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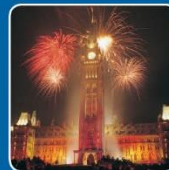
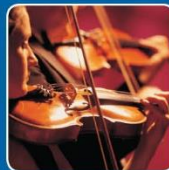
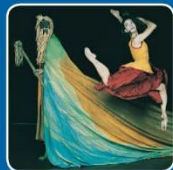
Canada



Economic Advantages of Bilingualism

Literature Review

May 2016



The findings in this research project and the proposed orientations do not necessarily represent the policies or the views of the Government of Canada

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1. EXECUTIVE SUMMARY

Fostering the learning and use of Canada's two official languages has been an objective of the Government of Canada for over forty years. The argument for bilingualism in Canada has traditionally been made on historical grounds based on a compact between English and French Canada entrenched in the 1867 Constitution Act. This cornerstone led to the establishment, *inter alia*, of minority language schools, and eventually a bilingual federal public service and the Official Languages Act of 1969.

Today, based on the international academic evidence, the argument for bilingualism can be made not only on historical grounds but also on social and economic terms showing across-the-board benefits of bilingualism for all Canadians: individuals, employers, sectors and the country as a whole.

The literature review in this paper provides a multidisciplinary approach to bilingualism in Canada and around the world, synthesizing key findings of over 80 Canadian and international academic studies and policy papers. Findings cover the cognitive and psycho-social skills, so-called "soft skills" of bilingualism, as well as the "hard", technical language skills, using three levels of economic indicators: micro-, meso- and macro-economic.

There are other, competitive, reasons to pursue bilingualism. The impact of globalization and the implementation of new free trade agreements, such as the Comprehensive Economic and Trade Agreement (CETA) between Canada and the European Union (EU) and the Trans-Pacific Partnership Agreement, require Canada to use all the assets at its disposal, including bilingualism, to stay ahead of worldwide competition and capitalize on Canada's unique value proposition.

THE EVIDENCE

The evidence is compelling and found world-wide: bilingualism confers both social and economic advantages. Research spanning many countries showed complementary findings between Canadian and international studies.

INDIVIDUAL MICRO-ECONOMIC BENEFITS

Findings show that Canadians, Americans and Europeans from all walks of life benefit from bilingualism and acquire economic, cognitive and social advantages. Academic studies prove that bilingualism directly benefits individuals by increasing their earnings relative to their peers, their job opportunities and labour mobility, and their chances at promotion to higher levels.

INDIVIDUAL COGNITIVE AND PSYCHO-SOCIAL BENEFITS

The evidence demonstrates that bilingual individuals enjoy increased mental adaptability; greater attention to detail; improved listening skills and social communications skills, and enhanced cross-cultural awareness.

MESO LEVEL BENEFITS ACCRUING TO EMPLOYERS AND SECTORS

Employers and companies also realize economic gains. Study results reveal that even unilingual workers in a company benefit because bilingualism enables a company to grow beyond its local market to other parts of the country and provides a springboard to other languages and international markets. This directly leads to the creation of additional, unilingual jobs.

The evidence demonstrates that employers pay bilingual employees higher wages; employ bilingual employees in more diverse functions and sectors than is generally recognized (e.g., finance, engineering); value a combination of cross-cultural and

communications skills, international experience and moderate language skills; and often use virtual teams of employees spanning many countries, all bringing their own skills, perspectives and cultures.

MACRO-ECONOMIC BENEFITS FOR THE ECONOMY

Studies on the effects of bilingualism and globalization demonstrate that Canada has competitive reasons to pursue bilingualism. To remain competitive in the global marketplace, Canada needs to match what its competitors are doing - either on an individual or company level, or as a matter of public policy, such as in the European Union (EU).

When bilingualism reaches a sufficient scale, as in Quebec and New Brunswick, it expands the regional economy, making it an economic imperative for the province and the country. Swiss and Canadian evidence show a positive relationship between bilingualism and GDP.

THE POLICY CONSIDERATIONS

Based on these findings, this paper offers Canadian public and private sector policy-makers a strategic approach to maximize the benefits for Canada. Potential policy avenues are provided to inform stakeholders to consider taking action and are presented under three categories or pillars: 1) Promoting Business Use of a Second Language, 2) Jobs and Hiring, 3) Education and Training.

Pillar 1 – Promoting Business Use of a Second Language

Building awareness of the benefits of second language skills and facilitating its use in business is essential, such as by: inviting large corporations with bilingual workforces to model second language skills use to small business; encouraging dialogue, such as through business roundtables, to share best practices; and developing tools, such as a language user's guide for small business.

Pillar 2 – Jobs and Hiring

To support greater use of bilingualism in hiring and employment, the following could be considered: creating a second language work experience program, e.g., student internships in a second language to assist a new exporter with a foreign market, and matching immigrant language skills with the needs of business and professions.

Pillar 3 – Education and Training

Second language skills are a strategic asset once in the workforce. Some initiatives to consider: increase second language learning and mother tongue instruction in schools and post-secondary education; facilitate online language learning for working adults (Government of Canada commitment); provide career counselling for jobs using language skills. Another option to consider is to establish a Canada-wide academic standard for second language skills that is accepted across all jurisdictions. Certain provinces have started adopting the Common European Framework of Reference for Languages (CEFR) as their academic standard.

Due to the complexity and breadth of the evidence of the economic benefits of bilingualism, a comprehensive, strategic approach will allow Canada to best capitalize on its strengths as a bilingual, multicultural society.

2. INTRODUCTION

Countries world-wide are experiencing the effects of globalization, which has led to social and economic change in many nations. It has also had direct implications for the language practices of businesses world-wide.

Individuals and global businesses now need additional foreign language skills in the workplace to remain competitive. One international study reports that individuals are meeting the demand by learning third and fourth languages.

Canada is not sheltered from the demands of the global landscape. Canada ranks 17th among the world's 30 largest trading nations with trade representing 63% of Canada's gross domestic product.¹ A recent Conference Board of Canada study reported that services play an increasingly important role in the Canadian economy, representing 44% of exports, with banking and insurance, trade and transport topping the list of service sectors.² Many services are heavily language-based, providing another reason to focus on second language skills.

Possessing two official languages provides Canada with economic benefits as a trading nation, as the research in Canada and elsewhere demonstrates.



Competitiveness has become even more critical to our growth and prosperity....Smart companies should consider moves into new markets now while competitors are still sitting on the fence, particularly in the U.S., and ahead of the new competition that will be coming in a few years' time from free trade agreements with the European Union and Pacific Rim countries.

- *Peter Hall, Vice President and Chief Economist, Export Development Canada
Crystal Ball Report: Canada In A Volatile World, Economic and Political
Outlook for 2016-2017, Canadian Chamber of Commerce, January 2016: 7.*



3. CONTEXT

GLOBAL DIMENSION

With the global economic downturn starting in 2008, and faltering demand in the slow-growth traditional markets of Europe and North America, business attention is now on growing emerging markets to sustain demand for products and services. These include the rising middle class of the BRICS (Brazil, Russia, India, China and South Africa) and the Next-Eleven – MIST nations (Mexico, Indonesia, South Korea and Turkey).

In Europe, the fall of the Berlin Wall in 1989 precipitated a new political and economic relationship with Central and Eastern Europe and resulted in a greater use and diversity of foreign languages. Many former Soviet Bloc countries have since negotiated entry into the European Union (EU), prompting recognition of their national languages as official languages of the EU. In response, regional linguistic groups in Western Europe demanded and received increased recognition, e.g., Catalan, Galician, Welsh and Breton.

However one study noted that Europe is running the risk of losing its competitive edge, particularly against emerging economies of Asia and Latin America which are rapidly acquiring foreign language skills.

¹ Canada's Trade and Investment Update 2014, Foreign Affairs and International Trade Canada, 2014.

² Spotlight on Services in Canada's Global Commerce, Conference Board of Canada, August 5, 2015.

This strategic market expansion has immediate implications for foreign language requirements in companies. It also influences the choice of a second language for study. On top of the languages traditionally selected for second language skills (SLS), particularly French, English, German, Spanish and Italian, are courses in Chinese and other Asian languages, as well as Russian, Portuguese, Arabic and others.

These emerging language requirements are not replacing the traditional second language training; rather they are added to the list as a third or fourth language to acquire (Tinsley 2013: 56). Companies are seeking to develop a flexible and diverse workforce, with a range of language skills and global experience that can be easily dispatched when and where needed.

CONSTITUTIONAL DIMENSION

The global economic pressures motivating greater use of second language skills (SLS) or foreign language skills (FLS) combines with additional historical pressures in the Canadian context which led to the establishment of English and French as Canada's two official languages. The constitutional foundations recognizing French and English as the official languages of Canada were laid in the Constitution Act of 1867, Section 133, and in the Canadian Charter of Rights and Freedoms of 1982, Sections 16 – 23.

Part VII of the Official Languages Act (OLA), added in 1988, commits the Government of Canada to enhancing the vitality of the English and French linguistic minority communities in Canada and fostering the full recognition and use of both English and French in Canadian society. Part VII of the OLA was reinforced in 2005. Under Section 41.2 every federal institution has the obligation to implement "positive measures" in support of these commitments. Under section 42, the Minister of Canadian Heritage and Official Languages is responsible for coordinating the Government approach and under section 43 with taking positive measures to advance the equal status and use of French and English in Canadian society.

Many federal departments and agencies with economic portfolios could benefit from better understanding the economic advantages of bilingualism to assist them in carrying out their Part VII commitments, as could those with social mandates as they address labour market policy issues related to workforce skills and readiness.

POLICY DIMENSION

The relationships between second language skills, business and employability are valid areas of enquiry in the Canadian context. Along with Indigenous Canadians and Anglophones and Francophones, Canada welcomes immigrants from all parts of the world who speak many languages. They are a rich source of language knowledge and often maintain social and commercial ties with their countries of origin.

The Government of Canada is committed to encouraging and promoting the use of Canada's official languages, particularly in regards to:

- Developing a new official languages plan to support English and French linguistic minorities;
- Ensuring that all federal services be delivered in full compliance with the Official Languages Act;
- Establishing a free, online service for learning and retaining English and French as second languages; and
- Making new investments to support CBC/Radio-Canada, a vital national institution that brings Canadians together, promotes and defends the country's two official languages, and supports Canada's shared culture.

On July 22, 2015, the Government of Canada tabled its response to the Parliamentary Report on The Economic Situation of Official Language Minority Communities (OLMCs), and declared that one of its four guiding principles in supporting the economic development of OLMCs was the promotion of the economic advantages of bilingualism. The Government considers bilingualism a

strategic asset for both local and regional economies and for international trade. Sharing a language promotes understanding and cements collaboration, which are powerful economic levers. The de facto bilingual nature of OLMCs is an inherent advantage for their economic development, as is supported by the research.

A large number of studies examining the cognitive and socio-economic effects of bilingualism, at the individual, business or national scale, have been published which support the aspirations in the OLA and in the Parliamentary Report. One of the defining challenges of OLMCs is that, as individual members prosper economically, the socio-cultural fabric of the OLMC is not necessarily strengthened.

Promoting the use of English and French in Canadian society includes the economic and employment dimension, which plays a large part of the working lives of Canadians, as both actors and consumers. Prior to their working years, their years in the education system are also spent in large part preparing to be contributing members of society. The ability to speak English or French or both impacts the lives of Canadians and the country as a whole from both a social and economic perspective. Learning a second official language then leads us to consider whether there are jobs available to exploit this advantage once in the workforce. This is a policy issue to be considered while reviewing the academic literature in this paper.

4. RESEARCH OBJECTIVES

The purpose of this paper is to examine Canadian and international research, drawing on a range of academic disciplines, to measure the economic benefits of second language skills and/or foreign language skills (FLS) and to identify how and where it might be applicable in the Canadian context. Policy avenues are identified and further research is proposed to inform Canadian public and private sector policy development in second language skills.

An overview of suggested policy directions is found in Appendix 1. A glossary of frequently used terms and acronyms is also found at the end of this paper.

4.1 METHODOLOGY

This literature review covers over 80 different research reports and studies, published journal articles, external polling and statistical data, media articles, web content and books. Many reports were sourced from the September 2014 bibliography published by the Centre international d'études pédagogiques (CIEP),³ a review of which was the initial objective of this literature review. Additional Canadian studies and references were sourced to complement the international literature and enhance the comparative context. The studies span from 2006 to August 2014.

The CIEP's primarily European-based bibliography reflects the current preoccupations of European language policy makers and researchers, namely - the economic (personal, corporate and national) benefits of a workforce with foreign language skills (FLS), French as a foreign language (or français langue étrangère; FLE) skills and second language skills (SLS) and the challenges of acquiring them.

The studies reviewed in this paper encompass a wide range of lines of enquiry involving language and the workplace and touch on disciplines in psychology, economics, sociology, linguistics, public policy and political science.

³ *Langues et employabilité*, edited by Marion Latour, Centre international d'études pédagogiques, September 2014. A few papers in Spanish, Italian and German were included in this review while some studies were not due to study unavailability, unavailability in either English or French, or duplication in findings from other studies.

The methodologies used are also diverse, based on statistical and quantitative methods, as well as on a number of qualitative methods ranging from questionnaires to case studies, interviews and observational studies. While a review of the quality of the methods employed is beyond the scope of this paper, there is great variance in the reliability and interpretation of some of the findings presented.

5. THE MARKET VALUE OF SECOND LANGUAGE SKILLS

Studies confirm that bilingual students or job candidates offer potential employers “hard, technical” language skills, as well as “soft skills”. Certain key “soft skills” valued by employers, which are often associated with people with SLS, or with people with international experience, are in fact cognitive or psycho-social, rather than the “hard skills” of high proficiency in a SL, or due to the heavy use of a SL on the job.

The “hard” technical skills provide benefits at all three levels, the micro-economic for the individual, meso level benefits for the company and macro-economic benefits for the country.

5.1 SOFT SKILLS: COGNITIVE AND PSYCHO-SOCIAL BENEFITS

Being bilingual or “plurilingual” is common worldwide. According to some estimates, up to 66% of the world’s children are raised in more than one language, while in a European study, a majority of respondents indicated they could speak more than one language (56%) (Marian 2012: 1). In a number of European countries, the share of bilingual speakers was even higher (for example, Luxembourg 99%, Sweden 97%, and Latvia 95%).

Bilingualism is also the norm in West Africa. English and French are the official languages of Cameroon, which also has four lingua franca and 285 native languages (Koenig, Chia & Povey, 1983, cited in Cook 1997). Neighbouring Nigeria has 400 languages and three main languages which are spoken by 50% of the population (Bamgbose, 1994, cited in Cook 1997).

In comparison, in Canada in 2011, the level of French-English bilingualism was 17.5% (Lepage and Corbeil 2013). In the US, the rate of bilingualism has been increasing steadily, from 10.97% in 1980 to 19.73% in 2007 (Marian 2012: 2).

Before reviewing the economic advantages of SLS/FLS, it is worth examining the cognitive and psycho-social benefits, as these will place the SLS/FLS economic research in a broader context. Cognitive benefits in the field of psychology have been conclusively established and briefly itemizing these will serve to demonstrate the complex linkages between cognitive, social and economic benefits.

The cognitive and neurological effects of bilingualism have been well researched by psychologists since at least the early 1960s.⁴ A plethora of research has demonstrated that benefits extend from early childhood to old age.

Studies confirm that bilingual students or job candidates offer potential employers “hard, technical” language skills, as well as “soft skills” such as:

- increased mental adaptability
- flexibility in task execution
- attention to detail, and
- many useful social communications skills

These are directly relevant to a range of occupations and industries.

⁴ E.g., Cook (1997) notes, for example, Peal and Lambert (1962), Ianco-Worrall (1972), Lambert, Tucker and d’Anglejan (1973), Landry (1974).

Social and cognitive benefits, while very specific, range from improved brain processes to changes in brain structures, as follows:

-
- *Improved executive function, particularly attention to task, inhibition and task switching, because of the need to control and switch sub-conscious access to one language while using another*
 - *Improved memory, better visual-spatial skills, improved creativity*
 - *Improved sensory processing due to heightened hearing to distinguish between different language sounds, tone and pitch*
 - *Heightened hearing skills combine with better social skills - listening skills and attentiveness to others*
 - *Greater attention to detail, and inhibition of irrelevant information (because previously important information no longer matters)*
 - *Increased volume of both gray matter and white matter*
 - *Together, these developments lead to improved learning ability, which the individual applies generally, i.e. outside of language learning*
-

(See summary of benefits in Marian 2012:2-8. See also Genesee 2009: 2.)

Certain key “soft skills” valued by employers, which are often associated with people with SLS, or with people with international experience, are in fact cognitive or psycho-social, rather than the “hard skills” of high proficiency in a SL, or due to the heavy use of a SL on the job. This paper will demonstrate that both the “soft skills” and “hard skills” of individuals with SLS are highly valued and employed on the job. Some job environments require both, while other job environments only value and employ the former, simply because the latter aren’t immediately required.

Many employers know that a bilingual employee will show flexibility, adaptability and specific FLS. When combined with the required technical (vocational) skills, these employees can be easily and repeatedly moved from one type of work environment to another, much more so than a unilingual employee. Employers also intuitively know, or discover through experience, that a moderate level of language skills is sufficient, and the bilingual or plurilingual employee’s highly attuned listening and cross-cultural skills will compensate for lower language skills.

Multinational corporations and in internationally active organizations are trending towards a more multilingual environment, where receptiveness to working cross-culturally, and across languages becomes the norm, as opposed to enforcing a one-language environment.

Some trends in the workplace are moving towards a more multilingual environment, where a receptiveness to work cross-culturally, and across languages, may become the norm, rather than enforcing a one-language communications environment.

5.2 HARD SKILLS: ECONOMIC BENEFITS ON THE MICRO, MESO AND MACRO LEVELS

Sufficient research has been undertaken in economics to isolate a number of economic benefits of SLS/FLS for the bilingual individual, for a company or industry sector, and at the region or country level. Some of the research takes pains to document the actual usage of a SL/FL on the job. The evidence from this research therefore demonstrates the benefits of the “hard” technical language skills, as well possibly of the soft skills of enhanced cognitive and social skills.

