

RLN DATA AND RESEARCH



**LANGUAGE SKILLS  
NEEDS IN  
YORKSHIRE AND  
THE HUMBER  
ENGLAND**

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## INTRODUCTION

*"The global economy is changing rapidly, with emerging economies such as India and China growing dramatically, altering UK competitiveness...There is a direct correlation between skills, productivity and employment. Unless the UK can build on reforms to schools, colleges and universities and make its skills base one of its strengths, UK businesses will find it increasingly difficult to compete."*

*Leitch Review of Skills (HMSO, 2006)*

According to CILT, The National Centre for Languages and others, the failure to recognise and address language and cultural barriers means that companies in the United Kingdom (UK) are losing business and falling behind in the exploration of new markets. Furthermore, UK nationals are disadvantaged on the international jobs market when compared to their non-UK counterparts. It is identified that in this increasingly globalised economy, UK businesses can no longer afford to rely on English as the international lingua franca.

Languages have been recognised at a strategic level as crucial to the UK's international competitiveness and as key requirements of the current and future workforce. However, research shows that employers, particularly small to medium sized enterprises (SMEs), do not report or recognise skills gaps until they look towards product improvement or market expansion (CILT, 2007).

**UK businesses can no longer afford to rely on English as the international lingua franca**

In order to effectively address these issues, it is important to assess the language and cultural skill needs of the regional economy. The Regional Economic Strategy (RES) has a specific objective to: 'use evidence on skills and economic needs to guide action' (p. 70) to ensure learning and skills resources are invested where they will make most difference.

The identification of skills gaps in the current workforce, as well as future skill needs can help local education and training suppliers to assess market requirements to support their business development. The information can also be utilised to generate interest in and to help increase the regional take-up in language learning etc.

The successful matching of supply of and demand for skills in languages other than English within the region is essential in tackling international language and communication barriers.

This bulletin draws together evidence of language skills needs in the Yorkshire and The Humber Government Office Region (YH GOR). It includes relevant data and other information e.g. research publications and anecdotal evidence. Information

on the national picture is also included, as wider skills needs should be incorporated in regional skills training and development planning.

A range of labour market intelligence (LMI) sources are presented, starting with Regional Language Network Yorkshire and The Humber (RLN YH). Key points are then drawn together to provide an overview of regional language skills needs.

It is anticipated that a subsequent bulletin will provide an examination of supply-side regional language skills to assess the extent to which they currently meet identified needs.

## NATIONAL OVERVIEW

Whilst a range of factors such as sector and occupation determine which languages are required, evidence from the UK regions establishes the following priority order:

- *French, German, Spanish, Italian*
- *Arabic, Mandarin Chinese, Russian*

Additionally, research shows that intercultural skills, whether for export trade or working with a diverse workforce are also high priority in terms of skill requirements.

To date, there is no evidence to the contrary, which is unsurprising as language requirements are likely to be determined to a great extent by patterns of UK international export trade including tourism (CILT, 2007).

A recent survey indicates that foreign languages are growing in importance as UK firms increasingly operate in a global marketplace and conversational skills are the key - 75% of firms want conversational ability, with only 25% requiring full fluency.

Unsurprisingly, European languages are the focus for current recruitment, with French and German the most popular languages. Spanish is also a valuable language, particularly for companies moving into Latin America. 43% of employers who are interested in language skills need Mandarin/Cantonese speakers (CBI, 2008).



**European languages are the focus for current recruitment but 43% of UK employers interested in language skills need Mandarin/Cantonese speakers**

### **High Growth Markets Programme**

The High Growth Markets Programme, run by UK Trade & Investment (UKTI), encourages the internationalisation of UK companies by providing advice to selected firms with the potential to enter or expand in target high growth markets.

UKTI has prioritised the following 17 markets for the programme:

- Brazil
- China
- India
- Indonesia
- Malaysia
- Mexico
- Qatar
- Russia
- Saudi Arabia
- Singapore
- South Africa
- South Korea
- Taiwan
- Thailand
- Turkey
- UAE
- Vietnam

### **Specialist Language Sectors**

For the conference interpreting, commercial interpreting and commercial translation sectors, the languages indicated above predominate. However, the increase in demand for less widely available languages is more acute than in broader non-specialist sectors.

In terms of public sector interpreting and translation, there has been a discernible shift in the UK's demography and demand for Urdu, Farsi, Polish and the languages of Central Europe, are much in demand (CILT, 2007).

There is an acute shortage of public service interpreters in most languages, and in particular British Sign Language: *"Interpreter demand far exceeds supply. There is a chronic shortage of appropriately qualified British Sign Language/English Interpreters"*.



***There is an acute shortage of public service interpreters in most languages in particular British Sign Language***

Additionally, in every branch of the specialist language professions there is a recognized crisis point shortage of English native speakers with the language skills, education and professional qualifications and experience to work from other languages into English (ibid.).

Specific skills needs identified within the sector are:

- Context-specific language, such as business or public-sector terminology;
- Customer or client service skills;

- Ability to use computer-aided translation systems;
- Cultural understanding.

Research also indicates that there are individuals working in the sector who do not have the full set of abilities needed (Stratagia Ltd, 2008).

### **Sub-national differences and commonalities**

- Accessing translation and especially interpreting services and working in the sector is particularly difficult in rural areas;
- Providing the particular languages required in remote locations and possibly at unsocial hours is particularly challenging;
- Demand for particular language skills is no longer confined to ports and other urban centres; economic imperatives and Government dispersal policy mean they can arise almost anywhere at any time.

