

LANGUAGES FOR THE FUTURE

Which languages the UK needs most and why

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Alcantara Communications provides expertise to national and international organisations, private companies and third sector bodies on language education policies, multilingualism and languages in employment and undertakes research and analysis in this field.

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ABOUT THE BRITISH COUNCIL

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FOREWORD

On a poster on the wall in a university in Beijing, I recently read these remarkable words from Nelson Mandela: 'If you talk to a man in a language he understands, that goes to his head. If you talk to him in his own language, that goes to his heart.' Nearly 1,000 people were taking their English exams that day.

I am proud to work for an organisation which offers millions of learners worldwide access to the education, job opportunities and social mobility that English brings. But in the UK we must accept that speaking English alone is not enough in a world where multilingualism is becoming the norm.

There can be no doubt that the UK needs more of its people to speak foreign languages – for employability, for trade and the economy, and for our cultural life. But, let's be honest, there are big barriers to this. So many people worldwide do speak English, and learning foreign languages in the UK has often been seen as an academic pursuit rather than a vital skill. Much of this revolves around the difference between being 'fluent' or 'functional' in a language.

The British Council's experience of English language teaching is that what matters most is being able to understand and to be understood; whether the need is for basic vocabulary to give directions to a taxi driver or for a more extensive vocabulary to be an international business person.

It is hard to know, especially at a young age, which language is likely to be of most use. So perhaps a more 'functional' focus – having enough – might be the key to promoting language learning in the UK. Not to impoverish or lessen the academic or cultural value of long-term language study, but to increase the number of people who feel able – not

unable – to travel, explore, navigate and engage at some level with people in other languages.

The analysis of economic and cultural indicators in this report suggests not that people in the UK are learning the wrong languages, but that we need far more people learning a much wider range of languages in the future. French, Spanish and German will continue to be important but we will also need significantly more Arabic, Mandarin Chinese and Portuguese speakers as well as speakers of Italian, Japanese, Russian and Turkish.

It is worth remembering that when we think of languages in the UK, we tend to think of 'going away'. However, given that Japanese car manufacturers, Chinese infrastructure developers and French utility companies all make huge contributions in the UK, you do not need to cross the equator or even the English Channel to find situations and jobs where even a little Chinese, Japanese, or French can be a real career enhancer.

Five or ten phrases will enable most people to navigate many countries at a basic level. 1,000 words can be enough to feel autonomous, confident and secure in another country and brings some cultural understanding. 'Fluent' is an inhibitor, 'functional' is a liberator. It begins with a few words and phrases – and that small investment can grow into a lifetime of interest, employment and opportunity.



A handwritten signature in black ink, appearing to read 'John Worne'.

John Worne
Director of Strategy,
British Council

John Worne is responsible for the British Council's global strategy, governance, web and digital presence and reputation. He writes and speaks on the value of culture and the importance of languages and international skills for the UK's young people. He is a regular media commentator on soft power and the UK's standing in the world. A French speaker, John has lived and worked in Paris as well as Hong Kong, Colombia, Russia, Indonesia and Malaysia. He has also held senior positions at the Cabinet Office and the Department of Health.

EXECUTIVE SUMMARY

It is a widely held – if not undisputed – view that the UK is lacking in the necessary language skills for the future, partly because of the status of English as the language of international communications.

This report seeks to provide a strategic analysis of the UK's long-term language needs, looking at a variety of economic, geopolitical, cultural and educational indicators and scoring different languages against these. It identifies a list of ten languages which will be of crucial importance for the UK's prosperity, security and influence in the world in the years ahead.

The indicators used are:

1. current UK export trade
2. the language needs of UK business
3. UK government trade priorities
4. emerging high growth markets
5. diplomatic and security priorities
6. the public's language interests
7. outward visitor destinations
8. UK government's International Education Strategy priorities
9. levels of English proficiency in other countries
10. the prevalence of different languages on the internet.

From the analysis of languages against these indicators – and it is worth remembering that they include cultural and educational priorities as well as economic ones – comes a list of the ten most important languages for the UK's future; in order:

1	Spanish
2	Arabic
3	French
4	Mandarin Chinese
5	German
6	Portuguese
7	Italian
8=	Russian
8=	Turkish
10	Japanese

A survey commissioned by the British Council for this report suggests that three quarters of the UK public are unable to speak any of these languages well enough to hold a conversation.

These findings suggest not that people in the UK are learning the *wrong* languages, but the UK needs to develop its citizens' competence in a wider range of languages, and in far greater numbers, in order to reap the economic and cultural benefits available to those who have these skills.

The conclusion of this analysis is that the UK must take a strategic approach in planning for effective development of the language capacity which this country needs. This has implications for:

- The four UK governments, in terms of linking language education policy to national aspirations for international engagement in business, education and cultural fields.
- Governments and business, in that they must work together to develop educational policy and priorities relating to languages.

- Businesses, in that they should invest in the development of the language skills from which they will directly benefit.
- Policy makers, businesses, diaspora communities and minority communities; in terms of ensuring these groups' language skills and cultural skills are utilised in the education system and for business purposes.
- School curricula in all four countries, in that they should be enriched by the inclusion of new languages and an increased focus on understanding other cultures.
- Schools, in exploiting the many languages and cultural resources available; whether funded, free, local, online or through international links and partnerships with other countries.
- Young people – and their parents – in that they should seek out more opportunities to learn languages and experience other cultures, both in school and outside – and receive more consistent advice about the benefits of doing so.
- The UK's international partnerships with language and cultural institutes of other countries which enable access to resources, support and learning from good practice in the teaching and learning of languages.
- UK adults who currently do not speak any of the key languages should endeavour to learn the basics of one of them.

INTRODUCTION

Languages are the bedrock of the world's cultural heritage. Every language offers a rich and unique insight into different ways of thinking and living as well as into the history of the myriad of cultures and peoples across the globe.

David Crystal has written passionately about the need to appreciate and understand the world's linguistic heritage in the same way that we value its biological diversity.¹ All languages are equal from a linguistic point of view. It is as wrong to judge the value of one against another as it would be to compare the relative value of, say, the culture of Renaissance Italy with that of Imperial China. But when it comes to investing time, money and effort in the learning of languages, practical factors inevitably come into play. Politicians, taxpayers, parents and learners all want to be able to invest in those languages where their efforts and resources are going to prove most effective for their particular needs.

There is no denying the importance of English as a common means of communication across the world, or its strength as the first foreign language of choice for most non-Anglophone countries.² But David Graddol's 2006 analysis of global language trends was a timely warning against complacency regarding the predominance of English worldwide.³ He predicted that the competitive advantage of English will ebb and that monolingual English

speakers, unable to tap into the multilingual environments enjoyed by others, would face a bleak economic future.

Studies for the European Commission have shown that the economic benefits of competence in more than one language are not limited to English.⁴ A wide range of languages are needed to exploit the benefits of the single market and keep improving trade between peoples worldwide. Even when others have a high level of proficiency in English, this does not mean that their languages can be ignored. In order to develop relations between countries and individuals based on mutual respect and trust as well as to do business effectively, there is a need for an understanding of the social, political, and technical systems of a country, as well as the innumerable aspects of daily life that are important to that nation's identity and culture.

Of course people learn languages for more than purely instrumental purposes, but learners do want to be able to use the languages they have learned, and taxpayers and governments want to see their education resources spent in a way that will provide the greatest possible

long-term benefits. It is important, therefore, to attempt to address the difficult question of which languages are likely to provide the best outcomes, and to identify criteria by which we may be able to judge the potential value of one over another in terms of the UK's future economic prosperity and security.

Public debate about which languages are important to learn is often dominated by the particular interests of the individual commentator and too often lacks a solid and balanced information base. In shaping policy and priorities it is also important to balance economic with non-market interests – cultural, intellectual, individual and societal factors. Current needs and the demands of the present must also be considered alongside changing global patterns of economic and cultural exchange, and what this might mean for languages needed in the future. The UK's position in the world depends not only on its membership of organisations like the Commonwealth and the European Union (EU), but also on considering where trust between other countries and the UK could be enhanced by a greater understanding of their languages and cultures.

1. David Crystal (2000) *Language Death*, Cambridge University Press.

2. Janet Enever, Jayne Moon and Uma Raman (2009) *Young Learner English Language Policy and Implementation: International Perspectives*, British Council and Garnet Education.

3. David Graddol (2006) *English Next*, British Council.

4. <http://ec.europa.eu/languages/languages-mean-business/evidence-from-research>

This publication focuses on the UK's long-term strategic needs for languages and asks which of them are most likely to meet the UK's needs and aspirations over the next 20 or so years.

It uses a number of criteria, based on both economic and non-economic factors, to help identify language requirements for global engagement, using evidence from a range of sources. It does not seek to provide the definitive answer – recognising that politics and priorities are very likely to change over time – but rather to provide material for an informed discussion of the issues.

Neither does it set out to provide an in-depth consideration of the use of particular languages in different contexts and environments, but to provide a strategic analysis to feed into public debate.

It cannot be stressed strongly enough that *all* languages are valuable and this report does not seek to advise *against* learning a language which might suit an individual's interests and particular needs. The knowledge of any language in addition to one's mother tongue not only expands linguistic capability, but can also give access to employment,

enrich cultural understanding and provide a valuable resource which can be drawn on in overcoming communication barriers in an international context. All and any languages are worth having – this report simply indicates those the UK needs most.

Poster on a wall of Beijing Language and Cultural University

If you talk to a man in a language he understands, that goes to his head.
If you talk to him in his own language, that goes to his heart.

如果用一个人听得懂的语言和他交谈，触动的是他的思维；如果用一个人的母语和他交谈，触动的则是他的心灵。

南非作者 Nelson Mandela 纳尔逊·曼德拉

THE UK'S LANGUAGE CHALLENGE

THE CURRENT LANGUAGE DEFICIT

In many ways the UK is linguistically rich. It has major indigenous languages: Welsh, Gaelic, Irish, Scots, Ulster Scots, Manx and Cornish; and in total somewhere between 200 and 300 languages are represented amongst its diverse population.⁵ The 2011 UK Census identified Polish as the most widely spoken 'main language' after the UK's own indigenous languages (but the formulation of the census question meant that many other languages spoken by more established immigrant groups were under-represented). Pupil censuses carried out by the Department for Education (DfE),⁶ the Scottish Executive,⁷ education authorities in Wales⁸ and research conducted by the Northern Ireland Department of Education⁹ show that the top ten languages spoken by schoolchildren in the UK consist of four from the Indian subcontinent (Punjabi, Urdu, Gujarati and Bengali), three from Europe (Polish, French and Portuguese), and Arabic, Tamil and Somali. The linguistic skills of these children should be taken into account in any consideration of how language skills can be developed to enhance future cultural and economic contacts between the UK and countries where these languages are spoken.

Despite this apparent richness, the need for the UK to improve its capability in languages is incontestable, as shown by the following factors:

- The achievement of pupils in England in the *European Survey on Language Competences* was poorer than that of pupils from any other country taking part.¹⁰ In fact, 30 per cent of 15 year olds about to take their GCSE exams did not achieve any measurable level at all in the language they were studying.
- The number of students taking A-levels in languages has been falling for a number of years – in 2013 alone by five per cent. Languages now make up only 3.8 per cent of all subject entries, meaning that fewer than one in every 26 students learns a language beyond a basic level. French and German entries fell by ten per cent and 11 per cent respectively, following on from five per cent and seven per cent declines in 2012.¹¹ In Scotland there is concern about the continuing decline in French and German in both Standard Grade and Higher examinations.¹²
- There is concern about the low numbers of students taking language degree courses.¹³ As a front page article in the *Observer* recently noted, the 4,700 students who have been accepted in 2013 to start language degrees is dwarfed by almost ten times that number taking business studies.¹⁴
- British employers regularly express dissatisfaction with school and college leavers' skills in languages. In a 2013 survey of businesses by the Confederation of British Industry only 36 per cent were satisfied with their employees' language skills, compared with 93 per cent who were satisfied or very satisfied with school and college leavers' skills in the use of IT.¹⁵ Seven out of ten businesses stated that they value language skills in their employees.
- In their 2012 publication *Exporting is good for Britain*, the British Chambers of Commerce¹⁶ argued that an inability to trade in languages other than English is damaging the UK's export performance. Their report stated that 'the extent of the language deficit in the UK is truly serious: up to 96 per cent of respondents had no foreign language ability for the markets they served, and the largest language deficits are for the fastest-developing markets.'¹⁷
- The British Academy has made a powerful case for languages not

5. John Eversley et al. (2010) *Language Capital. Mapping the Languages of London's Schoolchildren*, CILT/Institute of Education.

6. National Association for Language Development in the Curriculum (2011) *School Census January 2011 Language Data. Number of Compulsory School Age Pupils in Primary, Secondary and Special Schools by Declared First Language*: www.naldic.org.uk/research-and-information/eal-statistics/lang

7. National Statistics (2011) *Pupils in Scotland 2011*. Main Home Language.

8. Welsh Assembly Government (2010) *School Census*: <http://wales.gov.uk/topics/statistics/headlines/schools2011/110906/?lang=en>

9. Department of Education Northern Ireland (2013) *Newcomer Pupils*: www.deni.gov.uk/index/support-and-development-2/additional-educational-support/newcomer-policy.htm

10. European Commission (2012) *First European Survey on Language Competences. Final Report*: <http://ec.europa.eu/languages/eslc/index.html>

11. Joint Council for Qualifications (2013) *A, AS and AEA Results, Summer 2013*.

12. Scottish Qualifications Authority (2013) *National Course and Awards Result Statistics 2013*.

13. See latest statement from the Higher Education Funding Council for England at www.hefce.ac.uk/whatwedo/crosscutting/sivs/data

14. The figures on which this article is based are published at www.ucas.com/sites/default/files/daily-clearing-analysis-subject-130816.pdf

15. Confederation of British Industry and Pearson (2013) *Changing the Pace. CBI/Pearson Education and Skills Survey 2013*.

16. British Chambers of Commerce (2012) *Exporting Is Good for Britain – Skills*: www.britishchambers.org.uk/policy-maker/policy-reports-and-publications/exporting-is-good-for-britain-skills.html#UMDH-9vKdAM

17. *ibid.*

18. British Academy (2011) *Language Matters More and More. A Position Statement*.

19. Ethnologue: www.ethnologue.com/statistics/size

only in relation to trade and global economy, but also for greater intercultural understanding, as well as highlighting their value as both the object and vehicle of study and research.¹⁸ It states that *'Understanding the languages, cultures and societies of others, as well as the way in which languages interact with each other and with English, is an important means of improving intercultural interactions and enhancing social well-being at home as well as overseas.'*

- A recent survey conducted by YouGov for the British Council highlights that 75 per cent of the adult UK population is unable to hold a conversation in any of the ten languages highlighted as important in this report.

