediary agencies respectively, were held in order to verify the interim findings, consider survey findings in previous regions especially in terms of demand, and debate issues and the proposed recommendations.

Five companies were interviewed to provide case study examples of best practice in addressing international communications issues in the workplace.

As there has not been a survey carried out in this way before in the East Midlands it is not possible to offer any reliable longitudinal analysis. Some individual institutions provided data from earlier years for comparison.

## 2 Survey findings

### 2.1 Primary schools, GCSE and A level results, Language Colleges, further and adult education

#### Key facts

There is a steady improvement year-on-year for take-up of part-time courses in further and adult education, although full-time courses are generally in decline.

In one city there are thirteen schools with primary language provision, with ten different languages represented.

Numbers of candidates entering for languages at GCSE have remained stable between 1996 and 2001, with a small rise of 5.4%.

Entries at A level have declined by 28% over the same period, French dropping by 38%.

Language Colleges are providing greater diversification of languages taught than in the rest of the state-funded secondary sector.

Provision for languages in East Midlands primary schools varies considerably: in one county there is little formal teaching, although instances of private extra-curricular tuition have been found. In one city, on the other hand, there is relatively widespread availability of language learning in this sector, in addition to an INSET project involving a university which had enabled the training of eighteen primary teachers to teach Spanish by May 2002. Such initiatives are expected to become more commonplace given the support for early language learning in England's National Languages Strategy, *Languages for All: Languages for Life*.

Key Stage 3 achievement in one city unitary authority was shown to be poor in comparison with national results – 18% lower. There is little divergence from the main three languages – French, German and Spanish in that order – in secondary schools, except in Specialist Language Colleges (SLCs). In one county all schools offer at least one language, whilst two-thirds of schools provide the option to study at least two languages. A far wider range of languages is available to Key Stage 4 in the region's thirteen SLCs and there is evidence of a match between business demand and languages offered here – for example, Italian, Russian and Mandarin Chinese. Colleges are working closely with employers and offering alternative, work-related qualifications such as NVQs and the Certificate of Business Language Competence.

While entry levels remain steady, GCSE results have shown a marked improvement between 1996 and 2001, with A\*-C pass rates increasing from 42.5% to 51.1% - above the national average. This is in contrast to the reportedly poor achievements in one county at Key Stage 3.

A level entries and results demonstrate far less stability between 1996 and 2001. French is most dramatically in decline of all languages and was taken by over a quarter fewer students in 2001. Only Spanish has been able to maintain levels reached in 1996. However this pattern is repeated

across England and the East Midlands has at least maintained its share of entries for languages.

Further education colleges surveyed were able to identify several factors influencing their provision for language learning. Two thirds of those responding recruited from abroad, principally to English as a Foreign Language (EFL) courses, which has helped to reinforce their international ethos and encourage awareness of languages amongst students. Spanish is more popular than French in terms of take-up for GCSE courses which parallels findings elsewhere in the UK. Even within this relatively small sample a wide range of languages were identified including several community languages which appear to have been neglected in other education sectors: they include Greek, Gujarati, Japanese, Polish, Portuguese, Panjabi, Russian, Swedish and Urdu. The trend for all languages is increasingly in favour of part-time courses, whereas full-time courses have generally enjoyed less take-up in the current year by comparison with 2001/2002. One adult education centre saw an upsurge in student registrations of 37% in 2001/2002 over the previous year. Five of the region's fourteen FE colleges offer services to business, although indications are that there is little demand for these services and virtually no take-up.

## 2.2 Higher education

### Key facts

Registrations on Institution-Wide Language Programme (IWLP) numbers, usually based in centres rather than departments, are steady or increasing: programmes are maintained at seven out of eight HE institutions in the East Midlands, outnumbering specialist language departments in the region.

The number of higher education (HE) students studying specialist foreign language courses at East Midlands institutions matches the pattern of decline across the UK as whole. Numbers stood at 2,154 in 2002, 11.6% fewer than in 1999.