### **Key Drivers in the Interpreting and Translation Sectors**

Key drivers for demand in the sector have been identified as follows:

- Developments in, and particularly expansion of, the European Union (EU);
- Policy decisions relating to the dispersal of immigrants. The emergence of inward migration creates particular problems. Impact can be greater because services are less prepared for and find it more difficult to meet new language needs;
- Many providers of public services are required by equality legislation to ensure their services and information are available to all groups in the community and this is driving demand for interpreting and translation services;
- Changes in the extent and character of international trade are also affecting the demand for interpreting and translation services. There is reportedly remarkable annual growth rates for the period 1999-2006 in UK exports to Dubai (17.3%), China (13.2%) and Poland (11.3%) and in imports from China (20.4%), Russia (19.9%), Norway (18.7%) and Turkey (15.4%);
- The demand for more Chinese speaking interpreters and translators can be expected to grow considerably in the next few years especially since English-speaking amongst Chinese business people is not thought to be as common as in other East Asian countries;
- Further stimulus may come from progress with the accession to the European Union of Turkey, Albania and the states and provinces once part of the former Yugoslav Republic.

**The demand for more Chinese speaking interpreters and translators can be expected to grow considerably in the next few years**

## THE REGIONAL PICTURE

The third objective of the Regional Economic Strategy (RES), **'Skilled People benefiting business** –with talents that employers value and which offer due reward', is a key strategic driver for the regional skills agenda.

Within the Skilled people objective six priorities have been identified including improving the skills of people already in work and the potential workforce, improving higher level skills to capture the potential of people with degrees and using evidence on skills and economic needs to guide action.

Business sector growth priorities have been identified as:

- Advanced Engineering and Metals
- Digital and New Media Industries
- Food and Drink
- Environmental Technologies
- Healthcare Technologies

The Yorkshire and the Humber Regional Skills Partnership (RSP) are committed to bringing together the key agencies and sectors in the region to:

- Work in partnership;
- Give collective leadership to the skills agenda in Yorkshire and The Humber ;
- Improve skills outcomes and productivity on a demand-led basis for the region, aligned with the Regional Economic Strategy (RES).

In addition, the RSP key strategic themes are:

- **Employability:** to enhance the employability of individuals by giving them the skills to take up employment opportunities including improving skills for life and job readiness;
- **Higher Level Qualifications:** to promote, develop and deliver the up-skilling of those in employment through higher level skills training and development in line with labour market needs, (designed to deliver a highly productive workforce);
- **Business Support:** to refine and develop the offer to employers, providing integrated business support in response to customer needs designed to deliver the skills that they need to enhance business productivity and growth.

## REGIONAL LANGUAGE NETWORK YORKSHIRE AND THE HUMBER (RLN YH)

### LANGUAGE SKILLS CAPACITY AUDIT (YORKSHIRE AND THE HUMBER, 2001)

This survey found that within the Yorkshire and The Humber at the time:

- 52% of 'international' companies (companies involved in export trade) regularly use foreign languages. The apparently lower percentage of respondents using foreign languages in this study may reflect the poorer export performance at the time or may just reflect an accurate baseline;
- The main languages in use are French, German, Spanish and Italian (see Table 1);
- The survey also reveals small, but significant use of a number of languages from the Indian sub-continent and adjoining regions (e.g. Pakistan);

**Table 1: Languages in Regular Use by RLN Audit Respondents (2001)**

| LANGUAGE         | % YH OF COMPANIES |
|------------------|-------------------|
| FRENCH           | 40.9              |
| GERMAN           | 32.0              |
| SPANISH          | 18.6              |
| ITALIAN          | 10.4              |
| DUTCH            | 4.0               |
| CHINESE          | 3.7               |
| CENTRAL EUROPEAN | 3.7               |
| PORTUGUESE       | 2.7               |
| JAPANESE         | 1.5               |
| ARABIC           | 1.5               |
| SWEDISH          | 1.2               |
| INDIAN (VARIOUS) | 1.2               |

Note: Percentages will sum to more than 100%, because of multiple mentions by individual companies

- France and Germany are the key markets. However, the Netherlands is an export 'destination' that has developed substantially in recent years;
- Spain is the sixth most important market in the sample, in regular use in trade with both Spain and Latin America;
- Italy is the fourth destination and is a key market which has grown in recent years. However, Italian language skills are not as prevalent as the importance of the market itself suggests;
- The Middle East, Scandinavia and the Baltic area are also important markets for the region. However, the comparatively low level of usage of associated languages tends to support the view that English is in widespread use in those areas;
- Central Europe represents an important and, in overall terms, growing market, which for optimal exploitation will require related language and cultural skills

development. The eastward development of the EU itself within the next decade makes these markets all the more important: competition within them to provide goods and services will only increase;

- In the Far East, S.E. Asia is a key export destination. The Chinese market is growing significantly. However, the extent of Chinese language skills in the region – and related cultural understanding – is very limited;
- The other potential market is the Russian Federation. However, its poor economic stability (and effective legal infrastructure) makes it relatively unattractive currently – especially for the smaller UK and regional company;
- Skills gaps are identified for all languages, with the possible exception of French. In particular, it is believed that potential growth could be achieved with access to Chinese language and skills;
- 41% of respondents reported that they had encountered language barriers in their international business dealings;
- The top languages causing barriers to trade are French, German, Spanish, Chinese and Italian. The rise of Chinese is noticeable. Chinese now compares with Italian as being the fourth most important language to cause language barriers;
- Japanese, Russian and Arabic are also identified as barriers to trade;
- 20.4% of respondents report having encountered cultural barriers in their international trade dealings. Japan, China, the Middle East and South East Asia are reported to cause the most barriers to trade in terms of cultural understanding;
- In Europe, France and Germany continue to figure as countries where cultural problems are found, reflecting no doubt the volume of trade with these two countries;
  - just over 20% of respondents reported a loss of business as a result of the lack of language skills or cultural knowledge;
  - 47% of respondents in the current survey indicated that they had plans to begin trading in new non-English speaking markets;
- The country/region was undefined for 15.6% but where this was specified, Vietnam, South East Asia, Turkey, Thailand and Taiwan were cited most often;
- Over 65% see the need for future language training, mainly in French, German, Spanish and Italian, with a small number identifying Japanese, Chinese and Portuguese.

