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Study on Foreign Language Proficiency and Employability

Final Report

Study on Foreign Language Proficiency and Employability

EUROPEAN COMMISSION

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Contact: Lieve van den Brande and Sonia Peressini

E-mail: Godelieve.Van-Den-Brande@ec.europa.eu; Sonia.Peressini@ec.europa.eu

European Commission

B-1049 Brussels

Study on Foreign Language Proficiency and Employability

Final Report

Shane Beadle¹

Martin Humburg

Richard Smith

Patricia Vale

This study provides an overview of the state of play of labour market demand for foreign language proficiency in all EU-28 Member States. It examines how this demand varies across countries, economic sectors and job roles; shows how employers express their foreign language needs in online vacancy notices; and analyses to what extent foreign language skills present a distinct competitive advantage for both companies and job seekers. Between June and October 2015, 845 interviews with employers and employer organisations were conducted, 3632 online vacancy notices were reviewed, and 522 employers were surveyed. Based on the analysis of this comprehensive data collection this study formulates recommendations on how to improve the match between the supply and demand of foreign language skills in the labour market.

Cette étude donne une vue d'ensemble de l'état des lieux de la demande, sur le marché du travail, de maîtrise en langues étrangères dans tous les Etats membres de l'UE-28. Elle examine comment cette demande varie d'un pays à l'autre, d'un secteur économique à l'autre et d'un poste de travail à un autre; elle montre comment les employeurs expriment leurs besoins en termes de langues étrangères dans les offres d'emploi en ligne ; et elle analyse la mesure dans laquelle les compétences en langues étrangères offrent un avantage concurrentiel spécifique à la fois aux entreprises et aux chercheurs d'emploi. Entre juin et octobre 2015, 845 entretiens avec des employeurs et des organisations patronales ont été conduits, 3632 offres d'emploi en ligne ont été revues et 522 employeurs ont participé à une enquête en ligne. Sur base de l'analyse de ce recueil de données détaillé, cette étude formule des recommandations pour améliorer l'adéquation entre l'offre et la demande de compétences en langues étrangères sur le marché du travail.

¹ This study was carried out by ICF International at the request of Directorate-General for Employment, Social Affairs and Inclusion. The authors would like to thank Stephanie Devisscher and Teresa Tinsley for their useful comments on the study design and on earlier drafts of this report.

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Table of Contents

EXECUTIVE SUMMARY	xiii
RESUME	xx
1 INTRODUCTION	1
1.1 Objectives and scope of the study	1
1.2 Structure of the report	2
2 DATA AND METHODOLOGY.....	3
2.1 Data source one: interviews with employers and employer organisations	3
2.2 Data source two: Review of online vacancy databases	6
2.3 Data source three: complementary survey	9
3 WHAT DOES THE RESEARCH EVIDENCE SAY ABOUT FOREIGN LANGAUGE SKILLS IN THE LABOUR MARKET	11
3.1.1 The scale of the demand	11
3.1.2 Which languages are in demand?	13
3.1.3 Does demand for foreign language proficiency differ by employer?	14
3.1.4 What foreign language skills are needed for what job roles?	16
3.1.5 To what extent are foreign language skills a career driver and an essential job-related competence?	16
3.1.6 Do proficient applicants have a competitive advantage?	17
3.1.7 How do employers verify foreign language proficiency of job applicants? 19	
3.2 Key points emerging from the analysis of existing research	19
3.3 Remaining gaps and implications for this study	20
4 BUSINESS NEEDS FOR FOREIGN LANGUAGE SKILLS AND HOW THEY ARE MET – EVIDENCE FROM INTERVIEWS FROM EMPLOYERS AND EMPLOYER BODIES	21
4.1 The scale of need for foreign language skills in enterprises in Europe: evidence from existing international and national studies	21
4.2 The purpose of language skills in enterprises	23
4.2.1 Sales, purchase and marketing	23
4.2.2 Execution and administration of imports and exports	24
4.2.3 Internal relations and communication	24
4.2.4 Customer service	25
4.2.5 Collaboration on transnational projects and communication within international communities of highly specialised professionals.....	26
4.2.6 The use of tools and equipment	26
4.2.7 Summary	27
4.3 Which are the most useful languages and why?	27
4.3.1 Most useful languages.....	27
4.3.2 Determinants of foreign languages required in businesses	29
4.3.3 Summary	30
4.4 What is the level of foreign language proficiency usually required/desired and why?	30
4.4.1 The level required by businesses of the most useful foreign language	30
4.4.2 The level required by businesses of the second most useful foreign language	36
4.4.3 Summary	40

4.5	<i>How do enterprises indicate/specify the level of competence required?</i>	40
4.6	<i>Extent to which languages are required or desired by employers</i>	42
4.6.1	Extent of language skills being required for jobs	42
4.6.2	Summary	44
4.7	<i>How do enterprises verify the language skills of recruits?</i>	45
4.7.1	Verification of language skills	45
4.7.2	Summary	49
4.8	<i>What are enterprises doing to meet their needs in relation to foreign languages?</i>	49
4.8.1	Training and development	49
4.8.2	Recruitment of native speakers	50
4.8.3	Summary	52
4.9	<i>What challenges do enterprises face in meeting their needs for foreign language skills?</i>	52
4.9.1	Extent to which enterprises face difficulties in filling vacancies	52
4.9.2	Reasons why vacancies are hard to fill	53
4.9.3	Bottleneck trends	55
4.9.4	Summary	57
4.10	<i>The extent to which languages generate competitive advantage for businesses</i>	57
4.10.1	The extent of competitive advantage from foreign language skills	57
4.10.2	The markets in which competitive advantage is gained through language proficiency	58
4.10.3	Summary	59
4.11	<i>The comparative advantage of individuals with foreign language proficiency</i>	59
4.11.1	The importance of foreign language proficiency in the recruitment process	59
4.11.2	Foreign language skills as a career driver	61
4.11.3	Foreign language skills as a necessary condition to get and do the job	61
4.11.4	The role of foreign language skills for career progression	62
4.11.5	Summary	63
5	BUSINESS NEEDS FOR FOREIGN LANGUAGE SKILLS AND HOW THEY ARE EXPRESSED IN ONLINE VACANCY NOTICES	64
5.1	<i>Which are the most useful languages?</i>	64
5.1.1	Most useful foreign language	64
5.1.2	The second most useful foreign language	67
5.1.3	The third most useful foreign language	70
5.1.4	Summary	71
5.2	<i>What is the level of foreign language proficiency usually required/desired?</i>	72
5.2.1	The level required by businesses for the most useful foreign language	72
5.2.2	The level required by businesses for the second most useful foreign language	76
5.2.3	The level required by businesses for the third most useful foreign language	80

5.2.4	Summary	81
5.3	<i>Extent to which languages are required or desired by employers</i>	81
5.3.1	Extent to which the most useful foreign language is required	82
5.3.2	Extent to which the second most useful foreign language is required	83
5.3.3	Extent to which the third most useful foreign language is required	84
5.3.4	Summary	85
5.4	Extent to which vacancy notices refer to EU-level tools (CEFR, Europass), foreign language certificates, and international experience	86
5.4.1	Summary	86
6	SURVEY RESULTS	87
6.1	<i>The added value of foreign language skills for businesses</i>	87
6.2	<i>The effectiveness of company-paid training and the national education system in providing the labour force with foreign language skills</i>	87
6.3	<i>The use of job interviews to verify applicants' foreign language proficiency</i>	88
6.4	<i>The lack of distinction of oral and written skills in vacancy notices</i>	89
6.5	Summary	90
7	COMPARISON OF FINDINGS FROM THE INTERVIEWS WITH EMPLOYERS AND THE ONLINE VACANCY DATABASE REVIEW	91
7.1	Most useful and second most useful languages	91
7.2	The level of proficiency required/desired	92
7.3	The extent to which foreign languages are required or desired	92
7.4	Summary	93
8	CONCLUSIONS	94
8.1	<i>Summary of findings</i>	94
8.1.1	Language needs depend on the foreign language-related tasks to be performed in the company	94
8.1.2	<i>...and the languages used by customers and trade/business partners</i>	95
8.1.3	Employers rarely use formal standards to indicate the level of language competence in vacancy notices	96
8.1.4	Employers most often test applicants' foreign language proficiency during the job interview	96
8.1.5	Initial education plays an important role in supplying businesses with foreign language skills	97
8.1.6	Recruitment of native speakers is mainly done in relation to very specific foreign language demands	97
8.1.7	Recruitment difficulties (bottlenecks) are mainly due to an insufficient foreign language proficiency of applicants	98
8.1.8	Foreign language skills provide competitive advantage both for businesses and job seekers – if they form part of a broader set of useful skills	98
8.2	<i>Contextualising the findings: the supply of language skills</i>	99
8.2.1	Language learning in primary and secondary education	99
8.2.2	Language learning in higher education	102
8.2.3	Language learning through employer-sponsored adult learning	103
8.2.4	Migration and the supply of foreign language skills	103
8.3	<i>Implications for employers and education providers</i>	104
8.3.1	Employers	104
8.3.2	Adult education and continuing VET	104
8.3.3	Higher education	104

8.3.4	School education and initial VET	105
9	Policy recommendations	106
9.1	Recommendations for the support for employers and individuals in the labour market	106
9.2	Recommendations for the support for schools, IVET and higher education institutions and individuals in education	106
	LIST OF REFERENCES	108
	TECHNICAL ANNEXES	111
	<i>Annex 1: Selection of business sectors</i>	111
	Identifying products and services with high import/export activity at EU level... ..	111
	Variations of import/export activity across countries.....	113
	Proposed list of economic sectors for research	115
	<i>Annex 2: Summary of the literature on the demand for foreign language skills in the labour market</i>	118
	<i>Annex 3: Descriptive statistics of data collected</i>	129
	Data from interviews with employers.....	129
	Data from review of online vacancy notices	130

Table of Figures

Figure 1: Business activities where foreign languages are most useful.....	12
Figure 2: Variance in importance of foreign language skills by country (taken from Eurobarometer 304).....	18
Figure 3: Most useful foreign language by sector	28
Figure 4: Second most useful language, by sector	29
Figure 5: Demand level of oral and written skills for the most useful foreign language	31
Figure 6: Demanded level of oral skills for the most useful foreign language, by sector	32
Figure 7: Demanded level of written skills for most useful foreign language, by sector	33
Figure 8: Demanded level of oral skills for most useful foreign language, by work experience	34
Figure 9: Demanded level of written skills for most useful foreign language, by work experience	35
Figure 10: Demanded level of oral skills for most useful foreign language, by education level.....	35
Figure 11: Demanded level of written skills for most useful foreign language, by education level	36
Figure 12: Demanded level of oral and written skills for the second most useful foreign language	37
Figure 13: Demanded level of oral skills for second most useful foreign language, by sector.....	37
Figure 14: Demanded level of written skills for second most useful foreign language, by sector	38

Figure 15: Demanded level of oral skills for second most useful foreign language, by work experience	39
Figure 16: Demanded level of written skills for second most useful foreign language, by work experience	39
Figure 17: Demanded level of oral skills for second most useful foreign language, by education level	39
Figure 18: Demanded level of oral skills for second most useful foreign language, by education level	40
Figure 19: Share of employers requiring the most useful language, by sector	42
Figure 20: Share of employers requiring the second most useful language, by sector	43
Figure 21: Share of employers requiring their most useful language, by career stage	44
Figure 22: Share of employers requiring their most useful language, by education level	44
Figure 23: Method of verification of language skills of recruits	45
Figure 24: Method of verification of language skills of recruits, by sector	47
Figure 25: Method of verification of language skills of recruits, by work experience...	48
Figure 26: Method of verification of language skills of recruits, by education level	48
Figure 27: Method of verification of language skills of recruits, by the degree of importance given to foreign language skills	49
Figure 28: Percentage of employers who have hired a foreign national to fill a foreign language bottleneck vacancy in the previous 12 months	51
Figure 29: Share of employers reporting difficulties in filling positions as a result of a lack of language proficiency of applicants, by sector	53
Figure 30: Reason why vacancies are hard to fill, by sector.....	54
Figure 31: Share of employers with recruitment difficulties who state that they experienced less, more or the same difficulties two years ago, by sector	55
Figure 32: Share of employers with recruitment difficulties who state that they expect difficulties to become less, more or stay the same in the next two years, by sector.....	56
Figure 33: Share of employers who believe that competitors' foreign language skills generate competitive advantage, by sector	57
Figure 34: Markets in which competitive advantage is gained through language proficiency	58
Figure 35: Most useful foreign language, by sector	65
Figure 36: Most useful foreign language by country	66
Figure 37: Most useful foreign language, by purpose.....	67
Figure 38: Second most useful foreign language, by sector.....	68
Figure 39: Second most useful language, by country	69
Figure 40: Second most useful foreign language, by purpose	70
Figure 41: Third most useful foreign language, by sector.....	71
Figure 42: Demanded level of oral skills for the most useful foreign language, by sector.....	72

Figure 43: Demanded level of written skills for most useful foreign language, by sector	73
Figure 44: Demanded level of oral skills for most useful foreign language, by work experience	73
Figure 45: Demanded level of written skills for most useful foreign language, by work experience	74
Figure 46: Demanded level of oral skills for most useful foreign language, by education level	74
Figure 47: Demanded level of written skills for most useful foreign language, by education level	75
Figure 48: Demanded level of oral skills for most useful foreign language, by purpose of foreign language skills	75
Figure 49: Demanded level of written skills for most useful foreign language, by purpose of foreign language skills	76
Figure 50: Demanded level of oral skills for second most useful foreign language, by sector	77
Figure 51: Demanded level of written skills for second most useful foreign language, by sector	77
Figure 52: Demanded level of oral skills for second most useful foreign language, by work experience	78
Figure 53: Demanded level of written skills for second most useful foreign language, by work experience	78
Figure 54: Demanded level of oral skills for second most useful foreign language, by education level	78
Figure 55: Demanded level of written skills for second most useful foreign language, by education level	79
Figure 56: Demanded level of oral skills for second most useful foreign language, by purpose of foreign language skills	79
Figure 57: Demanded level of written skills for second most useful foreign language, by purpose of foreign language skills	79
Figure 58: Demanded level of oral skills for third most useful foreign language, by sector	80
Figure 59: Required or desired, most useful language, by sector	82
Figure 60: Share of employers requiring their most useful languages, by career stage	83
Figure 61: Share of employers requiring their most useful language, by education level	83
Figure 62: Required or desired, second most useful language, by sector	84
Figure 63: Required or desired, third most useful language	85
Figure 64: The added value of foreign language skills in the company	87
Figure 65: Effectiveness of company-paid training and the national education system in providing employees with the needed foreign language skills	88
Figure 66: Reasons for using job interviews for verifying applicants' foreign language proficiency	88
Figure 67: Competency level distribution in the participating countries	102

Table of tables

Table 1: Number of interviews per sector	3
Table 2: Variables systematically recorded in all employer interviews.....	4
Table 3: Number of vacancies reviewed per sector.....	6
Table 4: Mapping of words and expressions in vacancy notices to language proficiency levels	8
Table 5: Number of employers invited to the survey, by country	10
Table 6: Required foreign language levels by job level and sector in Germany.....	22
Table 7: Importance of foreign languages, unweighted and weighted interview data	27
Table 8: Importance of foreign language proficiency for recruitment, by sector	59
Table 9: Importance of foreign language proficiency for recruitment, by career stage.....	60
Table 10: Importance of foreign language proficiency for recruitment, by educational requirement	60
Table 11: Importance of foreign languages, unweighted and weighted online vacancy database review data	64
Table 12: Most important second most useful foreign languages, unweighted and weighted online vacancy database review data	67
Table 13: Share of most useful languages by data source.....	91
Table 14: Share of second most useful languages by data source	92
Table 15: Most commonly learnt versus most commonly demanded foreign language (besides English)	100

Table of Annex tables

Annex Table 1: Intra and extra-EU trade in the EU-28 by product group, 2014 (in millions of Euro)	111
Annex Table 2: International trade in services in the EU-28, 2013 (in millions of Euro)	112
Annex Table 3: Share of exports by product 2014. Intra-EU28 trade.....	113
Annex Table 4: Intra EU28 trade in services, 2013 (in million of Euro)	114
Annex Table 5: Summary of the literature on the demand for foreign language skills in the labour market	118
Annex Table 6: Number of observations by sector, interview data	129
Annex Table 7: Number of observations by business size, interview data.....	129
Annex Table 8: Number of observations by work experience required, interview data	129
Annex Table 9: Number of observations by level of education required, interview data	129
Annex Table 10: Number of observations by positions that desire or require foreign languages, interview data	130
Annex Table 11: Number of vacancy notices reviewed by sector.....	130
Annex Table 12: Number of vacancy notices reviewed by work experience required	130

Annex Table 13: Number of vacancy notices reviewed by level of education required	130
Annex Table 14: Number of vacancy notices that require/desire a second or third foreign language.....	131
Annex Table 15: Number of vacancies by foreign language and the level required/desired	131

EXECUTIVE SUMMARY

Policy Context

The 2002 Barcelona objective 'to improve the mastery of basic skills in particular by teaching at least two foreign languages from a very early age' and to provide young people with foreign language competences that will support economic growth has been pursued through a range of European Commission activities. Key elements of this are:

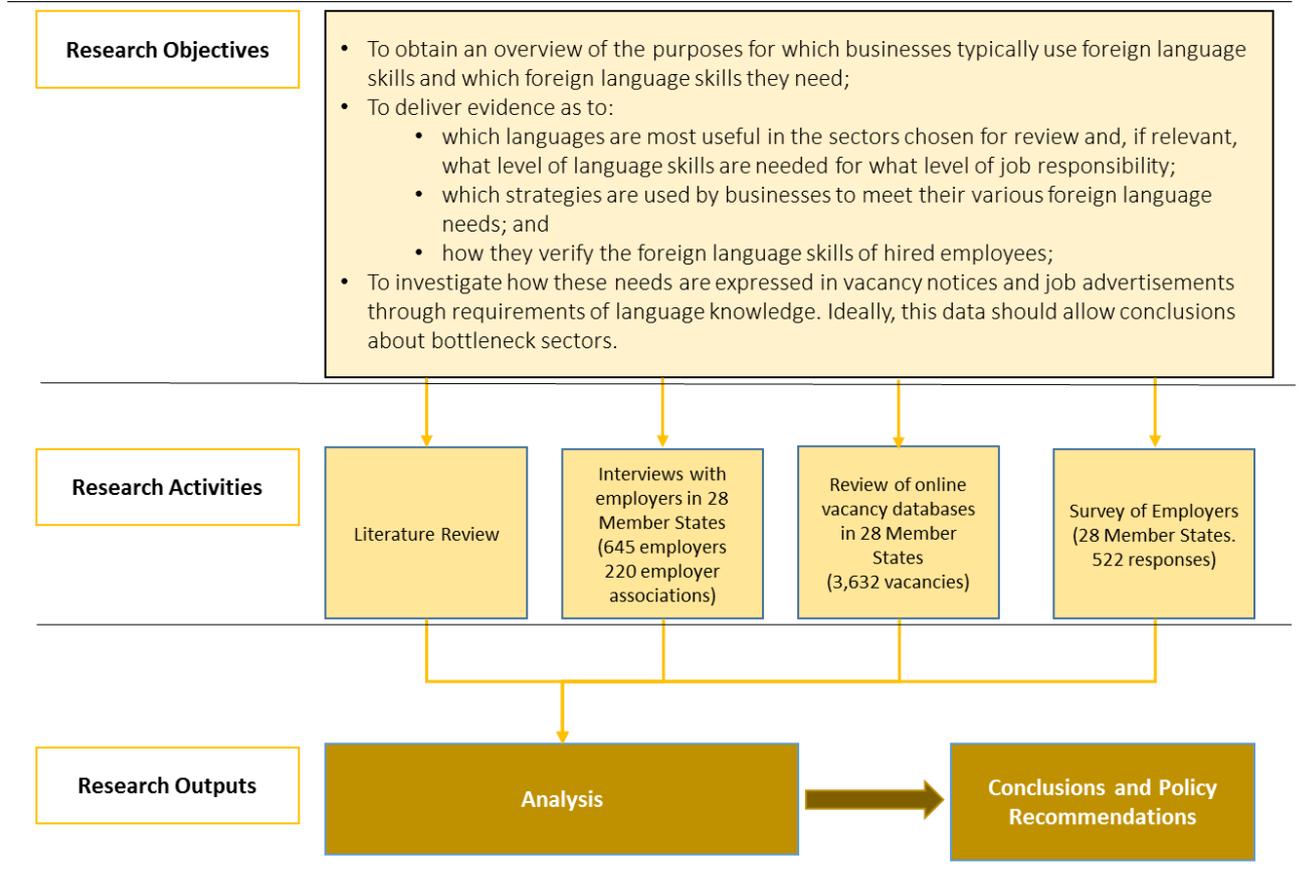
- The Strategic Framework for European Cooperation in Education and Training (ET2020).
- Rethinking Education (2012) - launched to support the ET2020 strategy – which identified aspects of European education and training systems that continue to fall short in providing the right skills for employability.
- A recent draft joint report on the 'New priorities for European cooperation in education and training' which underlines the relevance of foreign language competences – along with other key competences and attitudes - to enhance employability, innovation and active citizenship.

Against this background, this report presents the result of a study on the relationship between foreign language proficiency and employability in European Member States commissioned by DG EMPL.

Study Objectives and Research Activities

The study's objectives and research activities are illustrated below.

Study overview: research questions and research activities



This summary presents the main findings from the research activities, with the resulting conclusions and recommendations.

Foreign languages skills and the labour market: what is known from existing research?

The study identified 16 studies on the demand for foreign language skills in the labour market for detailed review. The following high level findings were drawn out:

- The scale of need for foreign language skills is substantial (except probably for English-speaking countries): studies consistently found that about one fifth to one quarter of jobs require an advanced level of foreign language skills (i.e. a level that goes beyond very basic knowledge and that therefore employers will include in the description of job vacancies);
- The scale of need increases with the job level (i.e. the level of education required to do the job): while many of the jobs performed by higher education graduates require foreign language proficiency, few of the medium-level professions have such requirements and relatively few of the positions for the low-skilled.
- While English is in demand as a foreign language for business, this is not the case for all international trade especially for cross neighbour border trade and trade with businesses in the large non-English speaking economies (both in and outside the EU) though the extent of this is not known across the EU;
- Foreign language needs appear to be different across sectors and seem to depend on businesses participation in cross-border trade. Existing research finds the importance of foreign language skills to be highest in the manufacturing/industry sector and lowest in public services. Little is known about trends and there is no comprehensive data on the demand for foreign languages by business sector across Europe;
- Since a low need for foreign languages appears to be associated with a focus of the business on the domestic market,² it seems reasonable to expect that demand may be greater from businesses in countries with smaller internal markets although supply chains and the increasing benefits of the free movement of goods and services within the EU appear to be extending demand for foreign language skills. While businesses using foreign language skills appear to benefit from this, those that do not may not be realising their potential;
- Despite this, foreign language skills are not as commonly seen as essential transversal skills for new entrants as other such skills. Foreign languages are however a prerequisite for some roles/occupations. Little is known about the level of competency required by businesses for roles/occupations;
- There are believed to be employability benefits for individuals with language skills - other than enabling mobility - where such skills are needed. Businesses value job seekers with foreign language skills as global markets mean that workforces need to be increasingly multilingual and the number of languages used are believed to have a positive influence on export success³;
- Little is known about how commonly employers assess potential recruits' language skills and which are most used but a variety of approaches is used in some countries.

Overall, the literature review revealed a lack of research which provides an overview of the state of play of labour market demand for foreign language proficiency across EU-28 Member States.

² COTANCE (2011), Report on language needs in business, CELAN Network Project.

³ According to the PIMLICO project, 'knowledge of a number of languages, rather than one or two, can make all the difference between an average performance and an exceptional one, and can provide that vital competitive edge' (p. 57).

Business needs for foreign language skills

Business needs for foreign language skills are drawn from an analysis of interviews with employers and reviews of online vacancy databases in all Member States. The study undertook analysis of online vacancy notices placed in Member States between 15 August and 15 September 2015.

The purpose of language skills in enterprises

Interviews with employers undertaken for this study indicated that the need for foreign language proficiency depends on the job tasks and the extent to which they are related to the following six purposes of foreign language skills in businesses: sales, purchasing and marketing; the execution and administration of imports and exports; internal relations and communication; collaboration on transnational projects and communication within international communities of highly specialised professionals; and the use of tools and equipment.

These purposes of foreign language skills and the job roles associated with them can be found in all sectors examined in this study. The use of a foreign language for internal communication depends on the business being part of, or belonging to, a multinational company. For the other purposes distinguished in this study, the proportion of the workforce with associated job roles varies across sectors.

Most useful languages and why

English is by far the most important language in international trade and the provision of services. Over four in five employers interviewed and three quarters of advertised online vacancies stating that this was the most useful language for the jobs discussed/reviewed in all sectors and in almost all non-English speaking countries.

For a fifth to a quarter of employers a language other than English is the most useful foreign language. At the EU level, the three languages other than English mentioned most often are German, French and Russian.

The most cited second most useful languages are German, Russian, English, French, Spanish and Italian, with no single language having a clear majority. There is some variance in the strength of this finding between sectors.

German, because Hungary's largest economic partner is Germany. Most orders come from Germany.¹

Besides the languages of larger countries and markets employers demand a broad range of other, smaller languages. The usefulness of languages other than English appears to be driven by the location of businesses' customers and trade partners. Often, the language employers consider second most useful is the language of a neighbouring country. Against this background, demand for languages other than English differs across, and is similar within, countries.

Level of foreign language proficiency usually required

Overall employers tend to demand a higher level of oral than written skills for both the most and second most useful language. Job roles most clearly requiring higher levels of oral than written skills are those with a strong customer service focus.

For the most useful foreign language, employers interviewed most often ask applicants to have high (C1-C2) or medium level (B1-B2) foreign language proficiencies, enabling them to effectively communicate with native speakers, even if interaction is limited to familiar contexts. This finding is supported by the review of online vacancies. The demanded level of foreign language skills for the most useful foreign language is positively associated with the job level. Jobs requiring a higher education degree tend to have higher foreign language requirements.

For the second most useful foreign language, employers interviewed most often asked for medium level skills (B1-B2), both in oral and written competence. Similarly the review of online vacancy databases indicates that for second most useful foreign languages a greater number of employers are content with a lower level of proficiency

(A1-A2), enabling workers to transmit short and simple messages both orally and in writing.

How do enterprises indicate/specify the level of competence required?

Very few of the employers interviewed and few vacancies advertised online⁴ use formal classifications, such as the Common European Framework of Reference for Languages (CEFR), to indicate the level of language competence in vacancy notices. Moreover, the majority of vacancy notices do not distinguish between levels of oral and written skills demanded. Commonly reported reasons are the effort necessary to understand formal classifications (both by employer and applicant); employers deliberately being vague about foreign language requirements in order not to discourage potential applicants who are not confident of their foreign language skills, and a lack of awareness among recruiters and employers.

Extent to which languages are required or desired by employers

When employers demand at least one foreign language, the most useful foreign language is more often required than only desirable. Almost all vacancies reviewed (more than 9 in 10) defined the most useful foreign language as an essential requirement of the job, across all sectors. Competency in the second most useful language is much less often required than competency in the most useful language. There is no clear relationship between the job level and likelihood of the second most useful language being required for the job.

How do enterprises verify the language skills of recruits?

The most common method of verification of language skills reported by interviewees are oral tests, followed by both written and oral tests, certification by third parties, other methodologies and, lastly, written tests. There are a wide range of methods employers use to verify applicants' foreign language proficiency, from looking for international experience in CVs to relying on school grades or language certificates from testing services. Relatively few employers appear to use Europass self-assessments to the levels of the CEFR. The analysis of online vacancies found that language certifications were explicitly required in less than 1% of the vacancies. While some of these refer generically to any certification, others asked for specific certificates (e.g. Cambridge English exams, Berlitz levels, IELTS, TOEFL, school leaving certificates).

What are enterprises doing to meet their needs in relation to foreign languages?

One in five employers reports having hired a native speaker (foreign national) in the past 12 months. The most frequently reported reason for hiring native speakers is the difficulty of filling positions which require a high level of proficiency in a specific and less common language.

Most employers meet their needs for foreign language skills by recruiting people with the required skills. Training generally focuses on increasing the level of existing language skills rather than providing training in new foreign languages.

What challenges do enterprises face in meeting their needs for foreign language skills?

One third of employers experience difficulties in filling positions as a result of a lack of applicants' foreign language skills. Two thirds of these difficulties are due to insufficient foreign language levels of job applicants, one third is due to the inability of finding suitable candidates with proficiency in a particular language.

⁴ One of the exceptions was a Slovak portal supported by the Ministry of Labour and the public employment service, which uses the CEFR levels to indicate demanded foreign language proficiency in its job vacancy notices

The extent to which languages generate competitive advantage for businesses

About one quarter of employers feel that their competitors have a competitive advantage because of their stock of foreign language skills, with some variation across sectors. The sector in which employers believe their competitiveness is least affected by the stock of foreign language skills of competitors is the Manufacturing sector (one fifth of employers).

The market in which competitive advantage is gained through language proficiency differs across sectors. While this is clearly the domestic market in the Accommodation and food service activities sector, it is foreign markets which are affected by competitors stock of foreign language skills in the Transportation and storage, Professional, scientific and technical activities and Manufacturing sectors. In the Wholesale and retail trade sector both markets appear to be equally affected. Competitive advantage may come from cultural knowledge as well as language skills.

The comparative advantage of individuals with foreign language proficiency

There is clear evidence that foreign language skills are a career driver – if they form part of a broader package of relevant (specific) skills. In combination with the right educational background and relevant work experience, foreign language skills provide access to jobs in international trade and services for which they are a prerequisite. There is also evidence, although not as clear cut, that foreign language proficiency facilitates career progression.

"Language is a big asset. If you are able to speak several languages your career will not be the same."¹

Employer Survey Analysis

Almost all respondents of the survey strongly agree or agree that foreign language skills help building more effective relationships with customers and provide value for growth. Consistent with this, most employers disagree or strongly disagree that high quality products or services do not require foreign language skills to be successfully sold. With regard to the supply of foreign language skills, most employers strongly agree or agree that company paid training is effective in providing employees with the foreign language skills they need for their job. Considering their national education system's contribution to the supply of foreign language skills, there are roughly as many employers who agree as disagree that national education systems are effective in providing companies with the foreign language skills they need.

Conclusions

1. Language needs depend on the foreign language-related tasks to be performed in the company;
2. The most important driver of required languages appears to be the language used by customers, clients and partners;
3. Recruiters rarely use formal classifications to indicate the level of language competence they require in vacancy notices;
4. Employers most often test applicants' foreign language proficiency during the job interview. There exists a wide range of methods employers use to verify applicants' foreign language proficiency, from looking for international experience in CVs to relying on school grades or language certificates from testing services. Nearly half of the employers interviewed, however, use oral tests and assess candidates' foreign language skills as part of the job interview;
5. The need for foreign language skills is mainly met through the recruitment of new employees with the necessary foreign language skills;
6. Recruitment of native speakers is mainly done in relation to very specific foreign language demands. A quarter of employers interviewed had recruited a native speaker (foreign nationals) to meet language demands in the past 12 months. The hiring of native speakers is mostly related to demand of a

particular language which is uncommon or insufficiently available in the national labour market;

7. Recruitment difficulties (bottlenecks) are mainly due to an insufficient foreign language proficiency of applicants. About one third of employers have difficulties filling vacancies as a result of applicants with insufficient foreign language competences. Two thirds of these difficulties are due to an insufficient level of foreign language skills and one third due to a lack of applicants proficient in a particular language;
8. Foreign language skills provide competitive advantage both for businesses and job seekers - if they form part of a broader set of useful skills.

Policy Recommendations

This study formulates recommendations for the European Commission, national governments and providers of foreign language learning, including employers, based on the conclusions drawn from the analysis of employer interviews, the review of online vacancy notices and the employer survey. Recommendations are divided between those relating to employment and lifelong learning and those relating to education.

Recommendations for the support for employers and individuals in the labour market

- Employers should provide off the job training in language competences where employees' competences do not match the needs of the job, or the higher level competences expected for roles they could be promoted to;
- National governments and public employment services should better inform employers about the levels of competency they should expect young people to have reached at the end of different stages/levels of education, so they can design their training policies accordingly;
- National governments, career guidance services and public employment services should inform employees, job-seekers and new entrants about the distinct advantage foreign language skills provide in the labour market and encourage them to take advantage of existing adult learning opportunities to maintain and develop the foreign language competences they acquired at school while they are not using them regularly;
- Similarly, employers should encourage employees to take advantage of existing adult learning opportunities to maintain and develop the foreign language competences they acquired at school while they are not using them regularly.
- The European Commission, national governments and public employment services should better inform employers requiring language skills about language education and the methods of standardised assessment they could use.
- The European Commission, national governments and public employment services should encourage employers to provide certification and documentation of the foreign language skills of their employees, based on training offered or assessment carried out, so this information is available for subsequent employers. Reliable assessment results would presuppose employers' use of formal assessment frameworks, which is not currently the case.
- The European Commission, national governments, and public employment services should promote the use of the CEFR among employers as a readily available tool which can help expressing and documenting work related foreign language needs;
- The European Commission, national governments, public employment services and employers should promote the use of the CEFR among job seekers as a readily available (self-assessment) tool which can help provide employers with relevant information on foreign language proficiency acquired at school or during previous employment.

Recommendations for the support for schools, IVET and higher education institutions and individuals in education

- National governments should encourage higher education institutions to help students with language competences to maintain and enhance them when they are not using them regularly in their studies, for example through accredited or non-accredited language training;
- National governments should support schools and higher education institutions in making sure that learners can reach independent user (B1 and B2) or proficient user (C1 and C2) levels in both oral and written competences by the time they enter the workforce;
- National governments should support higher education institutions in ensuring that vocational and language degree courses reflect the breadth of need for foreign languages by employers;
- National governments should ensure that employers' needs across all proficiency levels are reflected in school curricula, timetables, and assessment methods with appropriate recognition of oral and active communication skills;
- National governments should ensure that across the school system children are learning a range of foreign languages in addition to English taking account of the demand for most useful and second most useful foreign languages in their country/region;
- National governments should support schools and providers of initial VET to better align language learning with the foreign language needs of occupations they train students for.
- The European Commission and national governments should better inform individuals in compulsory education through careers advice and guidance about the distinct advantage in the labour market of being proficient, but also of having basic or intermediate skills in two foreign languages and encourage them to take advantage of language learning opportunities in school to develop these and to continue to maintain these competences.
- Providers of foreign language training should ensure that the training offers reflect the range of proficiency levels demanded by employers.

The European Commission should continue to promote the learning of two foreign languages in compulsory education and support initiatives to raise the effectiveness of language learning and teaching.

RESUME

Contexte Politique

L'objectif de Barcelone de 2002, qui visait à 'améliorer la maîtrise des compétences de base, en particulier par l'enseignement d'au moins deux langues étrangères dès le plus jeune âge', et à fournir aux jeunes des compétences en langues étrangères pour soutenir la croissance économique, a été prolongé à travers une série d'activités de la Commission européenne. Les principaux éléments en sont les suivants :

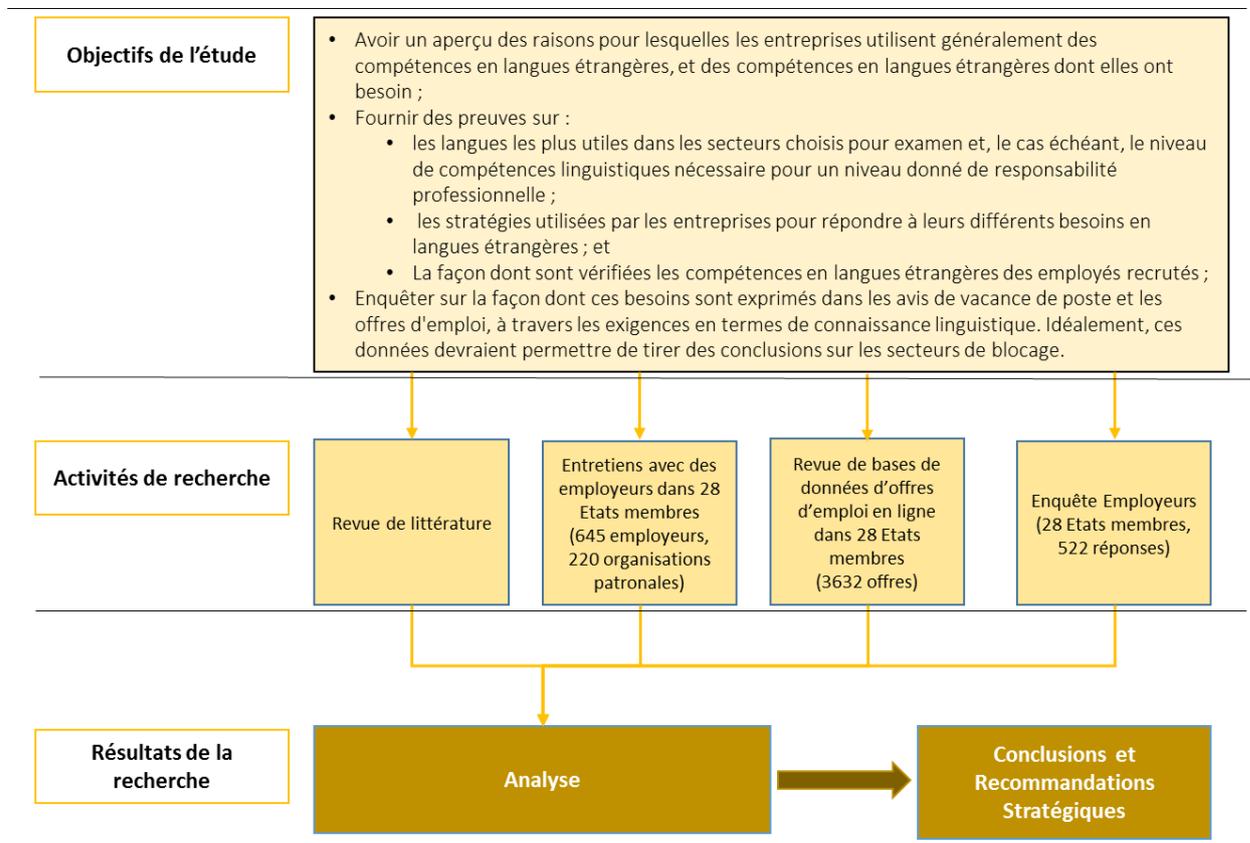
- Le Cadre Stratégique pour la Coopération Européenne dans le domaine de l'Éducation et de la Formation ('Éducation et Formation 2020');
- Repenser l'Éducation (2012) – mise en place pour soutenir la stratégie 'Éducation et Formation 2020'– qui identifie les aspects des systèmes européens d'éducation et de formation qui ne permettent pas de fournir les compétences clés pour l'employabilité;
- Un récent rapport provisoire commun sur les 'Nouvelles priorités pour la coopération européenne dans le domaine de l'éducation et de la formation', qui souligne la pertinence des compétences en langues étrangères – en parallèle d'autres compétences et attitudes essentielles – pour améliorer l'employabilité, l'innovation et la citoyenneté active.

Dans ce contexte, ce rapport présente les résultats d'une étude, commanditée par la DG EMPL, sur les relations entre la maîtrise des langues étrangères et l'employabilité dans les Etats Membres de l'Union européenne.

Objectifs de l'Étude et Activités de Recherche

Les objectifs de l'étude et les activités de recherche sont illustrés ci-dessous.

Aperçu général de l'étude : questions et activités de recherche



Ce résumé présente les principaux résultats des activités de recherche, ainsi que les conclusions et recommandations en découlant.

Compétences en langues étrangères et marché du travail : que sait-on des recherches existantes ?

L'étude a identifié et analysé en détail 16 études sur la demande de compétences en langues étrangères sur le marché du travail. Les principaux résultats qui en ressortent sont les suivants:

- L'échelle des besoins de compétences en langues étrangères est importante (exception faite probablement des pays anglophones): les études ont systématiquement montré qu'environ un-cinquième à un-quart des emplois requièrent un niveau avancé de compétences en langues étrangères (par ex. un niveau dépassant les connaissances basiques, et donc que les employeurs incluront dans la description des postes vacants);
- L'échelle des besoins augmente avec le niveau d'emploi (par ex. le niveau d'éducation requis pour effectuer le travail) : bien que de nombreux emplois occupés par des diplômés de l'enseignement supérieur requièrent une maîtrise des langues étrangères, peu des emplois intermédiaires ont de telles exigences, et relativement peu des emplois pour les personnes faiblement qualifiées;
- Tandis que l'anglais est demandé comme langue étrangère pour les affaires, ce n'est pas le cas pour tout le commerce international, particulièrement le commerce transfrontalier avec les pays voisins et le commerce avec les entreprises des grandes économies non-anglophones (à la fois dans et en dehors de l'UE), bien que la mesure de ce phénomène ne soit pas connue à travers l'UE;
- Les besoins en langues étrangères semblent différents selon les secteurs et semblent dépendre de la participation des entreprises au commerce transfrontalier. Des recherches existantes ont montré que les compétences en langues étrangères étaient le plus valorisées dans le secteur manufacturier/industriel et le moins valorisées dans les services publics. Il y a peu d'informations sur ces tendances et il n'y a pas de données détaillées sur la demande de langues étrangères par secteur commercial à travers l'Europe;
- Puisqu'un besoin faible de compétences en langues étrangères semble être associé à une concentration de l'entreprise sur le marché national,⁵ il semble raisonnable de s'attendre à ce que la demande soit plus forte de la part d'entreprises dans des pays avec des marchés intérieurs plus petits, sauf si les chaînes de distribution et les bénéfices accrus de la libre circulation des biens et des services au sein de l'UE apparaissent comme élargissant la demande de compétences en langues étrangères. Tandis que les entreprises qui utilisent les compétences en langues étrangères semblent en bénéficier, celles qui ne le font pas ne tirent peut-être pas profit de tout leur potentiel;
- Malgré cela, les compétences en langues étrangères ne sont pas aussi couramment perçues que d'autres compétences comme des compétences transversales essentielles pour les nouveaux entrants. Les langues étrangères sont cependant un prérequis pour certaines professions/activités. Il y a peu d'informations sur le niveau de compétences requis par les entreprises pour occuper des professions/activités;
- Il semble y avoir des bénéfices en termes d'employabilité pour les personnes avec des compétences linguistiques – autre que la mobilité – dans les secteurs où de telles compétences sont requises. Les entreprises valorisent les chercheurs d'emploi avec des compétences en langues étrangères, car les marchés internationaux poussent les forces de travail à être de plus en plus

⁵ COTANCE (2011), Rapport sur les besoins en langues dans les entreprises, Projet du Réseau CELAN.

multilingues et car le nombre de langues utilisées apparaît comme ayant une influence positive sur les succès à l'exportation⁶;

- Il y a peu d'informations sur la fréquence avec laquelle les employeurs évaluent les compétences linguistiques des recrues potentielles et quelles méthodes sont les plus utilisées, mais il y a une variété d'approches dans certains pays.

Globalement, la revue de littérature révèle un manque de recherche fournissant une vision globale de l'état des lieux de la demande, par le marché du travail, de la maîtrise en langues étrangères à travers les 28 Etats membres de l'UE.

Besoins commerciaux de compétences en langues étrangères

L'analyse des besoins commerciaux de compétences en langues étrangères est tirée d'entretiens avec des employeurs et d'une revue de bases de données d'emploi en ligne dans tous les Etats membres. L'étude a fait l'analyse des offres d'emploi en ligne placées dans les Etats membres du 15 aout au 15 septembre 2015.

L'usage des compétences linguistiques dans les entreprises

Les entretiens avec les employeurs réalisés pour cette étude indiquent que le besoin en maîtrise de langue étrangère dépend des tâches professionnelles et de la façon dont elles sont reliées aux six usages suivants de compétences en langues étrangères dans les entreprises : ventes, achats et marketing ; mise-en-œuvre et gestion des importations et exportations ; relations et communication internes ; collaboration à des projets transnationaux et communication au sein de communautés internationales de professionnels très spécialisées ; et utilisation d'outils et d'équipements.

Ces usages de compétences en langues étrangères et les fonctions professionnelles associées se retrouvent dans tous les secteurs examinés dans cette étude. L'utilisation d'une langue étrangère pour communiquer en interne dépend du fait que le secteur d'activités fait partie, ou appartient à, une entreprise multinationale. Quant aux autres usages mis en avant dans cette étude, la proportion des effectifs avec des fonctions professionnelles associées varie d'un secteur à l'autre.

Langues les plus utiles et pourquoi

L'anglais est de loin la langue la plus importante du commerce international et de la fourniture de services. Plus de quatre employeurs sur cinq interrogés et trois-quarts des offres d'emploi mises en ligne mettent en avant que c'est la langue la plus utile pour les emplois discutés/analysés dans tous les secteurs et dans presque tous les pays non-anglophones.

Pour un cinquième à un quart des employeurs, une langue autre que l'anglais est la langue étrangère la plus utile. Au niveau de l'UE, les trois langues autres que l'anglais qui sont mentionnées le plus souvent sont l'allemand, le français et le russe.

Les deuxièmes langues les plus utiles qui sont citées le plus souvent sont l'allemand, le russe, l'anglais, le français, l'espagnol et l'italien, sans claire majorité pour l'une de ces langues. Il y a des écarts dans la force de ce résultat selon les secteurs.

Au-delà des langues de pays et de marchés plus larges, les employeurs recherchent un large éventail d'autres langues plus petites. L'utilité des langues autres que l'anglais semble dépendre de la localisation des consommateurs et des partenaires commerciaux. Souvent, la langue que les employeurs considèrent comme la deuxième plus utile est

'L'allemand, car l'Allemagne est le plus grand partenaire économique de la Hongrie. La plupart des commandes viennent d'Allemagne'.¹

⁶ D'après le projet PIMLICO, 'la connaissance d'un certain nombre de langues, plutôt qu'une ou deux, peut faire toute la différence entre une performance moyenne et une performance exceptionnelle, et peut fournir un avantage concurrentiel vital' (p. 57).

la langue d'un pays voisin. Dans ce contexte, la demande de langues autres que l'anglais varie entre pays, et est similaire au sein des pays.

Niveau de maîtrise des langues étrangères habituellement requis

Dans l'ensemble, les employeurs ont tendance à demander un niveau de compétences plus élevé à l'oral qu'à l'écrit, pour les deux premières langues considérées les plus utiles. Les fonctions professionnelles qui requièrent le plus clairement des niveaux de compétences plus élevés à l'oral qu'à l'écrit sont celles qui ont un aspect important de service à la clientèle.

Pour la langue étrangère la plus utile, les employeurs interrogés demandent le plus souvent aux candidats d'avoir des niveaux de compétences en langue étrangère élevés (C1-C2) ou intermédiaires (B1-B2), leur permettant de communiquer efficacement avec des locuteurs natifs, même si les interactions sont limitées à des contextes familiers. Ce résultat est corroboré par la revue des offres d'emploi en ligne. Le niveau requis de compétences en langues étrangères pour la langue étrangère la plus utile est associé positivement avec le niveau d'emploi. Les emplois qui requièrent un diplôme d'enseignement supérieur ont tendance à avoir des exigences plus élevées en termes de langues étrangères.

Pour la deuxième langue étrangère la plus utile, les employeurs interrogés demandent le plus souvent des niveaux de compétence intermédiaires (B1-B2), à la fois à l'oral et à l'écrit. De la même façon, la revue des bases de données d'offres d'emploi en ligne indique que, pour les deuxièmes langues étrangères les plus utiles, un plus grand nombre d'employeurs se contentent d'un niveau de maîtrise plus faible (A1-A2), permettant aux travailleurs de transmettre des messages courts et simples, à la fois à l'écrit et à l'oral.

Comment les entreprises indiquent/spécifient-elles le niveau de compétence requis ?

Très peu parmi les employeurs interrogés et peu d'offres d'emploi mises en ligne⁷ utilisent les classifications formelles, comme le Cadre européen commun de référence pour les Langues (CECR), pour indiquer le niveau de compétence linguistique dans les offres d'emploi. De plus, la majorité des offres d'emploi ne font pas la différence entre les niveaux de compétences orales et écrites demandés. Les raisons régulièrement rapportées sont : les efforts qui sont nécessaires pour comprendre les classifications formelles (à la fois pour les employeurs et les candidats); le fait que les employeurs soient délibérément vagues sur les exigences en langues étrangères dans le but de ne pas décourager les candidats potentiels qui ne sont pas assurés de leurs compétences en langue étrangère; et un manque de conscience parmi les recruteurs et les employeurs.

Mesure dans laquelle les langues sont requises ou souhaitées par les employeurs

Lorsque les employeurs demandent au moins une langue étrangère, la langue étrangère la plus utile est plus souvent requise que seulement souhaitée. Presque toutes les offres d'emploi revues (plus de 9 sur 10) définissent la langue étrangère la plus utile comme un prérequis essentiel pour l'emploi, et ceci à travers tous les secteurs. Des compétences dans la deuxième langue la plus utile sont bien moins souvent demandées que des compétences dans la langue la plus utile. Il n'y a pas de relation claire entre le niveau d'emploi et la probabilité que la deuxième langue la plus utile soit requise pour cet emploi.

⁷ Une des exceptions était un portail slovaque, soutenu par le Ministère du Travail et le service public de l'emploi, qui utilise les niveaux CECR afin d'indiquer les compétences en langues étrangères demandées dans ses annonces d'offres d'emploi.

Comment les entreprises vérifient-elles les compétences linguistiques des recrues ?

La méthode la plus courante de vérification des compétences linguistiques, telle que rapportée par les personnes interrogées, consiste en des tests oraux, suivis par des tests à la fois écrits et oraux, une certification par des parties tierces, d'autres méthodes et, enfin, des tests écrits. Il existe un panel de méthodes que les employeurs utilisent pour vérifier la maîtrise des langues étrangères chez les candidats, comme analyser l'expérience internationale dans les CV ou se fier aux résultats scolaires ou aux attestations linguistiques délivrées par des services de tests. Relativement peu d'employeurs semblent utiliser les auto-évaluations d'Europass aux niveaux du CECR. L'analyse des offres d'emploi en ligne a montré que les attestations linguistiques étaient explicitement requises dans moins de 1% des offres. Tandis que certaines d'entre elles font généralement référence à tout type d'attestation, d'autres requièrent des attestations spécifiques (par ex. examens d'anglais de Cambridge, niveaux Berlitz, IELTS, TOEFL, attestations de fin d'études).

Que font les entreprises pour satisfaire leurs besoins en termes de langues étrangères ?

Un employeur sur cinq rapporte avoir recruté un locuteur natif (ressortissant étranger) sur les derniers 12 mois. La raison la plus fréquemment mentionnée pour recruter des locuteurs natifs est la difficulté à pourvoir des postes qui requièrent un haut niveau de maîtrise d'une langue spécifique et moins répandue.

La plupart des employeurs satisfont leurs besoins en termes de compétences en langues étrangères en recrutant des personnes avec les compétences demandées. Les formations visent principalement à améliorer les compétences linguistiques existantes, plutôt qu'à fournir des formations dans des nouvelles langues étrangères.

A quels problèmes les entreprises sont-elles confrontées pour satisfaire leurs besoins en termes de langues étrangères ?

Un-tiers des employeurs éprouvent des difficultés à pourvoir des postes à cause du manque de compétences en langues étrangères des candidats. Deux-tiers de ces difficultés sont dues à des niveaux insuffisants en langue étrangère des candidats à l'emploi, un-tiers est dû à l'incapacité à trouver des candidats appropriés avec une maîtrise d'une langue particulière.

La mesure dans laquelle les langues génèrent un avantage compétitif pour les entreprises

Environ un-quart des employeurs pensent que leurs concurrents ont un avantage compétitif du fait de leur réserve de compétences en langues étrangères, avec des variations d'un secteur à l'autre. Le secteur dans lequel les employeurs pensent que leur compétitivité est la moins affectée par la réserve de compétences en langues étrangères des concurrents est le secteur manufacturier (un employeur sur cinq).

Le marché dans lequel un avantage compétitif peut être obtenu grâce à une maîtrise des langues diffère d'un secteur à l'autre. Tandis qu'il s'agit clairement du marché intérieur dans le secteur de l'Hôtellerie et des activités de service culinaire, ce sont les marchés étrangers qui sont touchés par les réserves de compétences en langues étrangères des concurrents dans les secteurs du Transport et du stockage, des activités Professionnelles, Scientifiques et Techniques et dans le secteur Manufacturier. Dans le secteur du commerce de gros et de détail, les deux types de marché semblent être également touchés. L'avantage compétitif peut aussi venir d'une connaissance culturelle et de compétences linguistiques.

L'avantage comparatif des personnes avec une maîtrise des langues étrangères

Il y a des preuves claires selon lesquelles les compétences en langues étrangères sont un moteur de carrière – si elles font partie d'un éventail plus large de compétences (spécifiques) pertinentes. Combinées avec le bon bagage académique et une expérience professionnelle pertinente, les compétences en langues étrangères donnent accès à des emplois dans le commerce international et les services, pour lesquels elles sont un prérequis. Il y a aussi des preuves, bien que moins tranchées, selon lesquelles la maîtrise des langues étrangères facilite la progression de carrière.