Nevertheless, whether the skills used are hard and technical, or soft, the policy implications for the Canadian context are striking for justifying:

- immersion/core French/English in schools/minority language schools
- heritage language instruction
- immigrant integration through OL classes and maintenance of their mother tongue

The benefits for employers and business functions, ranging from finance, IT, sales and purchasing and senior management, also need to be shared widely. Finally, the economic benefits of SLS/FLS at the national and regional levels, in terms of job creation and contribution to GDP, are compelling enough from a public policy perspective

5.2.1 ECONOMIC BENEFITS FOR THE BILINGUAL INDIVIDUAL (MICRO LEVEL)

This section will demonstrate that bilingual individuals derive a number of benefits from their language skills: insurance against lay-offs, higher wages and rates of employment, higher paying occupations and industries, greater labour mobility. Furthermore, there are earnings benefits for immigrants to learn, and use, the language or languages of the host country, but also to actively maintain their mother tongue. The section begins with a discussion of the gradual shift in policy attention away from language and culture towards language and the economy.

Following early work by psychologists on the cognitive and psycho-social benefits of second language learning (SLL) or second language skills (SLS), the emphasis of academic enquiry demonstrably shifted to explore and possibly measure the economic value of languages, whether in terms of employability, profit or rise in GDP. As explained by Heller and Duchêne (2012):

“During the 1990s and into the twenty-first century, we are witnessing the widespread emergence of discursive elements that treat language and culture primarily in economic terms. This discourse does not abruptly or entirely interrupt or replace older discourses which treat language as political and cultural, associating it with the formation of the nation-state; rather, the two are intertwined in complex ways. Nonetheless, we will argue here, something new is happening, something that shifts the terms on which social difference is made and on which relations of power are constructed.” (Heller and Duchêne 2012:3).

In one area of enquiry, for example, the historical evolution of the role of, or state attitudes towards, minority groups and minority languages, used to be socio-political, while it is now increasingly justified on economic terms. To demonstrate this expanded perspective, Heller and Duchêne give examples of minority language groups in Canada, Portuguese guest workers in Switzerland, and minority groups in China, where these groups are now considered economic assets, such as for the purposes of labour mobility in Canada or tourism in China (Heller and Duchêne 2012: 7-8).

The linguist, François Grin, and his colleagues have reviewed the economic research on the subject of multilingualism since the early 1960s and refined it with linguistic areas of inquiry to review the benefits from both a macro-economic and a micro-economic

perspective.⁵ Grin (2013) examines the micro-economic demand for foreign or second language skills by employers, for the purposes of their business, and demonstrates the difficulties in answering this question for both conceptual and empirical reasons (Grin 2013: 17). Grin points out that, just because empirical studies demonstrate the use of various languages, this doesn't demonstrably prove their economic value, or their relation to the means of production, rates of profit, etc. That it seems to make sense is not proof in and of itself (Grin 2013: 17).

Furthermore, while many opinion surveys of business actors have been undertaken to investigate the impact or value of language to their business, the questionnaires were not first based on a hypothetical model of inquiry, where the use of FLS or SLS are the independent variables, and the desired economic output (change in productivity, profits or costs) are in the position of dependent variables.

The independent variables represent the inputs to be tested to determine if they are the cause of the changes in the given output. Without a hypothetical model in place, "... les questions posées ne peuvent l'être qu'un peu (au – sic) hasard, sur leur bonne mine, plutôt qu'en raison de leur pertinence pour la compréhension des processus de création de valeur économique. » While some researchers have expressed caution in using the findings of opinion surveys, Grin and Sfreddo state that, so long as the survey is of sufficient scale, researchers can account for biases which emerge using statistical techniques (Grin and Sfreddo 2011: 3).

Returning to the objectives of this section of the paper, Nikuze (2013) explains the new perspective thus:

« Le concept de « valeur marchande de la langue » introduit par François Grin (1997, 2002) rend compte de cette relation langue-économie. À un moment donné, une langue X a une valeur marchande (vs une valeur sociale ou familiale, ed.) lorsque parler cette langue facilite au locuteur de vendre des produits à une clientèle parlant la langue X et réalise davantage de profits, ou si un employé parlant la langue X gagne davantage que ses confrères qui ne la maîtrisent pas.

(Grin, 2002: 21). » (Nikuze 2013: 91)

SLS AS INSURANCE AGAINST LAYOFFS

A perhaps unexpected benefit of bilingualism is that, according to a Swiss study, it can hedge against lay-offs.

SWITZERLAND

A ground-breaking 2009 case study by Grin Sfreddo and Vaillancourt of language skills in the Swiss workplace, entitled *Langues étrangères dans l'activité professionnelle* (LEAP), attempted to quantify a relationship between employee language use and salary.

⁵ See for example, Grin 2013, Grin and Sfreddo 2011, and Grin, Sfreddo and Vaillancourt, 2010.

Using formulations of salary elasticity from labour market analysis, the LEAP project sought to examine whether the elasticity would be the same for unilingual and bilingual workers (Grin, in DORIF 2013: 9). They sought to see whether, following a rise in the cost of production, employers would treat unilingual and bilingual workers the same. Based on their analysis of LEAP data of the Swiss labour market, Grin et al found that, when the cost of labour rose by 5%, the volume of employment fell amongst the unilingual workers by 8.7%. Faced with the same 5% increase in labour cost, the volume of employment for bilingual workers fell by only 3.7%. In other words, as workers became more expensive, **employers were less likely to let go of bilingual workers** than unilingual workers (2.35 times less likely), despite the documented fact that **bilingual workers tended to be paid more**. Bilingualism acted as a type of insurance against mass lay-offs (Grin, in DORIF 2013: 9).

The Swiss LEAP study found that, as wage rates rose by 5%, employers were less likely to let go of bilingual workers (3.7%) than unilingual workers (8.7%), despite their higher cost.

EMPLOYABILITY AND EARNINGS

UNITED KINGDOM

For the United Kingdom, Mann notes from the longitudinal survey by the Higher Education Statistics Agency, that foreign languages graduates have **good employability rates**, which are above the average for non-vocational subjects (Mann 2011: 10). Surprisingly, they are also more likely to be working, or in further study, 3.5 years after graduation, compared to students in professional programs such as law, architecture, business or computer science. The Higher Education Funding Council (HEFC) noted that modern foreign language graduates were able to go into a wide variety of careers and **their mean salary** 3.5 years after university graduation was £26,823 (41,484 CAD) - the highest of all subjects which the HEFC deemed strategically important, - and higher than that of students of engineering, mathematics, physics, and chemistry (Mann 2011:10). The greater flexibility of skills of FL students means they can take advantage of a broader range of employment opportunities.

UK studies demonstrated that FL graduates are more likely to be working or in further study than students in professional programs such as law and business, and have a higher average salary than STEM graduates.

UNITED STATES

Mann reports US research into the **wage earnings differentials** for high school graduates. Two in-depth longitudinal surveys found statistically significant correlations between language study and wage premiums. In a study examining the study of modern languages in school, economist Altonji, found a “substantial” effect on later earnings, of 4%, with the highest effects on high school graduates who did not continue on to university (Mann 2011: 10).

A comparable study of US college graduates by Saiz and Zoido found that those with a conversational ability of a second language earned between 2-3% more than those without, a slightly lower wage differential than for high school graduates. The US studies go further and suggest that SLL has even broader benefits. They note that many language graduates end up in occupations which do not make a direct or full use of their language abilities, and yet **they still enjoy a wage differential**, even when controlling for other factors, such as type of university, cognitive ability or family background.

US studies found that students learning FL in school or at the postsecondary level enjoy a long-term wage differential vs. those who did not, even when controlling for factors such as education level, family background and cognitive ability.

As Mann observes: “This has led a number of academic commentators to ask whether there is something distinctive about the process of learning languages which develops broader skills of value to employers, such as effective and confident communications” (Mann 2011:10). In a focus group discussion with managers of human resources, they found that recruits with FLS tended to have a range of transferable skills, or “soft skills”, including communications skills, listening and interpersonal skills, greater cultural awareness, determination and discipline, and a readiness to learn (Mann 2011:11). These observations mirror the cognitive benefits of bilingualism documented by psychology researchers.

Human resource managers believe that recruits with FLS tend to have a range of transferable skills, including:

- listening and interpersonal skills
- greater cultural awareness
- determination and discipline
- a readiness to learn.

CANADA

Similar to Mann’s finding on employability in the UK, the Canadian Council on Learning notes that, according to the 2006 Canadian Census, employment rates are higher for French-English bilingual workers than for either English-only or French-only Canadians (CCL 2008: 2). In 2011, Canadians who spoke the two official languages in Quebec had average annual incomes approximately 37 percent higher than those who spoke only one official language. Similarly, in the rest of Canada, the average annual income of individuals who spoke both official languages was approximately 15 percent higher than that of persons who did not speak both official languages (National Household Survey, Statistics Canada: 2011).

In Canada, rates of employment and average annual incomes are higher for French-English bilingual workers than for English-only or French-only Canadians.

CHRISTOFIDES AND SWIDINSKY STUDY

In a 2008 paper focussing on bilingual workers in Quebec and in “Rest-of-Canada”, Christofides and Swidinsky go further, and examine whether there are economic returns to not only having bilingual English-French language skills, but also in terms of using these skills on the job. Starting in 2001, the Canadian Census asks the extent to which the bilingual person uses Canada’s official languages on the job.

When taking into account a number of control variables related to occupation and industry sector, their analysis found that language skills had a more direct effect on the worker’s choice of occupation and industry, rather than on the wages within a given occupation and industry (Christofides and Swidinsky 2008:16). Men outside of Quebec with French language skills tended to be disproportionately represented in higher paying occupations and industries. The average earnings of managers and professionals are well above the overall mean of \$52,737. Bilingual Anglophone males outside of Quebec who mostly/frequently use English at work or mostly English/frequently use French at work were employed as managers more often than unilingual Anglophones.

The data is even more striking for professional occupations, as indicated in the table below.

Anglophone Males Outside of Quebec

Men outside of Quebec	% Employed as managers	% Employed as professionals
Bilinguals who use mostly/frequently English at work	22.7%	34.7%
Bilinguals who use mostly English/frequently French at work	29.3%	30.6%
Bilinguals who use both (bilingual) or frequently French at work	16.5%	42.6%
Unilingual Anglophone Males	17.1%	21.2%

Christofides Swidinsky 2008: 33, table 1A

On the other hand, unilingual Anglophone males were more likely to be employed as blue collar workers (35.3%) (Christofides Swidinsky 2008: 33, table 1A). In addition, there is a higher representation of bilingual males in the rest of Canada in the public and para-public sectors (33.2% of bilingual males who use mostly or frequently English at work vs. 8.8% of unilingual males) (Christofides Swidinsky 2008: 16).

The results were generally similar for women. Bilingual women outside of Quebec were predominantly employed as professionals, secondly as white collar (administrative) workers, and thirdly as managers (Christofides Swidinsky 2008: 23). Bilingual women who use either official languages, or mostly French, are especially likely to be professionals (61.5%) (Christofides Swidinsky 2008: 33, table 1A). Nearly half (49.0%) of women sampled in this category work in the education sector, primarily as teachers (Christofides Swidinsky 2008: 18). Unilingual Anglophone females were most likely to be employed as white collar workers (53.2%) (Christofides Swidinsky 2008: 33, table 1A), what the authors characterize as “relatively lower paying” occupations (Christofides and Swidinsky 2008:23). Both unilingual and bilingual females were under-represented in blue collar occupations. The following table summarizes these findings.

Bilingual women outside of Quebec who use either official languages, or mostly French, are especially likely to be professionals, often in the education sector.

Anglophone Females Outside of Quebec

Women outside of Quebec	% Employed as managers	% Employed as white collar workers	% Employed as professionals
Bilinguals who use mostly/frequently English at work	16.8%	39.1%	40.8%
Bilinguals who use mostly English/frequently French at work	16.7%	42.8%	38.9%
Bilinguals who use both (bilingual) or frequently French at work	5.3%	32.5%	61.5%
Unilingual Anglophone Females	11.9%	53.2%	29.7%

Christofides Swidinsky 2008: 33, table 1A

GRENIER AND NADEAU STUDY

In a 2013 study, Grenier and Nadeau examine the earnings effects of the use of English or French at work in Montreal for different language groups, using micro-data from the 2006 Canadian Census (Grenier Nadeau, in Venice International University 2013).

Based on the 2006 Census random sample of 20% of the Canadian population, Grenier and Nadeau (2013) derive a very large sample of 204,653 adult workers, aged 18-64 years, male and female, working full-time in Montreal for one year, which they place in three language groupings: French mother tongue (71% of the sample), English mother tongue (11% of the sample), and Other mother tongue (18% of the sample). Data indicating level of education and place of birth (within or outside Canada) were also available for the sample. The dependent variable under study was the weekly earnings of the workers.

Their initial analysis of the use of languages on the job found that workers whose mother tongue was a non-official language were most likely to use an official language on the job: English or French 94% of the time, and English 47% of the time. This belies the assumption that immigrants or first generation Canadians work in ethnic enclaves and *avoid* the English and French society or economy. While this may sometimes be the case, Other Mother Tongue workers in Montreal still use English or French at work, 94% of the time. The data suggest that workers in the “Other” group may actually be able to function in both official languages, possibly making a number of them to some extent trilingual.

Grenier and Nadeau data suggests that workers in the “Other mother tongue” study group may be able to function in both official languages, making a number of them to some extent trilingual.

This is confirmed in a broader study of the National Household Survey of 2011 by Lepage and Corbeil, which found that immigrants living in Quebec (not just Montreal), whose mother tongue is neither English nor French, are often trilingual (Statistics Canada 2013: 6). Both official languages serve a useful purpose for immigrants living in Quebec.

Those in the French mother tongue group reported using English 20% of the time, while those in the English mother tongue group used French 32% of the time.

After weighing these indices by share of the population, Grenier and Nadeau (2013) found that English is used at work about 30% of the time in Montreal, which is almost three times the representative share of the English mother tongue group (11%). They argue that the relative attractiveness of the use of English at work needs to be explained by something other than the size of the English mother tongue in the population (Grenier and Nadeau 2013:11). After drilling down for each Other mother tongue, **they find that all Other mother tongue populations use English at work more** than the sub-group Canadian-born of the French mother tongue group (who use English 16% of the time), specifically: 17% for Creole speakers; 27% for Khmer speakers; 35% for Arabic speakers; 57% for German and Russian speakers; 82% for South Asian language groups, and 84% of Filipino speakers (Grenier, Nadeau 2013: 32, Table 2).

Immigrants with “Other” mother tongues eventually, over time, use more French at work.

Overall, it takes about ten years for immigrants with “Other” mother tongues to increase their use of official languages at work.

The common knowledge of English as a second language in South Asia and the Philippines explains the data for these ethnic groups. Similarly, there is a high use of French at work for the language groups typically associated with Francophone nations, such as Creole, Khmer, Spanish, Vietnamese and Arabic. However the high use of English by workers with Mandarin or Northern European languages as mother tongue can best be explained by English as the international lingua franca.

Typically, immigrants who arrive knowing more English than French prefer to continue to use English in the workplace. (Grenier and Nadeau 2013:13) Over the years, French speaking immigrants increase their use of English at work (Grenier and Nadeau 2013:14).

On the other hand, immigrants with other mother tongues eventually, over time, use more French at work. Finally, immigrants with English as their mother tongue use less French at work to begin with, and do not use more over time. Overall, it takes about ten years for immigrants with other mother tongues to increase their use of official languages at work.

After studying the use of languages depending on variables such as education level, years since immigration, birth or previous residency in another part of Canada, in their Montreal study, Grenier and Nadeau find that schooling is positively related to the use of English at work, but not French, suggesting that English is an important language to master for jobs which require a high level of schooling. They also conclude that the different mother tongue groups respond differently to the same incentives in their choices of language of work (Grenier and Nadeau 2013: 15). After undertaking several forms of regression analyses on the data, they conclude that, for the French and Other mother tongue groups of immigrants, there are economic incentives to learn English and to use it at work (Grenier and Nadeau 2013:24).

In Montreal, there are economic incentives, for the French and Other mother tongue groups of immigrants, to learn English and to use it at work.

IMMIGRANTS AND EARNINGS

The effective economic integration of immigrants is a policy consideration for all immigrant receiving countries. Researchers in Canada and the United States have examined the role of bilingualism in facilitating the economic integration into the workforce.

USA

Recent U.S. research (Agirdag 2013) has shown that young immigrants whose bilingual abilities (English plus their mother tongue) are maintained, either at home or in the community, or in a classroom setting, do better in school and in their careers later in life. Holding all other socio-economic factors constant, they do better than either young non-Anglophone immigrants who did not maintain their first language, or even unilingual English speakers (i.e. American born with no recent ties to immigration),

This establishes the importance of continuing to speak one's mother tongue to better succeed in learning and on the job later in life.

CANADA

A recent Canadian study by Ravanera et al for Citizenship and Immigration Canada found that Francophone bilingual immigrants (their first official language spoken, or FOLS) outside of Quebec fare better economically than Anglophone bilingual immigrants, although they tend to be less well integrated socially (Ravanera et al 2014).

Francophone bilingual immigrants outside of Quebec fare better economically than Anglophone bilingual immigrants, although they tend to be less well integrated socially.

In Quebec the opposite was true: Anglophone bilingual immigrants fare better economically than Francophone bilingual immigrants, although again they are less well integrated socially.

Within Quebec the opposite was true, Anglophone bilingual immigrants fare better economically than Francophone bilingual immigrants, although they are less well integrated socially.

Based purely on an analysis of supply and demand, this stands to reason, with the relative abundance of Francophones in Quebec, and of Anglophones in other parts of Canada. In other words, the relative scarcity of Francophones outside of Quebec raise their value, similar to Anglophones within Quebec, however it *also* raises interesting questions regarding social integration.

In a similar vein, in Morocco, as will be discussed later, the French language (Français langue étrangère or FLE) was overwhelmingly used as the language of

business, despite the language difficulties for native Arab speakers and despite some uneasiness expressed with the use of French (FLE) (Majdi 2011).

LABOUR MOBILITY

Labour mobility is another area where bilingualism or plurilingualism is a personal asset that can be exploited to advance one's career and economic outcomes.

CANADA

Bilingual Canadians are more likely to migrate than unilingual Canadians.

A Canadian study from 2008 on interprovincial mobility and earnings found that Francophones outside Quebec and Anglophones in Quebec were both more likely to migrate to another province for economic reasons than other Canadians, respectively three times and ten times more likely (Bernard et al 2008: 24).

Bernard observes that a number of Canadian studies of interprovincial migration show that, while interprovincial mobility has positive earnings benefits for individuals (and a net positive effect on productivity levels in the country), it also tends to increase provincial disparities in skills and human capital (Bernard et al 2008: 16). This significant effect of FLS/SLS has implications for countries and regions concerned about the brain drain effects of emigration of their young and educated population. On the other hand, however, migration substantially increases remittances returning to the home region.