**France and Germany are the key regional export markets but the Netherlands is an export destination that has developed substantially**

**Potential export growth could be achieved with access to Chinese language and skills**

### NORTHERN LANGUAGE SURVEY (RLN D&R, 2007)

Although this is essentially a supply-side survey, the focus is on languages at work, so the languages specified by respondents are in use within the regional economy and provide an indication of current skill requirements.

Analysis of the data in terms of the Yorkshire and The Humber indicates that:

- 56% of respondents use their languages skills (other than English) at work;
- The main European languages spoken by YH respondents (and therefore, likely to be used at work) are French (82%), German (52%), Spanish (50%) and Italian (30%);

In terms of non-European languages, the sample sizes are quite small and this should be borne in mind when considering the findings:

- Asian languages are spoken by 32% of Yorkshire and The Humber respondents. Japanese and Mandarin are the top two Asian languages spoken in the region;
- 25% speak Middle Eastern languages – Arabic, Turkish and Hebrew are the most prevalent;
- Just under a quarter speak African languages (24%), with Afrikaans and Swahili the most popular.

English is the main mother tongue/native or first language of respondents, followed by:

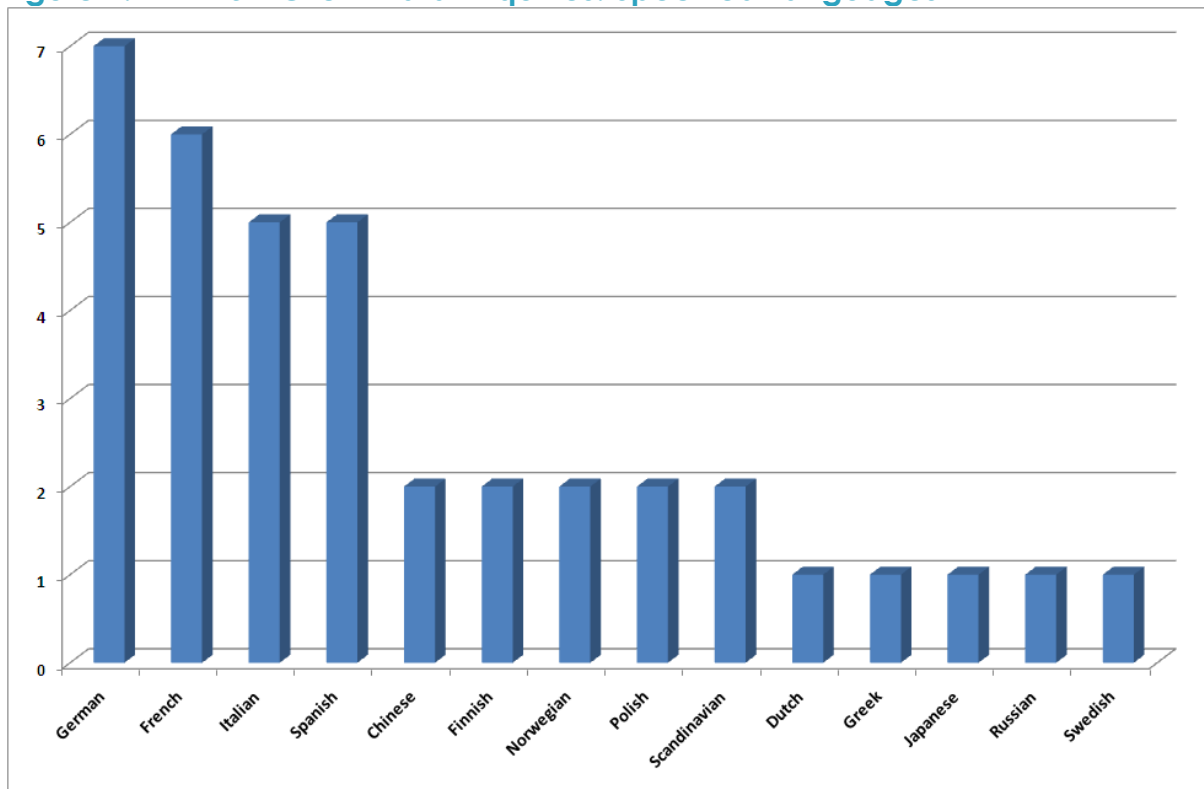
- |           |            |            |
|-----------|------------|------------|
| 1. French | 4. Polish  | 7. Arabic  |
| 2. German | 5. Punjabi | 8. Urdu    |
| 3. Dutch  | 6. Spanish | 9. Italian |

### REGIONAL DATA ENQUIRIES (2005-2008)

Since October 2005, RLN Data and Research (RLN D&R) has received 31 enquiries specific to Yorkshire and The Humber regarding language skills in the area. The internal data held on these enquiries shows the following:

- 12 (39%) specified the actual languages required (one enquiry requested Scandinavian data);
- Figure 2 shows the languages required by clients requesting information on language skills in the Yorkshire and The Humber over the past three years;
- In total, 13 languages were requested plus Scandinavian;
- German is the language for which data was most often requested, followed by French, Italian and Spanish.

