BRITISH COUNCIL

LANGUAGES FOR THE FUTURE

The foreign languages the United Kingdom needs to become a truly global nation

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This report is the 2017 edition of Languages for the Future.
It updates the British Council's 2013 edition.

This report was commissioned by the British Council and prepared by Teresa Tinsley and Kathryn Board of Alcantara Communications.

Teresa Tinsley is a linguist with over 30 years' experience in national organisations devoted to languages education. At CILT, the National Centre for Languages, she led the organisation's information, research and publications activities. She established CILT's 'Language Trends' series of reports and produced statistics and policy developments published as Languages Yearbooks 1995–2007. She was involved in several European research projects on multilingualism and was a member of the European Commission's 'Languages in Education and Training' group. Since founding Alcantara Communications, she has conducted policy research on languages issues for clients including the British Academy and CfBT Education Trust.

Kathryn Board was Chief Executive of CILT, the National Centre for Languages, from 2008 and has worked with specialists and a wide range of educational institutions to provide advice on educational policy as well as on initiatives aimed at increasing language learning across the UK. Before joining CILT, she spent 30 years working for the British Council in a number of international and management roles. Now partially retired, she continues to work on research projects where she can bring in her expertise.

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

The British Council is the UK's international organisation for cultural relations and educational opportunities. We create friendly knowledge and understanding between the people of the UK and other countries. We do this by making a positive contribution to the UK and the countries we work with – changing lives by creating opportunities, building connections and engendering trust.

We work with over 100 countries across the world in the fields of arts and culture, English language, education and civil society. Last year we reached over 65 million people directly and 731 million people overall including online, broadcasts and publications. Founded in 1934, we are a UK charity governed by Royal Charter and a UK public body.

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LANGUAGES FOR THE FUTURE

未来的语言

ЯЗЫКИ ДЛЯ БУДУЩЕГО

TALEN VOOR DE TOEKOMST

لغات للمستقبل

LINGUE PER IL FUTURO

SPRACHEN FÜR DIE ZUKUNFT

IDIOMAS PARA EL FUTURO

LANGUES POUR LE FUTUR

LÍNGUAS PARA O FUTURO

FOREWORD

The UK's future relationship with the European Union is dominating current thinking. However, this is not the only thing that matters for the country. The UK could get the best Brexit deal possible, but this will matter little if the fundamentals here at home aren't up to scratch, leaving us unable to take advantage of the possibilities available across the world.

Crucially, that means improving the skills base of the workforce of tomorrow, so that the next generation is truly capable of leading the way in making the UK the best place to do business, both at home and around the world.

As the United Kingdom looks to deepen and expand its trading ties with other nations, businesses must look to be more competitive. To increase productivity, the UK needs a workforce with the right set of technical knowledge and skills base in order to flourish. This includes the ability to work in a multilingual and culturally diverse marketplace, enabling firms to foster connections across borders.

However, our foreign language capacity is not yet where it needs to be. Progress in the uptake of languages in schools has lagged, and this means young people are entering the workforce without sufficient language skills.

At the British Chambers of Commerce we have long called for foreign language teaching to be made compulsory in schools between the ages of seven and 16 – our own research has shown that few businesspeople are confident enough to conduct deals in the buyers' language, while non-exporters see a lack of proficiency in another language as a barrier to do so.

This timely report highlights important questions, and considers which languages will be most important for our future prosperity and influence. As a world authority in English language teaching, it speaks volumes that the British Council is also championing the need to move beyond relying on English as a lingua franca.

Businesses can and should do more to emphasise the value of foreign language skills. Government, education providers, and individuals themselves also have important roles to play. We must work together to ensure that the UK can effectively address its language deficit, which will help the UK to become a globally connected and open trading nation, and ensure our future prosperity.

Dr Adam Marshall
Director General
British Chambers of Commerce

EXECUTIVE SUMMARY

The UK is at a turning point. It is preparing to leave the European Union (EU), a process which will fundamentally change not only its relationship with the countries of the EU, but also with the rest of the world.

Brexit has given urgency to the UK's quest to be a major international trading partner beyond Europe, while at the same time highlighting the importance of our continuing interconnectedness with our European neighbours. Among the skills and capabilities the UK will need, an understanding of other cultures and languages will continue to be important for successful international relationships at all levels. Both within and beyond Europe, we will need to reach out beyond English, not only to maintain and improve our economic position but to build trust, deepen international influence and cultural relationships, and to keep our country safe. But which languages do we need most?

This report looks at the linguistic dimension of the far-reaching changes which are under way and at the outlook for the supply and demand for language competence in the years ahead. It updates the British Council's 2013 report *Languages for the future*, which provided the first systematic analysis of the UK's language needs, looking at a variety of economic, geopolitical, cultural and educational indicators, and scoring different languages against these. It identifies the languages which will be of crucial importance for the UK's future prosperity, security and influence in the world.

The indicators used take into account both economic and non-market factors:

- Current UK exports
- The language needs of UK business
- Future trade priorities
- Emerging high growth markets
- Diplomatic and security priorities
- The public's language interests
- Outward and inward tourism
- International educational engagement
- Levels of English proficiency in other countries
- The prevalence of different languages on the internet

The review draws on sources published after the June 2016 referendum and uses a similar methodology and evidence base to the 2013 report. It has produced a list of the ten most important languages for the UK as a whole. The ranking takes into account the extent to which people in other countries are competent in English, and notes that there has not been universal progress in this regard since 2013.

As in 2013, the same five languages: Spanish, Mandarin, French, Arabic and German, make it to the top of the table. These five languages appear consistently as the most important, some way ahead of the remaining five. In the second half of the table are Italian, Dutch, Portuguese, Japanese and Russian. Both Russian and Portuguese have declined in importance since our earlier analysis, and Turkish has dropped out of the top ten to be replaced by Dutch. These movements are caused by changes in the economic and political circumstances in Russia, Turkey and Brazil and are not related to Brexit.

Rank	Language
1	Spanish
2	Mandarin
3	French
4	Arabic
5	German
6	Italian
7	Dutch
8	Portuguese
9	Japanese
10	Russian

Other languages which scored highly and may well grow in importance in future include Polish, Malay, Hindi and other Indian languages.

With only just over one in three Britons reporting that they are able to hold a conversation in another language, the UK's language capability remains a concern. Language provision in many schools and universities looks increasingly vulnerable, opportunities to learn languages in vocational pathways are very scarce, and some of the languages we are likely to need most in future have only a marginal place in our education systems. The UK's already limited language capability could be further eroded by increased difficulties in recruiting native-speaker linguists from abroad once we leave the EU.

The four nations of the UK have approached policy on language education in different ways, which reflect their different linguistic circumstances, and they will continue to do so. But all should recognise that the UK's language deficit remains a threat to our overall international competitiveness, influence and standing in the world, as well as to our citizens' ability to play a meaningful role in the global economy and in an increasingly networked world. We have now reached a critical juncture where investment in upgrading the UK's language skills, which give unparalleled access to cultural knowledge and understanding, will pay important dividends. This task will involve individuals, businesses and employers as well as the four UK governments. We recommend:

- Now is the moment to initiate a bold new policy to improve foreign language learning for a transformed 'global Britain'. Support for such a policy must be cross-government and cross-party with a focus on sustained improvement in language capacity over the medium to long term.
- Language skills form an integral part of the strategic review of skills that the UK will need post-Brexit, and should take into account any potential loss of linguistic capacity as a result of reduced immigration from Europe and elsewhere. It is crucial that such a review represents the interests of public, private and third sector organisations and that employers and language providers work together to ensure business and organisational needs for language capacity are met.
- Government and business organisations provide better advice to companies on using and managing language skills, particularly in relation to achieving export-led growth. The linguistic talent present in the UK's diaspora and minority communities should be fully utilised and developed.
- Governments of the four nations of the UK prioritise the teaching of the top five languages identified in this report as consistently important, and take a strategic approach to building capacity in Arabic and Mandarin Chinese alongside French, Spanish and German. There are opportunities to draw on successful practice from the Mandarin Excellence Programme in England and Scotland's China strategy.
- Schools prioritise language learning alongside science, technology, engineering and maths (STEM) subjects and give pupils every opportunity to develop an understanding and appreciation of other languages and cultures.
- Education departments and regulators work together to set and ensure adherence to minimum time requirements for language teaching at primary and secondary level. In Northern Ireland and Wales, they should seek to make language learning statutory in primary schools, as it is in England and Scotland.
- Education providers consider the country's future need for international capacity post-Brexit, and specialist expertise in languages and cultures in our university sector is given strategic protection.
- Further and higher education providers develop, and incentivise take-up of, the offer of languages as additional modules or integrated units within vocational and degree courses.
- Individuals (as parents, young people and adults) consider the need for, and benefits of, language learning, and take responsibility for their own learning using the formal education system, private providers, or the plethora of free language teaching resources.
- UK government negotiators protect and prioritise education exchange programmes in EU exit negotiations and guarantee their continuation ideally via the UK retaining full membership of the Erasmus+ programme or if this is not possible then seeking to replicate its benefits through at least equivalent bilateral arrangements.
- The UK government and the devolved governments in Scotland, Wales and Northern Ireland nominate and appoint a Cabinet-level language champion.

INTRODUCTION

As the UK embarks on a new era of co-operation with Europe, and with the rest of the world, the extent to which the country can realise the vision of a truly global UK in the long term will depend on our ability to succeed in a competitive international environment, and to understand and connect with people across the world.

International awareness and capability are increasingly important not only for the UK's success on the global stage but for the success of businesses, organisations and individuals. The ability to function in more than one language is increasingly being seen not just as enabling a basic transaction but as a crucial component of a set of skills, attributes and knowledge required for success in the world today.[1] Languages deepen cultural understanding and open doors to international experience and opportunity for individuals, businesses and government. Business leaders and researchers have long made the case that, however important our national language has become as an international lingua franca, success in international trade requires more than just English, and that the ability to build relationships and understand other cultures are essential elements of success. Research for UK Trade & Investment showed that deficient language skills and the presumption that international business partners will speak English is costing the UK economy about 3.5 per cent of GDP.[2] Our security services, our diplomatic corps and tourist business all depend on language skills beyond English. There is no doubt that language skills will continue to be important for successful international relationships at all levels. But which languages does the UK need most?

In 2013, the British Council undertook the first systematic analysis of 'the languages the UK needs most and why', using both economic and non-economic criteria, and drawing on a range of sources designed to shed light on which languages were most likely to support the needs and aspirations of the UK and its four nations over the next 20 years or so.

All languages are, of course, equally valuable from a linguistic point of view, and the knowledge of any language in addition to the mother tongue expands both cultural understanding and communicative resources. However, it remains the case that those intending to invest time and resources in language learning – whether politicians, taxpayers, parents or learners – seek guidance on where that effort might most effectively be focused.

'If the UK is to be successful as a globally open trading nation, it will need more of its people to be able to communicate adequately in those new markets.'

CBI/Pearson Education and Skills survey 2017[3]

1. British Council (2013) *A World of Experience*. Available at: https://www.britishcouncil.org/organisation/policy-insight-research/research/world-experience
2. James Foreman-Peck and Yi Wang (2014) *The Costs to the UK of Language Deficiencies as a Barrier to UK Engagement in Exporting: A Report to UK Trade & Industry.* Cardiff Business School.
3. CBI/Pearson (2017) *Helping the UK thrive,* Education and Skills Survey 2017, page. 34. Available at: www.cbi.org.uk/insight-and-analysis/helping-the-uk-thrive/

Departure from the EU will mean a greater emphasis on bilateral international relations, both with our current closest partners and with those countries where we hope to deepen our relationship. This may reduce the extent to which we can rely on English as a lingua franca, as in a bilateral relationship the languages of both countries need to be tools for communication and diplomacy. Brexit therefore raises some important questions about our skills base in languages and the ways in which this will support the nation's needs and ambitions in the years to come:

- Will there be more or less need for the languages most commonly taught in UK schools – French, Spanish and German?
- Will there be limitations on recruitment from the EU which could lead to a shortage of language skills and an increased need for more UK nationals able to work in other languages besides English?
- As we seek to forge new and deeper relationships with other countries worldwide, will there be demand for a wider range of world languages?

And crucially:

- Will our future international partnerships be determined by the extent to which other countries are willing and able to use English as a medium of communication?

This report looks at the linguistic dimension of the far-reaching changes which are under way and at the outlook for the supply and demand for language competence for the years ahead. It is based on a thorough review of the research carried out in 2013, using a similar methodology and evidence base, and draws on fresh data published after the June 2016 referendum. We recognise the uncertainties of international politics and the speed with which priorities change. In 2017, the international landscape has become, if anything, even more unpredictable, and as we go to press many aspects of the UK's future relationship with the countries of the EU are still to be determined. However, no area of endeavour can use unpredictability as a pretext for failing to take a strategic view in order to prioritise and invest in preparation for the future. The time and investment needed to learn a language demand at least a medium-term perspective. Our aim is to provide a clear-headed and systematic review of our likely language needs, and to put forward material for an informed discussion of policy and provision for language education in the medium to long term.

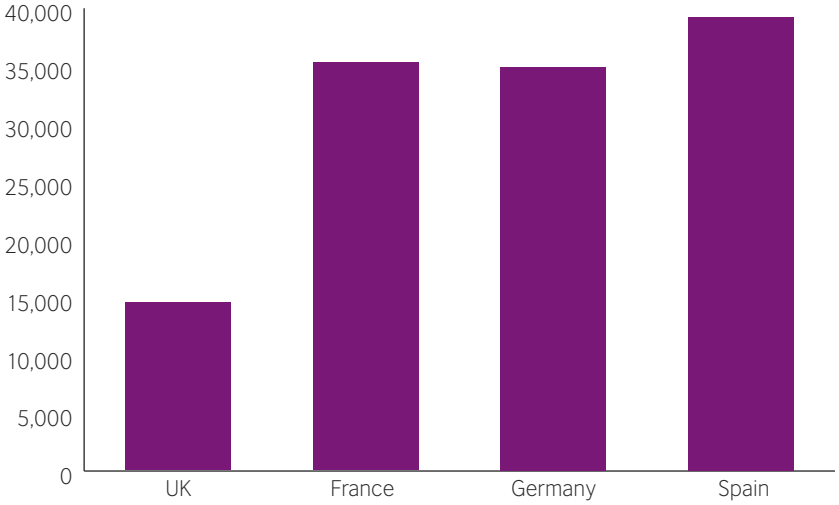
THE UK'S LANGUAGE CHALLENGE

Leaving the EU will imply major changes in the UK's labour market. Our ability to succeed in a competitive global environment will be even more dependent on having a workforce which is fit for purpose.

Within this context, language competence is far more than just another tool in the box, but rather a prerequisite and a facilitator for the development of a wide spectrum of other vital skills and attributes. An in-depth study drawing on the views of more than 600 employers found that UK nationals without language skills lose out not simply because they are limited in their ability to communicate, but as a knock-on effect of having restricted access to overseas work experience, a lack of international business sense, a failure to appreciate that other cultures have different ways of doing things and a misunderstanding of the global importance of British culture.[4]

Lack of language skills has been identified as the major reason young people do not take up opportunities to gain international experience.[5] This particularly affects UK students, and the number of our undergraduates who study for a term or a year at a university in another country, although growing, is still well below counterparts in France, Germany and Spain as the most recent figures from the Erasmus funding programme show:

Chart 1: Outgoing Erasmus students 2012–13



Source: Go International[6]

THE GROWING LANGUAGE DEFICIT

The UK is linguistically rich not only in its indigenous languages, Welsh, Gaelic, Irish, Scots, Ulster Scots, Manx and Cornish, but in the 200–300 languages from around the world spoken among its diverse population. These include many speakers of the languages identified as important for the UK's future needs – an outstandingly valuable resource. The four nations of the UK have taken different approaches towards language education appropriate to their different linguistic circumstances, and will continue to do so. But throughout the UK, it is the case that there is a widespread under-appreciation of the value of languages other than English which goes hand in hand with UK citizens' generally poor record when it comes to learning new languages.