"Les langues sont un atout important. Si vous êtes capable de parler plusieurs langues, votre carrière ne sera pas la même."¹

Analyse de l'Enquête Employeur

Presque tous les répondants à l'enquête sont fortement d'accord ou d'accord sur le fait que les compétences en langues étrangères aident à construire des relations plus efficaces avec les consommateurs et donnent de la valeur en termes de croissance. Conformément à cela, la plupart des employeurs sont en désaccord ou fortement en désaccord avec l'idée selon laquelle des produits ou des services de haute qualité ne requièrent pas de compétences en langues étrangères pour être vendus avec succès. Concernant l'offre de compétences en langues étrangères, la plupart des employeurs sont fortement d'accord ou d'accord sur le fait que les formations payées par les entreprises sont efficaces pour fournir aux employés les compétences en langues étrangères dont ils ont besoin pour leur travail. Sur la question de l'apport des systèmes d'éducation nationaux à l'offre de compétences en langues étrangères, il y a à peu près autant d'employeurs qui sont d'accord et qui sont en désaccord sur le fait que les systèmes d'éducation nationaux sont efficaces pour fournir aux entreprises les compétences en langues étrangères dont elles ont besoin.

Conclusions

9. Les besoins linguistiques dépendent des activités liées aux langues étrangères qui doivent être effectuées dans l'entreprise;
10. Le moteur le plus important des langues requises semble être la langue utilisée par les consommateurs, les clients et les partenaires;
11. Les recruteurs utilisent rarement les classifications formelles pour indiquer le niveau de compétence linguistique requis dans les offres d'emploi;
12. Les employeurs testent la maîtrise des langues étrangères des candidats le plus souvent lors des entretiens d'embauche. Il existe un vaste éventail de méthodes que les employeurs utilisent pour vérifier la maîtrise des langues étrangères des candidats, comme analyser l'expérience internationale dans les CV ou se fier aux résultats scolaires ou aux attestations linguistiques délivrées par des services de tests. Près de la moitié des employeurs interrogés, cependant, utilisent des tests oraux et évaluent les compétences des candidats en langues étrangères lors des entretiens d'embauche;
13. Le besoin de compétences en langues étrangères est principalement pourvu par le recrutement de nouveaux employés ayant les compétences nécessaires en langues étrangères;
14. Le recrutement de locuteurs natifs s'effectue principalement en relation avec des demandes de langues étrangères très spécifiques. Un quart des employeurs interrogés ont recruté un locuteur natif (ressortissant étranger) pour répondre à des besoins linguistiques sur les 12 derniers mois. Le recrutement de locuteurs natifs est principalement lié à la demande d'une langue particulière, qui n'est pas répandue ou insuffisamment disponible sur le marché de l'emploi national;
15. Les difficultés de recrutement (blocages) sont principalement dues à une maîtrise insuffisante des langues étrangères chez les candidats. Environ un tiers des employeurs éprouvent des difficultés à pourvoir les postes vacants car les candidats n'ont pas les compétences suffisantes en langues étrangères.

Deux-tiers de ces difficultés sont dues à un niveau insuffisant de compétences en langues étrangères, et un-tiers vient du manque de candidats maîtrisant une langue particulière;

16. Les compétences en langues étrangères donnent un avantage compétitif à la fois aux entreprises et aux chercheurs d'emploi – si elles font partie d'un éventail plus large de compétences utiles.

Recommandations Stratégiques

Cette étude formule des recommandations pour la Commission européenne, les gouvernements nationaux et les fournisseurs d'éducation en langue étrangère, y compris les employeurs, en se basant sur les conclusions tirées de l'analyse des entretiens avec les employeurs, de la revue des offres d'emploi en ligne et de l'enquête employeur. Les recommandations sont partagées entre celles concernant l'emploi et la formation tout au long de la vie, et celles concernant l'enseignement.

Recommandations pour le soutien aux employeurs et aux personnes sur le marché du travail

- Les employeurs devraient proposer des formations en cours d'emploi lorsque les compétences linguistiques des employés ne correspondent pas aux besoins professionnels, ou pour les compétences de plus haut niveau qui sont attendues dans les rôles pour lesquels ils pourraient être promus;
- Les gouvernements nationaux et les services publics de l'emploi devraient mieux informer les employeurs sur les niveaux de compétence qu'ils sont en droit d'attendre de la part des jeunes à l'issue des différents cycles/niveaux d'enseignement, afin qu'ils puissent définir leurs politiques de formation en conséquence;
- Les gouvernements nationaux, les services d'orientation professionnelle et les services publics de l'emploi devraient informer les employés, les chercheurs d'emploi et les nouveaux entrants sur l'avantage spécifique que confèrent des compétences en langues étrangères sur le marché du travail, et les encourager à profiter des opportunités existantes de formation pour adultes pour maintenir et développer les compétences en langues étrangères qu'ils ont acquises à l'école et qu'ils n'utilisent pas régulièrement;
- De la même façon, les employeurs devraient encourager les employés à profiter davantage des opportunités existantes de formation pour adultes pour maintenir et développer les compétences en langues étrangères qu'ils ont acquises à l'école et qu'ils n'utilisent pas régulièrement;
- La Commission européenne, les gouvernements nationaux et les services publics de l'emploi devraient mieux informer les employeurs ayant besoin de compétences linguistiques sur l'enseignement des langues et les méthodes d'évaluation standardisées qu'ils pourraient utiliser;
- La Commission européenne, les gouvernements nationaux et les services publics de l'emploi devraient encourager les employeurs à fournir des certifications et de la documentation sur les compétences en langues étrangères de leurs employés, sur la base des formations offertes ou des évaluations menées, afin que cette information soit disponible pour les futurs employeurs. Des résultats d'évaluation fiables présupposeraient l'usage de cadres d'évaluation formels par les employeurs, ce qui n'est pas le cas actuellement;
- La Commission européenne, les gouvernements nationaux et les services publics de l'emploi devraient promouvoir l'usage du CECR parmi les employeurs comme un outil facilement accessible qui peut aider à exprimer et documenter les besoins professionnels en langues étrangères;
- La Commission européenne, les gouvernements nationaux, les services publics de l'emploi et les employeurs devraient promouvoir l'usage du CECR parmi les chercheurs d'emploi comme un outil (d'auto-évaluation) facilement accessible, qui peut aider à fournir aux employeurs des informations pertinentes sur la maîtrise des langues étrangères acquises à l'école ou lors d'emplois précédents.

Recommandations pour le soutien aux écoles, à la FPI, aux institutions d'enseignement supérieur et aux personnes encore en formation

- Les gouvernements nationaux devraient encourager les institutions d'enseignement supérieur à aider les étudiants à maintenir et améliorer leurs compétences linguistiques lorsqu'ils ne les utilisent pas régulièrement dans leurs études, par exemple au travers des formations linguistiques accréditées ou non;
- Les gouvernements nationaux devraient soutenir les écoles et les institutions d'enseignement supérieur à s'assurer que les apprenants peuvent atteindre des niveaux de compétences d'utilisateur indépendant (B1 et B2) ou expérimenté (C1 et C2), à la fois à l'oral et à l'écrit, lorsqu'ils entrent sur le marché du travail;
- Les gouvernements nationaux devraient soutenir les institutions d'enseignement supérieur à s'assurer que les cours de langue et les formations professionnelles reflètent l'éventail des besoins en langues étrangères des employeurs;
- Les gouvernements nationaux devraient s'assurer que les besoins des employeurs à tous les niveaux de maîtrise sont reflétés dans les programmes et calendriers scolaires, et dans les méthodes d'évaluation avec une reconnaissance appropriée des compétences de communication orales et écrites;
- Les gouvernements nationaux devraient s'assurer qu'à travers le système scolaire les enfants apprennent un éventail de langues étrangères, en plus de l'anglais, en prenant en compte la demande en termes de langues étrangères les plus utiles et les deuxièmes plus utiles dans leur pays/région;
- Les gouvernements nationaux devraient soutenir les écoles et les fournisseurs de formation professionnelle initiale (FPI), afin de mieux aligner l'apprentissage des langues avec les besoins en langues étrangères des postes pour lesquels ils forment des étudiants;
- La Commission européenne et les gouvernements nationaux devraient mieux informer les personnes au sein de l'enseignement obligatoire avec des conseils et de l'accompagnement de carrière sur les avantages spécifiques, sur le marché du travail, qui sont liés à la maîtrise, mais aussi à la possession de compétences de base ou intermédiaires dans deux langues étrangères, et les encourager à profiter davantage des opportunités d'apprentissage des langues à l'école pour les développer et continuer à maintenir ces compétences;
- Les fournisseurs de formation en langues étrangères devraient s'assurer que les formations offertes reflètent l'éventail des niveaux de maîtrise requis par les employeurs;
- La Commission européenne devrait continuer à promouvoir l'apprentissage de deux langues étrangères dans l'enseignement obligatoire, et soutenir les initiatives qui contribuent à améliorer de façon efficace l'apprentissage et l'enseignement des langues.

1 INTRODUCTION

In the last decade the Commission has devoted many efforts to meet the 2002 Barcelona objective '*to improve the mastery of basic skills in particular by teaching at least two foreign languages from a very early age*' and to provide young people with foreign language competences that will support economic growth.

The Strategic Framework for European Cooperation in Education and Training (ET2020)⁸ calls for a transformation of education and training throughout Europe to deliver the knowledge and skills needed for growth, employment and participation in society. More specifically, the recently released draft joint report on the '*New priorities for European cooperation in education and training*' underlines the relevance of foreign language competences – along with other key competences and attitudes - to enhance employability, innovation and active citizenship.⁹

Rethinking Education¹⁰ (2012) - launched to support the ET2020 strategy - identified aspects of European education and training systems that continue to fall short in providing the right skills for employability, and are not working adequately with business or employers to bring the learning experience closer to the reality of the working environment.

Both ET2020 and Rethinking Education highlight the importance of language skills. Within the strategic objective to improve the quality and efficiency of education and training, ET2020 calls for work to: enable citizens to communicate in two languages in addition to their mother tongue, promote language teaching, where relevant, in vocational education and training (VET) and for adult learners, and provide migrants with opportunities to learn the language of the host country.

In the context of meeting increasing demand for higher skills and reducing unemployment, Rethinking Education stresses the importance of language learning for jobs and reducing obstacles to mobility. It says that the ability to speak foreign languages is a factor in business competitiveness, and that languages are becoming more important to employability, mobility and growth.

One of the priorities in Rethinking Education signalled for Member States is to strengthen the provision of transversal skills, such as foreign languages (across all curricula from early stages of education up to higher education) that increase employability.

1.1 Objectives and scope of the study

Against this background, this report presents the result of a study on the relationship between foreign language proficiency and employability in European Member States commissioned by DG EMPL. The study's objectives were:

- To obtain an overview of the purposes for which businesses typically use foreign language skills and which foreign language skills they need;
- To deliver evidence as to:

⁸ Council conclusions of 12 May 2009 on a strategic framework for European cooperation in education and training (ET 2020), OJEC C 119, 28/05/2009 P.2–10

⁹ Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions: Draft 2015 Joint Report of the Council and the Commission on the implementation of the Strategic framework for European cooperation in education and training (ET2020). New priorities for European cooperation in education and training, 26.8.2015 COM (2015) 408 final.

¹⁰ Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions: Rethinking Education: investing in skills for better socio-economic outcomes, 20.11.2012 COM (2012) 669 final.

- which languages are most useful in the sectors chosen for review and, if relevant, what level of language skills are needed for what level of job responsibility;
- which strategies are used by businesses to meet their various foreign language needs; and
- how they verify the foreign language skills of hired employees;
- To investigate how these needs are expressed in vacancy notices and job advertisements through requirements of language knowledge. Ideally, this data should allow conclusions about bottleneck sectors.

Overall, the study assesses the role of language competences in gaining employment in the EU and to what extent they present a distinct advantage to the job seeker.

The study covers all 28 EU Member States and focuses on the foreign language needs of businesses which value foreign language skills. It does therefore not assess how many businesses do not value the foreign language skills of their employees and why. As a result of an analysis of Eurostat data on levels of intra and extra EU import and export activities and the implied potential for a high need for foreign language skills, the study focused research on the following five sectors:¹¹

- Manufacturing (NACE¹² C);
- Transportation and storage (NACE H);
- Accommodation and food service activities (NACE I);
- Wholesale and retail trade; repair of motor vehicles and motorcycles (NACE G); and
- Professional, scientific and technical activities (NACE M).

1.2 Structure of the report

The report is structured as follows: Section 2 introduces the data collected in the framework of this study and presents the methodology used to collect and process them. Section 3 then summarises the findings of the review of the literature on the role of foreign language skills in the labour market.

The analysis presented in Section 4 and Section 5 of this report is based on the two main data sources collected during this study. Section 4 presents the analysis of the data collected during interviews with employers and employer organisations; Section 5 analyses the data collected during the online vacancy database review.

Section 6 describes the results of the complementary survey of employers, which was carried out to fill gaps in knowledge and understanding which emerged from the analysis of the interviews with employers and employer organisations, and the review of vacancy notices.

Section 7 compares the findings from the interviews with employers and employer organisations and the online vacancy database review.

Section 8 summarises the findings of this study, recalls what is known about the supply of foreign language proficiencies in the labour market, and discusses what this

¹¹ See *Annex 1: Selection of business sectors* for a detailed analysis of Eurostat data leading to the selection of the five sectors.

¹² The Statistical classification of economic activities in the European Community is abbreviated as NACE according to the French *Nomenclature statistique des Activités économiques dans la Communauté Européenne*.

interplay of supply and demand implies for employers and the education and training system.

Section 9 presents recommendations for policy makers and providers of foreign language learning.

2 DATA AND METHODOLOGY

For this study, three sets of data were collected to build on the evidence found from a review of the literature: data from interviews with employers and employer organisations, data collected through a review of online vacancy databases; and data from a survey of employers.

The literature review was based on a review protocol setting out specific review questions, and a search strategy. No specific inclusion criteria were defined.

The research questions which guided the literature review were:

- What is the scale of demand for foreign language skills in the labour market?
- Which languages are in demand?
- Does demand for foreign language proficiency differ by employer?
- What foreign language skills are needed for what job roles?
- To what extent are foreign language skills a career driver and an essential job-related competence?
- Do proficient applicants have a competitive advantage?
- How do employers verify foreign language proficiency of job applicants?

The protocol set out the journal databases and other sources to be consulted and the search terms. The review resulted in a list of 16 studies (see Annex Table 5) used to inform the design and research questions of this study.

The following sections present the three sets of data and the methodology used to collect and process it.

2.1 Data source one: interviews with employers and employer organisations

Interviews with employers and employer organisations were semi-structured and on average took between 20-30 minutes. An interview guide with core questions to be covered during the interview was provided to country researchers with the guidance note. Relevant employers were contacted on the basis of a screening of vacancy notices expressing foreign language needs in online vacancy databases. Relevant employer organisations were identified through desk research.

A total of 895 interviews were conducted in the 28 EU Member States, including 645 interviews with employers and 250 interviews with employer associations, sector bodies and other organisations, such as chambers of commerce, employment services or sector bodies.¹³

The distribution of interviewees across sectors was balanced, as shown in Table 1.

Table 1: Number of interviews per sector

Sector	Employers	Employer associations, sector bodies	Total
Manufacturing	135	48	183
Transportation and storage	121	50	171

Sector	Employers	Employer associations, sector bodies	Total
Accommodation and food service activities	121	49	170
Wholesale and retail trade; repair of motor vehicles and motorcycles	131	33	164
Professional, scientific and technical activities	137	40	177
Sector overarching		30	30
TOTAL	645	250	895

In most countries the number of interviews conducted was 30, in some countries this was more.¹⁴

Two different types of data provided by country researchers were used to produce the qualitative analysis presented in Section 4: a systematic record of answers to the core questions from all employer interviews and a country summary report.

Country researchers coded employers' answers to the core questions contained in the interview guide to an Excel spreadsheet prepared by the project management team. These data were then merged into a data set covering all countries. The answers of interviews with employer associations are not contained in this dataset as these interviews were more general and no specific vacancy or position was discussed. Unless indicated otherwise the analysis of this data presented in Section 4 is based on unweighted data, giving equal weight to each employer. The variables included in this data set are:

Table 2: Variables systematically recorded in all employer interviews

Type of variable	Variable	Values
Background variables	Country	EU 28 (BE-nl and BE-fr for Belgium)
	Sector	5 selected sectors
	Size of enterprise in location and Europe wide (if relevant)	1-49; 50-249; >249
	Years of work experience required	0-1; 2-5; 6-15, >15
	An indicator whether a higher education degree is required to do the job	Yes/No
Variables related to language proficiency	The job title	
	Name of most useful foreign language for job	
	Name of second most useful foreign language for job	
	An indicator whether the most	Yes/No

¹⁴ 31 in DK, HU, LT, MT and UK, 32 in EL, 33 in EE, LV and SI, 34 in FI and 35 in ES.

Study on Foreign Language Proficiency and Employability

Type of variable	Variable	Values
	useful foreign language is required or desired	
	An indicator whether the second most useful foreign language is required or desired	Yes/No
	The required/desired level of the most useful foreign language	High, Medium, Low as defined in Section 4.4.1
	The required/desired level of the most useful foreign language	High, Medium, Low as defined in Section 4.4.1
Variables related to difficulty of filling positions (bottlenecks)	An indicator whether the position is currently hard to fill as a result of applicants' lack of foreign language skills	Yes/No
	An indicator whether the position is currently hard to fill because of an insufficient level of foreign language skills available in the labour market or a lack a particular language	Insufficient level/Particular language
	The past level of difficulty in filling this kind of position	Less, Same, More
	The future level of difficulty in filling this kind of position	Less, Same, More
	An indicator whether the interviewee hired a foreign national in the past 12 months in order to fill a foreign language bottleneck position	Yes/No
Variables related to languages as a comparative advantage	An indicator whether the interviewee feels that competitors have an advantage because of their foreign language skills	Yes/No
	An indicator whether this advantage is related to the domestic, the foreign market or both	Domestic market, Foreign market, Both
	Importance of foreign language skills for applicants to get the job	Unimportant, Of little importance, Moderately important, Important, Very important
	An indicator whether foreign language skills are expendable if applicants fulfil all other requirements	Yes/No
	The foreign language verification method most important in the enterprise	Oral test, Written test, Oral and written test, Certification by third parties, Other

Descriptive statistics of the main background variables can be found in *Annex 3: Descriptive statistics of data collected*.

Country researchers provided a draft summary report of their findings, including an analysis with useful illustrations and quotes related to the following research questions:

- What is the purpose of language skills in enterprises?
- Which are the most useful languages and why?
- What is the level of foreign language proficiency usually required/desired and why?
- How do enterprises indicate/specify the level of competence required?
- Is foreign language proficiency mostly 'required/essential' or 'desired' and why?
- How do enterprises verify the language skills of recruits?
- What are enterprises doing to meet their needs in relation to foreign languages?
- What challenges do enterprises face in meeting their needs for foreign language skills?
- Do employers feel that the enterprise's stock of foreign language skills affects their competitiveness?
- To what extent are language skills a career driver?

2.2 Data source two: Review of online vacancy databases

The data on which Section 5 is based was collected from online vacancy databases in each EU Member State (separately for Flanders and Wallonia) between 15 August and 15 September 2015. Country researchers were asked to review 125 vacancy notices, approximately 25 in each of the five sectors covered by this study, depending on availability. Country researchers were instructed not to use search terms which bias the results with regard to the languages demanded and the level (e.g. "German", "proficiency in Russian", "excellent English writing skills"). Researchers were allowed to use search terms such as the name of the sector as well as "foreign" and "language". If 25 vacancy notices requiring foreign language skills were not available in a given country and sector, researchers were asked to compensate this with a review of additional vacancy notices in another sector.

A total of 3632 vacancies were reviewed, with a reasonable balance across sectors (see Table 3). This included 125 vacancies from each country with the exception of four countries with a slightly higher number of vacancies reviewed.¹⁵ The analysis of this data presented in Section 5 is based on unweighted data unless indicated otherwise, giving equal weight to each employer.

Table 3: Number of vacancies reviewed per sector

Sector	Number of vacancies reviewed
Manufacturing	722
Transportation and storage	677
Accommodation and food service activities	688
Wholesale and retail trade; repair of motor vehicles and motorcycles	715

¹⁵ Hungary and Ireland (126, each), Bulgaria (127) and Portugal (128).

Sector	Number of vacancies reviewed
Professional, scientific and technical activities	830
TOTAL	3632

The following information was recorded if available:

Background variables:

- Sector/industry of business;
- Job title;
- Higher education degree required or not;
- Numbers of years' experience required;
- Description of tasks to be performed more generally, not explicitly foreign language related.

Foreign language related variables:

- Foreign language(s); and whether required/desired¹⁶;
- Words used to describe required/desired foreign language level;
- Description of tasks to be performed in foreign language, if explicitly stated;
- International experience required/desired for job and whether international experience is mentioned instead of language requirements;
- Type of language certification accepted/required;
- Does the vacancy mention the Common European Framework of Reference for Languages (CEFR) or use its levels to indicate foreign language requirements (e.g. B1, B2)
- Does the vacancy ask for the submission of a CV in Europass format?

Descriptive statistics of the main background variables can be found in *Annex 3: Descriptive statistics of data collected*.

The following observations on how employers express their needs for foreign language skills in vacancy notices have implications for how the data was processed for analysis:

- The majority of vacancy notices use a variety of descriptive terms which indicate various proficiency levels. However, some do not indicate the level of foreign language skills required/desired or use very ambiguous expressions, such as "knowledge of".
- Around three quarters of vacancy notices do not distinguish between the level of oral and written foreign language skills required/desired for the job.

For the analysis presented in Section 5.2 the words and expressions used by employers to describe the level of foreign language proficiency required or desired for the job was mapped, whenever possible, to the three proficiency levels – low, medium and high – used in this study.

¹⁶ Whether the foreign language was desired or required was coded by the country researcher on the basis of the wording used, such as "[name of foreign language] imperative" or "[name of foreign language] indispensable" for required and "mastery of [name of foreign language] is a plus" or "fluency in [name of foreign language] is a distinct advantage".

The majority of employers use similar words and expressions to describe the level of foreign language proficiency, and use nouns, adverbs or adjectives which indicate various proficiency levels quite accurately, as depicted in Table 4. Around 80% (2850) of vacancy notices could be mapped using this methodology. The remaining vacancy notices used words or expressions which were too ambiguous to be mapped (e.g. "knowledge of English", "English", "English language skills").

Only about one quarter of employers specify the level of written language proficiency that is required or desired for the advertised job. Three quarters make no distinction between the oral and written level they require/desire. Very few explicitly state that they only require/desire only oral or only written foreign language skills. When no distinction was made, the level was only mapped for oral skills. The figures referring to written foreign language skills are based on the vacancy notices which explicitly mentioned the level of written proficiency required/desired. This needs to be taken into account when interpreting the data as those vacancy notices explicitly mentioning the required level of written skills may not be a representative sample. Rather, it is very likely that the jobs associated with these advertisements are jobs for which written skills are particularly important.¹⁷

Table 4: Mapping of words and expressions in vacancy notices to language proficiency levels

Words and expressions	Proficiency level
Minimum level	LOW
Passive knowledge	
Basic knowledge	
Make yourself understandable	
Must be able to understand and express oneself	
Partial knowledge	
Simple conversation level	
Intermediate	MEDIUM
Active knowledge	
Working knowledge	
Conversational skills	
Express oneself well	
Comfortable	
Good	
- knowledge	
- proficiency	
- command	
- practice	
- technical level	
Proficiency	HIGH

¹⁷ Asked why many vacancy notices do not distinguish between oral and written skills in their description of required levels, one employer respondent stated that "Often the level of proficiency required is not so decisive [...]. If perfect mastery of the language is needed, it will be out in the ad." Source: survey of employers. For more details see Section 2.3 and Section 6.

Words and expressions	Proficiency level
Bilingual	
Advanced knowledge	
Confidence	
Business level	
Excellent	
Fluent	
High level	
Great command	
Native speaker	
Master oral and written language	
Very good knowledge	
Knowledge of (name of language)	Too ambiguous to be mapped
Operational in several language areas	
Language skills	

Vacancy notices' description of tasks to be performed in the foreign language was used to determine the purpose of the foreign language in the advertised job. Based on the interviews with employers and employer organisations these broad purposes across all sectors are:

- Sales, purchase and marketing;
- Execution and administration of imports and exports;
- Internal relations and communication in multinational companies;
- Customer service;
- Collaboration on transnational projects, and communication within international communities of highly specialised professionals;
- The use of tools and equipment.

For 84% of vacancy notices a description of the tasks to be performed in a foreign language, such as "to communicate with international business and leisure guests over the phone, guiding them through their reservations experience" was not available. In these cases, if obvious, general information on job tasks, such as "communication with hotel guests", was used to indirectly determine the (highly likely) purpose of foreign language skills. For 18% (651) of vacancy notices information was insufficient to determine the purpose of the foreign language in the job with a high degree of certainty, and consequently they were not included in analyses relating to the six purposes.

2.3 Data source three: complementary survey

The survey of employers identified from the vacancy notices aimed to complement the information collected through the interviews and review of vacancy notices. It collected information on employers' opinion on the following issues:

- The effectiveness of the national education system in equipping the labour force with the needed foreign language skills;
- The effectiveness of company-paid foreign language training provided by the company to its employees (if any);

- The added value of foreign language skills for the company in terms of growth and building more effective relationships with customers;
- The reasons for using interviews in the required/desired foreign language – rather than other methods- for testing job applicants’ foreign language proficiency;
- The reasons why employers often do not differentiate oral and written foreign language level in online vacancy notices.

The survey was created with SNAP Survey Software. To ensure a good response rate, the survey was kept short, simple and anonymous and limited to the questions above. The estimated time to complete it was under 5 minutes.

The English master questionnaire and the invitation e-mail were translated into 22 EU official languages by country researchers.¹⁸ Employers were given the option of responding online or directly in the e-mail. Country researchers forwarded the responses given by e-mail to the core team, which subsequently entered responses into the database. Reminders were sent and follow up calls were made in the countries where the initial response rate was considered low.

The survey was open for five weeks, from the 21st of September to the 23rd of October.

The employers invited to participate in the survey were those identified during the interview phase of the study and the review of the vacancy notices. The number of employers invited to participate in the survey varied by country, due to varying practices with regard to publishing contact details in vacancy notices. Table 5 summarises the number of employers invited to complete the survey by country.

Table 5: Number of employers invited to the survey, by country

Country	Total employers invited	Response*
AT	151	38 (for German as a whole)
BE-fr	129	18 (for French as a whole)
BE-nl	118	26 (for Dutch as a whole)
BG	66	19
CY	126	28 (for Greek as a whole)
CZ	145	19
DE	120	38 (for German as a whole)
DK	95	19
EE	151	24
EL	126	28 (for Greek as a whole)
ES	42	13
FI	146	27
FR	66	18 (for French as a whole)
HR	139	9
HU	143	15
IE	132	59 (for English as a whole)

¹⁸ BU, CZ, DE, DK, EE, EL, EN, ES, FI, FR, HR, HU, IT, LV, LT, NL, PL, PT, RO, SI, SK, SE.

IT	93	16
LT	142	21
LU	135	38 (for German as a whole) 18 (for French as a whole)
LV	132	17
MT	139	59 (for English as a whole)
NL	142	26 (for Dutch as a whole)
PL	145	28
PT	135	35
RO	28	14
SE	73	17
SI	147	26
SK	138	34
UK	135	59 (for English as a whole)
TOTAL	3479	522

* The survey was anonymous. Responses per country are proxied by the language used to fill in the survey. Responses from countries with the same official languages cannot be assessed separately. It can also not be excluded that some employers responded in English although not their native language.

The overall number of responses was 522, which corresponds to a response rate of 15%.

3 WHAT DOES THE RESEARCH EVIDENCE SAY ABOUT FOREIGN LANGUAGE SKILLS IN THE LABOUR MARKET

This section presents a review of 16 studies on the demand for foreign language skills in the labour market identified during the literature review. The section is structured along the research questions which guided the literature review, which were:

- What is the scale of demand for foreign language skills in the labour market?
- Which languages are in demand?
- Does demand for foreign language proficiency differ by employer?
- What foreign language skills are needed for what job roles?
- To what extent are foreign language skills a career driver and an essential job-related competence?
- Do proficient applicants have a competitive advantage?
- How do employers verify foreign language proficiency of job applicants?

A summary of the findings of the studies reviewed in table format can be found in Annex Table 5.

3.1.1 The scale of the demand

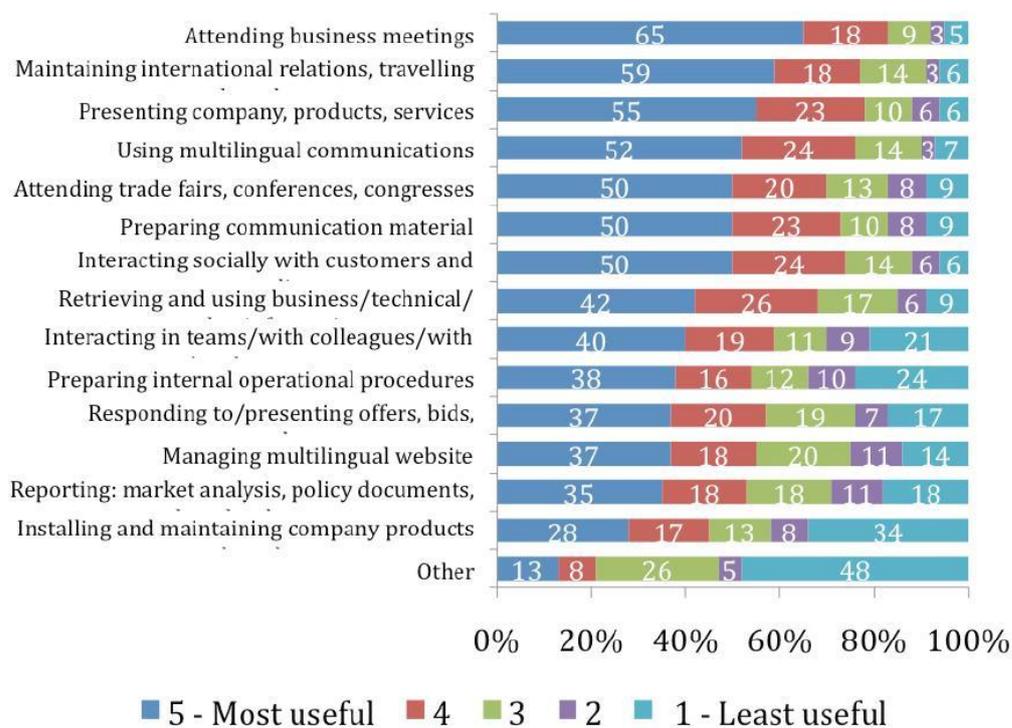
The 'Languages for Jobs' report by the thematic working group under the European Strategic Framework for Education and Training (ET 2020) found that the demand for foreign languages and communication skills is steadily rising on the European labour market.¹⁹ This view is supported by the evidence provided by various recent studies on the role of foreign language skills in the European labour market. The CELAN project (2011), for example, developed and administered a questionnaire to identify

¹⁹ Thematic working group "Languages for Jobs" ET 2020 / DG EAC (2011), Languages for Jobs: providing multilingual communication skills for the labour market.

the language needs of companies.²⁰ The survey targeted individual firms of all sizes and sectors, achieving 543 responses from 29 European countries, as well as business representative organisations across Europe (157 responses). According to the results of the survey, 90% of businesses say that knowledge of foreign languages matters for operational reasons or for competing in the market. Businesses need foreign languages to boost sales and marketing, to manage cross border supply chains and to successfully export services and finished goods.²¹ Firms that do not consider foreign languages essential for their business tend to be focused only on domestic markets.

The CELAN study also shows that some specific business activities more commonly require foreign languages. Foreign languages are most often required for external activities such as attending business meetings, maintaining international relations or presenting the company and its products and services. Foreign languages are less important – but not unimportant – for more internal functions (see Figure 1).

Figure 1: Business activities where foreign languages are most useful



Source: CELAN final report (2011)

In a similar way, the CBI/Pearson Education and Skills survey (2015) inquired about the skills needs of UK employers, obtaining responses of 300 employers across all business sizes, sectors and regions of the UK. In this case, 45% of employers said that they value foreign language skills among their employees.²² Businesses considered that foreign languages are most useful in helping build relationships with clients,

²⁰ COTANCE (2011), Report on language needs in business, CELAN Network Project. http://www.celan-platform.eu/assets/files/D1.3-Business_Needs_Report-Final.pdf

²¹ DG EAC (2008), Languages Mean Business, Companies work better with languages, Recommendations from the Business Forum for Multilingualism established by the European Commission.

²² The Confederation of British Industry's (CBI) 2013 *Education and Skills Survey* finds a similar figure: 70% of responding business value language skills among their employees.

customers and suppliers (36%), but also assisting staff mobility within the organisation and facilitating international working (26%).²³

The 2011 PIMLICO project identified and described models of best practice in 40 European small and medium-sized enterprises (SME) which had language management strategies considered to have a positive effect on trade growth.²⁴ The PIMLICO case studies led to the conclusion that employees of international businesses who are engaging in client, customer or supplier relations are expected to have *fluency*, characterised by the *ability to negotiate*. However, the CBI Education and Skills survey from 2010 found that not just fluency is in demand, but that two thirds of (UK) employers are interested in employees' *basic conversational ability*.²⁵

3.1.2 Which languages are in demand?

With regard to what languages are required by businesses, studies invariably find that English at an advanced level is increasingly considered a necessary, basic skill.

Didiot-Cook, Gauthier & Scheirlinckx (2000) combined a quantitative analysis of 88 internship evaluation forms of students from the Community of European Management Schools (CEMS) with 34 semi-structured interviews of company representatives from the UK, Germany, Belgium, and Netherlands.²⁶ One of their main conclusions was that, when recruiting, companies expect at least an advanced level of English. Another foreign language was found to be either required or a major benefit. The level of the second foreign language can usually be lower than the one for English, but not when the role involves dealing with clients. Overall, the researchers suggest that although both are important, oral skills are valued more than written ones by recruiters. Reading and writing are more often required in consulting and finance than in other sectors (manufacturing, marketing, and other).

The ELAN study (2006) included a survey of nearly 2,000 exporting SMEs across 29 European states (EU, EEA and candidate countries) and a survey of 30 multinational companies.²⁷ The study analysed the use of languages for major export markets. It concluded that although the use of English prevails (51% of companies), other languages are also frequently used (mainly, German, French, Russian, and Spanish). The researchers found that the most widely spoken languages are often used as *intermediary languages*. For example, English was used by the companies surveyed to trade in over 20 different markets, including English speaking countries. German was

²³ CBI/Pearson (2015), Inspiring Growth, Education and skills survey 2012, <http://news.cbi.org.uk/reports/education-and-skills-survey-2015/education-and-skills-survey-2015/>

²⁴ DG EAC / Tipik / Semantica Ltd (2011), *Report on Language Management Strategies and Best Practice in European SMEs: The PIMLICO Project*. http://ec.europa.eu/languages/policy/strategic-framework/documents/pimlico-full-report_en.pdf.

²⁵ CBI (2010), *Ready to grow: business priorities for education and skills. Education and skills survey 2010*. <http://www.educationandemployers.org/wp-content/uploads/2014/06/ready-to-grow-cbi.pdf>. Please note that "conversational ability" is considered to be at the intermediate level of foreign language proficiency in this study, as indicated in Table 4: Mapping of words and expressions in vacancy notices to language proficiency levels Table 4 .

²⁶ Didiot-Cook, H., Gauthier, V. & Scheirlinckx, K. (2000), *Language needs in business, a survey of European multinational companies*. CEMS Inter-faculty Group for Languages Joint Study Project, <http://www.hec.edu/var/fre/storage/original/application/7ca31409fee3f05c77b4a3d9286927d2.pdf>

²⁷ DG EAC (2006), *ELAN study: Effects on the European Union Economy of Shortages of Foreign Language Skills in Enterprise*. http://ec.europa.eu/languages/policy/strategic-framework/documents/elan_en.pdf

used for exporting to 15 markets (including Germany and Austria).²⁸ Russian was used to trade in the Baltic States, Poland and Bulgaria, and French was used in eight markets, including France, Belgium and Luxembourg.

However, despite the general importance of intermediary languages in cross border trade activities, the CELAN study underlines the importance that EU firms attach to knowledge of the languages of neighbouring EU countries for building relations with clients, customers and suppliers.

More recently, the French LEMP study analysed foreign language demand based on an online survey among 801 companies, semi-structured interviews with employers and an analysis of vacancies. English prevails as the most demanded language, followed by German, Spanish and Italian. However, a large number of foreign languages were mentioned by employers. A total of 21 (from the survey) and 22 (from the vacancy review) different languages were mentioned by enterprises.²⁹

Similar results can be observed in UK studies. Tinsley and Board (2013) examined which languages are most needed in the UK and why in a study commissioned by the British Council.³⁰ Based on the responses to the Confederation of British Industry's 2013 *Education and Skills Survey*³¹ they find that German, French and Spanish are the most important foreign languages for business for firms in the UK.³²

In a study by the British Academy, Tinsley (2013) reached similar results by reviewing a variety of sources on the demand of foreign language skills in the UK.³³ The study reports that French, German, and Spanish account for around half of the demand for foreign language skills in the UK. Mandarin, Arabic and Russian (and to a lesser extent Turkish, Farsi and Polish) are also in demand in addition to – not instead of – Western European languages.

In Ireland, McNaboe et al. (2015) analysed the languages most often cited in vacancy notifications in 2014 for both IrishJobs.ie and Department of Social Protection (DSP) Jobs Ireland. Similarly to what was found in UK studies, German was the most commonly mentioned language, followed by French, Spanish and Dutch.

3.1.3 Does demand for foreign language proficiency differ by employer?

One recurring finding in the literature is that the demand for foreign language skills increases with firm size.³⁴ This is most likely to be because of the correlation of firm

²⁸ For example, Austrian research suggests that German and Russian are still frequently used for doing business in Central and Eastern Europe. The same is true in Sweden, Germany, Denmark Switzerland and France: Tritscher-Archan / Institut für Bildungsforschung der Wirtschaft (2008), *Fremdsprachen für die Wirtschaft*.

²⁹ Chancelade, C. et al. (2015), *Lemp – Langues et employabilité*. [³⁰ Tinsley & Board \(2013\), *Languages for the Future: Which languages the UK needs most and why*, British Council](http://www.ciep.fr/expertise-audit-langues/langues-etrangeres-The LEMP study was conducted by the Direction générale de l'enseignement scolaire (DGESCO), Centre d'étude et-mobilite/langues-employabilite de recherches sur les qualifications – Institut de recherche sur l'éducation (Cereq-IREDU), and Centre international d'études pédagogiques (CIEP) with financial support from the European Commission.</p></div><div data-bbox=)

³¹ Confederation of British Industry and Pearson (2013), *Changing the Pace*. CBI/Pearson Education and Skills Survey 2.

³² The full list of countries includes: French (49% of companies rate it as useful to their organisation), German (45%), Spanish (34%), Polish (29%), Mandarin Chinese (28%), Arabic (16%), Cantonese (16%), Russian (13%), Portuguese (13%) and Japanese (8%).

³³ Tinsley, T. (2013), *Languages: the State of the Nation Demand and supply of language skills*. http://www.ucml.ac.uk/sites/default/files/pages/160/State_of_the_Nation_REPORT_WEB.pdf

³⁴ Tritscher-Archan (2008), *Fremdsprachen für die Wirtschaft*, Institut für Bildungsforschung der Wirtschaft

size with companies' probability of operating in international markets and being part of a larger multinational organisation. The ELAN study shows that large companies are more likely to recruit language-skilled workers than SMEs³⁵. 94% of large companies indicate that they seek to appoint workers who have the necessary linguistic and operational skills required to meet a specified business need. The equivalent figure for SMEs recruiting language-skilled workers is only 40%.

There is no comprehensive data on the demand for *foreign languages by business sector across Europe*. However, there are several studies that can contribute to the identification of key sectors.

The 2010 Eurobarometer on employers' perception of graduate employability found that there were large differences in the importance of foreign language skills by economic activity.³⁶ Graduate recruiters in the industry sector were most likely to highlight the importance of foreign language skills when recruiting higher education graduates. The proportion reporting that foreign language skills are 'rather important' or 'very important' were as follows:

- Industry – 78%
- Trade, accommodation and food services – 64%
- Non-public services – 63%
- Construction, transport, ICT – 62%
- Public services – 49%

As would be expected, a higher proportion of graduate recruiters with international contacts indicated that foreign language skills were very important when recruiting higher education graduates: 58% of recruiters with international contacts said that this was the case compared to 17% of employers with no international contacts.

In the UK, a study by UCML³⁷, which investigated demand through an analysis of job postings, a survey of recruitment agencies, and interviews with employers, found that most vacancies requiring language skills were in sales and trading, IT and technology, and administrative, finance, and project management roles. Tinsley (2013)³⁸ found a mixed picture depending on the data used, but the synthesis identified that the sectors where the need for languages is likely to be most critical are:

- Creative industries
- Education
- Finance
- IT
- Professional and business services / marketing and PR
- Hotels and catering
- Transport, storage and communications

Similarly, a German study reports the demand for foreign language skills to be highest in the manufacturing industry, tourism, accommodation and food services,

³⁵ DG EAC (2006), ELAN study: Effects on the European Union Economy of Shortages of Foreign Language Skills in Enterprise. http://ec.europa.eu/languages/policy/strategic-framework/documents/elan_en.pdf

³⁶ DG COMM (2010), Flash Barometer 304, Employers' perception of graduate employability, Analytical report. http://ec.europa.eu/public_opinion/flash/fl_304_en.pdf

³⁷ Mulkerne, S and Graham, A. (2011), *Labour Market Intelligence on Languages and Intercultural Skills in Higher Education*, Universities Council of Modern Languages

³⁸ Tinsley, T. (2013), *Languages: the State of the Nation - Demand and supply of language skills*.

transportation, wholesale and foreign trade, and financial services (Tritscher-Archan / IBW, 2008).³⁹

3.1.4 What foreign language skills are needed for what job roles?

In general, research indicates that better paid jobs have higher occupational language requirements.⁴⁰ There is also some evidence of this relationship in the case of foreign language requirements. The ELAN study found that language proficiency is most important for management positions, although technicians are also considered to need such skills as well. This is more so in some sectors than others (ICT sector (30%) and the agro-industries/ manufacturing sector (29%) compared to the retail and distribution/other services sector (16%). Foreign language skills were generally less important for shop floor workers.⁴¹

More recently, the Lemp study found that in France foreign language skills are more often demanded for management positions (57% and 59%) followed by technicians (48% and 41%) and other workers (8%). It also concludes that the language level demanded increases with the education level and the years of work experience required by the job.

Tinsley (2013) shows that for the UK, specialist linguist roles (e.g. translation, interpreting, and teaching) account for only 6% of jobs requiring languages. 'Accounts', 'marketing or PR' and 'sales' positions commonly require languages in vacancy notices.

In conclusion, while foreign language proficiency requirements generally increase with the job level, language skills seem to be needed at most levels in the workforce by some workers.

3.1.5 To what extent are foreign language skills a career driver and an essential job-related competence?

There are career benefits for individuals with language skills. According to the literature, they can contribute to employability, remuneration, and promotion.

For instance, a study by the Centre for Research on Education and Lifelong Learning (CRELL) found a relationship between foreign language skills and employability.⁴² Based on a secondary analysis of the data from the Adult Education Survey (AES 2011), from 24 Member States, it shows that adults who know one or more foreign languages are more likely to be employed than those who do not know any foreign language. This relationship holds true even for basic foreign language competences.

Ginsburgh, V. and Prieto-Rodriguez (2011) used the European Community Household Panel Survey for the period 1994–2001, to infer returns to non-native language abilities by native workers in nine countries of the EU. Results show a positive effect of foreign language proficiency used at the workplace on earnings, in all nine countries.⁴³

In the survey conducted in France as part of the 2015 Lemp study, half of the companies mentioned that foreign language competences had positive effects on

³⁹ Tritscher-Archan (2008), Fremdsprachen für die Wirtschaft, Institut für Bildungsforschung der Wirtschaft

⁴⁰ E.g. Chiswick, Barry R., and Miller, Paul W. (2010), Occupational language requirements and the value of English in the US labor market. *Journal of Population Economics*, 23, 353-372

⁴¹ DG EAC (2006), ELAN study: Effects on the European Union Economy of Shortages of Foreign Language Skills in Enterprise.

⁴² Araújo et al., 2015

⁴³ Ginsburgh, V. and Prieto-Rodriguez, J. (2011), Returns to Foreign Languages of Native Workers in the EU, *Industrial and Labor Relations Review*, Vol. 64, No. 3 (April 2011).

employees' career contributing to promotion, mobility and remuneration. The vacancy review showed that foreign language skills increase the chances of getting a stable and better remunerated job.

Grin, F., Sfreddo C. and Vaillancourt, F. (2009) analysed quantitative data from the Swiss Federal Statistical Office and a survey targeting companies from the industrial sector in French-speaking and German-speaking Switzerland. They found that the demand of multilingual workers is twice less sensitive to salary variations than that of unilingual workers, and concluded that this suggests that multilingual workers are more essential to companies.⁴⁴

A UK study⁴⁵ found that employers felt that languages provide graduates with a means of advancing their careers by contributing to business development and international relationship building. Another UK study⁴⁶ concluded that the level of employment of foreign language graduates is similar to that of other first-level graduates. It found that 89% of modern foreign language graduates are employed 3.5 years after graduation, while 8% are in further study, compared to an average for all graduates of 90% and 7%. The mean annual salary of language graduates at the time of the study was £26,823 – higher than for engineers, mathematicians, physicists, or chemists (with a combined average for all graduates of £22,912).

As indicated in 3.1.4 above, a high level of foreign language proficiency is an essential job-related competence for many jobs, especially for those involving client, customer or supplier contact. Moreover, employers seem to associate an experience of studying abroad not only with language skills but also with independence and openness to experience.⁴⁷ It seems reasonable to expect that these traits are valued and rewarded by employers as they are important for building long-term relationships with (foreign) clients, customers and suppliers.

3.1.6 Do proficient applicants have a competitive advantage?

Overall, the research evidence indicates that, all other things being equal, foreign language skills can make the difference in job access and career progression.⁴⁸ However, relative to the range of work-related skills and capabilities required, foreign language skills are of mixed importance for employers when they are recruiting university graduates. The Eurobarometer on employers' perception of graduate employability found that compared to all skills and capabilities (e.g. the ability to work in a team or computer literacy), graduate employers were least likely to highlight the importance of foreign language skills (33% rated these skills as 'very important' and 34% as 'rather important').⁴⁹ One-third also said that foreign language skills were 'rather unimportant' or 'not at all important'. Graduate recruiters in medium-sized companies were more likely to highlight the importance of foreign language skills than large companies.

Looking at employers' views about the importance of these skills for future graduates, foreign language capabilities were ranked as a relatively higher requirement: 31% of

⁴⁴ Grin, F., Sfreddo C. and Vaillancourt, F. (2009), *Languages étrangères dans l'activité professionnelle («LEAP»)*. Rapport au Fonds national de la recherche scientifique, PNR 56, <http://www.unige.ch/eti/recherches/groupe/elf/recherche-activite/LEAP/LEAP-RF-7logos.pdf>56.

⁴⁵ Mulkerne, S and Graham, A. (2011), *Labour Market Intelligence on Languages and Intercultural Skills in Higher Education*, Universities Council of Modern Languages

⁴⁶ HEFCE (2008), *Graduates and their Early Careers*, Issues Paper 2008/39, Bristol: HEFCE.

⁴⁷ Humburg, M. et al. (2013), *The Employability of Higher Education Graduates: The Employers' Perspective*. http://www.dges.mctes.pt/NR/rdonlyres/658FB04A-909D-4D52-A83D-21A2AC4F2D38/8096/employabilitystudy_final.pdf

⁴⁸ e.g. Humburg et al. (2013) and Chancelade et al. (2015).

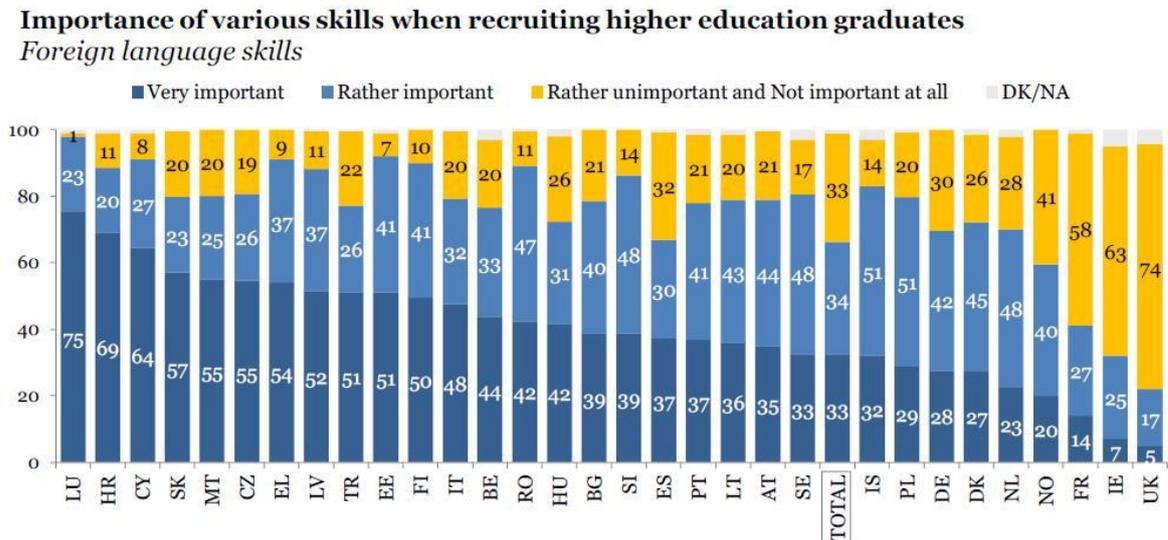
⁴⁹ DG COMM (2010), *Flash Barometer 304, Employers' perception of graduate employability*, Analytical report.

respondents said that foreign language skills will be among the most important skills and competences for higher education graduates in the next 5-10 years. However, other skills and capabilities (sector specific, basic skills, communication, team-working, and analytical and problem-solving) still ranked more highly.

While foreign language skills are not the highest ranked skills and capabilities for employers now and for the future, employers remain least satisfied with the foreign language skills of higher education graduates that their company has hired in the past three to five years, compared to other skills and capabilities. Only two-thirds of respondents were 'very satisfied' or 'rather satisfied', and 14% were not satisfied. By contrast, employers were most satisfied with computer skills, reading/writing skills, and team-working skills.

Individual country results for the importance of foreign language skills show a varied picture. Although in most countries, over half of respondents answered that foreign language skills were very or rather important when recruiting higher education graduates; the corresponding proportions were just 22% in the UK, 32% in Ireland and 41% in France. Graduate employers in Luxembourg, Croatia and Cyprus attached much higher value to foreign language skills (see Figure 2).

Figure 2: Variance in importance of foreign language skills by country (taken from Eurobarometer 304)



Q3.2. Please rate the following skills and competencies in terms of how important they are when recruiting higher education graduates in your company.
 Base: all companies, % by country

Another report on what makes graduates employable from an employers' perspective (with responses from more than 900 employers in nine different European countries) found that employers prefer graduates who have studied abroad, partly because this is an indicator of candidates' advanced international orientation and language skills.⁵⁰ International orientation, in particular, is a tipping factor rather than a make or break factor in the hiring process. However, as found in the Eurobarometer research, study experience abroad (as a proxy for language skills) is found to be less important than a field of study that matches the job tasks, work experience and grades. Content related skills (technical skills, etc.) are often more important. At the same time, for some jobs, foreign language skills are a prerequisite.

⁵⁰ Humburg et al. (2013)

The Languages for Jobs report points out that because proficiency in English is often considered a basic skill, knowledge of other foreign languages may provide the competitive edge.⁵¹

3.1.7 How do employers verify foreign language proficiency of job applicants?

In the first stage of the recruitment process, when screening CVs, companies tend to ask for a proof of language proficiency such as long stays abroad, standardised tests, exchange programmes, internships, professional experience, or post-graduate degrees. Foreign language proficiency is then also tested in the job interview or, if needed or available, assessment centres.⁵²

3.2 Key points emerging from the analysis of existing research

- While English is in demand as a foreign language for business, this is not the case for all international trade especially for cross neighbour border trade and trade with businesses in the large non-English speaking economies (both in and outside the EU) though the extent of this is not known across the EU;
- Different types of company/sectors appear to have different needs for foreign language skills though there are some roles/occupations within them that commonly do if businesses participate in cross-border trade. Little is known about trends;
- Since a low need for foreign languages appears to be associated with a focus of the business on the domestic market,⁵³ it seems reasonable to expect that demand may be greater from businesses in countries with smaller internal markets although supply chains and the increasing benefits of the free movement of goods and services within the EU appear to be extending demand for foreign language skills. While businesses using foreign language skills appear to benefit from this, those that do not may not be realising their potential;
- Despite this, foreign language skills are not as commonly seen as essential transversal skills for new entrants as other such skills. Foreign languages are however a prerequisite for some roles/occupations. Little is known about the level of competency required by businesses for roles/occupations;
- There are believed to be employability benefits for individuals from language skills - other than enabling mobility - where such skills are needed. Businesses value job seekers with foreign language skills as global markets mean that workforces need to be increasingly multilingual and the number of languages used are believed to have a positive influence on export success⁵⁴;
- Little is known about how commonly employers assess potential recruits' language skills and which are most used but a variety of approaches is used.