**Figure 1: RLN D&R Client Data Enquiries: Specified Languages**

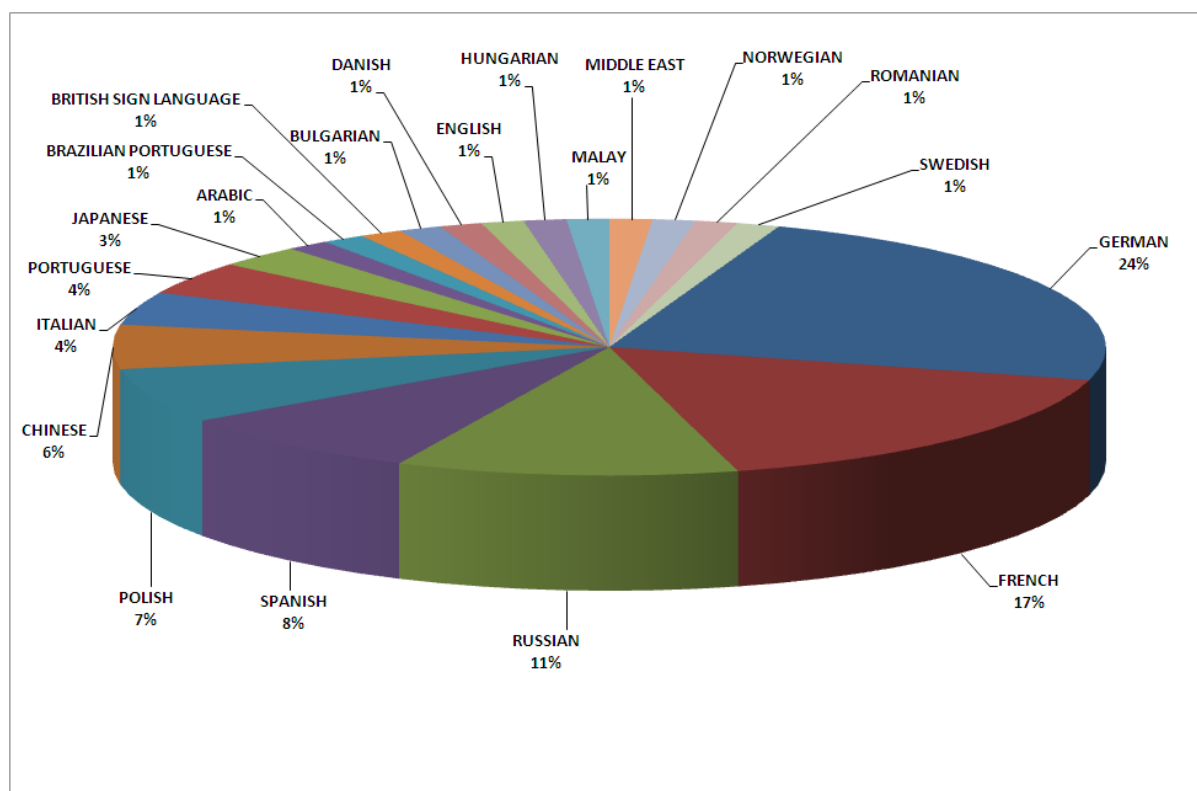


REGIONAL COMPANIES ASSISTED (NOV 2006- JAN 2009)

An internal database of companies in the region who have requested assistance from RLN YH Ltd regarding language services was analysed to identify specific languages required. The analysis shows:

- 117 regional companies were assisted with language service needs between November 2006 and January 2009;
- 55% stated the language/s with which they required assistance;
- German was required most often (23%), followed by French, Russian, Spanish, Polish and Chinese (see Figure 2);
- In total, 21 different languages were required including British Sign Language (BSL) and English.

**German is the language for which business support and data is most often requested from RLN YH**

**Figure 2: RLNYH Ltd Business Assists: Specified Languages**

## EMPLOYER SURVEYS

### The Labour Market Context

- There were 139,940 businesses in the Region in 2006, a rise of 10% since 2001;
- Wholesale, retail and repairs (24.1%) and Real Estate, renting and business activities (24.5%) are the sectors that have the largest number of businesses;
- Forecasted industrial trends to 2015 suggest that the declining manufacturing employment trend will continue. Banking & Insurance, Business Services, Other Financial & Business Services and Health will expand, but a number of the traditional service sector employment generators (e.g. Public Administration and Health) will experience decline;
- The forecasts do not take into account potential new employment generation projects within the Region which may reverse/improve some of these forecasted trends. For instance it has been estimated that regeneration activities within South Yorkshire could create up to 15,000 new jobs by 2013;
- Neither do the forecasts take into account the recent decline of the UK economy. It is likely that this will have a negative impact across all industries (LSC, 2008).

## Employers' Skills Needs

### Recruitment difficulties, skills gaps and shortages

- In contrast to the national trend in 2006, there had been a marked fall in the proportions of regional employers experiencing difficulty filling vacant posts (6% of employers reported skills shortages);
- A fall was also seen in the proportion whose difficulties are considered by employers to be caused by a lack of the available skills in the labour market (3% of employers reported a lack of available skills in the labour market);
- These decreases moved the region from being the worst performing to a point where there is only one region in a better position;
- Skills gaps affect 14% of employers in Yorkshire and the Humber - the lowest proportion in the country;
- A smaller minority of the regional workforce (5%) were affected by skills gaps in the region compared to nationally (6%);
- At the time, it was stated that language learning may be best described as a learning need, not a learning demand;
- A majority of companies stated they did have use for language skills, but most could accommodate the need from their existing staff (LSC, 2007);

**Skills Gaps/Shortages**  
*The region has moved from worse performing to a point where there is only one region in a better position*

By 2008, the regional situation on skills gaps and shortages had improved:

- The proportion of employers affected by these proficiency problems has decreased considerably, taking the region from worst to joint-best performing (over the two years to 2007), with the proportion of the workforce lacking proficiency also on the decline (LSC, 2008).

### Languages

According to the regional strategic analysis:

- 3% of Yorkshire and the Humber employers cite foreign languages as skills in need of improvement within the next 12 months (down from 5%);
- 9% consider foreign languages to be a skills gap in their current workforce (up from 6%);
- The region contains significant numbers of adults for whom English is a second or third language. They often take up employment in less skilled occupations relative to their actual skills levels. An identified barrier to progress in the labour market for some is their level of English language skills;
- Regional employers consistently fail to endorse the foreign language skills needs. It is suggested that greater awareness of the subject needs to be addressed with employers in order to stimulate this area of learning, as

currently language learning may be best described as a learning need, but not a learning demand (LSC, 2008).