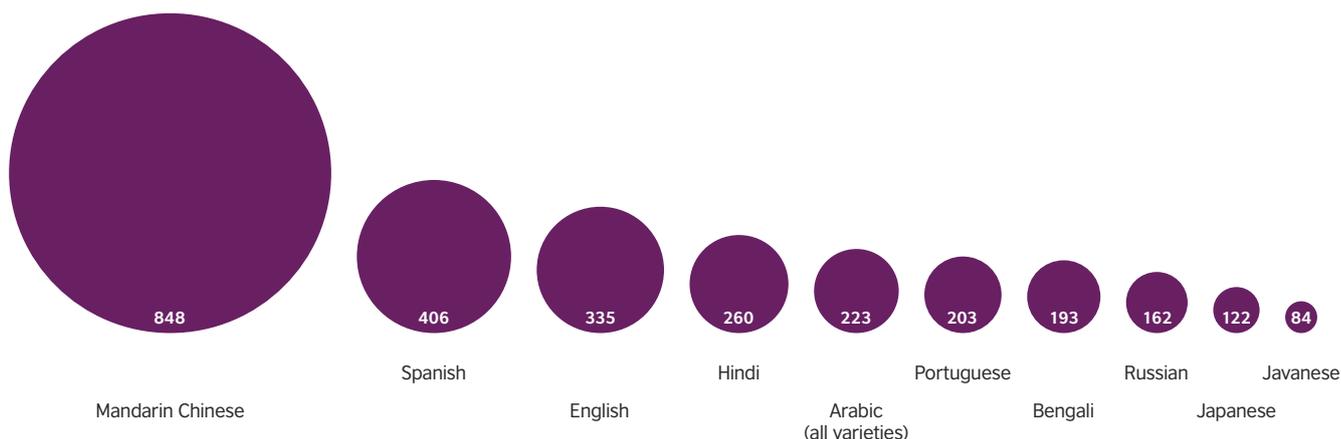
MAKING SENSE OF THE UK'S LANGUAGE NEEDS

But which languages does the UK most need? Unlike their peers in many countries of the world, people in English-speaking nations do not have one obvious language which everyone should learn. Traditionally our schools and universities have taught French and German, but these are the languages that have suffered most from recent declines. The number of people studying Spanish has increased steadily – to the extent that it has now overtaken German as the UK's second most popular language to learn. But is this what the UK needs, given the strength of the German economy, its status as the UK's number one trading partner and known employer demand for German in the UK? Indeed, should the UK be looking at European languages

at all, or instead be putting its energies into developing competence in major global languages such as Mandarin Chinese and Arabic? And what about Russian and Japanese, heralded some years ago as upcoming languages, but stubbornly resistant to significant growth within our education systems?

In terms of numbers of first language speakers, Mandarin Chinese is easily the most predominant language in the world today, and collectively, all Chinese languages total 1,197 million native speakers.¹⁹ Many of the languages in Chart 1 below also have very large numbers of second language speakers. It would be easy to conclude that we should align our language learning efforts accordingly, but does this reflect the true balance of the UK's future needs?

Chart 1: Top ten most widely spoken languages, by first language speakers (millions)



Source: Ethnologue: www.ethnologue.com/statistics/size

English is of course widely used as a lingua franca as well as in international organisations such as the International Monetary Fund (IMF) and the World Bank, where it is the only official language. But a number of other languages also appear frequently as co-official languages in international organisations. The United Nations (UN), for example, has as its official languages Arabic, Chinese, English, French, Russian and Spanish while the International Labour Organisation (ILO) uses English, French and Spanish.

French is an official language alongside English at the Organisation for Economic Co-operation and Development (OECD), the International Olympic Committee and the Council of Europe, while Spanish and Portuguese are co-official in pan-American institutions, as are Portuguese and French in African international organisations. In the EU, the national languages of all member states are official, with English, French and German considered 'procedural languages'.

Table 1 shows a ranking of the top 15 economies based on GDP in 2010 and 2020 by Euromonitor. The growing importance of emerging economies will have implications for global influence, consumption, investment and the environment. Their developing consumer markets present enormous opportunities for businesses (although it is worth noting that income per capita will remain higher in the established economies).

Table 1: Ranking of economies with the largest GDP in 2010 versus 2020 (PPP I\$)

RANK	2010	2020
1	United States	China
2	China	United States
3	Japan	India
4	India	Japan
5	Germany	Russia
6	Russia	Germany
7	United Kingdom	Brazil
8	France	United Kingdom
9	Brazil	France
10	Italy	Mexico
11	Mexico	South Korea
12	South Korea	Indonesia
13	Spain	Italy
14	Canada	Canada
15	Indonesia	Spain

Source: Euromonitor International 2010 (<http://blog.euromonitor.com/2010/07/special-report-top-10-largest-economies-in-2020.html>)

Purchasing power parity (PPP) is a method of measuring the relative purchasing power of different countries' currencies over the same types of goods and services, thus allowing a more accurate comparison of living standards.



IDENTIFYING THE LANGUAGES THE UK NEEDS

METHODOLOGY

Investment in language learning, whether by central government, educational institutions or private sector organisations, requires a systematic analysis of which languages can bring most benefits, whether to people, society at large or our economy. This publication seeks to take forward this analysis by identifying a number of criteria which can be used to aid the prioritisation of languages and has taken into account both market and non-market factors. Economic indicators have been balanced with cultural indicators, public interest in learning different languages, and the need to develop strong relationships for diplomatic, educational or strategic purposes.

Economic and cultural factors have been weighted equally and then qualified with two additional contextual factors: the extent to which people in the countries concerned are proficient in English and the representation of different languages on the internet.

Table 2: The ten factors

1	Current UK export trade
2	The language needs of UK business
3	Government's future trade priorities
4	Emerging high growth markets
5	Diplomatic and security priorities
6	The public's language interests
7	Outward and inward tourism
8	Government's international education strategy priorities
9	Levels of English proficiency in other countries
10	The prevalence of different languages on the internet

	Economic factors
	Cultural, educational and diplomatic factors
	Balancing factors

The ten indicators chosen take into account future requirements as well as current practice. Evidence has been gathered from international organisations, from UK government sources, from business organisations and from independent research. The criteria have been selected to capture 'bottom up' indications from business organisations and the general public, as well as the way in which languages can support 'top down' government policy. The research does not make value judgements about the relative worth of different cultures.

The methodology is open to refinement with the addition of new indicators or alternative weighting, should this be thought beneficial. For example, the extent to which languages or their scripts are related could be factored in – the ability to read the Arabic alphabet gives access not only to Arabic, but to Urdu, Farsi and other languages; and vice versa. Similarly one might wish to include the extent to which different languages are easy to learn for English speakers.

Consistent with the macro focus of the research, the data used relates, in general, to the whole of the UK; data taken from sources of evidence relating to the individual nations of the UK might give slightly different results for England, Scotland, Northern Ireland or Wales respectively. As has been noted above, the aim is not to provide a definitive answer, but to open up a discussion about which languages are most important.

ECONOMIC FACTORS

Current UK export trade (Indicator 1)

The main source for current demand is the Office of National Statistics (ONS) data on the UK's top export markets in 2012. These are set out in Chart 2. A simple matching exercise makes it possible to identify the languages most associated with these countries.

For the purpose of this exercise, regional or lesser-used languages have been omitted. More detailed patterns of language use in business in different countries have not been taken into

account, since this would necessitate a much more complex piece of research. However, the likely extent to which business can be done in English has been factored in – see Table 8 on page 15.

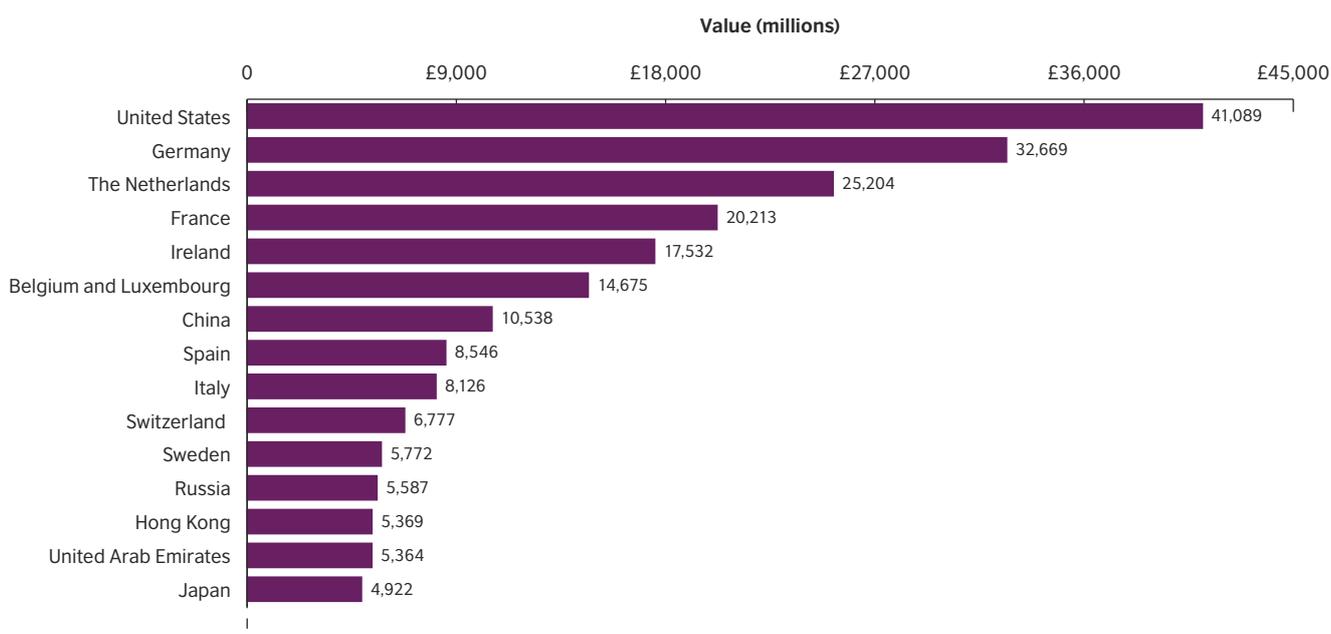
It is recognised, however, that there is no straightforward relationship between one nation and one language, and that global mobility and the internet are creating ever more complex multilingual societies.

The top ten languages associated with the UK's current largest export markets are shown in Table 3.

Table 3: Top ten languages of the UK's current most important export markets (excluding English)

RANK	LANGUAGE
1	German
2	Dutch
3	French
4	Mandarin and other Chinese languages
5	Spanish
6	Italian
7	Swedish
8	Russian
9	Arabic
10	Japanese

Chart 2: UK's top export markets in 2012



Source: Office for National Statistics (2013) *Publications Tables UK Trade February 2013*: www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcm:77-279148

Note: This chart shows goods export figures from 2012. Equivalent figures for services in 2012 were not available at the time of publication. An analysis of 2011 services export figures suggests that including services would not alter our list of top ten languages (shown on page 17 in this report).

The language needs of UK business (Indicator 2)

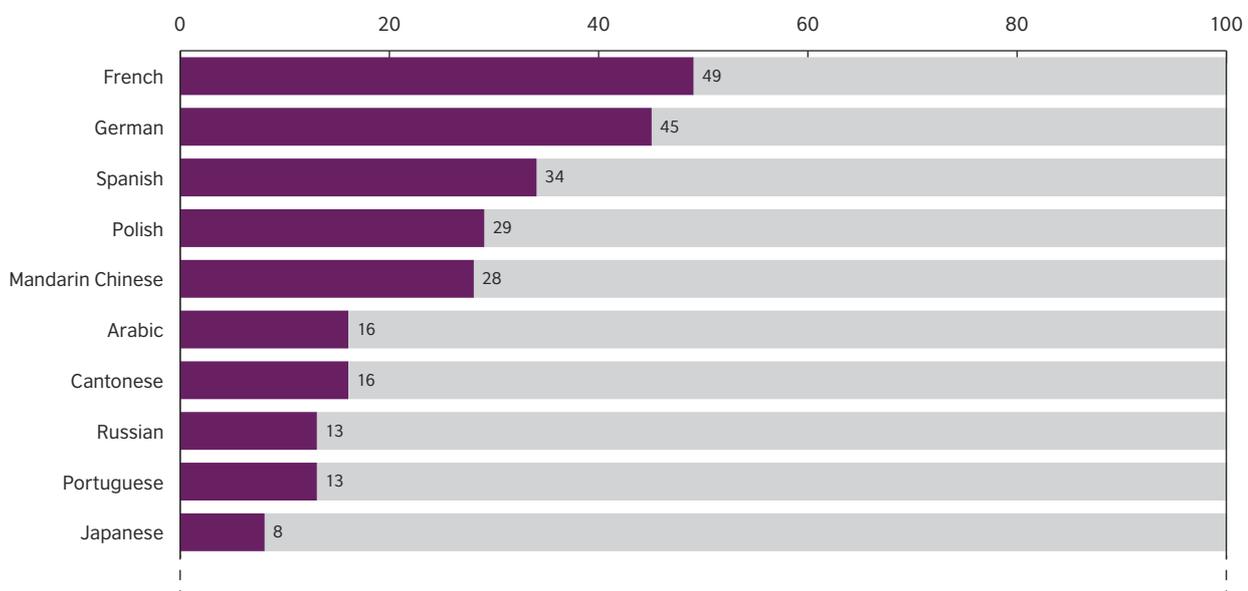
The second source of evidence used in relation to the current language needs of business is the Confederation of British Industry's *2013 Education and Skills Survey*.²⁰ It reports that 70 per cent of responding businesses value language skills among their employees, particularly in helping to build relationships with clients, customers and suppliers. From this report the top ten languages most in demand are shown in Chart 3.

UK government future trade priorities (Indicator 3)

In its strategy for future international business engagement, *Trade and Investment for Growth*,²¹ the UK government stresses the continuing importance of trade with existing partners including the EU, mentioning in particular Germany, France and Benelux, as well as the Nordic and Baltic countries. But it also mentions India, Brazil, South Korea, Mexico, the Gulf States, South Africa, Turkey and Indonesia.

In part this adds further weight to German, French, Dutch, Swedish, Spanish and Arabic which have already been mentioned above, but it also introduces some new languages into the mix: Portuguese, Korean, Turkish and Indonesian as well as the languages of India and South Africa. All these languages have been treated equally and not put into any rank order.

Chart 3: Percentage of companies rating this language as useful to their organisation



Source: Confederation of British Industry and Pearson (2013) *Changing the Pace*. CBI/Pearson Education and Skills Survey 2013.



Emerging high growth markets (Indicator 4)

Evidence was used from the joint CBI/Ernst & Young publication *Winning Overseas*,²² which is explicit about the need for better language skills in order to improve the UK's export potential. It calls for a more strategic approach in order to target high-growth markets in less developed countries, citing not only the so-called BRIC(S) countries but also the 'Next 11' identified by Goldman Sachs and the '25 high growth markets' set out by Ernst & Young. Combining the 'Next 11' and '25 high growth markets' produces the list of countries and associated languages shown in Table 4.