One HE department is concerned about its immediate future and others have had to cut some languages or substantially reduce the number of modules available.

Specialist degree-level provision is largely for French, German and Spanish: other languages are only available at one or two universities. The more popular degree-level programmes are those that combine a language with professional studies, such as Accounting.

East Midlands higher education institutions (HEIs) offer only a reasonable range of languages to degree level, although there is concern that some 'minor' languages, such as Russian and Italian, could be lost if there is any change in take-up in the coming years – only French, German and Spanish have strength in depth. More unusual offerings including Serbo-Croat, Slovene and the

opportunity to combine Chinese with Marketing.

The general picture for the specialist study of foreign languages is one of steady decline, although individual institutions report instances of increased interest and enrolments on specialist languages degrees, often involving Spanish. There is variety in terms of programme structure. In response to student demand, two HEIs are offering degree level study of three languages; heads of department frequently commented on the need to change programmes in the light of declining interest in the traditional study of literature, in favour of the study of society and the acquisition of work-related skills. This also applies to the combination of languages with non-language disciplines, which has become increasingly popular: these include Law, Film, Management Studies and Psychology. Clearly, there is a message here for future curriculum development if the decline is to be stemmed.

Competition for the ever-shrinking pool of candidates has encouraged some HEIs to innovate: one offers a Diploma in Public Service Interpreting (DPSI). Demand for such a qualification in the region has been noted elsewhere in this report. Another runs a summer school for languages undergraduates at the end of the first year, giving them an opportunity to spend time abroad in addition to their third year.

By comparison, demand for language study on the Institution-Wide Language Programme (non-specialist) is generally on the increase; two HEIs interviewed showed very substantial take-up, accounting for as much as 10% of the entire student population in one case. Fourteen languages are offered at the Language Centres, many of which have been shown to be in demand by business. Four centres offer services to business, ranging from ad hoc training to full videoconferencing and proof-reading support. The consensus suggests that local companies are too cost-conscious and poorly informed about the potential benefits of languages to make significant use of this provision at present.

### **2.3 Commercial language services**

#### **Key facts**

There are 51 registered providers of language services in the East Midlands on the Languages NTO's BLIS Professionals database, representing 4% of the total UK entries.

Providers are typically based in Nottinghamshire, Leicestershire or Derbyshire, offering translation or training services. The majority work on a freelance basis.

There is little provision for community language services and shortages in public service interpreters have been noted.

Numbers of providers found on the BLIS Professionals<sup>3</sup> database are comparable to neighbouring regions such as Yorkshire and the Humber and the West Midlands. Northamptonshire and Lincolnshire fare most poorly for coverage when we also consider membership records from the Institute of Linguists, however most indicate that they are geographically flexible in terms of their provision. Two thirds of the sample work on a freelance basis.

Of concern is an almost complete absence of provision for community languages such as Urdu and Panjabi. There is specialist offering of Arabic, Mandarin Chinese and Turkish but these are languages less widely spoken among the ethnic minority population of the region. This mismatch was discussed in both focus groups conducted during the audit, where concern was expressed that these languages were not better catered for especially in the public sector.

The focus group for providers in the East Midlands was well attended and uncovered several issues relating to commercial provision locally. Doubts were raised as to the ability of the public sector and in particular Specialist Language Colleges to deliver services to business. There were also concerns about competition from Chambers of Commerce in actually providing language services themselves rather than promoting the services of a member provider.

## 2.4 Intermediary agencies

### Key facts

Lack of skills in language and especially culture presents barriers to exporting and importing for businesses in the East Midlands.

Instant access to live, on-line information is vital to businesses in the region.

More TPUK Language for Export awards were made in 2001 than in 1999 and the East Midlands came second overall only to London and the South East.

A focus group for business intermediaries encompassed discussions which gave a valuable insight into the issues facing businesses and providers in the East Midlands. It was agreed that languages rated highly as a barrier to export success in the region and that a higher profile for international communications and better provision of on-line information would improve competitiveness.