### Future demand

The language and cultural needs of local immigrants including asylum seekers and migrant workers are a key driver in determining future needs in the interpreting and translating sector:

- Yorkshire and The Humber is the English region with the highest percentage of asylum seekers living in supported accommodation (21%);
- Leeds is one of the local authorities with the most dispersal accommodation in the country;
- There is a strong need for English for speakers of other languages (ESOL), particularly in West Yorkshire (CILT, 2008)

## SECTORS

### ***Alliance of Sector Skills Councils***

The Alliance of Sector Skills Councils is a new organisation comprising all 25 licensed UK Sector Skills Councils (SSCs). CILT is working with the Alliance to ensure that business and employers in all sectors across the UK have access to the competitive advantage offered by language and intercultural skills.

### ***Language Skills Alliance***

CILT and GoSkills, through the Language Skills Alliance, are working with the Skills for Business Network (SfBN) to ensure that business and employers in all sectors across the UK have access to the competitive advantage offered by language and intercultural skills.

Further information is available from the Skills for Business section on the CILT website:

[www.cilt.org.uk/employment/sfbn/alliance.htm](http://www.cilt.org.uk/employment/sfbn/alliance.htm)

### ***Key Regional Sectors***

The following key sectors for economic growth within the region are:

- Advanced Engineering and Metals
- Digital and New Media Industries
- Food and Drink
- Environmental Technologies
- Healthcare Technologies

Leisure, Travel and Tourism is also an important industry sector in the region:

- Currently there are 77,000 people employed in regional tourism, of which 55% are in the hotel/restaurant sector;
- Key skills identified for improvement are marketing, management, selling, customer care, communications, craft skills and **languages** (Levels 2 and 3);
- Delivery of the 2012 London Olympic Games will require skills within hospitality and catering, event management and sport (LSC, 2007).

Industries experiencing a higher than average incidence of skills shortage vacancies tend to be either manufacturing/primary industries, construction or service industries dominated by public sector employers (LSC, 2008).

Table 2 shows the largest employment sectors in the Yorkshire and The Humber with corresponding SSCs, along with LMI specific to the sector and/or region where available.

**Table 2: Key Yorkshire and Humber Industry Sectors**

| SECTOR                                   | SSC                    | KEY LANGUAGES LMI  |
|--|------------------------|--|
| ADVANCED ENGINEERING AND METALS          | SEMTA                  | 15% OF ALL SEMTA EMPLOYERS REPORT FOREIGN LANGUAGE SKILLS GAPS<br><i>DATA NOT PROVIDED AT REGIONAL LEVEL</i>   |
| DIGITAL AND NEW MEDIA INDUSTRIES         | SKILLSET               | NO MENTION OF FOREIGN LANGUAGES COULD BE FOUND ON THE WEBSITE  |
| FOOD AND DRINK                           | IMPROVE LTD            | THERE ARE MORE THAN 72,400 NON-UK NATIONALS ESTIMATED TO BE WORKING IN THE UK FOOD AND DRINK MANUFACTURING INDUSTRY – AROUND 8% IN YH I.E. ALMOST 6,000 PEOPLE<br>NO LANGUAGE SPECIFIC LMI COULD BE FOUND ON THE WEBSITE   |
| ENVIRONMENTAL TECHNOLOGIES               | LANTRA                 | NATIONALLY, 11.8% OF SECTOR EMPLOYERS HAVE SOUGHT INFORMATION ABOUT ESOL/LANGUAGE COURSES<br>TWO FIFTHS OF EMPLOYERS SAID THEY NEEDED FURTHER INFORMATION REGARDING MIGRANT WORKERS, MAINLY: <ul style="list-style-type: none"> <li>- ASSISTANCE WITH OVERCOMING LANGUAGE BARRIERS ESPECIALLY POLISH &amp; RUSSIAN</li> <li>- GENERAL INFORMATION</li> <li>- EMPLOYMENT LAW / LEGAL ISSUES</li> </ul> HEALTH & SAFETY IS A KEY ISSUE IN TERMS OF LANGUAGE BARRIERS<br>NO REGIONAL LMI COULD BE SOURCED |
| HEALTHCARE TECHNOLOGIES                  | Skills for Health      | LANGUAGES ARE IDENTIFIED AS AN EMPLOYABILITY SKILLS REQUIREMENT FOR UK HEALTH PROFESSIONALS<br>NO REGIONAL LMI COULD BE SOURCED  |
| HOSPITALITY, LEISURE, TRAVEL AND TOURISM | PEOPLE 1 <sup>ST</sup> | YH HARD-TO-FILL VACANCIES ARE SLIGHTLY HIGHER THAN THE UK AVERAGE AND NEARLY HALF OF THESE ARE PROVING HARD-TO-FILL DUE TO SKILL SHORTAGES, HIGHER AGAIN THAN THE UK AVERAGE   |

## INTERNATIONAL TRADE

The RLN Language Skills Audit (2001) identifies France, Germany, the Netherlands, Italy and the Middle East as the main non-English speaking export markets for the Yorkshire and Humber region at that time (see Table 3).

**Table 3: YH Main Non-English Speaking Export Markets**

| Destination        | % of companies YH |
|--------------------|-------------------|
| France             | 44.8              |
| Germany            | 40.5              |
| Netherlands        | 29.0              |
| Italy              | 26.8              |
| Middle East        | 25.9              |
| Spain              | 24.1              |
| Central Europe     | 21.6              |
| South East Asia    | 22.9              |
| Sweden             | 18.9              |
| Japan              | 17.1              |
| Norway             | 15.2              |
| China              | 14.3              |
| Finland            | 10.7              |
| Russian Federation | 6.1               |
| Latin America      | 5.5               |
| Denmark            | 3.4               |
| Africa             | 3.4               |
| Portugal           | 3.0               |
| Belgium            | 2.4               |
| Europe (undefined) | 1.8               |

Note: Percentages will sum to more than 100%, because of multiple mentions by individual companies.