This listing introduces a number of languages not yet mentioned, as well as giving further weight to some of those already identified. Spanish and Arabic score particularly highly on this indicator.

Making predictions for future economic importance can be precarious, and political events may intervene to change expectations, as can be seen in Egypt, in the time since this analysis was undertaken by the CBI and its partners. For this reason a range of sources has been used for this research to balance the score.

An explanation of individual scores and how points were awarded is provided in the Appendix.

Table 4: High growth markets and their languages

COUNTRY	LANGUAGE
Argentina	Spanish
Bangladesh	Bengali
Brazil	Portuguese
Chile	Spanish
China	Mandarin and other Chinese languages
Colombia	Spanish
Czech Republic	Czech
Egypt	Arabic
Ghana	English, plus Akan and others
India	English, Hindi, Gujarati, Panjabi, Urdu, Bengali and others
Indonesia	Indonesian, Javanese and others
Iran	Farsi
Kazakhstan	Kazakh
Malaysia	Malaysian
Mexico	Spanish
Nigeria	English, plus Hausa, Igbo, Yoruba and others
Pakistan	Urdu
Philippines	Tagalog
Poland	Polish
Russia	Russian
Saudi Arabia	Arabic
South Africa	English, Afrikaans, Xhosa, Zulu and others
South Korea	Korean
Taiwan	Mandarin Chinese
Thailand	Thai
Turkey	Turkish
United Arab Emirates	Arabic
Ukraine	Ukrainian
Vietnam	Vietnamese

20. Confederation of British Industry and Pearson (2013) *Changing the Pace. CBI/Pearson Education and Skills Survey 2013*.

21. Department for Business, Innovation and Skills (2011) *Trade and Investment for Growth*.

22. Confederation of British Industry/Ernst & Young (2011) *Winning Overseas: Boosting Business Export Performance*.

Interim analysis of languages needed for economic reasons

Combining the evidence from the four economic indicators used, the languages already most widely taught in the UK education system (German, Spanish and French) emerge as the most important languages for UK trade. These are followed by Arabic, Mandarin Chinese, Dutch and Portuguese, then Russian and Swedish, with Polish in tenth place.

Table 5: Languages needed for economic purposes

LANGUAGE	SCORE
German	24
French	23
Spanish	23
Arabic	15
Mandarin Chinese	15
Dutch	14
Portuguese	10
Russian	9
Swedish	9
Polish	8

Details of the scores, evidence and rationale behind each indicator are provided in the Appendix.

CULTURAL, EDUCATIONAL AND DIPLOMATIC FACTORS

Diplomatic and security priorities (Indicator 5)

For this indicator researchers drew on a recent inquiry carried out by the British Academy to establish how languages are used by the UK government in meeting public policy objectives in the areas of diplomacy and security.²³ The inquiry took evidence from organisations including the Foreign

and Commonwealth Office (FCO), the Serious and Organised Crime Agency and the Government Communication Headquarters (GCHQ), among others. The report reflected the growing importance now being given to language competence within the FCO's Diplomatic Excellence initiative, with specialist knowledge of foreign states, languages, and peoples now explicitly acknowledged to be an important element of the British diplomat's skill set. It also made the case that the national security agenda now encompasses conflict prevention and peace-building, activities in which language assumes an important role. At the same time new linguistic skills are required to counter the growth of cybercrime, organised crime enabled by the ease of global communications, and terrorism. Although the British Academy's report did not seek to identify priority languages, our review of its findings shows **Arabic** and **Mandarin Chinese** as the most frequently cited. These are followed by **Spanish, Portuguese** and **Farsi** (Persian) as well as **Korean, Pashto** and **Turkish**. A wide range of other languages, including French, German, Polish, Urdu and Vietnamese are cited as important.

The public's language interests (Indicator 6)

This indicator seeks to represent grassroots public demand for language learning in the UK, with the caveat that demand is often conditioned by the availability of courses, rather than vice versa.

Looking at A-level entries,²⁴ it is evident that Spanish, Polish, Russian, Arabic, Turkish, Portuguese and Mandarin Chinese are all increasing, but this may reflect populations of speakers of these languages resident in the UK, rather than wider public demand.

A Eurobarometer survey carried out in 2012,²⁵ which interviewed 1,000 adults across the UK, found that French, followed by Spanish, German, Chinese, Italian and Russian, were regarded as the most useful languages to learn. However, this survey only provided respondents with a choice of six languages and is perhaps more indicative of past practice than future intent.

The decision was taken to use the availability of beginner courses for adults as an indicator of public interest in learning particular languages, since such courses can be provided on a more flexible basis than languages in schools or universities, and reflect grassroots public interest, rather than past practice. Research into part-time evening courses²⁶ – selecting those which do not lead to qualifications, since formal qualifications are not available for all languages – shows that Spanish is the most popular language by this measure and the top ten languages are shown in the table below.

Table 6: Languages offered as evening classes

LANGUAGES MOST FREQUENTLY OFFERED AS PART-TIME EVENING CLASSES ACROSS THE UK (WITHOUT QUALIFICATIONS)	NUMBER OF PAGES OF WEB LISTINGS
Spanish	9
French	7
Italian	7
German	4
Japanese	3
Mandarin Chinese	2
Arabic	2
Polish	2
Portuguese	2
Russian	2

Source: www.hotcourses.com

23. British Academy (forthcoming) *Lost for words. The Need for Languages in UK Diplomacy and Security*. We are grateful to the British Academy for allowing us access to a pre-publication copy of this report.

24. Joint Council for Qualifications (2013) *A, AS and AEA Results, Summer 2013*.

25. European Commission (2012) *Europeans and Their Languages. Special Eurobarometer 386*.

26. www.hotcourses.com

27. Populus/British Council (2013) (available on request from the British Council).

28. House of Commons library (2013) *Tourism. Standard Note SN/EP/6022*.

29. HM Government (2013) *International Education: Global Growth and Prosperity*.

Outward visitor destinations (Indicator 7)

Overseas visitor figures provide a good indication of interchange between different countries and peoples, the sort of contact that people in the UK typically experience with speakers of other languages.

Research by Populus commissioned by the British Council²⁷ showed that 22 per cent of British adults say they have paid more for goods or services as a result of not being able to speak the local language when overseas, 18 per cent report that they have stayed primarily in resorts – avoiding the local culture – when on holiday and eight per cent admit they have caused offence on holiday as a result of a lack of understanding of the local culture.

The most visited non-English-speaking countries by people from the UK in 2012 were (in descending order) Spain, France, Germany, Portugal, Greece, Poland and Turkey.²⁸ Points have therefore been given to **Spanish, French, German, Portuguese, Greek, Polish** and **Turkish** in descending order.

Languages are also useful for providing information and a warmer welcome to visitors to the UK. According to Visit Britain, the largest inbound tourist markets were France, Germany, The Netherlands, Spain, Italy, Poland and Belgium.

An explanation of individual scores and how points were awarded is provided in the Appendix.

UK government international Education Strategy priorities (Indicator 8)

In July 2013 the UK government published its International Education Strategy,²⁹ setting out the opportunities it sees as a result of demographic changes in rapidly emerging economies. This involves both attracting international students to the UK and supporting transnational education. Although the teaching and learning of English is an important element of this strategy, the government wants to demonstrate that the UK seeks to build relationships based on mutual respect and a two-way exchange of ideas and people.

The International Education Strategy identifies eight priority countries and one region as the primary focus of international education partnerships. These are China, India, Brazil, Saudi Arabia, Colombia, Turkey, Mexico, Indonesia and the Gulf. The languages involved are **Chinese languages, Indian languages, Portuguese, Arabic, Spanish, Turkish** and **Indonesian**. The education sectors in these countries are more likely to want to engage with those who can meet them halfway and demonstrate mutual respect and understanding by working in the language of the host country.

Four points were allocated each time a country was mentioned in the report and this favoured Arabic and Spanish, which are used in more than one of the countries mentioned.

Interim analysis of languages needed for cultural, educational and diplomatic reasons

By combining evidence from the four indicators used in this section, the following interim ranking of languages most needed for cultural, educational and diplomatic reasons emerges:

Table 7: Languages for cultural, educational and diplomatic purposes

LANGUAGE	SCORE
Spanish	35
Arabic	20.5
Portuguese	20
French	18
Mandarin Chinese	16.5
Italian	16.5
German	14.5
Turkish	11
Polish	7.5
Farsi	7

Comparing this ranking with the top languages required for economic purposes, it is interesting to note that Italian, Turkish and Farsi have come into the list at the expense of Russian, Dutch and Swedish.

Details of the scores, evidence and rationale behind each indicator are provided in the Appendix.



BALANCING FACTORS

The findings on economic and cultural/diplomatic needs have been qualified with two further indicators: the degree to which populations in different countries are able to speak English, and the extent of use of different languages on the internet.

Levels of English proficiency in other countries (Indicator 9)

The English Proficiency Index³⁰ benchmarks English proficiency in 54 countries using a sample of just under two million people:

One point per language per country was allocated for those with only a moderate level of English, two points for those with low proficiency and three points for those with very low proficiency (see Table 8).

The prevalence of different languages on the internet (Indicator 10)

Chart 4, compiled from Internet World Stats, shows that, although English is still the most dominant language on the internet, Chinese is running a close second. Spanish and Japanese are the next most frequently used languages.

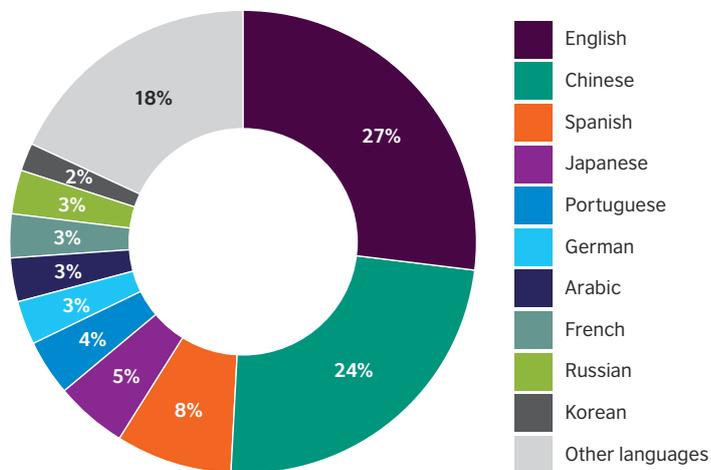
Details of the scores, evidence and rationale behind each indicator are provided in the Appendix.

Table 8: English proficiency

LEVEL OF PROFICIENCY IN ENGLISH	COUNTRIES RELEVANT TO THIS STUDY	LANGUAGES CONCERNED
Very low	Chile, Kuwait, Brazil, Egypt, UAE, Colombia, Saudi Arabia	Spanish, Arabic, Portuguese
Low	Indonesia, Iran, Russia, Taiwan, Vietnam, Turkey, China, Qatar, Mexico	Spanish, Indonesian, Farsi, Russian, Chinese languages, Vietnamese, Turkish, Arabic
Moderate	Spain, Portugal, Japan, France, Italy	Indian languages, French, German, Spanish, Portuguese, Japanese, Italian
High	Belgium, Austria, Germany, Poland, Singapore, Malaysia	Dutch, French, German, Polish, Malaysian
Very high	Sweden, The Netherlands, Norway	Swedish, Dutch, Norwegian

Source: English Proficiency Index: www.ef.co.uk/epi

Chart 4: Internet use by language



Source: Top ten internet languages: www.internetworldstats.com/stats7.htm

30. English Proficiency Index: www.ef.co.uk/epi

THE TEN MOST IMPORTANT LANGUAGES

Taking all ten indicators used in this analysis into account, the ten languages which emerge as the most important for the UK are as set out in Table 9.

Details of the scores for different languages appear in the Appendix along with an explanation of the evidence underlying each indicator.

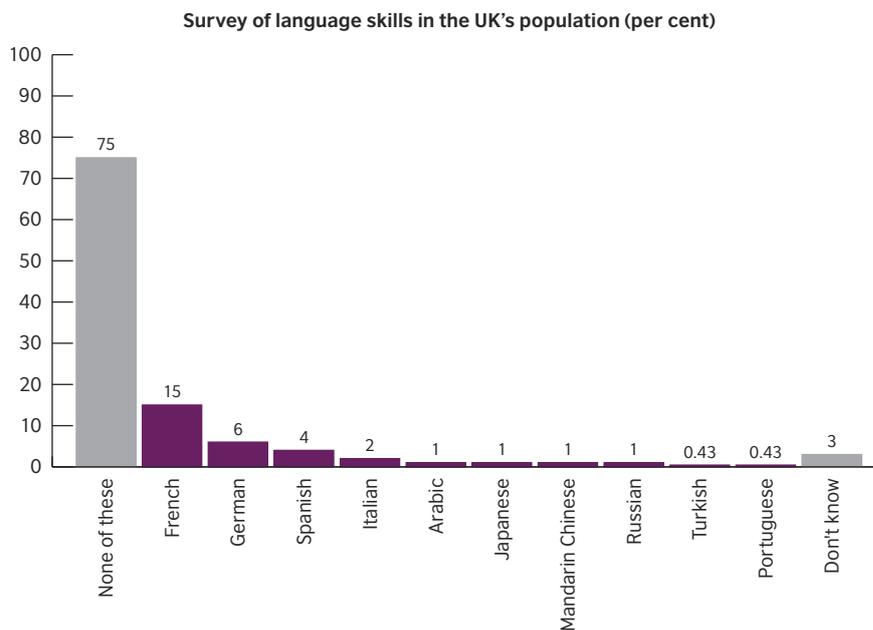
The British Council commissioned a survey from YouGov to find out to what extent the UK population was able to communicate in the languages identified. The results can be seen in Chart 5. It is clear that considerable work needs to be done to increase the UK's language capacity and this report offers a set of recommendations to address the deficit.

Table 9: The top ten languages

LANGUAGE	SCORE
Spanish	76
Arabic	54
French	47
Mandarin Chinese	45.5
German	43.5
Portuguese	41
Italian	22.5
Russian	19
Turkish	19
Japanese	17

Chart 5: Language skills in the UK's adult population

Question: Which, if any, of the following languages can you speak well enough to hold a conversation? (Please tick all that apply)



Source: Survey of 4,171 UK adults, YouGov. Fieldwork was undertaken 1–4 October 2013. The survey was carried out online. The figures have been weighted and are representative of all UK adults (aged 18+).

OTHER LANGUAGES

Beyond the 'top ten' languages identified, there were four other languages, or groups of languages, which emerged as important for the UK according to the indicators used in this report, scoring above ten points each. These were Dutch, Polish, Indian languages and Korean.

The position of **Dutch** reflects the fact that The Netherlands is the second most important non-English speaking goods export market for the UK after Germany.³¹ Belgium, in which Dutch is an official language, and Luxembourg are in fourth place. This accounts for the high demand for Dutch in job advertisements.³² Dutch people are the third most frequent travellers to the UK of any non-English speaking country.