⁵¹ Thematic working group "Languages for Jobs" ET 2020 / DG EAC (2011), Languages for Jobs: providing multilingual communication skills for the labour market.

⁵² Didiot-Cook, H., Gauthier, V., and Scheirlinckx, K. (2000), Language needs in business, a survey of European multinational companies, CEMS Inter-faculty Group for Languages Joint Study Project
<http://www.hec.edu/var/fre/storage/original/application/7ca31409fee3f05c77b4a3d9286927d2.pdf>

⁵³ COTANCE (2011), Report on language needs in business, CELAN Network Project.

⁵⁴ According to the PIMLICO project, 'knowledge of a number of languages, rather than one or two, can make all the difference between an average performance and an exceptional one, and can provide that vital competitive edge' (p. 57).

3.3 Remaining gaps and implications for this study

Overall, the literature review revealed a lack of research available which provides an overview of the state of play of labour market demand for foreign language proficiency across the EU-28. Apart from being most up to date, this study seeks to fill this gap by

- Covering all 28 EU Member States;
- Examining the five economic sectors with the highest cross-border activity and the highest potential demand for foreign language proficiency;
- Collecting data from interviews, vacancy notices, and an employer survey, allowing for the triangulation of the findings from these different sources;
- Ensuring a sufficient number of observations to allow for the examination of sector and country differences in demand for foreign language skills.

The study examines the following issues:

- What business sectors/occupations need language skills, which languages and what levels/types of competence (and where in the EU is this the case for different languages and different sectors)?
- To what extent and in what circumstances are foreign language skills an essential job criterion for recruiters as opposed to being a desirable criterion, and how do they rank alongside other knowledge and skills? To what extent are languages considered a basic skill?
- What languages other than English are needed across Europe?
- Is the competitive advantage of foreign language skills higher in the domestic market or for business in or with other countries?
- To what extent do businesses meet their need for foreign languages through the recruitment of native speakers or improve the foreign language skills of their recruits to the competence levels they need?
- How do businesses assess foreign language competences of prospective employees?

4 BUSINESS NEEDS FOR FOREIGN LANGUAGE SKILLS AND HOW THEY ARE MET – EVIDENCE FROM INTERVIEWS FROM EMPLOYERS AND EMPLOYER BODIES

This section presents the findings from the interviews conducted with employers and employer organisations in order to provide insights into business needs for foreign language skills and how they are met. Before turning to these findings, there is merit in briefly summarising the existing evidence on the scale of foreign language need in enterprises. As this study is exclusively targeting employers expressing some kind of need for foreign language skills in, for example, job vacancies, it is not possible to derive any reliable statistic or judgement on the relative scale of need from the findings. However, the literature review, the interviews with employers and sector organisations and desk research identified several studies which shed some light on the extent to which enterprises and jobs require foreign language skills for effective functioning.

4.1 *The scale of need for foreign language skills in enterprises in Europe: evidence from existing international and national studies*

In a 2005 survey of the language needs of Austrian enterprises, 86% of 2017 enterprises stated that they had some kind of foreign language need. The 2011 CELAN report on language needs in business found that 46% of the 543 enterprises from 29 European countries which participated in the survey had a continuous need for foreign language skills, 16% a recurrent and 12% an occasional need. While these figures already suggest that foreign languages play an important role in enterprises' day to day functioning, studies focussing on occupations as the unit of analysis shed light on who and how many people are required to use foreign languages in enterprises.

The recent LEMP study in France (2015) found that 25% of a sample of 801 online job vacancies made reference to language requirements. Broken down by job level, many of the job vacancies for managers, professionals with supervisory functions and engineers (*cadres, ingénieurs*) required foreign language skills (39%), few of the vacancies for medium level professions (*professions intermédiaires*, 19%), very few of the vacancies for other, more junior level employees (*employees*, 8%), and almost none of the vacancies for skilled workers (*ouvriers qualifiés*, 2%).⁵⁵

Results from a recent set of surveys carried out by the National Institute for Education in the Czech Republic provide a similar picture.⁵⁶ The share of Czech employers that considered foreign language competencies as 'absolutely essential' when filling vacancies was:

- About 40% for university graduates (ISCED 2011 6-8);
- About 10% for high school graduates with direct access to tertiary education (ISCED 2011 344 & 354); and
- Less than 5% for high school graduates without direct access to tertiary education (ISCED 2011 353).

The findings of the LEMP study and the Czech surveys compare favourably with those of the Excelsior survey on expected hiring of more than 100,000 Italian enterprises conducted by the Italian Union of the Chambers of Commerce (Unioncamere) at the beginning of 2014.⁵⁷ The survey found that 22% of hires planned by enterprises in 2014 required candidates to have foreign language skills (86,000 out 385,000). Again,

⁵⁵ Chancelade et al. (2015)

⁵⁶ Doležalová & Vojtěch, 2013; Doležalová, 2014a; Doležalová, 2014b

⁵⁷ The Excelsior database is the "Information system for employment and training" managed by the National Association of Chambers of Commerce, the Ministry of Employment and the European Union <http://excelsior.unioncamere.net/>

foreign language demand was unequally distributed across educational/occupational levels. While enterprises stated that 57% of the positions to be filled with university graduates required foreign language skills, this was 26% for the positions requiring a secondary education diploma, and only 8% and 3% requiring a VET secondary education diploma or a lower secondary education diploma respectively.

In Germany, a 2012 representative survey⁵⁸ of 20,000 employed people conducted by the Federal Institute for Vocational Education and Training (BIBB) and the Federal Institute for Occupational Safety and Health (BAUA) found that 18% of them needed specialised/professional knowledge of a foreign language (Fachkenntnisse) to perform their job tasks, 40% needed at least basic knowledge of a foreign language (Grundkenntnisse) and 43% did not need any foreign language skills to perform their job tasks. This presented a clear increase in the demand for foreign language proficiency at work compared to 2006, when the previous survey found that 16% of employed people reported the need to have specialised/professional knowledge of a foreign language (2% less than 2012), 33% reported the need to have at least basic knowledge (7% less than 2012) and 51% did not use any foreign language at work (9% more than 2012).

As the BIBB/BAUA survey was designed to investigate foreign language demand in particular occupations, it provides detailed information on some of the sectors examined in this study. As shown in Table 6, the level of foreign language proficiency required differs by job level but also by economic activity (sector).

Table 6: Required foreign language levels by job level and sector in Germany

Job level/job role	Not required	Basic knowledge required	Specialised/professional knowledge required
<i>Non-tertiary vocational education degree</i>			
Manufacturing-related occupations	57.2%	35.5%	7.2%
Merchants in wholesale and retail trade	39.7%,	42.7%	17.5%
Skilled occupations in transportation	60.2%,	35.7%	4.1%.
Skilled occupations in accommodation and food services	29.7%	52.1%	18.3%
<i>Higher education degree</i>			
Chemists, physicists and natural scientists	3.1%	28.1%	68.8%
Engineers	13.8%	41.2%	45.0%
Managers, accountants, consultants	19.2%	36.9%	43.8%

Source: BIBB/BAUA survey. Hall, A. (2012).

⁵⁸ http://www.bibb.de/dokumente/pdf/a22_etb2012_Fremdsprachen.pdf Hall, A. (2012).

The findings of research in the UK differ substantially. A 2011 study⁵⁹ lead by the University Council of Modern Languages found that in the UK, only between 1 and 2.5% of job vacancies targeted at graduates explicitly required a foreign language. This was attributed to perceptions which it was suggested may exaggerate the role of English as a lingua franca in business.

Two general conclusions can be drawn from the existing evidence on foreign language needs in enterprises presented above:

- The scale of need for foreign language skills is substantial (except probably for English-speaking countries): studies consistently found that about one fifth to one quarter of jobs require an advanced level of foreign language skills (i.e. a level that goes beyond very basic knowledge and that therefore employers will include in the description of job vacancies);
- The scale of need increases with the job level (i.e. the level of education required to do the job): while many of the jobs performed by higher education graduates require foreign language proficiency, few of the medium-level professions have such requirements and relatively few of the positions for the low-skilled, with notable variations across sectors.

4.2 The purpose of language skills in enterprises

Employees' utilisation of language skills in enterprises predominantly depends on their job role and the extent to which their job tasks are related to the following six areas (not in order of importance):

- Sales, purchase and marketing;
- Execution and administration of imports and exports;
- Internal relations and communication in multinational companies;
- Customer service;
- Collaboration on transnational projects, and communication within international communities of highly specialised professionals;
- The use of tools and equipment.

Each of these is described below.

4.2.1 Sales, purchase and marketing

Sales purchase and marketing is an area for which interviewees in all five sectors consistently report a high need for foreign language skills.

Due to the openness of European economies and complex supply chains, purchasing and selling products and services to a large extent takes place across national borders and therefore involves numerous tasks that require foreign language competences. These tasks mainly concern managers and employees in sales, purchasing, and marketing departments. Foreign languages are used to negotiate the purchase and sale conditions with suppliers and customers in – and in fact between – enterprises of all sectors examined in this study. Foreign languages are also used to conduct business development activities. This applies to marketing administrators and managers in all five sectors from manufacturing, and wholesale trade and transportation to accommodation and food services (especially larger hotels) and professional, scientific and technical activities. Occupations related to external relations and communication frequently discussed during the interviews are: international sales manager, sales assistant, sales accountant, marketing officer,

⁵⁹ Mulkerne, S. and Graham, A.M. (2011), Labour Market Intelligence on Languages and Intercultural Skills in Higher Education, University Council of Modern Languages

marketing manager, marketing assistant, resort representative, supply manager, buyer, purchasing agent, etc.

Interviewees report the following main tasks related to sales, purchasing and marketing activities that require spoken and written language competences:

- Attending business meetings and trade fairs, and communicating with foreign buyers/sales agents;
- Developing and negotiating sales and purchasing contracts/agreements;
- Preparing information materials/product catalogues containing a description of the product to be sold/exported or imported;
- Following up customers in order to receive feedback on products and services delivered.

In addition to these tasks, employees working in sales are increasingly required to produce documentation to various authorities in order to ensure that the products comply with (European) regulations regarding traceability, safety, dangerous substances, environmental issues, labour market rights, etc.

4.2.2 Execution and administration of imports and exports

While the main task of staff in sales, purchasing and marketing departments is to develop business opportunities and to negotiate purchase and sale conditions, the execution of the import and export of products and services including their transportation is usually organised, administered and controlled by schedulers, expeditors, and export and import administrators and carried out by forwarders, truck drivers and other operational logistics staff. Here, too, foreign languages are required for a diversity of tasks. An expeditor in an international provider of logistic services and multimodal transport (air, sea and road), for example, will typically be responsible for scheduling purchases, purchasing, and scheduling the delivery of materials. This will often require dealing with many types of people located in different countries around the world. Similarly, operational functions like transport administrators will often involve dealing with clients, and truck drivers from various nationalities to communicate about agreed schedules, loading/unloading addresses as well as the type, weight, and amount of freight. Import and export administrators will also be in charge of completing custom documents and communicating with custom authorities as well as banks. For a small number of functions such as stock managers and warehouse workers foreign language proficiency is less important.

4.2.3 Internal relations and communication

The need for foreign language skills for internal relations and communication strongly depends on the structure and ownership of the enterprise. In a national branch of a multinational company, some positions may be filled with (seconded) staff not able to speak the local language so that (part of) internal communication needs to take place in a foreign language. This does not only concern managerial positions and communication from one level of the business to another, but also other positions and communication among colleagues at the same level. A Slovenian employer, for example, stated that in his company foreign languages are used for *"internal communication with personnel who are not fluent in Slovenian – workers from former Yugoslav countries – and the General Manager who is German and does not speak Slovenian."*⁶⁰

With increasing foreign language proficiency of employees, international companies may even decide to distribute general internal communications, such as newsletters or messages from the international management, in a foreign language.

⁶⁰ 13, Accommodation and food service activities, Slovenia

"The change has taken place during about the last 10 years in this company. English is nowadays a natural part of the organisational culture. Two years ago we realized that there is no need to translate the company's quarterly review into Finnish anymore." (15, Manufacturing, Finland)

There is a continuum in the extent to which foreign languages are used for internal relations and communication in international companies. While some international companies resemble a network of independent companies or production sites operating in their local languages, in many cases the structure of international companies is highly integrated. In many of the companies interviewed there exists an official "company language" which is often a foreign language to employees. Having a "company language" does not necessarily imply that all internal communication must take place in the company language regardless of work tasks or the language composition of teams, etc. The company language rule may be restricted, for example, to departments operating company wide while local administrators, bookkeepers and shop floor workers communicate in the local language, for example:

*"This position [consultant storage systems] is located in a group department concerned with company wide strategic planning. This person may need to communicate with engineers in our production site in France, for example. Our local administration and the bookkeeping, however, operate in German."*⁶¹

4.2.4 Customer service

Among the five sectors examined in this study, the need for foreign language skills for customer services is most apparent in the accommodation and food services sector where this is core business. In particular in areas with many tourists or business travellers hotel receptionists and restaurant staff are in constant contact with guests with diverse national backgrounds. Housekeeping staff would be unlikely to require anything but very minimal skills in foreign languages since their contact with international guests is limited. The same applies to chefs and chef trainees. Customer requirements are undoubtedly a key issue which dictates the extent to which employees require foreign languages. One interviewee from Hungary stated that:

*"The need for language skills varies by job. Those colleagues who directly meet guests need foreign language skills the most."*⁶², with another in a different sector stating that *"It is not necessary to know foreign languages as 99% of customers are Hungarian"*⁶³

There are also interesting differences within sectors. For example, customer service roles (regardless of sector) often require foreign language skills but these often make up a small share of the overall workforce. This can include a range of roles, for example:

- Customer service hotlines. Call centre agents need foreign language skills for handling requests and questions, and solving problems of customers operating in a foreign language;
- Installation and maintenance of products abroad, such as machinery and equipment, where employees such as fitters and mechanics need to be specialised in customer service and being able to communicate in a foreign language.

"More than 50% of our production ends on foreign markets, frequently even with montage being done in the destination country. This makes it essential for us that not

⁶¹ 8, Manufacturing, Austria

⁶² 13, Accommodation and Food Services, Hungary

⁶³ 2, Wholesale and Retail Trade, Repair of Motor Vehicles and Motorcycles, Hungary

*only our sales representatives, but also our constructors and technologic specialists know English*⁶⁴

Examples of tasks related to customer service activities requiring foreign language skills are:

- Greeting guests and customers;
- Answering general questions, explaining the menu, describing the way to the conference room;
- Taking on, confirming, altering, cancelling reservations;
- Solving product or service related problems;
- Following up on customer satisfaction;
- Communication required when installing and maintaining products.

4.2.5 Collaboration on transnational projects and communication within international communities of highly specialised professionals

For some job roles within enterprises, language proficiency requirements are unrelated to the ownership or structure of the company or the linguistic diversity of customers but are related to enterprises' participation in transnational projects with partner businesses and the use of a *lingua franca* in international communities of highly specialised professionals. In some areas of activity, for example in research and development (R&D), all relevant documents and outputs will be published in English and all professional activities, such as the attendance at scientific conferences will require foreign language proficiency.

*"English is a conference language [that] is essential for every employee in the science sector."*⁶⁵

In some professional areas (e.g. electrical engineering) almost every business activity is carried out using just English or English in combination with a local language. This was often reported by interviewees in the Professional, scientific and technical activities and the Manufacturing sectors.

*"Engineering companies as well as ICT companies employ people from all over the world, they only communicate in English."*⁶⁶

4.2.6 The use of tools and equipment

Several Interviewees mentioned that in some cases employees working in a predominantly national environment/market need some foreign language skills. While shop floor workers, such as knitting machine operators in manufacturing, are generally not required to be competent in foreign languages, they may from time to time be required to understand the English menu of equipment or to read manuals if these are not available in their language.

A higher level of foreign language can be required in this context. For example, external communication may be undertaken in some roles with a medium level of language skills (with exception of management positions), but technical professions may have to read handbooks and manuals of equipment written in complicated professional language where engineers provide technical designs, which require employees to understand foreign language at higher levels.

⁶⁴ Quotes taken from the following article: Proc to musime myslet vazne s vyukou odborného cizího jazyka, Special pro Střední Skoly, 01/2015, see link <http://magistr.rizeniskoly.cz/cz/casopis/rizeni-skoly/proc-to-musime-myslet-vazne-s-vyukou-odborneho-ciziho-jazyka.m-1806.html>

⁶⁵ 5, Professional, scientific and technical activities, Poland

⁶⁶ 17, Professional, scientific and technical activities, Sweden

4.2.7 Summary

The need for foreign language proficiency depends on the job tasks and the extent to which they are related to the following six purposes of foreign language skills in businesses: sales purchase and marketing; the execution and administration of imports and exports; internal relations and communication; collaboration on transnational projects and communication within international communities of highly specialised professionals; and the use of tools and equipment. These purposes of foreign language skills and the job roles associated with them can be found in all sectors examined in this study. The use of a foreign language for internal communication depends on the business being or belonging to a multinational company. For the other purposes distinguished in this study, the proportion of the workforce with associated job roles varies across sectors:

- Foreign language use in sales, purchase and marketing appears to be particularly important in the Manufacturing and the Wholesale and retail trade sectors;
- The execution and administration of imports and exports is an important driver of foreign language skill demands in the Wholesale and retail trade sector, the Transportation and storage sector and in logistics departments of Manufacturing sector companies.
- Customer service is the core business of companies in the Accommodation and food service activities sector, although job roles similar to that of, for example, receptionists can be found in all sectors;
- Collaboration on transnational projects and the use of foreign languages within international communities of highly specialised professionals is a main purpose of foreign language use in the Professional, scientific and technical activities sector and very important for communication among, for example, engineers in the Manufacturing sector;
- Foreign language requirements in relation to the use of tools and equipment have been most often mentioned in the Manufacturing and the Professional, scientific and technical activities sectors.

There are indications that job roles and tasks are more differentiated in larger enterprises. Large enterprises are also more likely to be foreign owned which is often associated with internal communication being done in a foreign language

4.3 Which are the most useful languages and why?

The needs for different foreign languages do not vary greatly between sectors. There are differences between countries mainly related to languages other than English which are related to trade links, visitors and relative locations.

4.3.1 Most useful languages

Overall, the five most important foreign languages according to the unweighted data, giving equal weight to all employers, were English, German, Russian, French and Dutch. When weighting responses according to the scale of the sectors' employment in countries, this ranking changes, in particular with regard to the importance of Russian and Dutch, as shown in Table 7. This is due to the relatively small size of the employment sectors in the Baltic countries (for Russian) and Belgium (for Dutch).

Table 7: Importance of foreign languages, unweighted and weighted interview data

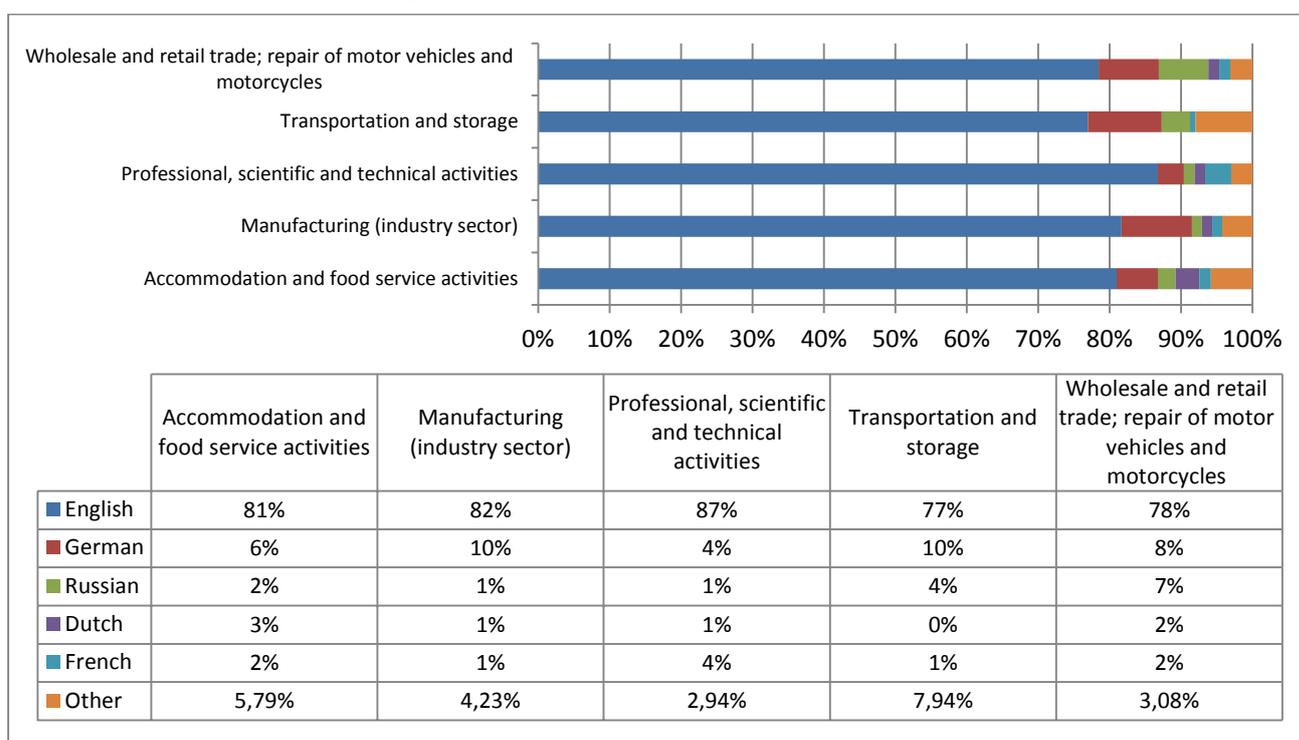
Most useful foreign language	Share (in %) unweighted data	Ranking unweighted data	Share (in %) weighted data	Ranking weighted data
English	81	1	80	1
German	8	2	6	2

Russian	3	3	1	8
French	2	4	3	3
Dutch	2	5	1	10
Spanish	1	6	2	5
Polish	1	7	2	4
Other	2		5	

Note: Weights are based on Eurostat table [lfsq_epgan2] and weight observations according to the employment size of the sector in a country in relation to EU total employment in that sector.

English was the most useful language across each of the sectors included in this study, with only small variation between sectors. As shown in Figure 3, almost all employers in the Professional, scientific and technical activities sector stated that English was the most useful foreign language whereas the share of employers in the Transportation and storage sector and the Wholesale and retail trade; repair of motor vehicles and motorcycles sectors stating English was the most useful foreign language was slightly lower than other sectors, although greater than three quarters.

Figure 3: Most useful foreign language by sector

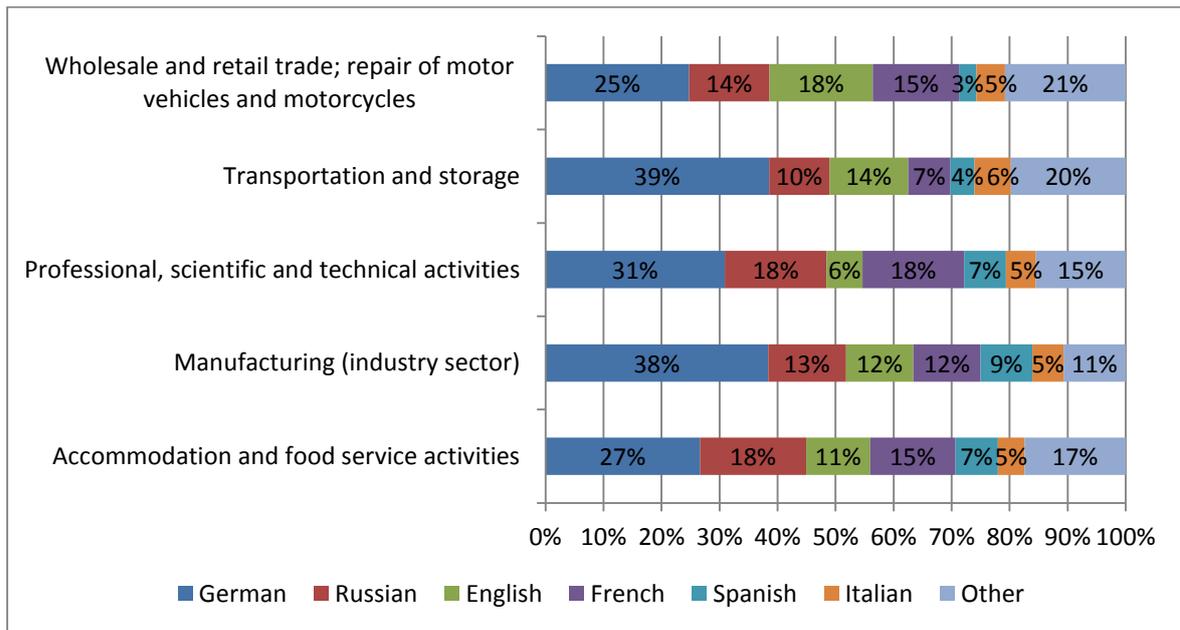


Source: Interviews with employers, ICF International, 2015. Response to the question: For this kind of position, what is the most useful language?

The interviews with employers also show that, after English, German was the next most useful language in four out of five of the sectors included in this study (in the Professional, scientific and technical activities sector French was the next most useful language, alongside German).

Employers were also asked to rate the second most useful language. Figure 4 shows that in each of the five sectors included in the study German was rated as the second most useful language for employees to hold. However, there was some variance in the strength of this finding between sectors. For example, in the Wholesale and retail trade sector a quarter of employers stated that German was the second most useful language, compared to around two-fifths of employers in the Transportation and storage sector. After German the next most useful second language in all sectors was Russian.

Figure 4: Second most useful language, by sector



Source: Interviews with employers, ICF International, 2015. Response to the question: [For this kind of position, what is the most useful language?] And the second most useful language?

Figure 4 also clearly shows a wide spread of foreign languages as the second most needed foreign language with no single language having a clear majority. Languages other than the most widely spoken European languages appear to be of greater importance in the Transportation and storage and Wholesale and retail trade sectors, with the highest share of “other” languages mentioned by employers.

Overall, the most important second most useful foreign languages are German, Russian, French, English, and Spanish. These five languages do also constitute the top 5 when weighting the data, although the ranking changes to German, French, English, Spanish, and Russian.

4.3.2 Determinants of foreign languages required in businesses

According to the interviews, the need for specific foreign languages does not relate to the sector nor to job levels (i.e. work experience and required educational attainment) and the size of the business. In all sectors, the usefulness of languages other than English appears to mainly reflect the whereabouts of businesses’ customers and trade partners and the use of the foreign language as an intermediary language.

“We cannot make business without knowing the language of our partners and clients.”⁶⁷

“We live next door to German-speaking areas. Many guests come from these areas.”⁶⁸

“Areas around Dubrovnik are a very attractive destination for French tourists, while beaches nearby Zadar and Spilt are more popular among the German visitors. Thus, a single rule does not exist on the second most wanted foreign language”

“When it comes to the Italian market, most Maltese businessmen do speak some Italian”⁶⁹

“Russian [...] because there are a few countries where communication happens mostly in Russian: Latvia, Russia, Ukraine, Belarus”⁷⁰

⁶⁷ 2, Transportation and storage, Estonia

⁶⁸ 14, Accommodation and food service activities, Hungary

⁶⁹ Sector body, Manufacturing, Malta

*"German, because Hungary's largest economic partner is Germany. Most orders come from Germany."*⁷¹

Interviews also indicate the usefulness of a particular language may be determined by a country's strong position in the market or sector. This, for example, seems the case for German in relation to manufacturing, with much of the associated trade literature in German.

*"German is becoming strongly desired, because the German market in our sector is so great and consequently business partners and good practices are more developed in the German-speaking area than within the Anglo-Saxon language group."*⁷²

In addition to the language spoken by suppliers and customers being an important driver, it is also the case that some companies have language requirements because they want to uphold company traditions. For example, in international companies, the language of the company's origin or headquarter is often required or at least desired.⁷³

4.3.3 Summary

English is by far the most important language in international trade and the provision of services with over four in five employers stating that this was the most useful language in their business in all sectors. This is followed by German and Russian.

The most cited second most useful language is German, followed by Russian, English and French, with no single language having a clear majority. Languages other than the languages spoken by large numbers of people like German, Russian, French, Spanish, and Italian, such as Danish, Swedish and Turkish seem to be most important in the Transportation and storage sector.

Drivers of required languages appear to be the language of customers, clients and partners as well as the dominance of a country and its market in a particular area of business (e.g. Germany and German for machinery).

4.4 What is the level of foreign language proficiency usually required/desired and why?

This section considers the required or desired level of language skills for employers. Analysis is undertaken by sector, level of work experience, educational requirement and business size.

4.4.1 The level required by businesses of the most useful foreign language

For the most useful foreign language, employers interviewed most often ask applicants to have high (C1-C2) and medium level (B1-B2) proficiency. In general, the level of skills demanded is higher for oral than for written skills.

⁷⁰ 8, Manufacturing, Lithuania

⁷¹ 10, Transportation and Storage, Hungary

⁷² 20, Professional, scientific and technical activities, Slovenia

⁷³ 1, Transportation and storage, Germany

Box 1: The definition of foreign language levels used in this study

The definition of foreign language levels used in this study is aligned with levels A2, B2 and C1 of the Common European Reference Framework (CEFR). CEFR formulations of oral and written language levels were simplified to increase their suitability for telephone interviews. The following text was read to the interviewees for rating the level of foreign language proficiency required or desired for the position discussed during the interviews:

I will now read to you the definition of low, medium and high ORAL foreign language proficiency we are using for this study:

Someone with low ORAL foreign language proficiency: – Can communicate in routine tasks requiring a simple and direct exchange of information on familiar topics.

Someone with medium ORAL foreign language proficiency: – Can interact with native speakers and can even take part in discussions in familiar contexts.

Someone with high ORAL foreign language proficiency: – Can use language flexibly and effectively for professional purposes.

I will now read to you the definition of low, medium and high WRITTEN foreign language proficiency we are using for this study:

Someone with low WRITTEN foreign language proficiency: – Can write short, simple notes and messages.

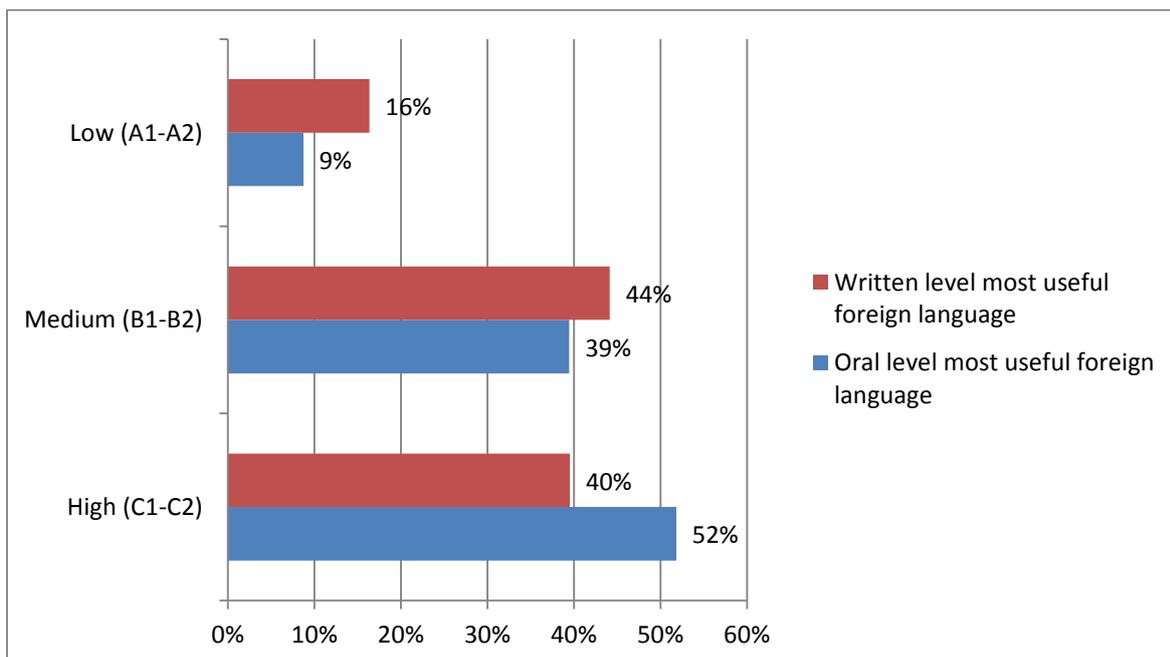
Someone with medium WRITTEN foreign language proficiency: – Can write clear, sometimes detailed text on a wide range of topics related to expertise or interest.

Someone with high WRITTEN foreign language proficiency: – Can write well-structured essays or reports, expressing points of views and underlining salient issues

As shown in Figure 5:

- For oral language skills, most of the jobs requiring foreign language skills demand high level skills; with far fewer jobs demanding low level language skills;
- For written skills, while over a third of employers identified high level skills, a higher share of employers identified medium level skills.

Figure 5: Demand level of oral and written skills for the most useful foreign language



Source: Interviews with employers, ICF International, 2015. Response to the questions: For a [job title], what

is the required/desired level of ORAL proficiency in [language 1]? For a [job title], what is the required/desired level of WRITTEN proficiency in [language 1]?

Figure 6 and Figure 7 indicate that there are differences in the levels and types of competences needed by different sectors:

- Professional, scientific and technical activities sector employers demanding higher skills in foreign languages than other sectors both written and oral. Most of the interviewees from this sector mentioned the need for high oral skill in combination with high written skills. These are often required from skilled professionals, such as engineers or consultants and researchers that need not only to communicate orally in an effective manner, for instance with clients, but also have the ability to draft complex reports:

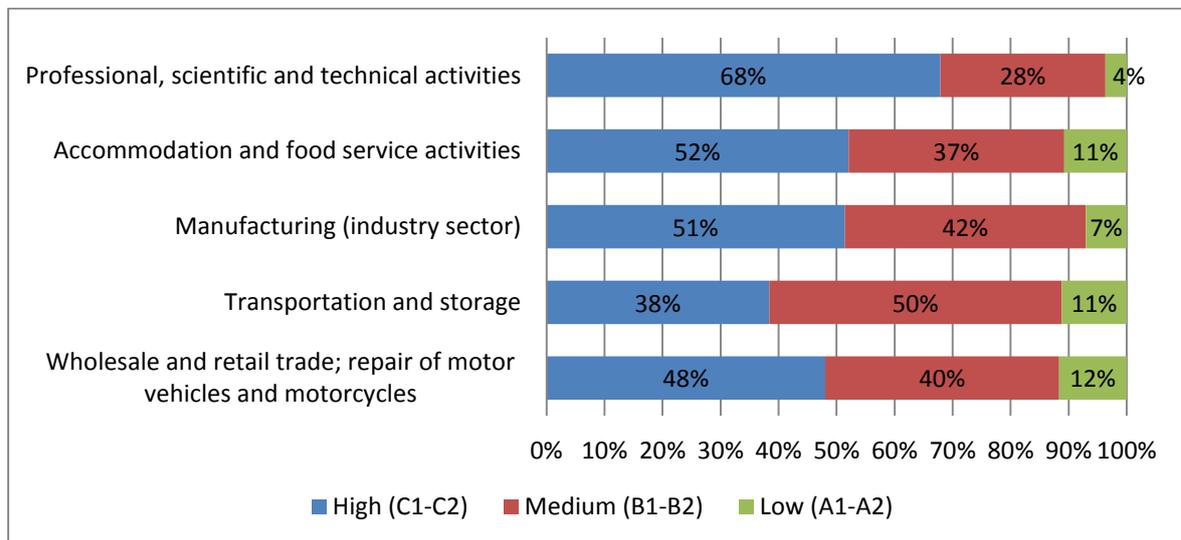
"If someone does not have the required oral level, I cannot let that person anywhere near clients. They do not have to be a virtuoso, but they need to understand nuances and complex issues. As for written skills, the output material in terms of articles and reports needs to be perfect".⁷⁴

- In the Accommodation and food services sector, over half of the employers require the highest level of oral skills compared to only slightly more than a quarter requiring the highest level of written skills. There is a similar but less pronounced difference in the Transportation and storage and Wholesale and retail sectors:

"Most of the communication with foreign clients is done through the telephone or in person, thus in our company it is more important to have strong oral communication."⁷⁵

- In the Manufacturing sector there is no significant difference between the level of oral and written skill requirement with around a half requiring the highest level of oral and written skills.

Figure 6: Demanded level of oral skills for the most useful foreign language, by sector

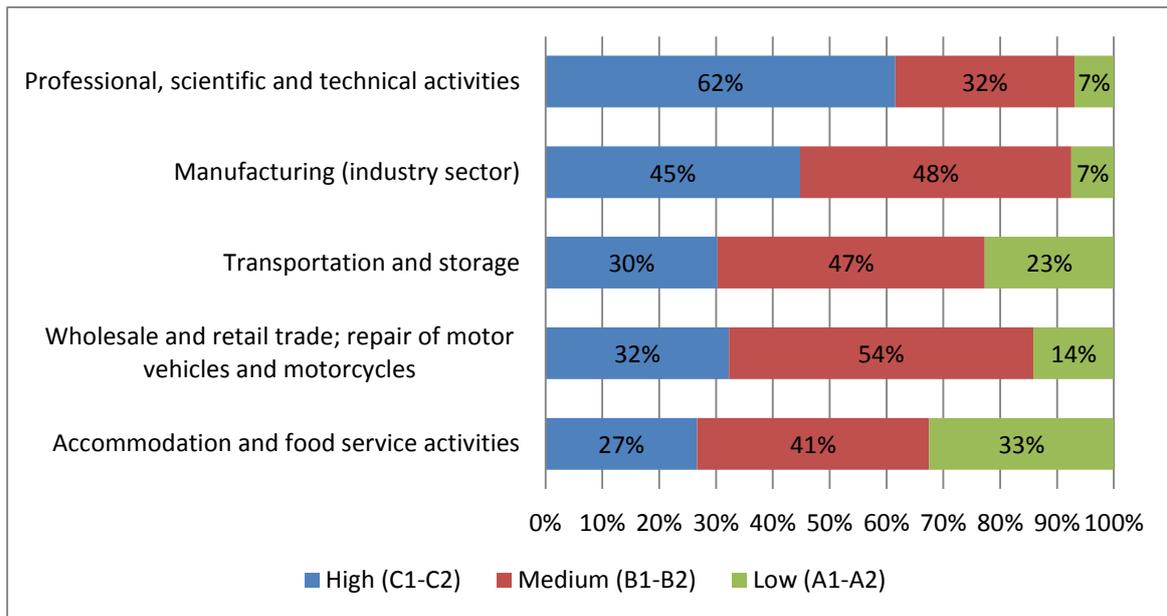


Source: Interviews with employers, ICF International, 2015. Response to the question: For a [job title], what is the required/desired level of ORAL proficiency in [language 1]?

⁷⁴ 3, Professional, scientific and technical activities, Luxembourg

⁷⁵ 8, Accommodation and food service activities, Croatia

Figure 7: Demanded level of written skills for most useful foreign language, by sector



Source: Interviews with employers, ICF International, 2015. Response to the question: For a [job title], what is the required/desired level of WRITTEN proficiency in [language 1]?

The level of language skills needed, as well as the relative need for higher oral and/or written skills, relates to sub-sectors and to **job roles**.

For example, some sub-sectors appear to require a particularly high foreign language level. In the Transportation and storage sector, Water transport employers have needs for high level skills. The Royal Belgian Ship owners' Association stated that *"as English is the one and only language used on board ships to communicate internally and externally within the maritime industry, proficiency in English is not an advantage but a prerequisite for employment"*.

Within sectors specific job roles emerge as needing higher level oral and written skills and different levels of these skills. It is evident that:

- In the Accommodation and food service sector a significant number of jobs require oral communication with clients (e.g. hotel receptionists and waiters). Interviewees from the hotel sub-sector commonly observed that competency at level C1/C2 in English is often expected from managers and sometimes from receptionists, who frequently communicate with customers about a broad range of topics in both oral, and, less frequently, in written form. A lower level (B1/B2) is expected for employees providing bar service, while even a modest level of basic English is considered to be an asset for those in the cleaning service.⁷⁶ It was also noted in Poland that within the accommodation and food services industry "When it comes to writing, the level is usually marked as low, with one exception, concierge"⁷⁷
- Higher foreign language skills are typically required for client-related functions in the Manufacturing sector. A Lithuanian employer explained that *"a sales manager who constantly communicates with clients has to have good language*

⁷⁶ 21, Accommodation and food service activities, Czech Republic

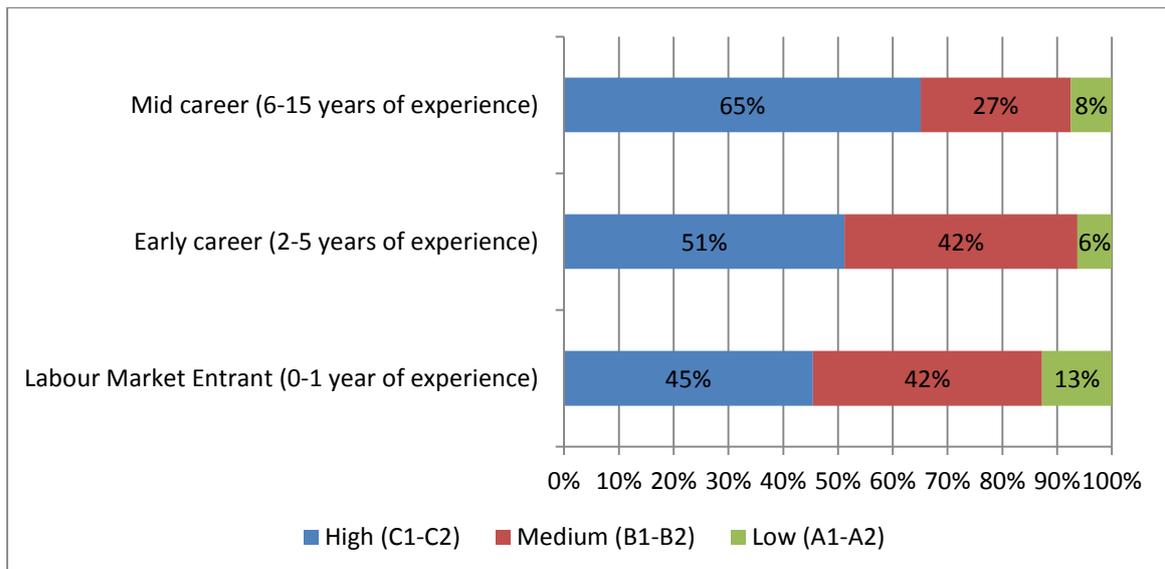
⁷⁷ Accommodation and food service activities, Employer/sector organisation 1 and 2. Poland

skills to secure the deal. On the other hand, a logistics manager only needs basic foreign language competence".⁷⁸

- For many in the Manufacturing and Transportation sectors, communication with clients often requires stronger oral than written skills. An employer from Italy commented that their transportation company is "based on oral communication, therefore writing skills are not that relevant and rarely assessed beforehand". A Luxembourgish employer stated that "one needs written skills to write emails, which are more than short and simple standardised emails. They contain technical details. But it is not a tragedy if the sentence turns out to be a bit crooked."⁷⁹ So technical language is needed but to a higher level in speaking and listening. "A freight forwarder must be able to communicate about specific technical issues concerning documentation of trade regulations, customs and logistics."⁸⁰

There seems to be a relationship between the job level (indicated by required work experience and educational attainment) and the level of language skills required. Figure 8 and Figure 9 below suggest that positions requiring more work experience more often demand higher language skills. Jobs for workers at mid-career (6-15 years of experience) more often require higher language skills than jobs for those at the beginning of their career (2-5 years of experience), and these in turn more often require higher language skills than positions for labour market entrants.⁸¹ There is also a smaller difference in the requirement for higher level written and oral skills for mid-career jobs.

Figure 8: Demanded level of oral skills for most useful foreign language, by work experience



Source: Interviews with employers, ICF International, 2015. Response to the question: For a [job title], what is the required/desired level of ORAL proficiency in [language 1]? and How many years of work experience are usually required for this kind of position? Note: As cell size for later labour market careers (15<) is very low (18), this category is not reported here.

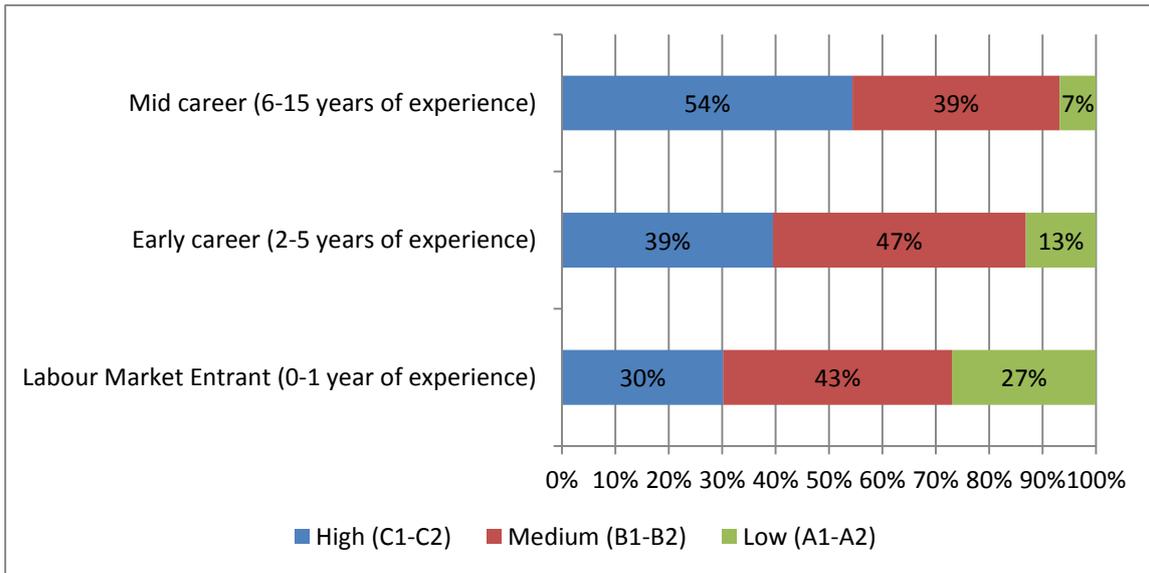
⁷⁸ 2, Manufacturing, Lithuania

⁷⁹ 11, Manufacturing, Luxembourg

⁸⁰ 10, Transportation and storage, Denmark

⁸¹ There are only 18 observations for later career professionals (>15 years of experience). They are therefore omitted from the analysis.

Figure 9: Demanded level of written skills for most useful foreign language, by work experience

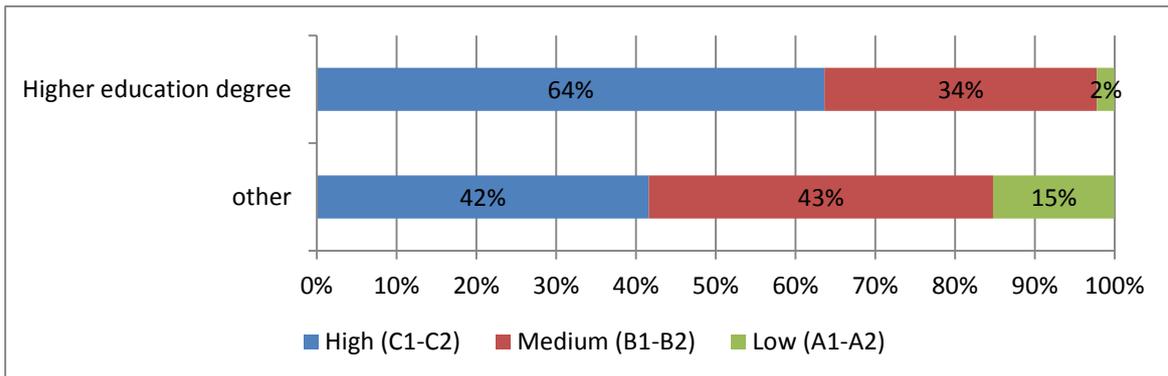


Source: Interviews with employers, ICF International, 2015. Response to the question: For a [job title], what is the required/desired level of WRITTEN proficiency in [language 1]? and How many years of work experience are usually required for this kind of position? Note: As cell size for later labour market careers (15<) is very low (18), this category is not reported here.

This apparent link between work experience and language level suggests that positions involving a higher degree of responsibilities would require both stronger work experience in similar functions, and better language competences.

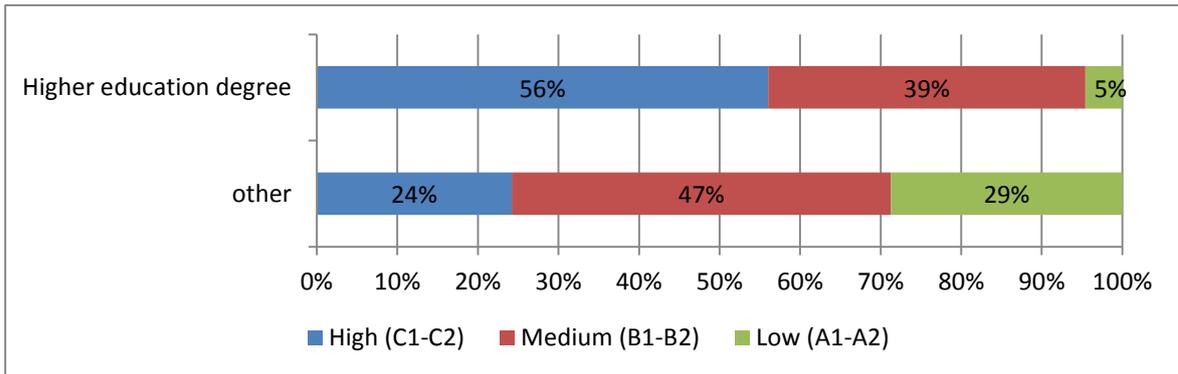
Figure 10 and Figure 11 show that employers more often require a high language level (C1-C2) when recruiting staff with a higher education degree than for staff with a lower qualification level although over four in ten require the highest level of oral skills for non-degree level jobs.

Figure 10: Demanded level of oral skills for most useful foreign language, by education level



Source: Interviews with employers, ICF International, 2015. Response to the question: For a [job title], what is the required/desired level of ORAL proficiency in [language 1]? and Is a higher education degree necessary to do the job?

Figure 11: Demanded level of written skills for most useful foreign language, by education level



Source: Interviews with employers, ICF International, 2015. Response to the questions: For a [job title], what is the required/desired level of WRITTEN proficiency in [language 1]? and Is a higher education degree necessary to do the job?

Candidates with a higher education degree are expected to have better language skills than those with lower qualifications. “Employees in the sector [of Professional, scientific and technical activities] have long educational backgrounds, i.e. university-level, and they are used to reading and writing reports in English”.⁸²

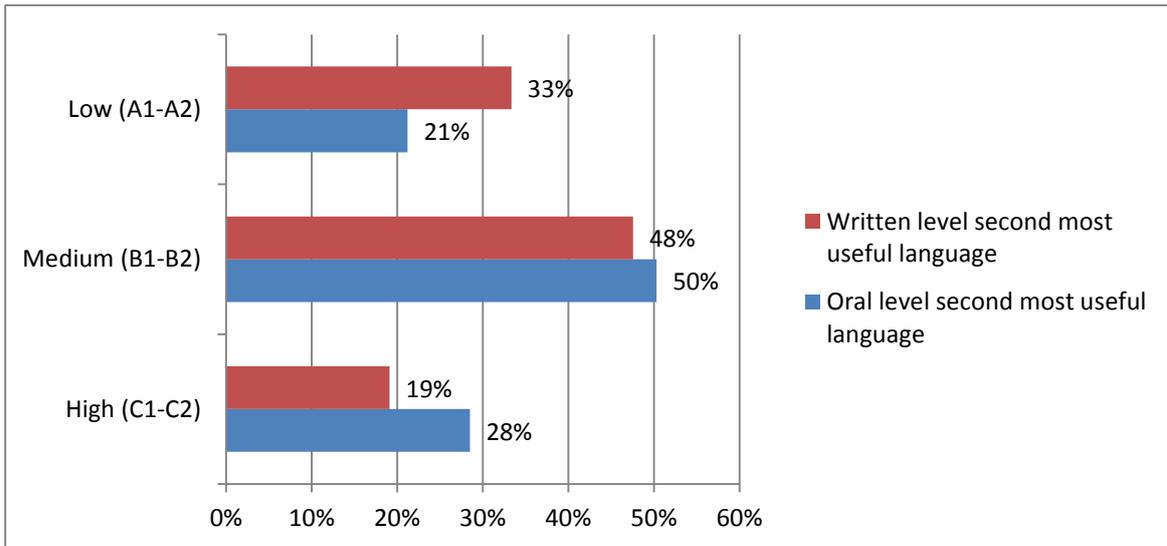
The data suggests that medium-sized businesses demand high levels of oral and written skills for the most useful language more often than small and large sized businesses (57% vs. 46% and 53% for oral, and 23% vs. 19% and 15% for written).