EUROPEAN UNION

Aparicio and Kuehn (in Venice International University 2013) investigate how prior knowledge of FLS might influence an individual's decision to immigrate to a country with better economic prospects. Considering the wide variation in youth unemployment rates across Europe, and the EU policy of free movement of labour, one would expect to see sufficient levels of migration to attenuate some of these differences in unemployment rates. Besides this "pull" factor, youth have lower costs in terms of breaking social ties, and have longer time horizons over their working lives to recoup the costs of migration (Aparicio and Kuehn 2013: 2). Despite these factors, youth unemployment rates remain quite high in many parts of the EU.

Studying a foreign language at school greatly increased the odds of migrating to a country with that foreign language.

Aparicio and Kuehn use two types of data for the study. As a proxy for FLS, Aparicio and Kuehn use compulsory foreign language teaching curricula standards across Europe (e.g., English in Poland, German in the Netherlands, and French in the UK etc.), over 28 destination countries and 31 countries of origin (Aparicio and Kuehn 2013: 7). For all EU students (outside of Ireland and Scotland) students learn an average of 1.5 foreign languages in secondary school (Eurostat 2012s, cited in Aparicio and Kuehn 2013: 3). With the exception of Portugal and the United Kingdom, English is studied by over 80% of high school students in the EU (Eurostat 2012b, cited in Aparicio and Kuehn 2013: 3).

Building on the gravity model used to explain labour mobility of migrants, Aparicio and Kuehn add a new explanatory variable entitled "linguistic distance" (Aparicio and Kuehn 2013:5), based on the premise that exposure to foreign language learning can be used to reduce this distance.

Speaking the language of a host country increased migration to that country fivefold.

In their study of countries providing compulsory language teaching of English, French, German and Spanish, they found that FLS was statistically significant in raising the odds of emigrating to the UK, Ireland, Malta (Maltese and English official languages), Belgium, Germany, Austria and Spain. Their statistical analyses showed that this coefficient remained stable, even after controlling for destination country, country of origin, age group and years. Speaking the language of a host country increased

migration to that country fivefold (Aparicio and Kuehn 2013: 9).

Aparicio and Kuehn also explore the data to see if there are any correlations between government policy decisions to add or change a foreign language to the curriculum and the propensity of their population to migrate (Aparicio and Kuehn 2013: 10). They find no relation between educational reforms and changes in migration flows, or in unemployment patterns.

Aparicio and Kuehn found no correlations between government education and language policies and migration flows.

5.2.2 ECONOMIC BENEFITS AND LANGUAGE COSTS FOR COMPANIES/SECTORS (MESO LEVEL)

With such positive benefits accruing to individuals, it stands to reason that benefits would flow to their place of employment as well. Economists first examined language as a barrier to trade, however emphasis eventually shifted to the effects of the use of foreign languages, costs associated with lack of language skills, and the lost of export business due to language and cultural barriers.

LANGUAGE AS A BARRIER TO TRADE

Earlier research by economists on the effects of language at the company level tended to see language as a barrier to trade. Many researchers in the CIEP studies surveyed here examine earlier works by economists that attempted to quantify the costs associated with foreign languages, equating them to trade tariff equivalents (Bel Habib 2011:8). Authors such as Frankel & Rose (2002) and Heliwel (1999) estimated that the costs of language barriers were equivalent to a tariff barrier of between 15% and 22%, while sharing a common language can reduce the language costs by 75% to 170% (Bel Habib 2011:8). Similarly, Arcand at the Conference Board of Canada cites Hutchinson (2001) which found that United States bilateral trade between 1970 and 1986 was lower with a country that had a dominant language which was harder for an English speaker to learn (for example Japanese vs French) (Arcand 2013: 7).

Previously, economists focussed on the costs and barriers associated with languages. Now researchers and policy-makers focus on FLS as assets, and the need for companies to embrace plurilingualism in order to compete on a global scale, either in domestic or foreign markets.

Heliwel (1999) estimated that the costs of language barriers were equivalent to a tariff barrier of between 15% and 22%, while sharing a common language can reduce the language costs by 75% to 170% (Bel Habib 2011:8). Similarly, Arcand at the Conference Board of Canada cites Hutchinson (2001) which found that United States bilateral trade between 1970 and 1986 was lower with a country that had a dominant language which was harder for an English speaker

Bel Habib (2011: 8) also cites Noguier and Siscart (2003) who found that the impact of language barriers vary across economic sectors, with sectors requiring more interactive communication such as clothing, or were inherently language-based such as printing and publishing, experienced higher language barriers than commodity focussed sectors.

In contrast, in Europe today plurilingualism in a company is increasingly seen as an asset, a value-added and necessary factor for the company's growth and competitiveness (Mattioda 2013: 7). There is growing recognition of the need to support small and medium-sized enterprises (SMEs) and promote the conscious adoption of language policies by SMEs. Large European corporations have long coped with the difficulties associated with language and cultural differences, due to their presence in many territories of multiple languages and cultures (Mattioda 2013: 7). They may have developed corporate language policies that could be instructive to SMEs.

LANGUAGE USE

In an earlier study in 2006, before the theoretical constructs for econometric modelling for language variables undertaken by Grin et al were available, a Belgian institute - Tweetaligheid In Beweging – Bilinguisme En Mouvement (TIBEM) undertook a mixed qualitative and quantitative study of foreign language use and associated costs in private enterprises in Brussels, the Belgian and European capital. The TIBEM study reviewed methodologies and findings of 11 studies prior to constructing their own.

This section provides an overview of previous studies on language use as outlined in the Belgian TIBEM study.

The Belgian institute TIBEM notes that previous studies had found that in countries with more than one official language such as Switzerland (Grin and Stroebel 2001) and Belgium, the first “foreign” language used is another official language of the country (TIBEM 2006: 11). In the case of Belgium this refers to the use of French in Flanders, and Dutch in the French-speaking regions. This could be explained partly by geographic proximity, but also by the domestic market, and common market laws and regulations.

European studies note that SMEs rely more on the use of official languages than large enterprises with more than 50 employees. Large enterprises rely as much or more on an international language, particularly English, or other host country languages, as they are more likely to do business internationally.

Examining the use of foreign languages by function, Grin and Stroebel (2001) and Hagen (1992) found that sales and marketing departments were more likely to use FLS and cross-cultural skills to ensure smooth relations with foreign sales contacts in countries of other languages and cultures.

In countries with more than one official language, the first foreign language used in the private sector is one of the other official languages.

SMEs rely more on official languages as they tend to focus on domestic or internal markets.

Large enterprises are more likely to do business internationally, and so rely as much or more on English, or the languages of their export markets.

FLS, RECRUITMENT AND ADVANCEMENT

This section summarizes TIBEM’s overview of previous studies on FLS, recruitment and advancement.

A number of previous studies indicated that most companies (50-75%) made FLS a requirement at the stage of recruitment (Gielis 2000, Hagen 1992, Menten 2002). While this is the case in Belgium and parts of Europe, this is not often the case in either the UK or Canada, where it is more often seen as an asset, desirable but not essential.

Mastery of FLS was a factor for advancement for 75% of employees (TIBEM: 12). Lack of candidates with requisite FLS was often cited as a reason for positions going unfilled. In a 2005 study, 14% of jobs in Wallonia were not filled for this reason (UWE 2005). In a study of the Brussels capital region, many positions were not filled due to the combination of essential requirements of multilingual and technical skills (ORBEM 2004). Multilingual requirements were essential at all levels of occupations in the capital region. Despite this requirement, only 10.3% of applicants on average had both oral and written skills in the two official languages, French and Dutch, while 24.1% of applicants for university-level jobs did so. More highly educated Belgians were more likely to have oral and written skills in both official languages.

WORKPLACE LANGUAGE TRAINING

This section summarized TIBEM's overview of previous studies on workplace language training.

- Few European companies had a strategy to address the lack of FLS of their staff.
- Most employees took language training outside of work hours, with or without the support of their employer.

In the five European regions studied by Hagen (1992), few companies had a strategy to address the lack of FLS of their staff (TIBEM: 12).

In Belgium, studies found that the majority of language training was taken by employees outside the workplace, with or without the support or reimbursement of their employer, primarily by middle-senior management staff, and secondly by general staff (Fédération des entreprises de Belgique 2004, Menton 2002).

COSTS ASSOCIATED WITH FLS

This section summarizes TIBEM's overview of previous studies on costs associated with FLS.

The Belgian institute TIBEM cites previous studies which found the lack of FLS increased financial losses for companies. In Belgian studies, 15% of companies interviewed in the Limburg region (Gielis 2000) and in the Brabant Flamand region (Menten 2002) indicated having lost contracts due to the lack of relevant FLS, while 20% indicated that they cut off commercial ties for the same reason (TIBEM: 11). In Hagen's 1992 study across Europe, he found that 16% of companies lost contracts for this reason.

A number of European studies confirm that 15% to 20% of companies say they have lost business due to an inability to communicate in the relevant language.

BELGIUM

The TIBEM study focuses on the three kinds of costs associated with multilingualism: a) the loss of contracts (or not) due to the lack of FLS, b) costs associated to multilingualism and c) costs of language training.

A Language use in the Brussels private sector:

- 95% use French for internal and external communication
- 91% assign French official language status within the company
- 70% use Dutch internally and almost 90% use Dutch for external communications.
- English is used at a high rate for external communications (over 80%) and less so internally (47%).
- This is followed by German, Spanish and Italian as the next most common languages used for internal and external communications

The study identified 22 different languages in use in the Brussels private sector, a range which is as wide as in other studies (TIBEM: 51). In addition to the dominant EU languages, Chinese, Japanese, Korean, Turkish and Russian were also in use. In terms of Belgium's official languages, 95% use French for internal and external communication and 91% assign it official language status within the company, along with Dutch for 64% of companies. Seventy percent of companies use Dutch internally and almost 90% use Dutch for external communication (TIBEM: 51). As with other surveys, English is used at a high rate for external communications (over 80%) and less so internally (47%). This is followed by German, Spanish and Italian as the next most common languages used, at varying rates, for internal and external communications.

The 2006 study used a representative sample by company size and five industry sectors for private sector companies in the Brussels capital region (TIBEM: 36). For the quantitative part of the study, a questionnaire was sent to more than 5,000 companies over a period of four months, followed by additional efforts to promote the survey and recruit respondents, with the final sample size totalling 357 completed questionnaires (TIBEM: 42).

It is unclear from the study, however, whether weighting was applied to the number of respondents in each grouping to ensure balanced representation by company size and by sector. The results seem to show some over- and under-representation (TIBEM: 43). For under-represented sample groups, particularly small enterprises with under 10 employees, the surveyors acknowledged this issue and sought to compensate with information obtained during the qualitative phase of the survey (TIBEM: 44). The over-representation in medium and large enterprises and in the services sector was not seen as a problem as these companies are precisely those which undertake a great deal of internal and external communications and which are most affected by the quantity and quality of staff with or without the necessary FLS.

COSTS ASSOCIATED TO LACK OF LANGUAGE SKILLS

Finally, this section summarizes TIBEM's overview of the costs association with a lack of language skills in Brussels based companies. In addition, this section examines more recent studies in Switzerland and the UK and concludes with a more extensive examination of a major EU study from 2006 called *Effects on the European Economy of Shortages of Foreign Language Skills in Enterprise* (ELAN).

According to the TIBEM study, 40% of companies responded that they have lost a contract due to the lack of relevant FLS, while 46.5% did not (TIBEM: 79). The share is slightly higher (44.9%) for small companies (under 10 employees). Interviewed companies explained that large companies had greater personnel and other resources at their disposal to handle foreign language needs. Yet the relatively small disparities between small and large companies may suggest that small companies can rely on external sources in this important capital city, such as translation and interpretation agencies, to assist with this requirement. By sector, the loss of contracts was highest for hotel and restaurants, with the explanation given at interviews as cultural: clients were not interested in contracting a French caterer or restaurant for typical Dutch clientele and menu choices, and presumably vice-versa (TIBEM: 81).

When faced with a problem of vacancies in advertised multilingual positions, for the key positions, employers find they need to choose between professional and language skills (TIBEM: 102), similar to Tinsley's findings for the UK. In Brussels, employers made their choices based on the type of occupation being filled. With commercial and administrative positions and staff with frequent contact with clients (services, reception etc.), the language and communications skills trumped professional skills. For other occupations, where the candidate met the professional requirements, the employer was prepared to invest in language training, provided that the candidate was already at least bilingual, or at least had the basics of the required language.

As in other countries with official languages, in Brussels, knowledge of two official languages is a major asset in the private sector.

As in other regions with official languages, such as Canada and Switzerland, knowledge of two official languages is a major asset in the private sector in Brussels (TIBEM: 101). Paradoxically, however, for some employers it has proven more difficult to find bilingual (French-Dutch) candidates than multilingual ones. One explanation given is that multilingual candidates self-select and do not apply for bilingual jobs in low-paying industries, such as call centres. Another is the common finding that professional training at the postsecondary level, as has been said elsewhere, often does not require FLL.

SWITZERLAND

As a means to develop new empirical methods for the discipline of language and economics, Grin, Sfreddo and Vaillancourt's 2009 LEAP study (*Langues étrangères dans l'activité professionnelle*) is one of the few studies which painstakingly measured the use of FLS within divisions of a sample of companies in different sectors and language regions of the country.

IMPORTANCE OF PURCHASING OR IMPORTING, AS PART OF A FIRM'S INTERNATIONAL ACTIVITIES

In a ground-breaking study of a sample of Swiss private companies in the German-speaking and French-speaking parts of the country, Grin et al found that purchasing divisions were the most likely to use a diversity of language skills, whether official or foreign languages, followed by corporate/management divisions, and only thirdly by sales and marketing (2009: 38). This is true for both language regions, at different levels. On an indexed scale of 0:1, production divisions were the least likely to use FLS. (See table below).

Extent of use of foreign languages, by company division
Measured by an Index of language diversity*

Divisions	French-speaking Switzerland	German-speaking Switzerland
Purchasing	0.60	0.51
Management	0.52	0.40
Sales	0.49	0.37
Other	0.44	0.36
Production	0.28	0.30
Total	0.39	0.40

Grin et al 2009: 38

*where 0 means no language used other than the majority language of the region, and 1 means maximum diversity of national and foreign languages.

This finding is supported, *at least for SMEs who were active in importing and exporting*, in a large-scale, statistically representative survey of SMEs across Europe examined later in this paper (EC, DGEI 2010: 47). The study found that, of the 2300 European SMEs who were active in both importing and exporting, 39% first recognized a need for FLS via importing activities vs. only 18% of SMEs

who began through exporting. Another 42% undertook importing and exporting in the same year. This establishes the clear importance of importing, i.e. purchasing or procurement as part of a supply chain process, as an entry way into “internationalization” and use of FLS.

In terms of macro-economic benefits, the Grin et al (2009) LEAP study found that multilingualism contributed to a wide range of economic sectors, and that Swiss multilingualism generated 46 billion Swiss Francs (49 billion CAD), or 9% of Swiss GDP (cited in Bel Habib, 2011:8). The table below identifies the economic sectors which benefitted most from working in many languages. They were, perhaps surprisingly, IT services in first place, followed by the chemicals industry and transportation. The ones which benefitted the least were the retail sector and public administration (roughly 3% addition to GDP per sector). It is possible that the Swiss retail sector is mostly active in local markets rather than in e-commerce, which would allow for more sales over the border, and public administration in Switzerland is generally mandated to work within only one official language per region (despite some inter-provincial relations in more than one official language).

FLS in Swiss companies, by sector

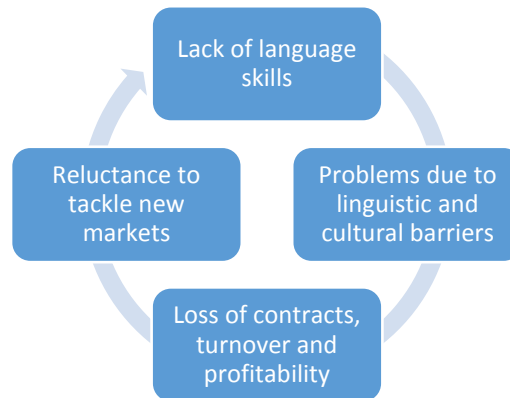
Industry sector	Contribution to GDP from multilingualism
IT services	22.67%
Chemical	16.2%
Transport	16.03%
Mechanical Engineering	15.31%
Manufacturing	12.33%
Finance	11.92%
Retail	3.45%
Administration, public	2.84%
GDP	9%

Grin et al, in Bel Habib, 2011: 8

UNITED KINGDOM

In contrast to the macroeconomic approach adopted by TIBEM and for the LEAP study, researchers have also examined the market value of FLS at the company level. Bel Habib (2011) describes the ELAN model, or *Effects on the European economy of Shortages of Foreign Language Skills in Enterprise*, developed for the EU by the UK’s National Centre for Languages (2006).

Effects of lack of language skills on exports



National Centre for Languages (2006), cited in Bel Habib (2011: 9).

Related to this model, Bel Habib relates the approach taken by the British Chambers of Commerce (BC). In the 2004 edition of its language survey of its members, the BCC divided the respondents who were export managers according to the value they placed on FLS. The BCC found a striking positive correlation between managerial emphasis on FLS and export turnover (Bel Habib 2011:10).

Seventy-seven percent of export managers who were “Enablers”, i.e. who placed the most value on FLS in their business, had an annual export turnover over €750,000. As the segments of the manager population placed less and less value on FLS, their likelihood in having an annual export turnover over €750,000 correspondingly decreased, with a 67% likelihood for “Adaptors”, 54% for “Developers” and only 33% for “Opportunists”, those who valued FLS the least (Bel Habib 2011:10). While export sales fell by about €75,000 per year for “Opportunists”, they correspondingly rose by an average of €440,000 for “Enablers.”

The more value UK export managers placed on FLS, the higher their likelihood in making over €750,000 in annual export turnover.

Economists Williams and Chaston (2004, cited in Mann 2011: 17) compared the effects of FLS, international experience and exporting experience of a representative sample of 400 exporters on their approach to their jobs:

“(Export managers who are ...) linguists are more likely to be discriminating about the intelligence collected, and more innovative in their decision-making, but use information responsibly. Those with international experience are likely to be more active information gatherers and decision-makers, while length of exporting experience is indicative of a more confident, if rather more conservative approach.”