The status of **Polish** is based on Poland being identified as one of the world's rapidly growing markets and the fact that Poland is one of the top ten

destinations for visitors from the UK. The 2011 UK census revealed that Polish is now the third most widely spoken language in the UK after English and Welsh. With over 47,000 speakers, it is the fourth most widely spoken language by English schoolchildren with English as an additional language.³³ Among Scottish pupils it is the most widely spoken language after English with more than 7,000 speakers.³⁴

Indian languages are important because of India's position as the second most populous country in the world and a growing economic power.³⁵ India is currently the UK's 18th largest goods export market worth £4.6 billion in 2012. Indian languages are widely spoken in large minority communities in the UK. Department for Education statistics show Panjabi, Urdu and Bengali as the top three languages spoken by English schoolchildren with English as an additional language.³⁶ Together these account for more than

a third of a million children. In Scotland, Urdu and Panjabi are second and third in importance respectively.³⁷ However, Indian languages are currently taught at the margins of mainstream education, supported by families and local communities.³⁸ Entry numbers at A-level and at GCSE are small³⁹ and Indian languages are not widely available at degree level in British universities.⁴⁰

Korean is spoken as a first language by some 78 million people and is the official language of South Korea, North Korea and parts of China. South Korea is cited by the CBI⁴¹ as one of the world's fastest growing markets and important for the UK's economy over the next decade and beyond. It was a very early adopter of the internet and Korean usage currently accounts for two per cent of the global figures for internet use.⁴² Korean is not available in the UK either as a GCSE or A-level subject.

31. Office for National Statistics (2013) *Publications Tables UK Trade February 2013*: www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcn:77-279148

32. Anne Marie Graham (2013) *Labour Market Intelligence Report – a Picture of the Jobs Market, Summer 2012* in British Academy/Teresa Tinsley, *The State of the Nation. Demand and Supply of Language Skills in the UK*: www.britac.ac.uk/policy/State_of_the_Nation_2013.cfm

33. National Association for Language Development in the Curriculum (2011) *School Census January 2011 Language Data. Number of Compulsory School Age Pupils in Primary, Secondary and Special Schools by Declared First Language*: www.naldic.org.uk/research-and-information/eal-statistics/lang

34. National Statistics (2011) *Pupils in Scotland 2011, Main Home Language?*

35. Office for National Statistics (2013) *Publications Tables UK Trade February 2013*: www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcn:77-279148

36. National Association for Language Development in the Curriculum (2011) *School Census January 2011 Language Data. Number of Compulsory School Age Pupils in Primary, Secondary and Special Schools by Declared First Language*: www.naldic.org.uk/research-and-information/eal-statistics/lang

37. National Statistics (2011) *Pupils in Scotland 2011, Main Home Language.*

38. CILT, SCILT and CILT Cymru (2005) *Community Language Learning in England, Wales and Scotland.*

39. Teresa Tinsley and Kathryn Board (2012) 'Language Learning in Primary and Secondary Schools in England – Languages Trends Survey', CfBT Education Trust

40. British Academy/Teresa Tinsley (2013) *The State of the Nation. Demand and Supply of Language Skills in the UK*, British Academy: www.britac.ac.uk/policy/State_of_the_Nation_2013.cfm

41. Confederation of British Industry/Ernst and Young (2011) *Winning Overseas: Boosting Business Export Performance.*

42. Top ten internet languages – Internet World Stats: www.internetworldstats.com/stats7.htm

خدمة ترك الأمتعة
Left Baggage

الأمتعة كبيرة الحجم
Oversize Baggage

مصارف
Money Exchange

CONCLUSION AND RECOMMENDATIONS

This report argues that, while millions of people around the world are learning English, the UK has fallen behind by not devoting sufficient time, resources and effort to language learning.

The resulting language deficit, if not tackled, is a threat to our competitiveness, influence and standing in the world, as well as to our citizens' ability to play a meaningful role in the global economy and an increasingly networked and interconnected world.

Our analysis has identified those languages which are likely to be of greatest importance to the UK in the next 10–20 years, based on a range of criteria relating to both economic and non-economic factors. Unsurprisingly, there is not a complete coincidence between the languages needed for economic purposes and those required to build trust, deepen international influence and cultural relationships, and keep our country safe. This analysis has identified ten languages (Spanish, Arabic, French, Mandarin Chinese, German, Portuguese, Italian, Turkish, Russian and Japanese) which have the potential to add most value to the UK's strategic interests.

However, the survey commissioned by the British Council for this report shows that there is a low capacity in these key languages in the UK adult population.

French, Spanish and German, the UK's first, second and third most widely taught languages respectively, all appear in the top ten list, as do a number of languages which have very little representation in UK education

systems. The greatest gaps are perhaps in Arabic and Mandarin Chinese, which both appear in the top five. However, Portuguese and Turkish, also present significant challenges for our education systems and Italian, Russian and Japanese also require increased effort to achieve a critical mass of speakers.

The overall conclusion therefore, is not that people in the UK are learning the *wrong* languages, but that the country needs to build on its existing language learning profile to include a wider range of languages and to enable far greater numbers of people to learn languages. This is crucial in order to prevent the current deficit in linguistic skills from increasing and to enable the UK to reap the economic and cultural benefits available to those who have more than one language at their disposal.

We therefore recommend that:

1. All four governments of the UK should take a more strategic approach to language education policy, linking it to national aspirations for international engagement in business, education and culture. Languages should be held in the same high regard as science, technology, engineering, and mathematics (STEM) subjects.
2. Government and business should work together to develop educational

policy relating to languages and international skills, as these have a direct impact on the UK's prosperity and international influence.

3. Businesses should be encouraged to invest in the development of the linguistic skills in their own organisations from which they will benefit directly.
4. Policy makers should find effective ways of utilising the vital language and cultural skills of the UK's diaspora and minority communities. This talent should be used to enable education systems to increase opportunities to learn the ten languages identified here.
5. The teaching and learning of languages should be enriched by the inclusion of new languages in the curriculum, and an increased focus on the need to understand other cultures.
6. Schools should fully exploit the range of free or funded resources available to support language learning, which are available locally, online or through international links. These include language assistants, exchanges and overseas trips, and international cultural institutes in the UK.

7. Young people should be given opportunities to sample a range of languages and cultures during their school career. They and their parents should also seek out more opportunities for language learning outside school, and all students should receive appropriate advice about the benefits of competence in another language for work and adult life.
8. Policy makers and practitioners in the UK should establish wider and deeper partnerships and co-operation with foreign education and cultural bodies in order to access resources and support as well as to learn from best practice in the teaching and learning of languages directly from the countries in which the languages are used.
9. The 75 per cent of UK adults unable to hold a conversation in any of the ten key languages should make efforts to learn the basics of at least one new language, as advocated by Speak to the Future's *1000 Words* campaign.⁴³

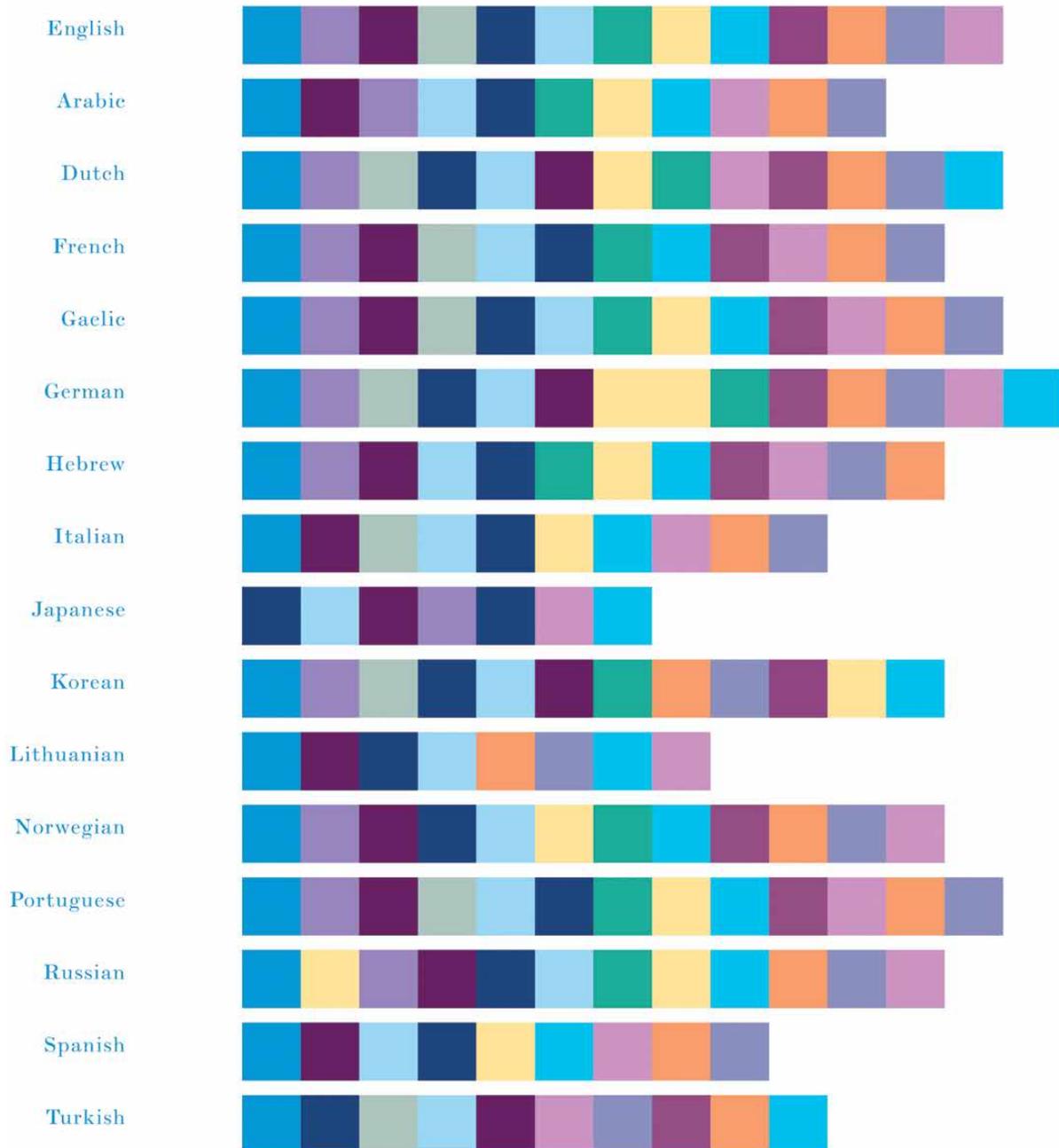
43. www.speaktothefuture.org/1000-words-challenge



Catriona Maciver is a Scottish designer working in Scotland and India. Language has played a significant role in her work throughout college and continues to be an area of interest.

s y n t a x

If we spoke a different language, we would perceive a somewhat different world



This poster was a response to a brief on language whilst studying at Central Saint Martins College of Art and Design (University of the Arts, London). Using a quote by Ludwig Wittgenstein, the poster shows how word order changes from one language to the next, thus potentially changing the meaning. The reader can track the word order in different languages by identifying which word each colour is assigned to.

ARABIC

العربية

Arabic is a Semitic language. With over 230 million native speakers and a further 100–200 million people across northern Africa and western Asia for whom it is their second language, Arabic ranks as the fourth most widely spoken language in the world.⁴⁴

Arabic has official status, sometimes as one of two languages, in many places: Algeria, Bahrain, Chad, Comoros, Djibouti, Egypt, Eritrea, Iraq, Israel, Jordan, Kuwait, Lebanon, Libya, Mauritania, Morocco, Oman, Qatar, Saudi Arabia, Sudan, Syria, Tunisia, United Arab Emirates and Yemen, and the Occupied Palestinian Territories. Many of these have low or very low proficiency in English.

Because of the common written standard form of the language and a shared cultural/religious heritage, most speakers regard all varieties of Arabic as forms of one language. In most Arabic-speaking countries, however, only those with a formal education are proficient in standard Arabic. Modern colloquial Arabic differs significantly from one region to another and exists as a dialect continuum across the Arabic speaking region. Arabic script is also used in languages such as Farsi, Urdu and Pashto.

Arabic is used as an official language of the United Nations, International Criminal Court, African Union, Arab League amongst others.

Three per cent of internet usage is conducted in Arabic.⁴⁵ The Middle East and Africa are amongst the fastest growing regions in terms of internet use.⁴⁶

BUSINESS BENEFITS

Six Arabic speaking countries appear among the UK's top 50 export market in goods, with a combined value to the economy of over £12 billion in 2012 – more than the value of UK exports to Spain, China or Italy.⁴⁷ The Gulf economies are booming as they diversify away from oil and gas, open up their economies and bring down barriers to trade and investment. Significant opportunities exist for British companies, particularly in supporting the vast infrastructure work planned in the region.

Egypt, Saudi Arabia and the United Arab Emirates have all been identified by the Confederation of British Industry as priority markets.⁴⁸ This is endorsed by the Department for Business, Innovation and Skills.

INTERNATIONAL CONNECTIONS

Arabic has emerged as one of the priority languages for the Foreign and Commonwealth Office. It is their intention to increase the number of diplomats trained in Arabic by 40 per cent.

Morocco, Egypt and Tunisia are popular holiday destinations for tourists from the UK though Arabic speaking countries have not been prioritised for tourist links. The World Cup will be hosted by Qatar in 2022 and will attract large numbers of visitors.⁴⁹

In its international education strategy, the UK government identifies both Saudi Arabia and the Gulf as priorities for the development of educational partnerships in response to the region's economic growth and expanding political influence as well as its increasing interest and investment in education.⁵⁰

A number of UK universities have established a campus presence in the region, specifically in the United Arab Emirates. These include Heriot-Watt and Exeter universities and the London and Manchester business schools.⁵¹



‘In my work, Arabic has enabled me to relate to contacts in the Middle East and North Africa on their own terms. People respect the fact that I have invested time and effort in their language and culture. Knowledge of Arabic – I am far from being fluent, but that’s not the point – helps understanding what is going on around me.

At the personal level, Arabic allows me to feel at home in Beirut and Baghdad, Damascus and Tripoli, and now in Jerusalem. It means I can make lasting friendships. Since I have no sense of direction, when I get lost while driving – a frequent occurrence – I can ask passers-by for directions and, on a good day, understand what they say!’