4. British Academy (2016) *Born Global*. Available at: https://www.britac.ac.uk/born-global
5. Manuel Souto-Otero et al. (2013) Barriers to international student mobility: evidence from the Erasmus programme. *Educational Researcher* 42/2: 70–77. Available at: http://orca.cf.ac.uk/78118/
6. Go International (2014) *How the UK compares in Erasmus*. Available at: http://go.international.ac.uk/content/erasmus-figures

The only major international comparison of language capability, the European Survey on Language Competences, showed in 2012 that the achievement of pupils in England was lower than that of pupils from any other country taking part. Some 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.[7] However, since then, new GCSE and A-level courses have been introduced and there is a policy to increase the proportion of pupils obtaining the English Baccalaureate, which includes a GCSE in a modern or ancient language. A 2016 review of language teaching in English secondary schools noted that only 34 per cent of pupils obtain a good GCSE in a language, and less than five per cent do so in more than one language. The review concluded that this is 'damaging to our national interest and bad for pupils'.[8] In 2015 Ofsted found that achievement was not good enough in just under half the language lessons it inspected.[9] Since 2014, the teaching of a modern or ancient language has been part of the English national curriculum for pupils from age seven to 14, but a recent report showed that there are large disparities between primary schools in terms of both provision and outcomes.[10]

Scotland has been implementing an ambitious '1+2' language education policy, with the aim of introducing every child to two new languages in addition to English by the end of primary school.[11] The policy is part of Scotland's wider vision for young people to be successful learners, confident individuals, effective contributors and responsible citizens and sees language learning as crucial to this. The Scottish government has invested considerable resources in training and development in recognition of the scale of the change it wishes to see.

In Wales, only around one in five pupils takes a modern foreign language to GCSE and take up is less than ten per cent of the cohort in more than a third of secondary schools.[12] However, in 2016 the Welsh government introduced its Global Futures strategy with the ambitious aim of making Wales 'bilingual plus one' and introducing foreign language teaching in primary schools as part of a new broad curriculum area encompassing both Welsh and English.[13]

In Northern Ireland as in Wales, pupils are currently only required to learn a foreign language between the ages of 11 and 14. The 2015 Entitlement Framework, which gave pupils the right to access 24 subject choices for GCSE led to a decline in language uptake (see Chart 2). However, efforts to bring language teaching into primary schools have produced some good results and there is a growing realisation that an earlier start to language learning, with clusters of local schools working together, could have far-reaching social, economic and educational benefits.[14]

Despite these positive policy developments, entry numbers for language examinations are still dropping in all four countries. French and German have shown steep declines in all the countries of the UK, with Spanish and other languages more buoyant, though Spanish has seen a decline in Wales and a smaller one in England. Welsh as a first language, Gaelic in Scotland and Irish in Northern Ireland have all declined too, although there has been a big increase in entries for Welsh as a Second Language, which has become compulsory.

Declining numbers for these exams mean a smaller pool of students to take higher level qualifications which is increasingly a problem throughout the UK, despite some previously positive signs from Scotland.

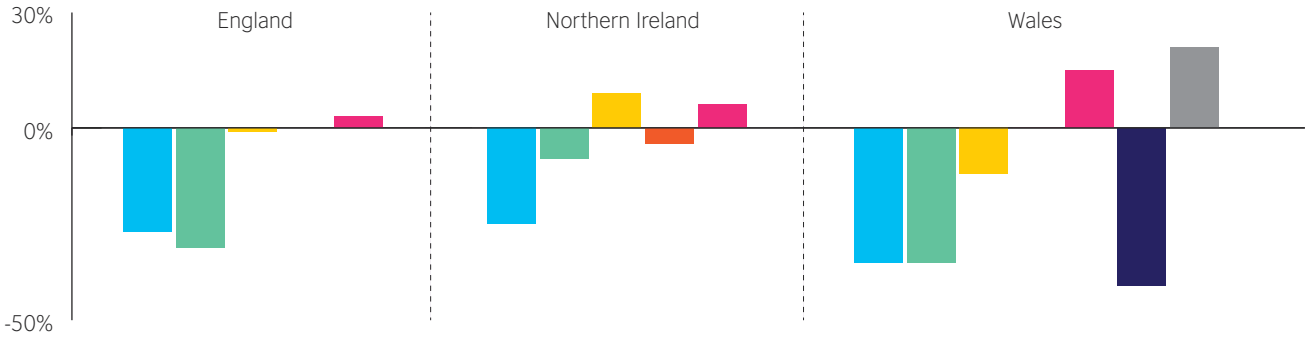
7. European Commission (2012) *First European Survey on Language Competences. Final report.* Available at: http://ec.europa.eu/dgs/education_culture/repository/languages/policy/strategic-framework/documents/language-survey-final-report_en.pdf
8. Teaching Schools Council (2016) *Modern Foreign Languages Pedagogy Review*, p.16. Available at: https://www.tscouncil.org.uk/modern-foreign-languages-report/
9. Ofsted (2015) *Key Stage 3: the wasted years*. Available at: https://www.gov.uk/government/publications/key-stage-3-the-wasted-years
10. Teresa Tinsley and Kathryn Board (2017) *Language Trends*, British Council. Available at: https://www.britishcouncil.org/education/schools/support-for-languages/thought-leadership/research-report/language-trends-2016-17
11. SCILT website *A 1+2 Approach to Language Learning*. Available at: www.scilt.org.uk/A12ApproachtoLanguageLearning/tabid/1715/Default.aspx
12. Teresa Tinsley and Kathryn Board (2017) *Language Trends Wales 2016/17*, British Council Wales. Available at: https://wales.britishcouncil.org/en/language-trends-wales
13. Welsh Government (2016) *Global Futures*. Available at: http://gov.wales/topics/educationandskills/publications/guidance/global-futures-a-plan-to-improve-and-promote-modern-foreign-languages-in-wales/?lang=en
14. Sharon Jones et al. (2017) *Review of current primary languages in Northern Ireland*, Stranmillis University College; Ian Collen et al. (2016) The transition from primary languages programmes to post-primary language provision, NICILT/Queens University Belfast. Available from: http://pure.qub.ac.uk/portal/en/publications/the-transition-from-primary-languages-programmes-to-postprimary-languages-provision(e437f5d8-2784-40a2-a8d1-442e167affa5).html

There is continuing concern about the low level of take up for language degree courses (see Chart 7 on page 13) as well as cuts and threatened closures of university language departments, most recently Manchester and Brighton. Lower numbers of graduates entering the workforce with language skills not only puts employers in a position where they must look abroad for the skills they need or 'make do with English', but means that there is a shortage of teachers to bring forward the next generation of linguists.

Employer satisfaction with school and college leavers' language skills now stands at a low of 34 per cent. However, few businesses say that they think that foreign languages are a priority for action in either primary or secondary education.[15] Nevertheless, the British Chambers of Commerce has called for language teaching to be made compulsory between ages seven and 16 to 'help entrepreneurs become more globally-minded' and remove barriers to exporting.[16]

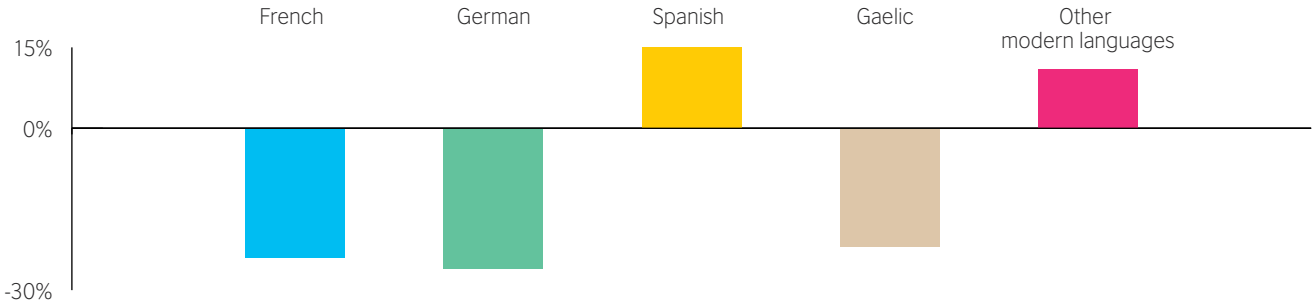
Overall our country's language deficit appears to be growing. In addition, the UK's language industry – international translation, interpreting, web localisation and other language services worth over £1 billion – is highly dependent on native speaker linguists from other EU countries whose expertise may be more difficult to access after Brexit.[17]

Chart 2: Changes in entries for languages at GCSE, 2013–17



Source: Joint Council for Qualifications[18]

Chart 3: Changes in entries for languages at Scottish National 5, 2014–17*



Source: Scottish Qualifications Authority[19]
*Gaelic and other modern languages based on 2014–16.

French · German · Spanish · Irish · Other modern languages · Welsh L1 · Welsh L2

15. CBI/Pearson (2017) *Helping the UK to thrive op.cit.*
16. British Chambers of Commerce (2014) One in five service firms on the verge of exporting (press release). Available at: http://exportbritain.org.uk/latest-news/bcc-one-in-five-service-firms-on-the-verge-of-exporting.html
17. Chartered Institute of Linguists (2017) UK language industry. CIOL concerned for the future of EU nationals in Britain following Brexit (press release). Available at: www.ciol.org.uk/uk-language-industry-%E2%80%93-ciol-concerned-future-eu-nationals-uk-following-brexit
18. www.jcq.org.uk
19. www.sqa.org.uk

MAKING SENSE OF THE UK'S LANGUAGE NEEDS POST BREXIT

Language capability in the UK population

Surveys of the British population are consistent in indicating that just over one third of British adults are able to hold a basic conversation in at least one other language besides their mother tongue.[20]

This figure includes those who do not speak English as their first language. In 2006, Eurobarometer put the figure at 38 per cent, rising to 39 per cent in 2012,[21] while the most recent survey for the British Council found that 37 per cent of British adults say they are able to hold a basic conversation when abroad. This proportion does not vary significantly between the four nations of the UK.

French, German and Spanish are the languages British people are most likely to speak, reflecting the languages most frequently taught in UK schools. There is a wide variety of other languages spoken by smaller numbers which reflects the overseas backgrounds of UK residents, and the efforts of parents and supplementary schools to develop competence and literacy in languages which are not generally taught in schools.

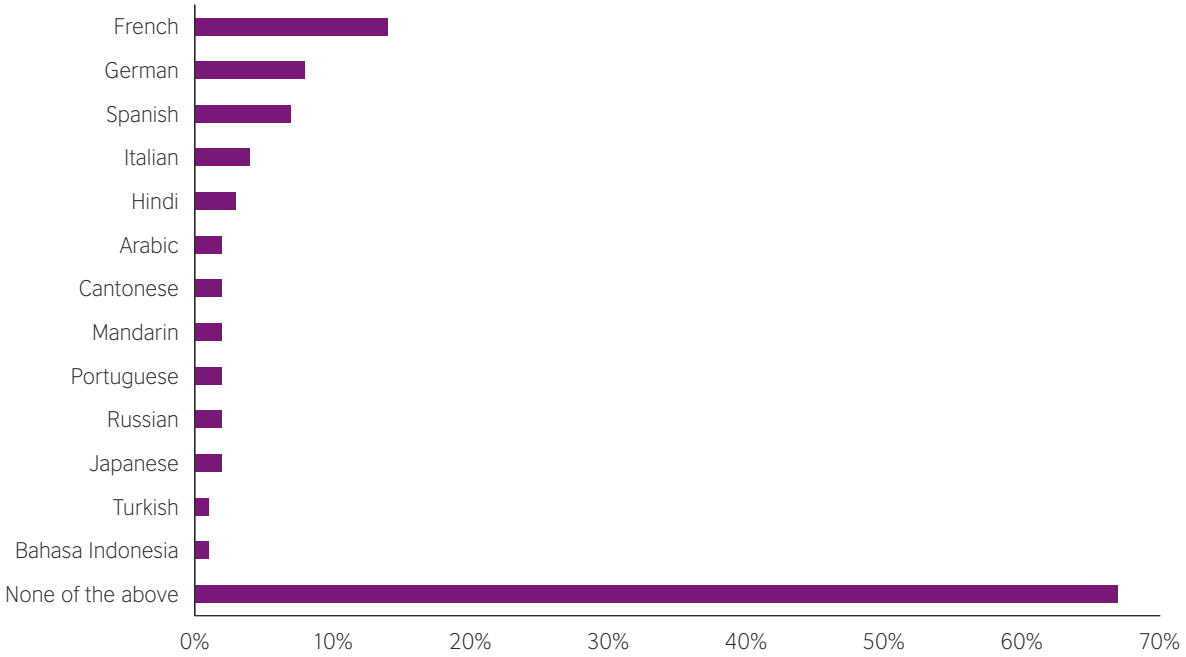
Language teaching in schools

Unlike their peers in other countries, people in the English-speaking world do not have one single obvious new language to learn. Traditionally our schools and universities have taught French and German, and these are the languages that have suffered most from recent declines. In the last 20 years or so, Spanish has increased in importance; in 2004, it overtook German in terms of the number of entries for A-level in England, Northern Ireland and Wales, and now accounts for more than twice as many candidates. This pattern is repeated in Scotland. Other languages are not widely taught in mainstream schools, although their numbers are boosted by candidates from abroad studying in independent schools, and by children who acquire language competences at home and/or by attending supplementary schools on Saturdays or after school.

Charts 5 and 6 refer to entries from England, Wales and Northern Ireland and show that the differential between the widely-taught and lesser-taught languages is much greater at GCSE than at A-level. At GCSE, the top three languages remain in the same positions as in the 2013 research. There is, however some rearrangement of the order of importance further down the table and Urdu replaces Turkish.

Chart 4: Language skills among 18–34 year olds in the UK

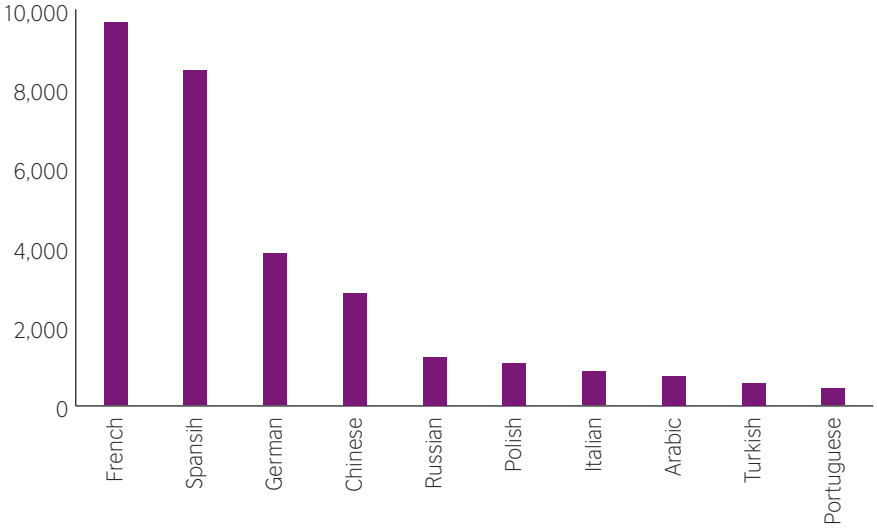
'Do you speak any of these languages well enough to hold a conversation?'



Source: Ipsos MORI poll for the British Council[22]

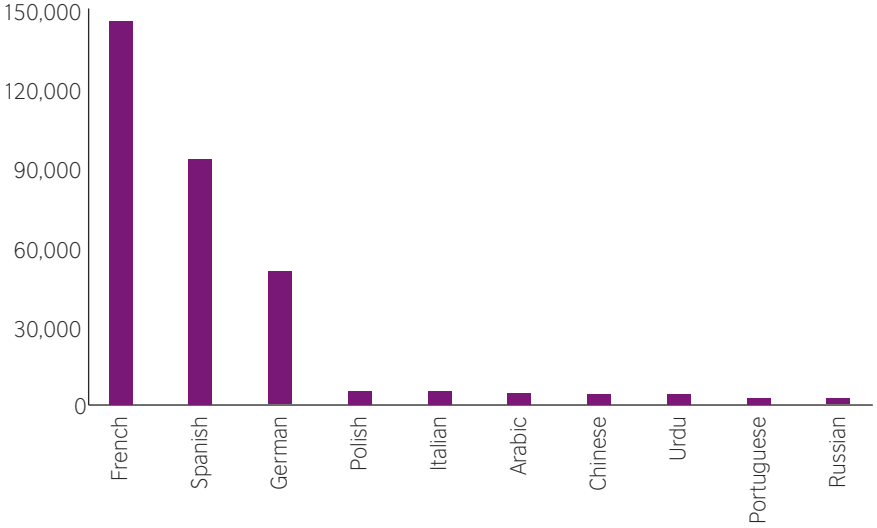
20. Populus survey for the British Council, July/August 2017. British Council (2017) Parlez-vous English? British holidaymakers embarrassed by poor language skills (press release). Available at: https://www.britishcouncil.org/organisation/press/british-holidaymakers-embarrassed-poor-language-skills
21. European Commission (2006) Europeans and their languages, Special Eurobarometer 243. Available at: https://ec.europa.eu/commfrontoffice/publicopinion/archives/ebs/ebs_243_en.pdf; *Ibid*, 2012, Europeans and their languages, Special Eurobarometer 386. Available at: https://ec.europa.eu/commfrontoffice/publicopinion/archives/ebs/ebs_386_en.pdf
22. Sample of 1,000 UK residents aged 18–34 carried out 8 September – 16 October 2016.