### Latest International Trade Data

In Yorkshire and The Humber during quarter 3, 2008, compared to the same period in 2005 (HMRC, 2008):

- Total export value increased by 23%, compared to 14% for England and 18% for the UK;
- European Union (EU) exports grew by 12% and non-EU exports by 39%;
- There were 5,103 exporters in the region - the majority export to non-EU countries (4,801 companies);
- A 2% growth in the number of non-EU exporters in the region was experienced (the same as in England and UK);

**The value of exports from the Yorkshire and Humber region has increased significantly over the past year**

- A drop of 4% in the number of EU exporters (compared to -8% England and -7% UK) was seen;
- Despite the economic downturn, there was an increase of 138 regional exporters (4%) between quarters 1 and 3, 2008;
- There has been an increase in regional export value to all country groups except for Western Europe excluding the EU, which saw a loss of 19%;
- In terms of value, the exports markets experiencing the largest increase were EU, North America and Sub-Saharan Africa;
- The highest percentage increases were the Sub-Saharan Africa, Eastern Europe (excluding EU) and Latin America and Caribbean export markets.

Final regional trade data, including quarter 4, for 2008 have not yet been published.

## RECRUITMENT

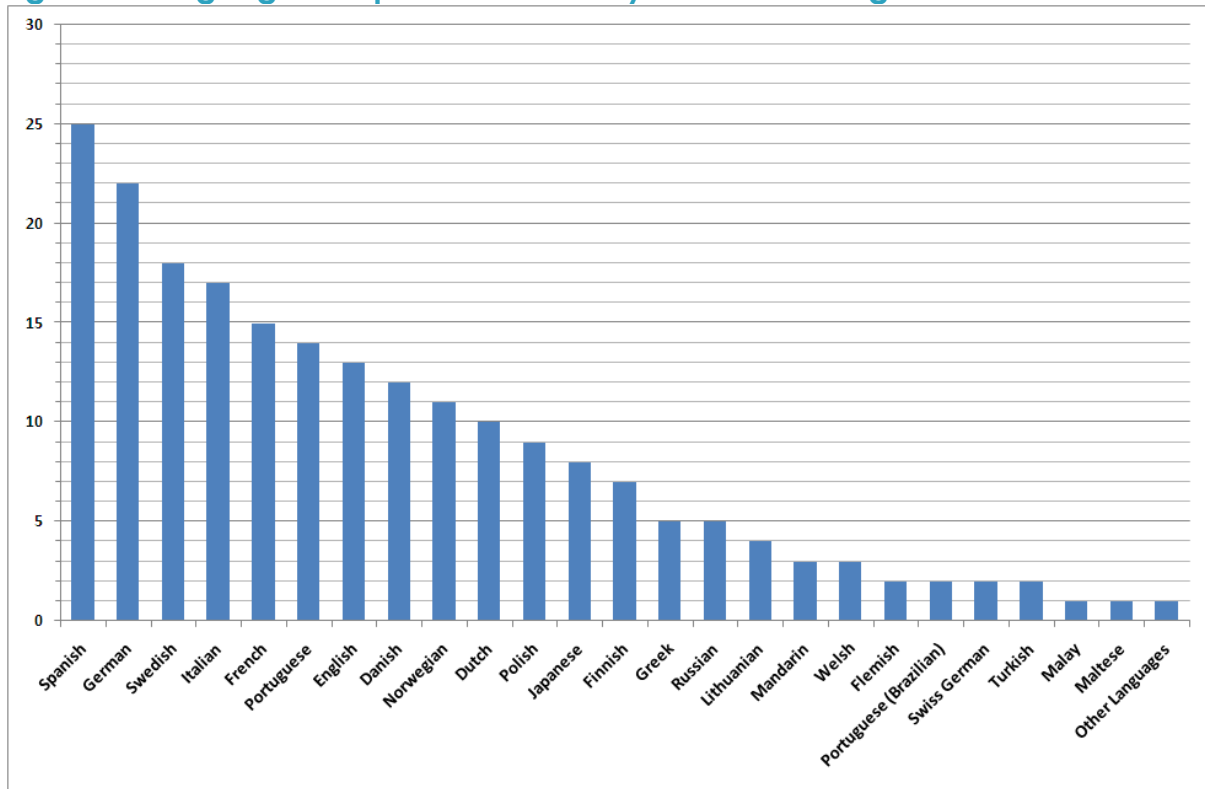
RLN D&R works with several specialist language recruitment agencies and job sites, which are able to provide ad-hoc data on candidate language and other skills in response to inward investment enquiries.

The largest websites are Top Language Jobs and Multi-Lingual Vacancies, where 50 currently advertised regional vacancies require speakers of 24 different languages (plus one that asks for English 'Other Languages'). Figure 3 shows the languages currently in demand from regional employers.

- Spanish, German, Swedish, Italian, French and Portuguese are the languages in greatest demand.

It should be borne in mind that this provides a snapshot of languages required for employment purposes in the region at the time.

**Figure 3: Languages Required in Currently Advertised Regional Job Vacancies**



## KEY FINDINGS

### *RLN YH Data and Research*

- Data has been requested from RLN D&R on 13 different languages plus Scandinavian over the last 3 years. German is the language for which data was most often requested, followed by French, Italian and Spanish;
- Of the companies assisted by RLNYH since November 2006, German was required most often, followed by French, Russian, Spanish, Polish and Chinese. In total, 21 different languages were required including British Sign Language (BSL) and English;
- The Northern Language Survey (2006) identified that over half of respondents use their foreign language skills at work. French, German, Spanish, Italian, Dutch and Polish are the languages most likely to be in use;

### *International Trade*

The RLN Audit (2001) found that 52% of 'international' companies (companies involved in export trade) regularly use foreign languages. The apparently lower percentage of respondents using foreign languages in this study may reflect the poorer export performance at the time or may just reflect an accurate baseline;

- The main languages in use at the time of the RLN Language Audit (2001) are French, German, Spanish and Italian. The survey also reveals small, but significant use of a number of languages from the Indian sub-continent and adjoining regions (e.g. Pakistan);
- France and Germany are the key markets. However, the Netherlands is an export 'destination' that has developed substantially in recent years;
- The rise in the number of respondents citing Chinese as a language causing a barrier to trade is noticeable. In particular, it is believed that potential growth could be achieved with access to Chinese language and skills;
- Japan, China, the Middle East and South East Asia are reported to cause the most barriers to trade in terms of cultural understanding.