4.4.2 The level required by businesses of the second most useful foreign language

The level of competence required for the second most useful foreign language is generally lower than for the most useful foreign language. As shown in Figure 12, employers interviewed stated that they most often asked for medium level skills (B1-B2), both in oral and written language. As in the case of the most useful foreign language, the level of skill demanded is higher for oral skills: while around a fifth only asked for a low level of oral skills for the second most useful foreign language, this was around a third for written skills.

⁸² 11, Professional, scientific and technical activities, Sweden

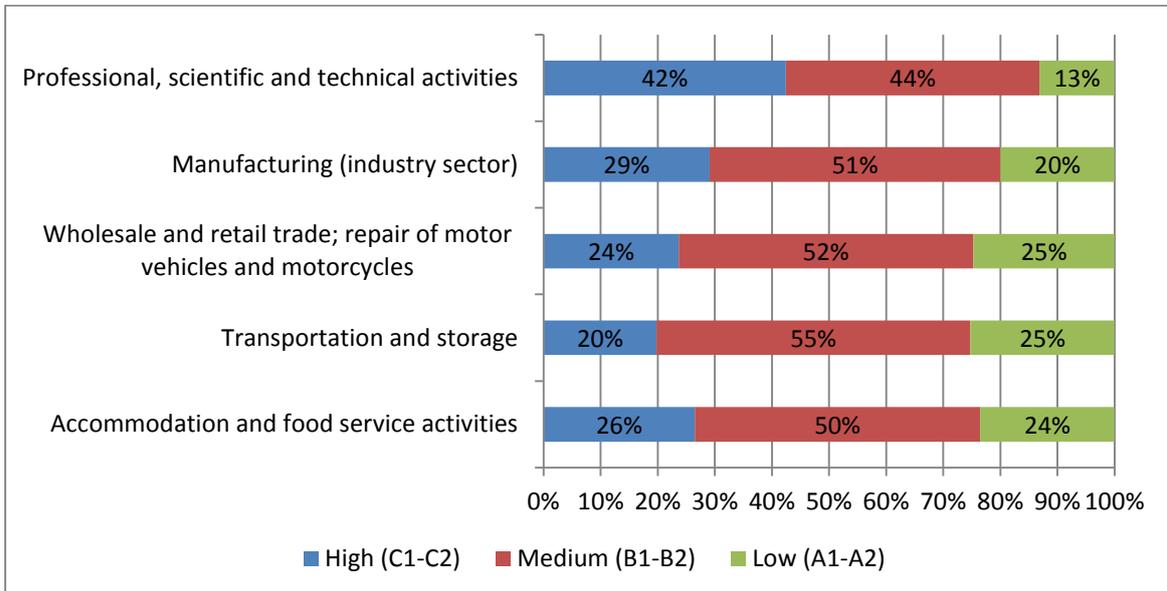
Figure 12: Demanded level of oral and written skills for the second most useful foreign language



Source: Interviews with employers, ICF International, 2015. Response to the question: For a [job title], what is the required/desired level of ORAL/WRITTEN proficiency in [language 2]?

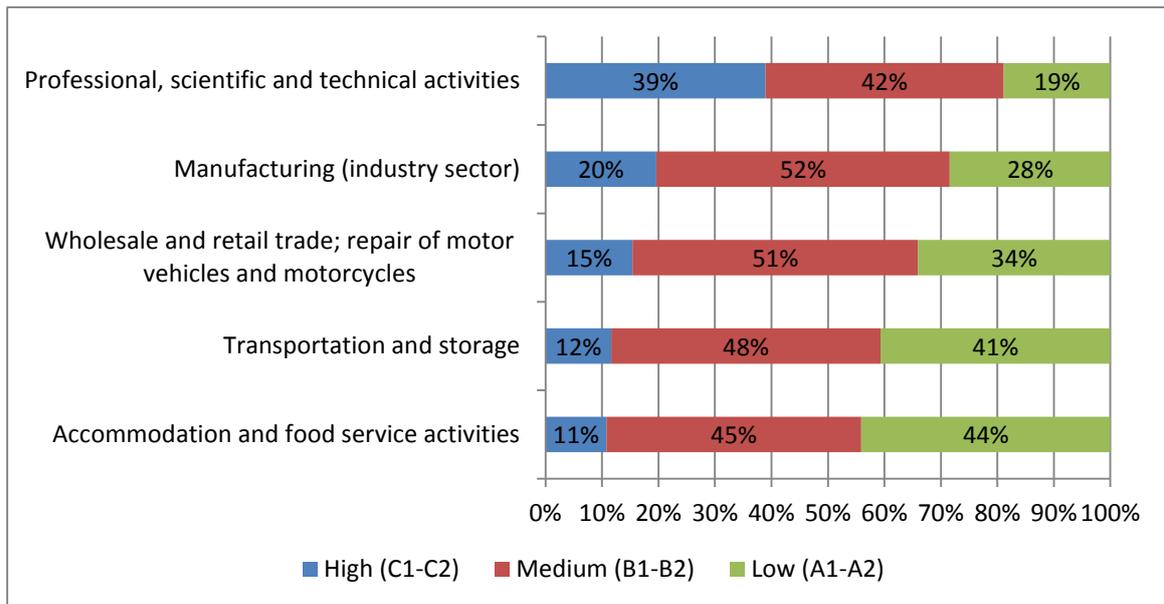
Employers in the Professional, scientific and technical activities sector again demand higher skills levels than other sectors though these are considerably lower than for the most useful foreign language. Employers in all sectors have a higher demand for oral skills compared to written skills. The difference between oral and written language skills is most significant among employers in the Accommodation and food service sector (see Figure 13 and Figure 14).

Figure 13: Demanded level of oral skills for second most useful foreign language, by sector



Source: Interviews with employers, ICF International, 2015. Response to the question: For a [job title], what is the required/desired level of ORAL proficiency in [language 2]?

Figure 14: Demanded level of written skills for second most useful foreign language, by sector



Source: Interviews with employers, ICF International, 2015. Response to the question: For a [job title], what is the required/desired level of WRITTEN proficiency in [language 2]?

As in the case of the first language, the language level demanded depends more on the required job duties than on the sector. Again, higher skills in several foreign languages are typically required for client-related functions. A Maltese employer from the Accommodation and food service sector, stated that “front of house need to have excellent speaking and writing skills in English - more so for speaking. We also have Italian and French guests, so we would ideally want to see a good level of proficiency for speaking these languages”.⁸³

However, even low language skills in a second language can be valued by employers. For example a Finnish employer in the Wholesale and retail trade sector stated “If you understood even a little Chinese [in addition to English and technical and sales competences], it would be very flattering for the business partners and this would be an advantage in the negotiations”.⁸⁴ A Lithuanian employer believed that language skills, beyond English, increase the chance of gaining desired results: “For example, if you write to a Norwegian in English it may be a week before he replies. But, if you write to him in Norwegian and then talk to him, you will get a response the following day”.⁸⁵

The potential of foreign language proficiency to generate a competitive advantage for enterprises is discussed in more detail in Section 4.10.

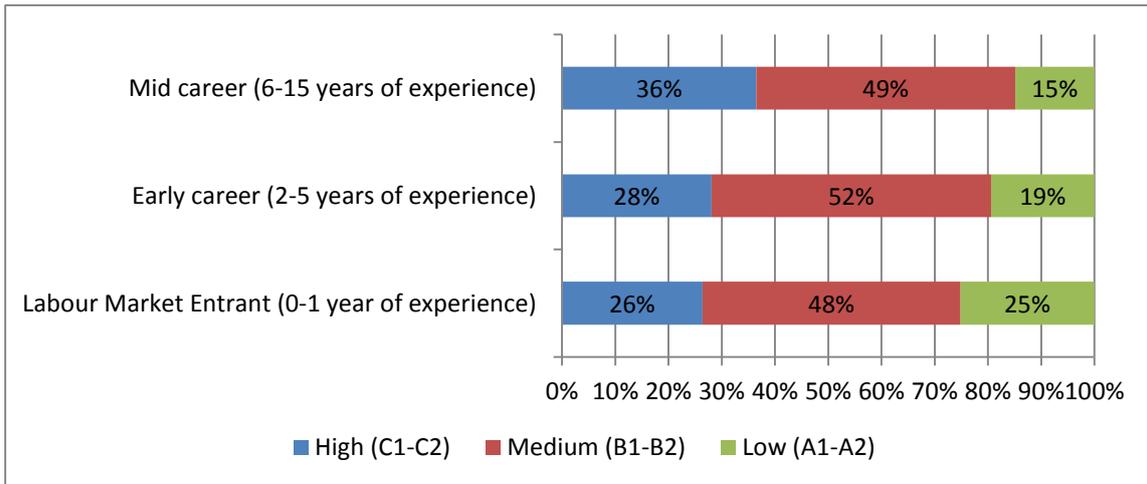
The positive relationship between job level and required language proficiency found for the most useful foreign language is less clear in the case of the second most useful foreign language. However, for the second most useful foreign language jobs for workers at mid-career (6-15 years of experience) more often require higher language skills than jobs for those at the beginning of their career or labour market entrants, as can be seen in Figure 15 and Figure 16. Higher proficiency in the second most useful foreign language is again more often asked from candidates with a higher education degree compared to those with lower qualification levels (Figure 17 and Figure 18).

⁸³ 7, Accommodation and food service activities, Malta

⁸⁴ 12, Wholesale and retail trade, Finland

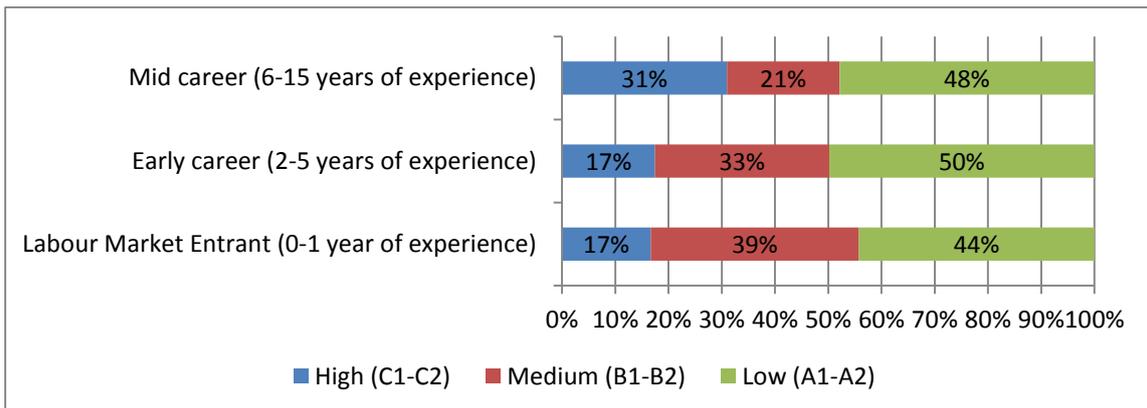
⁸⁵ 31, Manufacturing, Lithuania

Figure 15: Demanded level of oral skills for second most useful foreign language, by work experience



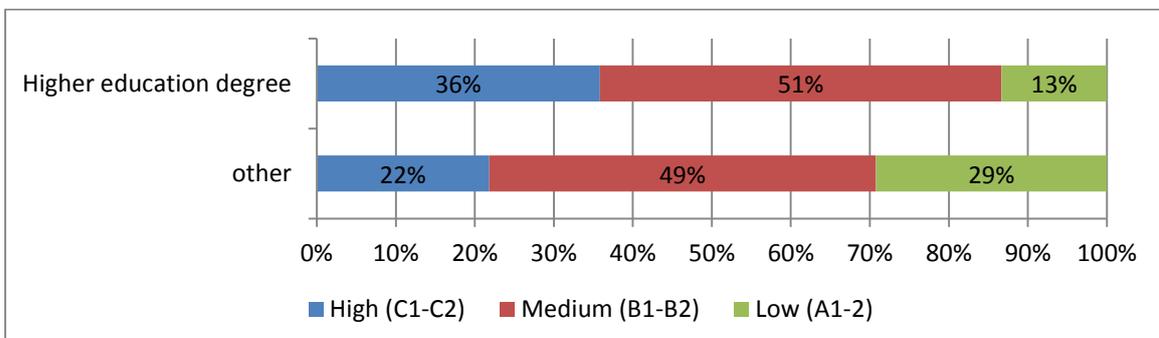
Source: Interviews with employers, ICF International, 2015. Response to the question: For a [job title], what is the required/desired level of ORAL proficiency in [language 2]? and How many years of work experience are usually required for this kind of position? Note: As cell size for later labour market careers (15<) is very low (18), this category is not reported here.

Figure 16: Demanded level of written skills for second most useful foreign language, by work experience



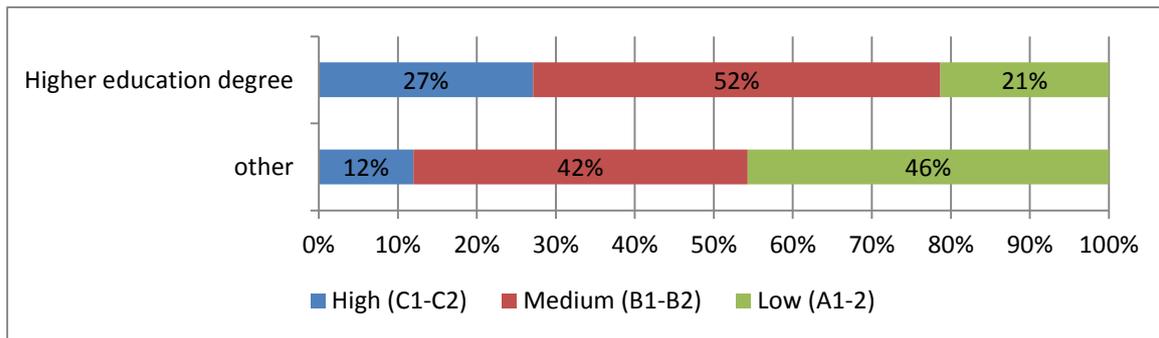
Source: Interviews with employers, ICF International, 2015. Response to the question: For a [job title], what is the required/desired level of WRITTEN proficiency in [language 2]? and How many years of work experience are usually required for this kind of position? Note: As cell size for later labour market careers (15<) is very low (18), this category is not reported here.

Figure 17: Demanded level of oral skills for second most useful foreign language, by education level



Source: Interviews with employers, ICF International, 2015. Response to the questions: For a [job title], what is the required/desired level of ORAL proficiency in [language 2]? and Is a higher education degree necessary to do the job?

Figure 18: Demanded level of oral skills for second most useful foreign language, by education level



Source: Interviews with employers, ICF International, 2015. Response to the questions: For a [job title], what is the required/desired level of WRITTEN proficiency in [language 2]? and Is a higher education degree necessary to do the job?

No clear relationship between the level of skills demanded for the second most useful language in the enterprise and enterprise size emerges from the data (not shown here).

4.4.3 Summary

The data collected shows that overall employers tend to demand a higher level of oral than written skills for both the most and second most useful language. Job roles most clearly requiring higher levels of oral than written skills are those with a strong customer service focus, such as receptionists and waiters, commonly found in the Accommodation and food service sector. The Professional, scientific and technical sector is distinct from the other sectors in that employers want equally high levels of oral and written proficiency from employees.

For the most useful foreign language, employers interviewed most often ask applicants to have high (C1-C2) or medium level (B1-B2) foreign language proficiencies, enabling them to effectively communicate with native speakers, even if interaction is limited to familiar contexts. The demanded level of foreign language skills for the most useful foreign language is positively associated with the job level. Jobs requiring a higher education degree tend to have higher foreign language requirements.

For the second most useful foreign language, employers interviewed most often asked for medium level skills (B1-B2), both in oral and written competences. More employers are content with a lower level of proficiency (A1-A2), enabling workers to transmit short and simple messages both orally and in writing. The positive relationship between the job level and the level of required foreign language skills found for the most useful foreign language is less clear for the second most useful foreign language.

4.5 How do enterprises indicate/specify the level of competence required?

Very few of the employers interviewed mentioned the use of the Common European Framework of Reference for Languages (CEFR) in their vacancy advertisements. While some were aware of it they did not always use it because "job seekers don't know necessarily know of the classification"

Other formal classifications of language levels were also seldom mentioned by interviewees. A Swedish employer association in the trade of motor vehicles stated that they have just started working on a qualification framework for the sector which they refer to as trade requirements which would include skills such as foreign language competences. Other interviewees referred to classifications used in

internationally recognised exams such as those of the Educational Testing Service (e.g. Test of English for International Communication (TOEIC)).⁸⁶

Most interviewees in all countries described language levels by using terms such as:

- Basic or low, fair, medium or intermediate, good, high or advanced (mentioned by employers from BE-nl, BG, DK, EE, EL, HU, IT, LT, PT, SE, SK)
- Proficient (BE-nl, BE-fr, LU, SI), good knowledge (AT, BE-nl, BE-fr, LU), very good or excellent (AT, EL, IT)
- Ability to negotiate (DE, AT)
- Fluent (BG, CY, CZ, DE, DK, ES, HU, IT, LU, MT, PL, PT, SE, SK, UK)
- Conversational level (MT), communicative (PL)
- Native (CY), bilingual (ES), trilingual (LU)
- Passive (comprehension of oral/written language) and active (ability to communicate autonomously) (CZ, SK, SI)
- Expressions such as '(language name) is an asset/is an advantage/is essential' (BE-fr, DE, LU); "reliable and practical language knowledge" (HU), "working proficiency, able to work in a foreign language environment" (SI). Some expressions refer to the need for both oral and written skills, e.g. "very good written and oral knowledge" (CY, FR).
- A description of the tasks to be carried out using a foreign language. For instance, in Denmark and Sweden vacancy notices might specify that the future employee is expected to communicate in English (or other foreign languages) with customers or clients.

Job portals may also have their own scales. For instance, a leading job portal in Slovakia uses a six-point scale: basic, advanced, active, expert (including interpreting), mother tongue. In some cases, a level is not specified.⁸⁷

The fact that many employers do not use a formal classification, or do not even refer to a language level in any form, has been explained by several interviewees as a way to avoid discouraging people from applying on the basis of their foreign language skills. An employer from Portugal explained that "we don't refer to a specific level of proficiency not to narrow the recruitment field"⁸⁸. A Belgium company from Wallonia mentioned that they deliberately lower the language requirements when advertising a position "In order not to frighten candidates, to be sure to have some candidates, when we advertise a position, we do not mention that foreign languages are 'essential', but 'important'. Half of the candidates would not apply if you stated that it is essential to have a very good knowledge of Dutch."⁸⁹

In the UK, for example, most businesses across all sectors advertised for 'knowledge' of a foreign language if languages skills were desired for the role. One company in the accommodation and food services sector stated that knowledge of other European languages "would be an advantage", as it was not essential to the role. An interviewee in the professional services sector stated that they have different requirements depending on whether the candidate is a UK national or foreign national.

"If the candidate is a UK national, we usually require them to be able to speak the language to a minimum of degree level. That way we know they would have some cultural knowledge of the country too [through the Erasmus system]. For foreign

⁸⁶ 9, Manufacturing, Spain

⁸⁷ Mentioned by interviewees from BEfl, EE, FI, HR, LU.

⁸⁸ 20, Wholesale and retail trade, Portugal

⁸⁹ 9, Wholesale and retail trade, Belgium (Wallonia)

nationals, they are all native speakers so it is assumed they have a high competency⁹⁰.

Some employers indicated that they specified other skills more exactly than language skills. For instance, an Estonian employer stated that their “first priority is professional skills and then language, as language can always be improved to the level required”,⁹¹ while another said that “we would rather invest in a freshly graduated engineer and teach him/her the foreign language, than hiring someone with poor professional, but fluent language skills”.⁹² Similarly, a Croatian employer from the Professional sector mentioned that “We rarely have problems with knowledge of English in our sector and we test them anyway. For us it is most important that the candidate can efficiently and effectively do the job, everything else they [the candidates] will pick up during their work”.⁹³

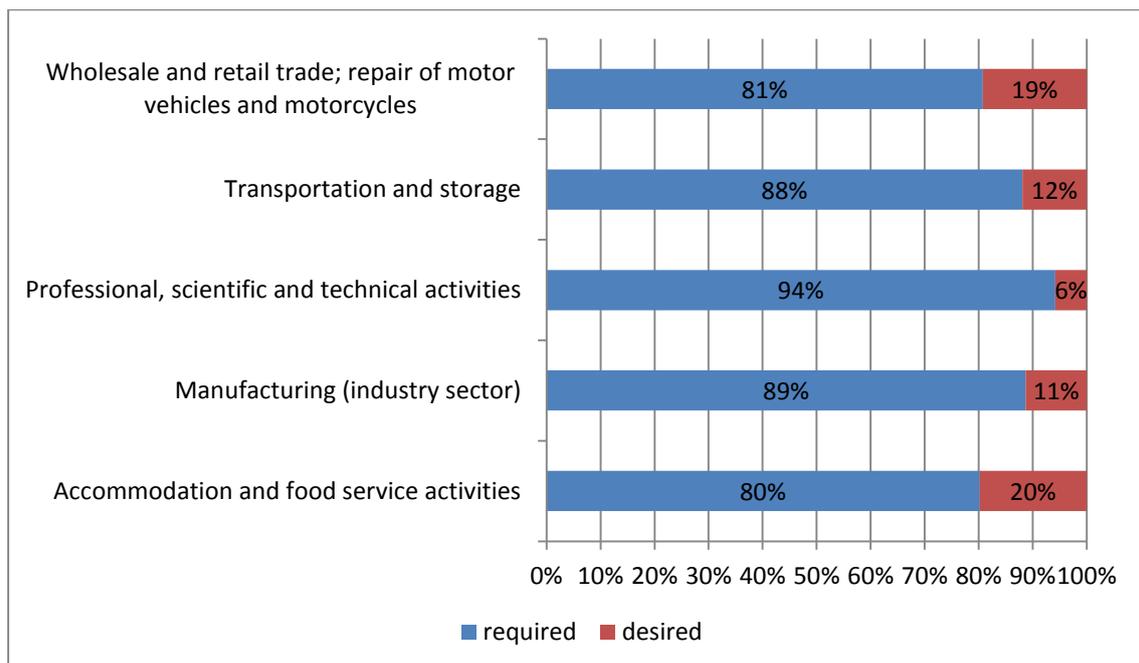
Related to this, the extent to which foreign language skills are a career driver and a comparative advantage for job seekers is further discussed in Section 4.11.2.

4.6 Extent to which languages are required or desired by employers

4.6.1 Extent of language skills being required for jobs

In the Professional, scientific and technical sector almost all of the employers interviewed stated that their most important language was required for the role, rather than just a desirable element, as shown in Figure 19. In the other sectors, most employers still stated that their most useful language was a requirement.

Figure 19: Share of employers requiring the most useful language, by sector



Source: Interviews with employers, ICF International, 2015. Response to the question: For a [job title], is knowledge in [language 1] required or desired?

When these data are considered by country (not shown here) there is more variance between the proportions of employers on the one hand *requiring* and on the other simply desiring language skills, than there is among the sectors. These findings must

⁹⁰ 3, Professional, scientific and technical activities, UK

⁹¹ 12, Accommodation and food service activities, Estonia

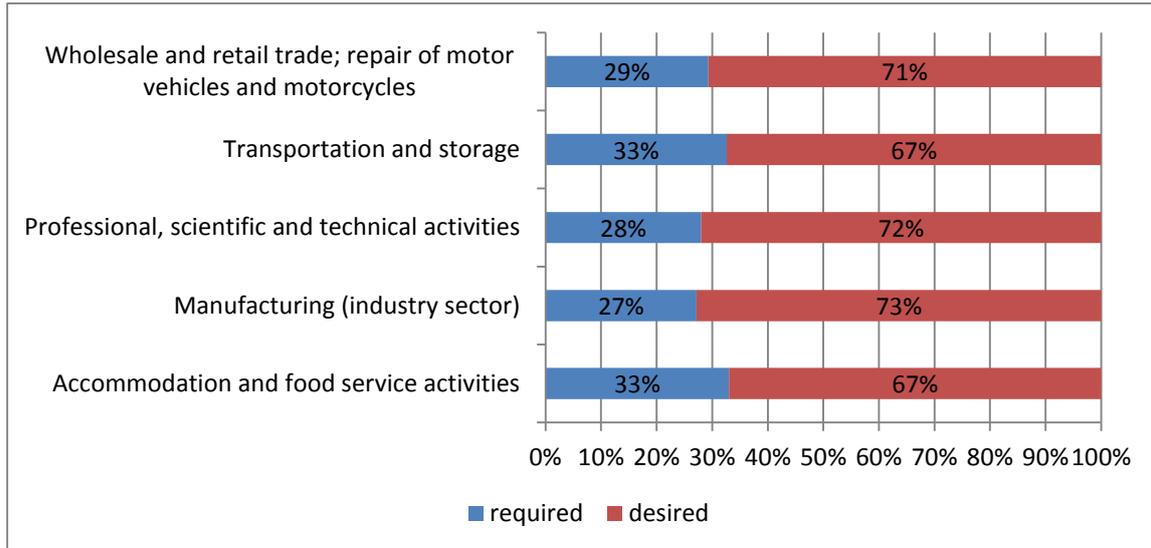
⁹² 15, Professional, scientific and technical activities, Estonia

⁹³ 4, Professional, scientific and technical activities, Croatia

be treated with some caution because this variability may be a function of fewer observations than the analysis of sectors.

Three quarters of surveyed employers required or desired a second language. The second most useful language is much less often required than the most useful language, as can be seen in Figure 20. For about one third of the job roles discussed in the interviews, employers stated that a second language is required. Considering differences across sectors, job applicants are most often required to have foreign language knowledge in two languages in the Accommodation and food service activities sector, followed by the Transportation and storage sector (a third or more).

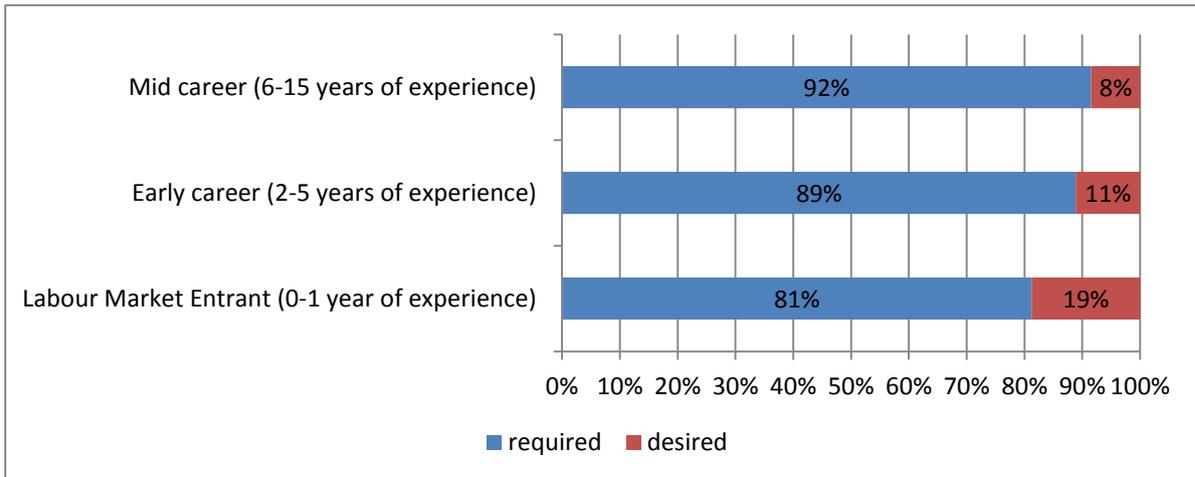
Figure 20: Share of employers requiring the second most useful language, by sector



Source: Interviews with employers, ICF International, 2015. Response to the question: [For a [job title], is knowledge in [language 1] required or desired?] And for [language 2]?

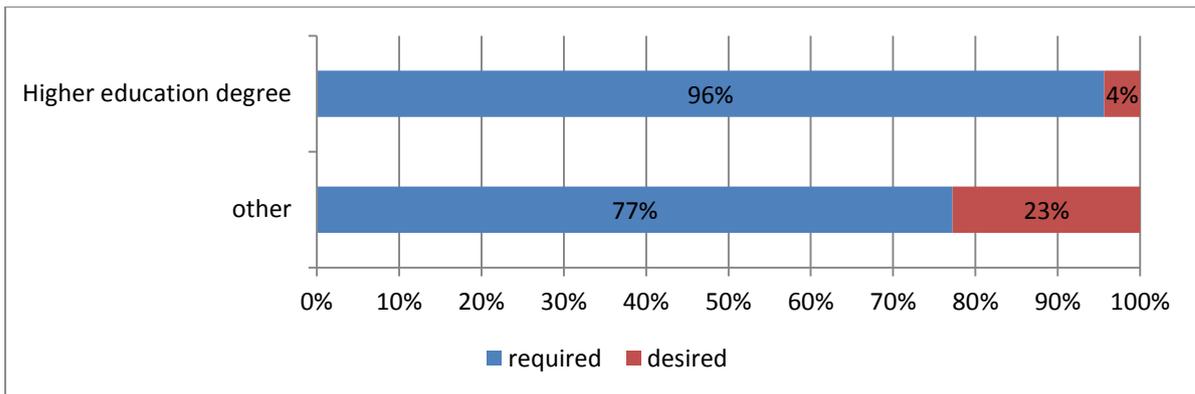
Employers surveyed indicated that required language skills for the most useful foreign language increase with both educational requirements and work experience (with some weakening of this trend in later career). For labour market entrants, employers' most useful languages are required by over three quarters with the share of employers requiring their most useful language increasing at each stage of a person's career from early career to mid-career (Figure 21). A greater difference in the share of employers requiring their most useful language is observable for educational attainment necessary to do the job but more than three quarters require it for jobs without a degree (and Figure 22).

Figure 21: Share of employers requiring their most useful language, by career stage



Source: Interviews with employers, ICF International, 2015. Response to the question: For a [job title], is knowledge in [language 1] required or desired? Note: As cell size for later labour market careers (15<) is very low (18), this category is not reported here.

Figure 22: Share of employers requiring their most useful language, by education level



Source: Interviews with employers, ICF International, 2015. Response to the question: For a [job title], is knowledge in [language 1] required or desired?

The extent to which second most useful languages are required or desirable is less clear when examined by career stage. The data (not shown here) suggest that with more experience the more desirable, rather than essential, employers' second most useful languages become. While about a quarter of employers recruiting for mid-career positions stated that their second most useful language is required, this is about a third of employers recruiting for entry and early career positions. Educational requirements seem to be unrelated to whether a second foreign language is required or desired (not shown here).

There is no association between the size of the business and the most or second most useful foreign language being required.

4.6.2 Summary

Employers more often required a specified level of competency in the most useful foreign language in their job specifications than desired it where language skills are needed for the job. In the Accommodation and food service activities and the Wholesale and retail trade sectors around three quarters of employers stated that their most useful language was a requirement. In the other three sectors, almost all (more than 9 in 10) defined the most useful foreign language as an essential requirement of the job. Higher level jobs (in terms of required work experience and

educational attainment) more often require the competency specified in most useful foreign language than lower level jobs.

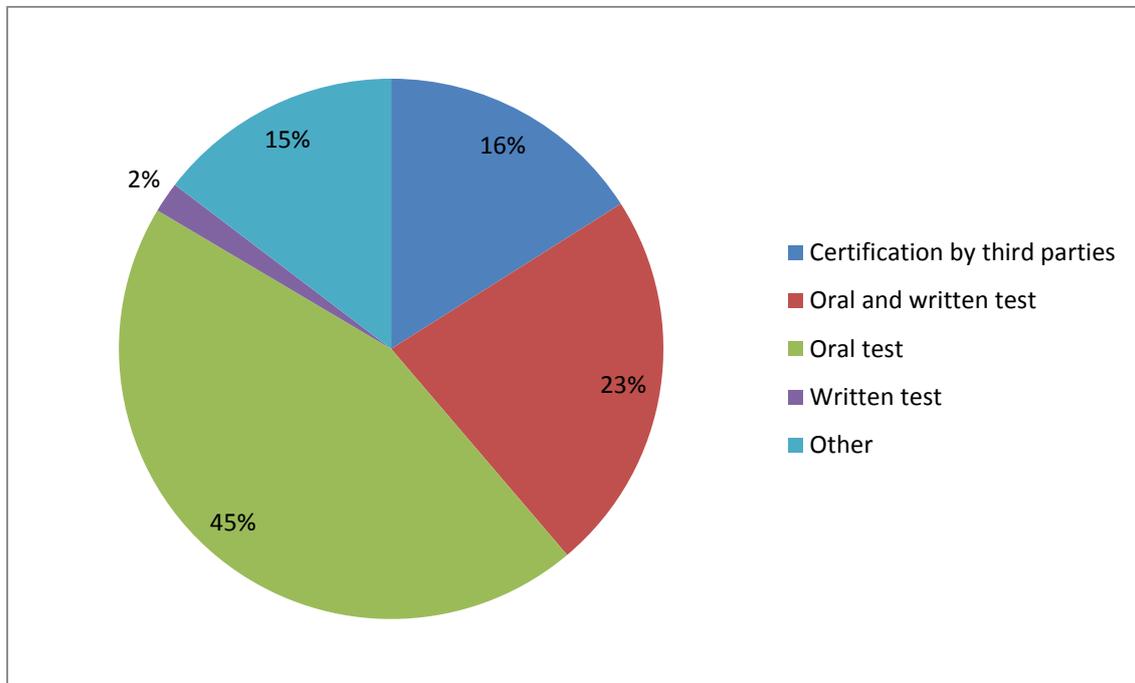
Competency in the second most useful language is much less often required than competency in the most useful language. The highest share of employers requiring rather than desiring competency in the second most useful language can be found in the Accommodation and food service activities sector (almost 4 out of 10). In the other sectors between one quarter and one third of employers require competency in the second most useful language. There is no clear relationship between the job level and likelihood of the second most useful language being required for the job.

4.7 How do enterprises verify the language skills of recruits?

4.7.1 Verification of language skills

The most common method of verification of language skills reported by interviewees are oral tests, followed by both written and oral tests, certification by third parties, other methodologies and, lastly, written tests (Figure 23).

Figure 23: Method of verification of language skills of recruits



Source: Interviews with employers, ICF International, 2015. Response to the question: How do you verify the language skills of recruits? In your view, which one of these methods is most important and why?

Oral tests usually include conducting (parts of) the job interview in a foreign language, but can also include short exercises related to the tasks which will need to be performed by the future employee. For instance, a Swedish employer said that “oral language tests during the job interview are by far the best way of verifying the language skills of applicants so that they match the needs of our company”⁹⁴ and a Luxembourgish employer said that “we test the skills during the interview. Most of our colleagues speak several languages. One can notice straight away if the candidates are at ease with the foreign language or not”.⁹⁵

As for the development of oral tests these are most often created by employers. An automotive trade, services and related activities association stated that for car dealers, candidates usually have to role-play a sale in a foreign language, while car

⁹⁴ 13, Wholesale and retail, Sweden

⁹⁵ 11, Manufacturing, Luxembourg

mechanics have to read a manual/guide in a foreign language and then present it orally.

The interviewers and those responsible for the oral and written tests are often among the company's staff, but are not necessarily the people in charge of recruiting to the post, who may not have the language skills. Companies may ask for the support of other workers with a high level of proficiency in the required foreign language. For instance, an Estonian employer specified that *"we have enough employees with a good level of English, Russian and Finnish to participate in recruitment interviews"*.⁹⁶

There are also numerous cases where interviewees commented that staff undertaking interviews read the job applications, study the grades and generally trust what the applicants write about their language competences.⁹⁷

In fewer cases do employers use external language tests.⁹⁸ When the skill levels demanded are high, companies sometimes subcontract foreign language services to validate applicants' foreign language competency levels. A Czech employer for example reported the use of *"telephone interviews with consultants on foreign languages to recruit for dispatchers with high levels of responsibility"*⁹⁹ While an Estonian engineering business said that *"As we need very high level of professional foreign language competence, we use language companies to test candidates' language skills"*.¹⁰⁰

Similarly in France, in the manufacturing sector, several employers and one interviewee of an employer's association indicated that some written tests were also done during the recruitment process. Usually, however, *"this is an expensive and time-consuming process, so it is outsourced to companies that specialise in doing this"*.¹⁰¹

With certification by third parties, a few employers use school certificates as proof of language skills (examples in DE, FI, MT¹⁰²) while others refer to recognised language examinations. For example, a manufacturing company in Spain required the Cambridge English Language Assessment exams (Cambridge ESOL) in their vacancy notices in the following terms: *"Civil engineer with First Certificate Examination in English competences is needed"*.¹⁰³ And, a large chemical enterprise in Spain¹⁰⁴ requires that candidates pass the Test of English for International Communication (TOEIC) with 750 points.¹⁰⁵ Several Greek employers reported on efforts to set up standard forms of oral and written tests in the tourism industry: *"We have been negotiating with the British Council for the creation of a specific 'hotel test' for the examination of applicants; it will hopefully be ready soon"*.¹⁰⁶

Apart from language tests and certificates by third parties, some employers value experience abroad as proof of foreign language skills (mentioned by employers from DK, BG, EL, ES, IT, LT, SE¹⁰⁷), while others stated that language skills are mainly

⁹⁶ 12, Accommodation and food service activities, Estonia

⁹⁷ For example, 12, Accommodation and food service sector, Denmark; 8, Manufacturing, Germany; 7, Accommodation and food services, Finland.)

⁹⁸ Mentioned by interviewees from BEfr, BEfl, CZ and PT.

⁹⁹ 4, Transport and storage, Czech Republic

¹⁰⁰ 15, Professional, scientific and technical activities, Estonia

¹⁰¹ 22, Manufacturing, France

¹⁰² E.g. 8, Manufacturing, Germany

¹⁰³ 5, Manufacturing, Spain

¹⁰⁴ 9, Manufacturing, Spain

¹⁰⁵ A level of 750 is similar to CEFR level C1.

¹⁰⁶ 12, Accommodation and food service activities, Greece

¹⁰⁷ E.g. 1, Manufacturing, Denmark; 23, Wholesale and retail trade, Bulgaria.;1, Professional, scientific and technical activities, Greece; 7, Transportation and storage, Spain. Sector body, Professional, scientific and technical activities, Sweden

verified at work, for instance during the probation period (mentioned by employers from DK, EE, EL, LT, MT, PT, and SE¹⁰⁸).

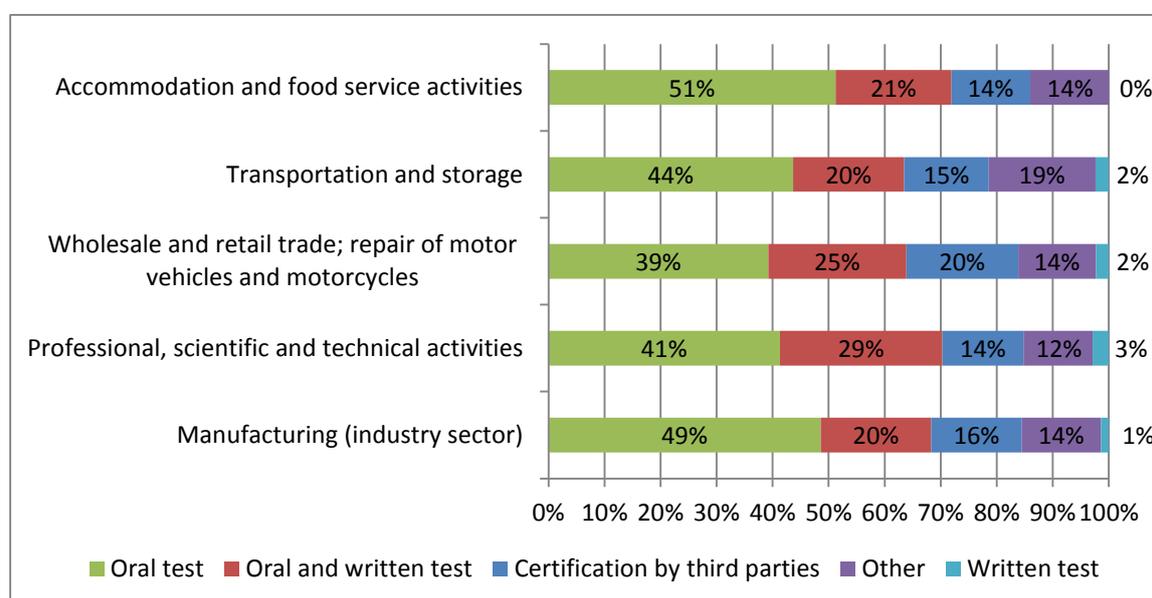
In some cases vacancy notices in online portals are posted in a foreign language and the application may also have to be filled in that language (this was mentioned by employers from CY, DE, FI¹⁰⁹). For instance, in Cyprus, the majority of employers are putting vacancy notices in English and in Russian when these are the language skills required. Some Czech employers mentioned that they required CVs and covering letters to be written in foreign languages from job applicants, as a means to assess their level.

Figure 24 presents the share of employers using a particular foreign language proficiency verification method by sector. The data indicates that:

- In all sectors oral skills are more likely to be assessed than written skills;
- Oral tests are more commonly used on their own in the Accommodation and food service sector than other sectors. This is especially true when compared to the Wholesale and retail trade; repair of motor vehicles and motorcycles and the Professional scientific and technical activities sectors;
- The Manufacturing and Professional scientific and technical activities sectors are more likely to use both oral and written tests (around a third of employers).
- The most significant use of certification by third parties takes place within the Wholesale and retail trade; repair of motor vehicles and motorcycles sector (one fifth of survey respondents).

This seems broadly consistent with the evidence presented above in relation to level of language skills needed and the job roles requiring language skills in each sector.

Figure 24: Method of verification of language skills of recruits, by sector



Source: Interviews with employers, ICF International, 2015. Response to the question: How do you verify the language skills of recruits? In your view, which one of these methods is most important and why?

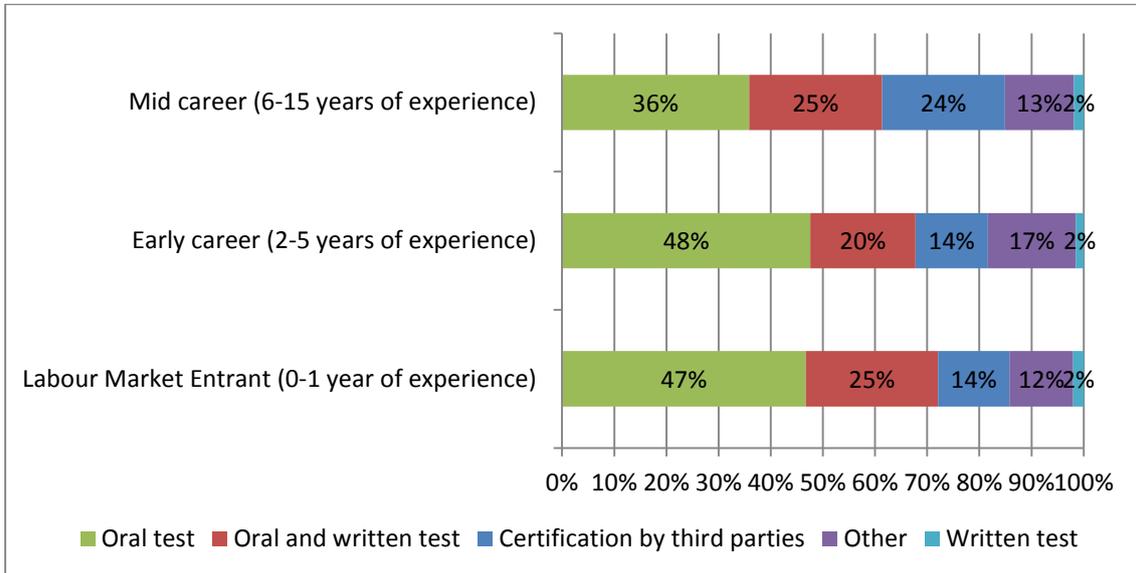
Data on the type of verification method by work experience and by education level indicates that the use of both oral and written tests remains at a fairly consistent level

¹⁰⁸ E.g. 21, Wholesale and retail trade, Denmark; 2, Manufacturing, Greece; 10, Manufacturing, Lithuania; 1, Wholesale and retail trade, Portugal; 3, Wholesale and retail trade, Sweden.

¹⁰⁹ E.g. 24, Transportation and storage, Finland

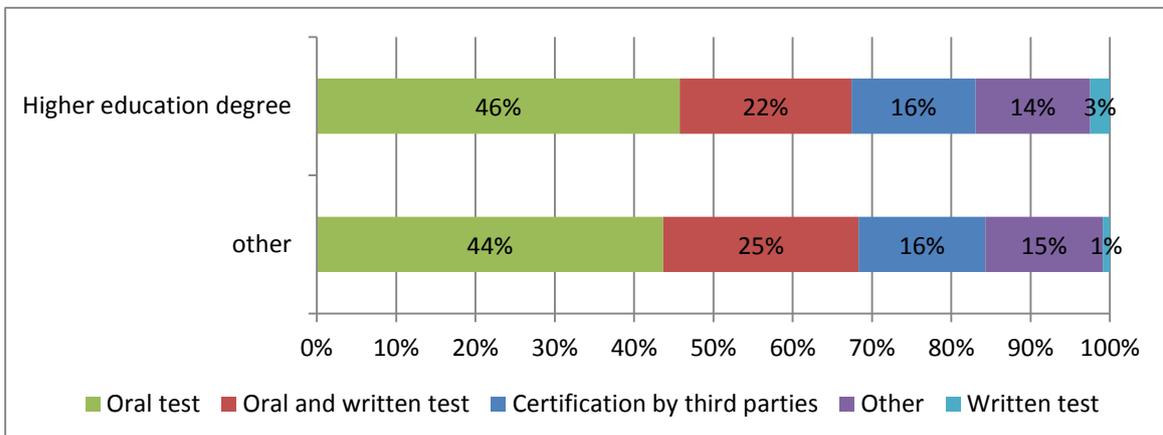
when recruiting for labour market entrants, early career positions, and mid-career positions (between one fifth and one quarter). Use of certification by third parties appears to become more frequently used as seniority increases. There is little difference between the methods of verification used by employers when considered by qualification required (Figure 25 and Figure 26).

Figure 25: Method of verification of language skills of recruits, by work experience



Source: Interviews with employers, ICF International, 2015. Response to the question: How do you verify the language skills of recruits? In your view, which one of these methods is most important and why? And How many years of work experience are usually required for this kind of position? Note: As cell size for later labour market careers (15<) is very low (18), this category is not reported here.

Figure 26: Method of verification of language skills of recruits, by education level

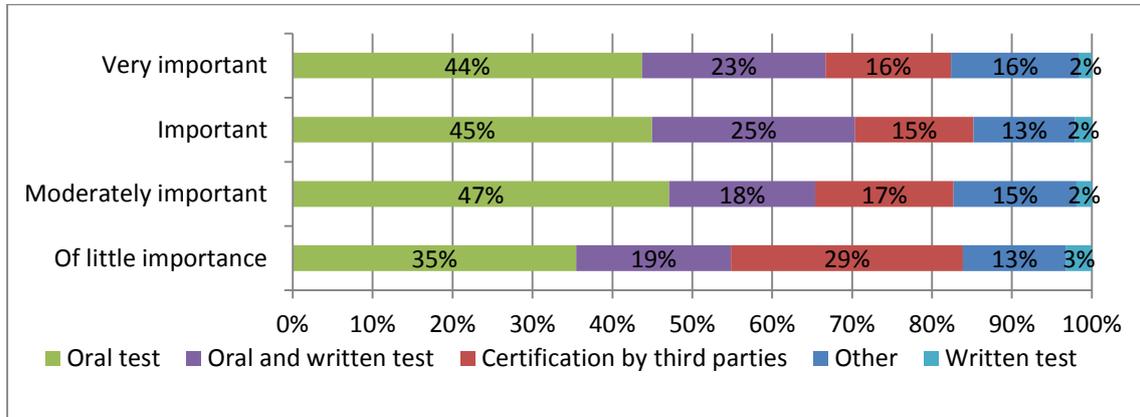


Source: Interviews with employers, ICF International, 2015. Response to the question: How do you verify the language skills of recruits? In your view, which one of these methods is most important and why? And Is a higher education degree necessary to do the job?

The type of verification method used seems to have only a fairly weak link with the significance of the foreign language skills in jobs. Whilst use of both oral and written tests is used by about a quarter of employers where it was stated language skills of recruits were very important or important, a similar share of employers used these methods where language skills were described as unimportant (Figure 27). For recruitment where language skills were of little importance, the share of employers using certification by third parties is highest. A possible reason for this may be as

explained by a Hungarian employer *"it happens that even if an applicant has a foreign language examination certificate, their knowledge is not active or they have problems in verbal communication so we test their skills"*.¹¹⁰

Figure 27: Method of verification of language skills of recruits, by the degree of importance given to foreign language skills



Source: Interviews with employers, ICF International, 2015. Response to the question: How do you verify the language skills of recruits? In your view, which one of these methods is most important and why? And How important is knowledge of a foreign language for persons applying for a position as [job title] to get the job? Is it unimportant, of little importance, moderately important, important, very important? Note: As only 12 employers stated that foreign language skills were unimportant for the job, this category was omitted from this analysis due to low cell size.

4.7.2 Summary

There are a wide range of methods employers use to verify applicants' foreign language proficiency, from looking for international experience in CVs to relying on school grades or language certificates from testing services. Relatively few employers appear to use Europass self assessments to the levels of the CEFR.

Half of employers interviewed use oral tests to assess candidates' foreign language skills as part of the job interview, with some variation across sectors although these are not generally objectively linked to competency levels. While in the Accommodation and food service activities sector where oral communication is considered to be more important, almost two thirds of employers use oral tests for language skills verification. This compares with just over one third of employers in the Wholesale and retail trade; repair of motor vehicles and motorcycles sector where certificates by third parties are more commonly used. Written foreign language skills are more often tested when recruiting for higher job levels, with little difference when considered by sector. There appears to be a positive relationship between the use of verification methods which are more sophisticated and can be tailored to the specific needs of the employer, such as oral tests and written tests (or both), and the importance of foreign language skills for the job.

4.8 What are enterprises doing to meet their needs in relation to foreign languages?

4.8.1 Training and development

Most employers meet their needs for foreign language skills by recruiting people with these skills. Training is not generally used as a solution beyond increasing the level of existing language skills.

A few employers interviewed mentioned training in foreign languages for workers. For instance, a Transportation sector employer from Germany explained that *"during the*

¹¹⁰ 8, Manufacturing, Hungary

soccer world championship in 2006, we provided English language training for all drivers, to ensure they will be able to speak to international customers".¹¹¹ A Slovenian employer mentioned that "the management decides and organizes external language courses; the whole team took Spanish, because none of us spoke it, otherwise we sometimes have individual English lessons".¹¹²

Of all training offered by companies, foreign language training is not believed to be a significant component of training and development programmes. Investment in training in foreign language is often reported to be smaller than that of training in other skills. For instance, one national association in the Transportation sector reported that while 40% of employers' total training budget is allocated to IT skills, 30% of it goes to technical skills, 20% to communication (not including foreign language training) and management and 10% to languages. An employer organisation in the Professional sector believed that "Only 50% of employers invest in training, or in general staff development, and only 2% in language training, which constitutes a small group of employers"¹¹³.

Some interviewees felt that the recession had reduced employers' expenditure on training in language skills. "It was often offered by the company to promising professionals to improve their language skills and it was also seen as a sort of additional non-financial benefit for employees prior to the 2008 crisis. This has changed. Now it is more up to the individual employee to increase their competitiveness and value for employers".¹¹⁴ "Employers are willing to offer language training, but with the lowest cost possible. It happens, but for few hours, it is not sufficient".

For several of these, with higher unemployment rates a larger pool of applicants is available with all the skills required, including languages so reducing the need for training.¹¹⁵ "Employers [in the Accommodation and food services sector] aren't willing to invest in foreign language skills; they will just hire another worker." A similar issue exists in Croatia, with one interviewee noting that the supply of workers dictated that employers did not have to invest in language training:

"Anyone who wants to pursue a career in tourism is well aware that they will need at least two foreign languages. It is unlikely that someone who does not master foreign languages will ever consider applying for a position in hospitality sector. In Croatia we also have a good coverage of languages, so the training provided by the companies is usually connected more to other sets of skills."