Vincent Fean, British Consul General, Jerusalem

ARABIC IN THE UK

In 2010 there were some 20,000 Arabic speakers among London schoolchildren, making Arabic the sixth most commonly spoken heritage language in the capital. This number is increasing.⁵²

Approximately four per cent of English secondary schools teach Arabic, often as an extra-curricular subject. It is also widely taught in the 172 schools belonging to the Association of Muslim Schools and in the supplementary sector.⁵³

Arabic was first offered as a GCSE subject in 2002 with the number of entries rising by 82 per cent to 3,236 in 2012, making Arabic the eighth most popular language at GCSE.⁵⁴

A-level Arabic was also introduced in 2002 and had 299 entries, rising to 604 in 2012, making Arabic the tenth most popular language at A-level. Scottish examinations taken at school level are not available in Arabic.⁵⁵

Arabic is offered at degree level by 15 UK universities.⁵⁶

Only one per cent of the UK’s adult population report that they speak Arabic well enough to hold a conversation.⁵⁷

FURTHER INFORMATION

Arab British Centre:
www.arabbritishcentre.org.uk

English words derived or adopted from Arabic include:

**ALGEBRA TARIFF
MAGAZINE SOFA**

44. Ethnologue: www.ethnologue.com/statistics/size

45. Top ten internet languages – Internet World Stats: www.internetworldstats.com/stats7.htm

46. British Academy (forthcoming) *Lost for Words. The Need for Languages in UK Diplomacy and Security*.

47. Office of National Statistics (August 2013) ‘UK Trade, June 2013’ in Statistical Bulletin; available at www.ons.gov.uk/ons/dcp171778_318161.pdf

48. Confederation of British Industry/Ernst & Young (2011) *Winning Overseas: Boosting Business Export Performance*.

49. House of Commons library (2013) *Tourism. Standard Note SN/EP/6022*.

50. HM Government (2013) *International Education: Global Growth and Prosperity*.

51. British Academy/Teresa Tinsley (forthcoming) *The State of the Nation. Demand and Supply of Language Skills in the UK*: www.britac.ac.uk/policy/State_of_the_Nation_2013.cfm

52. John Eversley et al. (2010) *Language Capital. Mapping the Languages of London’s Schoolchildren*, CLT/Institute of Education.

53. Teresa Tinsley (unpublished) *The Teaching of Arabic language and culture in UK schools*, British Council.

54. Teresa Tinsley and Kathryn Board (2012) ‘Language Learning in Primary and Secondary Schools in England – Languages Trends Survey’, CfBT Education Trust.

55. *ibid.*

56. British Academy/Teresa Tinsley (2013) *The State of the Nation. Demand and Supply of Language Skills in the UK*: www.britac.ac.uk/policy/State_of_the_Nation_2013.cfm

57. YouGov (October 2013) (available on request from the British Council).

FRENCH FRANÇAIS

French is a Romance language spoken by more than 70 million people as their first language, although it is estimated that a further 100–200 million people around the world speak French as a second language.

French is the official language in France, Monaco, Gabon, Togo, Benin, Guinea, Mali, Niger, and Ivory Coast.

It is also an official language in Belgium, Burkina Faso, Burundi, Cameroon, Canada, Central African Republic, Chad, Comoros, Djibouti, Equatorial Guinea, Haiti, Luxembourg, Madagascar, Rwanda, Seychelles, Switzerland, and Vanuatu.

It is closely linked to other Romance languages: such as Italian, Spanish and Portuguese. Varieties of spoken French can vary considerably and may be considered separate languages, e.g. Walloon spoken in Belgium.

French is an official language of many international organisations including the United Nations, International Criminal Court, World Trade Organisation, Universal Postal Union, Organisation

of Islamic Cooperation, International Labour Organisation, International Olympic Committee, International Telecommunications Union, Inter-parliamentary Union, Organisation for Economic Co-operation and Development, African Union, Benelux, Common Market for East and South Africa (and other international African organisations), Council of Europe, European Union, North Atlantic Treaty Organisation and the Organisation for Security and Cooperation in Europe.

In terms of internet usage, French is currently the language of choice for 60 million users, making it the eighth most widely used language on the internet.⁵⁸

BUSINESS BENEFITS

France is the UK's third most important non-English speaking export market.

Combined, France, Belgium and Luxembourg account for nearly £35 billion of British goods exports.⁵⁹ French speaking countries are also a major source of imports into the UK with France in fourth place. A 2011 report from the Department for Business, Innovation and Skills states that: *the EU is likely to remain the major market for British trade and investment over the medium term, with Germany, France and Benelux countries likely to remain our most important trade partners.*⁶⁰

French is the language most sought after by those employers looking for language skills (49 per cent).⁶¹ It was also the second most frequently requested language in a survey of job advertisements carried out by Graham in 2012.⁶² A survey carried out by the British Chambers of Commerce

58. Top ten internet languages – World Internet Stats: www.internetworldstats.com/stats7.htm

59. Office of National Statistics (August 2013) 'UK Trade, June 2013' in Statistical Bulletin; available at www.ons.gov.uk/ons/dcp171778_318161.pdf

60. Department for Business, Innovation and Skills (2011) *Trade and Investment for Growth*.

61. Confederation of British Industry and Pearson (2013) *Changing the Pace. CBI/Pearson Education and Skills Survey 2013*.

62. Anne Marie Graham (2013) *Labour Market Intelligence Report – a Picture of the Jobs Market, Summer 2012* in British Academy/Teresa Tinsley, *The State of the Nation. Demand and Supply of Language Skills in the UK*: www.britac.ac.uk/policy/State_of_the_Nation_2013.cfm

63. British Chambers of Commerce (2012) *Exporting is Good for Britain – Skills*.

64. House of Commons library (2013) *Tourism. Standard Note SN/EP/6022*.

65. English Proficiency Index: www.ef.co.uk/ept

66. National Association for Language Development in the Curriculum (2011) *School Census January 2011 Language Data. Number of Compulsory School Age Pupils in Primary, Secondary and Special Schools by Declared First Language*: www.naldic.org.uk/research-and-information/eal-statistics/lang

67. National Statistics (2011) *Pupils in Scotland 2011. Main Home Languages*.

68. John Eversley et al. (2010) *Language Capital. Mapping the Languages of London's Schoolchildren*, CILT/Institute of Education.

69. Teresa Tinsley and Kathryn Board (2012) 'Language Learning in Primary and Secondary Schools in England – Languages Trends Survey', CfBT Education Trust. Scottish Qualifications Authority (2013) National Course and Awards Result Statistics 2013.

70. *ibid.*

71. British Academy/Teresa Tinsley (2013) *The State of the Nation. Demand and Supply of Language Skills in the UK*: www.britac.ac.uk/policy/State_of_the_Nation_2013.cfm

72. YouGov (October 2013) (available on request from the British Council).

English words derived or adopted from French include:

DESIRE POWER
BEEF ANNUAL
ODOUR

of its members in 2012 revealed that: *French is the most commonly spoken language, but only four per cent of business owners surveyed claim that they are able to converse fluently enough to conduct business deals.*⁶³

French is particularly useful as a lingua franca in countries such as Algeria and Morocco or Vietnam and Cambodia, which have a low proficiency in English.

INTERNATIONAL CONNECTIONS

French has long been a key language for diplomacy and remains an important language for the Foreign and Commonwealth Office.

French is extremely important for both inward and outward tourism. France is the second most popular destination for people from the UK travelling abroad and the UK's biggest market for

incoming tourists (3.8 million visits in 2012 spending £1.5 billion) with Belgium also in the top ten with more than one million incoming visitors.⁶⁴

The English Proficiency Index rates France as a country with moderate levels of proficiency in English.⁶⁵

FRENCH IN THE UK

French is the tenth most widely spoken community language in England⁶⁶ and in Scotland.⁶⁷ In London alone it is spoken by over 13,000 schoolchildren, of whom more than two thirds are black or non-white minority.⁶⁸

In spite of the decline in student numbers opting to do languages at school, French remains the language most often studied at A-level and Scottish Highers with 40 per cent of all advanced level language entries.⁶⁹

It also has the greatest number of entries for GCSE and Scottish equivalent exams. At primary level French dominates with 74 per cent of schools offering pupils tuition in French.⁷⁰

It is the most frequent language offered for study at higher education across all four nations of the UK, with a total of 70 universities offering degree courses in French.⁷¹

Fifteen per cent of the UK's adult population report that they speak French well enough to hold a conversation.⁷²

FURTHER INFORMATION

Institute Francais:
www.institut-francais.org.uk

Alliance Francaise:
www.alliancefrancaise.org.uk



Kristin Scott Thomas is an English actress, most famous for her roles in *Four Weddings and a Funeral*, *The English Patient* and Philippe Claudel's *I've Loved You So Long*. While training to become a drama teacher in London, she was told she would never be a good enough actress and so she went to work as an au pair in Paris aged 19. Speaking French fluently, she studied acting at the *École nationale supérieure des arts et techniques du théâtre* in Paris, and her incredible career took off from there.

www.thirdyearabroad.com/advice-and-tips/celebrity-linguists/item/1339-kristin-scott-thomas-speaking-french.html

GERMAN DEUTSCH

German is a West Germanic language. With over 110 million native speakers, German is the tenth most widely spoken language in the world.

German is also in first place in terms of numbers of native speakers in the European Union⁷³ with 24 per cent of the population giving German as their first language. There is considerable variation between the spoken dialects of German but a common standard of the language has official status in Germany, Austria, Switzerland, Belgium and Luxembourg. German is also spoken in Alsace-Lorraine (France), in Alto Adige (Italy) and in Liechtenstein. There are also about 1.5 million speakers of German in the United States as well as communities of German speakers in other parts of the world.

It is one of the working languages of the EU and an official language of the Organisation for Security and Cooperation in Europe.

German is the sixth most common language on the internet, with more than 75 million users.⁷⁴

BUSINESS BENEFITS

Germany is the UK's most important trading partner, its second biggest export market in goods (worth £32 billion in 2012) and also its greatest source of imports. To these impressive export figures can be added those of Luxembourg and Switzerland (also in the UK's top ten export markets) and Austria which boosts the UK's exports by £1.5 billion.⁷⁵ According to the Department for Business, Innovation and Skills (BIS): *The EU is likely to remain the major market for British trade and investment over the medium term, with Germany, France and Benelux countries likely to remain our most important trade partners.*⁷⁶

BIS not only considers Germany the UK's most important trading partner and competitor but also an interesting model for the development of the UK's economy. One example of this is the international focus of Germany's small and medium enterprises and their

competitiveness in capital goods. There is a considerable presence of German companies in the UK following many mergers and acquisitions between UK/German companies, e.g. Vodafone's purchase of Mannesmann in 2000.

According to the 2013 Education and Skills survey by the Confederation of British Industry,⁷⁷ German is the second most sought after language in industry with 45 per cent of those businesses requiring languages citing German as the language they most needed. This is supported by many other sources of labour market intelligence which show German to be the most frequently-requested language in job advertisements.⁷⁸

In spite of all the evidence for the importance of the German speaking markets for trade and the need expressed by employers in 2012, the British Chambers of Commerce, reporting in 2012, revealed that 57 per cent of exporting businesses

73. European Commission (2012) *Europeans and Their Languages. Special Eurobarometer 386.*

74. Top ten internet languages – world Internet statistics: www.internetworldstats.com/stats7.htm

75. Office of National Statistics (August 2013) 'UK Trade, June 2013' in Statistical Bulletin; available at www.ons.gov.uk/ons/dcp171778_318161.pdf

76. Department for Business, Innovation and Skills (2011) *Trade and Investment for Growth.*

77. Confederation of British Industry and Pearson (2013) *Changing the Pace. CBI/Pearson Education and Skills Survey 2013.*

78. Anne Marie Graham (2013) *Labour Market Intelligence Report – a Picture of the Jobs Market, Summer 2012* in British Academy/Teresa Tinsley, *The State of the Nation. Demand and Supply of Language Skills in the UK*: www.britac.ac.uk/policy/State_of_the_Nation_2013.cfm

79. British Chambers of Commerce (2012) *Exporting is Good for Britain – Skills.*

80. House of Commons library (2013) *Tourism. Standard Note SN/EP/6022.*

81. Teresa Tinsley and Kate Board (2013) *Language Learning in Primary and Secondary Schools in England. Findings from the 2012 Language Trends survey, CfBT Educational Trust.*

82. Joint Council for Qualifications (2013) *A, AS and AEA Results, Summer 2013.*

83. British Academy/Teresa Tinsley (2013) *The State of the Nation. Demand and Supply of Language Skills in the UK*: www.britac.ac.uk/policy/State_of_the_Nation_2013.cfm

84. YouGov (October 2013).

‘As Deputy Director General of the CBI, I represent the interests of British business in Europe. Knowing German has proved essential: from the practical necessity of conversing, or reading and understanding documents, to the benefit of being able to build strong and sustainable working relationships.’

Dr Neil Bentley
Confederation of British Industry Deputy Director-General and Chief Operating Officer

Neil Bentley has A-levels in French, German and English, spent gap year working on French campsites, studied French, German and European Politics and has a PhD on German Industrial Relations.



had no one who spoke any German at all and only two per cent had any staff with enough German to conduct business deals.⁷⁹

INTERNATIONAL CONNECTIONS

Germany is the UK’s second most important market for inward tourism, with three million Germans visiting the UK in 2012, spending £1.2 billion. It is also the seventh most visited country for people from the UK travelling abroad, accounting for 2.3 million visits in 2012. During the Olympic Games in 2012, Germany was the third biggest source of overseas visitors, after the USA and France.⁸⁰

Germany is the world’s third largest contributor to research and development, making German particularly important for scientific research and placing it in second place after English as the most important scientific language.

GERMAN IN THE UK

The significance of German to business and research does perhaps explain the concerns expressed from time to time by policy makers and academics about the decline of German study in the UK.

German used to be the second most widely taught language in the UK and still retains this status in some parts of the UK. However, overall Spanish now occupies second position.

German has seen declining entry figures at GCSE/Scottish standard grade over the last ten years.⁸¹

It is the third most widely studied language at A-level/Scottish Higher level, but over the last decade it has suffered from severe declines at this level, too.⁸²

At the level of higher education, too, German remains the third most widely offered language with more than 60

universities across the UK offering degree level courses (though there have been some closures of German departments in recent years).⁸³

Only six per cent of the UK’s adult population report that they speak German well enough to hold a conversation.⁸⁴

FURTHER INFORMATION

Goethe Institute:
www.goethe.de

English words derived or adopted from German include:

KINDERGARTEN ZEITGEIST
WANDERLUST DELICATESSEN
SCHADENFREUDE

ITALIAN ITALIANO

Italian is a Romance language. It has approximately 70 million first language speakers.

Regional varieties of Italian differ widely from the standard language, with some varieties e.g. Sicilian being regarded by some as a separate language. Italian is closely linked to other Romance languages: such as French, Spanish and Portuguese.

Italian is the official language of Italy and parts of Switzerland. It is also used by minority communities in a number of countries including Malta, Libya, Somalia, Slovenia, Croatia, as well as by expatriate communities in the USA, UK, Argentina and Australia.

Italian is an official language of the European Union, the Latin Union and the Organisation for Security and Cooperation in Europe.