Latest regional trade figures show:

- The total regional export value increased by 23% between 2005 and 2008. EU exports grew by 12% and non-EU exports by 39%;
- Despite the economic downturn, there was an increase of 138 regional exporters (4%) between quarters 1 and 3, 2008;
- There has been an increase in regional export value to all country groups except for Western Europe excluding the EU, which saw a loss of 19%;
- In terms of value, the exports markets experiencing the largest increase were EU, North America and Sub-Saharan Africa;
- The highest percentage increases were the Sub-Saharan Africa, Eastern Europe (excluding EU) and Latin America and Caribbean export markets.

### ***Interpreting and Translation Sector***

- There is an acute shortage of public service interpreters in most languages, and in particular British Sign Language;
- Accessing translation and especially interpreting services and working in the sector is particularly difficult in rural areas;
- Providing the particular languages required in remote locations and possibly at unsocial hours is particularly challenging;
- Demand for particular language skills is no longer confined to ports and other urban centres; economic imperatives and Government dispersal policy mean they can arise almost anywhere at any time.

### ***Language Skills Needs***

- Spanish, German, Swedish, Italian, French and Portuguese are the languages in greatest demand in regional job vacancies currently being advertised;
- Acquiring English language skills is the most important issue to migrant workers in the region
  - a. There are indications that migrant workers are waiting longer to gain a place on an ESOL course in some parts of the Region, particularly West Yorkshire;
  - b. It is expected that this demand will further increase and span across a wider range of languages than at present.

### ***Employer Endorsement of Language***

- Regional employers consistently fail to endorse the foreign language skills need, with only 3% in the latest National Employer Skill Survey (NESS) claiming it as a skill in need of improvement (down from 5% in November 2006);
- It is suggested that greater awareness of the subject needs to be addressed with employers in order to stimulate this area of learning, as currently language learning may be best described as a learning need, but not a learning demand (LSC, 2008).

## Summary of Key Findings

Table 4 summarises the languages and key issues identified, which shows that French and German are the languages in most demand within the region. Spanish and Italian are also important and Chinese is emerging as a regional language requirement, particularly for future economic development.

**Table 4: Identified Language Needs**

| SOURCE                 | LANGUAGE REQUIREMENTS                     |   | POINTS OF NOTE   |
|------------------------|---|---|--|
|                        | PRIMARY                                   | SECONDARY                                     |  |
| CILT (NATIONAL)        | FRENCH, GERMAN, SPANISH, ITALIAN          | ARABIC, MANDARIN CHINESE, RUSSIAN             | - ACUTE SHORTAGE OF PUBLIC SERVICE INTERPRETERS, PARTICULARLY BSL                              |
| CBI (NATIONAL)         | FRENCH, GERMAN                            | SPANISH, MANDARIN/CANTONESE                   | - CONVERSATIONAL ABILITY KEY   |
| RLN AUDIT              | FRENCH, GERMAN, SPANISH, CHINESE, ITALIAN | JAPANESE, RUSSIAN, ARABIC                     | - CHINESE IS EMERGING AS A KEY FUTURE REQUIREMENT  |
| RLN LANGUAGE SURVEY    | FRENCH, GERMAN, SPANISH, ITALIAN,         | DUTCH, POLISH                                 |  |
| RLN D&R DATA ENQUIRIES | GERMAN, FRENCH, ITALIAN, SPANISH          | CHINESE, FINNISH, NORWEGIAN, POLISH           | - SHORTAGE OF RELIABLE, TIMELY DATA ON REGIONAL LANGUAGE SKILLS                                |
| RLN BUSINESS ASSISTS   | GERMAN, FRENCH, RUSSIAN                   | SPANISH, POLISH, CHINESE                      |  |
| NESS (2007)            | ENGLISH                                   |   | - ENGLISH LANGUAGE SKILLS ARE AN IDENTIFIED BARRIER TO LABOUR MARKET PROGRESSION IN THE REGION |
| RECRUITMENT SITES      | SPANISH, GERMAN, SWEDISH, ITALIAN, FRENCH | PORTUGUESE, ENGLISH, DANISH, NORWEGIAN, DUTCH | - 50 REGIONAL VACANCIES ADVERTISED ON TWO SITES DESPITE ECONOMIC DOWNTURN                      |

## CONCLUSIONS/RECOMMENDATIONS

### *Employer Needs*

Overall, the evidence gathered in this report indicates that French and German are the languages in most demand within the region. Spanish and Italian are also important and Chinese is emerging as a regional language requirement, particularly for future economic development.

There is also evidence of a need for wider range of language skills within the region, for example, Japanese, Russian and Arabic. Unfortunately, it is not clear at this stage how well the supply of language skills in the region meets these needs.

- ***A supply-side bulletin is required to assess the match between supply and demand for languages in the region***

### *Data Requirements*

There is a distinct lack of reliable, up-to-date data on language requirements in the region. Disappointingly, there is no specific mention of languages in the Leitch review and other key documents e.g. some SSC publications.

For the first time, language will be included in the next UK Census of Population. However, this will not be conducted until 2011 and the publication of data can take a long time. Timely and reliable LMI is key to supporting economic development and is a key objective within the RES so provision must be made in the interim.

- ***An update to the RLN Language Skills Audit would provide more up-to-date LMI for the region to support economic/skill development and changes over time***
- ***Collaboration with specialist language recruitment agencies/job sites could provide timely data on current, regional employer language requirements***

### *Other Issues*

#### English as a Second Language

An identified barrier to progress in the labour market for some is their level of English language skills and the region contains significant numbers of adults for whom English is a second or third language. Often, they are working in less skilled occupations relative to their actual skills levels.

According to the Learning and Skills Council (LSC, 2008), language is the most important issue facing migrant workers. English for speakers of other languages (ESOL) provision, particularly when it is free to workers, has been important for migrant workers in order to help them meet short term confidence-building needs.