Chart 5: Top ten languages at A-level 2016



Source: Joint Council for Qualifications[23]

Chart 6: Top ten languages at GCSE 2016



Source: Joint Council for Qualifications[24]

Schools in the UK are permitted to teach any language, but they are constrained, among other factors, by the availability of qualifications and of teachers. Although GCSE and A-level qualifications exist in 19 foreign languages, teacher training courses focus almost exclusively on French, Spanish and German. In Scotland, qualifications are available in Italian, Mandarin, Cantonese and Urdu in addition to French, Spanish, German and Gaelic. There are important staffing implications for schools wishing to introduce a new language: in the first year, they are unlikely to have enough classes for a full-time teacher, but as numbers increase year on year, they would need to plan for extra staffing capability, as well as taking into account any knock-on effect on existing language staff. Head teachers say their main concern is a plentiful supply of high quality teachers and with very few teacher training routes available for the lesser-taught languages, introducing a new language is a considerable risk.[25] These factors explain why it has been difficult for languages such as Mandarin Chinese,[26] Japanese or Arabic to gain a foothold in the system or to achieve a critical mass, despite pockets of intense enthusiasm and good practice.

'The government must recognise that professional linguists based in the UK, regardless of their nationality, are going to be crucial professionals alongside EU trade negotiators and lawyers in the government's objectives of realising a successful post-Brexit global economy.'

Ann Carlisle, Chief Executive, Chartered Institute of Linguists[27]

23. www.jcq.org.uk
24. *Ibid.*
25. Alcantara Communications (2016) The Teaching of Arabic Languages and Cultures in UK schools, British Council. Available at: https://www.britishcouncil.org/sites/default/files/arabic_report_2015.pdf; Alcantara Communications (2015) The Teaching of Chinese in UK Schools. Available at: www.britishcouncil.org/sites/britishcouncil.uk2/files/alcantara_full_report_jun15.pdf
26. We distinguish between Mandarin and other Chinese languages wherever sources allow.
27. Ann Carlisle (2017) 'UK language industry – CIOL concerned for the future of EU nationals in the UK following Brexit' (press release). Available at: www.ciol.org.uk/uk-language-industry-%E2%80%93-ciol-concerned-future-eu-nationals-uk-following-brexit

‘Speaking German will not only get you, in general, the highest-paid job, it is also the language that is in highest demand across job postings.’

Lianna Brinded, Finance Editor, Business Insider [28]

Where schools do teach more than one language, pupils or their parents may have a choice and it is likely that the rise of Spanish has been driven by popular preference as much as by systemic factors. The number of state schools teaching German has declined from around three quarters to about half currently, despite being the language which is in most demand in the jobs market and the one which commands the highest salaries. [29]

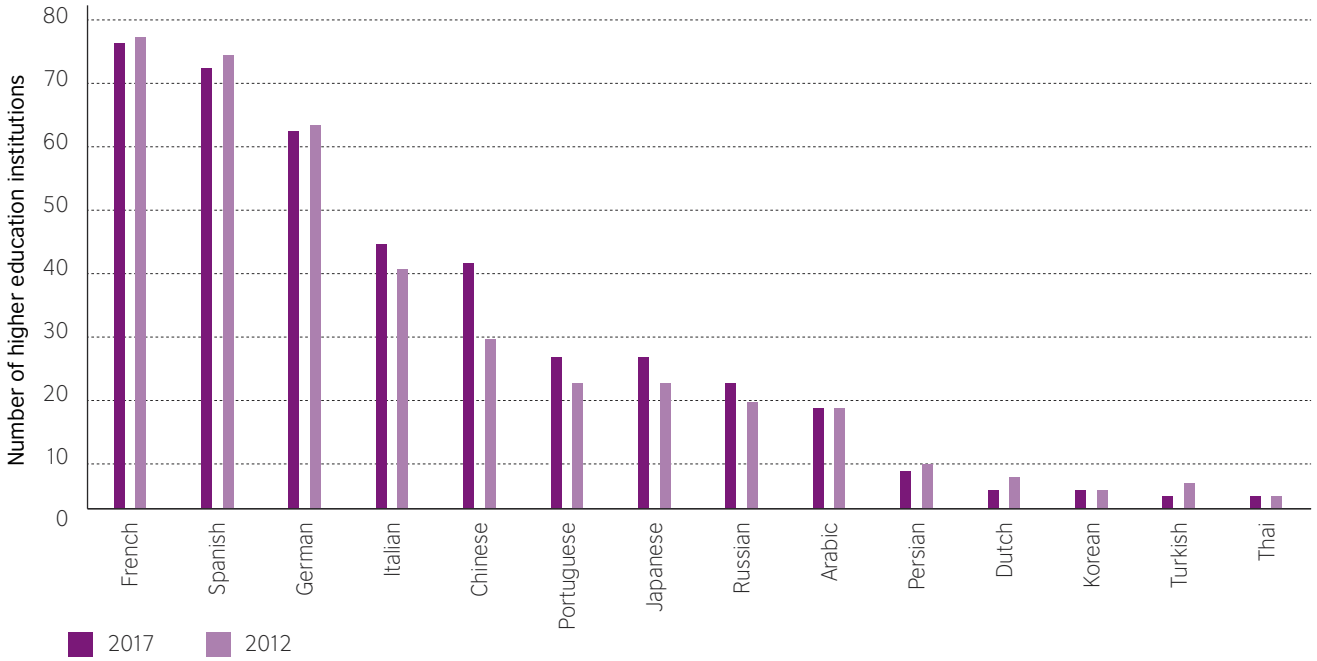
Languages in higher education

French, Spanish and German are widely available as degree courses in universities throughout the UK, although there has been some shrinkage recently. Chinese studies, in contrast, has become more widely available, though it is difficult to find reliable data on how many students are catered for, or the level of linguistic competence achieved at the end of the course.

A detailed review of language provision in higher education found that very little language learning was taking place in conjunction with courses which explicitly develop workplace skills. [30]

Languages are virtually absent from vocational courses, and opportunities to study them beyond GCSE level are in decline as colleges cut courses. [31] University College London is exceptional in requiring all UK honours degree students to have a basic competence in a modern foreign language. [32] With the UK now poised to leave the EU, schools report that some pupils and parents are questioning whether there will be a continuing need to learn European languages, and pupils are uncertain about what options will be open to them in future if they do. [33] The time is therefore right to re-examine which languages the UK needs most.

Chart 7: Degree courses in selected languages available in the UK



Source: UCAS [34]

28. Lianna Brinded (2016) ‘The top 9 languages for the highest paid jobs in Britain’, *The Independent*. Available at: www.independent.co.uk/news/business/analysis-and-features/the-top-9-languages-for-the-highest-paid-jobs-in-britain-a7329201.html
29. *Ibid.*
30. *Ibid.* page 116.
31. Rosemary Bennett (2017) ‘Struggling Sixth Form Colleges drop languages, ICT and drama’, *The Times*. Available at: https://www.thetimes.co.uk/article/struggling-sixth-form-colleges-drop-languages-ict-and-drama-6kszvrzxn
32. University College London, Pre-course MFL requirement. Available at: www.ucl.ac.uk/clie/CourseUnits/Pre-course/MFLrequirement
33. Teresa Tinsley and Kathryn Board (2017) *Language Trends 2016–17*, British Council, *op. cit.* page 96.
34. UCAS (2017) www.ucas.ac.uk. 2012 data from Teresa Tinsley (2013) *Languages, The State of the Nation*, British Academy. Available at: https://www.britac.ac.uk/publications/languages-state-nation

IDENTIFYING THE LANGUAGES THE UK NEEDS

METHODOLOGY

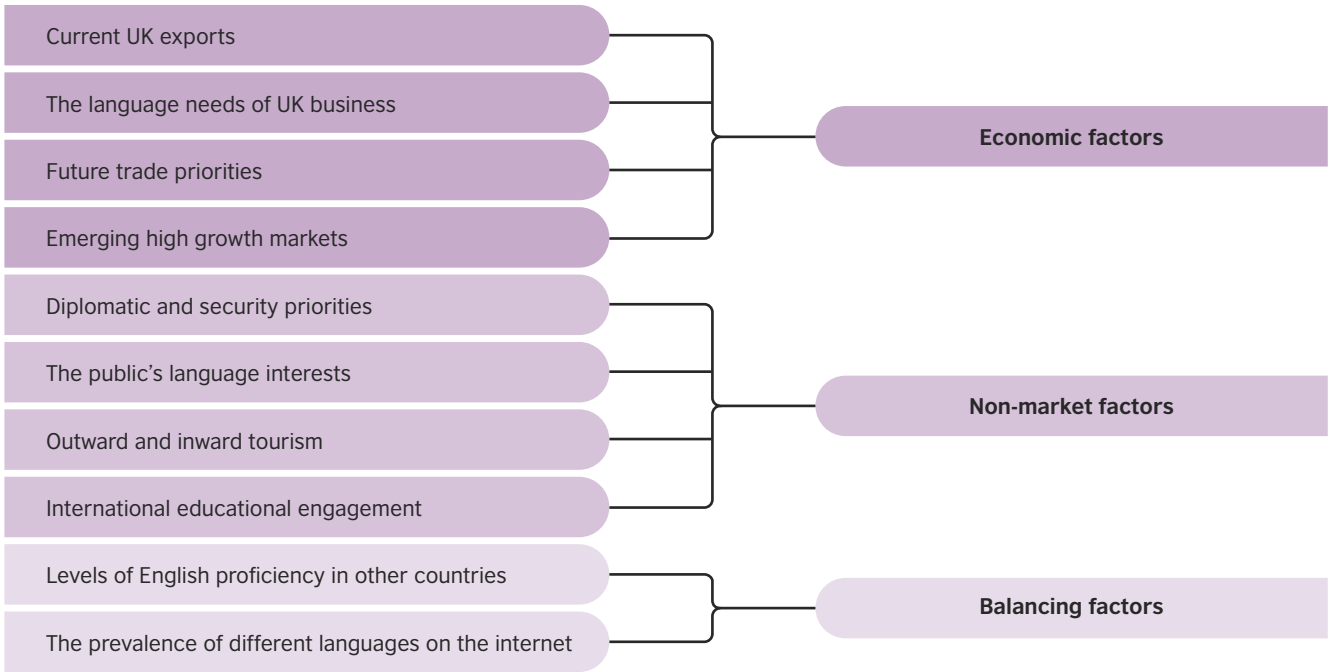
There are many different factors which need to be taken into account when considering which languages are going to be most useful to the UK in future. Both market and non-market dynamics need to be assessed in order to balance economic as well as cultural requirements. The British public's interest in learning different languages is a factor, alongside the need to develop international relationships for diplomatic, commercial, educational or cultural purposes. This analysis, as in 2013, uses a set of ten criteria to identify the languages likely to bring the most benefits to the UK.

Four economic factors were weighted against four non-market factors, 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. The criteria were designed to take into account both the current situation and future strategic requirements for the UK.

Fresh data has been gathered from international organisations, from UK government sources, from business organisations and from independent research. The criteria capture both 'bottom up' indications from business organisations and the general public, and the requirements for languages to support 'top down' government policy. The research should be read with an understanding that personal motivations and preferences as well as organisational need have an important role to play at the level of individual choice.

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 Scotland, Northern Ireland, Wales or England respectively. As has been noted above, the aim is not to provide detailed or definitive answers, but rather to initiate a strategic discussion about which languages are and will be most important for people in the UK to be able to speak.

Table 1: Factors considered in determining most important languages



ECONOMIC FACTORS

There are many unknowns. Predictions of the full economic impact of Brexit have barely started to emerge and negotiations on the terms of our exit from the EU are ongoing at the time of writing. After they have been agreed, the UK will no doubt embark on a period of significant readjustment to its new status. To what extent will leaving the EU have an impact on the amount of trade it does with EU countries, currently accounting for 44 per cent of UK exports in goods and services? If there is an impact, to what extent will this be counterbalanced by increased trade with other markets, and how quickly?

And what role will languages play in achieving this? It is notable that many of the countries which the UK government has identified for new free trade deals are English-speaking (the United States, India, China, Australia, New Zealand, South Korea and the Gulf states).[35] However, we do not yet know which of these potential deals, or indeed others, may come to fruition or how quickly. For some years now, the UK has increasingly been trading with emerging and advanced economies from outside the EU, with the proportion of trade with EU countries falling since 1999. However, the CBI states that 'the major European economies are still the largest export markets for British goods and are likely to remain so after Brexit'.[36]

'As firms look to markets around the world, languages are becoming increasingly valuable. Employers are showing a growing interest in those skills.'

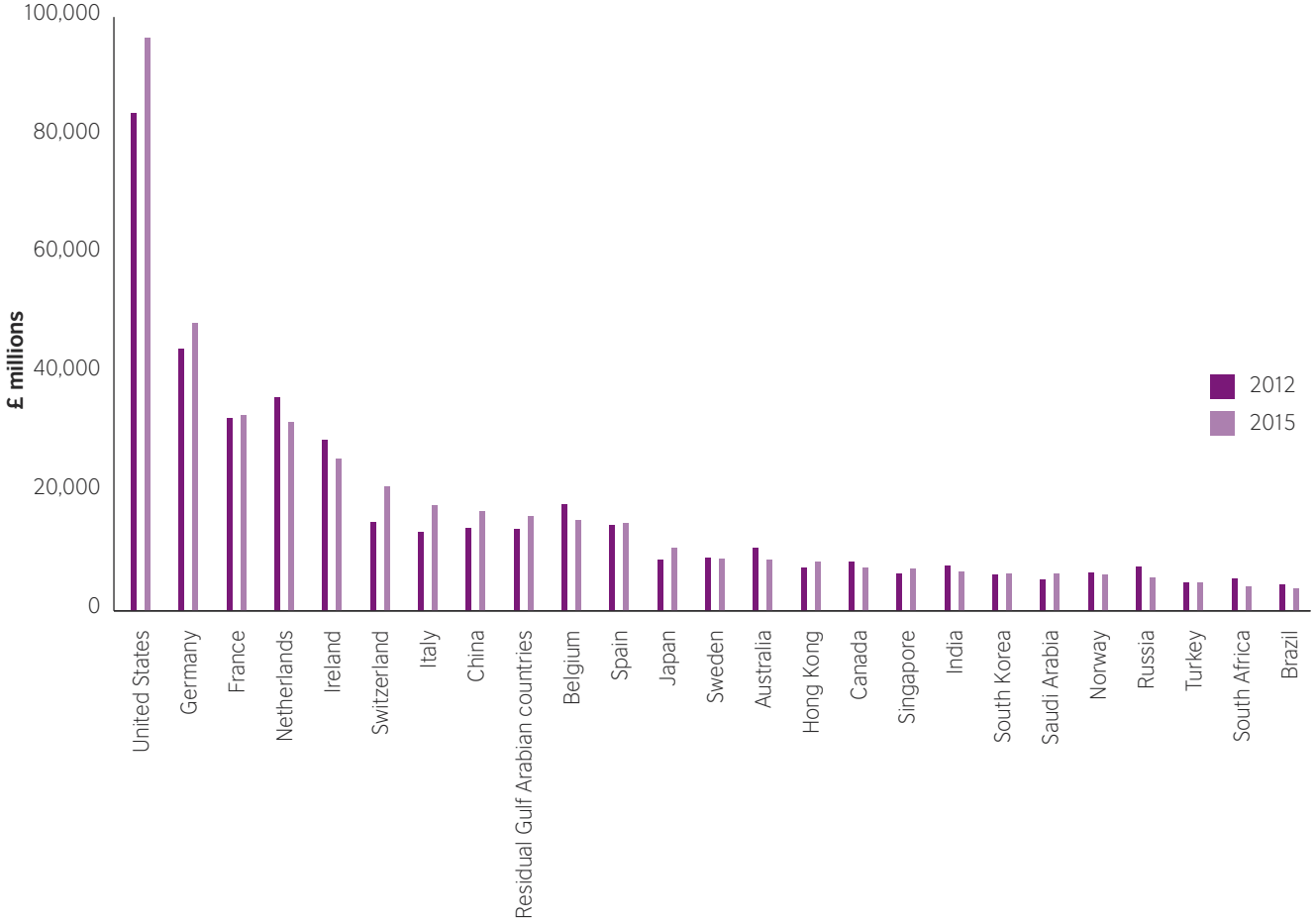
Dr Adam Marshall, Director General, British Chambers of Commerce[37]