BUSINESS BENEFITS

Italy is the UK's ninth largest non-English speaking goods export market and in 2012 was worth more than £8 billion to the UK economy. It is the UK's eighth largest source of imports.⁸⁵

Although Italian is not mentioned in

education and skills surveys carried out by the Confederation of British Industry,⁸⁶ other sources of labour market intelligence give Italian a higher profile. It is, for example, cited in the 2012 British Chambers of Commerce survey as one of the languages for which there is a deficit with only one per cent of businesses surveyed reporting levels of Italian which were good enough to conduct business deals leading to exports.⁸⁷ In research carried out in 2012, Italian appeared in 14 per cent of job advertisements for languages, making it the fourth most frequently requested language. It was a requirement particularly noted in the financial sector.⁸⁸

INTERNATIONAL CONNECTIONS

Italian is very important as a tourist language, both for incoming and outgoing visits. Italy is the fourth most popular destination for UK tourists. In 2012, there were around 2.6 million outgoing visits from the UK to Italy. In the same year, the

1.5 million visits from Italy to the UK accounted for about five per cent of visits to the UK.⁸⁹

The English Proficiency Index rates Italy as a country with moderate levels of proficiency in English.⁹⁰

ITALIAN IN THE UK

Italian is a popular language in adult education and there are sizeable communities of Italian speakers in all parts of the UK though their numbers may be under-reported because the communities are so well established and integrated.

Italian is the seventh most popular language at A-level (coming after French, German, Spanish, Mandarin Chinese, Russian and Polish) but has fewer than 1,000 entries. This number of entries has remained steady over the past five years in contrast to entry numbers for Mandarin Chinese, Russian and Polish, which have grown considerably.⁹¹

85. Office of National Statistics (August 2013) 'UK Trade, June 2013' in Statistical Bulletin; available at www.ons.gov.uk/ons/dcp171778_318161.pdf

86. Confederation of British Industry and Pearson (2013) *Changing the Pace. CBI/Pearson Education and Skills Survey 2013*.

87. British Chambers of Commerce (2012) *Exporting is Good for Britain – Skills*.

88. Teresa Tinsley (2013) *The State of the Nation. Demand and Supply of Language Skills in the UK*, British Academy: www.britac.ac.uk/policy/State_of_the_Nation_2013.cfm

89. House of Commons library (2013) *Tourism. Standard Note SN/EP/6022*.

90. English Proficiency Index: www.ef.co.uk/epi

91. Joint Council for Qualifications (2013) *A, AS and AEA Results, Summer 2013*.

92. Teresa Tinsley and Kathryn Board (2012) 'Language Learning in Primary and Secondary Schools in England – Languages Trends Survey', CfBT Education Trust.

93. British Academy/Teresa Tinsley (2013) *The State of the Nation. Demand and Supply of Language Skills in the UK*: www.britac.ac.uk/policy/State_of_the_Nation_2013.cfm

94. YouGov (October 2013) (available on request from the British Council).

English words derived or adopted from Italian include:

SOLO BALCONY
STUDIO MALARIA
UMBRELLA

At GCSE, Italian is the fourth language after French, German and Spanish though the numbers of entries are very small (5,000 compared to 150,000 for French). However, whereas French and German have seen significant declines in entries of 24–25 per cent over a five-year period, entries for Italian have only dropped by seven per cent. At school level interest in Italian is particularly strong in the independent sector.⁹²

Italian is offered for degree level study in some 40 universities in England, Scotland and Wales.⁹³

Only two per cent of the UK's adult population report that they speak Italian well enough to hold a conversation.⁹⁴

FURTHER INFORMATION

Italian Cultural Institutes:
www.icilondon.esteri.it/
IIC_Londra (London)

www.iicedimburgo.esteri.it/
IIC_Edimburgo (Edinburgh)



‘When I was inspired by the art and food of Italy to study Italian for GCSE, I had no idea that my eventual fluency in the language would transform my career; it has propelled me towards so many exciting opportunities! For example, as a bilingual student, I was asked to edit the Sightseeing section of *Time Out*’s Florence guidebook. Most importantly, speaking Italian put me in a unique position to leap at the new business opportunity I spotted! My language and intercultural skills were invaluable for starting my company; we have foreign clients, a multilingual team, an international outlook. On a personal note, I am much more resourceful and independent, thanks to my year abroad.’

Lizzie Fane, Founder of ThirdYearAbroad.com

JAPANESE

日本語

Japanese is an East Asian language and the official language of Japan. It is ranked ninth in the world with over 120 million speakers.

Although Japanese uses a number of different scripts and is usually written vertically beginning on the right, many texts today are written horizontally to allow for the inclusion of English words, Arabic numerals and mathematical and chemical formulas.

Japanese is the fourth most common language on the internet with a share of five per cent.⁹⁵

BUSINESS BENEFITS

Japan is the world's third largest economy and a significant contributor to UK prosperity – both as an export market and as a major investor. In 2012 the value of the UK's imports in goods was £8.5 billion, putting Japan in 13th place as provider of goods to the UK. In the same period, exports in goods to Japan were £4.9 billion, making it the UK's 15th largest export market.⁹⁶ According to the British

Embassy in Tokyo, the value of the UK's exports to Japan of goods and services combined was nearly £10 billion in the same period.

UK exports to Japan include chemicals, pharmaceuticals, automotive components and cars, electrical machinery and scientific instruments.

There are some 450 British companies operating in Japan including Rolls Royce, GSK, AstraZeneca, BT, and Dyson. Many British retailers and designers such as Burberry, Top Shop, Lush and Paul Smith also have a presence in Japan – for many it is their largest market outside the UK. Success in Japan can enhance a company's global competitive position and bring significant financial and technological gains.

The UK benefits from Japan's substantial investment with some 1,400 Japanese companies located in the UK, including

100 who have based their European headquarters in the UK. The UK is by far the biggest destination for Japanese investment in Europe, and in 2012 Japan was the second biggest investor in the UK after the US. Japanese owned companies currently employ more than 100,000 people in the UK. Nissan, Toyota and Honda account for 50 per cent of vehicle manufacturing in the UK. The ICT and pharmaceutical/healthcare sectors are also significant sources of investment,⁹⁷ while Hitachi has recently invested in rolling stock manufacture and nuclear power.

Japanese companies are highly innovative and Japan is the world's second largest investor in research and development. There are currently around 6,000 Japanese research scientists based in the UK and around 1,000 UK researchers working in Japan.⁹⁸

95. Top ten internet languages – Internet World Stats: www.internetworldstats.com/stats7.htm

96. Office of National Statistics (August 2013) 'UK Trade, June 2013' in *Statistical Bulletin*; available at www.ons.gov.uk/ons/dcp171778_318161.pdf

97. *ibid.*

98. *ibid.*

99. English Proficiency Index: www.ef.co.uk/epi

100. www.gov.uk/government/priority/increasing-business-with-japan

101. www.gov.uk/government/priority/working-with-japan-and-others-to-reduce-conflict and www.gov.uk/government/priority/pursuing-an-active-foreign-policy-with-japan

102. www.gov.uk/government/priority/uk-science-and-innovation-network-working-with-japan

103. Joint Council for Qualifications (2013) *GCSE and Entry Level Certificate Results, Summer 2013*.

104. Joint Council for Qualifications (2013) *A, AS and AEA Results, Summer 2013*.

105. British Academy/ Teresa Tinsley (2013) *The State of the Nation. Demand and Supply of Language Skills in the UK*, British Academy: www.britac.ac.uk/policy/State_of_the_Nation_2013.cfm

106. YouGov (October 2013) (available on request from the British Council).

English words derived or adopted from Japanese include:

**KIMONO KARATE
SAMURAI GEISHA
KAMIKAZE**

INTERNATIONAL CONNECTIONS

The English Proficiency Index rates Japan as a country with moderate proficiency in English.⁹⁹ The UK government is committed to supporting improvement of English language teaching in Japanese education.¹⁰⁰

Japan continues to play an important role in high level international fora and as a major provider of development assistance. The Foreign and Commonwealth Office considers Japan an important partner in matters of climate policy; energy and resource security; the reform of financial institutions; counter-proliferation, Afghan reconstruction, and engagement in other regions of the world; and the tackling of cyber-attacks.¹⁰¹

Japan has also been identified as a priority in the UK Science and Innovation Network, which promotes international collaboration in science, technology and innovation by providing opportunities to work with the best in the world, exchange students and researchers, and gain access to large scale international facilities.¹⁰²

JAPANESE IN THE UK

Just over 1,000 pupils took a GCSE in Japanese in 2013, which represents an increase of about one third over ten years.¹⁰³

The number of young people studying Japanese to A-level in the UK is very small with only 261 sitting the examination in 2013.¹⁰⁴

Japanese can be studied to degree level in around 20 universities in England, Scotland and Wales.¹⁰⁵

Only one per cent of the UK's adult population report that they speak Japanese well enough to hold a conversation.¹⁰⁶

FURTHER INFORMATION

The Japan Foundation:
www.jpf.org.uk

Japan Exchange and Teaching Programme:
www.jetprogramme.org/e/introduction/index.html



‘Speaking Spanish and Japanese has opened doors in my career and helped me bridge cultural differences, both in my personal and business life. [...] During my football career I realised quickly what difference language skills can make.’

Gary Lineker

Quoted on www.rosstattstone.co.uk/blog/gary-lineker-supports-languages4schools

MANDARIN CHINESE

简体中文

Chinese refers to a group of Sino-Tibetan languages with collectively over 1,200 million native speakers. Mandarin Chinese (Putonghua), the language with official status in China, Taiwan, and Singapore, is the most widely spoken in the world with 800 million speakers, mostly in China.

Another Chinese language, Cantonese, is spoken by about 45 million people in China and is one of the most widely spoken languages of Chinese communities outside China.

Since all Chinese languages share a common written form it is possible to refer to a single written Chinese language.

Almost a quarter of internet usage is conducted in Chinese (24 per cent); this makes it the second biggest language online after English.¹⁰⁷

Mandarin Chinese is an official language of the United Nations and the International Criminal Court.

BUSINESS BENEFITS

China is currently the UK's seventh largest export market in goods, with

a value of £10.5 billion in 2012 and its second largest source of imports, equivalent to £31.5 billion in 2012, resulting in the largest trade deficit the UK has with any country in the world.¹⁰⁸

Thirty years of uninterrupted growth averaging ten per cent per annum has transformed China into the second largest economy in the world. Given its rapid growth and status as a major emerging power, the business opportunities and challenges in China are great. The UK is a top EU investor in China and, in return, receives valuable inward investment from China. The next two decades are likely to see a significant growth in demand from China's rapidly growing middle classes for higher value-added goods and services as well as a significant increase in international activity by China's major companies. It is important that the UK

continues to benefit from the growth of China through increased exports and higher levels of inward investment by China.

INTERNATIONAL CONNECTIONS

With the rapidly changing international picture, languages such as Mandarin Chinese are becoming strategically important to the UK and internationally. Mandarin Chinese is one of the priority languages for the Foreign and Commonwealth Office and additional diplomatic posts are being created in China reflecting its growing economic and strategic importance. The number of posts for Mandarin Chinese speakers is expected to rise by 40 per cent.¹⁰⁹

Tourism will become increasingly important as the travel patterns of the rapidly increasing middle classes in

107. Top ten internet languages – Internet World Stats: www.internetworldstats.com/stats7.htm

108. Office of National Statistics (August 2013) 'UK Trade, June 2013' in Statistical Bulletin; available at www.ons.gov.uk/ons/dcp171778_318161.pdf

109. British Academy (forthcoming) *Lost for words. The Need for Languages in UK Diplomacy and Security*.

110. UK Commission for Employment and Skills/Matthew Williams (2012) *Sector Skills Insights: Tourism*.

111. HM Government (2013) *International Education: Global Growth and Prosperity?*

112. British Council – Generation UK: www.britishcouncil.org/more/study-work-create/generation-uk

113. National Association for Language Development in the Curriculum (2011) *School Census January 2011 Language Data. Number of Compulsory School Age Pupils in Primary, Secondary and Special Schools by Declared First Language*: www.naldic.org.uk/research-and-information/eal-statistics/lang

114. National Statistics (2011) *Pupils in Scotland 2011. Main Home Language*.

115. Teresa Tinsley and Kathryn Board (2012) 'Language Learning in Primary and Secondary Schools in England – Languages Trends Survey', CfBT Education Trust.

116. *ibid.*

117. Joint Council for Qualifications (2013) *A, AS and AEA Results, Summer 2013*.

118. Scottish Qualifications Authority (2013) *National Course and Awards Result Statistics 2013*.

119. British Academy/Teresa Tinsley (2013) *The State of the Nation. Demand and Supply of Language Skills in the UK*, British Academy: www.britac.ac.uk/policy/State_of_the_Nation_2013.cfm

120. www.hanban.edu.cn

121. YouGov (October 2013) (available on request from the British Council).

English words derived or adopted from various Chinese languages include:

TEA TYPHOON KOWTOW

China change and the UK Commission for Employment and Skills has stated that: ... *understanding the desires and motivations of Chinese and Indian travellers will be fundamental to success in these markets.*¹¹⁰

By 2020, China will be one of four countries accounting for over half of the world's population of 18–22 year olds making it a priority country for international education, not only because it has one of the largest education systems in the world but also because it is expected to send the most students abroad.¹¹¹

The British Council provides an online portal with information on study opportunities and delivery programmes such as Generation UK, which promotes study and internship opportunities in China. It aims to increase the number of UK students going to China by 20 per cent to 15,000 over three years.¹¹²

A number of UK universities have a campus presence in China including the universities of Nottingham and Surrey, and Manchester Business School.

CHINESE IN THE UK

In 2011, the Department for Education census revealed some 16,500 Chinese speakers (a distinction was not made between varieties of Chinese) amongst English schoolchildren with English as an additional language, putting Chinese in twelfth place.¹¹³ In Scotland, Cantonese is the fifth most widely spoken language by pupils with English as a second language (1,458) and Mandarin Chinese 11th with 527 pupils.¹¹⁴

GCSE entries for Mandarin Chinese declined by 15 per cent from around 3,000 in 2008 to 2,500 in 2012¹¹⁵ but rose again in 2013.¹¹⁶

Entries at A-level, however, have grown rapidly to 3,425 in 2012 (an increase of 25 per cent), making Mandarin Chinese the fourth most popular language after French, German and Spanish.¹¹⁷ In Scotland, entries for Chinese language exams have been growing from a very small base. There were 66 entries for Chinese Higher in 2013.¹¹⁸

Mandarin Chinese is available at degree level in around 30 universities in England, Scotland and Wales.¹¹⁹

China is keen to promote Mandarin Chinese and has established a worldwide network of Confucius Institutes to promote its language and cultural studies. The UK has 13 Confucius Institutes as well as a network of school-based Confucius Classrooms.¹²⁰

Only one per cent of the UK's adult population report that they speak Mandarin Chinese well enough to hold a conversation.¹²¹

FURTHER INFORMATION

Confucius Institutes:
<http://confuciusinstitutes-uk.net/main>

'Learning Mandarin has been an incredibly exciting and rewarding experience and has had a profound effect on my life. Since beginning my Chinese studies at secondary school, I had the opportunity to take part in several Chinese language programmes organised by the British Council and travelled to China many times. As part of my degree, I spent a year in China studying Chinese at Beijing Normal University which was a fantastic experience. Having recently graduated with a degree in Chinese, I've just moved to Shanghai for a new job in a consultancy company. Learning Mandarin has played a vital role in shaping my life.'