Better networking would close the gap in terms of provision and demand for language services: it was felt that many providers are not offering the right packages. An interest was expressed in exploring the potential of China as an export market and in investigating further the call centre industry's use of languages, as well as in harnessing European talent venturing into the region.

Examples of best practice in business, service provision and education are provided biannually through the TPUK Languages for Export awards. The East Midlands has enjoyed considerable

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<sup>3</sup> BLIS Professionals is the Languages NTO's quality-assured, on-line database of language service providers



success in this TPUK initiative over recent years and a local company has achieved national honours in both 1999 and 2001.

## 2.5 Company case studies

### Key facts

Although companies make good use of native speaker resources, there is strong evidence of employment and use of British employees with languages.

Difficulties in recruiting speakers of foreign languages with suitable work experience are noted in several cases.

Awareness of funding opportunities is limited. Where a language training course has been funded, one employer was unable to recruit sufficient numbers due to work schedules.

Five East Midlands export companies were interviewed during the audit, spanning a wide range of industries including fashion and textiles, work apparel, plastics manufacturing and upholstery manufacturing.

Use of French, German and Spanish to enable expansion into new markets is commonplace among the firms surveyed, although increasingly the value of languages such as Chinese, Japanese, Arabic and Korean in opening up new markets is being recognised. In these cases, translation of the company website or brochures, or use of an agent is more usual than employment in-house of native speakers.

All companies demonstrate a strong understanding of cultural differences and a willingness to adapt in order to gain acceptance in a new trading environment. However, comments during the focus groups and evidence presented in our survey of commercial providers show that cultural briefing services are poorly represented in the region.

## 3 Observations

As investment grows from all parts of the world in the East Midlands and local businesses look to exploit new markets ever further afield, the need for a wider range of languages is growing. Yet there is little recognition for the economic and social value of many community languages in the region and there is a clear mismatch between demand from business and formal educational provision.

While there is concern that interest in languages at A level has waned substantially and that overall take-up for specialist study of languages in higher education is in decline, there are on the other hand instances of good practice that can be replicated in all sectors. Primary schools in one city offer the opportunity to learn ten different languages and some of the region's

universities are showing increased numbers year-on-year through innovative development of their programmes. Examples like these show how the current largely negative trend might be reversed.

The DfES languages strategy for England and EMDA's forthcoming Action Plan for East Midlands International Connections pave the way for new alliances between educational providers, commercial providers, businesses and support agencies in the region. CILT, the National Centre for Languages will play a key role in implementing this strategy especially through the establishment of the Regional Language Network East Midlands, which will act as a central hub for information and support on language skills in the workplace.

#### **4 Recommendations for action in the East Midlands**

These recommendations recognise that the achievement of improvements in language capacity in the East Midlands in and for the workforce requires the commitment of a wide range of partners working together to meet common aims. The Regional Language Network East Midlands looks forward to being a catalyst in addressing these recommendations.

##### **Aim**

To enhance companies' competitiveness and individual capability in the global market, recognising that successful international communications are not the only factor in export success, but that they are an indispensable element.

##### **Objective 1: Create the infrastructure for a co-ordinated regional approach**

- to achieve cohesion and synergy between the range of bodies and measures working to improve the effectiveness of East Midlands businesses in international communications

##### **Recommendations**

1. Awareness-raising and information supply: create in the East Midlands a central point of information on language skills and services, with links and sign-posting to/from relevant related services, generating and supporting a virtual language community through on-line services, labour market intelligence, etc.
2. Engage networks of stakeholders: recruit sub-regional partners to form local networks and ensure co-operation and dissemination of information at county level.
3. Add to agendas for action: support catalytic action to link a common message about the value of language skills and services into the strategic planning processes of other key regional and UK stakeholders: East Midlands Development Agency, Trade Partners UK, Business Link, Learning and Skills Councils, Sub-regional Strategic Partnerships, Confederation of British Industry (CBI), Sector Skills Councils (SSCs), Sector Skills Development Agency (SSDA), Chambers of Commerce, Trade Unions, HE/FE, etc.
4. Integrate into established programmes: support the co-ordination for maximum impact of externally-funded solutions to identified business need for languages, e.g. European Social Fund (ESF), Leonardo-funded opportunities, Passport to Export Success.