Some employers also stressed the importance of on-the-job learning, in which daily use of the foreign language and contact with native speakers led to significant improvements in employees' language competences. "We take on apprentices who develop their professional language skills communicating while working at the company, interacting with customers, retailers or colleagues in other countries."¹¹⁶ "We have native speakers [in the company] who organise Language Cafés."¹¹⁷

4.8.2 Recruitment of native speakers

Under a quarter of employers mentioned having recruited or seeking a native speaker (foreign national) to fill a job with a foreign language skill required in the previous 12 months (Figure 28).

¹¹¹ 2, Transportation and storage, Germany

¹¹² 7, Transportation and storage, Slovenia

¹¹³ Professional, scientific and technical activities, Poland, employer/sector organisation 2.

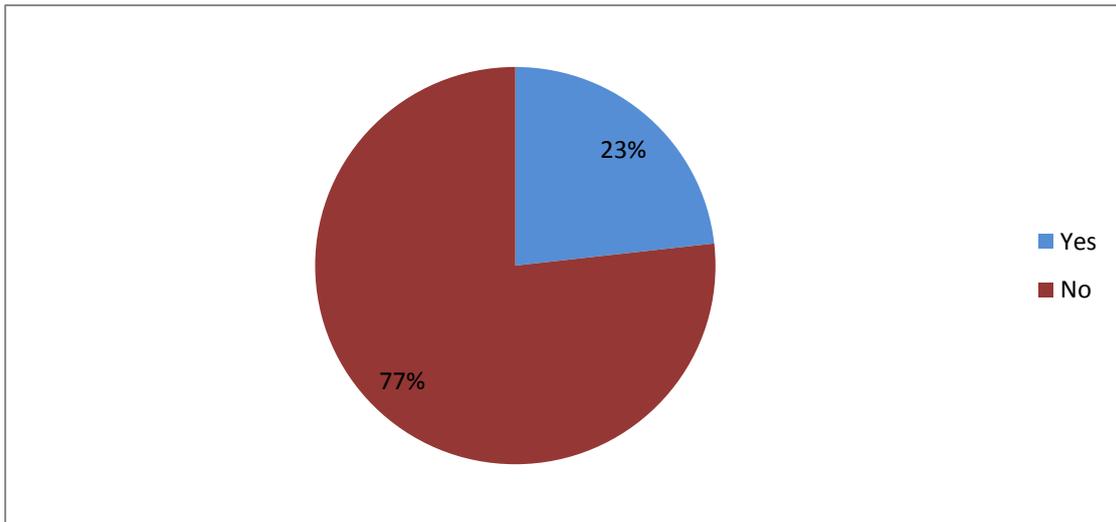
¹¹⁴ 3, Professional, scientific and technical activities, Slovak Republic

¹¹⁵ Mentioned by Italian interviewees.

¹¹⁶ 10, Transportation and storage, Denmark

¹¹⁷ 17, Transportation and storage, Austria

Figure 28: Percentage of employers who have hired a foreign national to fill a foreign language bottleneck vacancy in the previous 12 months



Source: Interviews with employers, ICF International, 2015. Response to the question: Have you recruited a foreign national to fill a foreign language bottleneck vacancy in the previous 12 months?

Where this has happened, it is often because employers needed a specific and less common foreign language, typically not English. In Sweden in the Wholesale and retail trade sector "Some enterprises have recruited employees from Spain or Germany in order to find mechanics with the necessary language skills."¹¹⁸ In Greece, employers in the Accommodation and food service activities sector regularly recruit native speakers in a wide range of languages (Czech, Russian, other languages from the Balkans, and Spanish) to reflect the first languages of visitors.¹¹⁹ In Austria, one employer stated that the company had just recruited an Indian national because managers believed this to be useful for future business development activities in India, while another employer had taken on a Taiwanese national who is now in charge of organising workshops and communicating with the marketing and advertising office in Beijing to make sure that the company values and standards are well understood.

While recruiting native speakers may help businesses satisfy foreign language skill demand, interviewees indicate that this is often only an option if recruits have sufficient knowledge of the company language:

"Sometimes an Italian person comes to us to apply for a job that we need Italian for, but they also have to know English. When they don't, then we can't employ them."¹²⁰

The extent to which native speakers are sought from their native country appears to depend on the extent of migrants within the national labour market. Employers in Denmark reported that they could generally find people with Spanish, French and Russian language skills from residents in Denmark. This is equally the case in Portugal¹²¹ where native speakers could also be recruited from among young people attending higher education programmes through Erasmus exchanges.¹²²

The ability of employers to take advantage of the pool of migrants in the national labour markets may depend on geographical factors. A Greek employer indicated that recruitment difficulties arose as a result of his enterprise being "situated in the

¹¹⁸ Employers' association, Wholesale and retail trade, Sweden

¹¹⁹ 5, Accommodation and food service activities, Greece; 7, Wholesale and retail trade, Greece; 8, Accommodation and food service activities, Greece

¹²⁰ 11, Wholesale and retail trade, Malta

¹²¹ E.g. 7, Professional, scientific and technical activities, Portugal; 12, Manufacturing, Portugal

¹²² Employer association, Accommodation and food service activities, Portugal

province, where few migrants are available with languages I need, such as Russian and Bulgarian etc."¹²³

A few interviewees in several countries (CZ, LU) indicated that they had increased pay to recruit and retain staff with particular language skills/high level competences. ¹²⁴¹²⁵

4.8.3 Summary

Most employers meet their needs for foreign language skills by recruiting people with the required skills. Training generally focuses on increasing the level of existing language skills rather than providing training in new foreign languages to their employees or raising existing or new employees' language skills to much higher levels of competency.

One in five employers reports having hired a native speaker (foreign national) in the past 12 months. The most frequently reported reason for hiring native speakers is the difficulty of filling positions which require a high level of proficiency in a specific and less common language. The data analysis conducted for this study does not suggest that the ways in which businesses meet their foreign language requirements is related to firm sector or size.

4.9 What challenges do enterprises face in meeting their needs for foreign language skills?

This section considers the extent to which employers have faced difficulty in filling jobs as a result of a lack of language skills and the reasons for this difficulty.

4.9.1 Extent to which enterprises face difficulties in filling vacancies

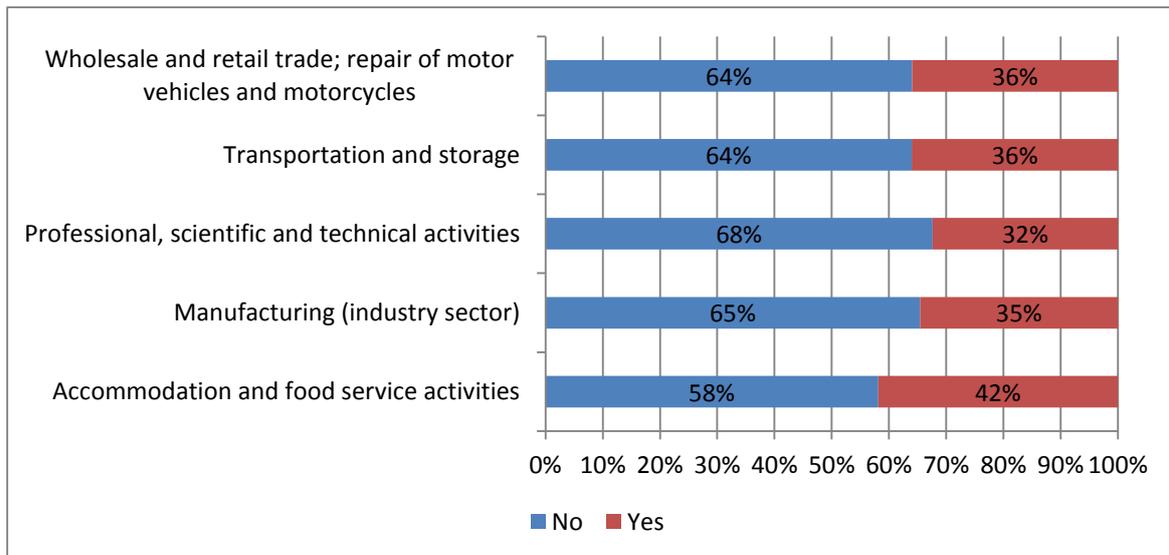
Around one third of employers reported that they had difficulty in filling positions as a result of a lack of language proficiency among applicants, with two-thirds stating that this was not an issue which inhibited their ability to recruit necessary staff. This was fairly consistent among all sectors, with a slightly higher level of reported difficulty in filling positions as a result of a lack of language proficiency in the Accommodation and food service activities sector, as shown in Figure 29.

¹²³ 13, Transportation and storage, Greece

¹²⁴ Employer association, Wholesale and retail trade, Luxembourg; 11, Manufacturing, Luxembourg; 3, Professional, scientific and technical activities, Luxembourg; Employers' association, Professional, scientific and technical activities, Luxembourg

¹²⁵ 13 and 23, Accommodation and food services, Czech Republic; 4 and 11, Transportation and storage, Czech Republic

Figure 29: Share of employers reporting difficulties in filling positions as a result of a lack of language proficiency of applicants, by sector



Source: Interviews with employers, ICF International, 2015. Response to the question: Are vacancies for [job title] hard to fill because of a lack of applicants' language skills?

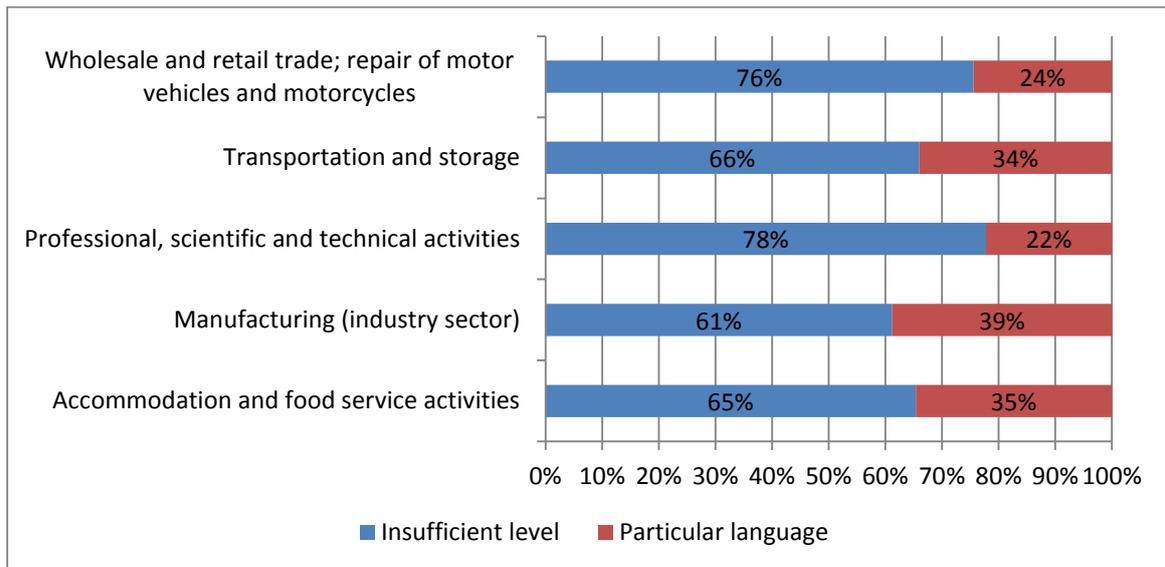
There is some variance between countries but there appears little difference between positions which require a higher education degree and those that do not, as well as those requiring more or less work experience when it comes to employers reporting difficulties in filling vacancies as a result of lack of language proficiency.

Considering the data by business size shows that just less than half of medium sized businesses report difficulties in filling vacancies as a consequence of a lack of applicant language proficiency, while less than one third of small and large firms reported such difficulties.

4.9.2 Reasons why vacancies are hard to fill

Figure 30 illustrates that, of those employers that have difficulty in filling vacancies, most attribute this difficulty to the language proficiency of candidates not meeting the required level, with just less than one third stating that the level was not as important as the fact that they could not find suitable candidates with the particular language that they needed. The findings are consistent across most sectors with the exception being the Wholesale and Professional, scientific and technical activities sectors. In these sectors the share of employers experiencing difficulty in recruitment as a result of insufficient level (rather than the particular language required) of language among candidates is higher than other sectors. This may be explained by the higher level of foreign language skills demanded in this sector (see Figure 6 and Figure 7, Section 4.4.1)

Figure 30: Reason why vacancies are hard to fill, by sector



Source: Interviews with employers, ICF International, 2015. Response to the question: [If employer experienced difficulties] Is this because of an insufficient level of applicants' language skills or are you unable to find applicants proficient in the particular language you are demanding?

When the analysis of particular reasons for difficulty in filling positions is undertaken by country the results show variances (though this is based on very small numbers). In countries where there was some reported difficulties indicated in filling vacancies the evidence gathered through interviews suggests that that this is mostly the result of a lack of supply of candidates with the required level of language competences. This suggests that there may be insufficient or mismatched language competences compared with employer requirements. A sector expert from Hungary stated that:

"While compared to the European Union average the number of foreign language lessons in school-based education is relatively high they remain ineffective. Education is not really practice-focussed and not enough emphasis is laid on practically useful language skills at school."¹²⁶

An industry expert in Ireland had similar concerns. "Poor language learning opportunities at school, coupled with a general complacency among recruits that foreign languages are not important because they already speak English, means there are not enough applicants with the necessary language skills. With an increasing future demand, this problem will likely only get worse"¹²⁷.

Further evidence of a mismatch between supply and demand is provided by interviewees in Latvia. One stated that the nature of the problem for employers was changing and that "More young people speak English, but often they do not speak Russian at all."¹²⁸ Another employer said that "Increasingly those who are younger than 30 have problems with the Russian language, but their English language skills have improved."¹²⁹

Recruitment issues in relation to languages do not differ in relation to the required number of years of work experience nor to the level of educational attainment required for jobs.

¹²⁶ Sector body, Wholesale and Trade of Motor Vehicles and Motorcycles, Hungary

¹²⁷ 12, Professional, scientific and technical activities, Ireland

¹²⁸ 22, Professional, scientific and technical activities, Latvia

¹²⁹ 8, Professional, scientific and technical activities, Latvia

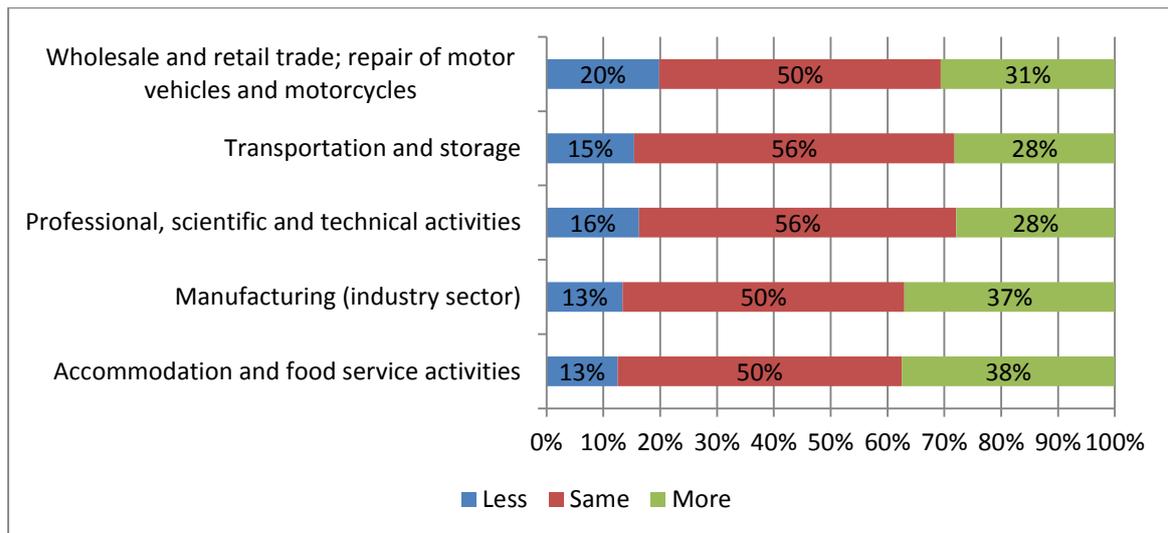
4.9.3 Bottleneck trends

During the interviews, employers were asked whether they believed that vacancies in their enterprise are currently difficult to fill, and which they anticipate will be difficult to fill in future as a result of a lack of foreign language proficiency of job applicants. These data illustrate that of those jobs that are currently hard to fill, about one third of employers stated they were harder to fill in the past. Less than a quarter suggested that these positions would be harder to fill in future. This suggests some optimism that the significance of such recruitment bottlenecks is reducing slightly.

When this data is considered by sector, it shows that (see Figure 31 and Figure 32):

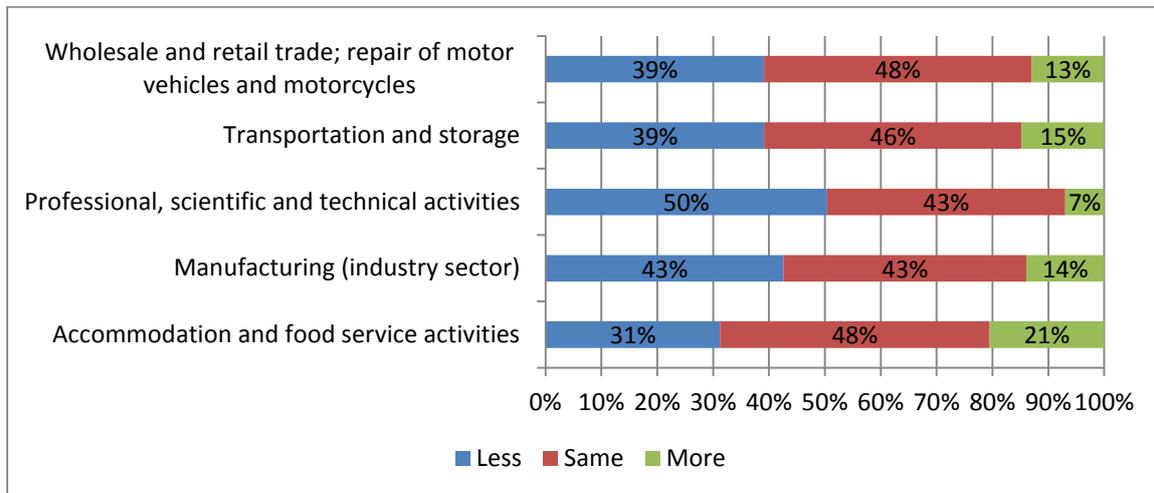
- In the Accommodation and food service and Manufacturing sectors, a higher share of employers than in other sectors believed that they had more difficulty two years ago than currently;
- In the Wholesale and retail trade sector, a higher share of employers than in other sectors believed it was less difficult two years ago than it is now;
- Substantially more employers with recruitment difficulties in the Professional, scientific and technical activities, Manufacturing, Wholesale and retail trade, and the Transportation and storage sectors believed they would have fewer difficulties in the future, and considerably more believed this would be the case in the Accommodation and food service activities sector;

Figure 31: Share of employers with recruitment difficulties who state that they experienced less, more or the same difficulties two years ago, by sector



Source: Interviews with employers, ICF International, 2015. Response to the question: How has the situation changed over time? Would you say that in the past two years filling vacancies for (job title) was generally less difficult or more difficult than today, or has the situation remained unchanged?

Figure 32: Share of employers with recruitment difficulties who state that they expect difficulties to become less, more or stay the same in the next two years, by sector



Source: Interviews with employers, ICF International, 2015. Response to the question: How do you expect this [recruitment situation] to change in the next two years?

Many employers explained their rationale for their assessment. The following were common reasons:

- English is likely to be a growing need which should be met while the need for other languages will decline. One interviewee in Malta, for example, stated that: "Many jobs require northern languages. There is much less interest in learning French, German / Spanish when you can get along in English. But I think in the future there will not be a huge need for other languages because English is the language of communication."¹³⁰
- Proficiency is increasing because of mobility especially among graduates who improve their language skills through learning and work in other countries. "Many candidates were in another country for several months during their high school time or during their studies. They can use foreign languages actively, not only passively." This is particularly the case with English because younger people's proficiency is perceived to have increased as result of the wider use of English in the media. "The young generation watches movies in English, they read in English and have international friends. For them it is common to speak in English".¹³¹
- Proficiency in languages other than English is not improving. Several employers reported that applicants' language proficiency is more and more limited to English. In some cases, this creates mismatches between the demand and supply of particular foreign languages which employers think should be addressed. "There is a great gap between the need and the supply [of Russian]. It [the need for Russian to replace Swedish in schools or in some schools] is clear when you see that the need increases and how little Russian is being studied."¹³²
- In some countries (e.g. BG and EE), the emigration of people with foreign language skills affects the supply of job applicants with foreign language skills.

¹³⁰ 3, Transportation and storage, Malta

¹³¹ Employer association, Professional, scientific and technical activities, Germany

¹³² 25, Manufacturing, Finland

4.9.4 Summary

One third of employers experience difficulties in filling positions as a result of a lack of applicants' foreign language skills. Two thirds of these difficulties are due to insufficient foreign language levels of job applicants, one third is due to the inability of finding suitable candidates with proficiency in a particular language. The assessment of trends in difficulties substantially varies across sectors with the share of employers expecting more difficulties in the future being greatest in the Accommodation and food services sector. Employers in the Professional sector were much more optimistic. Common reasons put forward by employers to explain their views were the growing proficiency of young people in English (but not other foreign languages) and increasing mobility (providing native speakers to some countries to meet foreign language needs while taking foreign language speakers from others).

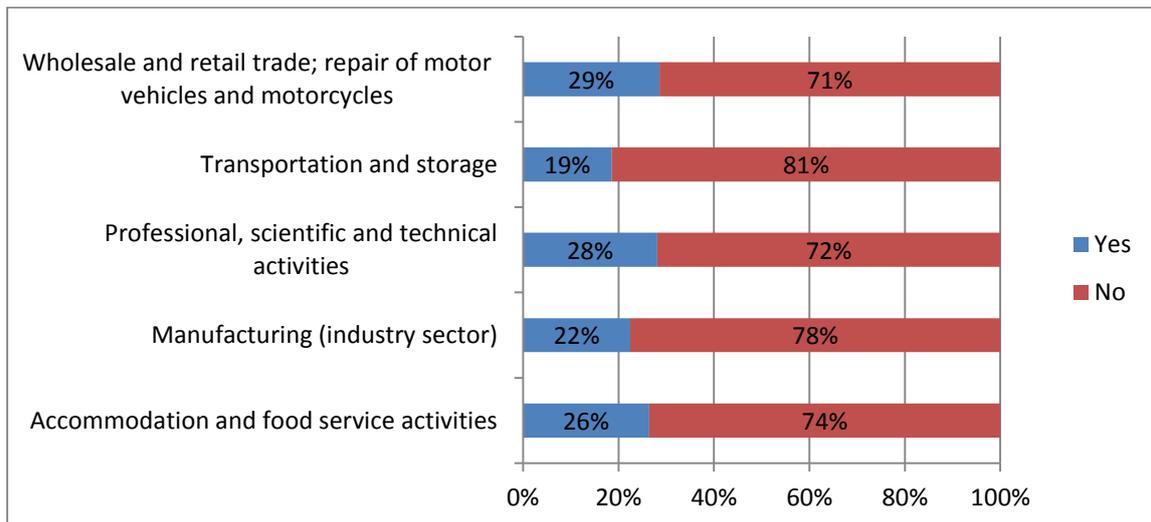
4.10 The extent to which languages generate competitive advantage for businesses

In this section there is an analysis of whether employers believe that they gain a competitive advantage as a result of their foreign language skills and whether this mainly results in better performance in the domestic market, in foreign markets, or both.

4.10.1 The extent of competitive advantage from foreign language skills

Most employers do not believe that their competitors currently have a comparative advantage because of their stock of language skills. This was stated by three quarters of all employers. In no sector did more than a third of employers state that they felt their competitors had a comparative advantage as a result of their stock of language skills, as shown in Figure 33. This may be explained by the fact that employers consider that their competitors face the same constraints as they do. This is a rational explanation given that they are operating within the same labour market.

Figure 33: Share of employers who believe that competitors' foreign language skills generate competitive advantage, by sector



Source: Interviews with employers, ICF International, 2015. Response to the question: Do you feel your competitors have an advantage because of their foreign language skills?

There is some variance between countries. In a few countries (CZ, DE, LV, RO) a small majority of employers believed their competitors did have a comparative advantage as a result of their stock of language skills while in others all, or almost all, did not believe that their competitors had any comparative advantage (AT, DK, PL).

There were no common differences found related to career stages, educational requirements or business size. One employer in Belgium (Wallonia) stated that, "Our two biggest competitors have an advantage because of their foreign language skills."

They have fewer issues to find candidates with foreign language skills as they are known brands.”¹³³ This might indicate that less well known companies, and perhaps even smaller companies may struggle to attract sufficient language skills in tight labour markets though this did not emerge from other interviews.

4.10.2 The markets in which competitive advantage is gained through language proficiency

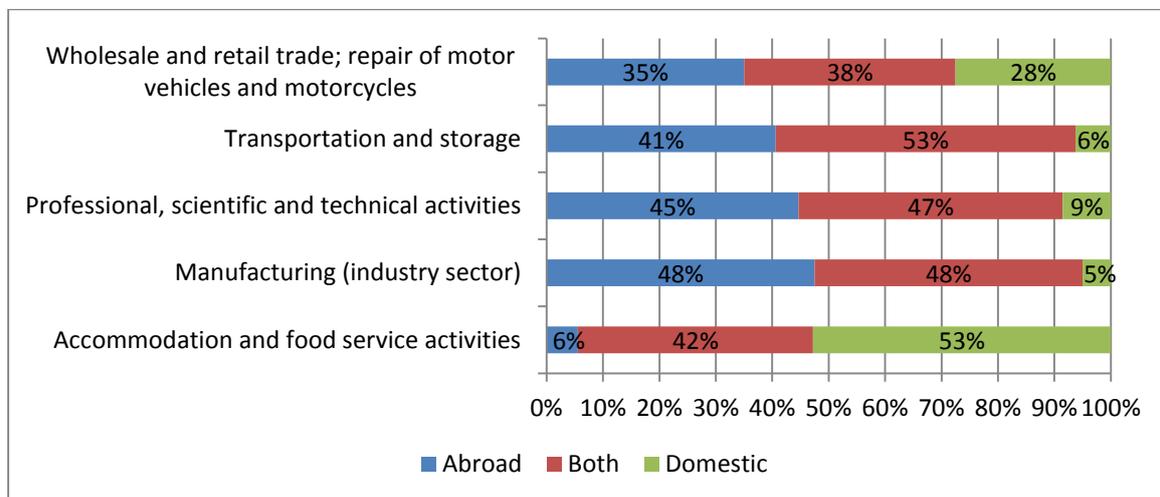
“To be successful, you have to speak the language of the market. The market will not speak our language”.¹³⁴

Of those employers who believe that competitors have an advantage as a result of their foreign language skills, most indicate that this advantage comes from performance in foreign markets. This is certainly the case for employers in the Manufacturing, Professional, scientific and technical activities, and Transportation and storage sectors as shown in Figure 34.

In contrast, more employers in the Accommodation and food service sector stated that there is an advantage from language skills in their domestic markets, for example in Czech Republic one employer stated that: “The hotel [with foreign language skills] received significant amount of positive commentaries on booking portals from guests due to good language proficiency of its employees”¹³⁵.

In Luxembourg, one employer in the same sector stated that “We are at an advantage because we pay close attention to ensuring that our employees master three languages well. Most hotels require their staff to speak only French and English. But we are closer to the German border, so we also have German-speaking staff.”¹³⁶

Figure 34: Markets in which competitive advantage is gained through language proficiency



Note: Percentages based on answers of employers who see competitive advantage of competitors as a result of their foreign language skills. Employers who see no competitive advantage are excluded. Source: Interviews with employers, ICF International, 2015. Response to the question: Is this advantage [of competitors] most apparent in the domestic market or for business abroad?

Interviewees’ responses indicate that what is of value is not language proficiency alone, but the cultural knowledge that this often brings:

¹³³ 9, Wholesale and retail trade, Belgium (Wallonia)

¹³⁴ 2, Transportation and storage, Germany

¹³⁵ 12, Accommodation and food service activities, Czech Republic

¹³⁶ 1, Accommodation and food service activities, Luxembourg

"Yes, it is very possible [that some competitor has the advantage]. The language skills have started to mean competitive advantage, especially in Russian markets. There is a lot of bureaucracy and paperwork. You have to have cultural knowledge, fluent language skills and extremely good customer handling skills. The farther you go to more exotic countries the more you benefit from knowing local circumstances."¹³⁷

4.10.3 Summary

About one quarter of employers feel that their competitors have a competitive advantage because of their stock of foreign language skills, with some variation across sectors. The sector in which employers believe their competitiveness is least affected by the stock of foreign language skills of competitors is the Manufacturing sector (one fifth of employers).

The market in which competitive advantage is gained through language proficiency differs across sectors. While this is clearly the domestic market in the Accommodation and food service activities sector, it is foreign markets which are affected by competitors stock of foreign language skills in the Transportation and storage, Professional, scientific and technical activities and Manufacturing sectors. In the Wholesale and retail trade sector both markets appear to be equally affected. Competitive advantage may come from cultural knowledge as well as language skills.

4.11 The comparative advantage of individuals with foreign language proficiency

This section looks at the comparative advantage of having foreign language skills for job seekers and workers who want to progress in their careers. The section begins with presenting the evidence collected during the employer interviews on the importance of foreign language proficiency in the recruitment process and the significance of foreign language skills when all other recruitment criteria are met. The section concludes with a synthesis on the role of foreign language proficiency for employability.

4.11.1 The importance of foreign language proficiency in the recruitment process

Around half of the employers interviewed for this study stated that language proficiency is very important (Table 8). Of the remainder, just less than a third stated that it was important, with few stating that it was of little importance or unimportant. There were some small differences when this data is considered by sector. The sectors with the greatest share of employers stating that language proficiency was very important were the Transportation and storage and the Professional, scientific and technical activities. Less than half of those in the Accommodation and food service activities; Manufacturing; and, Wholesale and retail trade sectors stated that language proficiency was very important.

Table 8: Importance of foreign language proficiency for recruitment, by sector

Sector	Unimportant	Of little importance	Moderately important	Important	Very important
Accommodation and food service activities	0%	5%	23%	25%	47%
Manufacturing (industry sector)	2%	3%	13%	35%	48%
Professional, scientific and technical activities	2%	6%	16%	19%	57%

¹³⁷ 1, Transportation and storage, Finland

Sector	Unimportant	Of little importance	Moderately important	Important	Very important
Transportation and storage	2%	4%	12%	30%	51%
Wholesale and retail trade; repair of motor vehicles and motorcycles	2%	6%	16%	36%	40%
Grand Total	2%	5%	16%	29%	49%

Source: Interviews with employers, ICF International, 2015. Response to the question: How important is knowledge of a foreign language for persons applying for a position as [job title] to get the job? Is it unimportant, of little importance, moderately important, important, very important? NOTE: figures may not sum due to rounding.

When the data is analysed by country (not shown here) there are some significant differences between the levels of importance attributed to language skills required by applicants for new jobs.

- In five countries, almost all employers stated that language skills were very important or important issues in the recruitment process (BE-fr, CZ, DK, PT, SI);
- In ten countries, more than three quarters of employers (but not almost all) stated that language skills were either very important or important when recruiting (AT, BE-nl, CY, EE, EL, ES, IT, LT, LU, MT);
- In nine countries this was between half and three quarters of employers (BG, DE, FI, HR, HU, LV, PL, RO, SE).

When the foreign language skills of applicants required to get the job are analysed by stage of career it is evident that most employers attribute greater significance to language skill requirements to those in the later stages of their career. As shown in Table 9, more than 6 out of 10 employers stated that for mid-career and later-career candidates language proficiency was very important, compared to fewer than half stating this for labour market entrants or those in their early career.

Table 9: Importance of foreign language proficiency for recruitment, by career stage

Career stage	Unimportant	Of little importance	Moderately important	Important	Very important
Labour market entrant (0-1 year of experience)	3%	7%	18%	32%	40%
Early career (2-5 years of experience)	1%	3%	17%	30%	50%
Mid career (6-15 years of experience)	1%	4%	10%	24%	61%
Later career (15< years of experience)	0%	13%	0%	25%	63%
Grand Total	1%	5%	16%	29%	49%

Source: Interviews with employers, ICF International, 2015. Response to the question: How important is knowledge of a foreign language for persons applying for a position as [job title] to get the job? Is it unimportant, of little importance, moderately important, important, very important?

Employers also attach a greater importance to language proficiency in positions requiring higher level qualifications although the difference is not large.

Table 10: Importance of foreign language proficiency for recruitment, by educational requirement

Educational requirement	Unimportant	Of little importance	Moderately important	Important	Very important
Higher education degree	0%	2%	12%	29%	57%
other	3%	9%	18%	29%	42%
Total	2%	5%	15%	29%	49%

Source: Interviews with employers, ICF International, 2015. Response to the question: How important is knowledge of a foreign language for persons applying for a position as [job title] to get the job? Is it unimportant, of little importance, moderately important, important, very important? NOTE: figures may not sum due to rounding.

There is little difference when the data on importance of language proficiency in the recruitment process is considered by business size (not shown here). The data suggest that language proficiency may be slightly less important for smaller sized businesses (with a higher share of small firms stating that language proficiency is unimportant or of little importance at recruitment stage than do medium or large firms).

4.11.2 Foreign language skills as a career driver

*"Language is a big asset. If you are able to speak several languages your career will not be the same."*¹³⁸

When asked whether foreign language skills are a career driver most employers will confirm that they indeed are.

4.11.3 Foreign language skills as a necessary condition to get and do the job

One apparent reason why foreign language skills are a career driver is that they allow candidates to apply for and get access to particular positions requiring them. As discussed in Section 3.1.2 the foreign language most often required is English:

*"Without a high level of English, they [applicants] will not have a chance at all."*¹³⁹

*"Foreign languages are a must and without them employment is not possible. So they definitely offer an advantage."*¹⁴⁰

Consequently, job seekers with foreign language proficiency have more options on the labour market and – all other things being equal – a higher chance of getting a job.

Even for positions for which foreign language skills are not essential they may give applicants the decisive advantage as employers consider them a desirable extra:

*"Even if we do not require English skills, at the end of the application process, they can make the difference why someone will get the job."*¹⁴¹

*"I speak Greek, English, Italian and Spanish. When I applied for the role in HR in this company, I don't think they hired me just for the languages but I suspect it helped a bit as by the nature of the business we would have to recruit a lot of staff with languages. So I am an example of how languages can help with your career."*¹⁴²

While foreign language skills play a gatekeeping role for many jobs in the sectors examined in this study, employers clearly emphasise that language skills alone are not sufficient to get a job.

*"It helps, but it's not enough"*¹⁴³

¹³⁸ Professional, scientific and technical activities, Luxembourg

¹³⁹ 14, Manufacturing, Germany

¹⁴⁰ 25, Professional, scientific and technical activities, Lithuania

¹⁴¹ 9, Manufacturing, Germany

¹⁴² 1, Professional, scientific and technical activities, Cyprus

¹⁴³ Employer organisation 1, Professional, scientific and technical activities, Poland

A point made by many employers is that foreign language skills are regarded as part of a package of basic skills that have to be embedded in specific professional skills in order to be a career driver. Other key professional skills, such as technical skills, sales and marketing skills, are regarded equally, if not more important, by employers:

"We have had employees who managed foreign languages perfectly, but who were mediocre at selling".¹⁴⁴

"Technical skills are more important than language skills. You could always hire an administrative assistant to help you out if you lack the language skills"¹⁴⁵

"Language skills are welcomed in positions of truck drivers and locomotive drivers but their health and mental endurance is more important than language skills."¹⁴⁶

Employers strongly depend on the supply of foreign language skills in the labour market and are forced to adjust, if necessary, their expectations:

"We did not find a sales manager to German markets in a recent search, and we have just decided to make a new job announcement with less emphasis on the technical expertise and more on the special sales abilities in the target country. We'll see how this turns out."¹⁴⁷

"It [the value of foreign language skills against other skills when recruiting] depends on the phase of the recruitment. This position [Strategic buyer] has been open for 1.5 months now. During the first three weeks we put great emphasis on being fluent in business English. By now, we are prepared to lower the bar and consider a medium level sufficient. But there needs to be a foundation to build on. We need to be confident that the candidate's proficiency in English can be improved [through internal trainings] to our required level. Only when this level is achieved will the person be able to fully take up the position."¹⁴⁸

4.11.4 The role of foreign language skills for career progression

While the interviews conducted strongly suggest that foreign language skills are in many cases a necessary condition for getting an attractive job in the sectors under investigation, evidence as to whether foreign language proficiency provides a comparative advantage for career progression is not as clear cut.

The competitive advantage foreign language skills provide for career progression is likely to depend on the general supply of foreign language skills in the workforce and in particular on foreign language proficiency of direct competitors for the job:

"95% of applicants fulfil our requirements of English language proficiency."¹⁴⁹

"English proficiency is not a career driver – it's considered a basic skill."¹⁵⁰

"All persons who apply for our positions have the required [foreign language] level as they were already forced to have these foreign language skills in order to get to where they are now."¹⁵¹

Employers did not provide hard evidence that foreign language skills – independent of other skills – are a career driver in terms of remuneration. However, employers suggest that individuals with foreign language skills may have higher salary levels because foreign language skills have provided them with access to higher level jobs.

¹⁴⁴ 19, Wholesale and retail trade, Denmark

¹⁴⁵ Professional, scientific and technical activities, Luxembourg

¹⁴⁶ Sector organisation, Transportation and Storage, Slovakia

¹⁴⁷ 19, Manufacturing, Finland

¹⁴⁸ 9, Manufacturing, Austria

¹⁴⁹ 9, Manufacturing, Germany

¹⁵⁰ Employers' association, Manufacturing, Sweden

¹⁵¹ 10, Manufacturing, Austria

In line with this, many employers state that foreign language proficiency is one of the determinants of career progress, in particular in relation to filling managerial positions:

*"Those who are aiming to [...] management positions should invest in their language skills already early. [...] The career path should be systematically built. Language skills are part of that development."*¹⁵²

Higher level jobs in general and management positions in particular demand a more sophisticated command of foreign languages than lower level, entry jobs as contact with clients, distributors, customers and sellers from foreign countries intensifies, tasks become more complex, and responsibilities increase. This is corroborated by Figure 8 and Figure 9 which suggest that mid-career jobs (6-15 years of work experience) require a higher level of foreign language proficiency than early career positions and that the importance of foreign language skills in the recruitment process also increases with the job level (i.e. required work experience).

Apart from being a prerequisite for certain higher level jobs, foreign language skills may also play a mediating role, enabling individuals to gather certain kinds of relevant experience (e.g. experience of working and living abroad) or making contact with relevant persons or partners:

*"Employees that climb the career ladder are those that can manage different situations, make useful contacts with partners, etc. which in part is due to knowing a foreign language. However, there is no direct link between language proficiency and gaining a promotion"*¹⁵³ Again, it needs to be emphasised that foreign language skills alone will not facilitate career advancement without additional expertise and experience in management and leadership.

4.11.5 Summary

Most employers interviewed stated that foreign language skills are either important or very important in the recruitment process with only minor differences between sectors and the size of business. The importance of languages for recruitment tends to increase with the job level (i.e. work experience and educational attainment required).

There is clear evidence that foreign language skills are a career driver – if they form part of a broader package of relevant (specific) skills. In combination with the right educational background and relevant work experience, foreign language skills provide access to jobs in international trade and services for which they are a prerequisite. There is also evidence, although not as clear cut, that foreign language proficiency facilitates career progression.

¹⁵² 26, Manufacturing, Finland

¹⁵³ 23, Accommodation and food service activities, Lithuania

5 BUSINESS NEEDS FOR FOREIGN LANGUAGE SKILLS AND HOW THEY ARE EXPRESSED IN ONLINE VACANCY NOTICES

This section presents data from an analysis of online vacancy notices placed in Member States between 15 August and 15 September 2015. It presents the findings using the same structure as Section 4 on the findings of the interviews with employers and employer organisations. The extent to which the findings support or challenge the findings from the interviews with employers and employer organisations is discussed in Section 7.

5.1 Which are the most useful languages?

The most useful languages are presented in this section through data analysis by sector; career stage; required qualification level; and, stated purpose of the language required in the job vacancy. These factors are each presented below.

5.1.1 Most useful foreign language

Overall, the five most important foreign languages according to the unweighted data from the online vacancy database review were English, German, Russian, French and Dutch. When weighting responses according to the scale of sector employment in countries the same languages remain in the Top 5. According to both weighted and unweighted data, the Top 5 languages are closely followed by Italian and Spanish, as shown in Table 11.

Table 11: Importance of foreign languages, unweighted and weighted online vacancy database review data

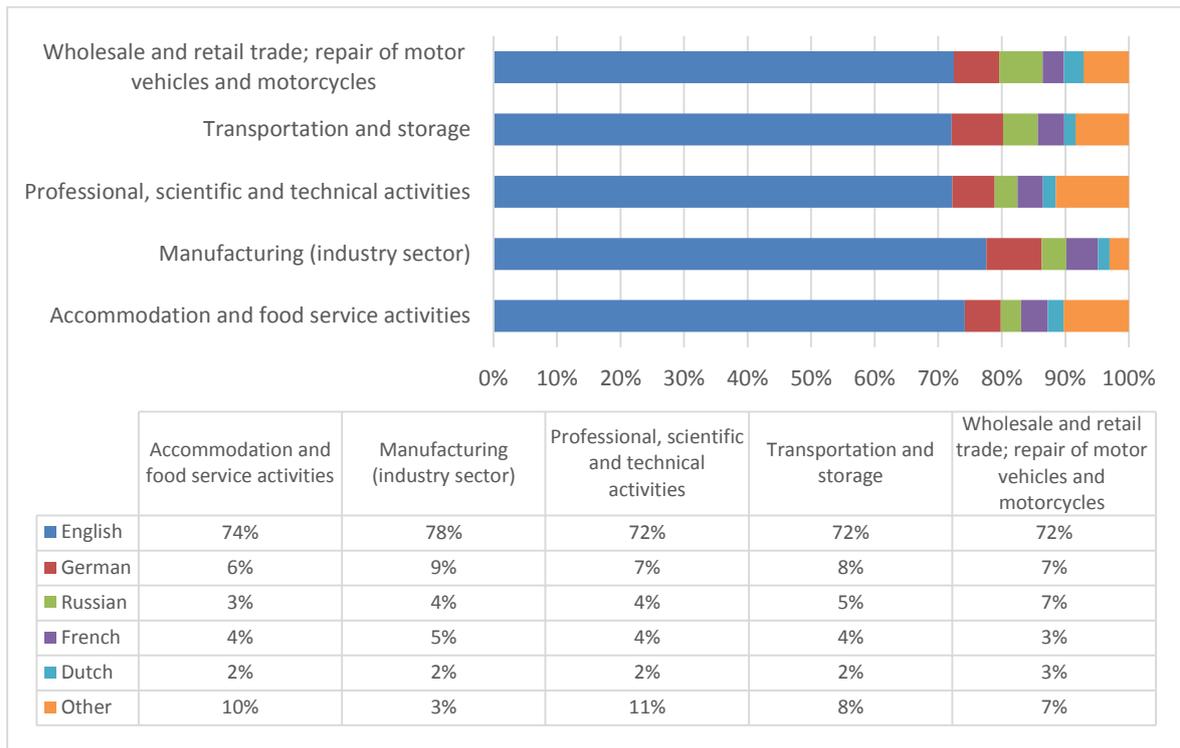
Most useful foreign language	Share (in %) unweighted data	Ranking unweighted data	Share (in %) weighted data	Ranking weighted data
English	74	1	72	1
German	7	2	7	2
Russian	5	3	2	5
French	4	4	7	3
Dutch	2	5	2	4
Italian	1	6	1	6
Spanish	1	7	1	7
Other	6		7	

Note: Weights are based on Eurostat table [lfsq_epgan2] and weight observations according to the employment size of the sector in a country in relation to EU total employment in that sector.

The analysis of vacancy data indicates that English is the most important foreign language in each of the sectors included in the study. This was the case in all sectors for around three quarters of advertised vacancies, with the highest share of vacancies in the Manufacturing sector requiring English. Of the other languages required as part of the analysis of vacancies, German was the next most requested, close to one in ten vacancies in the Manufacturing sector requested this language.

Few vacancies required other languages. Exceptions are the Accommodation and food service activities and the Professional, scientific and technical activities sectors where a higher share of other languages were evident in advertised vacancies. This includes a wider spread of EU languages and some non-EU languages than in the other sectors. These data are presented below in Figure 35.

Figure 35: Most useful foreign language, by sector



Source: Online vacancy database review, ICF International, 2015.

Figure 36 presents analysis of the usefulness of foreign languages by country from the review of vacancy databases. These data show that in all countries English is the most useful language. This ranges from around three quarters of all vacancies stating that English is the most important language to almost all of vacancies stating this.

In bilingual countries or countries with large minorities, one of the countries' languages rather than English appears to be the most important foreign language.¹⁵⁴ Omitting these countries¹⁵⁵ from the analysis leads to the replacement of Dutch by Italian as the fifth most often stated most important foreign language at the EU 28 level.

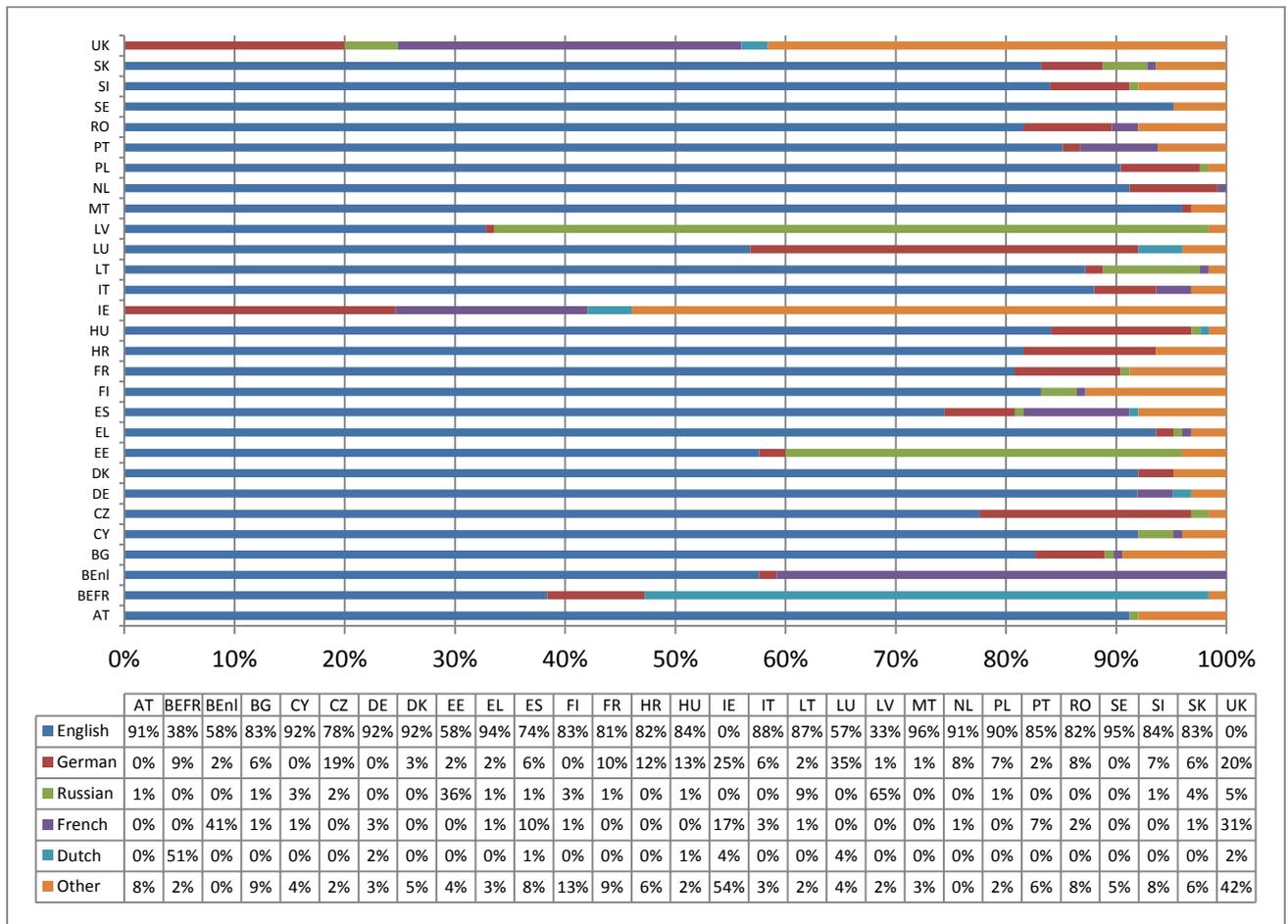
There are some minor differences between countries, for example:

- German is notably more important in Czech Republic than in other countries, with around a fifth of vacancies stating this as the most important language;
- Among the countries without a large Russian speaking minority, Russian appears far more important in Lithuania than it does in other countries analysed; and,
- The importance of French in both Spain and Portugal.

¹⁵⁴ Country researchers were asked not to consider vacancy notices requiring a foreign language for domestic purposes only. In bilingual countries or countries with large minorities, a clear differentiation was, however, difficult as the foreign language is both important for domestic purposes and trade (e.g. Russian in Estonia and Latvia, French in Flanders, German for French-speaking companies in Luxembourg, etc.).

¹⁵⁵ BEfr, BEnl, EE, LU, LV

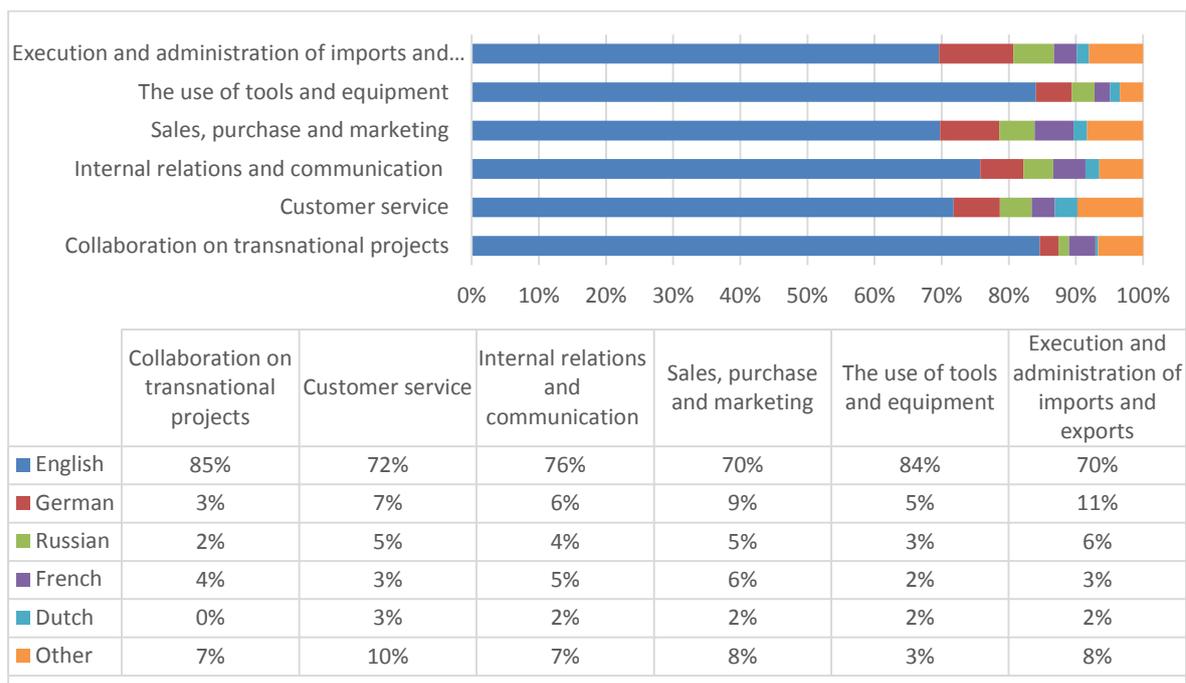
Figure 36: Most useful foreign language by country



Source: Online vacancy database review, ICF International, 2015.

The most useful foreign languages by stated purpose of the advertised role is presented below in Figure 37. These data present analysis which shows the following:

- For the purpose of collaboration on transnational projects the importance of English is stronger than for any other purpose, with French the next most useful language.
- For internal relations and communication English is the most useful language in around three quarters of online vacancy notices, a similar share to that for customer services.
- For the function of customer services ; sales, purchase and marketing; and execution and administration of imports and exports, German is more important than it appears to be for other purposes.

Figure 37: Most useful foreign language, by purpose


Source: Online vacancy database review, ICF International, 2015.

5.1.2 The second most useful foreign language

The most important second most useful foreign languages are similar for unweighted and weighted data, with the exception of Russian dropping out of the Top 5 and Spanish entering the Top 5 when weighting the data. This is shown in Table 12.