Furthermore, ESOL provision is not currently meeting demand, particularly in certain areas within the region. The region is losing out on valuable skills, not just foreign

languages, which could be utilised to address regional skills gaps/shortages and also to help meet future demands.

- ***Provision of English language training to meet demand at local level is essential***

#### Public Service Interpreting

There is an acute shortage of public service interpreters in most languages, and in particular British Sign Language. Demand is no longer confined to urban centres - access to services is particularly difficult in rural areas and at unsocial hours

- ***Shortage of public service interpreters and access to their services needs urgently addressing***

#### **Dissemination**

LSC (2008) identified that regional employers consistently fail to endorse the foreign language skills need and suggest that greater awareness of the subject needs to be addressed with.

The RES has a specific objective to: 'use evidence on skills and economic needs to guide action' (p. 70) to ensure learning and skills resources are invested where they will make most difference. Therefore, it is vital that the key messages of this report are effectively communicated throughout the region, so that stakeholders are able to act upon identified issues.

RSP are committed to bringing together the key agencies and sectors in the region concerned with the skills agenda and so, are ideally placed to ensure distribution to relevant parties.

- ***Dissemination of findings to key regional stake-holders in conjunction with Regional Skills Partnership is crucial***

Additionally, the SSCs cover approximately 85% of the UK workforce and represent the skills and training interests of small to large business. Key industry sectors for the region have been identified within this report and it is crucial that foreign language and cultural needs are incorporated into SSC strategies.

- ***Collaboration between RLN YH and local SSCs (where appropriate/available) is vital to ensuring regional employers are aware of the economic importance of foreign language skills and have access to relevant business support***

## GLOSSARY/ACRONYMS

|         |   |
|---------|---|
| BSL     | BRITISH SIGN LANGUAGE                       |
| CILT    | NATIONAL CENTRE FOR LANGUAGES               |
| ESOL    | ENGLISH FOR SPEAKERS OF OTHER LANGUAGES     |
| EU      | EUROPEAN UNION                              |
| GOR     | GOVERNMENT OFFICE REGION                    |
| HMRC    | HER MAJESTYS REVENUE AND CUSTOMS            |
| LMI     | LABOUR MARKET INTELLIGENCE                  |
| LSC     | LEARNING AND SKILLS COUNCIL                 |
| RES     | REGIONAL ECONOMIC STRATEGY                  |
| RLN D&R | REGIONAL LANGUAGE NETWORK DATA AND RESEARCH |
| RLN     | REGIONAL LANGUAGE NETWORK                   |
| SfBN    | SKILLS FOR BUSINESS NETWORK                 |
| SME     | SMALL TO MEDIUM-SIZED ENTERPRISE            |
| SSC     | SECTOR SKILLS COUNCIL                       |
| UK      | UNITED KINGDOM                              |
| UKTI    | UK TRADE AND INVESTMENT                     |
| YH      | YORKSHIRE AND THE HUMBER                    |

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Yorkshire Forward. *The Regional Economic Strategy for Yorkshire & Humber 2006-2015.*

## WEBSITES

|  |  |
|--|--|
| Alliance of Sector Skills Councils   | <a href="http://www.sscalliance.org">www.sscalliance.org</a>                             |
| Business Link Yorkshire:   | <a href="http://www.businesslink.gov.uk/yorkshire">www.businesslink.gov.uk/yorkshire</a> |
| CILT, The National Centre for Languages  | <a href="http://www.cilt.org.uk">www.cilt.org.uk</a>                                     |
| Government Skills:<br>Central Government SSC                                   | <a href="http://www.government-skills.gov.uk">www.government-skills.gov.uk</a>           |
| Improve Ltd:<br>Food & Drinks Manufacturing & Processing SSC                   | <a href="http://www.improveltd.co.uk">www.improveltd.co.uk</a>                           |
| LANTRA:<br>Environment & Land-Based SSC  | <a href="http://www.lantra.co.uk">www.lantra.co.uk</a>                                   |
| Multi-Lingual Vacancies:   | <a href="http://www.multilinguallvacancies.com">www.multilinguallvacancies.com</a>       |
| YH Chamber of Commerce:  | <a href="http://www.yhchambers.org">www.yhchambers.org</a>                               |
| People 1 <sup>st</sup> :<br>Hospitality, Leisure, Travel & Tourism SSC         | <a href="http://www.people1st.co.uk">www.people1st.co.uk</a>                             |
| RLNYH LTD  | <a href="http://www.rln-yh.com">www.rln-yh.com</a>                                       |
| RLN Data & Research:   | <a href="http://www.rln-research.com">www.rln-research.com</a>                           |
| SEMTA:<br>Science, Engineering & Manufacturing Technologies SSC                | <a href="http://www.semta.org.uk">www.semta.org.uk</a>                                   |
| Skills for Health:<br>UK Health Sector SSC                                     | <a href="http://www.skillsforhealth.org.uk">www.skillsforhealth.org.uk</a>               |
| Skillset:<br>Broadcasting, Photo Imaging, Audio Visual & Publishing Sector SSC | <a href="http://www.skillset.org.uk">www.skillset.org.uk</a>                             |
| Top Language Jobs:   | <a href="http://www.toplanguagejobs.co.uk">www.toplanguagejobs.co.uk</a>                 |
| Trade Yorkshire:   | <a href="http://www.tradeyorkshire.com">www.tradeyorkshire.com</a>                       |
| UK Trade and Investment  | <a href="http://www.uktradeinvest.gov.uk">www.uktradeinvest.gov.uk</a>                   |
| YH Regional Skills Partnership:  | <a href="http://www.yhrsp.com">www.yhrsp.com</a>   |
| Yorkshire Forward:   | <a href="http://www.yorkshire-forward.com">www.yorkshire-forward.com</a>                 |
| Yorkshire Futures:   | <a href="http://www.yorkshirefutures.com">www.yorkshirefutures.com</a>                   |