**Objective 2: Promote networking among users and providers of language skills and services**

- to improve the effective use of language solutions to enhance economic performance

**Recommendations**

1. Underpin and further facilitate networking between users of language skills and services and providers, to support improvements in service effectiveness. Build where appropriate on existing networks, e.g. export clubs, membership of Chambers.
2. Facilitate networking between the different categories of language service providers, to support continuing professional development and quality improvement and encourage the establishment of regional and/or sub-regional foreign language service providers' networks or for a.
3. Provide training workshops for International Trade Advisers and other intermediaries on the international communications requirements for successful exporting.
4. Populate and promote BLIS on-line services, including BLIS Professionals for supply of language service providers and BLIS Jobs to enable East Midlands businesses to find jobseekers with language skills.
5. Target for support companies where there is audit evidence of particular need (i.e. companies with less than 100 employees or where fewer than 30% of sales are exported).

**Objective 3: Implement a range of practical measures**

- To mobilise and extend existing resources to meet the needs of East Midlands companies

**Recommendations**

1. Identify subsidies for translation of literature and website localisation, and/or systems offering instant foreign language translation.
2. Building on existing good practice models, extend the take-up of focused work shadowing and work experience opportunities for school, FE and HE students; collaborate with local universities and commercial agencies in placing suitably experienced overseas students in East Midlands companies to handle appropriate short-term assignments; promote greater development of placements of EM students abroad, including apprentice level.
3. Use Business Language Champions (companies demonstrating best practice) to promote the value of languages for employability in schools, from the primary phase on.

4. Create and disseminate focused careers information to learners and advisers, in co-operation with CILT, the National Centre for Languages, Connexions and other stakeholders
5. Encourage companies to develop language strategies
6. Provide 'how to' guides for companies (e.g. how to locate and use different types of interpreting services), disseminate the TPUK pack *Improving your Business Communications* and ensure improved take-up for the *Export Communications Review (ECR)*
7. Encourage/fund development of provision in languages where gaps exist

**Objective 4: Support strategic planning and funding measures for future skills provision**

- to support the education sector and other providers in making available for the future the language skills and services that East Midlands companies will need

**Recommendations**

1. Work with HE to encourage, develop, expand and disseminate broad provision in IWLP programmes.
2. Encourage HE to undertake curriculum development in combinations of languages with professional subjects.
3. Encourage greater diversification of provision across the education sector, building on work in Specialist Language Colleges.
4. Work in co-operation with CILT, the National Centre for Languages and other organisations to deliver England's National Languages strategy, *Languages for All: Languages for Life*.
5. Work with EMDA to deliver its Action Plan for East Midlands International Connections, *Winning Worldwide*.
6. Support provision in languages where deficiencies are more apparent: increased provision of German, Russian, Italian, Chinese and support for community languages.
7. Encourage through appropriate funding mechanisms linkages in FE/HE between languages and other disciplines, e.g. accountancy, IT, marketing, etc.
8. Establish new programmes of study in 'missing' languages.

9. Work with national business support agencies and stakeholders to tailor business support packages to respond to known deficiencies on the demand side.

**Objective 5: Disseminate a clear and consistent message in the East Midlands on the value of languages**

- To raise awareness generally among all stakeholders

**Recommendations**

1. Review existing promotional materials and systems available nation-wide and their potential for adaptation to the East Midlands market.
2. Produce material containing evidence from other regional surveys – one in five internationalising companies losing business because of language barriers, two in five facing cultural barriers – supported by evidence from this report.
3. Mobilise regional media to publish success stories of regional and national importance (e.g. winners of TPUK Languages for Export Awards, language achievement in the workplace, best practice in schools).
4. Create and disseminate good practice case study material demonstrating the economic benefit of effective language skills and service use in local businesses.