35. House of Commons International Trade Committee (2017) Oral Evidence, UK trade options beyond 2019, United Kingdom Parliament. Available at: https://www.parliament.uk/business/committees/committees-a-z/commons-select/international-trade-committee/inquiries/parliament-2015/uk-trade-options-beyond-2019-16-17/
36. CBI/Pearson (2017) *Helping the UK to thrive. Op.cit.* page 35.
37. City AM (2014) 'Is a foreign language worth the investment?'. Available at: www.cityam.com/article/1398899641/foreign-language-worth-investment

Indicator 1 – Current UK exports

For this indicator, we have used the latest available data from a single source which allows us to track developments since 2012 in the main markets for UK goods and services exports. The UK's largest non-English-speaking export markets are Germany, France and the Netherlands. The most notable change since 2012 is a 25 per cent drop in export trade with Russia, primarily as a result of international sanctions. The so-called 'Rotterdam effect', by which goods on their way to third countries are exported initially to major international ports such as Rotterdam, accounts for the high number of exports to the Netherlands. Goods exports to Switzerland, Italy and China showed significant growth over the period in question, and service exports, where it is likely that language skills have a particularly significant role to play, grew strongly in Italy, Japan, Germany and Switzerland. However, the value of exports to India, South Africa and Brazil – countries previously identified in our last report as important target markets – actually fell.[38]

Chart 8: UK exports of goods and services, main markets



Source: ONS Balance of Payments and annual geographical tables. Note residual Gulf Arabian countries means Bahrain, Iraq, Kuwait, Oman, Qatar, UAE and Yemen.[39]

38. Data from CBI/Ernst and Young (2011) Winning overseas, quoted in Teresa Tinsley and Kathryn Board (2013) *Languages for the future, which languages the UK needs most and why*, British Council, page 13. Available at: https://www.britishcouncil.org/organisation/policy-insight-research/research/languages-future

39. Office for National Statistics (2017) Balance of Payments and annual geographical tables. Available at: https://www.ons.gov.uk/economy/nationalaccounts/balanceofpayments/adhocs/006656balanceofpaymentsannualgeographicaldatatables

Compared to our 2013 analysis, Italian has risen at the expense of Spanish, and Russian has dropped out to be replaced by Cantonese. However, as a review of advertisements for jobs with languages shows (see Indicator 2), the extent of current trade with a country does not translate straightforwardly into demand for that country's language. We do not know to what extent language skills come into play, and this will also vary from country to country depending not only on how much others are able or willing to operate in English but also on the type of goods or services traded. Although Dutch appears further down the ranking when it comes to job vacancies, there are nevertheless a considerable number of jobs advertised which require the language, for example in customer services, sales, IT, finance and marketing.

There are slight differences in the most important export markets for the four nations of the UK. It is notable that Germany is by far Wales's biggest export market and that China is one of Scotland's most important export markets, with trade increasing by 76 per cent between 2015 and 2016.[40] Canada is an important destination for Northern Irish exports, while trade between Northern Ireland and both France and Malaysia has been shrinking.[41]

From the data above, we can infer demand for the following languages for the top export markets in this order:

Table 2: Demand for languages in top export markets 2017 and 2013

2017		2013
German	–	German
French	▲	Dutch
Dutch	▼	French
Italian	▲	Mandarin
Mandarin	▼	Spanish
Arabic	▲	Italian
Spanish	▼	Swedish
Japanese	▲	Russian
Swedish	▼	Arabic
Cantonese	▲	Japanese

Indicator 2 – The language needs of UK business

The latest edition of the CBI/Pearson annual Education and Skills survey of employers found that the languages employers say they need most are French, German and Spanish (see Chart 9).[42]

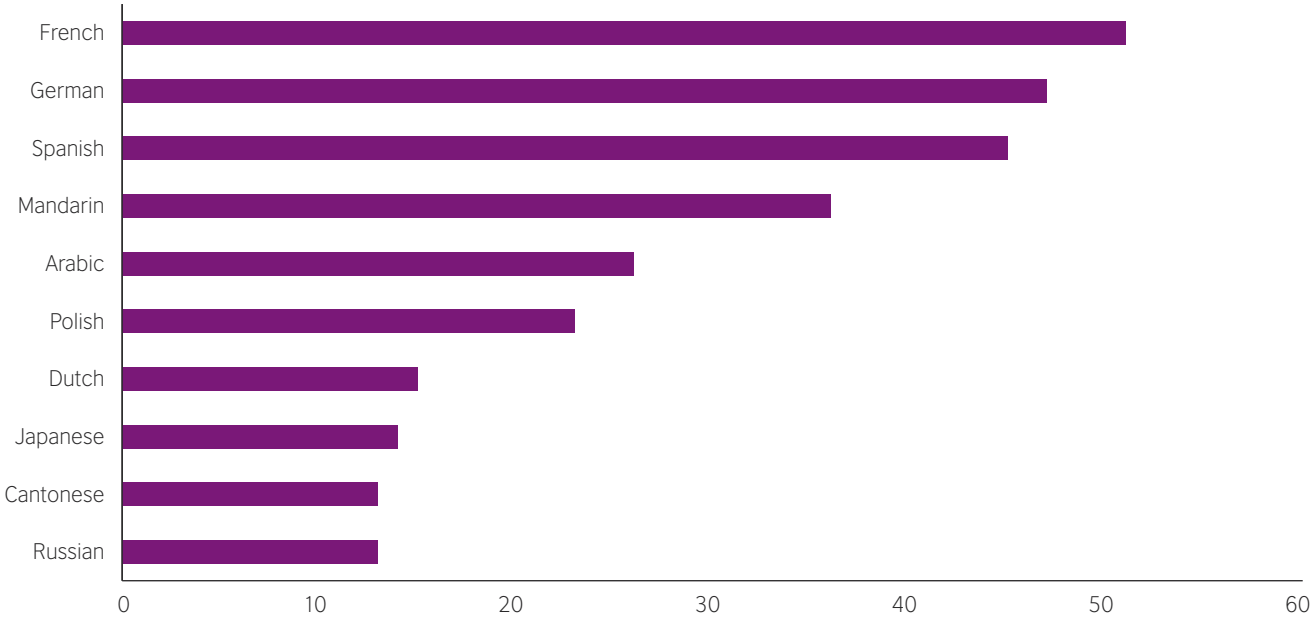
Since 2013 there have been very few changes and not at all at the top of the table. The proportion of companies citing French and German as useful to their business has declined slightly while the proportions citing Spanish, Mandarin and Arabic have increased. The incidence of Polish is thought to be largely due to the need to communicate with Polish workers in the UK rather than a need springing from international business with Poland. In the light of possible future restrictions on the freedom of movement of EU citizens to the UK, this may diminish in the future.

The CBI/Pearson survey, which seeks to inform education policy, also shows that employer satisfaction with school/college leavers' foreign language skills has declined sharply in the past year, now standing at 34 per cent compared to 42 per cent in 2016 and 40 per cent in 2015 (36 per cent in 2013).[43] The report highlights the need for more language skills if Britain is to be successful as a globally-open trading nation, making the point that there are significant benefits in even a basic level of proficiency, even though some roles require a high level of language competence.

40. HMRC (2017) *Regional Trade Statistics, Q4 2016 Commentary*, page 18. Available from: https://www.uktradeinfo.com/Statistics/RTS/Pages/RTSArchive.aspx. The increase was worth £532 million. There is no indication as to what type of goods were involved.
41. *Ibid.* page 22.
42. CBI/Pearson (2017) *Helping the UK to thrive. Education and Skills Survey, op. cit.*
43. Anne Marie Graham (2013) 'Labour Market Intelligence for Languages. A picture of the jobs market, summer 2012' in Teresa Tinsley (2013) *Languages, the State of the Nation*, British Academy, page 181, *op. cit.*

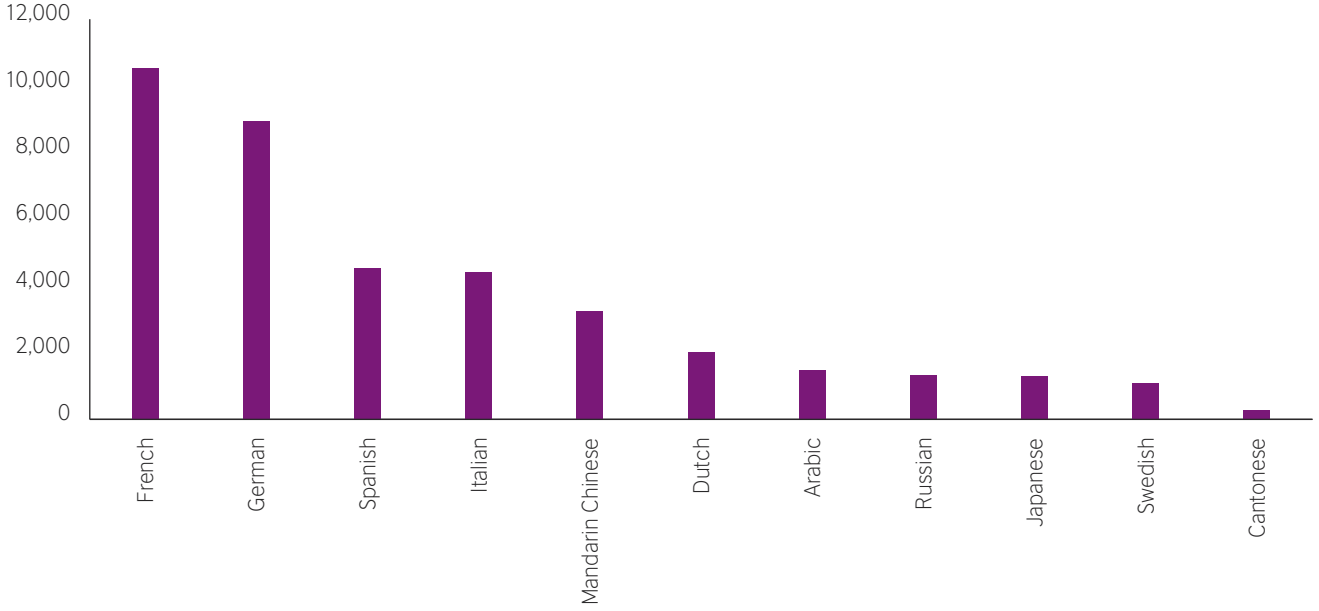
Five years ago, Labour Market Intelligence research based on job advertisements from a number of websites put German in first place, followed by French, Spanish, Italian, Dutch, Russian, Swedish, Portuguese, Danish and Norwegian, with Chinese languages (Mandarin and Cantonese being treated together) trailing in 11th place.[44] Comparison of the two sets of findings suggests that, in the intervening period, demand for Mandarin Chinese, Arabic and Japanese has overtaken demand for Russian, Portuguese and Scandinavian languages (see Chart 10).

Chart 9: Percentage of companies rating this language as useful to their organisation



Source: CBI/Pearson Education and Skills survey 2017

Chart 10: Job vacancies with a language requirement



Source: www.adzuna.co.uk

44. *Ibid.* page 24.

Indicator 3 – UK government's future trade priorities

In 2017, the Department for International Trade launched a strategy which named 50 overseas markets for UK business development post-Brexit. This supersedes the 2011 report *Trade and Investment for Growth* published by the Department for Innovation and Skills, which we used in our earlier report as the data source for this indicator, but continues to highlight the breadth and diversity of countries with which we hope to deepen our trading relationships, and their linguistic contexts.

The 50 markets identified by the Department for International Trade include:

Africa; Australia; Azerbaijan; Belgium; Brazil; Canada; Chile; China; Denmark; Finland; France; Germany; the Gulf; Hong Kong; India; Indonesia; Iran; Iraq; Italy; Japan; Kazakhstan; Kuwait; Lithuania; Malaysia; Mexico; Mongolia; the Netherlands; New Zealand; Norway; Oman; Philippines; Poland; Qatar; Singapore; South Africa; South Korea; Spain; Sweden; Switzerland; Taiwan; Thailand; Tunisia; Turkey; USA; Ukraine.[45]

From this source, we extracted the relevant languages, which are many, with some languages appearing more than once – for example there are six mentions for Arabic while French, Mandarin and Spanish each have three. In order to understand which languages might come into play for 'Africa', a continent with more than a thousand languages (by some calculations as many as 3,000), we reviewed which African countries had opportunities advertised on the government's Exporting is Great website.[46] Opportunities in Sub-Saharan Africa show Kenya with six opportunities advertised, Uganda with three, and one each in Ethiopia, Liberia, Madagascar, Malawi, Nigeria and Mozambique/ Zambia. Swahili, the lingua franca of much of eastern and south-eastern Africa, would appear to be the language with most to offer here, while French comes into play as a common language in northern and central Africa.

Russia, currently affected by international sanctions, is not included in the government's priority list of countries; however, the Exporting is Great website lists a large number of opportunities in Russia and various press articles have also highlighted the opportunities for the UK to partner with Russia post-Brexit.[47]

Indicator 4 – Emerging high growth markets

For this indicator, we used an independent report which focuses specifically on opportunities for the UK. *Thinking Global, the route to UK exporting success*, published in October 2016, looks at opportunities for small and medium-sized enterprises (SMEs), which it calls 'tomorrow's mini-multinationals'.[48]

This report identifies language barriers as the biggest challenge for SMEs looking to develop markets overseas – by 15 per cent of respondents – apart from the challenge of Brexit itself.

Table 3: Top ten emerging markets in order of expected growth to 2020, together with their official languages

Country	Official language
India	Hindi, English
Vietnam	Vietnamese
Ghana	English
Indonesia	Bahasa Indonesia (Malay)
China	Mandarin
Malaysia	Malay
Thailand	Thai
United Arab Emirates	Arabic
Turkey	Turkish
Poland	Polish

Source: Centre for Economics and Business Research, 2016[49]

45. Department of International Trade (2017) 'International Trade Secretary: 2017 must be "Year of Exporting"' (press release). Available at: https://www.gov.uk/government/news/international-trade-secretary-2017-must-be-year-of-exporting
46. HM Government, Exporting is Great website. Available at: www.export.great.gov.uk
47. Russian Direct website. Available at: www.russia-direct.org/opinion/post-brexit-russia-would-make-interesting-trade-partner-britain This website has not been updated since March 2017 for funding reasons; Vicki Oliphant (2016) 'New Britain-Russia trade deal?', Express Online. Available at: www.express.co.uk/news/uk/728420/Britain-Russia-trade-deal-European-Union-Brexit-punishment
48. Centre for Economics and Business Research (2016) *Thinking Global. The route to UK exporting success, World First.* Available at: https://www.worldfirst.com/downloads/Think_Global_WorldFirst.pdf
49. *Ibid.* page 30. The findings are in line with projections from the World Bank published in June 2017: World Bank Group (2017) Global Economic Prospects. Available from: www.worldbank.org/en/news/press-release/2017/06/06/global-growth-set-to-strengthen-to-2-7-percent-as-outlook-brightens

In addition to the official language or languages of each country, many other languages also come into play. English is widely used in the United Arab Emirates as well as in Malaysia (along with Tamil). Ghana has a rich variety of local languages and in India over 20 languages besides Hindi and English have official recognition. The report also lists Mexico, Nigeria and Saudi Arabia as economies expected to grow faster than the eurozone in the period up to 2020, giving extra weight to Spanish, Arabic and the multiple languages of Nigeria which are used alongside the official language of English.

The sources used in 2013 highlighted the so-called BRIC(S) countries, Brazil, Russian, India, China and South Africa. However, two of these countries, Russia and Brazil, have experienced serious economic downturns since 2013: the Russian economy has not kept pace with Goldman Sachs' original projections, and the Brazilian economy remains very fragile.[50] In 2013 we highlighted the precarious nature of making predictions for future economic growth, particularly in contexts of political instability. Although the latest reports show that the Russian economy is now back on its feet, the source we have used for this indicator in 2017 does not expect Russia – or South Africa – to grow strongly in the period up to 2020.

Interim analysis of languages needed for economic purposes

By combining the evidence from the four economic indicators used, the top five languages are French, German, Mandarin, Arabic and Spanish. The same five languages topped the table in 2013, although the order has changed slightly. Using the 2017 data, French has overtaken German for top place, and Mandarin has overtaken Spanish and Arabic for third place. Portuguese, Russian and Swedish have dropped out of the table, to be replaced by Japanese, Italian and Indian languages, while Polish has risen to sixth place.