EUROPEAN UNION

LOSS OF EXPORT BUSINESS DUE TO LANGUAGE BARRIERS

Similar findings on the loss of export business emerged from the ELAN survey of the use of FLS by almost 2000 European SMEs from 29 European countries (National Centre for Languages 2006) first noted by Bel Habib and the UK survey of British Chambers of Commerce members (see above under United Kingdom). Regarding the EU ELAN survey, while the sample by country and by

industry sector is not effectively represented, with some over and under-representation, nevertheless some interesting findings are worth considering when taken into consideration with other research. The ELAN survey of 2006 found that 11% of respondents (195 SMEs) had lost an export contract for lack of FLS. On the other hand, only 4% stated having lost a contract due to cultural barriers. Of the respondents who provided specifics, for 10 companies, these contract losses were worth over 1 million euros, for 37 companies, these contract losses were worth between 8 and 13.5 million euros, for 54 companies, the losses were worth between 16.5 and 25.3 million euros (Cited in Hagen, 2011: 4 and Bel Habib 2011:10). Two out of five expected to acquire new language skills in the near future. Whether it would be through hiring plurilingual staff, or through use of translation and interpretation or other services, it is not clear.

LOSS OF EXPORT BUSINESS DUE TO CULTURAL BARRIERS

About one in five European companies also reported cultural differences causing communications barriers to trade, including within the common market (Hagen, 2011: 4).

The ELAN survey does attempt to tie language use to a specific, comparable, economic variable – winning or losing export contracts. And yet, these contract losses might also point to a deliberate management decision. Not pursuing contracts in Russia or China, for example, might easily be explained by having no Russian or Chinese speakers on staff, but might also be related to a conscious decision to avoid potential bureaucratic delays, threats to intellectual property, or potential fraud, which might have been perceived with these markets. Without establishing whether the questionnaire gave the option to explore other lines of questioning such as these, the lack of language skills might appear a convenient reply which might, or might not, be altogether accurate.

BENEFITS OF FLS US AT THE COMPANY LEVEL

Bel Habib found widespread use of a number of intermediary languages by European SMEs in their export marketing to third markets. English was not the only major international language used in countries with a different national language; this occurred with other languages, such as German and Russian, particularly in Eastern and Central Europe. When asked to identify the languages they used in their major export markets, English was used to trade in 20 markets (including four Anglophone markets – the UK, US, Canada and Ireland), German in 15 markets, French in 8 markets, and Russian in at least five markets (the Baltic states, Poland and Bulgaria) (Bel Habib 2011: 5).

Drawing on the language capabilities of their staff, SMEs are flexible in their approach. Some indicated that they used Spanish to export to Portugal, or French to export to Spain and Italy (EC 2006, cited in Bel Habib 2011: 5).

The case of the use of German vs Russian in Central and Eastern Europe is an interesting one from a linguist's perspective. As Grin explains "... linguists are often intrigued by language economics questions, often because they are seen as the key to understanding some issues that are of central importance to language, such as the dynamics of language spread, maintenance and shift, or patterns of language learning" (Grin 2010: 37). In Canada, for example, policy analysts are well aware of the sociological impacts of the labour mobility of bilingual Canadians, and the consequences for Official Language Minority Communities.

One of the good practices recommended in the EC *Languages for Jobs* report is to learn the language of neighbouring countries (European Commission, EU 2020, *Les langues au service de l'emploi: fournir des compétences communicationnelles et multilingues pour le marché du travail*, 2011). Austrian companies have adopted this practice, according to the Austrian *Institut fuer Bildungsforschung des Wirtschaft*. The institute examined the present and future needs for foreign languages for business and, besides Russian and "high" German, in their business dealings Austrian companies also relied on Italian, Czech, Slovak, Hungarian and Slovene. This report argues, as does Bel Habib, that each company should draft a language plan in accordance with the languages of their business partners, and current and future business objectives.

Focussing on SMEs in Sweden, Germany and France, three countries with similar industry characteristics, Bel Habib combined the findings of the ELAN survey with other European research and found that SMEs which use a greater variety of foreign languages have greater success in export markets. Bel Habib chose to hold the overall economic characteristics of the exporting countries constant as the countries selected have similar industrial and economic structures (Bel Habib 2011: 11). Bel Habib found that, although the Swedish population is more multilingual than the German and French ones, Swedish SMEs use less languages in their export business (Bel Habib 2011: 3). While German SMEs surveyed used up to 12 languages of their export markets, and French SMEs used about 8 market languages, Swedish SMEs used only 3, primarily English (Bel Habib 2011: 2). He terms this the “Swedish competence paradox” and goes on to note the range of impacts - a lower number of exporting SMEs, limitations on the number of potential export markets and correspondingly lower export sales, and more specifically restricting access to growing markets, such as the BRICS countries (Bel Habib 2011: 3).

5.2.3 ECONOMIC BENEFITS FOR REGIONS AND NATIONAL ECONOMIES (MACRO LEVEL)

Economic benefits from SLS/FLS also accrue at the macro-economic level in terms of increased flows of trade, job creation as research from Canada demonstrates. A research paper from the Conference Board of Canada will be examined, and a paper from News Brunswick will be studied at length. SLS also contribute to the political and socio-economic rise of impoverished lower classes, as a study from India will demonstrate.

CANADA

CONFERENCE BOARD OF CANADA STUDY

Citing Christofides and Swidinsky, in the 2013 study *Canada, Bilingualism and Trade*, Alan Arcand of the Conference Board of Canada acknowledges research demonstrating the economic benefits for the individual and explores how this might generalize at the national, or macro-economic, level using Canada as an example. As previous economic research had established that having a

The Conference Board of Canada calculated that Canada’s imports and exports were US\$3.3 billion higher in 2011 because of the French language skills of Quebec and New Brunswick.

common language increases trade between two countries, Arcand hypothesized that Quebec and New Brunswick, having high rates of bilingualism, would be able to trade with more countries than other provinces with lower rates of bilingualism (Arcand 2013: 4).

Using two different empirical techniques, Arcand establishes that the French language skills of Quebec and New Brunswick increased their

trade with foreign French-speaking countries. Using location quotients, and calculated using 2011 trade data, Arcand calculated that the FLS of these two provinces increased exports by US\$1.7 billion and imports by US\$7.2 billion.

Using gravity equation analysis, Arcand calculated that Quebec and New Brunswick’s trade with French-speaking countries would be 65% higher than with countries that do not speak French. Using 2011 data, Canada's nominal exports and imports were both US\$3.3 billion higher due to the FLS of Quebec and New Brunswick. Thus bilingual language skills provide not only private benefits to the individual, but also public benefits to the country in the form of increased trade (Arcand 2013: 35).

NEW BRUNSWICK STUDY

In contrast to the Conference Board, Desjardins and Campbell take a sector by sector micro-economic approach in their 2015 study for the New Brunswick Office of the Commissioner for Official Languages. The study shows that high rates of bilingualism have proven economically advantageous to New Brunswick in specific sectors and occupational categories. Sector results are summarized below.

While some results may be replicable in other provinces or regions, others may not, as a profusion of national call centres, for example, would only serve to undermine one another. Location quotient analysis was also used to compare the national average to various urban centres in New Brunswick (Desjardins Campbell 2015: 20).

ECONOMIC BENEFITS BY INDUSTRY SECTOR

Customer call centres and other back office services, finance and insurance, language services, interprovincial and international trade and investment, tourism, education and immigration have all benefitted from New Brunswick's bilingual status. They also compared the public and private sectors of various industry sectors and found that several, primarily private sector, industry categories hire more bilingual workers than the public administration sector in the province (federal, provincial and municipal).

A recent New Brunswick study noted that:

- For every bilingual job created in the customer contact and back office industry, another two unilingual jobs were created.
- The sector has generated \$1.4 billion in interprovincial and international exports annually for the province.
- Private sector industry categories hire more bilingual workers than the public administration sector in the province.

CUSTOMER CONTACT AND BACK OFFICE INDUSTRY

Desjardins and Campbell note that the customer contact and back office industry has generated \$1.4 billion in interprovincial and international exports annually, with major international corporate clients, such as ExxonMobil, Xerox, IBM, FedEx, UPS, and Unilever, setting up in the province. Interestingly, of the 15,400 workers in this sector in the province, only 32% are bilingual (English and French), with the rest either English-only speakers (66%) or French only (2%). For every bilingual job created in the sector, an additional two jobs requiring English language skills were created (Desjardins Campbell 2015: 8).

FINANCE AND INSURANCE INDUSTRY

New Brunswick has attracted a number of Canada's national banks and insurance carriers for back office support and customer call centres because of its bilingual workforce. Employment by insurance carriers has increased 55% between 2006 and 2013 (Desjardins Campbell 2015: 5, 23).

LANGUAGE SERVICES INDUSTRY

New Brunswick has the second highest concentration of translators, terminologists and interpreters in the workforce after Quebec, adjusted for population size (Desjardins Campbell 2015: 21). In addition to the private sector workers recorded in Statistics Canada data, the province has specialized university centres working in the field, including the Canadian Institute for Research on Language Minorities, the Centre de traduction et de terminologie juridique, and the International Observatory on Language Rights.

INTERPROVINCIAL TRADE WITH QUEBEC

Disproportionate to its size, New Brunswick benefits from proportionately more trade and investment per capita with Quebec, and exports more professional services to Quebec than other provinces due to bilingualism. Between 2007 and 2011, New Brunswick generated nearly \$1.2 billion of services exports to Quebec, ranking second to Ontario on a per capita basis (Desjardins Campbell 2015: 5).

TOURISM

On a per capita basis, New Brunswick's tourism sector (accommodations and food services) ranked second to Prince Edward Island in attracting Quebec tourists, generating \$123.3 million in 2011, more than twice as much compared to Ontario and three times as much as Nova Scotia on a per capita basis (Desjardins and Campbell 2015: 6).

POSTSECONDARY EDUCATION AND IMMIGRATION

Despite having relatively high tuition fees compared to the Canadian average at \$6,324 per year (the fourth highest in Canada after Ontario, Saskatchewan, and Nova Scotia) (Statistics Canada, The Daily, 2014), New Brunswick ranks third nation-wide in terms of attracting interprovincial students to the province (Desjardins and Campbell 2015:6). The share of international students studying in the province's universities has increased by 53% between 2009 and 2013.

A significantly higher share of immigrants to New Brunswick speak both English and French: nearly a quarter of the 26,400 immigrants living in the province in 2006, twice the Canadian average (Desjardins and Campbell 2015:6).

INDIA: THE LANGUAGES OF BUSINESS AND POLITICS

India is a large parliamentary democracy that has successfully reduced political/linguistic and cultural tensions through language policies. The methodology used here is an example of using history to document political and economic improvements in oppressed minorities through democratic engagement and resulting socio-economic policies and programs. One of the ongoing policy goals has been to improve the socio-economic situation of lower castes, who are the most impoverished members of Indian society. Language policy has shifted in a fascinating manner in response to dramatic cultural, political and economic changes in post-independence India.

In an article comparing the benefits of bilingualism in India with English and/or Hindi, Sonntag (in Venice International University 2013) traces this evolution.

While English language skills in the post-independence era were limited to the urban, professional elites, the populist political system was used to champion India's regional languages, thereby steadily weakening the political hold of the elites on the policy-making decisions of the country. The economic reins of power on the other hand remained in the hands of the upper caste elite who continued to use English as the language of business. The policy response to this political reality has been very successful. In the political realm it has become advantageous, even necessary to be at least bilingual, if not plurilingual, in a major national language (Hindi and/or English), along with one's mother tongue in a local or regional language, in the Indian context of thousands of regional and local languages (Sonntag 2013: 1-16). She contrasts the use of Hindi and regional languages in the political sphere with English as the language of business, and raises the socio-political dimension of Hindi vs. English. Spreading the use of Hindi and major regional languages as the languages of national politics (participatory democracy) has played a key role in enabling lower castes to engage and influence policy-making to their benefit (Sonntag 2013: 3).

Bilingualism or plurilingualism in India has had direct socio-economic benefits for the traditionally impoverished lower castes:

- through the intermediary of their plurilingual MPs pressing for reforms in the national Parliament;
- with the rise of international demand for low-cost English-speaking STEM workers, bringing off-shore jobs to southern India.

Interestingly, Sonntag cites a study by Spary which found that MPs learned English or Hindi in order to be able to work with fellow parliamentarians, and thereby advance the cause of their constituencies, while they would often use their regional "major" language (such as the official language at their state level), when speaking in Parliament on an issue of local interest likely to be picked up by their regional media (Spary 2010, cited in Sonntag 2013: 3). In the Indian case bilingualism or trilingualism has had direct socio-

economic benefits for the traditionally impoverished lower castes, through the intermediary of their plurilingual MPs engaging in the national Parliament.

Following this, economic liberalization policies begun in the early 1990s and began to work at counter-purpose to the democratizing political process. “In the new economy of the liberalized market, the language divide, characterized by a class/caste chasm, traditionally manifested itself between the English-speaking best and the vernacular-speaking rest.” (Sonntag 2013: 5). This began to change in the late 1990s when the technology boom in southern India led to international demand for a low-cost English-speaking workforce by the early 2000s, for the off-shoring of international business services to India, thus expanding the value of English to other classes of Indian society. In contrast to past political demands for the promotion of vernacular languages, lower classes are now demanding state support for English language classes for purposes of employment.

6. MARKET DEMAND FOR FOREIGN LANGUAGE SKILLS

The CIEP bibliography identifies a number of studies regarding corporate language practices and expressed demand. Some of these studies are surveys of employer views or of labour demand as expressed through job advertisements.

6.1 SURVEYS OF EMPLOYER VIEWS AND OF LABOUR MARKET DEMAND

WORLD-WIDE

THE ECONOMIST 2012 WORLD SURVEY OF SENIOR EXECUTIVES

The Economist Intelligence Unit (EIU 2012) undertook an opinion survey, of senior executives of large corporations world-wide, on language and cultural barriers, at a time when the world economy was still uncertain.

Large corporations world-wide have responded to the global slowdown by looking to grow their export and investment activity rather than retrenching.

They are adopting new ways of doing business, setting up transnational work teams, and requiring staff with greater foreign language and cross-cultural skills.

Contrary to expectations, rather than retrenching, the survey found that many companies have responded to the global slowdown by seeking markets abroad. While past recessions have led companies to retrench in order to reduce exposure to risk, most of the EIU survey respondents indicated that their companies are looking to grow their export and investment activity. They are seeking new ways of doing business, replacing traditional organizational structures with transnational work teams, with team members based in different markets. It goes without saying that these new methods of operating require greater attention to language and cross-cultural communication skills.

Findings were derived from questionnaires filled by 572 senior business executives, supplemented with 8 in-depth interviews with two independent experts along with CEOs from each of China, Brazil, India, Switzerland, UK and USA. The sample focussed on large corporations world-wide (53% with annual revenues over US\$500 million). Considering the study focussed on language and cultural barriers, the heavy weighting assigned to companies based in Europe might be attributed to their greater familiarity with the subject at hand (Europe 51%, Asia-Pacific 17%, North America 9%, Latin America 7%, and 16% divided amongst Eastern Europe, Africa and the Middle East). Half of the respondents were board members of their corporation (47%).

The findings reveal how large corporations were handling the recession in 2012:

- 89% of respondents expected to increase their number of foreign clients

- 81% expected to increase the number of foreign business partners or suppliers
- 78% expected to increase the number or size of transnational teams within their organization
- 77% expected an increase in the number of countries where their organization was operational (EIU 2012: Annex 20)

HIGH VALUE ASSIGNED TO COMMUNICATIONS AND CROSS-CULTURAL SKILLS

In this context of globalization, the employers surveyed indicated that skills in communications and in cross-cultural collaboration were essential for their company success. Companies which are active internationally increasingly expect that their employees have FLS. A majority of employers surveyed were of the opinion that the main obstacle to effective international collaboration was misunderstandings which related more to cultural, rather than strictly language, barriers. This is similar to the findings by the EC’s Directorate General of Enterprise and Industry (DGEI) study of European SMEs noted later in this paper.

“The survey findings reveal a corporate world that has at least recognized a new reality in which the right products and services must also now be allied with the necessary **cultural sensitivity and communications skills** in order for companies to succeed in markets away from home. However the views expressed in this survey by senior business executives world-wide also indicate that many organisations have yet to implement most of the measures for this to become reality.” (EIU 2012: 3)

Corporate executives believe that language difficulties have less of an impact on transnational communications than other factors.

Impact on transnational communications:

- Mediocre translation (23%)
- Linguistic diversity (27%)
- Different workplace norms (49%)
- Different cultural traditions (51%)

- Muddling through appears to work quite well.
- A large majority of respondents agreed that linguistic and cultural diversity was good for:
 - Innovation - 67%
 - Trade - 66%
 - Business performance - 64%

The senior executives recognized that the benefits of cross-cultural/multilingual teams greatly outweighed the language and internal cultural difficulties this involved (EIU 2012: 8 figure 4). A high proportion of executives (67%) were of the opinion that the multicultural nature of transnational teams promotes innovation, and that cultural and linguistic diversity within their organization opens up new commercial opportunities (66%) (EIU 2012: 9, 20). Furthermore, another 64% feel that transnational cooperation was a decisive factor in improving business performance over the past three years (EIU 2012: 8 figure 5).

With respect to language difficulties, respondents believed they had less of an impact on transnational communications than different cultural traditions or workplace norms:

- 27% cited linguistic diversity
- 23% listed mediocre quality of translation
- 51% listed cultural traditions between countries, and
- 49% listed different workplace norms

A willingness to cooperate across cultural and linguistic barriers was more important than poor language skills.

While most companies used “one single language” for corporate communication (usually the language of the company headquarters), when placed in the context of facilitating internal collaboration, they understood that this policy did not help their internal collaboration or their bottom line. A large majority of respondents, as noted earlier, understood, perhaps only instinctively

or anecdotally, that linguistic and cultural diversity, internal to the corporation, was good for innovation, trade and business performance (67%, 66% and 64% respectively).

This leaves the impression that senior executives are willing to tolerate language errors for the benefit of business. Eva Lavric made a similar finding in her 2012 study of European businesses and soccer teams. Muddling through appears to work quite well. A willingness to cooperate across cultural and linguistic barriers was more important than poor language skills.

TRANSBORDER COOPERATION

When senior executives were asked to select which factors facilitated internal collaboration within the organization:

- 43% selected the right mix of communication, language and business skills among employees
- 34% selected having good organizational structures in place, and
- 22% selected having team managers with cultural sensitivity (awareness)

However, one single language for internal communication, such as English, was selected the least, at 19%, by senior executives of multinational corporations to facilitate collaboration across organizational units.

Improving transborder communications is expected to improve external factors as well: relations with clients in foreign markets (55%), sales in foreign markets (43%), brand image and reputation in foreign markets (40%). A smaller, but not insignificant, share of respondents expected the greatest external benefits would benefit relations with foreign regulators (17%), supply chain relations (15%), relations with foreign investors (9%) and relations with foreign media (7%).