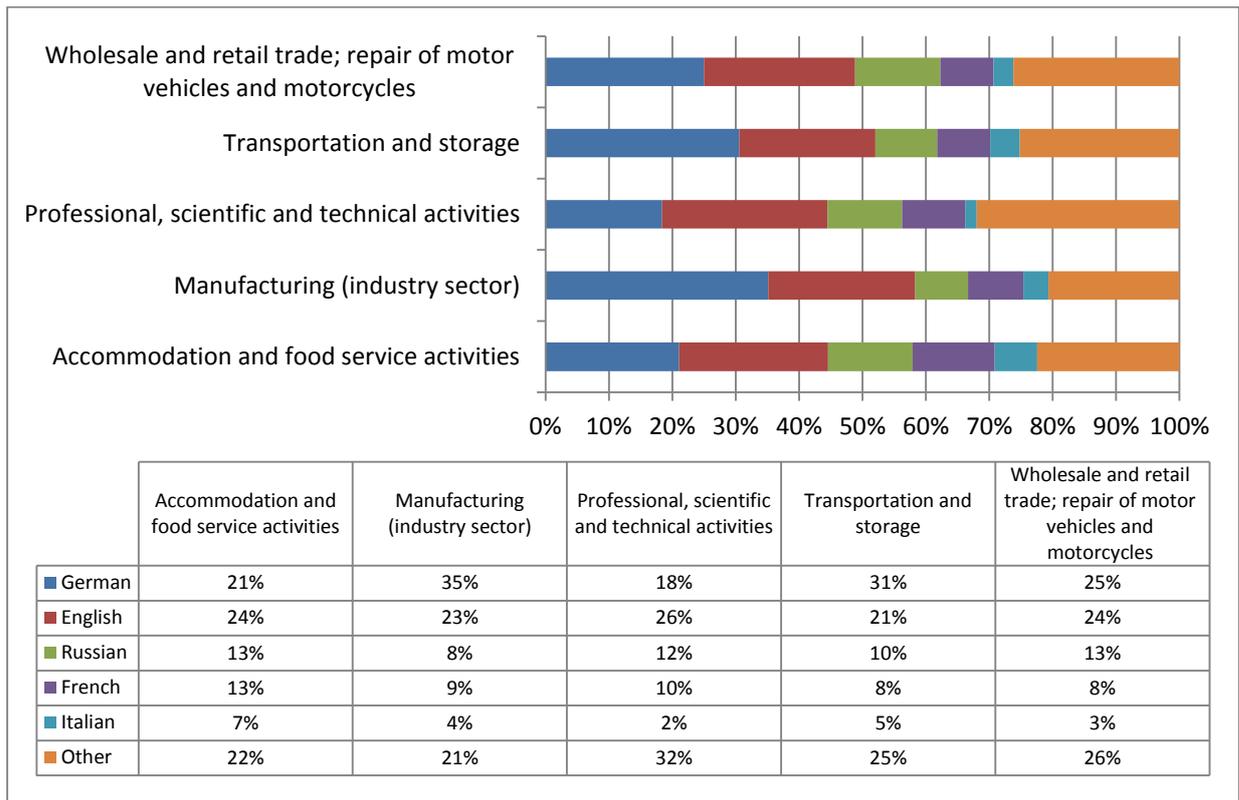
Table 12: Most important second most useful foreign languages, unweighted and weighted online vacancy database review data

Most useful foreign language	Share (in %) unweighted data	Ranking unweighted data	Share (in %) weighted data	Ranking weighted data
German	26	1	24	1
English	24	2	17	2
Russian	11	3	5	6
French	10	4	16	3
Italian	4	5	5	5
Spanish	4	6	5	4
Other	21		28	

Note: Weights are based on Eurostat table [lfsq_epgan2] and weight observations according to the employment size of the sector in a country in relation to EU total employment in that sector.

Figure 38 presents the second most useful foreign languages by sector. The most apparent difference across sectors is the high importance of German as the second most useful foreign language in the Manufacturing sector and the Transportation and storage sector.

Figure 38: Second most useful foreign language, by sector

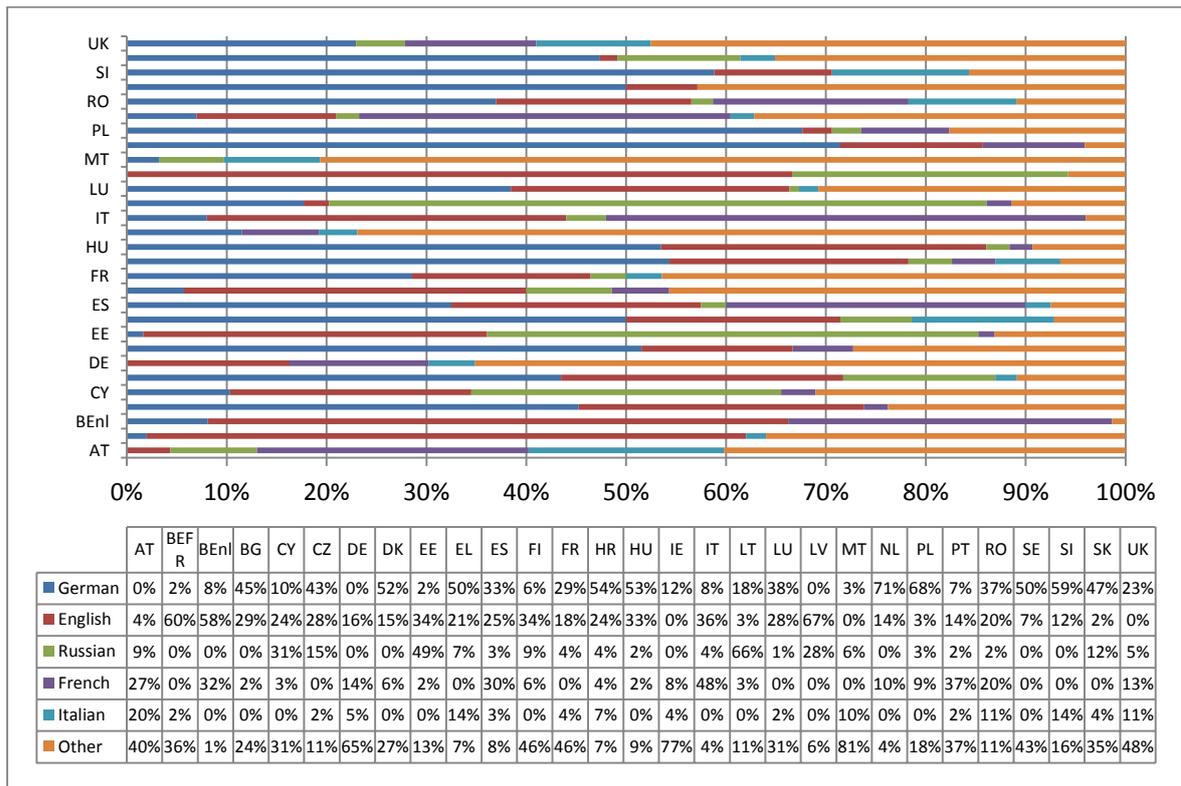


Source: Online vacancy database review, ICF International, 2015.

Considering the second most useful foreign language by country, as shown in Figure 39, the following is apparent:

- The language considered second most useful by employers is often the language of a neighbouring country. This is the case for the Czech Republic (DE), Denmark (DE), Estonia (RU), France (DE), Croatia (DE), Hungary (DE), Italy (FR), Lithuania (RU), The Netherlands (DE), Poland (DE), Slovenia (DE), Slovakia (DE), and Sweden (DE);
- Although not neighbouring countries, Bulgaria, Greece, Romania and Spain have a high demand for German; Cyprus has a high demand for Russian; and Portugal and Romania have high demand for French as the second most useful language.

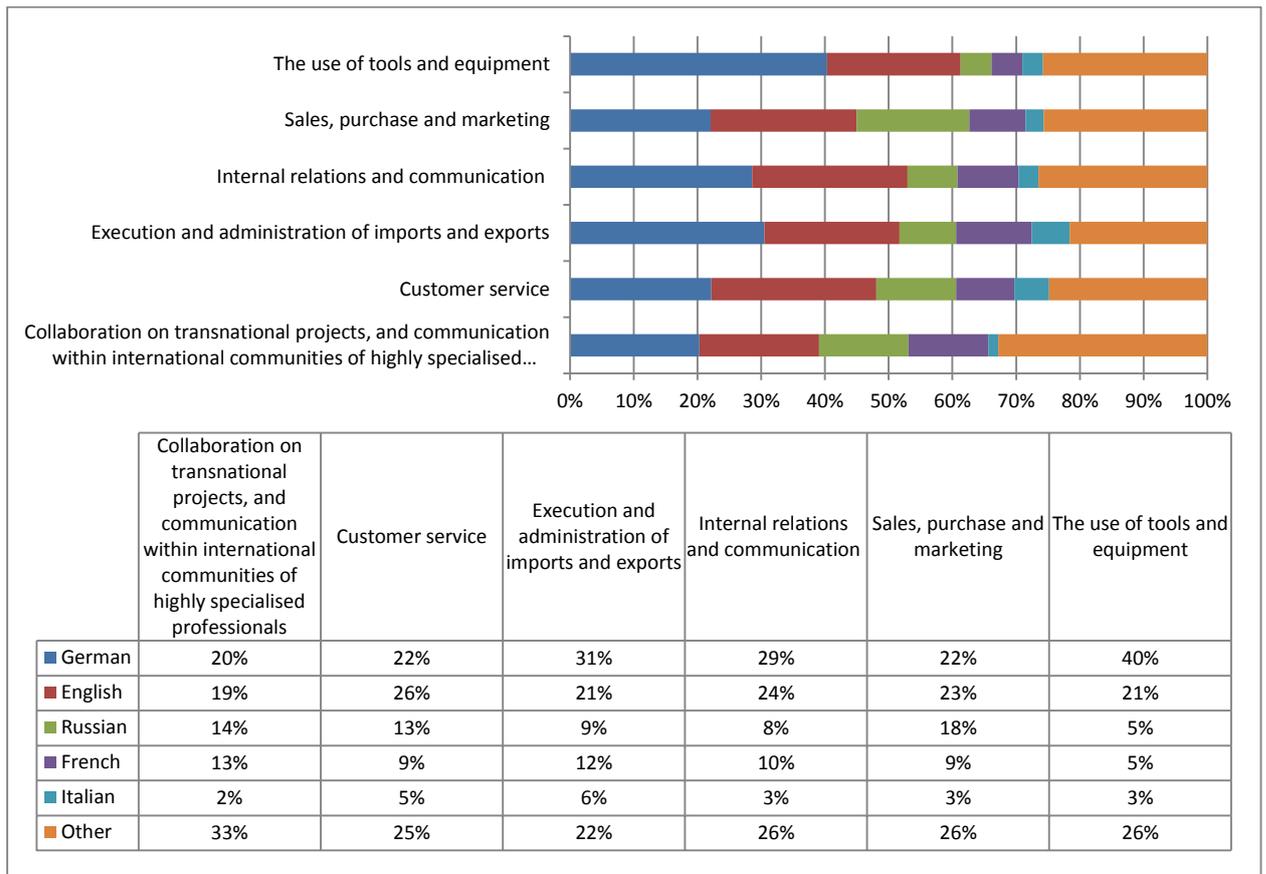
Figure 39: Second most useful language, by country



Source: Online vacancy database review, ICF International, 2015.

Figure 40 shows that German is particularly relevant as a second foreign language for jobs involving the use of tools and equipment, but also those jobs associated with the execution and administration of export and import activities. Both German and English play an obviously important role in relation to internal relations and communication in companies.

Figure 40: Second most useful foreign language, by purpose



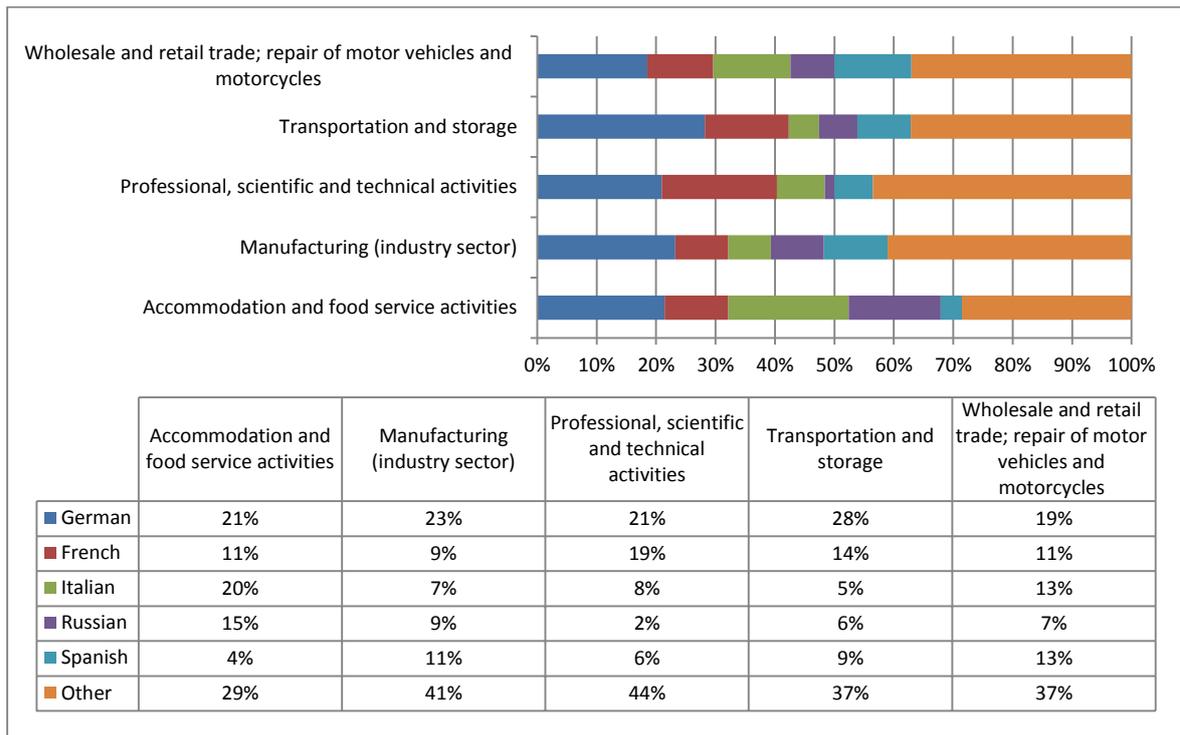
Source: Online vacancy database review, ICF International, 2015.

There are no meaningful relationships between the second most useful foreign language and work experience or the educational level required for the job.

5.1.3 The third most useful foreign language

Figure 41 presents the findings of the online vacancy database review with regard to the third most useful foreign language by sector. In contrast to the most and second most useful foreign languages, English does not rank among the Top 5, which is German, French, Italian, Russian and Spanish for the unweighted data, and German, French, Spanish, Italian and Russian for the weighted data.

Figure 41: Third most useful foreign language, by sector



Source: Online vacancy database review, ICF International, 2015.

5.1.4 Summary

This analysis supports the evidence from the interviews undertaken in Member States for this study. It is clear that English remains the most useful language in advertised job vacancies.

When the analysis is conducted by country it is clear that English is by far the most important foreign language in all the non-English speaking countries. Beneath this main finding there are some differences between countries regarding the next most useful foreign language. The analysis of the second most useful foreign language by country suggests that this is often the language of a neighbouring country or a country in close proximity.

A wider range of languages are important when the analysis is undertaken by purpose of the foreign language in the job. Here it is evident that in customer service roles and roles that require sales, purchase and marketing functions languages other than English become more important. This reflects the fact that functional market areas are an important driver of language utility. These functions require greater interaction with a wide range of external actors than other functions. As a result they require a wider range of languages.

Sectoral differences are most apparent for the second most useful language, showing the relatively higher importance of German in the Manufacturing and the Transportation and storage sectors.

With regard to the purpose of foreign languages, the analysis shows that German is particularly in demand as a second most useful foreign language in jobs involving operating tools and equipment. The data also suggests that both German and English seem to be often used for internal relations and communication.

5.2 What is the level of foreign language proficiency usually required/desired?

This section considers the required or desired level of language skills expressed in online vacancy notices. Analysis is undertaken by sector, level of work experience, educational requirement and the purpose of foreign language skills in the job.

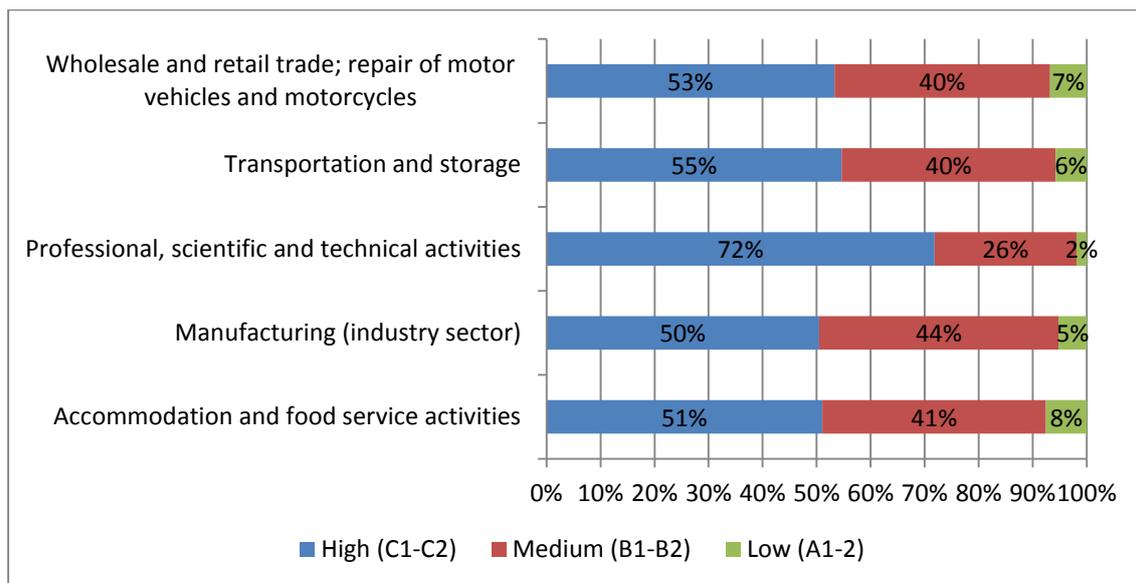
5.2.1 The level required by businesses for the most useful foreign language

For the most useful foreign language, 57% (56%) of employers ask applicants to have high oral (written) proficiency, 38% (36%) ask applicants to have medium level oral (written) proficiency, and the remaining 5% (8%) ask applicants to have low level oral (written) proficiency.

Figure 42 and Figure 43 indicate that there are differences in the levels and types of competences needed by different sectors:

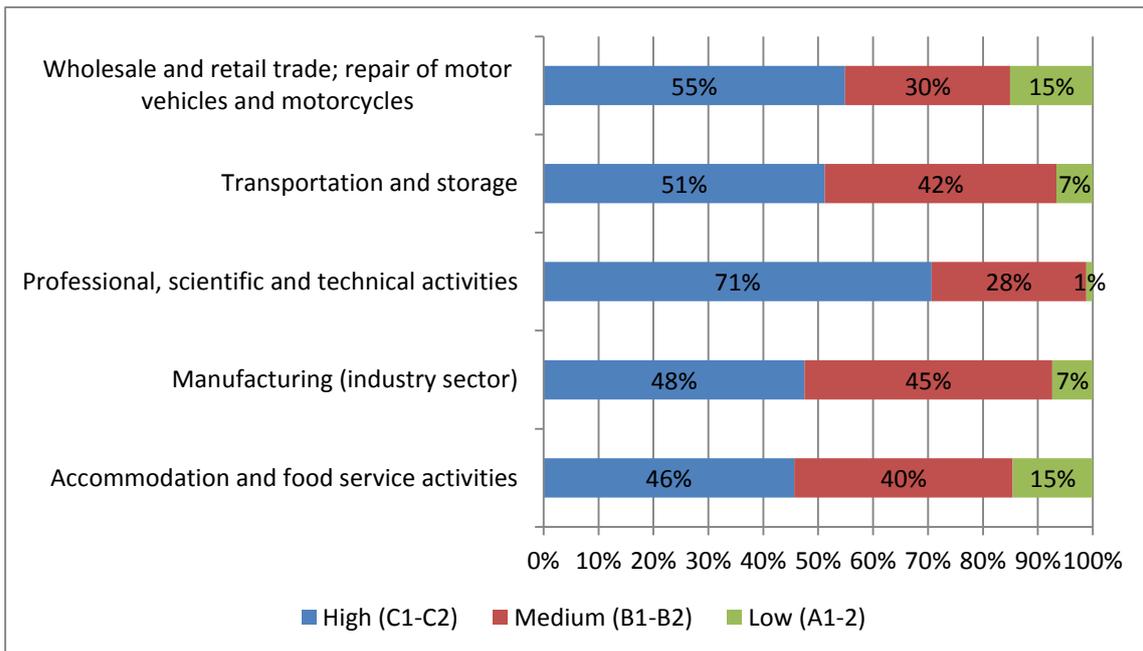
- Professional, scientific and technical activities sector employers demand higher skills in foreign languages than other sectors both written and oral;
- The data do not show large difference in the levels demanded among the other sectors, in particular for oral skills. For written skills, a high level is least demanded in the Accommodation and food services sector and the Manufacturing sector.

Figure 42: Demanded level of oral skills for the most useful foreign language, by sector



Source: Online vacancy database review, ICF International, 2015.

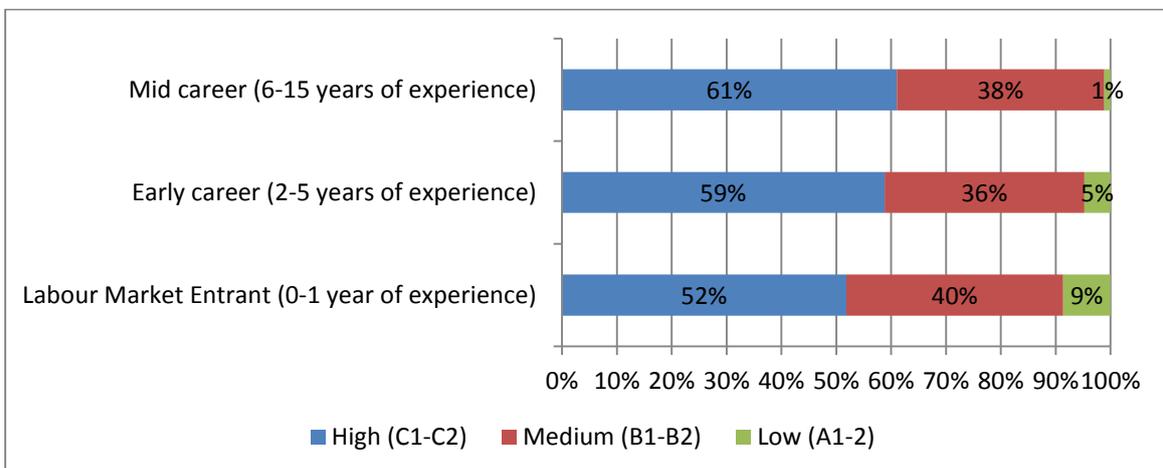
Figure 43: Demanded level of written skills for most useful foreign language, by sector



Source: Online vacancy database review, ICF International, 2015.

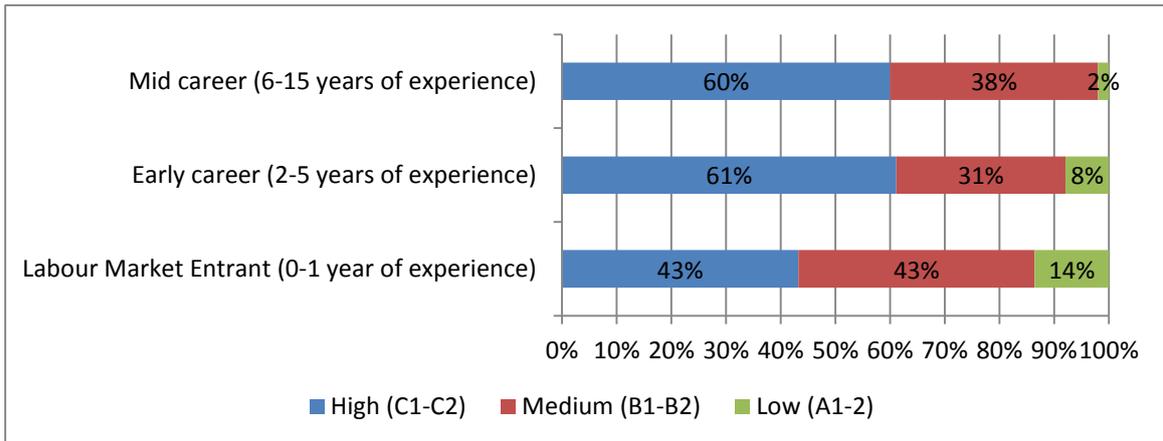
Figure 44 and Figure 45 indicate that the level of foreign language skills asked of labour market entrants (0-1 year of work experience) is lower than that of applicants for jobs requiring more work experience.

Figure 44: Demanded level of oral skills for most useful foreign language, by work experience



Source: Online vacancy database review, ICF International, 2015.

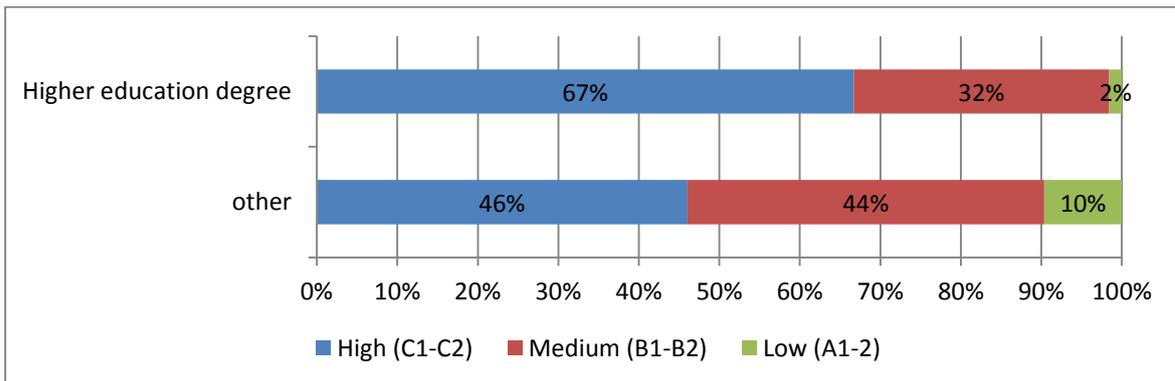
Figure 45: Demanded level of written skills for most useful foreign language, by work experience



Source: Online vacancy database review, ICF International, 2015.

Figure 46 and Figure 47 show that employers more often require a high foreign language level (C1-C2) when recruiting staff with a higher education degree than for staff with a lower qualification level although over four in ten require the highest level of oral and written¹⁵⁶ skills for non-degree level jobs.

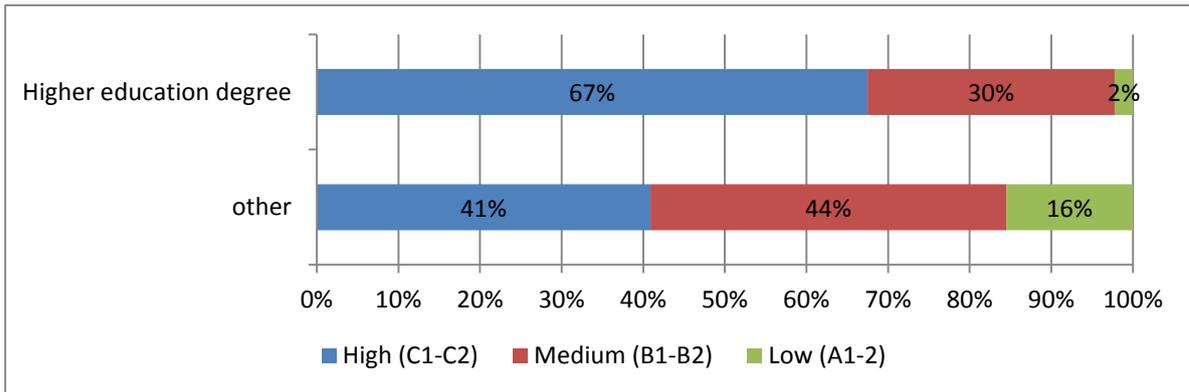
Figure 46: Demanded level of oral skills for most useful foreign language, by education level



Source: Online vacancy database review, ICF International, 2015.

¹⁵⁶ Only those explicitly specifying the level of written in vacancy notices, which may mean that written skills are particularly necessary for these jobs.

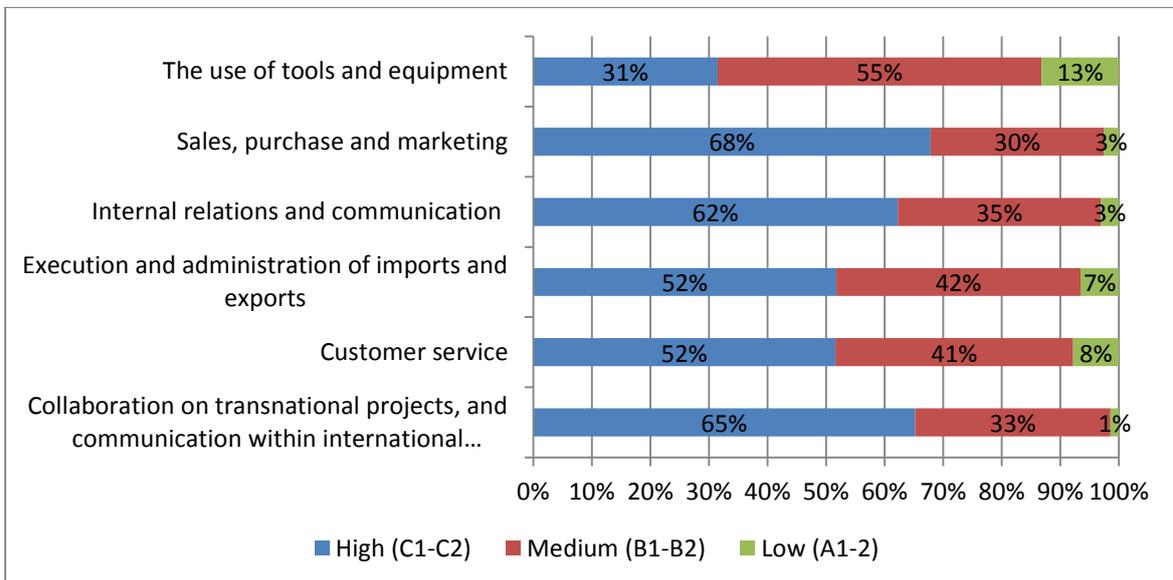
Figure 47: Demanded level of written skills for most useful foreign language, by education level



Source: Online vacancy database review, ICF International, 2015.

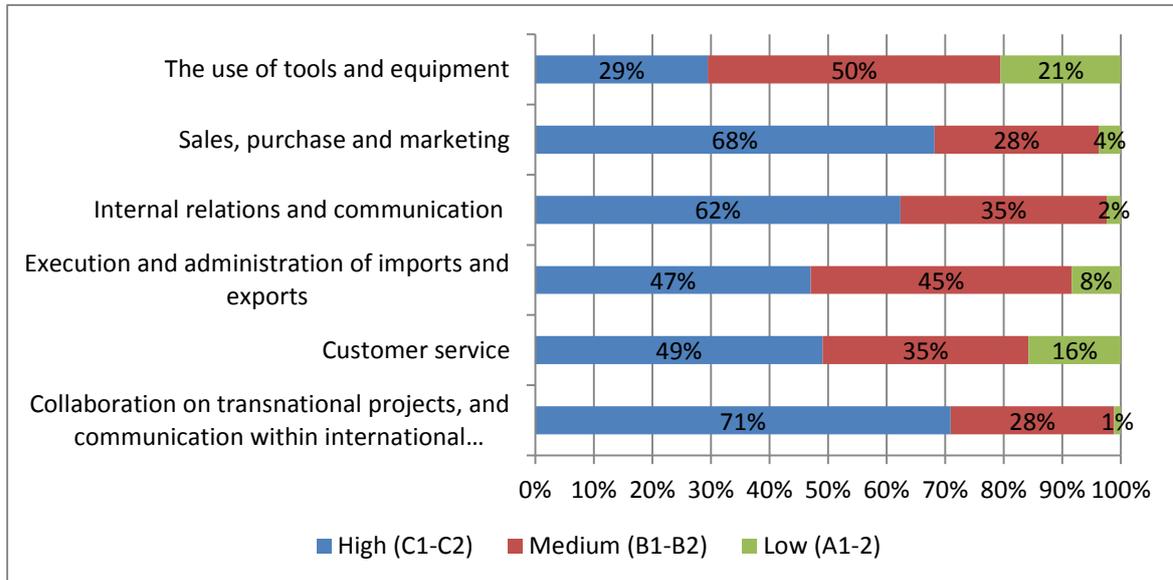
The job task descriptions collected from the vacancy notices allow analysis of how the required or desired foreign language proficiency relates to the purpose of foreign language skills in the job. Figure 48 and Figure 49 show that jobs associated with selling, purchasing and marketing products and services, jobs involving foreign language skills for communicating within the business and jobs requiring or desiring foreign language skills for working on transnational projects and communicating within communities of highly specialised professionals most often require high levels for both oral and written skills. Jobs involving the use of tools and equipment have the lowest need for foreign language proficiency, both in terms of the share of employers demanding a high level and the share of employers demanding a low level.

Figure 48: Demanded level of oral skills for most useful foreign language, by purpose of foreign language skills



Source: Online vacancy database review, ICF International, 2015.

Figure 49: Demanded level of written skills for most useful foreign language, by purpose of foreign language skills



Source: Online vacancy database review, ICF International, 2015.

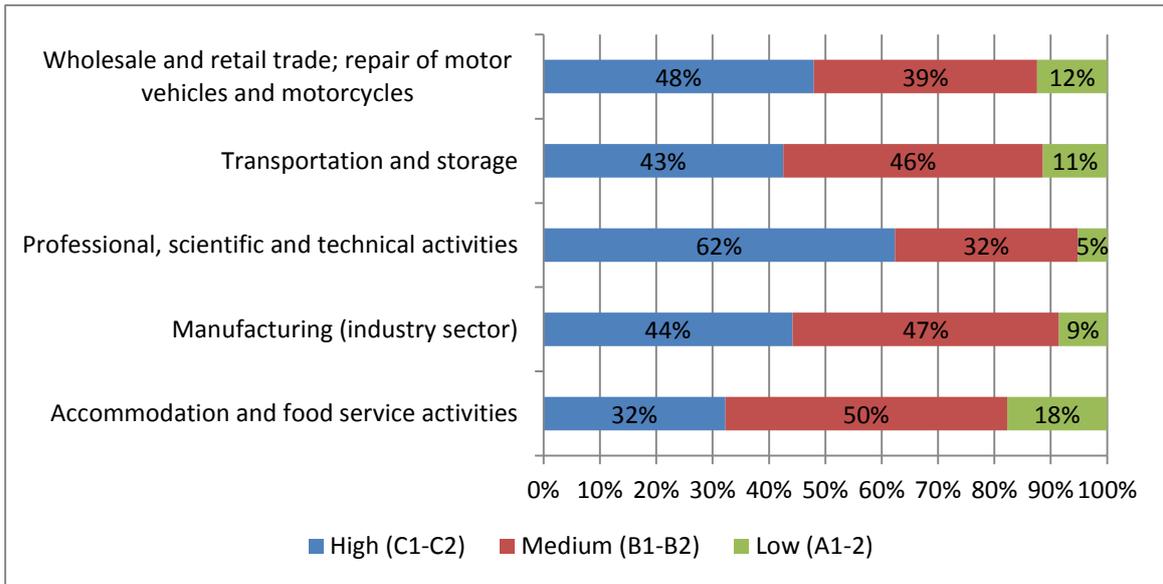
5.2.2 The level required by businesses for the second most useful foreign language

Over one third (1383) of employers requiring or desiring a foreign language in their vacancy notices also required or desired a second foreign language. For more than half (730) of vacancy notices it was possible to determine the level of skill required or desired, and about one quarter of these (199) explicitly specified the required/desired level of written skills.

The level of oral proficiency required for the second most useful foreign language is lower than for the most useful foreign language. In the vacancy notices analysed employers most often asked for high level skills (46%), followed by medium level skills (43%) and low level skills (11%). For written foreign language skills the same share of vacancy notices required high level skills (45%), fewer demanded medium level skills (37%) and more required only low level skills (18%).

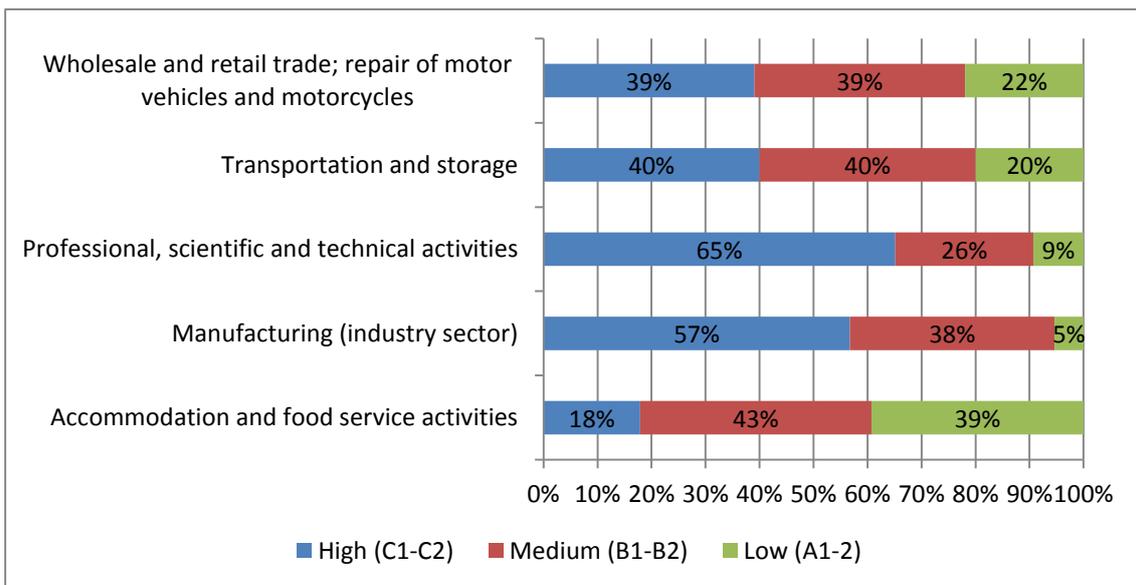
Employers in the Professional, scientific and technical activities sector again demand higher skills levels than other sectors though these are considerably lower than for the most useful foreign language. Employers in the Accommodation and food service sector also have markedly greater need for higher oral skills than written skills (see Figure 50 and Figure 51).

Figure 50: Demanded level of oral skills for second most useful foreign language, by sector



Source: Online vacancy database review, ICF International, 2015.

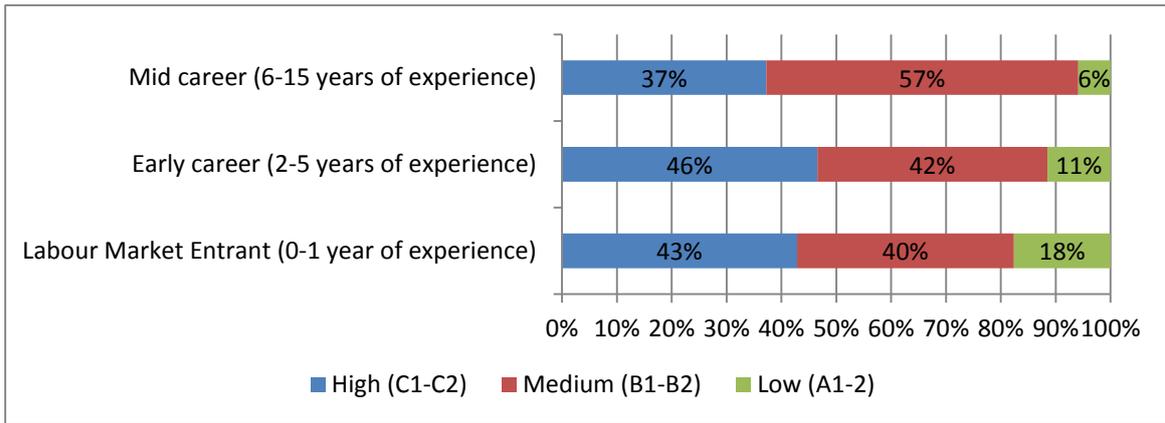
Figure 51: Demanded level of written skills for second most useful foreign language, by sector



Source: Online vacancy database review, ICF International, 2015.

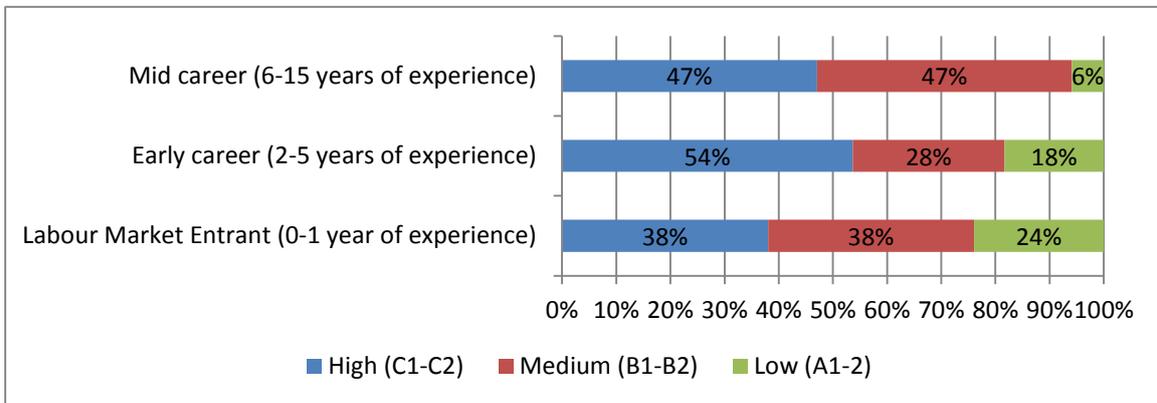
The data provides only weak evidence for a positive relationship between work experience and required language proficiency for the second most useful foreign language (Figure 52 and Figure 53). The share of jobs requiring a low level of both oral and written foreign language proficiency is highest for entry positions. Figure 54 and Figure 55 clearly show that employers demand higher foreign language levels when recruiting for positions for higher education graduates.

Figure 52: Demanded level of oral skills for second most useful foreign language, by work experience



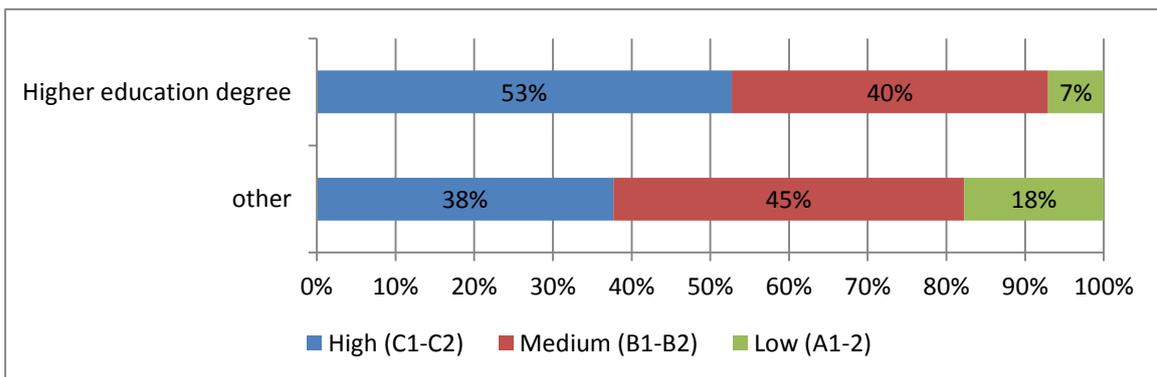
Source: Online vacancy database review, ICF International, 2015.

Figure 53: Demanded level of written skills for second most useful foreign language, by work experience



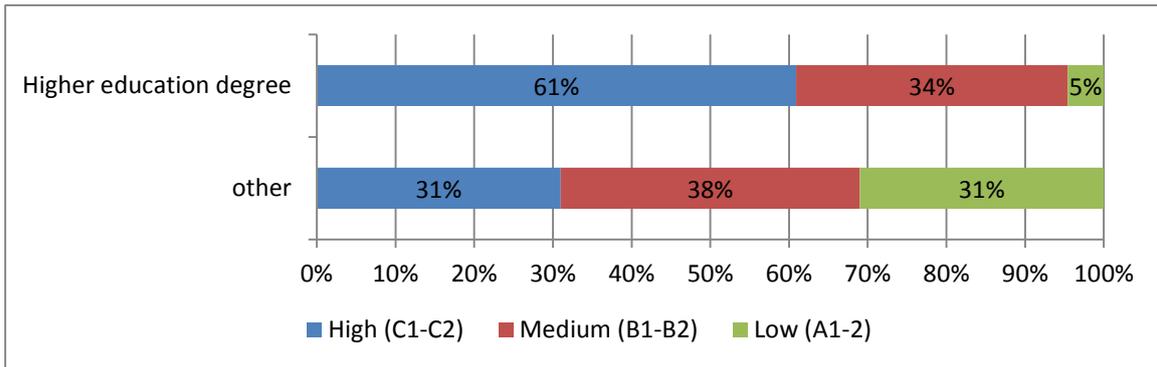
Source: Online vacancy database review, ICF International, 2015.

Figure 54: Demanded level of oral skills for second most useful foreign language, by education level



Source: Online vacancy database review, ICF International, 2015.

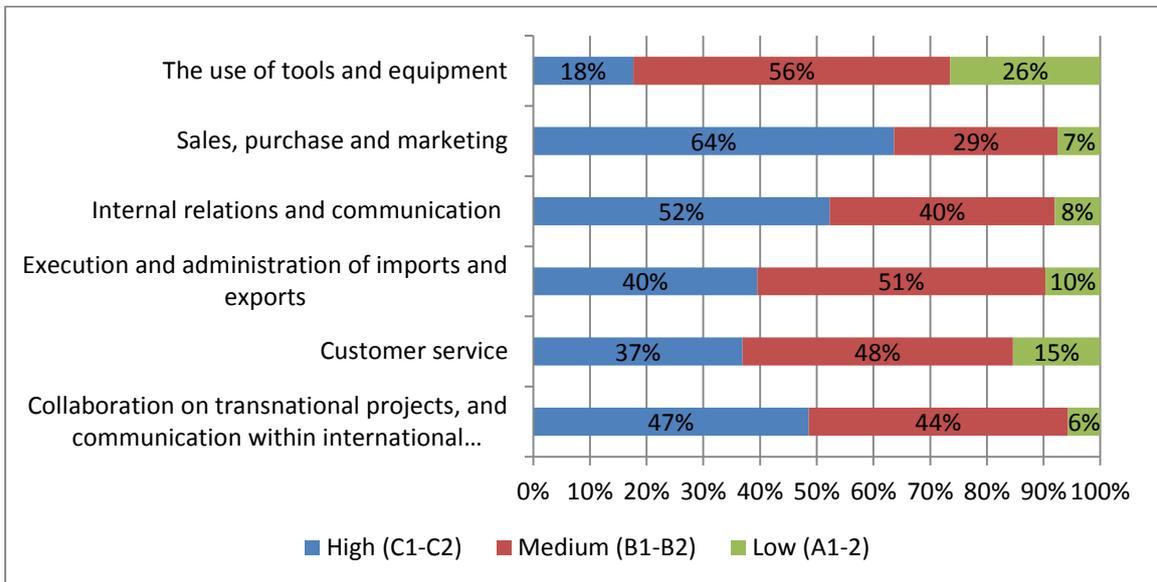
Figure 55: Demanded level of written skills for second most useful foreign language, by education level



Source: Online vacancy database review, ICF International, 2015.

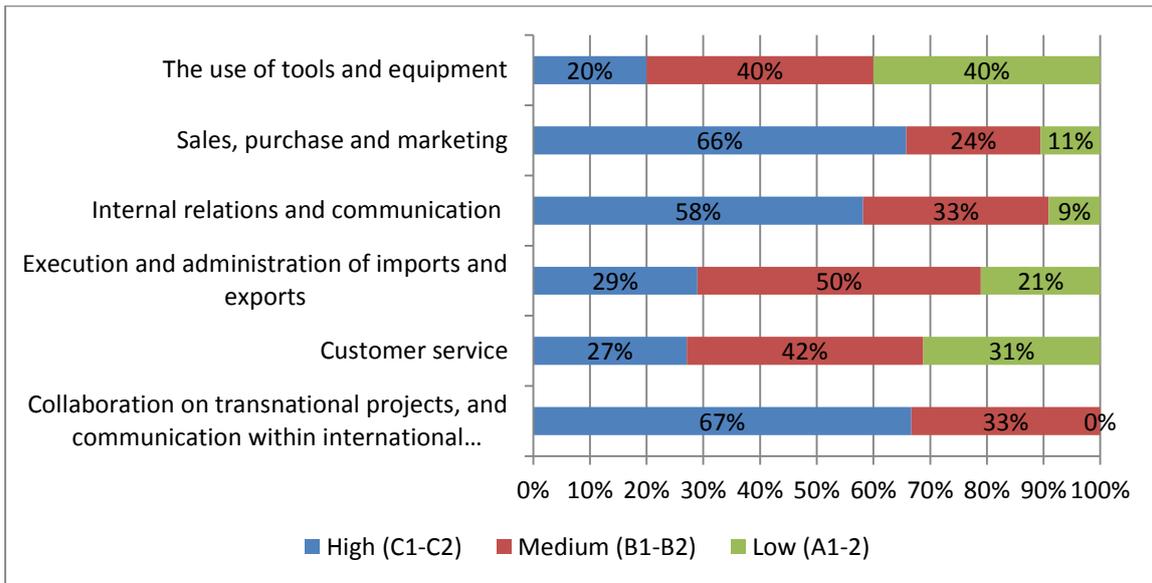
Looking at the purpose of foreign language skills in the job, demanded levels of both oral and written skills for the second most useful language are highest for sales, purchase and marketing positions, jobs requiring or desiring foreign language skills for internal relations and communications, and collaboration on transnational projects and communication within communities of highly specialised professionals (see Figure 56 and Figure 57). Remarkably, while more than two thirds of vacancy notices involving transnational projects and communication within communities of highly specialised professionals demanded a high level of proficiency for the most useful foreign language, this is less than half for the second most useful foreign language in the case of oral skills. For positions in sales, purchasing and marketing, and positions requiring or desiring foreign languages for internal relations and communication, the level demanded for the second most useful foreign language is lower to that of the most useful foreign language.

Figure 56: Demanded level of oral skills for second most useful foreign language, by purpose of foreign language skills



Source: Online vacancy database review, ICF International, 2015.

Figure 57: Demanded level of written skills for second most useful foreign language, by purpose of foreign language skills

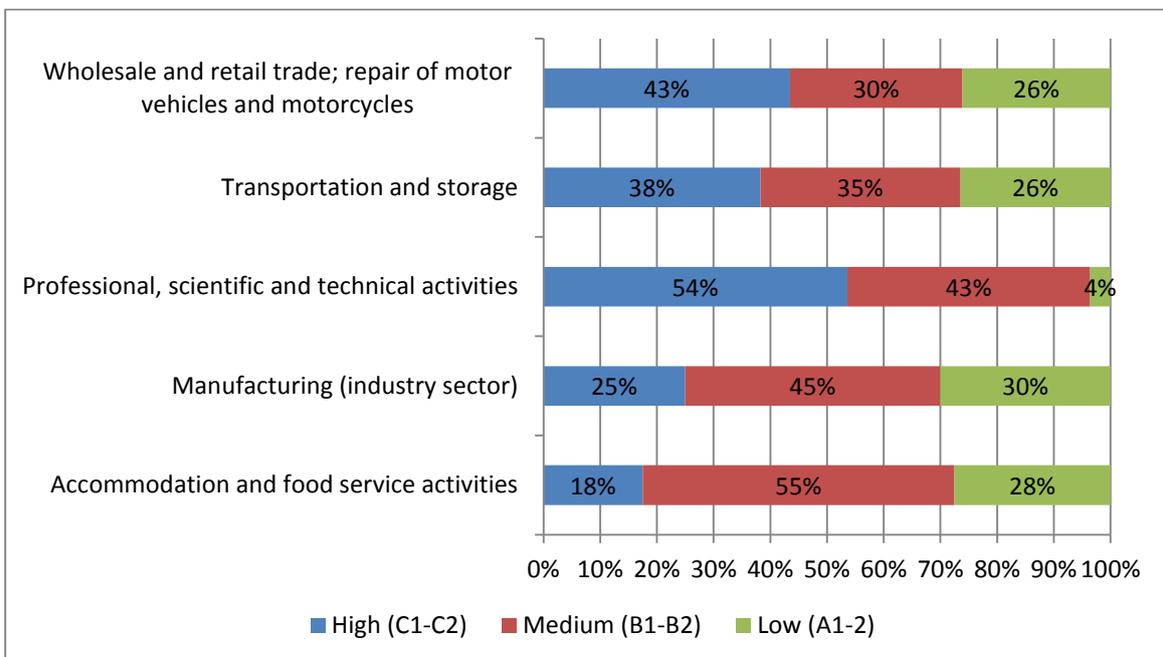


Source: Online vacancy database review, ICF International, 2015.