Given the same five languages appear consistently at the top of the table, we can be fairly confident in concluding that these are the five languages the UK will need most for business and trade in future, and that Brexit will not change that in the foreseeable future. Lower down the table, the situation is more complex. There are a number of languages jostling for a place in the top ten. Although Portuguese and Russian have dropped out in the 2017 analysis, it would be very unwise to conclude that they will not be of value to the UK in future, given the economic potential, and sheer size, of Brazil and Russia.

Other languages in the frame are, for example, Vietnamese, Thai, Indonesian and Malay – see Appendix for scoring grid. These and other world languages may come to the fore in future alongside or even ahead of some of the less-widely spoken European languages.

Table 4: Languages needed for economic purposes

Languages		2017 scores from indicators 1–4	2013 positions
French	▲	22	German
German	▼	21	French
Mandarin	▲	20	Spanish
Arabic	–	19	Arabic
Spanish	▼	16	Mandarin
Dutch	–	13.5	Dutch
Polish	▲	10	Portuguese
Italian	▲	8	Russian
Japanese	▲	7	Swedish
Hindi or other Indian languages	▲	6	Polish

50. Economist (2017) 'Four BRICS don't quite make a wall', *Economist*. Available at: https://www.economist.com/news/finance-and-economics/21723133-brazil-russia-india-and-china-have-done-even-better-forecastthanks-mainly

CULTURAL, EDUCATIONAL, DIPLOMATIC AND SECURITY FACTORS

Indicator 5 – Diplomatic and security priorities

This indicator draws on data from interviews and desk research focusing on the UK's current and future language needs in the areas of diplomacy and security.[51]

Diplomacy

The ability to speak the language of the host country is a prerequisite for 500–600 posts within the Foreign and Commonwealth Office (FCO) around the world, based on the requirements of the specific job and the extent to which it is possible or desirable to communicate using only English.

Table 5: FCO priority languages

Priority languages for diplomacy	
Priority 1 (languages of the United Nations)	• Arabic • French • Mandarin • Russian • Spanish
Priority 2 languages	• Farsi • German • Japanese • Korean • Portuguese • Turkish

Source: Interview with senior FCO official, July 2017

As the UK pursues a 'global Britain' in tandem with withdrawal from the EU, language skills and intercultural understanding are likely to remain at least as important as currently for successful international relations and the ability to represent HM government effectively, in Europe and elsewhere. Around 80 per cent of FCO language work involves 11 priority languages, spread over two categories of importance.

Defence

Military personnel are currently deployed in many countries around the world where language skills are needed in a wide range of posts and at different rank levels. There are several hundred posts such as defence attachés, liaison officers and intelligence staff, plus many other lower-level operational requirements.

The need for language and cultural skills in the Ministry of Defence (MOD) continues to be of importance to help prepare for emerging operations or wider defence engagement around the world.

Earl Attlee made the point for the government in a recent House of Lords debate: '*we do not know which local language will be applicable to the next major operation, or whether it will be enduring or just a short intervention*'.[52]

UK Defence Doctrine makes various references to the need for cultural understanding and language skills, for example: '*The proximity of land forces to local populations allows them to distinguish between different people and groups, adjusting their interaction accordingly. Land forces therefore require a unique set of "people skills", including empathy, emotional intelligence, an understanding of culture and history, and an ability to communicate in the local language.*'[53]

The Defence Requirements Authority for Culture and Language is the custodian of the Defence Culture and Language capability and assesses personnel in up to 50 languages, depending on the need. The Defence Centre for Languages and Culture provides language training for MOD personnel. Defence has personnel tested and current in some 40 languages[54] with a further group of personnel who possess a latent language proficiency in over 100 languages but who are not yet tested or not current. This enables Defence to meet its current commitments, as well as providing a contingent pool of language skills capable of supporting emerging operational requirements. The unforeseen nature of these requirements makes it difficult to provide a set list of priority languages; the requirement is influenced by the contemporary operating environment, and the operational and defence engagement need.

'The FCO has always prided itself on local knowledge and global reach to advance British interests, with brilliant language skills at the core. A global Britain following our exit from the European Union will also need greater investment in languages to build and sustain the relationships – whether corporate or cultural, educational or governmental – for a stable and prosperous, globally linked Britain, as well as giving us competitive edge and greater insight into global and local developments.'

Caroline Wilson, Director, European Department, FCO

51. Interviews with senior Foreign and Commonwealth Office (FCO) and Ministry of Defence (MOD) staff and a review of the MOD and GCHQ websites undertaken during July 2017. The 2013 survey drew solely on the British Academy's report *Lost for Words* – the result of an enquiry into how languages are used by the UK government in meeting public policy priorities in diplomacy and security. The report reflected composite input from the FCO, the Serious and Organised Crime Agency and Government. Communication Headquarters (GCHQ) among others. However, the report was not designed to determine which languages were most needed and has not been repeated or updated since the EU referendum: British Academy (2013) *Lost for Words*. Available at: https://www.britac.ac.uk/publications/lost-words-need-languages-uk-diplomacy-and-security
52. *Hansard*, House of Lords debate 27 October 2016.
53. Joint Doctrine Publication 0-20 *UK Land Power*, June 2017 (page 16).
54. At a level which provides a capability for defence.

Intelligence services

GCHQ employs and trains linguists in a range of languages and is currently recruiting for specialists in Russian, Arabic and Mandarin.

Most important languages for diplomacy and intelligence

We have used the FCO priority languages as a basis for scoring this indicator, incorporating a small weighting to the language specialist roles advertised by GCHQ. We conclude that the most important languages for UK diplomacy and intelligence are currently Arabic, Mandarin and Russian, followed by French and Spanish, plus Farsi, German, Japanese, Korean, Portuguese and Turkish.

Indicator 6 – The public's language interests

This indicator recognises that the public do not simply respond to needs and priorities expressed elsewhere, but have a role in shaping them through their own behaviour and preferences. We therefore used the Hotcourses online database of language courses to ascertain which languages attract the most public demand.[55] With the caveat that the demand is often conditioned by the availability of courses, we used the search facility to count, for each language, the number of beginner-level courses available throughout the UK. As not all languages have qualifications available, we searched for courses not leading to a qualification, but including those offering a course certificate. The number of courses, including online courses, advertised for each language is shown in Table 6.

Using this measure, Spanish, Italian, French, German and Mandarin Chinese occupy the top five places in terms of grass-roots popularity. The same measure was used in 2013, and there have been no substantial changes in the public's language interests since then, except that the number of courses offered for Italian is now greater than those for French. In the case of the overlap between courses referred to as Mandarin or Chinese, we have not added both figures together, but nevertheless note that the total figure is larger than that for Chinese alone, making it a more widely-offered language than Japanese (and possibly also German).

A survey of institution-wide language provision in universities reveals that Japanese and German are increasing in popularity among students who take a language alongside their degree course, while university language centres are more likely to report that learner numbers for Arabic and Italian have declined.[56] These figures include a large proportion of students from overseas and the report notes that the popularity of Japanese is at least partly due to increased demand from Chinese and Korean students.

Table 6: Language courses available to the public

Languages	Number of courses offered in 2017
Spanish	208
Italian	167
French	158
German	69
Mandarin/ Chinese	51 'Chinese' and 37 'Mandarin', with some overlap)
Japanese	54
Arabic	26
Portuguese	23
Russian	23
Polish	18

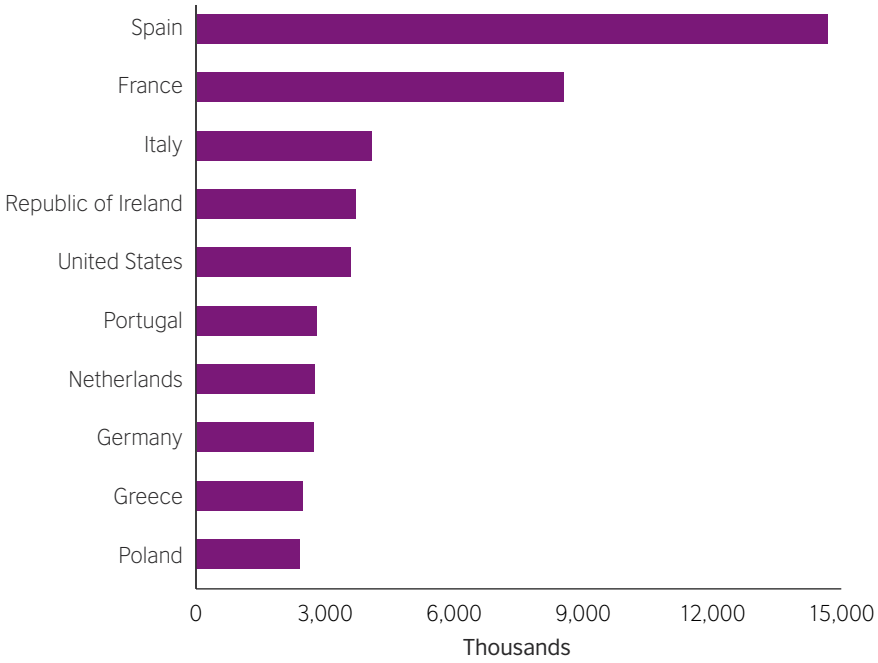
Source: www.hotcourses.com

55. www.hotcourses.com
56. UCML/AULC (2017) Survey of Institution-Wide Language Provision in Universities, 2016/17. Available at: www.aulc.org/wp-content/uploads/2017/10/UCML_AULC_2016-2017.pdf

Indicator 7 – Tourism and other overseas visits

Outward visitor destinations provide a good indication of interchange between different countries and peoples. The destinations of British tourists and other visitors abroad are representative of the extent to which people in the UK typically experience contact with speakers of other languages. Patterns of interaction abroad are conditioned by the ability to speak the language: those who do not do so may pay more for goods and services, stay primarily in resorts rather than experiencing the local culture, or worry they may cause offence or even put themselves in danger.[57]

Chart 11: Outgoing visits from the UK



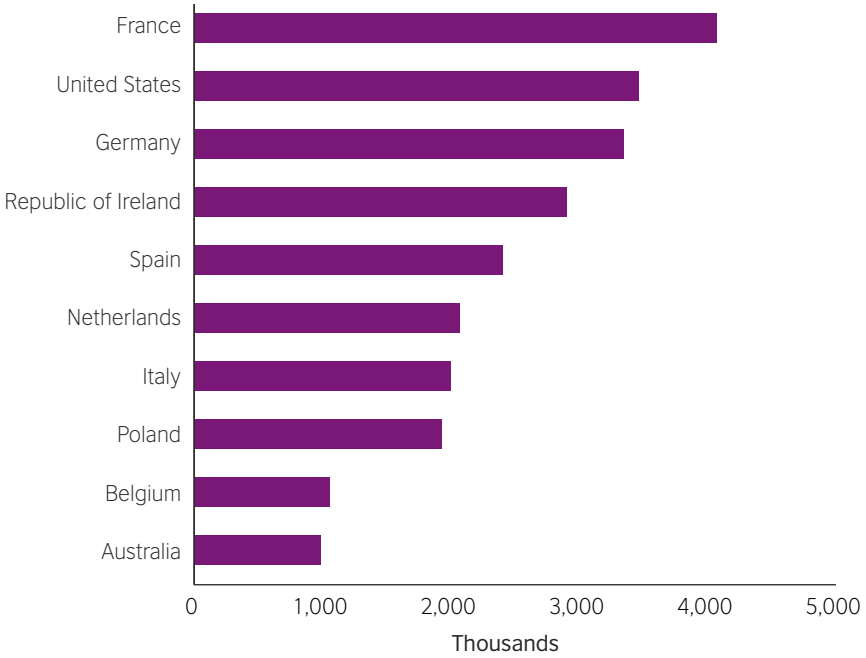
Source: ONS Travel Trends 2016

ONS visitor data (which includes travel for business and other purposes), published in May 2017 shows that Spain, France and Italy are the top three countries visited (including English-speaking countries), as they were at the time of our 2013 report, and their languages therefore remain important for tourism purposes.[58] Dutch and Portuguese are also important as tourist languages, and increasingly so as both Portugal and the Netherlands become increasingly popular destinations for British visitors. In contrast, Germany, Greece and Poland have dropped down the table and Turkey has dropped out of the UK's top ten tourist destinations, reflecting the recent damage done to the country's tourist industry by political turmoil and terrorist attacks.[59]

Languages also have a role to play in welcoming visitors from abroad to the UK.[60]

57. Research by Populus quoted in 2013 study: Tinsley and Board (2013) *Languages for the future, op. cit.* page 15.
58. ONS (2017) 'Top 10 countries visited by UK residents', Travel Trends 2016. Available at: https://www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism/articles/traveltrends/2016
59. International Monetary Fund (2017) 'Turkey's economy hit by declining tourism'. Available at: https://www.imf.org/en/News/Articles/2017/02/21/NA230217Turkeys-Economy-Hit-By-Declining-Tourism
60. ONS (2016) 'Overseas residents' visits to the UK', Travel Trends 2016, *op. cit.*

Chart 12: Incoming visits to the UK



Source: ONS Travel Trends 2016

In Scotland, visitors from Germany comprise the largest number of incoming tourists, and Scotland has identified Russia, India, China, Norway and Sweden as tourist markets for development.[61]

Indicator 8 – Priorities for international education

There are some major unknown factors in relation to the future of the UK's international co-operation in education.[62] Will the UK continue to participate in programmes such as Erasmus+ or Horizon 2020? What will be the future status of non-British EU nationals in UK universities, whether as staff or students? Universities UK has published a policy paper outlining the challenges for the sector as the UK leaves the EU, which include concerns about the recruitment of European staff and students, loss of funding for research and reduced outward mobility opportunities for staff and students. However, at the time of printing, no overarching strategy setting out government priorities for UK international educational engagement has been published.

A report from the Digital Science Consultancy for Universities UK, which looked at international research collaboration after the UK leaves the EU, makes the point that research collaboration with EU countries such as France and Germany has been growing faster than with other countries, and that while the UK should take every opportunity to be truly global in its outlook, the role of EU countries should not be underestimated.[63] Universities UK notes that six of the UK's top research partner countries are EU member states.

61. Visit Scotland, 'Top 10 inbound countries to Scotland 2016', International Markets. Available at: www.visitscotland.org/research_and_statistics/visitor_research/visitor_research_international.aspx
62. In the 2013 edition of this research, we used the government's International Education Strategy 2013 as a source for this indicator.
63. J Adams (2017) International Research Collaboration after the UK leaves the European Union, Digital Science Consultancy. Available at: www.universitiesuk.ac.uk/policy-and-analysis/reports/Documents/2017/international-collaboration-uk-post-exit.pdf

In association with the Policy Unit at Kings College London, Universities UK has published a position paper on future directions for the UK within the global research environment post-Brexit.[64] The paper raises questions about the extent to which the UK should seek to establish large, comprehensive bilateral agreements with one or two countries, or multiple smaller agreements with different countries, and what the balance should be between existing important research partners such as the US and emerging research powers such as China. It puts forward a number of different scenarios but does not provide answers to these questions, or prioritise specific countries.

It seems likely that, in international educational co-operation as in the commercial sphere, partnerships with European countries, particularly France and Germany, will remain important following our departure from the EU and that the development of new global partnerships will be gradual. However, this uncertainty makes it difficult to predict future language needs.

Because the situation is very complex and difficult to read, we have used three separate sub-indicators of current international co-operation in education: research collaboration as measured by the number of joint publications; inward mobility of international students coming to the UK; and outward mobility of UK higher education students to other countries.

Table 7: International research collaboration

Countries	Languages
United States	English, Spanish also widely used
Germany	German
France	French
Italy	Italian
Australia	English
China	Mandarin
Netherlands	Dutch
Spain	Spanish
Canada	English, French is also an official language
Switzerland	French/German
Sweden	Swedish
Belgium	Dutch/French
Japan	Japanese
Denmark	Danish
Ireland	English/Gaelic
Brazil	Portuguese

Countries with the greatest number of co-authored research publications with UK, 2012–17, and their languages.[65]

Table 8: Inward mobility of international students to the UK

Countries of domicile	Languages
China	Mandarin
United States	English, Spanish also widely used
France	French
Germany	German
India	Hindi, Urdu and other Indian languages
Malaysia	Malay
Nigeria	Igbo, Yoruba, Hausa and others
Italy	Italian
Hong Kong	Cantonese
Spain	Spanish
Greece	Greek

Countries of domicile of the greatest numbers of new students to study at UK higher education institutions, 2015–16 and their languages.[66]

64. Universities UK/Policy Unit, Kings College London (2017) Positioning the UK within the Global Research Environment. Available at: https://www.kcl.ac.uk/sspp/policy-institute/publications/Positioning-the-UK-within-the-global-research-landscape.pdf
65. Data from Scopus, exported 13 June 2017.
66. HESA standard registration data (2017).