LANGUAGE AND CROSS-CULTURAL TRAINING PROVIDED BY COMPANIES

However, while most companies surveyed recognize the benefits that would accrue if they were to raise the transnational language skills of their employees, few of them implement necessary measures, such as language policies and programs (EIU 2012: 4). Forty-seven percent of respondents believed that their company did not provide sufficient training opportunities to improve the language and communications skills of their employees, and 40% believed that not enough emphasis was placed on recruiting candidates adapted to intercultural environments.

Most companies recognize the benefits of their employees' language skills. However:

- 47% of respondents believed their company did not provide sufficient language training
- 40% believed that not enough emphasis was placed on intercultural skills

EUROPE

European bodies have commissioned several business surveys related to language use, as have certain member countries. France's Lorraine region examines the use of FLS in foreign affiliates based in the region. Germany undertakes a regular labour market survey which includes language questions. Sweden undertook an employer survey on their views on the benefits of international experience. Switzerland examined the attitudes towards bilingualism and language skills in the Swiss post-secondary sector. As a predominantly English-speaking country in a multilingual European Union, policy thinkers in the United Kingdom have been assessing the British strengths and weaknesses in FLS and the impact on their competitive position compared to their trading partners.

Following these labour market and business surveys, online job advertisement surveys from Spain, Italy and Canada are reviewed.

ELAN 2006 SURVEY OF EUROPEAN SMES

In the 2006 ELAN survey of about 2,000 European SMEs, some of the reasons that respondents selected for their language difficulties were:

- Staff couldn't speak the language of the potential client
- Information enquiries or requests for quotes couldn't be responded to
- A lack of confidence in using the foreign language in question
- An inability to respond to the call at reception (by receptionist or agent)
- Errors in translation or interpretation
- A lack of cultural affinity for the market in question

(Cited in Hagen 2011: 5)

EUROPEAN COMMISSION 2010 SME SURVEY

The European Commission's Directorate General Enterprise and Industry (DG EI) branch examined the language practices of 9,480 small and medium-sized enterprises (SMEs) in 33 countries across Europe (European Commission 2010). This study covered SMEs involved in a broad range of activities, from direct exports, direct imports, foreign direct investment (FDI), subcontracting, and/or international technical cooperation.

Care was taken in the survey design to address weaknesses of some past EU surveys. Considering the wide range in size of countries in the survey, a disproportional stratified sample was used in order to ensure as representative a sample as possible for each country, in terms of company size and industry sector. Given that there are 24 million SMEs in the 33 countries represented, results were weighted to take into account the size, industry sector and countries represented. The major results are accurate within a confidence interval of 95%, plus or minus 10%. This was not always possible for sub-segmented groups, particularly for smaller countries or some industry sectors. Confidence for results at the highest, or EU level, on the other hand is much higher, within 1%, due to the larger sample size.

The study is useful for documenting the international context of European SMEs in a representative fashion. The study was able to note with confidence that:

- 25% of SMEs within the EU27 membership export, of which about half of these (13%) also export beyond the EU's internal market
- 29% of SMEs import, again with about half of these (14%) importing from outside the common market
- 7% of SMEs are involved in technical cooperation with a foreign partner
- 7% are a subcontractor to a foreign company
- 7% have foreign subcontractors
- 2% are active in foreign direct investment

The EC 2010 SME survey showed that European SMEs had a relatively higher level of international exposure compared to their North American or British counterparts.

This international exposure might create a higher awareness of foreign language needs.

This study also examined the language practices specifically of SMEs in border regions. They found that companies in cross-border regions trade more with each other, and speak each other's languages, however the survey concludes that this does not show that this acts as a stepping stone to exporting or importing further afield, such as to Russia, China, the Middle East or Japan.

These contextual factors serve to demonstrate the relatively high level of international exposure for this size of company (micro, small and medium), compared, for example, to their North American or British counterparts. This

kind of international exposure might also indicate a higher awareness of foreign language issues or needs.

FOREIGN LANGUAGES AS A BARRIER

Of the SMEs who were internationally active, language issues were not rated very highly as an internal barrier (2.2 on a scale of 1 to 5) to their international activities. This mirrors the findings by the EIU regarding large multinationals (see above). This lends support to the study's conclusions that companies who are active internationally generally perceive lower barriers than those who are not, including language barriers.

Being internationally active has strong correlations with higher sales turn-over, higher employment growth and level of innovation. As other studies have demonstrated, having staff with the right communications, language and cross-cultural skills are necessary components for this success.

BY INDUSTRY SECTOR

Of the 26 industry sectors studied, high shares of internationally active SMEs were found in mining (58%), manufacturing (56%), wholesale trade (54%), research (54%) and transport and communications (39%).

POLICY MEASURES SURVEYED

As part of the study, respondents were surveyed on their awareness and use of government programs supporting internationalization, most of them in support of export development more specifically. Awareness and use of government support programs are generally low, however internationally active SMEs are more aware of these programs (22% vs 10%). A selection of policy support measures by country was included in the survey; some of these with language-related measures are replicated in the Policy and Considerations section of this review.

LORRAINE REGION OF FRANCE

A study by the Observatoire régional de l'Emploi, de la Formation et des Qualifications de Lorraine (OREFQ 2010), on behalf of the regional development agencies of the region, studied the use of foreign language skills in partially or wholly foreign owned enterprises in the Lorraine region of eastern France, bordering on Germany, Belgium and Luxembourg (OREFQ 2010). This study of an important, economically active border region of France provides interesting insights on the language needs and practices of companies which are either fully or partially foreign-owned. In total, 27 different nationalities were represented in the range of foreign investments surveyed (OREFQ 2010:5).

The OREFQ undertook a survey of 635 subsidiary companies employing 53,528 workers. Of these, 239 companies responded, a response rate of 46%, employing 24,845 workers. The study found that two out of three participating companies (201) had regular contact with non-French speaking regions or countries, and required use of FLS. Of these, 71% were the French headquarters of the

company. Secondary offices, such as field offices or distribution centres focussing on the French market were much less likely to use FLS (51%) (OREFQ 2010: 10).

SECTOR REPRESENTATION

Manufacturing sectors in Lorraine requiring FLS:

- Electrical and electronic machinery and equipment
- Transportation equipment
- Food processing
- Other industrial products

The manufacturing sector is highly represented in this survey of use of foreign language skills (49% of companies) (OREFQ 2010: 6). This is not surprising considering the importance of industry to the region. Types of manufacturing represented are manufacturing of electrical and electronic machinery and equipment, manufacturing of transportation equipment, processed foods, and manufacturing of other industrial products.

The services sector was also highly represented (43%), particularly in whole-sale, retail and repair of automotive equipment, transport and warehousing, scientific and technical activities and administrative and support services, information technology and communication, and construction.

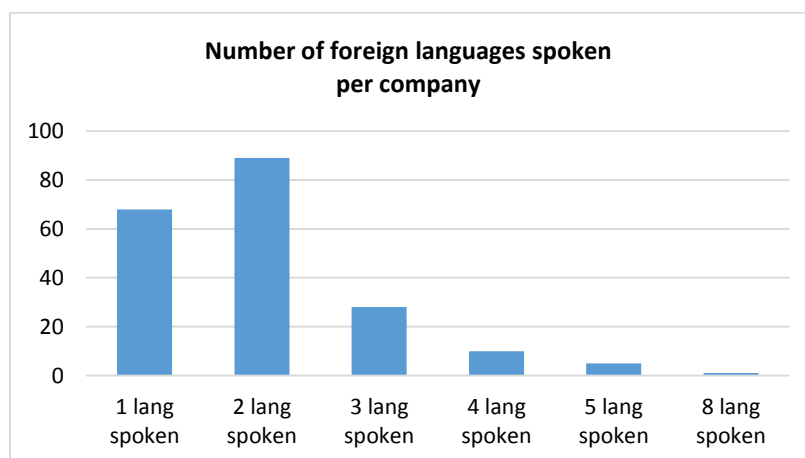
Services sectors in Lorraine requiring FLS:

- Wholesale
- Transport and warehousing
- Scientific/technical
- Admin and support
- IT and Communications
- Construction

Primary industries made up 7% of companies represented, in energy, water and effluent management, agriculture and fisheries.

LANGUAGES SPOKEN

As this OREFQ study is of French subsidiaries which are foreign controlled, strategic and policy decisions would most likely be made elsewhere. Nevertheless, the table below outlines the broad range of languages used by respondents beyond the immediate neighbouring countries.



OREFQ 2010: 11

The next table found below illustrates that amongst the different languages used, German is used by 159 companies (79%) and English by 153 (76%) of companies, while 18% of companies use Italian and 13% use Spanish (OREFQ 2010: 11). Interestingly, for foreign subsidiaries established in a border region, 89 out of the 201 companies, or 44%, actually use two foreign languages regularly on the job, one likely the language of the corporate head office (possibly German), and the other the language of the most important foreign market, possibly English, or vice-versa.

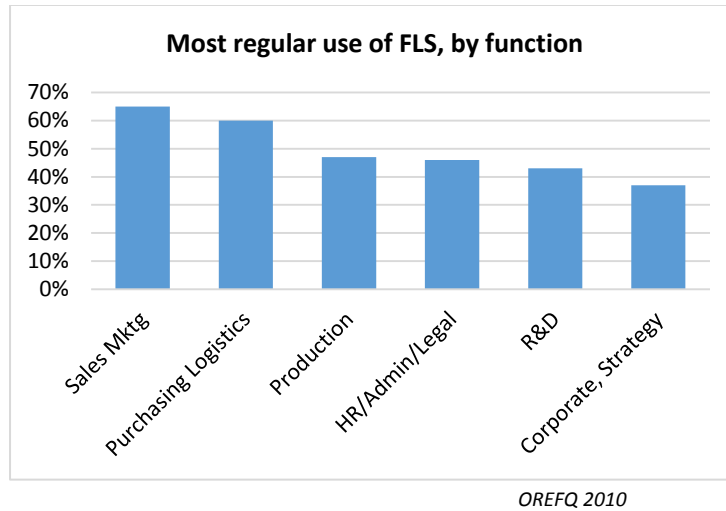
Foreign languages used on the job in foreign affiliates

Language	No of companies	Percentage of companies responding (out of 201)
German	159	79%
English	153	76%
Italian	36	18%
Spanish	27	13%
Luxemburgish	7	3%
Chinese	4	2%
Dutch	3	1%
Russian	3	1%
Portuguese	2	1%
Polish	2	1%
Irish	2	1%
Arabic	2	1%
Czech	1	0.5%
Flemish	1	0.5%
Finnish	1	0.5%

OREFQ 2010: 11

FLS USE BY FUNCTION

When comparing usage of FLS by function, sales and marketing, and purchase and logistics are the two areas which use FLS the most. This is similar to Grin's findings in the LEAP study of Switzerland. The wide array of company departments which regularly use FLS demonstrate that FLS are of importance for a greater variety of occupations and education levels than is commonly assumed.



FLS USE BY OCCUPATION

The occupations which most require skills in the language of the mother company are company managers (83%), followed by qualified staff (62%) and skilled technicians (48%). Unskilled white collar workers or blue collar workers, whether skilled or unskilled, are less likely to require FLS in the company’s designated language (12%, 6% and 10% respectively). As well, like Jonsson found in Sweden (2010) and the BCC found in the UK (2011), both described in this section, time spent studying or working abroad is seen as a positive (54% of companies responding) (OREFQ 2010: 16).

LANGUAGE TASKS PERFORMED BY LOCAL STAFF

Foreign-owned companies rely heavily on local staff for oral interpretation (87% of 201) and written translation of documents (84% of 201) (OREFQ 2010: 13). European employer surveys demonstrate that employers find the technical language competence insufficient for their industry in external translation agencies. In addition, it would be worth considering that, for strategic reasons, companies may prefer to have strategic corporate information translated and interpreted in-house.

When asked in which type of communication FLS were employed, telephone and electronic messaging were the most frequent (all for telephone, 85% for messaging), followed by mail (72%), conferences/meetings and conversations/interviews (63% and 58% respectively) (OREFQ 2010: 12). OREFQ raises the issue that the forms of communication which are most demanding for FLS are those which require rapid speaking and writing skills (phone and messaging), while not receiving any non-verbal communication or other feedback to assist with the communication process.

Types of communication in which foreign language skills were most often employed:

- Telephone (100%)
- Electronic messaging (85%)
- Formal correspondence (72%)
- Meetings (63%)
- Conversations (58%)

Next in frequency are the types of formal communication which would allow a better quality of communication, either due to the greater time invested in the drafting process (letters), or with face-to-face communication, allowing for interactive communication to assist with clarifying understanding (meetings and conversations/interviews). Finally, those situations which would require the

Tasks carried out by local staff of foreign companies using FLS:

- In-house interpretation (87%)
- In-house translation (84%)
- Technical, legal and corporate documents (72%)
- Websites (61%)
- Sales, marketing and advertising documents (41%)

most polished and accurate forms of communication (work-related documents and public interventions, such as speeches) are actually the least frequent, 32% and 18% respectively. Those forms of communication which are the most demanding in terms of FLS, requiring spontaneous and unaided communication are also the most frequent, confirming the long-held recommendation of language teachers, to stress oral communications skills over grammar and writing.

Nevertheless, accurate writing skills are very important as 72% of the companies relied on the local subsidiaries to produce company documents, whether notices, contracts, technical specifications, reports, corporate newsletters etc. (OREFQ 2010: 13). In addition, 61% of the subsidiaries maintain websites where at least a part of it is in one or several foreign languages (often English, often

accompanied by German and/or Italian). Finally, personnel in 41% of companies work on marketing and advertising materials, such as brochures, flyers or catalogues, which need to be written in possibly up to three foreign languages.

GERMANY

In Germany, FLS are a highly marketable skill and absolutely essential for workers in many sectors of the economy (Hall 2008). In an increasingly globalized and competitive world, increased educational and language qualifications are expected in the German workplace, along with the ability to work at a more advanced level of foreign language skills. A major government labour force survey of 20,000 working Germans is carried out by the Federal Institute for Vocational Education and Training (BIBB) and the Federal Institute for Occupational Safety and Health (BAuA),

Similarly to the Canadian Census questions regarding use of Canada's official languages on the job, the German national survey investigates, *inter alia*, foreign language requirements of German workers. This survey, due to the breadth of the data, is able to make reliable comparisons of stated needs for FLS for all sectors of the economy, by occupation and other smaller groupings.

- In 2006, one in six working Germans needed advanced foreign language skills for their job.
- One third required basic competence.

In an analysis of the 2006 survey, Hall found that one in six working Germans (16%, or some 5.3 million workers, up from 10% in 1998-1999) needed advanced foreign language skills (FLS) for their job. One third (33%, or another 11 million workers) still required basic competence, while half of working Germans (51%) did not require any FLS (Hall 2008) (Hall 2008).

LANGUAGES CHOSEN

According to the German Labour Force Survey, English is the most commonly required foreign language, with 22% of workers indicating they required a basic level, 16% required oral and writing skills and 7% required fluency, for a total of 45% requiring some level of English language skills (see table below). Since the survey is drawn from a random sampling of the full German labour force, it is noteworthy that the English requirement is so high, while other languages are so low, particularly from neighbouring Francophone or Dutch-speaking countries or Poland.

Foreign language(s) (either basic skills or advanced knowledge) required for the job

German labour force	(%) of all workers requiring FLS for their current job
All foreign languages	49
English	45
French	7
Russian	3
Spanish	2
Turkish	2
Italian	2
Polish	1
Other	4

Hall 2008: 225

BY EDUCATIONAL REQUIREMENTS, SECTOR AND COMPANY SIZE

Foreign language requirements also vary according to job level and industry. In positions with no educational requirements, only three percent needed knowledge of a foreign language, while *40 percent of workers in positions requiring a university degree faced foreign language requirements*. Sectors most requiring foreign languages were trade and commerce and the hospitality and food sector. *For those facing a foreign language requirement, 93% required English, 33% required French, and lesser numbers required Russian, Turkish, Spanish, Polish and other languages.*

Due to the high number of workers requiring English language skills, it was possible to undertake further research with this large sample in more detail, examining data by size of company, industry and occupation. As to be expected, the larger the company, the more likely FLS are required (Hall 2008: 221).

English language skills requirements by company size

Size of company	Oral and writing English skills	Advanced skills in English
Firms with more than 500 employees	23%	12%
Medium-sized enterprises (50-499 employees)	16%	7%
Small-sized enterprises (1-49 employees)	14%	6%

Hall 2008: 221

KNOWLEDGE-INTENSIVE OCCUPATIONS

Knowledge-intensive occupations, including professions in science, technical fields, media and the arts, law and administration, have the highest requirements for English language skills (Hall 2008: 223). In another regular national survey, of university graduates, almost half of all university and college graduates have consistently indicated that FLS were “important or very important in their daily professional lives” (Degener, January 2013: 2). Nearly 75% of engineers and 90% of scientists in the pure sciences require FLS. Kolja Briedis, of the Higher Education System, speculates that “...many natural scientists spend their initial professional years in the post-doctoral period where they read international literature and take part in international conferences.” (Degener 2013: 2).

- In Germany, knowledge-intensive occupations have the highest requirements for English language skills. They include professions in science, technical fields, media and the arts, law and administration.
- Nearly 75% of engineers and 90% of scientists in the pure sciences require FLS.

Conclusions to note from the German studies:

- English is seen as a lingua franca (common language), not only for international trade, but also for jobs within Germany.
- French is the second most important foreign language.
- Other languages reflect Germany’s geographical location in central Europe, the long history of Turkish guest-workers, as well as its reach to other continents.

SWEDEN

A major study of Swedish public and private sectors employers has examined their views on the value of work or study abroad and FLL in hiring decisions for recent graduates (Jonsson 2010). Prior studies were reviewed initially for findings and methodology. The decision was made to study both public and private sector employers, and ensure a representative selection by organization size and industry sector. Out of 4,764 organizations contacted, 973 final questionnaires were received, representing a response rate of 21%. A confidence interval of 95% was used in order to account for any possible correlations in views between different skill sets.

VALUE PLACED ON “SOFT SKILLS” RELATED TO FLL AND TIME SPENT ABROAD

The findings of this study show that, while international experience and FLL are not often essential for recruitment purposes, they are nevertheless seen as a clear advantage over other candidates, for both public sector and private sector employers.

Through its methodological design, the study was able to carefully demonstrate that skills most valued by employers are those most acquired by students who have spent time abroad (i.e., social and communications skills, adaptability, foreign language skills). These are also the skills which most correlate with the cognitive and psycho-social benefits of bilingualism outlined previously in this paper.