Nishat Ali, from Newham in London, was one of the winners of the first HSBC/British Council Mandarin Chinese Speaking Competition in 2003. She went on to study Chinese at School of Oriental and African Studies (SOAS) and now works for CRCC Asia in Shanghai.



PORTUGUESE PORTUGUÊS

Portuguese is a Romance language and has some 180 million first language speakers, mostly in Brazil (over 90 per cent) and Portugal, making it the seventh most widely spoken language in the world.

As well as being the official language of both Brazil and Portugal, Portuguese also has official status as a second or additional language in Angola, Mozambique, Cape Verde, Guinea-Bissau, São Tomé-Príncipe and Timor-Leste.

Portuguese is closely linked to other Romance languages: such as French, Spanish and Italian. European Portuguese and Brazilian Portuguese differ to a certain extent, but are mutually intelligible. There are a number of Portuguese-based creoles which are considered to be distinct languages.

Portuguese is used in the following international organisations: European Union, Organisation of Ibero-American States, African Union, Common Market for Eastern and Southern Africa, Economic Community of West African States, Organisation of American States, Southern African Development Community and the Union of South American Nations.

Portuguese is the fifth largest language on the internet, with four per cent of online usage.¹²²

BUSINESS BENEFITS

Brazil is the seventh largest economy in the world, accounting for 55 per cent of South America's GDP and with significant regional importance in

trade negotiations. As one of the world's emerging powers, Brazil is experiencing rapid growth with its economy forecast to grow by four to five per cent per year over the medium term. Although its growing middle classes are becoming increasingly important consumers of higher value goods and services, Brazil currently ranks 27th in terms of the UK's export market in goods, with Portugal 36th. Imports to the UK for the same period had a value of £2.5 billion from Brazil and £1.7 billion from Portugal, resulting in a slight trade surplus for the UK.¹²³

According to the Department for Business, Innovation and Skills: *Brazil offers big opportunities notably in energy, services and science. But overall the bilateral trade and investment relationship is underdeveloped.*¹²⁴

Opportunities for UK companies are immense but UK businesses find the Brazilian business environment a challenge in terms of cost and complexity. British investments include oil and gas, mining and financial services and there are opportunities to build on the strong relationship between the London 2012 Olympic and Paralympic Games and Rio 2016 Games. With Brazil the most cited science base outside the G8, there are opportunities to capitalise on burgeoning UK–Brazil scientific co-operation and collaboration, including in the areas of pharmaceuticals and energy.

Brazil has been identified by the UK government as a priority country for international education.¹²⁵ Brazil is keen to build further on their successful programme of government-funded scholarships entitled 'Science without Borders' which places 10,000 undergraduate and postgraduate students in the UK to study subjects of major importance to the development of Brazil. This scheme will generate over £200 million for the UK economy. The UK Education Unit, along with a number of UK organisations, is exploring new ways to respond to the growing demand for English language training in Brazil.¹²⁶

INTERNATIONAL CONNECTIONS

The Foreign and Commonwealth Office has stated its intention to increase the numbers of diplomats trained in Latin American Spanish and Portuguese by 20 per cent.¹²⁷

Portugal was the sixth most popular holiday destination for outgoing tourists from the UK in 2011 with 1.9 million visits.¹²⁸

The English Proficiency Index rates Brazil as a country with 'very low' proficiency in English, and Portugal as having 'moderate' proficiency.¹²⁹

‘Some people learn languages for fun. The rest of us are looking for a decent return on our investment. Since only about ten million Brazilians have reasonable English, with Portuguese under your belt you’ll stand out. I did not choose Portuguese; it was thrust on me by the offer of a job in São Paulo. But when I think of my sons, now 12 and seven, one day being able to write “fluent Brazilian Portuguese” on their CVs, I feel a little smug.’

Helen Joyce, São Paulo Bureau Chief, *The Economist*



PORTUGUESE IN THE UK

Portuguese is the eighth most commonly spoken language among pupils in England having English as an additional language. Figures from 2011 show that 22,660 schoolchildren were speakers of Portuguese.¹³⁰ Portuguese is less common amongst pupils in Scotland.¹³¹

Although the number of young people studying Portuguese to A-level is very small (just 312 in 2012), this represents an 80 per cent increase in five years.¹³²

The number of pupils studying Portuguese at GCSE is also small (1,721 in 2012) and has increased only very slightly in the past five years.¹³³

There are no equivalent examinations for Portuguese in the Scottish education system.

Portuguese is not widely taught at degree level with only about 20 universities across the UK offering degree courses.¹³⁴

Less than one per cent of the UK’s adult population report that they speak Portuguese well enough to hold a conversation.¹³⁵

FURTHER INFORMATION

Instituto Camoes at various universities in the UK:
www.instituto-camoes.pt

Portuguese Embassy – education department:
<http://portuguese-embassy.co.uk/en/education.html>

Brazilian Embassy – Brazilian cultural contacts in the UK:
www.brazil.org.uk/brazilintheuk

English words derived or adopted from Portuguese include:

**BANANA COBRA
CASHEW ZEBRA
MONSOON TEAK**

122. Top ten internet languages – Internet World Stats: www.internetworldstats.com/stats7.htm

123. Office of National Statistics (August 2013) ‘UK Trade, June 2013’ in Statistical Bulletin; available at www.ons.gov.uk/ons/dcp171778_318161.pdf

124. *ibid.*

125. HM Government (2013) *International Education: Global Growth and Prosperity*.

126. *ibid.*

127. British Academy (forthcoming) *Lost for Words. The Need for Languages in UK Diplomacy and Security*.

128. House of Commons library (2013) *Tourism. Standard Note SN/EP/6022*.

129. English Proficiency Index: www.ef.co.uk/epi

130. National Association for Language Development in the Curriculum (2011) *School Census January 2011 Language Data. Number of Compulsory School Age Pupils in Primary, Secondary and Special Schools by Declared First Language*: www.naldic.org.uk/research-and-information/eal-statistics/lang

131. National Statistics (2011) *Pupils in Scotland 2011. Main Home Language*.

132. Teresa Tinsley and Kathryn Board (2012) *Language Learning in Primary and Secondary Schools in England – Languages Trends Survey*, CfBT Education Trust.

133. *ibid.*

134. British Academy/Teresa Tinsley (2013) *The State of the Nation. Demand and Supply of Language Skills in the UK*, British Academy: www.britac.ac.uk/policy/State_of_the_Nation_2013.cfm

135. YouGov (October 2013) (available on request from the British Council).

RUSSIAN РУССКИЙ

Russian is a Slavic language. It ranks eighth in the world with 140–150 million native speakers, and is also spoken as a second language by over 120 million people in Russia and the neighbouring countries of Central Asia.

Russian has official status in Russia as well as in Belarus, Kazakhstan and Kyrgyzstan. It is written in the Cyrillic alphabet. Other languages using modified forms of the Cyrillic script are Bulgarian, Macedonian, Serbian, Ukrainian and Belorussian.

Russian is an official language of the United Nations, International Criminal Court, Organisation for Security and Cooperation in Europe and the Shanghai Cooperation Organisation.

In terms of internet usage, Russian is the eighth most commonly used language.¹³⁶

BUSINESS BENEFITS

Russia is the UK's 12th largest goods export market worth £5.6 billion in 2012. It is also the UK's 14th most important source of imports, with imported goods from Russia valued at £8.45 billion in 2012, resulting in a substantial trade deficit.¹³⁷

As one of the BRIC countries, Russia has been identified as one of the four major world powers whose influence is growing fast. It is already the world's sixth largest economy and is projected to overtake Germany by 2030.¹³⁸ The Department for Business, Innovation and Skills has commented, however, that *the business climate makes the country a difficult market for exporters*.¹³⁹ In spite of the difficulties, British firms have invested heavily in Russia and about 600 UK companies were operating in Russia in 2009. The fact that Russia became a member of the World Trade Organisation in 2012 will make future trade and investment in Russia easier, as will their membership of the Organisation for Economic Co-operation and Development.

INTERNATIONAL CONNECTIONS

The increase in ethnic and regional conflicts in the post-Soviet era, together with Russia's role as a global economic power, has meant that Russian continues to be an important language for diplomacy and security.¹⁴⁰

The UK's international education strategy identifies Russia as a key target market for recruiting international students. Formal discussions are under way over the mutual recognition of qualifications but it is not expected that this will be achieved for some time.¹⁴¹

The English Proficiency Index rates Russia as a country with low proficiency in English.¹⁴²

136. Top ten internet languages – Internet World Stats: www.internetworldstats.com/stats7.htm

137. Office of National Statistics (August 2013) 'UK Trade, June 2013' in Statistical Bulletin; available at www.ons.gov.uk/ons/dcp171778_318161.pdf

138. Price Waterhouse Cooper (2013) *The World in 2050. The BRICs and Beyond*.

139. Department for Business, Innovation and Skills (2011) *Trade and Investment for Growth*.

140. British Academy (forthcoming) *Lost for words. The Need for Languages in UK Diplomacy and Security*.

141. HM Government (2013) *International Education: Global Growth and Prosperity*.

142. English Proficiency Index: www.ef.co.uk/epi

143. National Statistics (2011) *Pupils in Scotland 2011, Main Home Language?*

144. John Eversley et al. (2010) *Language Capital. Mapping the Languages of London's Schoolchildren*, CLT/Institute of Education.

145. Teresa Tinsley and Kathryn Board (2012) 'Language Learning in Primary and Secondary Schools in England – Languages Trends Survey', CfBT Education Trust.

146. Scottish Qualifications Authority (2013) National Course and Awards Result Statistics 2013.

147. *ibid.*

148. British Academy/Teresa Tinsley (forthcoming) *The State of the Nation. Demand and Supply of Language Skills in the UK*: www.britac.ac.uk/policy/State_of_the_Nation_2013.cfm

149. YouGov (October 2013) (available on request from the British Council).

English words derived or adopted from Russian include:

VODKA TUNDRA
TSAR GLASNOST
APPARATCHIK

RUSSIAN IN THE UK

Although Russian is not in the top 16 languages spoken by English schoolchildren with English as an additional language, it ranks eighth in the Scottish pupil census (2011)¹⁴³ and there is evidence that the number of Russian speakers in the UK has increased over the past decade. Figures from London, for example, show that the number of schoolchildren speaking Russian has more than trebled in the decade 1998–2008.¹⁴⁴

In 2012 there were over 1,000 entries for A-level Russian, making Russian one of the few languages which has seen

an increase in numbers with entries for A-level having almost doubled in ten years. It is likely that much of this increase is due to Russian native speakers or speakers of other Slavic languages attending UK state and independent schools. This makes Russian the fifth most popular foreign language at A-level.¹⁴⁵ Entry figures for Russian in the Scottish examination system are very small, with 36 students sitting the Higher in 2013.¹⁴⁶

There were nearly 2,000 entries for Russian GCSE in 2012. This also shows a steady increase over ten years, again probably due to the presence of pupils who already know some Russian.

However, these figures make Russian the ninth most popular foreign language at GCSE.¹⁴⁷

Russian can be studied to degree level in around 20 universities in England and Scotland.¹⁴⁸

Only one per cent of the UK's adult population report that they speak Russian well enough to hold a conversation.¹⁴⁹

FURTHER INFORMATION

Ruskiy Mir Foundation:
www.ruskiymir.ru/ruskiymir/en



‘Deciding to learn Russian was probably the best decision I ever made. Not only did it unlock the door to a wonderful culture (reading Dostoevsky, Chekhov and Pushkin in the original Russian still gives me a buzz); it also meant I got the chance to study there for two years and see a side of Russian life which – because of the Cold War– was almost unknown to foreigners. Being able to speak Russian helped launch me into my first job at the BBC and later into a career as a foreign correspondent, reporting first hand on the collapse of the Soviet Union, covering Washington politics, and travelling the globe to report from war zones and diplomatic summits, refugee camps and presidential palaces.’

Bridget Kendall, Journalist

SPANISH ESPAÑOL

Spanish is a Romance language. It is the second most widely spoken language in the world with approximately 400 million native speakers.

Spanish has official status in 21 countries: Andorra, Argentina, Bolivia, Chile, Colombia, Costa Rica, Cuba, Dominican Republic, Ecuador, Equatorial Guinea, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Uruguay, Venezuela, Spain and is also an official language of Puerto Rico.

Mexico has over 20 per cent of all first language Spanish speakers, while the USA, with 30–40 million native speakers of Spanish, is the country with the largest Spanish speaking minority.

Spanish is closely linked to other Romance languages: such as French, Italian and Portuguese. The standard language of Spain differs from South American varieties of the language but they are mutually intelligible.

Spanish is an official language of the United Nations, International Criminal Court, World Trade Organisation, International Labour Organisation, International Telecommunications Union, Latin Union, African Union, Central American Common Market, European Union, Mercosur, North American Free Trade Agreement, Organisation for Security and Cooperation in Europe, Organisation of American States and the Union of South American Nations.

With eight per cent of usage, Spanish is the third biggest language of the internet.¹⁵⁰ Along with Africa and the

Middle East, Latin America is one of the fastest growing regions in terms of internet use.¹⁵¹

BUSINESS BENEFITS

Spain is the UK's eighth largest goods export market, valued at £8.5 billion in 2012. It is the UK's tenth largest source of goods imports valued at £11.5 billion for the same period.¹⁵²

With a combined population of over 221 million people, Argentina, Chile, Colombia and Mexico have all been identified by the Confederation of British Industry as upcoming economies.¹⁵³ Management consultancy PricewaterhouseCooper projects that the Mexican economy will overtake that of the UK by 2030.¹⁵⁴ The government recognises that trade relations with the economies of Latin and Central America are currently under-developed.¹⁵⁵

Mexico is one of the most open trading nations in the world, with an extensive network of bilateral trade agreements. The CBI has pointed to Mexico's disproportionately low share of the UK export market and highlighted the opportunities there for British firms, particularly if they can operate in Spanish:

Our perceived ambivalence towards foreign languages is seen increasingly as a limitation in a global marketplace

*where local knowledge and customs count. Mexico, for example, with a population of 112 million and a growing middle class represents a real opportunity for UK firms. Although many Mexicans speak English, an exporter who can speak Spanish will find it much easier to develop contacts and secure business.*¹⁵⁶

INTERNATIONAL CONNECTIONS

The British Academy publication, *Lost for Words*, reports that the Foreign and Commonwealth Office (FCO) is creating additional posts for speakers of particular languages in a number of regions including Latin America to reflect the rise of emerging powers and their economies. The FCO plans to increase the number of British diplomats speaking Spanish (Latin American) and Portuguese by 20 per cent.