Table 9: International mobility of UK students

Destination countries	Languages
United States	English, Spanish is also widely used
France	French
Netherlands	Dutch
Germany	German
Australia	English
Ireland	English/Gaelic
UAE	Arabic
Denmark	Danish
Austria	German
Switzerland	German/French
Spain	Spanish
Czech Republic	Czech
New Zealand	English
Bulgaria	Bulgarian
Hungary	Hungarian
Italy	Italian

Main destination countries of outgoing UK tertiary education students, 2015, and their languages. Includes students undertaking at least nine months' study outside the UK.[67]

The predominance of English in international educational co-operation complicates the use of this data to predict language needs. Outgoing UK students are attracted to courses overseas which run in English – hence the appearance of the Netherlands and Denmark high up the list and the inclusion of Bulgaria and Hungary which have seen big increases in numbers of UK students in recent years. We do not know how leaving the EU will affect such opportunities for UK nationals, but given the high fees charged by UK universities, it is likely that such options could still be attractive. Some outgoing UK students choose countries to go to precisely because of the opportunity to learn or improve languages they are interested in: this factor is likely to account for the large numbers of UK students studying in France, Germany, Spain and Italy.

By the same token, the opportunity to live and study in an English-speaking country is a big attraction for incoming students choosing to study at UK universities. It is likely that English also plays a major role in research collaboration and that it predominates in co-authored publications, but it is difficult to say to what extent and how this varies between countries. What we can say is that international research collaboration will bring UK nationals into contact with people speaking other languages in one way or another, whether through travel, source material or interaction with colleagues.

The presence of foreign nationals in UK universities inevitably creates closer contacts between the UK and these countries, and with increased travel and potentially trade too, we can project an increased interest in, and need to, speak their languages and understand their cultures.

The extent to which English is used is taken into account in Indicator 9 and therefore we have treated all non-English speaking countries equally, irrespective of the likely use of English.

Taking all the data together, we have compiled a master list of the top ten languages likely to be most significant in international education. The results are as follows:

Table 10: Top ten languages for international education

French
German
Mandarin
Dutch
Spanish and Italian (ranking equal)
Danish
Hindi and other Indian languages
Arabic
Malay

67. UNESCO Institute for Statistics, Education, 13 June 2017.

Interim analysis of languages for cultural, educational, diplomatic and security purposes

French, German and Italian have all appeared as more important than previously and Dutch, Russian and Japanese have entered the top ten languages needed for what we have termed 'non-market' purposes. In contrast, Spanish, Arabic and Portuguese have dropped down the table (though Spanish still appears at number two), and Polish, Farsi and Turkish have dropped out – Polish would have been next in line at 11th, tying with Greek and Danish.

Table 11: Languages needed for cultural, educational, diplomatic and security purposes

Languages		2017 scores from indicators 5–8	2013 positions
French	▲	32	Spanish
Spanish	▼	30.5	Arabic
German	▲	24	Portuguese
Italian	▲	22.5	French
Mandarin	–	21	Mandarin
Dutch	▲	13	Italian
Arabic	▼	13.5	German
Portuguese	▼	12.5	Turkish
Russian	▲	9.5	Polish
Japanese	▲	8	Farsi

BALANCING FACTORS

Indicator 9 – Levels of English proficiency in other countries

A total of 72 countries were included in the latest edition of the English First survey, which benchmarks English proficiency.[68] As in our previous study, we have used this data to take into account the extent to which it is possible for the UK to sidestep the requirement to speak another language by using English. We allocated one point for the language of every country with moderate proficiency, two points for low proficiency and three points for very low proficiency.

Between 2012 and 2016, levels of English have improved in some countries, (Chile, Brazil and UAE from very low to low; Indonesia, Taiwan and Vietnam from low to moderate and in Portugal from moderate to high and in Singapore from high to very high). However, levels of English have declined in Iran, Turkey and Qatar (from low to very low), and in Japan from moderate to low. This evidence is important in that it shows that levels of English are not inexorably improving across the world. Arabic and Spanish, which are spoken in a large number of countries where levels of English are relatively low, score highly against this indicator.

Table 12: Levels of English proficiency

Level of proficiency in English	Countries relevant to this study[69]	Languages concerned
Very low	Colombia, Panama, Turkey, Tunisia, Guatemala, Kazakhstan, Egypt, Thailand, Azerbaijan, Sri Lanka, Qatar, Venezuela, Iran, Jordan, El Salvador, Oman, Kuwait, Mongolia, Algeria, Saudi Arabia, Cambodia, Laos, Libya, Iraq	Spanish (5); Turkish (1), Arabic (10); Kazakh, Thai, Azari, Tamil, Singhalese, Farsi, Mongolian, Khmer, Lao (+French)
Low	Russia, Japan, Uruguay, Macau, Costa Rica, China, Brazil, Ukraine, Chile, Mexico, Morocco, Peru, UAE, Ecuador, Pakistan	Russian, Japanese, Spanish (6), Chinese (2), Portuguese, Ukrainian, Arabic (2), Urdu (+Portuguese and French)
Moderate	Slovakia, India, Dominican Republic, Bulgaria, Spain, Bosnia and Herzegovina, South Korea, Italy, France, Hong Kong, Vietnam, Indonesia, Taiwan	Slovak, Hindi/Urdu/Indian languages, Spanish (2), Bulgarian, Bosnian, Korean, Italian, French, Mandarin, Cantonese, Vietnamese, Indonesian.
High	Austria, Germany, Poland, Belgium, Malaysia, Philippines, Switzerland, Portugal, Czech Republic, Serbia, Hungary, Argentina, Romania	German, Polish, French, Dutch, Malay, Tagalog, Portuguese, Czech, Serbian, Hungarian, Spanish, Romanian
Very high	Netherlands, Denmark, Sweden, Norway, Finland, Singapore, Luxembourg	Dutch, Danish, Swedish, Norwegian, Finnish, Chinese, Malay, French, German.

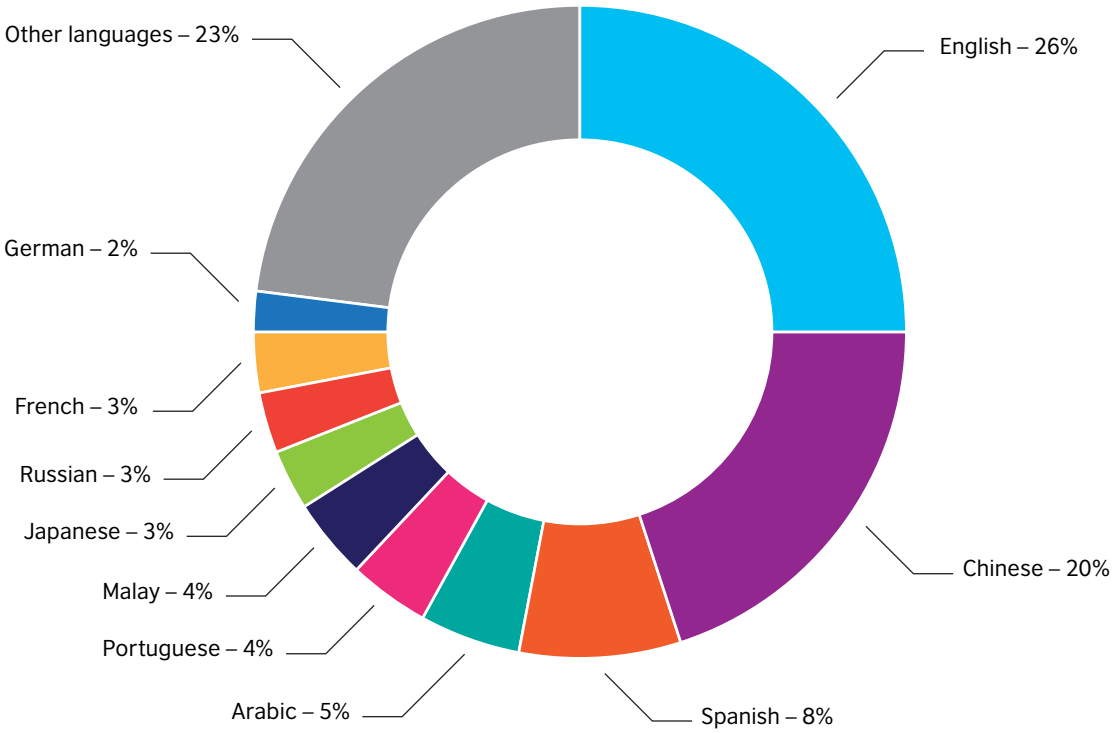
68. English First (2016) *English Proficiency Index*. Available at: www.ef.co.uk/epi/
69. Including only those mentioned in association with other indicators.

Indicator 10 – The prevalence of different languages on the internet

In 2017, Chinese is the second internet language after English, although its share has dropped from 24 per cent to 20 per cent.[70] English has also lost ground slightly, at 26 per cent down from 27 per cent previously, while the share of other languages not specifically named has risen from 18 per cent to 23 per cent, showing that the internet is diversifying linguistically.

Compared to figures used in 2013 from the same source, Korean has dropped out to be replaced by Malay, but all other languages remain in the top ten. Japanese, German and French have moved down the table, whereas Arabic and Russian have moved up.

Chart 13: Internet use by language 2017



Source: Internet World Stats[71]

70. The source does not specify further.
71. Internet World Stats (2017) Internet World Users by Language. Available at: www.internetworldstats.com/stats7.htm

THE TEN MOST IMPORTANT LANGUAGES

Combining the data from all ten indicators resulted in the following ranking, with Spanish as the most important language, followed by Mandarin, French, Arabic and German. Some way behind come Italian and Dutch, followed by Portuguese, Japanese and Russian (see appendix for composite scores).

It is notable that, compared to 2013, the top five languages are the same, although in a slightly different order. Spanish remains the top-scoring language, but Mandarin and French have both overtaken Arabic on the 2017 indicators. Our research reinforces the earlier findings that it is these five languages which are most important for UK speakers. We do not think their order of importance is particularly significant: this is likely to change depending on the weight given to any particular indicator. What is significant is that these five languages score considerably higher than those lower down the table.

In the bottom half of the table, Russian and Portuguese have declined in importance, and Turkish has dropped out. As discussed above, these movements are explicable by changes in the economic and political circumstances in the countries concerned – in the case of Portuguese, Brazil. Italian and Japanese have each moved up a place. This is in part due to the use of trade data on goods and services in this report, as opposed to goods alone in 2013, and the fact that the UK has been very successful in increasing its export services to both Italy and Japan. Dutch has entered the table to replace Turkish, reflecting the large volume of UK trade which passes through Dutch ports, and the proximity and cultural ties between the Netherlands and the UK in tourism, research and academic publishing.

OTHER LANGUAGES

It is not our aim to suggest that the top ten languages identified are the only languages which will be of importance to the UK in the future but to point to those that will definitely be critical over the medium to long term. It is important to consider other languages which may well grow in importance in future, and which scored highly in our analysis, such as Polish, Malay, Turkish, Hindi and other Indian languages.

The position of Polish is due to the large number of Polish speakers in the UK, which results in a high level of travel and interchange, and the potential for the development of UK trade with Poland. The British Chambers of Commerce points out that Poland has one of the fastest growing economies in the EU with a strong domestic market, and was the only European economy to avoid recession between 2008 and 2013.[72]

Table 13: Ten most important languages

2017		2013
Spanish	–	Spanish
Mandarin	▲	Arabic
French	–	French
Arabic	▼	Mandarin
German	–	German
Italian	▲	Portuguese
Dutch	▲	Italian
Portuguese	▼	Russian
Japanese	▲	Turkish
Russian	▼	Japanese

72. British Chambers of Commerce, Market Snapshots: Poland. Available at: http://exportbritain.org.uk/market-snapshots/poland.html
73. Vanita Kohli-Khandekar (2017) 'Republic TV will have to go beyond Arnab to crack the news market', The Wire. https://thewire.in/123344/arnab-goswami-republic-times-now-money/

While not in the top ten, Malay has scored highly as a result of its growing importance on the internet, British Army presence in Brunei, and Malaysia's economic growth and longstanding cultural ties with Britain as a member of the Commonwealth. Malay is closely related to Indonesian, so any competence in the one language would give access to the other.

Turkish has dropped out of our 'top ten' this time, but still ranks highly as a language likely to be important for the UK in the future, given the size and strategic location of Turkey, and the number of speakers.

Indian languages are important because of India's position as the second most populous country in the world and a growing economic and political power. It is easy to over-estimate the importance of English: a recent review of the 390 news broadcasting channels in India, showed that English-language channels account for less than one per cent of the market, reaching four million people a day, compared to Hindi's 117 million.[73] Panjabi, Urdu and Bengali are among the most widely-spoken languages among bilingual children in UK schools, and GCSE and A-level exams exist for these as well as for Gujarati.

CONCLUSIONS AND RECOMMENDATIONS

The vote to leave the EU has given urgency to the UK's quest to be an international trading power beyond Europe, while at the same time highlighting our interconnectedness with the European countries in closest geographic proximity to us.

Our ability to succeed in a competitive global environment and achieve the ambitions of a post-Brexit global Britain – as individuals, as a nation or in business – will be even more dependent on having the right set of skills to engage internationally. Language competence is far more than just another tool in the box; it is a prerequisite and a facilitator for the development of a wide spectrum of other skills and attributes. Without language skills we lose out not only through the restricted ability to communicate internationally, but even more importantly through the closing down of opportunities for overseas work experience, a lack of international business sense, a failure to appreciate that other cultures have different ways of doing things and a potential tendency to overestimate the global importance of British culture.

In 2013, we argued that, while the millions of people around the world learning English provide us with a huge advantage, we had fallen behind by not devoting sufficient time, resources and effort to the learning of other nations' languages. It would be hard to argue that we have made much improvement in the intervening period. Now as in 2013, a lack of language skills and the consequent limited cultural knowledge and international awareness, remain a threat to the UK's economic success, influence and standing in the world, as well as to our citizens' ability to play a meaningful role on the international stage. Meanwhile, there has not been universal progress in the learning of English as a foreign language. Other languages are needed not only for success in the global economy but to build trust, deepen international influence and cultural relationships, and to keep our country safe.

This latest review has confirmed that there are five languages which have the potential to add most to the UK's strategic interests post-Brexit: French, German and Spanish, which are widely taught throughout our education systems, plus Arabic and Mandarin Chinese. These are the same five key languages as identified in our 2013 report. Given that these five languages remain of highest importance to the UK, greater, consistent and systematic effort must be made to increase our capacity to speak and understand them.

Beyond these five languages, there are a number of others, both European and non-European, which we have identified as of particular importance: Italian, Portuguese, Dutch, Japanese and Russian. Turkish will also remain important, though it has dropped out of the top ten in this calculation. Following the Brexit decision, there is no indication that European languages are becoming less important in terms of the top ten languages the UK needs. But further down the list, Malay, Thai, Vietnamese and Indian languages are becoming more important relative to smaller European languages such as Czech. The situation is fluid and above all we need to open up linguistic options and improve our capacity for learning other languages generally.

We need to move on from the mantra that English is 'the' international language of business to understanding more about the importance of other languages and the many varied circumstances in which they are used in addition to or in preference to English.

Our report shows that the UK's departure from the EU is unlikely to entail a reduced need for European languages, while our ambition to forge new trading alliances around the world, and a renewed emphasis on bilateral relationships is likely to require a wide range of languages alongside those which form the basis of our existing language capacity. The vulnerability of language provision in many schools and universities, and the lack of vocational pathways, could further erode the UK's already weak language capability – just at a time when it needs to expand – particularly if it is less easy to recruit native-speaker linguists from abroad in future. The responsibility for addressing this need lies not only with the four UK education departments, but with individuals, business and employers.

Our overall conclusion is **that the UK has now reached a critical juncture where investment in upgrading the nation's language skills is critical.** The capacity of our country's population to engage internationally will be central to strengthening successful economic, political, cultural and people-to-people relationships in Europe and globally in years to come.