The type of skills most valued by Swedish public and private sector employers are those most acquired by students who have spent time abroad:

- Social and communications skills
- Adaptability
- Foreign language skills

VERY LOW RECOGNITION OF FOREIGN EDUCATION CREDENTIALS

In terms of studies acquired abroad, the findings of this study are similar to others, in that there is little knowledge or understanding of foreign educational systems (c.f., studies from Lorraine and UK). A Swedish education ranks very highly for Swedish employers. Respondents indicated that a Swedish degree combined with international work or study experience is the most attractive option.

EMPLOYERS HIGHLY VALUE WORK EXPERIENCE

The Swedish study suggests that post-secondary education policy makers encourage students to do more international internships and work experience since employers place high value on work-life experience.

As employers place high value on work-life experience, the study's authors suggest that higher education decision-makers encourage students to undertake more internships and co-op work experience abroad. Placements taken abroad would increase the range of skills developed which are demonstrably valued by Swedish employers. The study also notes that the proportion of Swedish postsecondary students studying or working abroad is very low and encourages education authorities to set up a goal to increase this ratio, as this would be positive from the perspective of both employers and students.

SWITZERLAND

Similar to the German findings, Meyer et al note the increasing internationalisation of Swiss postsecondary programs and curricula, the increased mobility of students and academics, and the increasing numbers of international students, which all combine to make the need for FLS even more pressing (Meyer et al, in Ghisla and Luedi, 2013). In consequence, the association of Swiss universities created an advisory body to increase the teaching of foreign languages to non-language specialist students, entitled the *Enseignement des Langues dans les Hautes Écoles en Suisse*. The advisory body established a number of dedicated language centres to teach foreign language courses for students of a variety of disciplines.

The association of Swiss universities created an advisory body to increase the teaching of foreign languages to non-language specialist students, entitled the *Enseignement des Langues dans les Hautes Écoles en Suisse*.

To examine these issues, the University of Basel undertook a mixed, qualitative and quantitative study investigating the attitudes and behaviours towards plurilingualism and multilingualism of its university students taking the extracurricular FL courses.

- Swiss students found that mastering a foreign language in an academic context is more demanding than in most other contexts.
- Students were also conscious that languages which may be important after graduation were set aside during their studies, when English is emphasized as the language of research and instruction.

Survey results of the 745 student respondents demonstrated knowledge of a wide variety of foreign languages at varying levels of proficiency – 42 languages ranging from Catalan, Estonian, Kurdish, Russian and Turkish (Meyer et al 2013: 89). Forty percent of students had FLS in four languages, the most common among the traditional languages taught: French, English, German, Spanish and Italian. These were also the most popular being taught in the university language centres. In focussed interviews, findings show that students found mastering academic language is more demanding than in most other contexts.

They also understood

that languages which may be important after graduation are being set aside during their studies, when English is emphasized as the language of research and instruction. Students lamented neglecting their hard-earned mastery of other FL, such as French and Spanish, learned in school.

Highly plurilingual students in Switzerland:

- readily accepted the utilitarian advantages of foreign languages
- intimately understood the richness and complexity of knowing other languages,
 - as a window into other cultures, and
 - as other ways of knowing and conceptualizing knowledge.

A small group of highly plurilingual students, often with family histories of plurilingualism or of migration patterns was interviewed in more depth. While they readily accepted the utilitarian advantages of foreign languages, they also intimately understood the richness and complexity which knowing other languages provided, as a window into other cultures, and other ways of knowing and conceptualizing knowledge.

“When you have another language, you don’t simply have the translation – you have another culture, other ways of expressing ... So if I’m learning another language, it’s as if I’m building another life.” (Meyer et al 2013: 90).

The students were also well aware of the ties between language barriers and knowledge barriers. For efficiency’s sake, many restricted themselves to researching in one or two languages, while remaining aware that they were thereby limiting their knowledge base. In response to student concerns, a new course was developed to help students develop the necessary mental gymnastics and become accustomed to using up to four foreign languages in a given setting, such as at a conference or meeting (which is commonplace in Europe). The pilot course focussed on two of the Swiss national languages: French and Italian, in addition to English as lingua franca, and German as the background (or mother tongue) to be used for organizational and administrative communications. The course focussed on teaching the use of task-based communications in multilingual settings (typical in academic, professional and social or political contexts); providing the students with opportunities to practice communicating across many languages in close succession; and practicing sticking to one language in which the student may be least proficient as this may sometimes be necessary.

In a related Canadian context, federal science-based departments and agencies have raised the issue of the predominance of the use of English in scientific conferences and journals, and the need to explore how to increase the use of French.

UNITED KINGDOM

BRITISH CHAMBER OF COMMERCE REGULAR SURVEY

In a large biannual survey of over 8,000 members, the British Chamber of Commerce (BCC) revealed that knowledge of FLS, or lack thereof, affects decisions about whether to export, and to where. In 2013 over half of respondents indicated that they did not have the FLS required to internationalize. The largest language deficits were for the fast growing markets – Russian and Chinese.

Beginning from the position of the need to promote exports/international trade amongst British businesses, the BCC recommends to re-establish foreign language learning as core subjects in the British school curriculum, as well as in workplace training.

UK NATIONAL EMPLOYER SKILLS SURVEYS

Employers’ views on the British shortage of foreign language skills are raised in the biennial National Employer Skills Surveys (NESS) carried out by the UK Commission for Employment and Skills (UKCES) (Tinsley 2013). In the 2011 NESS survey, employers attributed 16% of their total skills shortages to a shortage of FLS available in the British labour market, a number which has remained fairly steady since 2005, indicating a persistent problem (Tinsley 2013: 44).

In response to a question regarding the skills deficiencies of their current employees, employers across the UK indicated that their staff skill deficiencies in foreign languages made up 9% of total skills shortages. In England, the most internationally oriented of the four UK member-states, in 2009, employers indicated that deficiencies in FLS made up a 13% of total skills shortages (see table below).

UK employers' views on the importance of FLS compared to other skills shortages

Shortage of foreign language skills as a share of:	2011	2009	2007	2005
Total skills shortages in the British labour market	16%	18%	12%	13%
The skills deficiencies of their current staff	9% (whole of UK)	13% (England)	9% (England)	9% (England)

Tinsley 2013: 44

EMPLOYMENT ADVERTISING FOR FLS

One means by which researchers have assessed the demand for FLS is to study a sample taken from online job advertising databases by using keywords related to FLS. UK studies of this kind have found that only a small proportion of jobs where FLS are required by employers relate to specialist language positions. In a sampling study of job ads in major UK job search engines, Mulkerne and Graham (2011) found that only 4% of all job ads indicated FLS as a requirement, and another 9% of jobs where FLS were “desirable but not essential.”

In a follow-up survey in 2012, Graham noted that specialist linguist roles, such as interpretation & translation, made up only 5% of job ads requiring FLS. Not all of these jobs were in the traditional language service industry; some were in the IT gaming industry and the legal sector. Teaching and tutoring positions made up another 3% of ads (Tinsley 2013: 45). However, 34% of ads listed FL requirements for positions in a wide variety of other fields, notably sales and customer relations (12% each), marketing/public relations and client relations (3% each) and finance/accounts and business development (2% each).

From many business opinion surveys, such as of the BCC and the EIU, it is well known that business owners and employers recognize the benefits of FLS, - more often as “desirable” than “essential,” - to a much greater extent than what is found in the job ads sampling. Almost three-quarters of British employers in the annual Confederation of British Industry (CBI) survey responded that foreign language skills were “desirable” (72%) (Tinsley 2013: 46), while FLS were included as requirements in only 2% to 12% of ads posted, for a total of 42% of all ads. It appears that the generally positive perceptions of employers of FLS don't always end up reflected in tasks carried out by human resources, such as drafting job descriptions or job notices.

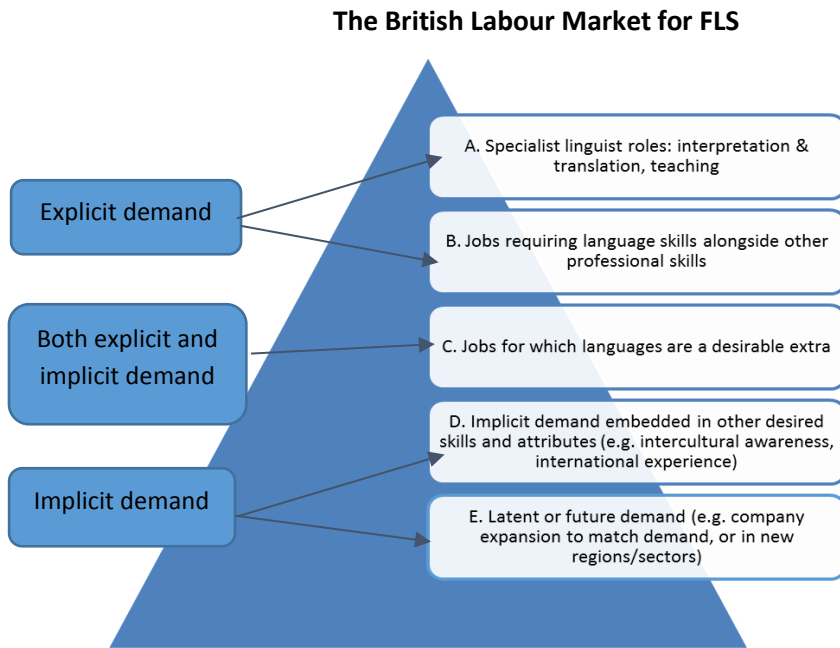
Tinsley asks how UK employers' perceptions of language needs compare with those of their international counterparts. Many of their European counterparts value foreign language skills as high or higher than British employers with Sweden at 81%, Italy 77% and Germany 70% (Tinsley 2013: 47).

THE VALUE OF INTERNATIONAL WORK EXPERIENCE

UK companies seek out foreign graduates and graduates from other parts of Europe, as they perceive that they have higher educational standards with respect to language training (Tinsley 2013: 54). The Council for Industry and Higher Education (CIHE) undertook a survey of senior managers and CEOs of top British companies on the FTSE 100 and found that they are increasingly multilingual, which is raising expectations that new hires do the same. The Council recommends to business that they develop more international work opportunities for their recently graduated employees in order to demonstrate first-hand the value of international work experience. The UK Government and universities are asked to promote and facilitate foreign language skills and international work/study experience to students, while students themselves are encouraged to appreciate how much more competitive the recruitment for top international jobs has become, and how critical a global mindset is to top global employers (CIHE 2008: 5).

THE STRUCTURE OF THE BRITISH JOB MARKET FOR LANGUAGES

Tinsley reviewed the evidence from the range of British studies and surveys and concludes that the British labour market for languages is both broader than expected, and includes implicit and future demand, both of which are very difficult to estimate (see figure below).



Tinsley 2013: 55 Fig. 10

“... UK language skill needs are frequently underestimated by employers who avoid rather than address language barriers, and (also) in skills surveys ... Employers who are aware of their needs meet them in other ways: through training or by recruiting foreign nationals.

However, evidence which links language skills to improved business performance and penetration of new markets is strong. This calls for a strategic approach to stimulating demand as well as supply, and support for better management of language skills by businesses in order to derive the associated benefits.”

Tinsley: 2013: 55

LANGUAGES OF PRINCIPAL INTEREST

Tinsley examines from the perspective of current and future demand for FLS. Based on the annual surveys of the Confederation of British Industry (CBI), in terms of current demand in the UK, French, German, Mandarin/Cantonese, Spanish and Polish are the top five requested languages (Tinsley 2013: 56).

48% of British employers need French, German and Spanish language skills.

Forty-eight percent of total demand is for French, German and Spanish, which are also the languages most frequently taught in British schools and universities, along with Italian.

- The demand for new languages is not instead of, but *in addition to*, the European languages traditionally taught.
- There is an increased demand for multilingual employees:
 - Who speak BRIC languages (Brazil, Russia, India and China)
 - Who speak French, German, Spanish and Italian.

Recruitment patterns also show a strong bias towards French, German (sometimes both of these) and Spanish, at 57% of job ads requiring foreign language skills. Ninety-six percent of vacancies require a European language, despite the fact that over 25 different languages were posted in job ads in 2011, and 47 different languages in 2012. The top 15 languages requested stayed the same in 2011 and 2012. Tinsley emphasizes that the demand for new languages is not instead of, but in addition to, the traditional languages of the large European economies. (Tinsley 2013: 56). While demand for the languages of the BRIC countries (Brazil, Russia, India and China) and other emerging economies is rising, the need for staff speaking French, German, Spanish and Italian continues, thus increasing the demand for multilingual employees speaking a range of languages.

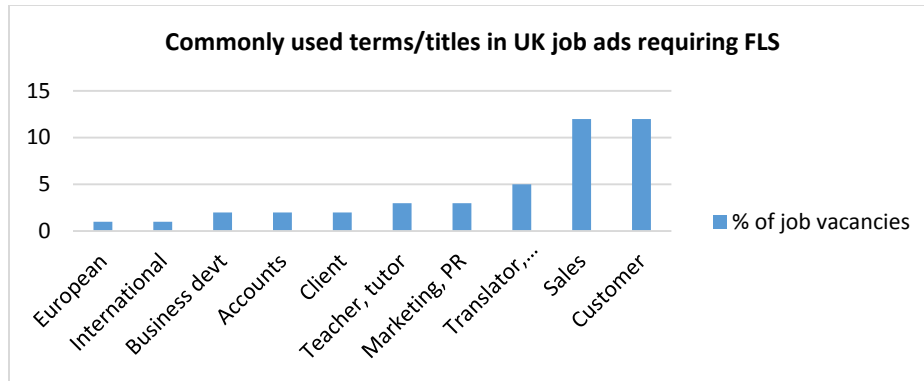
Tinsley's analysis of employer demands for FLS is encouraging:

“Another finding of this survey was that companies and organizations going beyond England operate multilingually. They do not tend to restrict themselves to using just one or two foreign languages; once the benefits of going beyond English are perceived, they employ as wide a range of languages as possible.” (Tinsley 2013: 58)

While Mulkerne and Graham's job ad sampling shows that French and German are by far the leading languages in demand in the UK, a wide range of languages are needed by British employers, and Chinese dialects have particularly risen in importance (2011: 6-7). Nevertheless, European languages are overwhelmingly the most requested in online job ads. In their analysis of 1000 job advertisements online, Mulkerne and Graham found more than 2000 requests for 20 different languages over a period of three months.

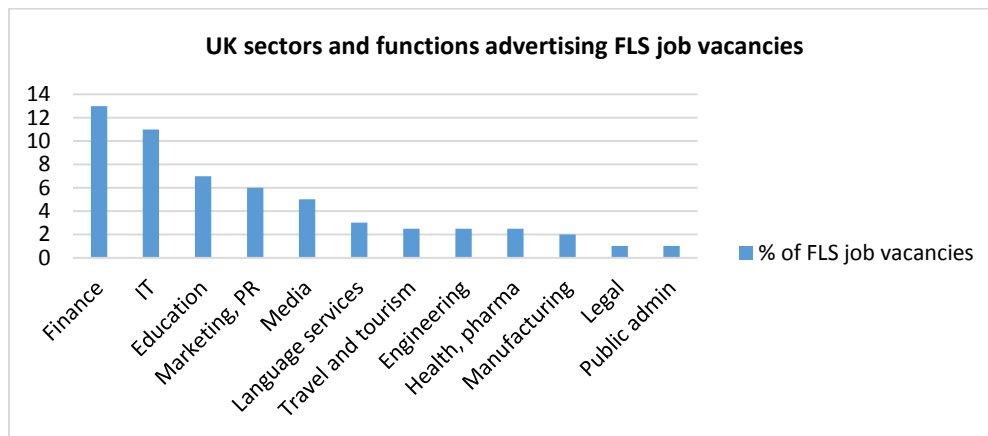
FLS NEEDS BY SECTOR

Of 732 job vacancies in Sales and Trading needing FLS, 163 required French (22%) and 166 (23%) required German. A follow-up job ad survey by Graham 2012 uncovered a range of language related terms or titles in job vacancies requiring FLS (Tinsley, Appendix 2, Figure 1). Interestingly enough, the keyword “exports” featured in less than 1% of job roles, however “sales” and “customer” were each mentioned in 12% of FLS job vacancies.



Tinsley, Appendix 2, Figure 1

Thirty-five different sectors advertised for jobs with FLS within the 3-month research period. The highest level of demand was in the Finance sector (13%) followed by IT (11%) (Tinsley 2013 Appendix 2, Figure 2). Another 12% of FLS job vacancies did not state the sector, typical of ads by recruitment agencies where the client is confidential (see table below).



Tinsley, Appendix 2, Figure 2

The fact that FLS are demonstrated as an essential requirement for a wide range of jobs is key intelligence for ministries of education and skills development, as well as for guidance counsellors in high schools and postsecondary institutions working with students of all strengths and socio-economic levels.

COMMUNITY LANGUAGES (HERITAGE/IMMIGRANT LANGUAGES)

Tinsley spends some time examining the supply of FLS coming up through the British education system (see Chapter 4). One of her interesting findings on the education system is regarding the languages of immigrant and ethnic communities, called “community languages.” Tinsley finds a paucity of language courses offered in heritage languages. She cites a British report indicating that over 300 languages were in use in London’s schools (Grant, Multilingual Capital: the languages of London’s schoolchildren, 2002). Despite many initiatives since then, eight years later it was noted that there were no postsecondary degree courses available in the four most widely spoken community languages: Urdu, Cantonese, Panjabi and Bengali.

There are many barriers to professional training in community languages in the UK, not only for teaching but also for translation and interpreting, in important fields such as justice, policing, health and social services (Tinsley 2013: 40). This is an issue for under-reported job sectors, specifically the justice and health sectors. This could be a concern in the Canadian context as well.

ASSESSING FLS DEMAND BY BRITISH BUSINESS AGAINST SUPPLY OF STUDENTS GRADUATING WITH FLS

Tinsley systematically examines the demand for FLS by British business along with the supply of students graduating with language skills, and finds that an ongoing insufficient supply is discouraging British employers from hiring, which is creating a vicious cycle of monolingualism. In fact, Tinsley finds that British employers are bringing foreign graduates from overseas, both Europe and further abroad, to answer to their foreign language needs.

An ongoing insufficient supply of young graduates with FLS is discouraging British employers from hiring local candidates. This is creating a vicious cycle of monolingualism.

It is worth investigating whether the same is true in Canada.

In a Europe-wide test of FLS for high school students, the European Survey on Language Competencies, students in England learning a foreign language (either French or German) did more poorly than their European counterparts.⁶ The tests were taken by students in their eleventh year (equivalent to grade 11), at about 15 years of age, in autumn 2011: 1,444 students studying French and 1,428 studying German, about half of the total cohort taking these subjects as part of their General Certificate of Secondary Education (GCSE) examinations (equivalent to a CEGEP level diploma) (Tinsley 2013: 95).