5.2.3 The level required by businesses for the third most useful foreign language

The level demanded for the third most useful foreign language is lower than for the most and the second most useful foreign languages. Of those vacancy notices which explicitly stated the level of the third useful foreign language required or desired for the job (158, 4%), 34% demanded a high level, 43% demanded a medium level and 23% demanded a low level of proficiency. Figure 58 shows the demanded level by sector.

Figure 58: Demanded level of oral skills for third most useful foreign language, by sector



Source: Online vacancy database review, ICF International, 2015.

More detailed analysis is not presented here because of the low number of observations.

5.2.4 Summary

The data collected shows that overall employers demand higher proficiency levels for those foreign languages most important to them.

For the most useful foreign language, vacancy notices most often ask applicants to have high (C1-C2) or medium level (B1-B2) foreign language proficiencies, enabling them to effectively communicate with native speakers, even if interaction is limited to familiar contexts. Jobs for labour market entrants (0-1 year of work experience) demand lower foreign language proficiency than jobs in later career stages, and later career stages do not differ with regard to the level of foreign language proficiency demanded. Jobs requiring a higher education degree tend to have higher foreign language requirements.

For both oral and written skills, foreign language requirements are highest in the professional, scientific and technical activities sector and in job roles involving the selling, purchasing and marketing of products and services, as well as in jobs using foreign languages for internal communication and jobs involving collaboration on transnational projects and communication within communities of highly specialised professionals. Jobs related to the execution and administration of imports and exports, and jobs in customer service significantly less often demand high levels of foreign language proficiency, for both oral and written skills, suggesting that in these job roles foreign languages are used much more often in routine contexts requiring medium or low foreign language skills. Jobs requiring foreign language skills for the use of tools and equipment clearly have the lowest foreign language requirements, indicating that foreign language use in these jobs is often basic and routine.

For the second most useful foreign language, vacancy notices again most often asked for high (C1-C2) or medium level skills (B1-B2), both in oral and written competences. However, more employers are content with a lower level of proficiency (A1-A2), enabling workers to transmit short and simple messages both orally and in writing. The positive relationship between the job level and the level of required foreign language skills found for the most useful foreign language is less clear for the second most useful foreign language. As for the most useful foreign language, the required level of proficiency is highest in the professional, scientific and technical activities sector.

Considering the second most useful foreign language by foreign language purpose, requirements are highest for jobs involving the selling, purchasing and marketing of products and services, jobs using foreign languages for internal communication and jobs involving the collaboration on transnational projects and communication within communities of highly specialised professionals. As for the most useful foreign language, demanded proficiency levels are lower for jobs in customer service and the execution and administration of imports and exports, and lowest in jobs demanding foreign languages for the use of tools and equipment.

For the third most useful foreign language, employers demand a lower level of foreign language proficiency than for the most and second most useful language, with a quarter of employers being content with a low level of foreign language skills.

5.3 Extent to which languages are required or desired by employers

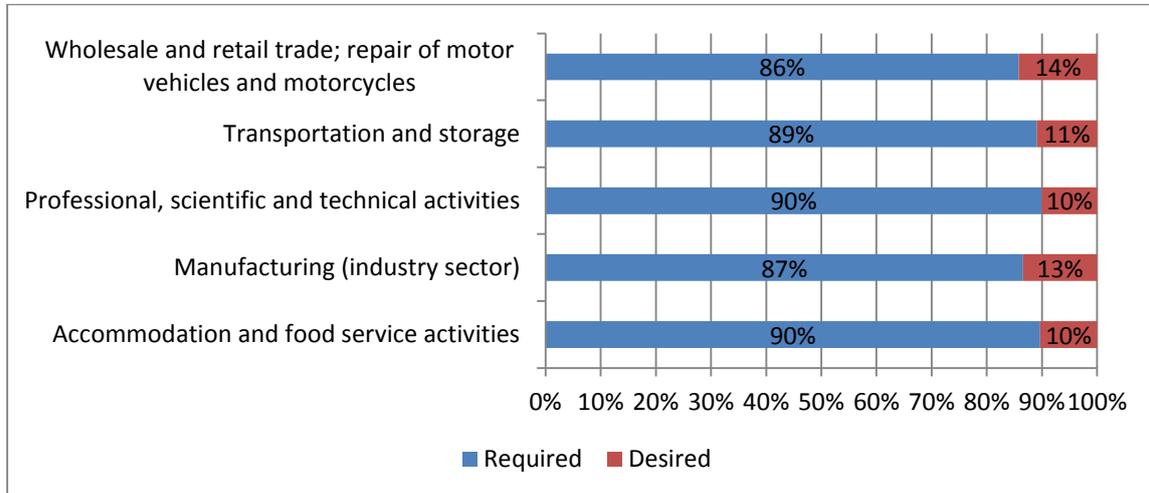
Vacancy notices often state whether the foreign language demanded is required from the candidate or rather a desired element. For instance, to indicate that the language skills are desired, the notices analysed often referred to them as an asset or an advantage, or indicated that those skills are valued.¹⁵⁷ When foreign language skills were required this was usually obvious from the expressions used in the notice.¹⁵⁸

¹⁵⁷ The review covered vacancy notices written in the different European languages. Therefore, the words mentioned are actually translations made by the country researchers. Other words

5.3.1 Extent to which the most useful foreign language is required

Most vacancies (just below 90%) required the most important foreign language, rather than mentioning it as a desirable element. As shown in Figure 59, differences between sectors are very small.

Figure 59: Required or desired, most useful language, by sector



Source: Online vacancy database review, ICF International, 2015.

As in the case of the information collected through interviews, when data are considered by country (not shown here) there is more variance between the proportions of vacancy notices requiring and desiring language skills than there is among the sectors: Only around half of the vacancies ‘required’ language skills in the United Kingdom (46%) and Ireland (56%). These were the lowest proportions among Member States. They were followed by Belgium (Wallonia), France and Poland, but in these countries the share of vacancies ‘requiring’ the main foreign language was at least three quarters.

The degree to which language skills are required varies only slightly by language purpose (not shown here). The share of job vacancies requiring the demanded most useful foreign language is lowest for jobs involving the use of tools and equipment (85%) and highest for jobs involving collaboration on transnational projects and communication in communities of highly specialised professionals (91%).

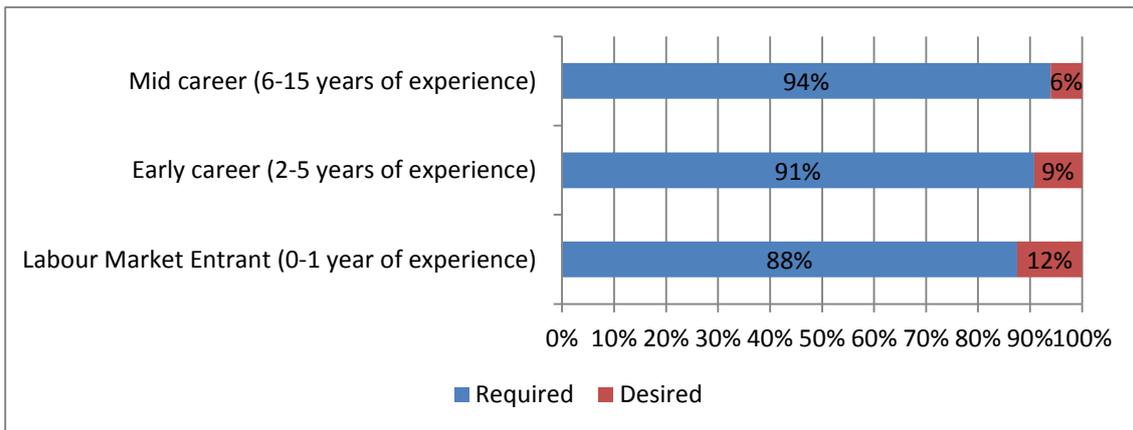
Vacancy notices indicate that required language skills for the most useful foreign language increase with both educational requirements and work experience. For labour market entrants, employers’ most useful languages are required by close to 90% with the share of employers requiring their most useful language increasing at each stage of a person’s career from early career to mid-career¹⁵⁹ (Figure 60).

and expressions used include: a plus, an extra, a bonus, a preferred requirement, useful, desired, welcome, appreciated, important, ‘help working’, or ‘help in succeeding’.

¹⁵⁸ The words and expressions used include: ‘expected’, ‘required’, ‘obligatory’, ‘essential’, ‘necessary’, ‘you must have very good skills...’, ‘you master (language)’, or ‘you have a command of (language)’.

¹⁵⁹ There are only 18 observations for later career professionals (>15 years of experience). They are therefore omitted from the analysis.

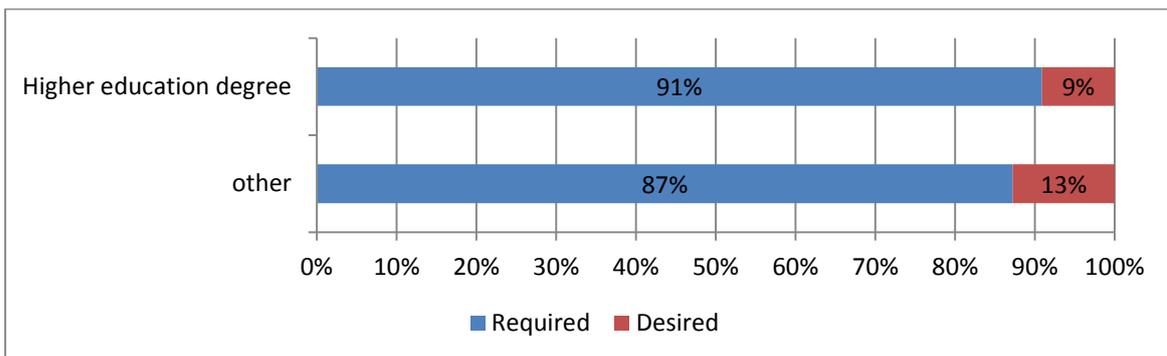
Figure 60: Share of employers requiring their most useful languages, by career stage



Source: Online vacancy database review, ICF International, 2015.

Employers more often require the most useful foreign language from candidates with a higher education degree than from those without such a degree (Figure 61). The difference, however, is small.

Figure 61: Share of employers requiring their most useful language, by education level



Source: Online vacancy database review, ICF International, 2015.

5.3.2 Extent to which the second most useful foreign language is required

More than one third of the vacancy notices required or desired a second foreign language. Close to half of these vacancy notices required a second language, while the rest included a second foreign language just as a desirable element.

Considering differences across sectors, knowledge in a second foreign language is more often considered required (rather than desirable) in the Transportation and storage sector, followed by the Professional, scientific and technical activities sector, and the Accommodation and food service activities sector (Figure 62).

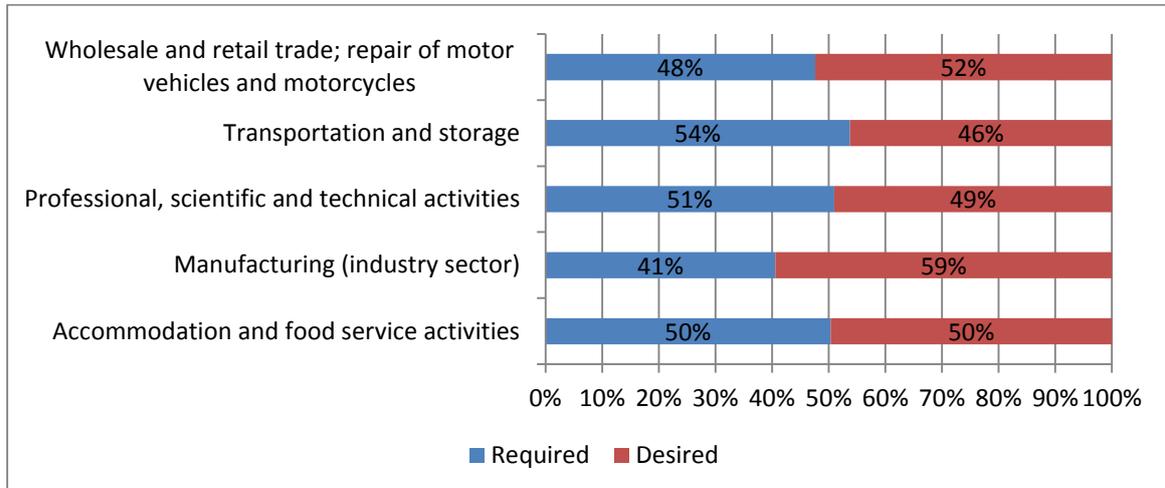
When examining the data by country, patterns are less clear than in the case of the first foreign language. In quite a few countries (AT, BE-fr, DE, FI, HR, IE, MT, PL, SE, and UK) more than two thirds of the vacancy notices include a second foreign language only as a desired element. A second foreign language is more often required in Latvia and Belgium (Flanders).¹⁶⁰ In the first case, the most often requested languages are English and Russian, the latter being used as the first language by a significant part of the population.¹⁶¹ In the second case, the most often requested

¹⁶⁰ It was also the case in Slovakia and Slovenia. See above.

¹⁶¹ According to the data of Population and Housing Census 2011 conducted by the Latvian Central Statistical Bureau, more than one third of the population speak Latvian at home

languages are English and French, the latter being an official language in Belgium (in the French-speaking Community).¹⁶²

Figure 62: Required or desired, second most useful language, by sector



Source: Online vacancy database review, ICF International, 2015.

As in the case of the first most useful language, the degree to which language skills in the second language are required shows slight variations by language purpose. The rate is again the lowest for jobs involving the use of tools and equipment (39%) compared to about 50% for jobs using foreign languages for other purposes.

There is no strong relationship between the extent to which second most useful languages are required and the career stage and or education required. The data (not shown here) indicate that these skills are less often required from labour market entrants but the difference is small compared to other stages in the career. Also, second most useful foreign languages are more often required from higher education graduates compared to those without a degree, but the difference is very small (50% vs 48%).

5.3.3 Extent to which the third most useful foreign language is required

9% of the vacancy notices required or desired a third foreign language. The third most useful language is much less often required than the second most useful language, as can be seen in Figure 63.

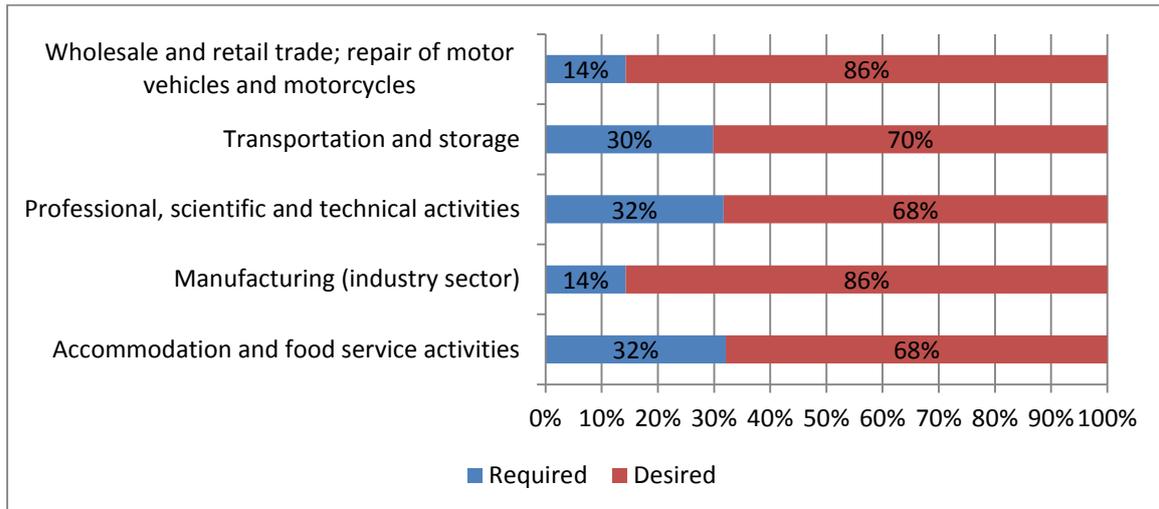
The sectoral differences are similar to the ones observed for the most and second most useful foreign language: job applicants are most often required to have foreign language knowledge in three languages in the Transportation and Storage sector, the Professional, scientific and technical activities sector, and the Accommodation and food service activities sector.¹⁶³

(26.9.2013). <http://www.csb.gov.lv/en/notikumi/home-latvian-spoken-62-latvian-population-majority-vidzeme-and-lubana-county-39158.html>

¹⁶² Country researchers were asked to not consider vacancy notices requiring a foreign language for domestic purposes only. In bilingual countries or countries with large minorities, a clear differentiation was, however, difficult as the foreign language is both important for domestic purposes and trade (e.g. Russian in Estonia and Latvia, French in Flanders, German for French-speaking companies in Luxembourg, etc.).

¹⁶³ The number of observations is too low to establish differences by country.

Figure 63: Required or desired, third most useful language



Source: Online vacancy database review, ICF International, 2015.

Career stage and educational requirements seem to be unrelated to whether a third foreign language is required or desired (data not shown here).¹⁶⁴

5.3.4 Summary

According to the review of vacancy notices, when employers demand at least one foreign language, the most useful foreign language is more often required than only desirable. Almost all the vacancies (more than 9 in 10) defined the most useful foreign language as an essential requirement of the job, across all sectors. Higher level jobs (in terms of required work experience and educational attainment) more often require the competency specified in the most useful foreign language than lower level jobs, although differences are small. There is no clear relationship between the language purpose and the likelihood of the most useful language being required for the job.

Considered by country, the English speaking countries Ireland and the UK have the lowest share of vacancy notices which require rather than desire foreign languages.

Competency in the second most useful language is much less often required than competency in the most useful language. Around half of employers require rather than desire competency in the second most useful language with the exception of the Manufacturing sector where the proportion is smaller (around 4 out of 10). There is no clear relationship between the job level and likelihood of the second most useful language being required for the job. The second most useful foreign language is significantly less often required for jobs involving the use of tools and equipment than in jobs using foreign languages for other purposes.

Competency in the third most useful language is much less often required than competency in the most useful and second most useful language. Career stage and educational requirements seem to be unrelated to whether a third foreign language is required or desirable.

¹⁶⁴ No conclusions are possible on the association between requiring/desiring a third foreign language and the purpose of this language due to a low number of observations in some of the categories.

5.4 Extent to which vacancy notices refer to EU-level tools (CEFR, Europass), foreign language certificates, and international experience

This section considers the use of EU-level tools for reporting and documenting foreign language proficiency, such as the CEFR, and the Europass CV, and the mentioning of foreign language certification and international experience in vacancy notices.

Few vacancies mentioned the CEFR or used it to indicate foreign language requirements. One of the exceptions was a Slovak portal supported by the Ministry of Labour and the public employment service, which uses the CEFR levels to indicate demanded foreign language proficiency in its job vacancy notices.¹⁶⁵ Including the review of vacancies from this Slovakian portal resulted in an overall rate of use of the CEFR of 4%. Excluding it, the overall rate of use is under 1% and, in 17 countries, it was not used at all.¹⁶⁶

Even fewer vacancies ask for the submission of a CV in the Europass format. There were only four vacancies mentioning it total (one in Croatia, one in Portugal and two in Slovenia).

Language certifications were explicitly required in less than 1% of the vacancies. While some of these refer generically to any certification, others asked for specific certificates (e.g. Cambridge English exams, Berlitz levels, IELTS, TOEFL, school leaving certificates).

Experience abroad was explicitly mentioned in around 1% of vacancies but an additional 2% referred to experience in international environments or in internationally-oriented roles. The demand for international experience is often linked to the knowledge of the business and the tasks to be performed in the job advertised (e.g. *experience in the international shipping business, international driving experience, experience in development and implementation of EU projects, experience with international customers*). However, employers also sometimes associate it with openness to other cultures (e.g. *excellent communications skills, also with partners coming from different cultural backgrounds*).

5.4.1 Summary

Vacancy notices seldom use the CEFR to indicate foreign language requirements or ask for the submission of a CV in the Europass format. Language certifications and experience abroad, in international environments and/or in internationally-oriented roles are also not frequently mentioned in vacancies.

¹⁶⁵ www.istp.sk. Two other significant portals in Slovakia (www.profesia.sk and www.kariera.sk) also use structured categorisations of language levels, although not the CEFR.

¹⁶⁶ BEfr, BEnl, BG, CZ, DK, EL, FI, FR, HR, HU, IE, LT, LV, MT, NL, SE, SI and UK.

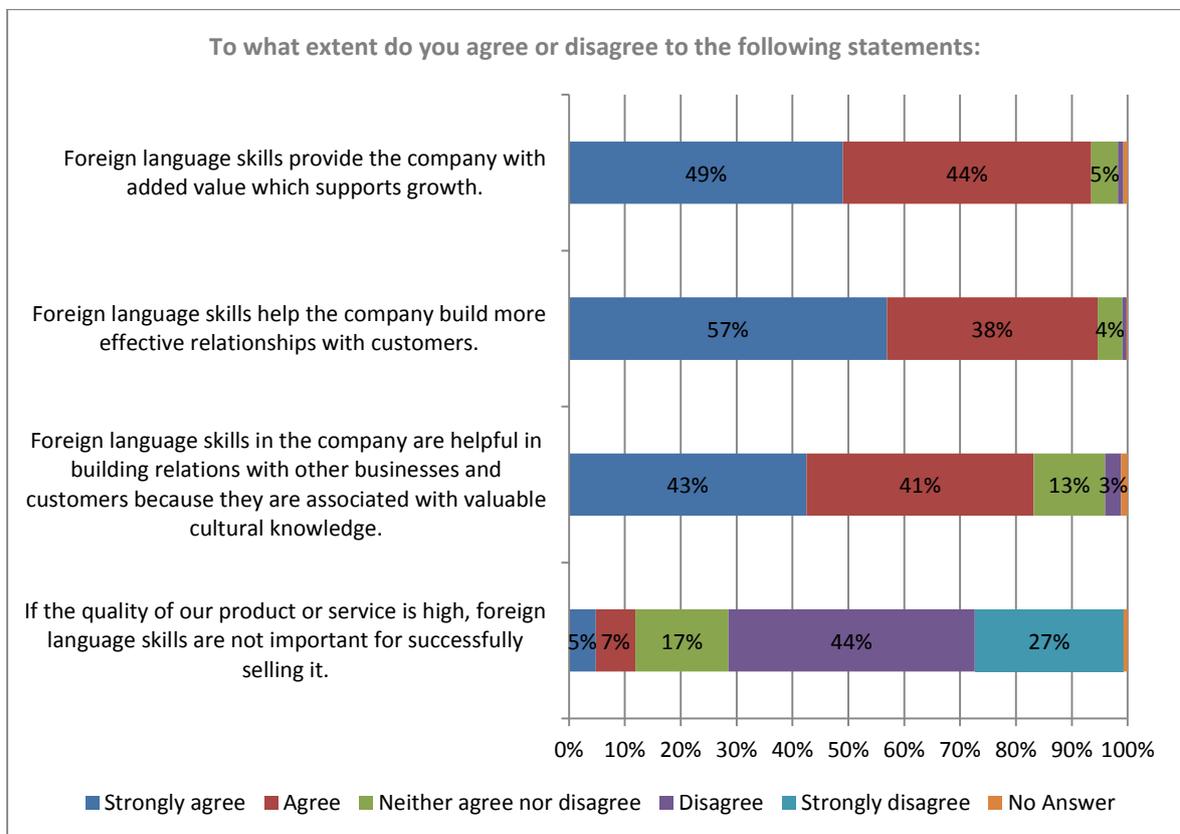
6 SURVEY RESULTS

After the vacancy database review a survey was conducted among employers in order to gather information on knowledge gaps which were not addressed in the interviews and the vacancy database review. Employers' responses to survey questions are presented in this section.

6.1 *The added value of foreign language skills for businesses*

A clear majority of employers believe that foreign language skills add value to the company by supporting growth and by helping to build more effective relationships with customers. Four in five employers strongly agree or agree that part of the value added by foreign language proficiency in the company stems from the valuable cultural knowledge that is associated with it. Employers clearly disagree that foreign language skills play no role for a company's success if the quality of the company's product or service is high, indicating that high quality products and services need foreign language skills to be sold.

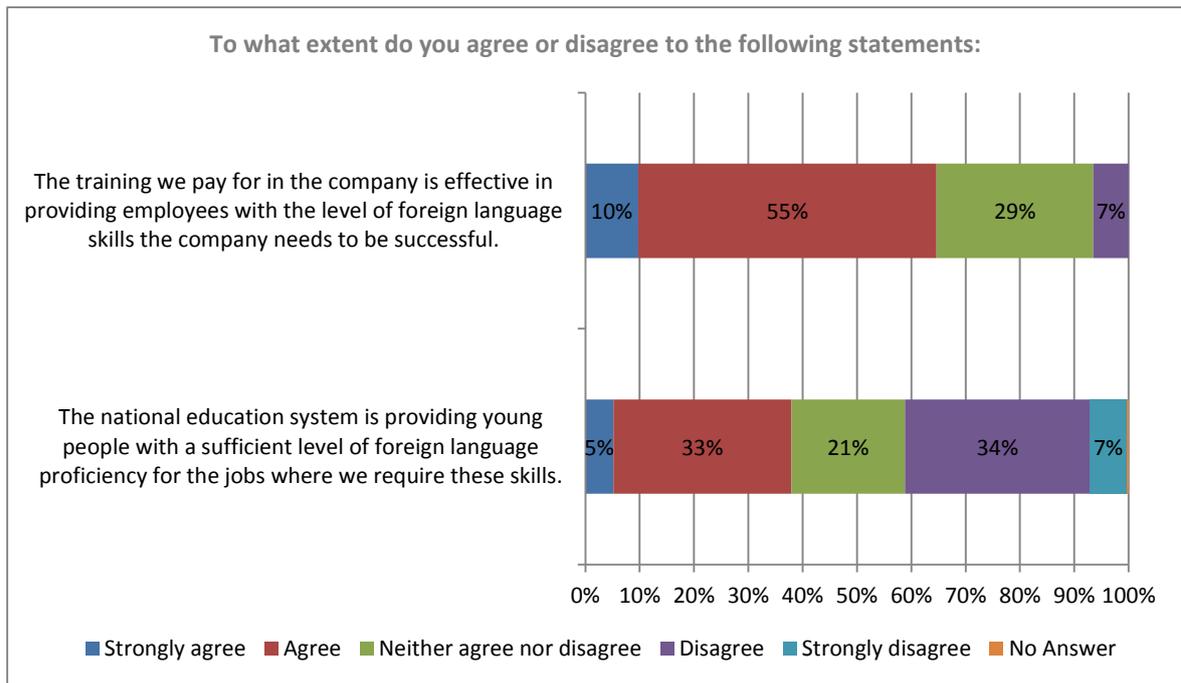
Figure 64: The added value of foreign language skills in the company



6.2 *The effectiveness of company-paid training and the national education system in providing the labour force with foreign language skills*

Nearly half (47%) of employers state that their company pays for foreign language training of their employees. Of these, two thirds strongly agree or agree that the training they pay for is effective in providing employees with the level of foreign language skills the company needs to be successful, with few disagreeing. Employers' perception of the effectiveness of the national education system in providing the labour force with the foreign language skills needed is less positive. There are roughly as many employers who (strongly) agree that the national education system is effective as there are employers who (strongly) disagree that this is the case.

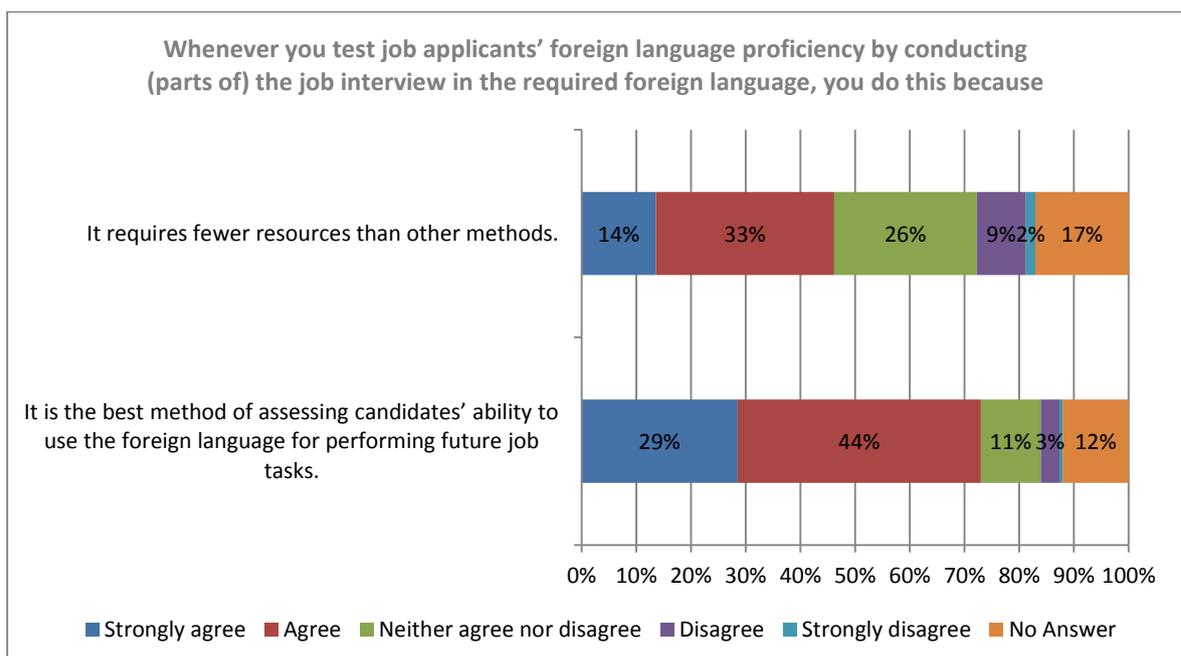
Figure 65: Effectiveness of company-paid training and the national education system in providing employees with the needed foreign language skills



6.3 The use of job interviews to verify applicants' foreign language proficiency

The interviews with employers found that most employers verify applicants' foreign language skills by conducting (parts of) the job interview in a foreign language (Section 4.7.1). In the survey of employers, two hypotheses regarding the reason for this were tested. While cost arguments play a role, the method's effectiveness seems to be the decisive factor in employers' decision to carry out job interviews in a foreign language, as shown in Figure 66.

Figure 66: Reasons for using job interviews for verifying applicants' foreign language proficiency



6.4 The lack of distinction of oral and written skills in vacancy notices

The survey also asked employers why, according to them, the majority of vacancy notices do not distinguish the level of oral and written foreign language skills required or desired for the job.¹⁶⁷ While employers state various reasons, about half believe that this is the case because both types of skills are needed and because they are interlinked, for example:

"Because both forms of communication are important".¹⁶⁸

"Because both types of skill go hand in hand".¹⁶⁹

"It is assumed that if a person knows the language, it automatically means both oral and written skills".

The other half of employers provides a broad variety of other reasons why vacancy notices generally do not distinguish between oral and written skills.

Some employers, for example, believe that vacancy notices do not distinguish oral and written skills because applicants will know what the requirements are based on experience and the job tasks described in the vacancy notice.

"It is often clear from the description of duties"¹⁷⁰

Other employers state that while the job advertisement does not distinguish the required levels of oral and written skills, this is later assessed during the job interviews and, if necessary, written tests. Responses suggest that in some circumstances it may be rational for employers not to be too specific in the vacancy notices, for example, because of difficulties in relation to applicants' reporting and self-assessment of their level of relevant foreign language skills:

*"Most CVs do not correspond to reality and often do not specify the level. So we prefer to test both oral and written skills in situ and not to say anything in the vacancy notices."*¹⁷¹

*"Our company does not distinguish between oral and written language skills when writing ads. The most important reason for this is the fact that candidates have very different (subjective) views on what degree of foreign language knowledge is required. For example, all candidates state they have good or even excellent English skills. In reality, the variance of candidates' foreign language skills is very high."*¹⁷²

*"Knowledge can be verified during interviews. Then the emphasis is on what is important, you do not need to write about it in the announcement"*¹⁷³

While some employers find it unnecessary to specify foreign language requirements in the vacancy notices, some employers even find it strategically preferable to be unspecific in the vacancy notices in order not to deter possible applicants:

*"Foreign language skills are very rare, and as an employer you are forced to use every possibility to get new employees."*¹⁷⁴

¹⁶⁷ The survey question read as follows: "We have found that many online advertisements for jobs requiring foreign language skills do not differentiate between the oral and written foreign language level required. Why do you think this is?"

¹⁶⁸ Respondent 49

¹⁶⁹ Respondent 105

¹⁷⁰ Respondent 195

¹⁷¹ Respondent 91

¹⁷² Respondent 147

¹⁷³ Respondent 153

¹⁷⁴ Respondent 272

There are also a number of employers who are critical about the practice of not distinguishing oral and written foreign language needs, attributing it to a lack of awareness among recruiters and employers in general:

*"I think most companies were forced to enter the international market to which they were not prepared, one of the conditions is often a second language, most are small - medium enterprises that do not have experience in recruiting for positions requiring foreign language skills."*¹⁷⁵

*"It is probably due to lack of awareness that there can be large differences in the written and oral language skills."*¹⁷⁶

*"[There is a] Lack of awareness of the importance of specifying the difference between oral and written language skills."*¹⁷⁷

*"Maybe we do not fully understand the difference and believe that anyone who knows a foreign language knows it at every level."*¹⁷⁸

One employer lists the steps which in his or her opinion should take place before the job advertisement is formulated and placed:

*"The central issue must be before each job posting: What will the foreign language be used for? Do we need passive or active knowledge? Written or oral skills? High linguistic or ordinary language? Are we searching for native speakers?"*¹⁷⁹

6.5 Summary

Employers believe that foreign language skills add value to the company. Almost all respondents of the survey strongly agree or agree that foreign language skills help building more effective relationships with customers and provide value for growth.

Consistent with this, most employers disagree or strongly disagree that high quality products or services do not require foreign language skills to be successfully sold.

With regard to the supply of foreign language skills, most employers strongly agree or agree that company paid training is effective in providing employees with the foreign language skills they need for their job. Evaluating the national education system contribution to the supply of foreign language skills, there are roughly as many employers who agree and disagree that national education systems are effective in providing companies with the foreign language skills they need.

Employers propose a variety of reasons for the lack of distinction between oral and written skills in the majority of job advertisements, showing the lack of clarity associated with this practice. Most of them indicate that they believe that a lack of distinction means that both types of skill are needed. Some competing views were expressed. While some employers expect applicants to know what is expected from experience and the job tasks described, others keep job advertisement descriptions broad and general as they do not find applicants' reporting and self-assessment of foreign language skills reliable and test them later in the recruitment process. Few employers criticise the lack of distinction between oral and written skills and attribute this to a lack of awareness among recruiters and employers of the importance to make this distinction.

¹⁷⁵ Respondent 25

¹⁷⁶ Respondent 10

¹⁷⁷ Respondent 152

¹⁷⁸ Respondent 367

¹⁷⁹ Respondent 369

7 COMPARISON OF FINDINGS FROM THE INTERVIEWS WITH EMPLOYERS AND THE ONLINE VACANCY DATABASE REVIEW

The collection of data from different sources allows for the triangulation of information on the foreign languages most often demanded by employers, the extent to which foreign languages are required or desired, the level of proficiency required or desired, and the use of tools, such as the CEFR. If findings are broadly the same, this would be further evidence for the reliability of this study's findings. Some differences between the findings from the two datasets may arise for the following reasons:

- While employers were asked directly about foreign language needs in the interviews, these were derived from expressions and words used in vacancy notices in the analysis of online vacancy database data;
- While employers were asked to answer questions in reference to a *typical* position in their company which requires/desires foreign languages, vacancy notices express needs for currently open positions;
- There may be a discrepancy between the actual needs of employers (stated in interviews) and needs expressed in vacancy notices.

7.1 Most useful and second most useful languages

With regard to the foreign languages most often demanded by employers, findings of the employer interviews and the online database review coincide with regard to the top five languages demanded (English, German, Russian, French and Dutch), the exception being the weighted data from the interviews in which Spanish and Polish are among the Top 5. Table 13 shows that there are also strong similarities between the findings from the two data sources in relation to the level of demand for these languages, indicating the high reliability of the results. The main difference between the two data sources is the lower share of English and the higher share of "other" languages found in the review of online vacancies.

Table 13: Share of most useful languages by data source

Data source	English	German	Russian	French	Dutch	Spanish	Polish	Other
Employer interviews								
Unweighted	81%	8%	3%	2%	2%	1%	1%	2%
Weighted	80%	6%	1%	3%	1%	2%	2%	5%
Database review								
Unweighted	74%	7%	5%	4%	2%	1%	0%	7%
Weighted	72%	7%	2%	7%	2%	1%	0%	9%

For the second most useful language, findings from the two data sources are again very similar. According to both sources, German, Russian, English and French are the foreign languages most often indicated as second most useful when not weighted. As can be seen in Table 14, however, the ranking differs between the two data sources. While Spanish emerged as the fifth and Italian as the sixth most often named second most useful foreign language from the employer interviews, they were equally demanded according to the database review. With regard to the level of demand for languages, similar figures emerge from two data sources, with the largest difference arising for English (unweighted and weighted data) and French (weighted data). For both datasets, weighting leads to a sharp drop of the importance of Russian.

Table 14: Share of second most useful languages by data source

Data source	German	Russian	French	English	Spanish	Italian	Other
Employer interviews							
Unweighted	32%	15%	13%	12%	6%	5%	17%
Weighted	31%	4%	26%	7%	6%	2%	24%
Database review							
Unweighted	26%	11%	10%	24%	4%	4%	21%
Weighted	24%	5%	16%	17%	5%	5%	28%

The results by sector vary a little between data sources. In both data sets the Manufacturing sector has a high share of employers requiring/desiring English as the most useful language relative to the other sectors (82% according to interviews; 78% in the database review). At the other extreme, the Transportation and storage sector has the lowest share according to the interviews (77%); however, the share is similar to that of other sectors according to the vacancy review. While the database review data suggests that the share of employers in Professional, scientific and technical activities that demand English as the most useful foreign language is as low as in the Transportation and storage sector, according to employer interviews this share is the highest of all sectors.

Both data sources show that the share of employers requiring/desiring German as the most useful foreign language is highest in the Manufacturing and the Transportation and storage sector.

7.2 The level of proficiency required/desired

The findings in relation to the level of foreign language proficiency demanded by employers from the two data sources are broadly consistent. The analysis of the data from the employer interviews found that for the most useful foreign language (for the second most useful foreign language) 52% (28%) of employers demanded a high level, 39% (50%) demanded a medium-level and 9% (21%) demanded a low level of oral skills. According to the results from the database review, demanded proficiency levels were higher, in particular in terms of the proportion of jobs requiring a high level of proficiency for the second most useful language. 57% (46%) of vacancy notices demanded a high level of proficiency for the most useful foreign language (second most useful foreign language), 38% (43%) demanded a medium-level, and 5% (11%) demanded a low level of foreign language proficiency.

The findings of both the employer interviews and the online vacancy database review suggest that there is a weak positive relationship between the level of foreign language proficiency required/desired and required years work experience, and a strong positive relationship between the level of foreign language proficiency required/desired and the educational level required for the job.

7.3 The extent to which foreign languages are required or desired

According to both the employer interviews and the database review, almost 9 in 10 employers require rather than desire the most useful foreign language. While the data from the employer interviews shows differences across sectors (80% in Accommodation and food service activities vs. 94% in Professional, scientific and technical activities), these are not as great from the database review data (the shares differ only by 4% across sectors).

Almost 8 in 10 employers stated that a second foreign language was required or desired for the job discussed, while the review of online vacancies found that 4 in 10 vacancies require or desire a second foreign language. This stark difference may stem from the difference in positions discussed, but could also be interpreted as suggestive of employers' hesitation, but also sometimes inability, to express actual needs accurately in vacancy notices.

Of those mentioning a second foreign language, the share of employers requiring it is significantly higher (49%) according to the database review than according to the data from the employer interviews (30%). Overall (taking into account the share of employers expressing a need for a second foreign language), the proportion of jobs requiring a second foreign language is similar according to both datasets (23% according to the interviews and 19% according to the online vacancy database review), suggesting that it is mainly the actual desire for foreign languages other than English that is not expressed in vacancy notices.

While employer interviews clearly suggested that the extent foreign languages are required increases with the job role (i.e. work experience and the educational qualification required) there are only small differences between job roles according to the review of online vacancy databases.

7.4 Summary

The findings from both data sources in relation to the foreign languages required/desired are overall coherent. The most important differences are:

- Demanded proficiency levels found in vacancy notices were higher than those expressed by employers during interviews, in particular in relation to the share of positions requiring a high level of proficiency for the second most useful language (46% and 28% respectively);
- Second foreign languages as a desirable skill of job applicants are less often expressed in job vacancies than they are mentioned in interviews;
- Sector differences are smaller according to the review of online vacancy databases than according to employer interviews.

8 CONCLUSIONS

This section summarises the findings of this study, assesses the findings against what is known about the supply of foreign language proficiencies in the labour market, and discusses the implications of the interplay of supply and demand of foreign language proficiency for employers, adult education and continuing VET, higher education, and school education and initial VET.

8.1 Summary of findings

The evidence draws on qualitative evidence provided by interviewees which is a broadly representative sample of employers in the five selected sectors in EU Member States, and which is verified and added to through the quantitative evidence collected from the online vacancy database review. The findings provide highly valuable, structured qualitative evidence sufficient to address the study's research questions.

8.1.1 Language needs depend on the foreign language-related tasks to be performed in the company...

The evidence collected shows that foreign languages skills required from applicants are linked to tasks to be performed in the job. Based on information gathered during interviews with employers, Section 4.2 suggests that six main purposes of language skills in businesses can be distinguished. These are:

- Sales, purchase and marketing;
- Execution and administration of imports and exports;
- Internal relations and communication in multinational companies;
- Customer service;
- Collaboration on transnational projects, and communication within international communities of highly specialised professionals;
- The use of tools and equipment.

The analysis of online vacancy database review data identified similarities but also important differences in language needs related to these six purposes, for example:

- For both oral and written skills, and for both the most useful and second most useful foreign language, foreign language requirements are highest in job roles involving the selling, purchasing and marketing of products and services, as well as in jobs using foreign languages for internal communication and jobs involving collaboration on transnational projects and communication within communities of highly specialised professionals. Jobs related to the execution and administration of imports and exports, and jobs in customer service significantly less often demand high levels of foreign language proficiency, for both oral and written skills, suggesting that in these job roles foreign languages are used much more often in routine contexts requiring medium or low foreign language skills. Jobs requiring foreign language skills for the use of tools and equipment clearly have the lowest foreign language requirements, indicating that foreign language use in these jobs is often basic and routine.
- The second most useful foreign language is significantly less often required for jobs involving the use of tools and equipment than in jobs using foreign languages for other purposes.

In all of the five sectors examined in this study, positions – often with similar names - linked to these six main purposes can be found. What differs across sectors is their frequency, which naturally depends on the sectors' core business (e.g. customer service for accommodation and food service activities; the execution and administration of imports and exports for the Transportation and storage and the Wholesale and retail trade sectors; people working in the Professional, scientific and

technical activities sector belonging to international communities of highly specialised professionals).

This results in sector-specific language needs, for example:

- The Professional, scientific and technical sector has the highest shares of employers demanding high level oral foreign language proficiency, both for the most and second most useful foreign language;
- In the Accommodation and food service activities sector employers tend to require higher levels of oral than written skills. This is due to the strong customer service focus of positions in this sector, such as receptionists and waiters. The Professional, scientific and technical activities sector is distinct from the other sectors in that employers in this sector demand equally high levels of oral and written proficiency from employees, as a result of professionals' need to, for example, present their work at international conferences and to publish in English.

8.1.2 ...and the languages used by customers and trade/business partners

The most important driver of required languages appears to be the language used by customers, clients and partners. The foreign language most often required by employers is English, regardless of the sector. This study is not the first which finds that English is not only used for communication with English-speaking countries but has gained the status of a *lingua franca* – being used for most communication between international trade partners.¹⁸⁰ Nevertheless, this study finds that between a **fifth and a quarter of employers consider a language other than English** as the most useful. The dominance of English as the most useful foreign language is similar in all of the five sectors, but there are clear differences between jobs using foreign languages for different purposes. While the data indicate that English is the most useful foreign language in about 85% of jobs involving collaboration on transnational projects and communication within communities of highly specialised professionals and jobs demanding a foreign language for the use of tools and equipment, English is significantly less often the most useful foreign language in jobs in sales, purchase and marketing departments (70%), jobs associated with the execution and administration of imports and exports (70%), as well as customer service jobs (72%).

Besides English, the three most important languages are **German, French and Russian**.

More than one third of the job vacancies demanding language skills identified through the database review require or desire applicants to have knowledge of a second foreign language. This share is higher in the case of the vacancies discussed with employers in the interviews (three quarters). This suggests that there exists a multiplicity of situations in which enterprises need or wish to use foreign languages other than English. The most cited second most useful language is German, followed by Russian, English and French. Considering the second most useful foreign language by country, sector and language purpose provides the following insights:

- The second most useful foreign language is often the language of a neighbouring country;
- The importance of German as the second most useful foreign language is highest in the Manufacturing and the Transportation and storage sectors;
- German is particularly in demand as a second most useful foreign language in jobs involving operating tools and equipment. The data also suggests that both German and English are often used for internal relations and communication.

¹⁸⁰ Also found by for instance Didiot-Cook, H., Gauthier, V. & Scheirlinckx, K. (2000), the PIMLICO project (COTANCE, 2011) and the ELAN study (DG EAC, 2006).

For the most useful foreign language, employers interviewed most often ask applicants to have high (C1-C2) or medium level (B1-B2) foreign language proficiency, enabling them to effectively communicate with native speakers, even if limited to familiar contexts. The demanded level of foreign language skills for the most useful foreign language seems to be positively associated with the job level: positions requiring a higher education degree, and positions requiring more than one year of work experience tend to have higher foreign language requirements.

For the second most useful foreign language, employers interviewed most often asked for medium level skills (B1-B2), both in oral and written language, and many employers are content with a low level of proficiency (A1-A2), enabling workers to transmit short and simple messages both orally and in writing. The positive relationship between the job level and the level of required foreign language skills found for the most useful foreign language is less clear for the second most useful foreign language.

Employers' responses indicate that in general the tasks performed by higher education graduates demand a higher level of foreign language skills than tasks performed by people without a higher education degree.¹⁸¹

This study finds that the level of foreign language skills demanded does not depend on the size of the business.

8.1.3 Employers rarely use formal standards to indicate the level of language competence in vacancy notices

Recruiters rarely use formal classifications to indicate the level of language competence in vacancy notices. Findings suggests that not using formal classifications leads to the use of terms and expressions to indicate proficiency levels that are vague and often there is no reference to any required level in vacancy notices. Moreover, the majority of vacancy notices do not distinguish between levels of oral and written skills demanded. Not using formal standards for expressing foreign language needs in vacancies may result in an overstatement of proficiency levels required or desired for the job, in particular for the second foreign language (for the second foreign language the levels required or desired stated in online vacancies are substantially higher than those mentioned in the interviews).

Commonly reported reasons are:

- The effort necessary to understand formal classifications (both by employer and applicant);
- The lower importance of foreign language skills compared to other skills;
- A lack of awareness among recruiters and employers in general;
- Employers deliberately being vague about foreign language requirements in order not to discourage potential applicants who are not confident of their foreign language skills.

The latter may indicate an undersupply of applicants with sufficiently high foreign language proficiency. At the same time, there is less motivation for learners if they don't see jobs advertised with languages.

8.1.4 Employers most often test applicants' foreign language proficiency during the job interview

There exists a wide range of methods employers use to verify applicants' foreign language proficiency, from looking for international experience in CVs to relying on school grades or language certificates from testing services. These are often

¹⁸¹ This finding is in line with DG EAC (2006), DG EAC (2011) and Chancelade et al. (2015)

subjective and generally not clearly linked to standards and levels for language competences set out in the CEFR, for example.

Nearly half of the employers interviewed, however, use oral tests and assess candidates' foreign language skills as part of the job interview¹⁸², with some variation across sectors. The Accommodation and food service activities sector where oral communication is more important than written, is the sector where oral tests are more often used for language skills verification (half of the employers use them). In the Professional, scientific and technical sector which has the highest shares of employers demanding high level written foreign language proficiency, a combination of oral and written tests, as well as written tests alone, are more often used than in the other sectors. Apart from its low costs, the advantage of oral tests is that an interview in a foreign language can test exactly the foreign language skills which the applicant will be demanded to perform in the job. In fact, according to the survey results, the method's effectiveness seems to be the decisive factor in employers' decision to carry out job interviews in a foreign language.

Some employers demand the application to be submitted in a foreign language in order to obtain a preliminary assessment of applicants' foreign language skills. There also appears to be a negative relationship between the use of verification methods which are less tailored to the specific needs of the employer, namely the certification by third parties, and the importance of foreign language skills for the position.

8.1.5 Initial education plays an important role in supplying businesses with foreign language skills

The need for foreign language skills is mainly tackled through the recruitment of new employees with the necessary foreign language skills. Recruitment in combination with internal training is also important in meeting employers foreign language needs.

Nearly half (47%) of the employers responding to the survey state that their **company pays for foreign language** training of their employees. For job seekers who do not completely fulfil a vacancy's foreign language requirements recruiters tend to assess whether the applicant's foreign language knowledge provides a sufficient basis for further improvement through internal training. Evidence from the interviews suggests that employers are generally reluctant to finance time-intensive language training for employees given the high costs associated with language training, both in terms of direct and opportunity costs. In all sectors, firm-sponsored training therefore tends to focus on the upgrading of existing language skills rather than teaching employees new languages or taking their language competences to a significantly higher level. It is not clear to what extent training raises levels of competency needed for higher level jobs.

8.1.6 Recruitment of native speakers is mainly done in relation to very specific foreign language demands

One fourth of employers interviewed had recruited a native speaker (foreign nationals) to meet language demands in the past 12 months. The hiring of native speakers is mostly related to demand of a particular language which is uncommon and insufficiently supplied in the national labour market. Recruitment of foreign nationals does not necessarily take place across borders as recruits are often found in the local migrant population.

¹⁸² Similarly, the LEMP study (Chancelade et al., 2015) found that two thirds of the French employers surveyed used interviews in a foreign language to assess the foreign language skills of job applicants.

8.1.7 Recruitment difficulties (bottlenecks) are mainly due to an insufficient foreign language proficiency of applicants

About one third of employers have difficulties filling vacancies as a result of a lack of applicants' foreign language proficiency. Two thirds of these difficulties are due to an insufficient level of foreign language skills and one third due to a lack of applicants proficient in a particular language. Against this backdrop, some employers in non-English speaking countries mentioned during interviews that while English language skills of applicants have improved over recent years, applicants' proficiency level of languages other than English is not improving. Although recruitment difficulties do not necessarily result in vacancies not being filled, they prolong the recruitment process and increase the recruitment costs incurred by enterprises.

The assessment of changes in difficulties substantially varies across sectors with the share of employers expecting more difficulties in the future compared to the recent past being greatest in the Accommodation and food service activities sector. One explanation for this finding may be the combination of relatively low pay and relatively high foreign language proficiency requirements for receptionists – a reason for recruitment difficulties which was regularly mentioned by employers in this sector during interviews.

8.1.8 Foreign language skills provide competitive advantage both for businesses and job seekers – if they form part of a broader set of useful skills

About a quarter of employers feel that their competitors have a competitive advantage because of their stock of foreign language skills, with some variation across sectors.¹⁸³ The sectors in which employers believe their competitiveness least affected by the stock of foreign language skills of competitors are the Transportation and storage sector and the Manufacturing sector (about one fifth of employers).

The market in which competitive advantage is gained through language proficiency differs across sectors. While this is clearly the domestic market in the Accommodation and food service activities sector, it is foreign markets which are affected by competitors stock of foreign language skills in the Transportation and storage, Professional, scientific and technical activities and Manufacturing sectors. In the Wholesale and retail trade sector both markets appear to be similarly affected.

The results of the employer survey carried out as part of this survey clearly underline the added value of foreign language skills for businesses: 70 percent of employers strongly disagree or disagree with the statement that foreign language skills are not important for selling a product if the quality of the product is high (an argument some employers brought forward during the interviews). More than 90 percent of employers strongly agree or agree that foreign language skills provide the company with value added which supports growth, and that foreign language skills help the company build more effective relationships with customers. More than 80 percent of employers strongly agree or agree that foreign language skills are associated with valuable cultural knowledge which helps companies build relationships with other businesses and customers. This indicates that while merely having foreign language skills is not enough for businesses to be successful, they are of advantage for developing and maintaining both foreign and domestic markets.

For individuals, foreign language skills generate a competitive advantage provided they form part of a broader set of useful skills. In combination with the right educational background and relevant work experience, foreign language skills provide access to jobs in international trade and services for which they are a prerequisite.