We recommend that:

- Now is the moment to initiate a bold new policy to improve foreign language learning for a transformed 'global Britain'. Support for such a policy must be cross-government and cross-party with a focus on sustained improvement in language capacity over the medium to long term.
- Language skills form an integral part of the strategic review of skills that the UK will need post-Brexit, and should take into account any potential loss of linguistic capacity as a result of reduced immigration from Europe and elsewhere. It is crucial that such a review represents the interests of public, private and third sector organisations and that employers and language providers work together to ensure business and organisational needs for language capacity are met.
- Government and business organisations provide better advice to companies on using and managing language skills, particularly as it relates to achieving export-led growth. The linguistic talent present in the UK's diaspora and minority communities should be fully utilised and developed.
- Governments of the four nations of the UK prioritise the teaching of the top five languages identified in this report as consistently important, and take a strategic approach to building capacity in Arabic and Mandarin Chinese alongside French, Spanish and German. There are opportunities to draw on successful practice from the Mandarin Excellence Programme in England and Scotland's China strategy.
- Schools prioritise language learning alongside science, technology, engineering and maths (STEM) subjects and give pupils every opportunity to develop an understanding and appreciation of other languages and cultures.
- Education departments and regulators work together to set and ensure adherence to minimum time requirements for language teaching at primary and secondary level. In Northern Ireland and Wales, they should seek to make language learning statutory in primary schools as it is in England and Scotland.
- Education providers consider the country's future need for international capacity post-Brexit, and specialist expertise in languages, cultures and international issues in our university sector is given strategic protection.
- Further and higher education providers develop, and incentivise take-up of, the offer of languages as additional modules or integrated units within vocational and degree courses.
- Individuals (as parents, young people and adults) consider the need for, and benefits of, language learning, and take responsibility for their own learning using the formal education system, private providers or the plethora of free language teaching resources.
- UK government negotiators protect and prioritise education exchange programmes in EU exit negotiations and guarantee their continuation ideally via the UK retaining full membership of the Erasmus+ programme or if this is not possible then seeking to replicate its benefits through at least equivalent bilateral arrangements.
- The UK government and the devolved governments in Scotland, Wales and Northern Ireland nominate and appoint a Cabinet-level language champion.

ARABIC
العربية

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.

It has official status (sometimes as one of two languages, e.g. in Morocco, Somalia and Israel) in 25 countries: Algeria, Bahrain, Chad, Comoros, Djibouti, Egypt, Eritrea, Iraq, Israel, Jordan, Kuwait, Lebanon, Libya, Mauritania, Morocco, Oman, Palestine, Qatar, Saudi Arabia, Somalia, Sudan, Syria, Tunisia, United Arab Emirates and Yemen. Many of these countries 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 an official language of a number of international organisations including the United Nations, International Criminal Court and the World Health Organization, as well as regional organisations such as the African Union, the Organisation of Islamic Cooperation and the Arab League.

BUSINESS BENEFITS

In 2016, Arabian Gulf countries featured on the list of the UK's top ten non-English speaking export markets with exports of goods and services worth nearly £16 billion.[74] Six further Arabic speaking countries are in the UK's top 50 export markets and the CBI reports that the proportion of businesses citing Arabic as important to their business has increased (26 per cent in 2017 up from 19 per cent in 2012).[75] Significant opportunities exist for British companies, particularly in supporting the vast infrastructure work planned in the region. Arabic-speaking countries among the government's top overseas markets for business development include Bahrain, Oman, Kuwait, Yemen, Iraq, Saudi Arabia, UAE and Tunisia,

ARABIC IN THE UK

Around five or six per cent of English secondary schools teach Arabic, though more usually as an extra-curricular subject. It is also widely taught in the 182 schools belonging to the Association of Muslim Schools and in the supplementary sector.[76]

Arabic was first offered as a GCSE subject in 1995 with 1,182 entries and by 2016 this number had grown to 4,211. A-level Arabic was introduced in 2002 with 299 entries and by 2016 the number of entries had risen to 749. Scottish examinations taken at school level are not available in Arabic.

Arabic is offered at degree level by 16 UK universities as well as a subject of study in over 40 university language centres.[77]

A recent report noted that the recent growth in Arabic learning is almost entirely due to the expansion of Muslim faith schools and that very few non-Muslim children have opportunities to learn the language or be introduced to Arabic-speaking cultures.[78]

INTERNATIONAL CONNECTIONS

Arabic is one of the ten most significant languages for international education. This is in response to economic growth and expanding political influence in a number of countries in the Middle East as well as an increasing interest and investment in education.

A number of UK universities have established a campus presence in Arabic-speaking countries, specifically in the United Arab Emirates. These include Heriot-Watt and Exeter universities and the London and Manchester Business Schools.

Arabic is currently a key language for international diplomatic and security postings. Arabic is both the language of an adversary (ISIS) and the language of host nations and countries where the UK conducts defence engagement. GCHQ is currently recruiting speakers of a number of languages including Arabic.

74. ONS, Balance of payments *op. cit.*
75. CBI/Pearson, *Helping the UK to thrive, op.cit.*
76. Alcantara, *The teaching of Arabic, op. cit.*
77. UCML/AULC, Survey, *op. cit.*
78. Alcantara, *The teaching of Arabic, op. cit.*

WORDS IN ENGLISH WHICH COME FROM ARABIC INCLUDE:

SYRUP
ADMIRAL
CHEMISTRY
ZERO
COFFEE
ALCOVE
MATTRESS

DUTCH
NEDERLANDS

Dutch is a West Germanic language spoken by 23 million people as a first language in most of the Netherlands and around 60 per cent of Belgium.

It is an official language in Suriname and also on the Caribbean islands of Aruba, Curaçao and St Martin. Some five million people speak Dutch as a second language including communities in Africa, South America and the Caribbean. Dutch is closely related to Afrikaans which is spoken in South Africa.

Dutch is one of the official languages of the EU.

BUSINESS BENEFITS

The Netherlands is the third most important non-English speaking export market for the UK after Germany and France with exports of goods and services worth nearly £32 billion in 2015 and those to Belgium, in which Dutch is an official language, worth half as much again.[79] Dutch is the sixth most sought-after language in a 2017 survey of job advertisements requiring language skills, particularly in customer services, IT, sales, finance and marketing.[80]

Dutch is new to the 2017 top ten languages the UK needs, reflecting the large volume of UK trade which passes through Dutch ports, its geographical proximity to the UK and the close collaboration in areas such as research and academic publishing.

DUTCH IN THE UK

In 2016 there were just 128 entries for A-level Dutch, a figure which has been relatively stable for a number of years. At GCSE there were 451 entries in 2016.

Only three universities in the UK offer degree courses in Dutch, all in England. However, one in six British universities offers students the opportunity to learn Dutch as an extra-curricular subject through university language centres.

The Netherlands is an increasingly attractive destination for UK students wishing to study abroad since higher education establishments in the country offer degree courses in English and at a lower cost than universities in the UK.

INTERNATIONAL CONNECTIONS

Dutch people are the sixth most frequent travellers to the UK with over two million visitors in 2016 while those from Belgium (which also include Dutch speakers) are in ninth place with just over one million visitors. Since 2013 the Netherlands has also increased as a destination for British visitors and now ranks as seventh most popular with 2,761,000 outward visitors in 2016.[81]

The English Proficiency Index rates the Netherlands as a country with very high proficiency in English.[82]

79. ONS, *Balance of payments op. cit.*
80. Brinded, *op. cit.*
81. ONS, *Travel Trends, op. cit.*
82. English First, *op. cit.*

WORDS IN ENGLISH WHICH COME FROM DUTCH INCLUDE:

BEAKER
COOKIE
ICEBERG
LANDSCAPE
OFFAL
SNACK
TICKLE
FREIGHT

FRENCH
FRANÇAIS

French is spoken by more than 76 million people as their first language, and a further 100–200 million people around the world are estimated to speak French as a second language.

French is an official language in France, Canada, Belgium, Switzerland, Andorra, Monaco, Haiti, Benin, Burkina Faso, Burundi, Cameroon, Central African Republic, Chad, Comoros, Congo, Côte d'Ivoire, Djibouti, Gabon, Guinea, Mali, Niger, Rwanda, Senegal, Seychelles, Togo and Vanuatu. Varieties of spoken French can vary considerably.

French is an official language of many international organisations including the United Nations, International Criminal Court, World Trade Organization, Universal Postal Union, Organisation of Islamic Cooperation, International Labour Organization, International Olympic Committee, International Telecommunications Union, Inter-parliamentary Union, OECD, African Union, Benelux, Common Market for East and South Africa (and other international African organisations), Council of Europe, European Union, NATO and the Organization for Security and Cooperation in Europe.

BUSINESS BENEFITS

France is the UK's second most important non-English speaking export market, with Belgium and Switzerland also contributing to the £69 billion worth of business in goods and services the UK does with French-speaking markets (2015 figures).[83] These factors now put French in top position as the language most needed based on economic criteria. According to the CBI's latest Education and Skills survey (2017), French remains the language most sought after by those employers looking for language skills (51 per cent).[84]

French is particularly useful as a lingua franca in countries such as Morocco and Cambodia which have a low or very low proficiency in English.[85]

FRENCH IN THE UK

Across the UK, French is the most frequently offered language for study at higher education across all four nations of the UK, with more than 70 universities offering degree courses in French. In spite of the decline in student numbers opting to do languages at school, French remains the language most often studied at A-level, accounting for more than 30 per cent of entries for languages, and Scottish Highers with more than half of all language entries. It also has the greatest number of entries for GCSE and Scottish equivalent exams. At primary level, French dominates with more than 70 per cent of schools offering pupils tuition in French.[86]

France is one of the UK's six top research partner countries and is expected to remain so even after the UK's departure from the EU.[87]

INTERNATIONAL CONNECTIONS

French has long been a key language for diplomacy. Both the Ministry of Defence and the Foreign and Commonwealth Office report that French is an important language for their work. French is important for NATO as well as for the British Army working with coalition partners in Africa in partnership with forces not only from France but also from Francophone African countries where French is the common language (e.g. Chad, Mali). French is a key language for both inward and outward tourism since France is the second most popular destination for people from the UK travelling abroad and the UK's biggest market for incoming tourists. In 2015 there were more than four million visitors from France. Belgium is also in the top ten with more than a million incoming visitors to the UK.[88]

The English Proficiency Index rates France as a country with moderate levels of proficiency in English.[89]

83. ONS, Balance of payments *op. cit.*
84. CBI/Pearson, *Helping the UK to thrive, op, cit.*
85. English First, *op. cit.*
86. Tinsley and Board, *Language Trends* 2016–17, *op. cit.*
87. Universities UK, Global Research Environment, *op. cit.*
88. ONS, Travel Trends, *op. cit.*
89. English First, *op. cit.*

WORDS IN ENGLISH WHICH COME FROM FRENCH INCLUDE:

CAMOUFLAGE
LABOUR
NOISE
CHERISH
MONEY
RIVER
APPETITE

GERMAN DEUTSCH

German is in first place in terms of numbers of native speakers in the European Union with 24 per cent of the EU's 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 and Luxembourg. German is also spoken in Alsace-Lorraine (France), in Alto Adige (Italy) and in Liechtenstein. There are some 1.5 million speakers of German in the United States as well as communities of German speakers in other parts of the world.

German is the tenth most common language on the internet, with more than 84 million users. It is one of the working languages of the EU and an official language of the Organization for Security and Cooperation in Europe.

BUSINESS BENEFITS

Germany is one of the UK's most important trading partners in the world and Wales' greatest export market by far. After the United States, it is the biggest market for our exports (worth over £48.5 billion in 2015) and also the UK's greatest source of imports, meaning that it is the country with which we have the biggest trade deficit. Trade with Switzerland, £21 million in 2015, has grown significantly since 2012 placing it in fifth position in the UK's top ten export markets. Exports to Austria were worth a further £2.6 billion in 2015.[90]

According to the 2017 Education and Skills survey by the CBI/Pearson, German is the second most sought after language in industry with 47 per cent of those businesses requiring languages, citing German as the language they most need. Analysis of one million job postings on the Adzuna website also shows that German is the most lucrative language for the purpose of employment.

GERMAN IN THE UK

Traditionally, German has been the second most widely taught language in the UK. However, in the last 10–15 years it has been overtaken by Spanish. Although German remains the third most widely studied language at A-level/Scottish Higher level, over the last decade it has suffered from severe declines both at this level and also at GCSE/Scottish standard grade. At the level of higher education German remains the third most widely offered language, with 60 universities across the UK offering degree level courses (though there have been some closures of German departments in recent years). A 2016–17 survey of university language centres shows German to be the third most popular language for extra-curricular study by students and also that student numbers in university language centres are increasing. Students cite employability as one of the reasons for taking up German alongside their degree studies.[91]

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. Germany is also one of the UK's top five research partners in the world and is likely to remain so following the UK's departure from the EU.[92]

Real evidence of the significance of German to business and research explains the concerns expressed from time to time by policymakers and academics about the decline of German study in the UK.

INTERNATIONAL CONNECTIONS

Germany is the UK's second most important market for inward tourism, with more than three million Germans visiting the UK in 2015. It is also the sixth most visited country for people from the UK travelling abroad, accounting for 2.7 million visits in 2015. British troops, who have been stationed in Germany since the Second World War are due to be withdrawn from the country by 2020 and the supplementary teaching in the language which is currently given to troops there will therefore cease. However, German will still be needed by the detachments and personnel remaining there to maintain and develop close ties with Germany, and for similar liaison with other German-speaking countries.

90. ONS, Balance of payments *op. cit.*
91. AULC/UCML, Survey, *op. cit.*
92. Universities UK, Global Research Environment, *op. cit.*

WORDS IN ENGLISH WHICH COME FROM GERMAN INCLUDE:

DELICATESSEN
HINTERLAND
PLUNDER
RUCKSACK
COBALT
EIDERDOWN
HAMSTER
SPARERIB

ITALIAN
ITALIANO

Italian is a Romance language with approximately 70 million 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: French, Spanish, Portuguese, Romanian, Catalan, and others and is regarded as the closest language to Latin.

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 United States, UK, Argentina and Australia.

Italian is a working language of the European Union and is an official language of the Latin Union and the Organization for Security and Cooperation in Europe.

BUSINESS BENEFITS

Italy is the UK's sixth largest non-English speaking export market and in 2015 was worth more than £17 billion to the UK economy. Trade in services with Italy has grown by as much as 78 per cent since 2012.[93]

ITALIAN IN THE UK

Italian is the UK's fourth most frequently learned language. It is very popular in adult education and is offered for degree level study in more than 40 universities in England, Scotland and Wales.

Italian is the seventh most popular language at A-level (coming after French, German, Spanish, Mandarin, Russian and Polish) but has fewer than 1,000 entries. At GCSE, Italian is the fifth language after French, German, Spanish and Polish though the numbers of entries are very small (4,943 in 2016). However, whereas French and German have seen significant declines in entries in recent years, entries for Italian remain fairly steady with minor fluctuations.[94]

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.

INTERNATIONAL CONNECTIONS

Italian is very important for both incoming and outgoing visitors. Italy is the third most popular destination for UK tourists after Spain and France with more than four million visitors going to Italy in 2015.[95]

93. ONS, Balance of payments *op. cit.*
94. Data compiled by Alcantara Communications from figures published at www.jcq.org.uk
95. ONS, Travel Trends, *op. cit.*

WORDS IN ENGLISH WHICH COME FROM ITALIAN INCLUDE:

ARCADE
CARTOON
TERRACE
GRAFFITI
REPLICA
CAULIFLOWER
BANKRUPT
MINIATURE

JAPANESE
日本語

Japanese is a language of the East Asia region 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.

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 2015 the value of the UK's exports to Japan was £10.5 billion, making it the UK's tenth largest non-English speaking export market. Trade in services to Japan has grown strongly in recent years.[96]

UK exports to Japan include chemicals, pharmaceuticals, automotive components and cars, electrical machinery and scientific instruments; a number of major British companies, including retailers, operate in Japan. 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 Japanese companies located in the UK employing significant numbers of people in vehicle manufacturing, ICT and the pharmaceutical and healthcare sectors. Japanese companies are highly innovative and Japan is the world's second largest investor in research and development and an important research partner for the UK.

JAPANESE IN THE UK

The number of young people studying Japanese to A-level in the UK is very small with only 236 sitting the examination in 2016. This figure has remained relatively stable over a number of years. However, although 924 pupils took a GCSE in Japanese in 2016, the number of entries has declined by approximately 19 per cent over the past five years.[97]

Japanese can be studied to degree level in 24 universities in England, Scotland and Wales. It is also offered as an extra-curricular subject by language centres in more than 50 British universities, making it the sixth most widely offered language. In terms of popularity amongst students, it ranks fourth.