Rated according to the CEFR levels, the test results found that, for both groups of students, 30% did not even achieve the A1 standard, defined as “a basic user who can use very simple language with support (Tinsley 2013: 96) (see table below). This is particularly discouraging because these students would be taking their GCSE examination in French or German later the same year. In fact, only 9% of the students taking French, and 6% of those studying German, achieved the CEFR level B1 or higher, that is “an independent language user who can deal with straightforward, familiar matters.” (Tinsley 2013: 96).

Common European Framework of Reference for Languages

CEFR level	Definition
A1	a basic user who can use very simple language, with support
A2	a basic user who can use simple language to communicate on everyday topics
B1	an independent language user who can deal with straightforward, familiar matters
B2	an independent language user who can express him/herself clearly and effectively

Tinsley 2013: 95

Tinsley also finds that language training in the British school system does not adapt to new economic trends, such as increasing trade with emerging countries for example. Language training is rarely provided with specialized degrees such as engineering, geology or science, fields which often have an international dimension. Very few languages are widely offered in schools and postsecondary institutions, although a variety of languages are needed by both the public and private sectors.

Language training in the British school system is rarely offered in specialized fields which often have an international dimension, such as engineering, geology or science,

There is an important level of demand for language skills in the United Kingdom, and it is even higher in continental Europe. A strong indication of the extent of the need for competence in foreign languages in the UK comes from the annual employer surveys by the Confederation of British Industry (CBI) and Pearson on trends in education and skills in the workplace (Tinsley 2013: 43). The 2012 survey, based on responses from 542 companies, found that

⁶ European Commission, First European Survey on Language Competencies, Final Report, 2012.

nearly three-quarters of UK private sector employers (72%) saw a need, or at least a benefit, in having foreign language skills in their business, particularly in helping build relations with customers and suppliers. Only 28% said that they had no need at all for FLS.

In another analysis of the 2010 CBI survey, Mann notes that 56% of employer respondents were “dissatisfied” with the FLS of graduate recruits, while only 3% were “very satisfied” (Mann 2011: 8). Similarly, 55% were dissatisfied with graduates’ level of international cultural awareness. Supplementing this with data from the large-scale National Employers Skills Survey (NESS) on skills shortage vacancies across the country, of the 63,000 skills shortage vacancies in England in 2009, 18% of these (or 11,350 vacancies), in a wide range of industry sectors, noted FLS as among the skills lacking in British applicants. While, as Tinsley notes, employers can fill these vacancies with EU or overseas applicants, it also serves to demonstrate the additional jobs where British candidates with the requisite FLS would have additional employment opportunities (Mann 2011: 8). Mann also notes that evidence suggests that employer surveys actually underestimate the actual need for FLS, due to complacency about the importance of English for international business (Mann 2011: 7).

Over the past decade, the share of vacancies in professional categories where FLS were lacking has steadily increased from 7% in 2004 to 10% in 2007 and 28% in 2009. The NESS findings also demonstrate a higher than expected demand for FLS in “elementary” occupations (i.e. unskilled, or with few educational requirements), being a factor in 30% of those vacancies. CBI findings corroborate this result, where 71% of employers indicated they were “not satisfied” with the FLS of high school graduates (Mann 2011: 9). As CBI findings demonstrate that 65% of employers are only seeking conversational ability of FLS, these skills should be easily attainable within the school system.

CONCLUSION FOR UK DEMAND

It is worth noting Tinsley’s conclusions on the use of foreign languages in the UK economy:

“The picture of language use that emerges from the survey is one of extreme diversity – skills in a wide range of languages are used across the full spectrum of economic life, for a wide range of functions, by employees at all levels in the system. Whilst this conveys a positive message in demonstrating the contribution that language skills are making across the economy as a whole, this very diversity presents a challenge for skills planning.”

Tinsley 2013, Appendix 1

- UK study recommends that language students combine their studies with a business or employment-oriented course.
- Students in professional or technical disciplines would benefit from including an applied language component to their studies.

Tinsley goes on to point out that *the wide range of languages required are almost random from a macro or national planning perspective, for so many different fields of employment*, and that “no clear picture emerges of the most desirable combinations of sectoral skills and languages.”

Her two general conclusions are that students specializing in languages should combine their studies with a broad business or employment-oriented course, and, that students focussing on professional, technical or other disciplines would benefit from including an applied language component to their studies.

Also, despite the calls for heightened oral language training, the heavy reliance on email and other forms of electronic communication demonstrates the need to maintain a strong emphasis on written language skills.

It is worth adding that, due to the present difficulty in combining language and vocational training at the postsecondary level when it is often seen as too late, returning to a greater emphasis on foreign languages in the school system, as recommended by Tinsley, the BCC and others, would be a major plus for the cognitive benefits it generates for the students. It also paves the way for if and when students choose to add a language component to their postsecondary program or first job experience.

6.2 JOB AD SURVEYS IN SPAIN, ITALY AND CANADA

SPAIN

FLS are a very important asset in finding employment in Spain, and a key requirement for companies offering employment. In a 2013 survey of 1947 workers, Adecco, a recruitment agency, found that 53.7% of workers required FLS in their last job interview. In a survey of online job ads listing foreign languages, Adecco found that the industrial sectors which required the most foreign languages (one or more) were the energy sector, manufacturing and health. In terms of functional areas, knowledge of a second language is required 9 times out of 10 for export, followed by management, and administration and finance. As is the case in other similar studies, English is the most requested foreign language, followed by French and German.

FLS requirements in Spain by industry sector and by function

By industry sector (Spain)	Share of total
Energy	44.5%
Manufacturing	39.8
Health	39.6
Telecommunications	37.7
Education	37.2
By functional field (Spain)	Share of total
Export	9 out of 10
Management	46.8
Administration and Finance	41.6

Adecco 2013

ITALY

In a smaller field study of 111 job ads in the Italian job market, Zappacosta (2013) searches for correlations between certain characteristics of companies, such as size, geographical location or language skills requirements. Unlike Adecco however, no additional survey of workers on actual language use is undertaken. Sixty percent of the job ads were placed by Italian firms, and 40% by foreign multinationals with an Italian affiliate. The study of ads posted on a major university website found that companies placing job ads are not particularly aware of their language needs. While more than one-third of job ads did not require any specific language skills, twenty-five Italian companies had English company names (such as Qubo Design Group or Between Spa) and 15 ads were by Italian companies seeking to staff jobs with English titles (e.g., copywriter, controller, or buyer).

While 22% of the foreign multinationals in the survey (9 out of 40) did not specify any language requirements, almost double this amount (42%) of Italian companies (29 out of 71) did not. It stands to reason that foreign multinationals based in a local market

would be more aware of their language needs, and to be more likely to specifically state their language requirements. Just like in Lorraine, foreign-owned companies in Italy were highly aware of their foreign language needs. Forty-seven percent of the multinationals, advertising to Italian university graduates, required English language skills, and another 18% required English along with another language (10% English and Italian, 5% French and/or English, 3% English or Italian). Another 5% required French and 3% asked for German plus another language.

Similarly a majority of Italian companies (50%) required English language skills, only 4% required German, and for 3% French was optional with English. The survey also found that both multinational firms and Italian firms were vague about their specific language requirements. For 67% of multinational firms and 32% of Italian companies, the “knowledge” of a language was sufficient, sometimes along with “excellent”, “optimal” or “good.” The study also notes that no employers made any reference to the language certification requirements sponsored by the Council of Europe, entitled the Common European Framework of Reference for Languages (CEFR), intended for the use of employers (Zappacosta 2013: 9).

CANADA

Demand for French-English language skills as expressed by employers is a key motivating factor for Canadian students and their parents to embark on official language learning. Canadian surveys confirm that employers consider bilingualism an asset for their employees.

In a survey of supervisors of bilingual employees carried out by Ipsos for Canadian Parents for French in 2008, 84% of employers considered knowledge of both English and French to be an asset, or gave preference to English-French bilingual candidates (Ipsos 2008). Furthermore, 81% considered their bilingual employees to be a valuable asset to their organizations.

Similarly, according to the Canadian Council on Learning, a 2003 web survey of 133 Canadian business leaders found that more than half (55%) believed that bilingual candidates were more employable than their unilingual counterparts (CCL 2008: 5). In a 1998 survey of 63 large companies, 84% of employers considered knowledge of English and French to be an asset or would give preference in hiring to English-French bilingual candidates. In a third survey, the CCL notes that bilingualism was identified as an asset for occupations in business and administration, tourism, sports and recreation, and sales and service.

Employment advertising provides further clues as to business demand for second language skills in Canada. In stark contrast to the European situation, in Canada, in a 2015 analysis of Canadian job postings, Workopolis found that English-French bilingualism is required in only 8.8% of job openings, a slight decrease since 2007 (Workopolis 2015). Demand for other languages accounts for even less, only about 1% of job openings.

With respect to English and French, the demand and supply of workers fluent in both official languages varies a great deal across the country, as well as by occupation and industry. Bilingual candidates therefore have a greater comparative advantage in certain parts of the country than others, depending on the local supply and demand.

Online job ads in Canada advertise very little for second language skills.

- 8.8% required English-French bilingualism
- 1% of job ads required other languages

Workopolis found that, on average, job advertisements requiring bilingual language skills received 20% fewer applications than comparable jobs not requiring a second language (Workopolis 2015: 2). In Ontario this gap widens to 39% fewer job applications. Workopolis analyzed the competitive advantage for bilingual candidates by occupation and by city.

The table below describes the top 20 Canadian cities where bilingual candidates have a competitive advantage.

Top 20 Canadian Cities where Bilingual Candidates have a Competitive Advantage

Rank	City	Province	Rank	City	Province
1	Toronto	Ontario	11	Ottawa	Ontario
2	Guelph	Ontario	12	Brantford	Ontario
3	Montreal	Quebec	13	Quebec City	Quebec
4	Kitchener	Ontario	14	Saint John	Newfoundland
5	Fredericton	New Brunswick	15	Winnipeg	Manitoba
6	Hamilton	Ontario	16	Vancouver	British Columbia
7	Regina	Saskatchewan	17	Oshawa	Ontario
8	Moncton	New Brunswick	18	Edmonton	Alberta
9	Halifax	Nova Scotia	19	Kingston	Ontario
10	London	Ontario	20	Cornwall	Ontario

Workopolis 2015

Interestingly, Ontario locations feature in 10 of the top twenty Canadian labour markets where bilingual workers have a competitive advantage, i.e. where the supply is low relative to demand. While Montreal has the highest demand across Canada, due to its healthy supply it falls to third place and Quebec City to 13th place. Following Ontario, the Atlantic and western regions each hold 4 labour markets where bilingual candidates hold a competitive advantage. It is also interesting that New Brunswick, which has a bilingual public service and has worked very hard in attracting call centre and back office services to the province to take advantage of its bilingual workforce, still has some scarcity in this area, with Fredericton and Moncton ranking 5th and 8th respectively in the top Canadian cities for competitive advantage.

OCCUPATIONS IN CANADA

Workopolis also provided a competitive analysis of occupations. Of the top ten occupations where bilingual applicants have a competitive advantage, three are in Finance, and two each in Information Technology, Sales and Marketing and Human Resources. General administration offers one occupation in the top ten. The table below illustrates the top 10 occupations in Canada where bilingual candidates have a competitive advantage.

Considering the general assumption that international/interprovincial trade represents the field requiring the most second languages, it is interesting that Finance plays a preponderant role, over and above Sales and Marketing, and that corporate services in IT and Human Resources account for 4 out of the top ten positions.

Speaking a second language doesn't seem to play a major role in business development in Canada, whether inter-provincially (English-French) or internationally (including other languages). Similar to Tinsley's analysis of FLS required for occupations in the UK, the fields requiring FLS are much broader in the Canadian workplace than just the fields of trade or sales and marketing. There are policy implications for this; second language skills are of interest to more policy-makers than simply those in export promotion.

Canada's top occupations requiring FLS:

- Finance
- IM/IT
- Human Resources
- Sales and Marketing
- Administration

Top 10 Occupations in Canada Where Bilingual Candidates have a Competitive Advantage

Rank	Occupation	Functional area
1	Billing administrator	Finance / Accounts
2	Collections Clerk	Finance / Accounts
3	Financial Administrator	Finance / Accounts
4	Technical Support / Customer Service	IM/IT
5	Human Resources Advisor	Human Resources
6	Marketing Coordinator	Sales and Marketing
7	Systems Administrator	IM/IT
8	Recruitment Consultant	Human Resources
9	Administrative Assistant	Administration
10	Sales Representative	Sales and Marketing

*Workopolis 2015***DEMAND FOR LANGUAGES IN CANADA OTHER THAN ENGLISH AND FRENCH**

As mentioned above, according to the Workopolis survey of online job ads, the demand for non-official languages in Canada is quite small, about 1% of online job postings. The previous study, undertaken by Workopolis in 2006, found that Spanish was the most commonly requested language after French, although, in the current sample, it has now fallen behind Chinese languages, both Cantonese and Mandarin, as the most commonly requested second language after the English/French combination (Workopolis 2015:4). Demand varies by occupation, industry sector and region. Spanish is the most requested non-official language in the technology and digital media sector, Italian in hospitality, and Chinese in healthcare, followed by Russian. Spanish and German are most requested in engineering and skilled trades, followed by the Chinese languages (Workopolis 2015:4).

As in other countries, these findings do not account for other sources of data, such as specialized language recruitment agencies or institutions, such as university modern language departments, and government departments, where the findings are likely to be different. For recruitment agencies in Canada, as elsewhere, advertising jobs online is only one of many tools employed to recruit suitable candidates for their clients, particularly for high skilled, sought after candidates, such as senior executives, lawyers etc. These mass online job search engines may help to contribute to common perceptions about the relative value of FLS, while ignoring the less visible job market.

7. CURRENT LANGUAGE PRACTICES IN THE WORKPLACE

This section highlights CIEP studies which document and compare language practices, and practical uses of FLS in a variety of workplace settings, countries, bordering regions, etc.

Studies of language practices aim to test whether management decisions on language, or selected management policies, have served to facilitate or hinder a business's operations or its returns. The studies in this section demonstrate that there are many variations of language practices in companies, depending on local language usage and the local languages of education. The issue of focus here is how these variations and practices affect the economic returns of the company.

Truchot briefly reviews the academic study of language practices in the workplace, and of language policies of states and international organizations. Truchot, like Grin, establishes that one must first understand language practices in the workplace before seeking to determine their economic benefits (Currivand and Truchot 2010).

Truchot establishes the following typology of language considerations within the business context, language decisions which would be common to all companies handling more than one business location with workforces speaking different languages:

- i) Considerations with an economic dimension (management decisions related to the choice of languages for internal communications whether oral, written or electronic, for external communications);
- ii) Considerations with a language dimension (i.e. selection of languages – whether the national language of the host country, or several local languages, or language of the company headquarters, or an intermediary or vehicular language, usually English); and
- iii) Political or legal-regulatory considerations, depending on the attention paid to internal workings of a company by the national or local government in questions.

All of the management decisions based on these language considerations may end up helping or interfering with carrying out the business mandate of the company, despite the fact that management intentions in this issue are always to facilitate the smooth running of the company, and thereby its bottom line, by removing difficulties caused by language barriers.

Similar to Tinsley, Truchot points out that there are implicit and explicit management decisions and policies with respect to language. While some companies might have a policy of the use of English as the intermediary, or language of communication, within the company, in practice other local languages often continue to play a role. In Switzerland, it has been demonstrated that in such companies, German, French, Swiss German and Italian continue to play a role, while in Belgium, a company in Wallonia may use French as its language of communication, but also use Flemish, and vice versa for a company in Flanders.

In examining the use of English as the principal language of communication, Truchot and Currivand (2010) document negative effects of poor language decisions that disregard the language practices and skills of the local workforce. These range from social or occupational health effects (language insecurity of the worker(s), discomfort, stress, and inequality and language discrimination) to economic effects, causing drops in productivity and efficiency, to which may be related any chain reactions along the line of production with other work units, or delays and associated costs. These problems also risk creating conflicts in the workplace, which can escalate to legal cases. (Truchot and Currivand 2010: 20).

Truchot outlines these negative effects further in an article reviewing all available case studies of large corporations in France (Truchot 2013). Similar to the findings of the EIU study, senior managers of French multinationals have a stereotypical vision of language use in their company: “In France, we use French, in an international context we use English, and everyone is recommended to use the language of the client” (Truchot 2013: 80). Truchot refers to a range of qualitative case studies to demonstrate that this stereotypical view of language use ignores a wide range of language use in practice.

EUROPEAN COMMISSION 2011 PIMLICO STUDY

The Pimlico study of 2011, commissioned by the European Commission, undertook an **inventory of best practices in language management strategies and policies in 50 European SMEs** (Hagen, Pimlico study, 2011). The final report highlights the profiles of 50 best practicing companies.

There are some key points worth highlighting which are common to most of the best practicing companies. Many of these top-performing companies identify the employment of native speakers - in as wide a variety of languages as number of markets served - to be essential to their success. One top company's language management strategy focussed on providing excellent customer care, in the language required, and building long-term relationships with buyers. Many expect their staff to speak at least one, if not two, foreign languages. Many of these top-performing companies rely on their plurilingual staff to undertake translation and interpretation in-house. High-performing companies maintain an inventory of the foreign language and cultural competencies of their staff to draw on when necessary, and company websites are available in multiple languages.

Best practices amongst European SMEs include:

- maintaining a staff inventory of foreign language and cultural competencies to draw on when necessary.
- making company websites available in multiple languages.

In order to provide excellent customer service, one company observed: "One cannot provide customer care in a neutral language such as English: one should strive to achieve competence in the language of the buyer. Only by adapting to the language and culture of the client can the company achieve brand recognition and the loyalty of its clients. The better the knowledge of the market and the language competence, the better the sales." (Hagen, Pimlico study, 2011).

Trade difficulties due to language issues can have major repercussions: "The company failed in Germany. The software was translated, but the company didn't employ native German speakers to sell the product. There was a lack of cultural strategy and vision. The German branch had to close down ... and it has only reopened two years later." (Everteam, French company, Pimlico study, 2011, cited in Hagen, 2011:5). Similarly: "The company started communicating with the Spanish market in English but could not fully communicate. Once it employed an account manager who spoke perfect Spanish the situation changed completely." (Fotona, Slovenian company, Pimlico study, 2011).