In 2012 Spain was the most popular destination for people from the UK with more than 11 million visitors. Tourists from Spain to the UK are the fourth largest non-English speaking group after visitors from France, Germany and the Netherlands.¹⁵⁷

Mexico has been identified as a key target market for incoming international students and as a priority country for international education.¹⁵⁸ The government is currently working with the education sector to develop proposals for a centre of excellence



'I did French and Spanish at university because I wanted to be a UN interpreter and these were two of the official languages. My career plans changed but Spanish has always opened doors for me. After the coup in Chile in 1973, I helped to set up the Chile Solidarity Campaign and was Mrs Allende's interpreter when she came to London. Much more recently, I managed to convert my Castellano into Peruvian Spanish and spent some time in Lima for VSO as a parliamentary volunteer, working with NGOs on violence against women, and with British companies in Peru on CSR.'

Baroness Coussins, Vice-President of the Chartered Institute of Linguists and Chair of the All-Party Parliamentary Group on Modern Languages

providing initial teacher training and in-service professional development to be based within a leading university in the region.

SPANISH IN THE UK

According to 2011 figures from the Department for Education, there were more than 13,000 speakers of Spanish in English schools, making Spanish the 14th most commonly spoken language by schoolchildren with English as an additional language.¹⁵⁹ In Scotland, Spanish ranks as tenth in importance.¹⁶⁰ There are, however, indications that these numbers are growing. According to Eversley et al., the number of Spanish-speaking schoolchildren in London grew by 57 per cent in the period 1998 to 2008.¹⁶¹

Spanish is the second most popular language at GCSE with more than 66,000 entries in 2012. In Scotland the number of entries for Spanish in all school level examinations has continued to grow.¹⁶²

Spanish is also now the second most popular language at A-level after French, having overtaken German in 2005. With more than 7,600 entries in 2013, it is the only major language to buck the trend of year on year decline.¹⁶³

Spanish is offered at degree level by more than 70 universities across the whole of the UK and has seen fewer departmental closures than other languages.¹⁶⁴

Only four per cent of the UK's adult population report that they speak Spanish well enough to hold a conversation.¹⁶⁵

FURTHER INFORMATION:

Instituto Cervantes:
<http://londres.cervantes.es/en/default.shtm>

English words derived or adopted from Spanish include:

**CARGO PATIO
JUNTA PLAZA
TORNADO**

150. Top ten internet languages – Internet World Stats: www.internetworldstats.com/stats7.htm
 151. British Academy (forthcoming) *Lost for words. The Need for Languages in UK Diplomacy and Security*.
 152. Office of National Statistics (August 2013) 'UK Trade, June 2013' in Statistical Bulletin; available at www.ons.gov.uk/ons/dcp171778_318161.pdf
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 157. House of Commons library (2013) *Tourism*. Standard Note SN/EP/6022.
 158. HM Government (2013) *International Education: Global Growth and Prosperity*.
 159. National Association for Language Development in the Curriculum (2011) *School Census January 2011 Language Data. Number of Compulsory School Age Pupils in Primary, Secondary and Special Schools by Declared First Language*: www.naldic.org.uk/research-and-information/eal-statistics/lang
 160. National Statistics (2011) *Pupils in Scotland 2011. Main Home Languages*.
 161. John Eversley et al. (2010) *Language Capital. Mapping the Languages of London's Schoolchildren*, CLT/Institute of Education.
 162. Teresa Tinsley and Kathryn Board (2012) 'Language Learning in Primary and Secondary Schools in England – Languages Trends Survey', CfBT Education Trust. Scottish Qualifications Authority. Annual Statistical Report tables.
 163. Joint Council for Qualifications (2013) *A, AS and AEA Results, Summer 2013*.
 164. British Academy/Teresa Tinsley (2013) *The State of the Nation. Demand and Supply of Language Skills in the UK*, British Academy: www.britac.ac.uk/policy/State_of_the_Nation_2013.cfm
 165. YouGov (October 2013) (available on request from the British Council).

TURKISH TÜRKÇE

Turkish is a Turkic language and has an estimated 50–60 million native speakers. It is the official language of Turkey and also an official language in the Republic of Cyprus.

Turkish belongs to a homogenous group of about 20 languages, which are for the most part mutually intelligible.¹⁶⁶ The group includes Azerbaijani, Turkmen, Uzbek, Kazakh and Kirgiz.

BUSINESS BENEFITS

Turkey currently ranks 21st in terms of the UK's most important export market in goods, with exports worth £3.7 billion in 2012. In the same year UK imports from Turkey totalled £5.8 billion making Turkey the UK's 19th most important source of goods imports.¹⁶⁷

Turkey has been identified as having the potential to join the group of the world's largest economies in the course of the 21st century.¹⁶⁸ According to the Department for Business, Innovation and Skills, the government aims to double its trade with Turkey and to support its accession to the EU.¹⁶⁹

UK Trade and Investment also supports a number of formal ministerial bilateral economic and trade dialogues with key emerging and high growth markets, including Turkey. The aim of these dialogues, which also involve businesses from both countries, is to strengthen the economic, industrial and commercial ties between the UK and the markets in question and to look at the barriers to trade between them.

INTERNATIONAL CONNECTIONS

In the British Academy's *Lost for Words* report, Turkish is mentioned as one of the languages required for diplomacy and security.¹⁷⁰

Turkey has been identified as an important target market for incoming international students and a priority country for international education.

Turkey features in the top ten preferred destinations by UK tourists, and is the seventh most popular non-English

speaking destination. Interestingly, those travelling to Turkey tend to spend longer there than those who visit European countries closer to home.¹⁷¹

The English Proficiency Index ranked Turkey as a country with low proficiency in English.¹⁷²

TURKISH IN THE UK

With nearly 20,000 speakers in 2011,¹⁷³ Turkish is the 11th most frequently spoken language by English schoolchildren with English as an additional language. Turkish does not appear in Scottish school census records. However, in London it ranks as the seventh most frequently spoken additional language among schoolchildren, with numbers rising by about seven per cent over the last decade.¹⁷⁴

At GCSE there were 1,379 entries for Turkish in 2012, showing only a very slight increase from 1,189 in 2003.¹⁷⁵

166. K Katzner (1986) *Languages of the World*, The Guernsey Press.

167. Office of National Statistics (August 2013) 'UK Trade, June 2013' in Statistical Bulletin; available at www.ons.gov.uk/ons/dcp171778_318161.pdf

168. PricewaterhouseCooper (2013) *The World in 2050. The BRICs and Beyond*.

169. Department for Business, Innovation and Skills (2011) *Trade and Investment for Growth*.

170. British Academy (forthcoming) *Lost for words. The Need for Languages in UK Diplomacy and Security*.

171. House of Commons library (2013) *Tourism. Standard Note SN/EP/6022*.

172. English Proficiency Index: www.ef.co.uk/epi

173. National Association for Language Development in the Curriculum (2011) *School Census January 2011 Language Data. Number of Compulsory School Age Pupils in Primary, Secondary and Special Schools by Declared First Language*: www.naldic.org.uk/research-and-information/eal-statistics/lang

174. John Eversley et al. (2010) *Language Capital. Mapping the Languages of London's Schoolchildren*, CILT/Institute of Education.

175. Teresa Tinsley and Kathryn Board (2012) 'Language Learning in Primary and Secondary Schools in England – Languages Trends Survey', CfBT Education Trust.

176. Joint Council for Qualifications (2013) *A, AS and AEA Results, Summer 2013*.

177. British Academy/Teresa Tinsley (forthcoming) *The State of the Nation. Demand and Supply of Language Skills in the UK*: www.britac.ac.uk/policy/State_of_the_Nation_2013.cfm

178. YouGov (October 2013) (available on request from the British Council).

English words derived or adopted from Turkish include:

BALACLAVA YURT
YOGHURT KIOSK
BERGAMOT

Although the number of entries at A-level for Turkish is small, the numbers have grown from 276 entries ten years ago to 419 in 2013.¹⁷⁶

Turkish can be studied to degree level at four universities in England, but not in the other UK nations.¹⁷⁷ There are no Scottish equivalent examinations for Turkish.

Less than one per cent of the UK's adult population report that they speak Turkish well enough to hold a conversation.¹⁷⁸

FURTHER INFORMATION

Yunus Emre Turkish Cultural Centre:
<http://yee.org.tr/ingiltere-londra/en/homepage>



‘Growing up in Istanbul in the 1960s and 1970s, we were passionately interested in western culture. But western culture was blind and deaf to us. What I wanted to do most with my Turkish was act as a conduit to destroy that one-way mirror and initiate a two-way conversation to enrich us all.’

Maureen Freely

Maureen Freely was born in the US, grew up in Turkey and has lived in the UK for most of her adult life. She is an author, lecturer at Warwick University and translator, particularly well-known for her translations of Orhan Pamuk's books into English.

APPENDIX

MATRIX OF LANGUAGE INDICATORS WEIGHTINGS AND SCORES

LANGUAGES	TOTAL	INDICATOR 1: CURRENT UK EXPORT TRADE	INDICATOR 2: THE LANGUAGE NEEDS OF UK BUSINESS	INDICATOR 3: UK GOVERNMENT TRADE PRIORITIES	INDICATOR 4: EMERGING HIGH GROWTH MARKETS
Spanish	76	6	8	5	4
Arabic	54	2	5	5	3
French	47	8	10	5	
Mandarin Chinese	45.5	7	6		2
German	43.5	10	9	5	
Portuguese	41		2	5	3
Italian	22.5	5			
Russian	19	3	3		3
Turkish	19			5	1
Japanese	17	1	1		
Dutch	14	9		5	
Polish	15.5		7		1
Hindi/Indian languages	12			5	2
Korean	12			5	1
Farsi (Persian)	10				1
Swedish	9	4		5	
Indonesian	7				1
South African languages	6			5	1
Cantonese	5		4		1
Pashto	4				
Vietnamese	3.5				1
Greek	5				
Urdu	1.5				1
Akan/Ghanaian languages	1				1
Bengali	1				1
Czech	1				1
Kazakh	1				1
Malaysian	1				1
Tagalog	1				1
Thai	1				1
Ukrainian	1				1
Yoruba/Nigerian languages	1				1
Total	498	55	55	55	35

As has been made clear in the body of this report, the aim is not to provide a definitive answer to the research question, but rather to stimulate debate and more strategic thinking. The choice of indicators and the weight given to each is inevitably somewhat subjective. Others, from different perspectives and at different

points in time, may regard alternative indicators as more appropriate. However, for the purposes of the transparency of this report, the following explanatory notes are provided.

We have worked with a total of 498 points, of which 200 relate to pure

economic factors (indicators 1–4), 198 relate to diplomatic and cultural factors (indicators 5–8), and 100 relate to qualifying indicators (9–10).

The evidence base and the rationale for the allocation of points for each indicator is given below.

INDICATOR	EVIDENCE BASE	SCORING
1.	Trade Figures for 2012 published by Office for National Statistics. ¹⁷⁹	The languages of the top ten non-English speaking export markets have been awarded a total of 55 points, starting with 10 for the most important (German), 9 for the next (Dutch), and so on.
2.	Languages rated as useful according to the CBI Education and Skills survey 2013. ¹⁸⁰	A total of 55 points have been awarded, starting with 10 for language regarded as most useful (French), 9 for the next most useful (German) etc.
3.	Languages of countries targeted in the Government's Trade and Investment for Growth report (2011). ¹⁸¹	A total of 55 points have been awarded, without any rank order (as none exists in the document). The languages of countries mentioned have each been allocated 5 points.
4.	Languages of countries to be targeted to improve the UK's export performance, according to the CBI/Ernst & Young report <i>Winning Overseas</i> (2011). ¹⁸²	A total of 35 points have been shared among the languages involved, as follows. Each language receives 1 point per country mentioned in the report (e.g. Spanish receives 4 points, one each for Argentina, Chile, Colombia and Mexico) except the BRIC countries (Brazil, Russia, India and China), who have been awarded 3 points to reflect their size and special economic importance. Of these, in the case of China, 1 point is given for Cantonese and 2 for Mandarin Chinese. Only 2 points have been given to India, to reflect the status of English.
5.	Languages most needed in UK diplomacy and security, as derived by us from the British Academy's <i>Lost for Words</i> report. ¹⁸³	Languages were placed in order according to the number of times they were mentioned in the report. A total of 55 points was shared among the top ten languages mentioned. Arabic and Mandarin Chinese, which shared top place, were given 9.5 points each Spanish, Portuguese and Persian, which shared third place, were given 7 points each. Korean, Pashto and Turkish were given 4 points each and half a point was given to a range of other languages mentioned in the report.
6.	Languages in which there is grass roots public interest in learning, as measured by the existence of part-time evening classes. ¹⁸⁴	Languages were put in order according to the number of courses on offer and the top ten were allocated points according to their place in the table. French and Italian tied in second place (after Spanish). Courses in Mandarin Chinese, Arabic, Polish, Portuguese and Russian were found in similar numbers, so each of these languages was allocated 3 points.
7.	Languages associated with countries that receive the most visitors from the UK. Figures from the International Passenger survey 2012. ¹⁸⁵	A total of 52 points was shared among the top eight languages associated with the countries involved, with the top scoring language being Spanish. Only eight languages were identified because of the presence of the USA and Ireland among the top ten countries.
8.	Languages of countries targeted in the government's International Education Strategy (2013). ¹⁸⁶	A total of 36 points was shared among the nine countries mentioned in the report, and these points were then allocated to the languages associated with these countries.
9.	Languages spoken in countries with lower levels of proficiency in English, as measured by the English Proficiency Index. ¹⁸⁷	A total of 46 points were shared between countries which had already been mentioned in connection with other indicators in this research. Countries with only a moderate level of proficiency in English were allocated 1 point, those with low proficiency were allocated 2 points, and those with very low proficiency 3 points. These points were then allocated to the languages associated with these countries. (Switzerland's single point was shared between French and German.)
10.	Presence of languages on the internet as measured by Internet World Stats. ¹⁸⁸	The nine languages other than English mentioned in this source were put into order according to their relative presence on the internet, and a total of 54 points shared between them, starting with ten points for Mandarin Chinese, the most widely used language after English.

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179. Office of National Statistics (August 2013) 'UK Trade, June 2013' in Statistical Bulletin; available at www.ons.gov.uk/ons/dcp171778_318161.pdf
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185. House of Commons library (2013) *Tourism. Standard Note SN/EP/6022*.
186. HM Government (2013) *International Education: Global Growth and Prosperity*.
187. English Proficiency Index: www.ef.co.uk/epi
188. Top ten internet languages – World Internet Stats: www.internetworldstats.com/stats7.htm

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