INTERNATIONAL CONNECTIONS

The English Proficiency Index rates Japan as a country with low proficiency in English.[98]

96. ONS, Balance of payments *op. cit.*
97. Data compiled by Alcantara Communications from figures published at www.jcq.org.uk
98. English First, *op. cit.*

WORDS IN ENGLISH WHICH COME FROM JAPANESE INCLUDE:

EMOJI
KARAOKE
SUDOKO
KIMONO
SUSHI
ANIME

MANDARIN CHINESE
简体中文

Chinese refers to a group of languages with collectively over 1,200 million native speakers. Mandarin Chinese (Putonghua), the language with official status in China, Taiwan, and Singapore, is ranked first in the world with nearly 900 million speakers, mostly in China.[99]

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.

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

BUSINESS BENEFITS

China is the second largest economy in the world and currently the UK's sixth largest non-English speaking export market, with a value of nearly £17 billion in 2015.[100] The CBI reports that the proportion of businesses citing Mandarin Chinese as important has risen from 25 per cent in 2012 to 36 per cent in 2017.

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 European 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, particularly given the UK's decision in 2016 to leave the EU and the intention to develop new international relationships beyond Europe.

CHINESE IN THE UK

China has established a worldwide network of Confucius Institutes to promote Mandarin Chinese and aspects of Chinese culture. The UK has 29 of these institutes located in universities and there is also a growing network of 143 school-based Confucius Classrooms.[101]

Both the Scottish and English education departments are supporting the introduction of Chinese teaching in schools. In Scotland, the work of the Confucius Institute for Scotland's Schools to promote the teaching of Chinese supports a wider five-year strategy to develop Scotland's relationship with China.[102] This has produced increases in the numbers taking National and Higher exams, though actual numbers are quite low. Since the 2016–17 academic year, the Department for Education in England has been funding a new intensive Mandarin Excellence Programme in English secondary schools targeting 5,000 school pupils to put them on track to fluency in Mandarin Chinese by 2020.[103] Entries for Mandarin Chinese at A-level stood at 2,849 in 2016, and at GCSE, entries have increased from 2,541 in 2012 to 4,044 in 2016.

Chinese is available at degree level in 39 universities in England, Scotland and Wales. Currently it is also offered as a subject of study by more than 60 university language centres.[104]

INTERNATIONAL CONNECTIONS

With the rapidly changing international picture and the UK's decision to leave the EU, new languages are becoming strategically important to the UK as it works to redefine its international relationships. Tourism will become increasingly important as the travel patterns of the rapidly increasing middle classes of both China and India change. There will be a need to understand the desires and motivations of travellers from these two countries in order to capitalise on the value of these markets.[105]

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.

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

99. Data from www.ethnologue.com
100. ONS, Balance of payments *op. cit.*
101. http://english.hanban.org/node_10971.htm
102. www.gov.scot/Publications/2012/12/7734
103. https://www.britishcouncil.org/education/schools/support-for-languages/partnerships-courses-resources/mandarin-excellence-programme
104. UCML/AULC, Survey, *op. cit.*
105. European Travel Commission (2014) Target Market: China. Available at: http://ec.europa.eu/DocsRoom/documents/15746/attachments/1/translations/en/renditions/native

WORDS IN ENGLISH WHICH COME FROM CHINESE LANGUAGES INCLUDE:

KETCHUP
KOWTOW
LYCHEE
FENG SHUI
TEA
TYPHOON
WOK

PORTUGUESE
PORTUGUÊS

Portuguese has some 219 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-Principe and Timor-Leste. European 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 a working language of the European Union and is also used in the following international organisations: Organization of Ibero-American States, African Union, Common Market for Eastern and Southern Africa, Economic Community of West African States, Organization of American States, Southern African Development Community and the Union of South American Nations.

BUSINESS BENEFITS

Brazil is the ninth largest economy in the world, accounting for 34 per cent of South America's GDP and with significant regional importance in trade negotiations. Although the Brazilian economy has not developed as leading economists forecast several years ago, its potential is nevertheless vast and should not be overlooked.

Although the EU is Brazil's largest trading partner, the UK–Brazil bilateral trade and investment relationship is underdeveloped, perhaps partially due to Brazil's recent internal economic challenges. There are opportunities to build on successful UK–Brazil scientific collaboration to date, including in the areas of pharmaceuticals and energy.

Portugal is an established trading partner of the UK and about 80,000 British citizens live and work there for some of the year. Strong ties with Portugal are seen as a gateway for the UK into a Lusophone market of 250 million people.[106]

PORTUGUESE IN THE UK

The numbers of young people studying Portuguese at A-level and GCSE are very small (444 for A-level and 2,341 for GCSE in 2016).[107] Portuguese is not widely taught at degree level although 24 universities across the UK offer degree courses.

INTERNATIONAL CONNECTIONS

The rise of emerging powers including Brazil, their potential and their ability to substantially influence political and commercial negotiations increases the need for diplomats and businesses to be able to operate in their languages.

Portugal was the sixth most popular holiday destination for outgoing tourists from the UK in 2015 with 2.8 million visits.[108]

The English Proficiency Index rates Brazil as a country with low proficiency in English, and Portugal as having high proficiency.[109]

106. Department for International Trade (2015) *Doing business in Portugal.* Available at: https://www.gov.uk/government/publications/exporting-to-portugal/doing-business-in-portugal-portugal-trade-and-export-guide
107. Data compiled by Alcantara Communications from figures published at www.jcq.org.uk
108. ONS, *Travel Trends, op. cit.*
109. English First, *op. cit.*

WORDS IN ENGLISH WHICH COME FROM PORTUGUESE INCLUDE:

BAROQUE
CARAMEL
BUFFALO
LAUNCH
MARMALADE
MONSOON
EMBARRASS
CASHEW

RUSSIAN
РУССКИЙ

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

It 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, Organization for Security and Cooperation in Europe and the Shanghai Cooperation Organisation.

BUSINESS BENEFITS

As one of the so-called BRIC countries, Russia was identified a few years ago as one of the four emerging world powers whose economy was growing extremely fast. However, a combination of low global oil prices and economic sanctions following Russia's annexation of Crimea led to a serious decline in the value of the rouble in 2014–15. The serious downturn in the Russian economy saw the value of the UK's exports to Russia decline by around 50 per cent during this period. The value of our exports to Russia in 2015 amounted to £5.6 billion.[110]

RUSSIAN IN THE UK

In 2016 there were over 1,232 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.[111] There were nearly 2,300 entries for Russian GCSE in 2016. This also shows a steady increase over ten years. These figures place Russian in tenth place in terms of entry numbers for languages at GCSE and in fifth place for A-level.

Russian can be studied to degree level in 20 universities in England and Scotland (but not in Northern Ireland or Wales). More than 50 per cent of university language centres offer Russian as an extra-curricular study.

INTERNATIONAL CONNECTIONS

The English Proficiency Index rates Russia as a country with low proficiency in English. Russian declined in importance for security purposes after the end of the Cold War but is now coming to the fore again.[112]

110. ONS, Balance of payments *op. cit.*
111. Tinsley and Board (2016) Language Trends 2015–16, British Council/Education Development Trust, page 40.
112. English First, *op. cit.*

WORDS IN ENGLISH WHICH COME FROM RUSSIAN INCLUDE:

TUNDRA
MAMMOTH
SOVIET
SAMOVAR
TROIKA
COSMONAUT
INTELLIGENTSIA

SPANISH
ESPAÑOL

Spanish is the second most widely spoken first language in the world with approximately 437 million native speakers.

It 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 and Spain and is also an official language of Puerto Rico.

Mexico has over 20 per cent of all first language Spanish speakers, while the United States, with 30–40 million native speakers of Spanish, is the country with the largest Spanish speaking minority. 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 Organization, International Labour Organization, International Telecommunications Union, Latin Union, African Union, Central American Common Market, European Union, Mercosur, North American Free Trade Agreement (NAFTA), Organization for Security and Cooperation in Europe, Organization of American States and the Union of South American Nations.

BUSINESS BENEFITS

Spain is the UK's eighth largest non-English speaking export market, valued at nearly £15 billion in 2015.[113]

With a combined population of over 185 million people, Chile, Colombia and Mexico have all been identified as opportunity markets for the UK, and the three countries all have low or very low proficiency in English.[114] Mexico is one of the most open trading nations in the world, with an extensive network of bilateral trade agreements and is projected to become the world's seventh-largest economy by 2050.[115] The UK is the fifth largest investor in Mexico.

Forty-five per cent of respondents to the 2017 CBI/Pearson Education and Skills survey cited Spanish as useful for their business, up from 37 per cent in 2012.[116] The CBI comments that the UK has maintained a trade surplus with South America since 2011 and that there is further scope to build on that record.[117]

SPANISH IN THE UK

Spanish is now the second most popular language at A-level after French, having overtaken German in 2005. With 8,460 entries in 2016, an increase of 32 per cent in ten years, it is the only language to buck the trend of year on year decline. It is also the second most popular language at GCSE with more than 92,000 entries in 2016. In Scotland, the number of entries for Spanish in all school level examinations also continues to grow while entries for other European languages decline.

Spanish is offered at degree level by 70 universities across the whole of the UK and has seen fewer departmental closures than other languages. A survey of institution-wide language provision in universities carried out in 2016, showed Spanish to be the most popular language among student learners.[118]

INTERNATIONAL CONNECTIONS

Spain is the most popular destination for people from the UK, with more than 14 million visitors in 2015. Tourists from Spain to the UK are now the third largest non-English-speaking group, after visitors from France and Germany, with numbers increasing annually by an average of 4.6 per cent.[119]

113. ONS, *Balance of payments op. cit.*
114. See British Chambers of Commerce: www.exportbritain.org.uk
115. British Chambers of Commerce, *Market Snapshots: Mexico.* Available at: http://exportbritain.org.uk/market-snapshots/mexico.html
116. CBI (2012) *Learning to grow,* Education and Skills survey 2012, page 57.
117. CBI/Pearson, *Helping the UK to thrive, op, cit.*, page 34.
118. UCML/AULC, Survey, *op. cit.*
119. ONS, *Travel Trends, op. cit.*

WORDS IN ENGLISH WHICH COME FROM SPANISH INCLUDE:

RENEGADE
TOBACCO
STAMPEDE
FLOTILLA
BONANZA
BOLERO
AVOCADO

APPENDIX

MATRIX OF LANGUAGE INDICATORS WEIGHTINGS AND SCORES

LANGUAGES	TOTAL	INDICATOR 1: CURRENT UK EXPORTS	INDICATOR 2: THE LANGUAGE NEEDS OF UK BUSINESS	INDICATOR 3: UK GOVERNMENT'S FUTURE TRADE PRIORITIES	INDICATOR 4: EMERGING HIGH GROWTH MARKETS
Spanish	64.5	4	8	3	1
Mandarin	59	6	7	3	4
French	57	9	10	3	
Arabic	50.5	5	6	6	2
German	47	10	9	2	
Italian	30.5	7		1	
Dutch	26.5	8	4	1.5	
Portuguese	22.5			1	
Japanese	20	3	3	1	
Russian	15.5		1.5	0.5	
Polish	14		5	1	4
Malay	12			1	4
Turkish	10			1	4
Hindi and other Indian languages	8.5			2	4
Thai	7			1	4
Farsi (Persian)	6			1	
Cantonese/other Chinese languages	5.5	1	1.5	1	2
Danish	5			1	
Indonesian	5			1	4
Greek	4				
Korean	4			1	
Vietnamese	4				4
Other African languages	3			1	2
Azari	3			1	
Kazakh	3			1	
Mongolian	3			1	
Swedish	3	2		1	
Urdu	3			1	
Khmer	2				
Lao	2				
Singhalese	2				
Swahili	2			2	
Tamil	2				
Finnish	1			1	
Lithuanian	1			1	
Norwegian	1			1	
South African languages	1			1	
Tagalog	1			1	
Ukrainian	1			1	
Armenian	0.5			0.5	
Bengali	0.5			0.5	
Czech	0				
Pashto	0				
Other Indian					2
Yoruba/Nigerian languages	1				1
Total	516	55	55	48	42

INDICATOR 5: DIPLOMATIC AND SECURITY PRIORITIES	INDICATOR 6: THE PUBLIC'S LANGUAGE INTERESTS	INDICATOR 7: OUTWARD VISITS FROM THE UK	INDICATOR 8: UK GOVERNMENT'S INTERNATIONAL EDUCATION STRATEGY PRIORITIES	INDICATOR 9: LEVELS OF ENGLISH PROFICIENCY IN OTHER COUNTRIES	INDICATOR 10: THE PREVALENCE OF DIFFERENT LANGUAGES ON THE INTERNET
5	10	10	5.5	9	9
7	6		8	8	10
5	8	9	10		3
7	4		2.5	10	8
3	7	5	9		2
	9	8	5.5		
		6	7		
3	2.5	7		2	7
3	5				5
7	2.5				4
	1	3			
			1		6
3				2	
			2.5		
				2	
3				2	
			4		
		4			
3					
				2	
				2	
				2	
				2	
				2	
				2	
				2	
				2	
49	55	52	55	51	54

As already stated at various points in the body of this report, the aim is less about providing a definitive answer to the research question, and more about stimulating debate and more strategic thinking about the value and use of foreign language skills. The choice of indicators and the weight given to each is based on judgement and practicality.

Other researchers, with different perspectives and at different points in time, may regard alternative indicators as more appropriate. For the purposes of transparency, the following explanatory notes are provided.

We have worked with a total of 516 points, of which 200 relate to pure economic factors (indicators 1–4), 211 relate to diplomatic, cultural and security factors (indicators 5–8) and 105 relate to balancing factors (indicators 9 and 10).

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

INDICATOR	EVIDENCE BASE	SCORING
1.	Balance of payments figures published by the Office of National Statistics.[120]	The languages of the top ten non-English speaking countries have been awarded a total of 55 points, starting with 10 for the most important (German), 9 for the next (French) and so on.
2.	Languages rated as useful according to the CBI/Pearson Education and Skills survey 2017.[121]	A total of 55 points have been awarded, starting with 10 more the language regarded as most useful (French), 9 for the next most useful (German), etc.
3.	Languages of countries targeted by the Department of International Trade.[122]	A total of 48 points was allocated, one for each country mentioned, plus 0.5 of a point where a second language is strong.
4.	Report by the Centre for Economics on Business Research on opportunities for SMEs post Brexit.[123]	42 points were shared between the languages of 10 countries highlighted in the report.
5.	Interviews with MOD and FCO staff, plus desk research.	A total of 49 points was allocated across the two levels of priority languages established by the FCO, incorporating information from GCHQ recruitment.
6.	Languages in which there is grassroots public interest in learning, as measured by the existence of part-time evening classes.[124]	A total of 55 points was allocated to the top ten languages, starting with 10 for the most widely-offered (Spanish), 9 for the next (Italian), etc.
7.	Languages associated with countries that receive the most visitors from the UK.[125]	52 points were distributed between the top eight non-English speaking destinations, starting with 10 for Spain, 9 for France, etc.
8.	Figures on international co-operation in education: research collaboration as measured by the number of joint publications, inward mobility of international students coming to the UK and outward mobility of UK higher education students to other countries.[126]	A composite top ten of languages was identified from the three sources used, and a total of 55 points allocated, starting with 10 for the most significant language (French), 9 for the next (German), etc.
9.	Languages spoken in countries with lower levels of proficiency in English, as measured by the English Proficiency Index.[127]	One point was awarded for the language of every country with 'moderate' proficiency, two points were awarded for 'low' proficiency and three points for 'very low' proficiency, producing a list of 15 languages with 3 or more points, amongst which 51 points were allocated to carry over into our ranking. The languages of countries with 'high' or 'very high' levels of English were not awarded any points.
10.	Presence of languages on the internet as measured by Internet World Stats.[128]	A total of 54 points was distributed among the nine languages (excluding English) which have the greatest presence on the internet, starting with 10 for the most prevalent (Mandarin Chinese), 9 for the next (Spanish), etc.

120. ONS Balance of Payments and annual geographical tables, published February 2017: https://www.ons.gov.uk/economy/nationalaccounts/balanceofpayments/adhocs/006656balancеofpaymentsannualgeographicaldatatables
121. CBI/Pearson (2017) Helping the UK to thrive. Education and Skills Survey.
122. Department for International Trade (2017) '2017 must be the 'Year of Exporting', news release, 9 January 2017.
123. Centre for Economics and Business Research (2016) Thinking Global, the route to UK exporting success, World First, October 2016.
124. www.hotcourses.co.uk
125. ONS 'Travel trends': Top 10 countries visited by UK residents, 2016.
126. British Council sources, see pages 25, 26.
127. www.ef.co.uk/epi/
128. www.internetworldstats.com/stats7.htm

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