¹⁸³ This is likely to be a lower bound estimate as some employers argued that competitors do not have a comparative advantage since all businesses recruit from the same labour market and face the same foreign language skill constraints.

There is also evidence, although not as clear cut, that foreign language proficiency facilitates career progression. These findings add to existing evidence of foreign language skills as a distinct advantage for job seekers.¹⁸⁴

8.2 Contextualising the findings: the supply of language skills

This section puts this study's findings on the demand of foreign language proficiency into context by briefly summarising what is known about the supply of foreign language skills.

8.2.1 Language learning in primary and secondary education

According to a recent Eurostat analysis¹⁸⁵ more than 80% of pupils in primary education, 96% of pupils in lower secondary education, and 90% of pupils in upper secondary education learnt a foreign language in EU Member States in 2013. At all levels of school education, English is by far the most often learnt language. According to the Eurostat data, 77% of pupils in primary education, 96% of pupils in lower (upper) secondary education, and 94% of pupils in upper secondary education learn English.

About 5% of pupils in primary education and 58% in lower secondary education learn two or more foreign languages.¹⁸⁶ In upper secondary education, 51% of pupils in general programmes and 34% of pupils in vocational programmes learn two or more foreign languages.¹⁸⁷ At the European level, the second most commonly learnt foreign languages are similar to those identified by this study as in being the highest: French, German, Spanish, and Russian and Italian.

There are important differences across countries:

- In primary education, German was the most learnt foreign language in Luxembourg, and the second most common foreign language learnt in eight other European countries (CZ, FR, HR, IT, LT, HU, PL, SI). French was the second most common foreign language in primary education in seven (BE, DE, EL, ES, CY, LU, RO), Russian in two (BG, LV) and Spanish in two EU Member States (PT, SE).¹⁸⁸
- In lower secondary education, 28% of pupils in Europe learn French (most common foreign language in BE and second most common foreign language in DE, IE, EL, ES, CY, LU, NL, PT, RO), 16% of pupils learn German (second most common foreign language in CZ, DK, HR, HU, LU, PL, SI, SK, FI), 12% learn Spanish (second most common foreign language in FR and SE), and 2.7% of pupils learn Russian (second most common foreign language in BG, EE, LV, LT). Italian is the second most commonly learnt language by pupils in lower secondary education in Malta.

Numerous other languages are offered in schools across Europe. However, besides English, French, Spanish, German and Russian the percentage of pupils learning other languages was below 5% in most countries in 2009/10. In a significant number of countries, the percentage was less than 1%.¹⁸⁹

¹⁸⁴ See e.g. Mulkerne, S and Graham, A. (2011), Humburg et al. (2013), Chancelade et al., (2015).

¹⁸⁵ Eurostat news release 24 September 2015
<http://ec.europa.eu/eurostat/documents/2995521/7008563/3-24092015-AP-EN.pdf/bf8be07c-ff9d-406b-88f9-f98f5199fe5a>

¹⁸⁶ Eurostat (2015), table [educ_uoe_lang02], accessed 29.10.2015

¹⁸⁷ Ibid.

¹⁸⁸ Ibid.

¹⁸⁹ Commission Staff Working Document, Language competences for employability, mobility and growth, Accompanying the document Communication From the Commission Rethinking

Table 15 shows the most commonly learnt foreign language besides English in upper secondary education compared to the most commonly demanded foreign languages besides English in the vacancy notices reviewed in the framework of this study.

Table 15 Most commonly learnt versus most commonly demanded foreign language (besides English)

Country	Most commonly learnt	Most commonly demanded
Belgium	FR	FR
Bulgaria	DE	DE
Czech Republic	DE	DE
Denmark	DE	DE
Germany	FR	FR
Estonia	RU	RU
Ireland	FR	DE
Greece	FR	DE
Spain	FR	DE
France	ES	DE
Croatia	DE	DE
Italy	FR	FR
Cyprus	FR	RU
Latvia	RU	RU
Lithuania	RU	RU
Luxembourg	FR	DE
Hungary	DE	DE
Malta	IT	IT
Netherlands	DE	DE
Austria	FR	FR
Poland	DE	DE
Portugal	ES	FR
Romania	FR	DE

Country	Most commonly learnt	Most commonly demanded
Slovenia	DE	DE
Slovakia	DE	DE
Finland	DE	RU
Sweden	ES	DE
United Kingdom	FR	DE

Source: Eurostat 2015, Pupils by education level and modern foreign language studied - % of pupils by language studied [educ_uae_lang01], ICF database review, own calculations.

Table 15 suggests that in 11 out of 28 countries the most commonly learnt foreign language besides English does not correspond to the most commonly demanded foreign language besides English in job vacancies, indicating the existence of **mismatches between supply and demand**.

Mismatches also emerge when considering the level of foreign language proficiency supplied by the education system and demanded by the labour market. The study on Languages in Education and Training (2014)¹⁹⁰ finds that in 13 countries the minimum attainment of competence for the first foreign language at upper secondary education defined in national guidelines is B2 (AT, BE-de, CY, CZ, DE, EE, FR, IT, LT, LV, RO, SI, SK), seven specify B1 (BE-nl, ES, FI, HR, HU, PL, SE) and only LU specifies C1. The study also finds that most countries set the proficiency level to be achieved for the second foreign language below that of the first foreign language.

Comparing these targets to the actual levels achieved, as measured by the European Survey on Language Competences (2011)¹⁹¹ suggests that envisaged levels are not achieved by a substantial proportion of pupils. The ESCL¹⁹² found that in the first foreign language learnt on average 42% achieved an independent user level or better at the age of 15¹⁹³. This ranges from over 80% in Malta and Sweden (both in English) to less than 15% in France (for English) and UK England (for French). Nine countries are at a level less than 50% and only EE, MT, NL, SE, and SI are above 50%.

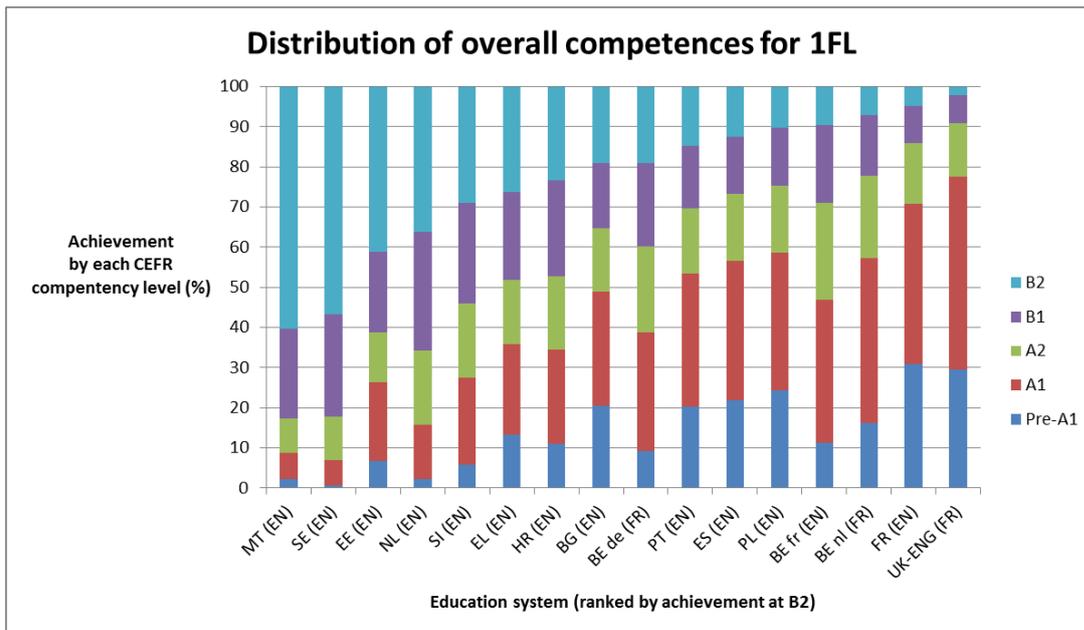
This means that in most countries significant proportions of students are achieving levels at A2 or below, and in some countries the majority of students are achieving at levels even below A1 (see Figure 67). There are also substantial proportions achieving at the pre-A1 level.

¹⁹⁰ European Commission / Beadle, S. & Scott, D. (2014), Languages in Education and Training: Final Country Comparative Analysis. http://ec.europa.eu/languages/library/studies/lang-eat_en.pdf

¹⁹¹ European Commission (2012b), First European Survey on Language Competences, Final report. http://ec.europa.eu/languages/policy/strategic-framework/documents/language-survey-final-report_en.pdf

¹⁹² The ESCL was conducted in 14 countries/regions: BEnl, BEfr, BEde, BG, HR, UK-ENG, EE, FR, EL, MT, NL, PL, PT, SI, ES, SE.

¹⁹³ This is defined as level B1 on the Common European Framework of Reference for Languages.

Figure 67: Competency level distribution in the participating countries

Source: calculations by ICF based on ESLC, 2011

For the second foreign language learnt, on average 26% achieved an independent user level or better. Taking the proportion achieving the level below (A2), this ranges from three countries with more than 60% achieving this (BE-de, BE-nl, NL) to seven with under 33% achieving this (BG, FR, HR, PL, PT, SE, UK England).

Although these results refer to pupils at the end of lower secondary education (age 15) and foreign language proficiency can still improve during upper secondary education, it is highly unlikely given these results that all or even a vast majority of pupils will achieve the targets set by the national guidelines mentioned above by the end of upper secondary education.

While the findings of Section 5.2 imply that employers tend to value oral skills more than written skills, a recent Eurydice study¹⁹⁴ finds that oral skills are the type of language skills least often tested in Europe.

Compulsory education's focus on medium level foreign language skills (B1-B2) and the relatively low share of pupils attaining them implies that the substantial demand for high levels of foreign language skills (C1-C2) in the labour market identified in this study can only be met if skills acquired in school are built upon and increased through language learning in higher education, adult learning, or if language supply is supported by migration.

8.2.2 Language learning in higher education

A recent article in The Times¹⁹⁵ reports that in the UK, enrolment in foreign language degree programmes is decreasing while take up of non-accredited, complementary language courses is increasing, with German among the main beneficiaries. Unfortunately, there is no European level data available on enrolment in programmes leading to a degree in language studies, and non-accredited language courses in higher education.

A major mechanism through which higher education students improve their foreign language skills is cross-border mobility. Eurostat data on mobile students from

¹⁹⁴ European Commission/EACEA/Eurydice (2015), Languages in Secondary Education: An Overview of National Tests in Europe – 2014/15.

¹⁹⁵ The Times, 29.09.2015, Degrees suffer as language courses surge.

abroad¹⁹⁶ shows that in 2013, the UK was by far the most important receiver of European students (about 128,000 students), followed by Germany (86,000), Austria (58,000), France (46,000) and the Netherlands (44,000). The substantial size of these student flows is indicative of the important role mobility in higher education plays in providing individuals with the foreign language skills demanded by the labour market. Mobility in higher education may not only contribute to language learning, but may also help labour markets of receiving countries gain important language skills not provided by the national education system if graduates decide to (temporarily) reside in the hosting state.

8.2.3 Language learning through employer-sponsored adult learning

According to a recent Eurobarometer survey¹⁹⁷ just over half of Europeans (54%) report they are able to hold a conversation in at least one additional language, a quarter are able to speak at least two, and one in ten are conversant in at least three. This has decreased slightly relative to 2005.

Only eight Member States have a majority of respondents who state they are able to speak at least two foreign languages (DK, EE, LV, LT, LU, MT, NL, SI). Nine member states show a significant drop since 2005 (more than 5 percentage points) in the proportion of respondents who state they are able to speak at least two foreign languages (BE, BG, DK, EE, HU, LU, MT, PL, PO).

The survey also shows that:

- The five most widely spoken languages are English (38%), French 12%), German (11%), Spanish (7%) and Russian (5%);
- Under a quarter of foreign language usage is within the workplace which suggests the competence of many may not be used for work or is not sufficient for business purposes;

While the Eurobarometer survey shows that there may be relatively limited language skills among the adult population, the present study finds that employers prefer recruitment over the upskilling of existing staff through employer-sponsored training to satisfy foreign language demand. This is supported by figures from the Continuing Vocational Training Survey from 1999 which found that in European Member States, only about 5% of hours spent in employer-sponsored training are related to the learning of foreign languages.¹⁹⁸

8.2.4 Migration and the supply of foreign language skills

Migration flows of the working age population (15- 64 years of age) in Europe are substantial. Relative to their size, most important destinations of intra-European migration flows were, for example, Austria (52,000), Belgium (50,000), Denmark (19,500), Germany (307,000), Ireland (20,000), the Netherlands (47,000), Sweden (22,000) and the UK (190,000).¹⁹⁹ The origins of migrants are very diverse. Migration into the Netherlands in 2013, for example, originated from all EU Member States. Of the 47,000 European migrants arriving in the Netherlands in 2013, 4% came from the Benelux, 48% originated from Central and Eastern European countries (BG, CZ, EE, HR, HU, LT, LV, PL, RO, SI, SK), 2% from the Nordic countries (DK, FI, SE), 13% from German speaking countries (AT, DE), 21% from Southern European countries (CY, EL, ES, IT, MT, PT), 4% from France and 8% from English speaking countries (IE and

¹⁹⁶ Eurostat (2015), Table [educ_uoe_mobs02], accessed on 29.10.2015.

¹⁹⁷ DG COMM (2012), Special Eurobarometer 386, Europeans and their languages. http://ec.europa.eu/public_opinion/archives/ebs/ebs_386_en.pdf

¹⁹⁸ Continuing Vocational Training Survey (1999), Percentage of the total hours in CVT courses, by field of training and NACE Rev. 1.1 [trng_hour04n], accessed on 29.10.2015.

¹⁹⁹ Eurostat (2015), Table [migr_imm1ctz], accessed on 29.10.2015.

UK).²⁰⁰ Given their dimension and diversity, intra-European migration is likely to have an impact on foreign language skill supply in many European countries.

8.3 Implications for employers and education providers

The following conclusions can be drawn from comparing the supply of people with language competences with the needs of employers and individuals in the labour market. These are set out below.

8.3.1 Employers

Employers expect employees with language skills to improve their competences for higher roles and where their competences do not match the needs of the job on appointment to develop their skills on the job. As a consequence, employers should be expected to **provide off the job training** in language competences. According to this study's findings, only half of employers do this.

In recruiting staff who need foreign language competences, employers are:

- Not often using objective methods to ensure they recruit staff with the level of language skills they need even where the language skills are an important competency in the job;
- Not often specifying the level of language skills they require;
- Not seeking self-reported levels of competences against the CEFR in applications or from Europass cvs;
- Not always aware of the language skills available in the market and levels of competency they should expect from new entrants who have qualifications.

As a consequence, employers could be better aware of good ways of testing potential employees' language skills, the CEFR and how levels of competences can be expressed, and the levels of competency they should expect young people to have reached at the end of different stages/levels of education.

8.3.2 Adult education and continuing VET

Employers require higher levels of language skills for higher roles and require experienced staff as well as new entrants to have language competences for roles. As a consequence, adult learning may help adults to maintain and develop the foreign language competences they acquired at school while they are not using them regularly. This could complement and support the off the job training in language competences which employers should be expected to provide.

8.3.3 Higher education

Employers largely depend on the language competences achieved by new entrants in their compulsory education. The ability to maintain these competences after school and through higher education before joining the workforce are therefore important for businesses needing language skills. As a consequence higher education institutions can help students with language competences to maintain and enhance them when they are not using them regularly in their studies, for example through accredited or non-accredited language training.

Employers require proficiency in English at least at B1 or B2 level, preferably C1 level for a wide range of roles which require graduate level employability skills. As a consequence, vocational and language degree courses should ensure that learners can reach these levels in both oral and written competences.

They also need graduates with competences in a wide range of foreign languages, including smaller European languages such as Slovenian or Swedish, but also non-

²⁰⁰ Eurostat (2015), Table [migr_imm1ctz], accessed on 29.10.2015 and ICF calculations

European languages such as Chinese or Arabic. Vocational and language degree courses should reflect the breadth of need for foreign languages by employers.

Mobility during higher education most likely makes a substantial contribution to the supply of graduates with foreign language skills. Higher education institutions should be expected to support language learning for mobility so that mobile students reach the highest possible levels of foreign language proficiency.

8.3.4 School education and initial VET

Employers largely depend on the language competences achieved by new entrants from completing their compulsory education. As a consequence, the quality of language learning in schools is important for businesses needing language skills. Foreign language education in schools in many countries does not provide large numbers of children with sufficient high levels of language competences.

Employers also:

- Often put a higher value on oral skills and active communication than written skills;
- Very frequently require English as the most useful foreign language (in non-English speaking countries);
- Require proficiency in English at least at B1 or B2 level, preferably level C1 for a wide range of roles;
- Require employees with a range of other useful foreign languages (and employees with more than one foreign language competence) at a similar level of competence to the most useful foreign language. These include German, French, Spanish and Russian.

As a consequence, these need to be reflected in school curricula, timetables, assessment, and awards. Testing is more often focused on writing skills and competences achieved by many children by the time they complete language learning fall short of the level required by employers. The languages which are being taught are not necessarily the languages which are in high demand from employers though teaching two foreign languages helps to meet demand.

Employers require language skills in roles that are filled by individuals with vocational as well as academic qualifications. As a consequence, schools and other providers of initial VET should reflect this in vocational courses for occupations which require these skills. Children studying for vocational qualifications are less likely to be studying a second foreign language or to a higher level.

9 Policy recommendations

This section presents recommendations for the European Commission, national governments and providers of foreign language learning, including employers, based on the conclusions drawn in 8.3. Recommendations are divided between those relating to employment and lifelong learning and those relating to education.

9.1 Recommendations for the support for employers and individuals in the labour market

- Employers should provide off the job training in language competences where employees' competences do not match the needs of the job, or the higher level competences expected for roles they could be promoted to;
- National governments and public employment services should better inform employers about the levels of competency they should expect young people to have reached at the end of different stages/levels of education, so they can design their training policies accordingly;
- National governments, career guidance services and public employment services should inform employees, job-seekers and new entrants about the distinct advantage foreign language skills provide in the labour market and encourage them to take advantage of existing adult learning opportunities to maintain and develop the foreign language competences they acquired at school while they are not using them regularly;
- Similarly, employers should encourage employees to take advantage of existing adult learning opportunities to maintain and develop the foreign language competences they acquired at school while they are not using them regularly.
- The European Commission, national governments and public employment services should better inform employers requiring language skills about language education and the methods of standardised assessment they could use;
- The European Commission, national governments and public employment services should encourage employers to provide certification and documentation of the foreign language skills of their employees, based on training offered or assessment carried out, so this information is available for subsequent employers. Reliable assessment results would presuppose employers' use of formal assessment frameworks, which is not currently the case;
- The European Commission, national governments, and public employment services should promote the use of the CEFR among employers as a readily available tool which can help expressing and documenting work related foreign language needs;
- The European Commission, national governments, public employment services and employers should promote the use of the CEFR among job seekers as a readily available (self-assessment) tool which can help provide employers with relevant information on foreign language proficiency acquired at school or during previous employment.

9.2 Recommendations for the support for schools, IVET and higher education institutions and individuals in education

- National governments should encourage higher education institutions to help students with language competences to maintain and enhance them when they are not using them regularly in their studies, for example through accredited or non-accredited language training;
- National governments should support schools and higher education institutions in making sure that learners can reach independent user (B1 and B2) or proficient user (C1 and C2) levels in both oral and written competences by the time they enter the workforce;

- National governments should support higher education institutions in ensuring that vocational and language degree courses reflect the breadth of need for foreign languages by employers;
- National governments should ensure that employers' needs across all proficiency levels are reflected in school curricula, timetables, and assessment methods with appropriate recognition of oral and active communication skills;
- National governments should ensure that across the school system children are learning a range of foreign languages in addition to English taking account of the demand for most useful and second most useful foreign languages in their country/region;
- National governments should support schools and providers of initial VET to better align language learning with the foreign language needs of occupations they train students for;
- The European Commission and national governments should better inform individuals in compulsory education through careers advice and guidance about the distinct advantage in the labour market of being proficient, but also of having basic or intermediate skills in two foreign languages and encourage them to take advantage of language learning opportunities in school to develop these and to continue to maintain these competences;
- Providers of foreign language training should ensure that the training offers reflect the range of proficiency levels demanded by employers;
- The European Commission should continue to promote the learning of two foreign languages in compulsory education and support initiatives to raise the effectiveness of language learning and teaching.

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TECHNICAL ANNEXES

Annex 1: Selection of business sectors

The need to achieve sufficient interviews and survey responses for analysis to address the research questions, advises the selection of sectors where it is likely to find a need for foreign language skills. These sectors have been identified by the following process:

- The identification of products and services where there is a high level of intra (and/or extra) EU28 trade, based on the assumption that this will lead to a higher need for foreign language skills in related business;
- The identification of large majorities of EU countries which have substantial cross border trade activities and sufficient employment levels in these sectors; and
- A review of the findings of the literature review to check if there is evidence that there is in fact a high demand for foreign language skills in these sectors. The literature review may also reveal reasons to include particular sectors despite relatively low levels of cross border trade.

Identifying products and services with high import/export activity at EU level

The terms of reference suggested that the study should focus on businesses which take part in cross border trade in goods and/or services. To identify these sectors, statistics on international trade and the level of exports and imports of goods and services at EU level can be used.

Annex Table 1 presents Eurostat International trade statistics by product group²⁰¹. All four subgroups of manufactured goods (food, drinks and tobacco; chemicals and related products not elsewhere specified (nes); other manufactured goods; and machinery and transport equipment) show high intra and extra-EU 28 trade levels. This is also true for mineral fuels, lubricants and related materials, and raw materials (including crude agricultural products).

Annex Table 1: Intra and extra-EU trade in the EU-28 by product group, 2014 (in millions of Euro)

	Intra EU28 trade		Extra EU28 trade	
	Import	Export	Import	Export
Food, drinks and tobacco	295,420	302,020	98,320	107,651
Raw materials	107,366	103,402	72,873	43,309
Mineral fuels, lubricants and related materials	230,429	229,781	443,524	109,510
Chemicals and related products nes	475,995	477,357	164,800	278,966
Other manufactured goods	735,395	779,727	407,423	386,793

²⁰¹ Based on the United Nations' Standard International Trade Classification (SITC); <http://unstats.un.org/unsd/cr/registry/regcst.asp?Cl=14>

	Intra EU28 trade		Extra EU28 trade	
Machinery and transport equipment	985,139	1,010,968	450,672	708,973
Commodities and transactions not classified elsewhere in the Standard International Trade Classification	20,574	31,487	42,930	67,652
Total – all products	2,850,318	2,934,742	1,680,542	1,702,854

Source: Eurostat, *Intra and Extra-EU trade by Member State and by product group [ext_lt_intratrd]*, http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=ext_lt_intratrd&lang=en

Eurostat statistics²⁰² also show high intra and extra-EU28 trade levels in the following service sectors: 'other business services'²⁰³, 'travel'²⁰⁴ and 'transportation'. These are followed by 'royalties and licence fees', 'computer and information services' and 'financial services' (see Annex Table 2).

Annex Table 2: International trade in services in the EU-28, 2013 (in millions of Euro)

Current account - services	Intra-EU28 trade		Extra EU-28 trade	
	Credit (exports)	Debit (imports)	Credit (exports)	Debit (imports)
Transportation	155,558.392	146,119.908	140,164.473	115,772.669
Travel	202,603.840	179,053.442	101,214.691	87,375.247
Communication services	24,638.437	21,886.581	20,276.653	16,851.309
Construction services	12,756.733	14,732.011	17,771.364	7,761.826
Insurance services	21,015.329	16,347.875	18,922.953	8,709.119
Financial services	59,620.379	33,318.856	59,154.367	22,802.545
Computer and information	72,778.843	38,286.354	47,317.694	20,308.495

²⁰² Based on the Joint OECD/Eurostat Classifications of Services, <http://www.oecd.org/trade/its/2404428.pdf>

²⁰³ Including 'Merchandising and other trade-related services', 'Operational leasing services', and 'Miscellaneous business, professional, and technical services'

²⁰⁴ 'Travel' covers primarily the goods and services acquired from an economy by travellers during visits of less than one year. It includes 'business' ('expenditure by seasonal and border workers', and 'Other') and 'personal' ('health-related expenditure', 'education related expenditure' and 'other').

	Intra-EU28 trade		Extra EU-28 trade	
services				
Royalties and licence fees	43,910.860	51,229.902	43,921.339	53,398.802
Other business services	228,249.684	216,257.029	219,174.354	145,896.520
Personal, cultural, and recreational services	12,201.975	10,170.703	8,667.063	6,388.008
Government services, n.i.e. ²⁰⁵	7,970.080	11,706.785	7,485.651	5,751.882
Services not allocated	597.374	1,065.897	327.326	347.897
Total – all services	841,901.926	757,282.982	684,397.929	511,239.157

Source: Eurostat, *International trade in services [bop_its_det]*, http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=bop_its_det&lang=en

Variations of import/export activity across countries

For the purpose of this study, the level of trade needed to be relevant for most EU28 countries, i.e. there should be a large majority of EU countries with a substantial amount of cross-border economic activity in the sector. To check if this is the case, Annex Table 3 and Annex Table 4 present the export share of each sector – at the EU-28 level and nationally (only the country with the lowest and the highest share are reported).

Annex Table 3: Share of exports by product 2014. Intra-EU28 trade

Share of exports by product (%)		
	Average EU-28	Variation between countries (range)
Food, drinks and tobacco	10.3%	Minimum: 2.4% in Finland Maximum: 24.2% in Greece
Raw materials	3.5%	Minimum: 0.7% in Malta Maximum: 16% in Latvia
Mineral fuels, lubricants and related materials	7.8%	Minimum: 0.7% in Luxembourg Maximum: 21.3% in Cyprus
Chemicals and related products, n.e.s.	16.3%	Minimum: 4.5% in Romania Maximum: 54.1% in Ireland

²⁰⁵ N.i.e. stands for “not included elsewhere”.

Share of exports by product (%)		
Other manufactured goods	26.6%	Minimum: 9.9% in Cyprus Maximum: 43.1% in Bulgaria
Machinery and transport equipment	34.4%	Minimum: 9.6% in Greece Maximum: 54.2% Slovakia

Source: Eurostat, *Intra and Extra-EU trade by Member State and by product group [ext_It_intratrd]*.

'Machinery and transport equipment' and 'other manufactured goods' seem to be consistently relevant in most countries (minimum shares close to 10%). The export of 'chemicals and related products' is relatively low in some countries (such as Estonia and Romania). Exports of 'mineral fuels, lubricants and related materials' are also proportionately low in many countries. However, where exports have a low share, imports often have a relatively high share. For instance, in Luxembourg and Ireland where there is a low share of exports of these products, they is a high share of intra EU-28 imports (14.1% and 12.7% respectively).

The following table presents data on the six service sectors with the highest trade levels identified above ('other business services', 'travel' and 'transportation', 'royalties and licence fees', 'computer and information services' and 'financial services'). The table also includes 'insurance services' since in the NACE classification it falls under the same category as financial services.

Annex Table 4: Intra EU28 trade in services, 2013 (in million of Euro)

Share of credit (exports) by service		
	Average EU-28	Variation between countries (range)
Transportation	18.5%	Minimum: 4.4% in Luxembourg Maximum: 59.1% in Lithuania
Travel	24.1%	Minimum: 4.2% in Ireland Maximum: 78.1% in Croatia
Insurance services	2.5%	Minimum: 0% in Lithuania Maximum: 11.9% in Ireland
Financial services	7.1%	Minimum: 0.1% in Latvia Maximum: 45.9% in Luxembourg
Computer and information services	8.6%	Minimum: 0.6% in Cyprus Maximum: 46.7% in Ireland
Royalties and licence fees	5.2%	Minimum: 0% in Latvia Maximum: 9.7% in Germany
Other business services	27.1%	Minimum: 7.4% in Malta

Share of credit (exports) by service
Maximum: 43.2% in Sweden

Source: Eurostat, *International trade in services [bop_its_det]*.

Annex Table 4 shows that 'other business services' is present in all EU countries, while 'transportation' and 'travel' are also relevant across the EU although there is a considerable variation in these by country. Their high share in some countries advises their inclusion in the study: namely the high share of credit (exports) concerning 'transportation' in Lithuania, Latvia, Romania, Greece, Estonia, Poland and Cyprus (all over 30%); and the high share of credit (exports) concerning 'travel' in Croatia, Bulgaria, Portugal, Greece, Slovenia, Italy, and Cyprus (all over 40%).

Financial and insurance services show little cross border activity in a few countries:

- Lithuania, Latvia, Estonia, Croatia, Hungary, Poland, Cyprus, Slovakia, Sweden and Romania have a share of less than 1% of credit in insurance services;
- Latvia, Czech Republic, Slovenia, Croatia, Finland, Lithuania, Slovakia, Greece and Hungary have a share of less than 1% of credit in financial services.

These services however have a high share in a few countries; for example, financial services are 45.9% of the credit (exports) in Luxembourg.

Similarly, 'computer and information services' have a low share in countries such as Cyprus, Croatia, Greece, Slovenia, Malta and Lithuania (shares under 3%), while they are quite relevant in other countries, most significantly in Ireland (46.7%), Finland (20.8%) and Romania (11.2%).

In the case of 'royalties and licence fees' 13 of the countries with available data have shares of less than 1% and only three countries have shares over 4% (United Kingdom, Sweden and Germany). This activity will therefore be excluded.

Proposed list of economic sectors for research

As a result of the analysis above, the following NACE sectors were included in this study. All sectors listed have been checked for their relevance in each country in terms of the number of enterprises, employment levels and job vacancy rates on the basis of Eurostat data. The result of this check was generally positive and did not warrant excluding any of these sectors in certain countries.

Five sectors identified as most relevant:

Manufacturing (NACE C)

The manufacturing sector is very significant in intra and extra EU28 trade (Eurostat), and the PIMLICO study showed that the share of SMEs which export is high in manufacturing (56%). In line with the data on level of international trade, the literature suggests a high need for foreign languages in the industrial sector– of which manufacturing makes up a large proportion.²⁰⁶ For instance, the Eurobarometer on employers' perception of graduate employability²⁰⁷ found that recruiters in the industrial sector were most likely to highlight the importance of foreign language skills when recruiting higher education graduates. Also, a survey in Spain conducted by the consultancy Adecco Professional found that there was a high demand for foreign

²⁰⁶ It should be noted that the term "industry", encompasses several NACE level 1 codes: 'Mining and quarrying', 'Manufacturing', 'Electricity, gas, steam and air conditioning supply', and 'Water supply; sewerage, waste management and remediation activities'.

²⁰⁷ DG COMM (2010), Flash Barometer 304, Employers' perception of graduate employability, Analytical report. http://ec.europa.eu/public_opinion/flash/fl_304_en.pdf

languages in industry.²⁰⁸ Similarly, an Austrian study reports the manufacturing industry to be one of the sectors with the highest demand for foreign language skills.²⁰⁹

In principle, the size of the manufacturing sector and its high level of cross border trade would allow for a breakdown of manufacturing in NACE level 2 categories, such as 'manufacture of machinery and equipment'. This was not done as previous studies focus on the manufacturing sector as a whole, and as they find that businesses in manufacturing all use languages for relations with suppliers, rather than communication with customers and partners.²¹⁰ This suggested that defining subsectors for manufacturing was not necessary for the purposes of this study and remaining at NACE level 1 would ensure consistency and comparability with previous studies.

Transportation and storage (NACE H)

The level of intra and extra EU28 trade in this type of economic activity is high, and 39% of SMEs engage in cross border activities (PIMLICO study). Moreover, transportation and storage represents a high share of intra-EU credit (exports) in several countries.

There is also evidence in the literature that this is an area where there is a need for foreign language skills. According to a study by UCML in the UK, one of the sectors where the need for languages is likely to be most critical was 'Transport, storage and communications'²¹¹. Similarly, an Austrian study reports transport services to be one of the sectors with the highest demand for foreign language skills.²¹²

Accommodation and food service activities (NACE I)

The category 'Travel'²¹³ has a strong presence in intra and extra EU28 trade. At the same time it represents a high share of intra-EU credit (exports) in several countries. Both the UCML study and the Austrian study identify 'Hotels and catering' as one of the sectors with a stronger need for language skills at all levels.

Wholesale and retail trade; repair of motor vehicles and motorcycles (NACE G), and Professional, scientific and technical activities (NACE M)

Both the wholesale trade sector and professional, scientific and technical activities are contained in the SITC category 'other business services' (Eurostat) which accounts for a large portion of intra and extra EU28 trade. Also, the PIMLICO study highlights wholesale trade, sales of motor vehicles and research as three of the areas with the highest share of exporting SMEs (54%, 53%, and 54% respectively).

The literature finds demand for foreign language proficiency to be high in both sectors. The UCML study in the UK which investigated demand through an analysis of job postings, a survey of recruitment agencies, and interviews with employers, found that

²⁰⁸ ADECCO Professional (2013). *Encuesta Adecco profesional sobre exigencia de idiomas*.

²⁰⁹ Institut für Bildungsforschung der Wirtschaft (2008), *Fremdsprachen für die Wirtschaft*. <https://www.hueber.de/sixcms/media.php/36/Unternehmen.pdf>

²¹⁰ DG EAC (2011), *Report on language needs in business*, CELAN Network Project. http://www.celan-platform.eu/assets/files/D1.3-Business_Needs_Report-Final.pdf

²¹¹ Tinsley, T., *Languages: the State of the Nation - Demand and supply of language skills*, Alcantara, 2013.

²¹² Institut für Bildungsforschung der Wirtschaft (2008), *Fremdsprachen für die Wirtschaft*. <https://www.hueber.de/sixcms/media.php/36/Unternehmen.pdf>

²¹³ The Standard International Trade Classification (SITC) category 'Travel' used for the compilation of trade data corresponds closely to the NACE classification I 'accommodation and food service activities'.

vacancies in sales and trading often required language skills.²¹⁴ However, while language skills demand in wholesale trade and sales of motor vehicles is often reported to be high, it has been found to be relatively low in retail trade²¹⁵.

As regards 'professional, scientific and technical activities', Tinsley (2013) identifies 'professional and business services / marketing and PR' as one of the sectors where there is a stronger need for language skills.

²¹⁴ Mulkerne, S and Graham, A., *Labour Market Intelligence on Languages and Intercultural Skills in Higher Education*, Universities Council of Modern Languages, 2011.

²¹⁵ Institut für Bildungsforschung der Wirtschaft (2008), *Fremdsprachen für die Wirtschaft*. <https://www.hueber.de/sixcms/media.php/36/Unternehmen.pdf>

Annex 2: Summary of the literature on the demand for foreign language skills in the labour market

Annex Table 5: Summary of the literature on the demand for foreign language skills in the labour market

Study	Purpose	Methodology	Scale	Findings
CBI/Pearson Education and Skills survey (2015)	Identify skills needs of UK employers.	Survey conducted in Spring 2015	Useable responses received from about 300 employers.	<p>46% of employers value foreign languages.</p> <p>Use of languages mainly in relationships with clients, customers and suppliers, staff mobility within the organisation, facilitating international working.</p> <p>European languages on top (led by German and French, followed by Spanish), but also Chinese and Middle East languages, reflecting the predominance of business with these countries.</p> <p>Over half of employers were not satisfied with young people's foreign language skills.</p>
Lemp – <i>Langues et employabilité</i> project (2015)	Analyse the needs of French employers with regard to foreign language skills.	The study involved an online questionnaire targeting enterprises, semi-structured interviews with employers and an analysis of job offers.	The questionnaire was responded by 801 enterprises (during the period July to October 2014). Researchers conducted 14 semi-structured interviews in December 2014. They analysed one sample of 801 general advertisements (not necessarily with linguistic requirements) and another sample of 728 advertisements where at least one language was required.	<p>Half of the companies demand competences in foreign languages when recruiting. All other things being equal, foreign language knowledge makes a difference.</p> <p>English prevails as most demanded language. It is followed by German, Spanish and Italian. A total of 21 (survey) or 22 (vacancy review) different languages</p>

Study	Purpose	Methodology	Scale	Findings
				<p>were mentioned by enterprises.</p> <p>Two advertisements in five required competences in two foreign languages.</p> <p>Two thirds of the companies used the interview in foreign language to test the candidate's language level. Half of the enterprises reported that they often take into account experiences of international mobility when recruiting.</p> <p>Half of the companies mentioned that foreign language competences have positive effects in employers' career contributing to promotion, mobility and remuneration (survey). Foreign language skills increase the chances of getting a stable and better remunerated job (vacancy review).</p> <p>Foreign language skills are more often demanded in the case of management positions (57% and 59%) followed by technicians (48% and 41%) and other workers (8%).</p> <p>Foreign languages are mostly used in sales-market research (61%), services to clients (51%), and purchase (45%).</p> <p>The language level demanded increases with the qualification</p>

Study	Purpose	Methodology	Scale	Findings
				<p>level of the job position, the education level required, and the years of work experience.</p> <p>The majority of companies demand both oral and written skills.</p> <p>Around 70% of the companies' respondents believe that having employer with language skills is an asset to the company.</p> <p>A third of the enterprises report difficulties to recruit candidates with the needed language competences.</p> <p>Close to a quarter of the firms organise training in foreign languages for their employers.</p>
Araújo et al / CRELL (2015)	Provide new evidence on the foreign language competences of European citizens and the relationship between foreign language skills and the likelihood of being in employment.	It involves a secondary analysis of the Adult Education Survey (AES 2011) to: analyse how many languages adults know and their proficiency level in the two best known languages; and to examine the relationship between language knowledge and employment status.	The analysis involves 24 Member States, excluding UK (information on foreign languages not collected), RO (high non-response rate) and IE (high share of missing information on employment status). The sample is of 120,597 individuals aged 25-64.	<p>Across EU Member States, the number of languages known increases with the level of educational attainment.</p> <p>In 17 Member States knowing one foreign language, two or more and/or being proficient in the best known languages is positively related with employment chances.</p> <p>Adults who know one or more foreign languages are more likely to be employed than those who do not know any foreign language. This relationship holds true even for</p>

Study on Foreign Language Proficiency and Employability

Study	Purpose	Methodology	Scale	Findings
				<p>basic competences.</p> <p>Being proficient in at least one of the two best known foreign languages is positively associated with employment chances in 6 Member States.</p>
British Academy / Tinsley (2013)	Achieve a greater understanding of strategic deficits in language learning and how best they might be addressed.	The study involved the review of evidence base on the supply and demand for language skills across the UK. It also included a survey of employers known to be using languages in their work, and an analysis of vacancy notices including languages.	<p>The survey received responses from 57 employers.</p> <p>The analysis of advertisements for jobs involving knowledge of foreign languages was carried out during the period June to September 2012 and is based on over 1,000 vacancy notices posted on 4 job sites.</p>	<p>French, German, and Spanish, account for around half of the demand of foreign language skills. Mandarin, Arabic and Russian (and to a lesser extent Turkish, Farsi and Polish) are also in demand.</p> <p>'Accounts', 'marketing or PR' and 'sales' positions commonly require languages in vacancy notices.</p> <p>Sectors with more need for languages: Creative industries; Education; Finance; IT; Professional and business services / marketing and PR; Hotels and catering; Transport, storage and communications.</p>
Tinsley & Board (2013) (UK)	Provide a strategic analysis of the UK's long-term language needs.	The study identifies a number of criteria to help prioritising languages including 'the language needs of UK business' based on the Confederation of British Industry's 2013 <i>Education and Skills Survey</i> .	The Confederation of British Industry's (CBI) 2013 <i>Education and Skills Survey</i> received responses from 294 employers.	<p>70% of responding businesses value language skills among their employees, particularly in helping to build relationships with clients, customers and suppliers.</p> <p>French, German and Spanish are the most important for firms.</p>

Study on Foreign Language Proficiency and Employability

Study	Purpose	Methodology	Scale	Findings
Humburg, van der Velden and Verhagen (2013) / European Commission	Analyse the employer's perspective on what makes graduates employable.	The study's methodology includes a 'conjoint study' (simulation of selection process with hypothetical candidates); in-depth interviews with employers and a focus group of stakeholders in 12 European countries.	The conjoint study gathered responses from 903 employers in nine European countries.	<p>When reviewing CVs, employers pay most attention to: graduates' field of study, followed by the amount of relevant work experience, and by graduates' degree level and grade point average. The relative importance of experience of studying abroad is lower than that of the previous attributes.</p> <p>Employers' associate study experience abroad with: 1. candidate's advanced international orientation and language skills; and 2. willingness to deal with new situations, to take risks and to be open to new experience.</p> <p>According to the in-depth interviews, international orientation (proficiency of foreign languages and intercultural skills) is a tipping factor rather than a make or break in the hiring process.</p>
CELAN project (2011)	Identify language needs in the business community in Europe.	Consultation from March to June 2011 through a paper and web-based questionnaire.	<p>543 responses from firms in 29 European countries.</p> <p>157 responses from representative organisations across Europe.</p>	<p>90% of businesses value foreign languages.</p> <p>Use of languages mainly in sales, marketing, exports.</p> <p>Mainly European languages.</p>
Universities Council of Modern Languages / Mulkerne & Graham (2011)	Quantify the job market for graduates with language skills, and establish a value for	Research and analysis of job postings on major online employment websites; survey	The job posting review included 2,853,840 positions in <i>Indeed</i> (76,374 with language needs)	Most vacancies requiring language skills were in sales and trading, IT and technology,

Study on Foreign Language Proficiency and Employability

Study	Purpose	Methodology	Scale	Findings
	language learning in higher education.	of recruitment agencies specialising in language recruitment; and interviews with employers in a variety of sectors.	and 15,640 in <i>Telegraph jobs</i> (234 with language needs). Online survey sent to about 15 recruitment agencies from November 2010 to January 2011. 4 replies received. Number of interviews not specified.	and administrative, finance, and project management roles. Employers felt that languages provide graduates with a means of advancing their careers by contributing to business development and international relationship building.
2011 PIMLICO project	Analyse language management strategies in European small and medium-sized enterprises.	The study focuses on identifying and describing models of best practice in European SMEs selected by their significant trade growth thanks to formulating and employing language management strategies.	182 SMEs were initially identified from the 27 Member States. 40 case studies were found to be models of good practice using a language management strategy.	Employees of international businesses who are engaging in client, customer or supplier relations are expected to have <i>fluency</i> , characterised by the ability to negotiate in at least three foreign languages, one of which is invariably English.
2010 Eurobarometer	Provide insights into the needs and perceptions of graduate recruiters.	Interviews conducted with senior staff in companies in the private and public sector, excluding the agriculture and educational sector, with at least 50 employees across a range of business.	7,036 interviews conducted in August and September 2010, covering the 28 EU member states, Norway, Iceland and Turkey.	Compared to all skills and capabilities (e.g. the ability to work in a team or computer literacy), employers were least likely to highlight the importance of foreign language skills. One-third also said that foreign language skills were 'rather unimportant' or 'not at all important'. Individual country results show a varied picture (lower value in UK, IE and FR; higher value in LU, HR and CY). The proportion reporting that foreign language skills are 'rather important' or 'very important' were: Industry – 78%; Trade, accommodation

Study on Foreign Language Proficiency and Employability

Study	Purpose	Methodology	Scale	Findings
				<p>and food services – 64%; Non-public services – 63%; Construction, transport, ICT – 62%; Public services – 49%.</p> <p>Graduate recruiters in medium-sized companies were more likely to highlight the importance of foreign language skills than large companies.</p> <p>31% of respondents said that foreign language skills will be among the most important skills and competences for higher education graduates in the next 5-10 years. However, other skills ranked more highly.</p> <p>Employers remain least satisfied with the foreign language skills of higher education graduates hired in the past three to five years, compared to other skills and capabilities.</p>
Grin, F., Sfreddo C. & Vaillancourt, F., (2009)	Examine the economic effects of languages	The study develops an algebraic model of the role of languages in the microeconomic theory of production. It also creates a model for the recruitment of staff which takes into account the linguistic profile of the position and that of the candidate. Researchers also analyse quantitative data from the Federal Statistical Office and other sources, and	The survey was applied in two waves (Autumn 2007 and Spring 2008). 3,494 questionnaires were sent and 205 were completed (response rate of 5.87%).	<p>Language skills are important also in purchase departments (not less than in sales). Since purchase is present in all the enterprises, multilingualism is relevant for all the companies and not just those focused on exports.</p> <p>The demand of multilingual workers it is twice less sensitive to salary variations than that of unilingual workers.</p>

Study on Foreign Language Proficiency and Employability

Study	Purpose	Methodology	Scale	Findings
		conduct a survey targeting companies from the industrial sector in the French-speaking and German-speaking Switzerland.		The authors estimate that multilingualism adds around 10% to Swiss GDP.
Tritscher-Archan / Institut für Bildungsforschung der Wirtschaft (2008)	Achieve a greater understanding of foreign language education in schools and colleges, and language needs in Austria and Germany.	Anthology gathering research and discussion processes, including 14 contributions.	Inter alia online survey among 2017 Austrian companies in 2005.	<p>The demand for foreign language skills increases with firm size.</p> <p>Sectors with more need for languages: Manufacturing industry, tourism, accommodation and food services, transportation, wholesale and foreign trade, and financial services.</p>
Higher Education Funding Council for England HEFCE (2008)	Describe the characteristics of graduates from UK higher education and their progression into work or further study six months, and three and a half years, after graduation and identify what effect the choice of subject has on their early careers.	The study uses graduate responses from 'Destinations of Leavers from Higher Education' (DLHE) survey conducted by the Higher Education Statistics Agency (HESA). The survey collects information about patterns of employment and further study or training. Data are drawn from the HESA individualised student records from 2002-03 to 2005-06.	<p>The DLHE had a total sample of 287,843 graduates. 202,470 responded to the survey. It was conducted in 2002-03 (six months after graduation).</p> <p>The Longitudinal DLHE (LDLHE) used a sub-sample of the above.</p> <p>37,128 graduates were selected to take part in the LDLHE. Of these 15,050 responded to the survey. The survey was conducted in 2005-06 (3.5 years after graduation).</p>	<p>Six months after graduation, 93% of modern foreign language graduates were either employed or in study (73% employed; 20% in study). The percentage is similar to the one of other first-level graduates (the overall percentage is of 93%).</p> <p>3.5 years after graduation the percentage for modern foreign language graduates is of 98% (89% and 8%), also similar to that of other graduates (the overall percentage is of 97%).</p> <p>The mean salary of graduates in modern foreign languages six months after graduation is of £14,787 a bit higher than the combined mean salary of all</p>

Study on Foreign Language Proficiency and Employability

Study	Purpose	Methodology	Scale	Findings
				<p>graduates (£13,545).</p> <p>Three-and-a-half years after graduation, the mean salary of graduates in modern foreign languages is of £26,823, higher than the combined mean salary of all graduates (£22,912) and that of for graduates in Chemistry, Physics, Engineering, or Mathematical sciences.</p>
<p>Ginsburgh, V. & Prieto-Rodriguez, J. (2011)</p>	<p>Estimate the returns to languages in nine EU countries.</p>	<p>The study uses the European Community Household panel Survey for the period 1994–2001, to infer returns to non-native languages by native workers in nine countries of the EU.</p>	<p>The total sample was 12,933 workers. Sample sizes vary across countries and years. It covered 9 countries: AT, DK, FI, FR, DE, EL, IT, PT, and ES.</p>	<p>Positive effect of foreign language proficiency used at the workplace on earnings, in all nine countries.</p> <p>In Northern Europe, English provider larger returns. In DK, given that many Danes are fluent in both English and German, returns to the two languages are lower than in the three other Northern European countries. Authors conclude that more language education may thus eventually crowd out private returns.</p> <p>In Southern European countries, though English is also the most used language by firms, other languages may also be better rewarded (especially French).</p>
<p>ELAN study (2006)</p>	<p>Provide practical information and analysis of the use of</p>	<p>It includes: summary of literature on the linkage</p>	<p>Survey of nearly 2,000 exporting SMEs across 29</p>	<p>English prevails, but other languages are also used</p>

Study on Foreign Language Proficiency and Employability

Study	Purpose	Methodology	Scale	Findings
	<p>language skills by SMEs and the impact on business performance.</p>	<p>between language skills, cultural competence and exporting performance; survey of Exporting SMEs; for each country, a review of the findings by five 'influencers'; a survey of thirty multinational companies; and a macro-economic analysis of the SME survey data.</p>	<p>European states (EU, EEA and candidate countries) and a survey of 30 multinational companies.</p>	<p>(mainly, German, French, Russian, and Spanish). Most widely spoken languages are often used as <i>intermediary languages</i>. Employers also value languages of neighbouring EU countries.</p> <p>Large companies are more likely to recruit language-skilled workers than SMEs.</p> <p>Foreign language skills are mostly required for management positions, but also technicians. They are less important for shop floor workers.</p>
<p>Didiot-Cook, Gauthier & Scheirlinckx (2000)</p>	<p>Improve match between the actual use of foreign languages at work and the training of future managers within the programme of the Community of European Management Schools (CEMS).</p>	<p>Combination of a quantitative analysis of internships evaluation forms of students from the CEMS and semi-structured interviews with company representatives from the UK, Germany, Belgium, and Netherlands.</p>	<p>Analysis of eighty-eight forms dated from 1993 to 1998</p> <p>34 semi-structured interviews.</p> <p>The project lasted from February to March 1998.</p>	<p>The most demanded language was English.</p> <p>Employers demanded at least an advanced level of English. Oral skills were more valued. Reading and writing were more often required in consulting and finance than in other sectors.</p> <p>A second foreign language either required or a major plus. The language level can usually be lower than the one for English, but not when dealing with clients.</p> <p>When screening CVs, companies tend to ask for a proof of language proficiency such as long stays abroad,</p>

Study on Foreign Language Proficiency and Employability

Study	Purpose	Methodology	Scale	Findings
				standardised tests, exchange programmes, internships, professional experience, or post-graduate degrees. Foreign language proficiency is then also tested in the job interview or, if needed or available, assessment centres.

Annex 3: Descriptive statistics of data collected

Data from interviews with employers

Please note that the number of total observations included in the data set is 660, which is more than the number of interviews conducted (645). This is because in some cases interviewees provided information on more than one job vacancy (2 employers in Estonia and 9 in Italy provided information on 2 or 3 job vacancies).

Annex Table 6: Number of observations by sector, interview data

Sector	Number of observations
Accommodation and food service activities	121
Manufacturing (industry sector)	142
Professional, scientific and technical activities	140
Transportation and storage	126
Wholesale and retail trade; repair of motor vehicles and motorcycles	131
Total	660

Annex Table 7: Number of observations by business size, interview data

Business size	Number of observations
Large (249<)	239
Medium (50-249)	189
Small (1-49)	228
Missing	4
Total	660

Annex Table 8: Number of observations by work experience required, interview data

Work experience required	Number of observations
Labour Market Entrant (0-1 year of experience)	197
Early career (2-5 years of experience)	335
Mid career (6-15 years of experience)	106
Later career (15< years of experience)	8
Missing	14
Grand Total	660

Annex Table 9: Number of observations by level of education required, interview data

Education required	Number of observations
Higher education degree	321
Other	326
Missing	13

Grand Total	660
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Annex Table 10: Number of observations by positions that desire or require foreign languages, interview data

Desired/Resired	Number of observations	
	1 st Foreign language	2 nd Foreign language
Desired	89	360
Required	571	154
Grand Total	660	514

Data from review of online vacancy notices**Annex Table 11: Number of vacancy notices reviewed by sector**

Sectors	Number of vacancies
Accommodation and food service activities	688
Manufacturing (industry sector)	722
Professional, scientific and technical activities	830
Transportation and storage	677
Wholesale and retail trade; repair of motor vehicles and motorcycles	715
Total	3632

Annex Table 12: Number of vacancy notices reviewed by work experience required

Work experience required	Number of vacancies
Labour Market Entrant (0-1 year of experience)	947
Early career (2-5 years of experience)	1537
Mid career (6-15 years of experience)	329
Later career (15< years of experience)	18
Missing	801
Total	3632

Annex Table 13: Number of vacancy notices reviewed by level of education required

Level of education required	Number of vacancies
Higher education degree	1520
Other	1612
Missing	500
Total	3632

Annex Table 14: Number of vacancy notices that require/desire a second or third foreign language

Required/not required	Number of vacancies		
	1 st language	2 nd language	3 rd language
Desired	396	710	246
Required	3041	674	84
Total required or desired	3437	1384	330
Description in vacancy too unspecific to determine whether required or desired ²¹⁶	195	129	20
Total mentioned	3632	1513	350
Not required or desired	0	2119	3282
Total	3632	3632	3632

Annex Table 15: Number of vacancies by foreign language and the level required/desired

Level	Number of vacancies					
	1 st language		2 nd language		3 rd language	
	Oral	Written	Oral	Written	Oral	Written
High (C1-C2)	1627	471	333	90	50	11
Medium (B1-B2)	1074	302	316	73	62	16
Low (A1-2)	149	64	81	36	33	9
Total Specified	2850	837	730	199	145	36

Note: If no distinction between oral and written was made in the vacancy notice, only an oral level was assigned.

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