Like the Pimlico study, the LILAMA network, coordinated out of the Employment Services section of the government of Navarra Spain, was assigned by the European Commission the role of inventorying and assessing language policies and training programs, this time at the government level. The purpose was to identify best practices and practical guidelines in designing effective language training programmes and language policies which could be replicated in other jurisdictions (Gobierno de Navarra 2011). LILAMA established a number of criteria by which to assess and select these, focussing on quality (seven criteria for policy, six for training programs) and transferability (five criteria).

The empirical studies in this section of the CIEP bibliography, often case studies and focussed interviews, have revealed some interesting findings:

- English as lingua franca has more limited application in a linguistically diverse world than is commonly perceived.
- English as lingua franca can be effectively used in certain, limited, sectors, such as high finance.
- English as lingua franca is essentially defined as a limited telegraphic form of language with very limited vocabulary. (see Truchot Currivand definition of "Globish")
- This limited form of English might work acceptably well at lower or junior levels of a company.

- However at higher levels, as the work level becomes more sophisticated, nuanced and tailored to specific situations; it relies on a much expanded native version, with increased vocabulary, of either English or another language selected by company leaders.

DENMARK

In a study examining the perceptions of language needs in Danish companies, Millar et al find an interesting moral sense of obligation towards the use of English for all international business communications. (Millar et al, “The perceptions of language needs in Danish companies: Representations and repercussions” in Luedi 2012). In a mixed quantitative-qualitative case study of workers in companies based in Denmark, workers in 19 companies filled out a questionnaire, and workers in another 12 companies were interviewed, on average 3 per company. Millar et al found that the workers had an interest in other languages, for work purposes, however, they readily accepted English as the international lingua franca of business. There was a common view amongst Danes surveyed that “others” in other countries (clients, suppliers etc.) don’t know English well (or haven’t accepted English as lingua franca as readily as the Danes), which causes problems for trade.

Some Danes are feeling less comfortable speaking “Scandinavian” with people from other Nordic countries such as Norway and Sweden (Millar et al: 89); possibly the younger generations are losing the ability to communicate between Scandinavian languages and prefer to use English. Other interviewees on the other hand spoke of their personal language adaptations (hybridisation strategies) which they used to communicate with interlocutors from other Scandinavian countries – “an inter-Nordic language”, “speaking Scandinavian”. “It is clear that many of the interviewees see absolutely no need to learn either Swedish or Norwegian. If mutual intelligibility fails, the solution is simple – English.” The study found much pragmatism in the Danish workplace on the part of both managers and workers. It would be desirable for this to be encouraged, to muddle through, reducing the emphasis on native fluency and the desire for linguistic perfection of the Danish workers (Millar 2012: 93).

FRANCE

Factors influencing the use of French in France in large corporations or subsidiaries include the importance and role of the French divisions (e.g., headquarters, centres of research), the company’s governance model and ties with foreign companies (mergers, alliances) (Truchot 2013).

The results depend on the efforts made to enable the use of French (translation of work documents, development of French software and intranet systems, adaptation into French of informatics tools, French-language training for foreign employees working in France, etc. On the other hand, foreign subsidiaries in France tend to use the language of company headquarters, while commercial distribution subsidiaries focus on using the local language for marketing purposes, for example, a German subsidiary in Alsace which uses French. It is, however, starting to switch from German to English for communication between affiliates and/or HQ.

Truchot examines the language policies of American multinationals because of the consequences on French subsidiaries based in France. The use of English in American multinationals serves three purposes: firstly it is the hierarchical language because it is the language of company HQ, secondly it is the intermediary language with all international subsidiaries, and finally it is the language of reference for terminology which is derived from American divisions. In one example, an American multinational established in Europe since the 1960s, allowed a decentralized model for its French subsidiary, however this is no longer the case in the new century. Pressure is being applied to all affiliates to increase their internal use of English, including in communications with partners and clients. English is being imposed as much for ideological reasons, and an assessment is not considered of the benefits of using national or local languages, i.e., the language of the majority in each affiliate, the language which staff know best and in which they are most effective.

In a number of industry sectors, it has been assumed that English has become its principal language. It is not only considered the international language of finance (largely based in London, UK), but also in informatics, aerospace, electronics, pharmaceuticals and upscale hotels (Truchot 2013: 83). In an example in the aeronautics industry, the Air France union of pilots asked that the main aircraft manuals be translated into French, however this was refused on the basis that English was the language of aeronautics. The union made the point that this would not prevent individual pilots from undertaking informal translations of the manuals, whose inaccuracies could lead to serious safety problems. The union turned to the courts, which first agreed, however it lost on appeal, despite the fact that aeronautics has been around for a century in a wide variety of languages (Truchot 2013: 84).

In Truchot's review of French case studies, in virtually all cases, mergers, acquisitions or alliances between companies of different nationalities has led to the use of English as the intermediary language, without consideration of alternatives.

MOROCCO

In Morocco, French (le français langue étrangère - FLE) wins hands down as the most important foreign language for business after the national language Arabic. While the use of French began in colonial times, Majdi states that «sa place aujourd'hui fait d'elle une langue de modernité, de progrès et d'ouverture sur l'occident. » (Majdi 2011).

From a mixed survey of focussed interviews and questionnaires with 50 leaders and 145 mid-to senior-level employees of SMEs from three major business centres, Marrakech, Casablanca and Béni Mellal, in 2004-2005 Majdi found that French is not only overwhelmingly the language of business, it occupies a place of privilege, or status, vis-à-vis other languages of the region (Arabic and Berber for example) (Majdi 2011: 136, 142-144).

In Morocco, French is not only overwhelmingly the language of business, it occupies a place of privilege vis-à-vis other languages, such as Arabic and Berber.

French was used, on average, for 80% of all written communication, 50% of oral communication and 100% of electronic communication.

Majdi focussed on SMEs as they constitute the principal motor of the Moroccan economy. SMEs were selected from thirty-nine sectors of activity, from primary (mining and agriculture), secondary (construction, agri-food, pharmaceuticals, engineering, and arts and crafts) to services (medical, hospitality and travel, retail and wholesale, media and telecommunications (Majdi 2011: 334). French was used, on average, for 80% of all written communication, 50% of oral communication and 100% of electronic communication (email, websites etc.) (Majdi: 160). For some employees, this was despite the difficulties caused by their

limited knowledge of French. Business oral communication in French is still important however Arabic is also used. Arabic is also the language used on the street, with friends, family, and the language for written and spoken media.

A majority of respondents (64%) considered the use of FLE an important success factor to enable their company to operate effectively, while a minority (16%) felt that it contributed to a sense of alienation within the company (Majdi: 225-226). This contrast nevertheless shows the appreciation that respondents had of the economic benefit of the use of French in their company. Furthermore, in the 50 focused interviews, all respondents felt that the use of French did not constitute a danger for their traditional way of life. Its economic benefit provided the legitimacy for the use of French in Morocco, without creating a rivalry with the national language. For 70% of the SME business leaders, the use of French was the means by which to keep their company abreast of scientific and technological developments, while for 65% it provided the opening to the outside world – external markets, especially francophone and for 34% it was a source of culture, providing a means to cultivate one's imagination (Majdi: 226).

Language Rankings (1 to 4) by Moroccan Employees According to their Usefulness

Language	Rank	Average	Standard deviation
Arabic (national language)	1	1.85	1.50
French	2	1.94	1.50
English	3	2.86	1.50
Spanish	4	3.85	1.50

Majdi 2011: 262, Table 10

According to these leaders and employees of Moroccan SMEs, French as a foreign language (FLE) continues to play a preponderant and respected role in business and general use in Morocco, compared to other foreign languages, including English and Spanish, despite Spain being the closest neighbouring European country to Morocco. This is likely to be similar to many developing and emerging countries with close ties to the Francophonie.

IMPORTANCE OF FRENCH AS A FOREIGN LANGUAGE TO ENTER THE MOROCCAN WORKFORCE

In a 2013 book edited by Blanchet and Messaoudi, researchers publish their case study findings on the importance of foreign language skills (in this case French, or FLE) for entering the Moroccan labour market. Since the educational reforms starting in the 1980s establishing classic Arabic as the dominant language in the public school system, the Moroccan educational system does not effectively prepare students for either postsecondary education or the labour market (Sibenali: 96 in Blanchet 2013).

Researchers' studies confirm that French is useful, and in fact essential, to young workers entering the labour force in a variety of economic sectors. At the recruitment stage, French was used entirely for formal interviews in all sectors surveyed. In a case study of the automotive sector, Haidar finds that FLE is essential for recruitment (Haidar in Blanchet 2013: 217). French is used by commercial agents for oral communications in a variety of situations, and is essential for the written communications of engineers and specialized technicians. French is also the specialized language of the automotive and manufacturing industries, and commonly used in automotive dealerships, factories and other industrial sites (Haidar, in Blanchet, 203-218).

7.1 MYTH AND REALITY OF A LINGUA FRANCA AND THE ECONOMICS OF LANGUAGES

In the past, it was generally believed that English would become the lingua franca of globalization, or « Global English » one common universal language. However, this perspective is losing traction. For example, Nikuze (2013) examined the role played by various languages in the Great Lakes and Eastern African Community regions of Africa, where he found that English was insufficient for trade and commerce, particularly in the francophone countries of Rwanda and Burundi who have recently joined with the members of the East African Community, with strong British colonial ties, to begin the creation of an ambitious economic community.

As noted with the BCC survey, the export-oriented Chambers of Commerce are very in tune with the language implications of new markets. At a business roundtable, Carmen Gisondi of the Turin Italy Chamber of Commerce noted:

“The experience of recent years leads us to state that English is no longer enough to cover the total needs of “linguistic contacts” if you want to be really present in new markets such as Brazil, China, India. In Russia we have noticed unfamiliarity with English, so if you want to penetrate certain markets you have to have a linguistic intermediary on site who speaks both Italian and English, but who then interacts in the local language.

This is also true for China, a market that is gearing up, but where most of the contacts and negotiations take place in the local language. So in the near future, the difference in competition will be linked to the ability to manage and learn languages like Russian and Chinese in addition to English.” (Translation. Gisondi, in Mattioda 2013: 6).

Gisondi notes, however, that for major international special projects (as supplier or partner) in a wide variety of sectors (“from aerospace to ITC”), the ability to communicate in English is a qualifying pre-condition to submitting interest for contracts. For participants at the business roundtable, English was taken for granted as the required second language for business. However, as Grin et al discovered with LEAP in Switzerland, supply of English was better than other required languages for business, as was French in the German-speaking part of Switzerland and German in the French-speaking part of Switzerland. The integrated nature of a domestic economy, together with having France and Germany, two major industrial economies, as neighbours helps to explain this level of demand.

As Truchot explains: « Une gestion explicite des questions de langues doit pouvoir reposer sur des principes, objectifs ou pratiques auxquels l’entreprise se réfère à chaque fois qu’elle est confrontée à ces questions. Pour ce faire, ces questions doivent être intégrées dans le fonctionnement même de l’entreprise ainsi que dans sa culture. » (Truchot 2013: 88). This viewpoint is also raised in the dominant Anglophone countries, where the English-only model is increasingly called into question.

Currivand and Truchot discuss the term “Globish,” explaining that it isn’t really a global language at all; it is a minimalist, telegraphic version of English used by non-English speakers. As an employer moves up in the hierarchy, and the complexity of the work, more complex language is required. In the study of a multinational financial services corporation based in London UK, at the base, 1,500 words of English language and financial terminology was sufficient, while at the top management level, 50,000 words of English were commonly used, capable of capturing all the nuance and subtle concepts of discussions and in-depth analyses at that level (Currivand Truchot 2010: 23).

Nikuze cites a 1997 study for the British Council, where David Graddol concluded that, while English would continue to play an important role, due to the size and geographic scope of the native-speaking population and other factors, its position is being threatened in certain geographic regions and fields due to a range of political, demographic and economic trends under way. In the economic realm, in order to communicate more effectively between buyers and sellers in a globalized marketplace, trends are moving towards bilingualism, even tri- and quadrilingualism, and that the languages of the emerging economies would come to remodel the linguistic landscape of global commerce (Nikuze 2013: 89).

7.2 THE NEGATIVE EFFECTS OF ENGLISH AS A COMPANY'S LINGUA FRANCA

Studies in this section serve to demonstrate that companies and organisations established in multiple locations that ignore questions of language or uniformly apply a simple language policy, such as English as the global corporate language of communication, ignore these issues at the risk of their company's morale, productivity and bottom line.

Curriand makes some useful observations of the risks of creating a divide between the multilingual working elite, comfortable working in many languages and cultures, and those who are locally focussed. The costs to a company of an "all English" language policy, such as the loss of productivity of workers compared to working in their own language, and the costs of English language training vs the costs of translation into the local language, need all to be rationally assessed prior to establishing a language policy for the company. Truchot describes the illustrative example of a Swiss multinational pharmaceutical company which imposed a standardisation of English for all internal and external communications, all IM-IT tools and the company intranet. Everyone at all levels must use English, including all subsidiaries, including the French affiliate (Truchot 2013: 82). Several cases have been successfully brought to the French courts by union representatives against their company's management focusing on the requirement to use IM-IT tools and software in a language in which they were not fluent.

7.2.1 "ALL ENGLISH" CURTAILS INTERNAL COMMUNICATIONS

English is often established as a company language without sufficient management review and oversight, and even less discussion or negotiation with workers, or review of potential consequences.

The French case studies raised by Truchot all point to the insistence by senior managers to impose English on internal company communications, including meetings and important speeches, creating a marginalization or exclusion of French-speaking employees, and essentially revoking the right to speak at important company meetings and events. These unilingual workers are often, but not always, either the oldest, those with most seniority in the company or the least qualified.

Not only is the blanket imposition of a foreign language on a workplace a source of stress and frustration for the workers, it also lowers the potential productivity of the company. When a meeting takes place in a foreign language solely for the benefit of one participant, other, highly competent participants may not make any meaningful contribution, which is a loss for the company.

- Imposing a foreign language on a workplace causes worker stress and frustration, and also lowers potential company productivity.
- When a meeting takes place in one language solely for the benefit of a portion of the participants, other highly competent participants, comfortable in another language, may not make a meaningful contribution.

Other companies on the other hand make conscious efforts to take what Lavric calls an **adaptive approach** (Lavric 2009). A medium-sized French agricultural machinery company in the 1970s took pains to develop and implement a language adaptation strategy along with its strategy for international expansion (Truchot 2013: 87-88). The company worked to understand each local market and in its own language. Export divisions were created based on the ability of staff to master the local languages, relying first on FLS internal to the company and secondly on external recruitment. Today the company has 4200 employees on staff, 9 factories and has a distribution network across more than 80 countries. Information materials are provided in 15 languages, and each subsidiary has its own website in the local language. The company believes it receives a significant return on its investment in translation and language training.

7.2.2 DECLINING SCIENTIFIC COMMUNICATION AND MULTILINGUALISM

In the field of social sciences, the situation is equally stark. Nikuze (2013) cites a 2009 study for the British Academy by Levitt et al which points to the damaging effects of the limited FLS of British researchers which is limiting their ability to participate in international studies, particularly in the social sciences and humanities, compromising their career opportunities and their international competitiveness in their field of study (Nikuze, 2013:89).

In the pure sciences, the past few years have seen the number of articles and citation rates for Asian researchers in particular rising exponentially. In the United States, the awareness of the limits of unilingualism has affected all fields of academic inquiry (of science and technology). In 2007, the Office of Scientific and Technical Information of the Department of Energy launched an international multi-lingual platform (worldwidescience.org) to enable the search in 10 major languages of scientific information from 69 institutions in 66 countries (Nikuze 2013, p.90).

7.2.3 THE COMMODIFICATION OF LANGUAGE SKILLS

In her review of the telecommunications sector, Boutet takes another approach in examining the role of language workers in the economy, using as examples the ubiquitous telephone operators in the early part of the twentieth century, followed by call centre workers 50 years later (Boutet, in Duchene and Heller, 2012). The evolving usage of language can be studied in response to globalizing forces. Boutet makes reference to Grin et al (2010) when she discusses this process:

“Languages and language activity are part of the process of economic globalization. Because of globalization, language is mired in contradictions between a fundamentally identity oriented and geographically centered historical conception, inherited in large part from the ideology of the Age of Enlightenment and the French Revolution (“one language, one country, one nation’), on the one hand, and, on the other, their present-day economic status, as commodities whose value can be assessed and paid for, thereby constituting a profit base for commercial companies...

In other words, languages both continue to be considered identity attributes, and thus one of the bases for nationalist claims all over the world, while simultaneously being caught up in processes of commodification in which identity values no longer hold sway, and emerging as resources and a source of profit for businesses.” (Boutet: 207).

Boutet illustrates this with the example of countries of North Africa where the clash of identity and aspiration related to the protection and promotion of their minority Berber languages in contrast to the Arabic languages, vs the economic precedence given to French due to corporate outsourcing by French corporations to the region and the ongoing commercial trade with France (Boutet: 207).

Boutet’s conclusions are that call centre workers, like telephone operators before them, perform simplified and limited, highly repetitive and highly controlled language dialogue. (Boutet: 223) They are essentially factory workers of a new kind, working in a “service factory.”

People with SLS, as they consider career opportunities, learn this lesson quickly. Using one’s SLS as hard, technical skills for the purposes of a highly specialized job (as with translators and interpreters) is exhausting and demanding work which often requires high levels of proficiency and accuracy, and which is not necessarily sufficiently rewarded for the toll on the individual. A similar observation was made in the Brussels study (TIBEM: 101). Many speakers with SLS “end up” or select careers or jobs which exploit or reward the soft skills aspects of their proficiency in second languages, or alternatively, use the language in the job as a secondary skill rather than primary. For example, a bilingual candidate is hired as an engineer and, due to his or her SLS, is given the opportunity to work on cross-cultural work teams, or participate in international trade shows or conferences.

7.3 OVERCOMING THE SHORTCOMINGS & COSTS OF ONE LINGUA FRANCA

One approach to examining the possible costs of imposing a foreign lingua franca is to examine samples of internal email communications. By analyzing the email trail of three companies, one of European nationality with a production site in China, and two companies in a joint venture, one French and one Chinese, Tréguer-Felten (in Mattioda 2013) finds that English as lingua franca causes misunderstandings whether used at its most basic mechanistic level, or when used at a more advanced level. She demonstrates that the cultural and linguistic practices of the two communicating parties (in this case French and Chinese) are masked by the seemingly neutral use of a third language.

Tréguer-Felten argues it would be far better to take several additional steps to compensate for the obvious shortcomings of a simple lingua franca approach, such as:

- hiring of bilingual or trilingual intermediaries to be readily available when situations of misunderstanding may arise;
- developing a terminological glossary in all the languages of the company's worksites (a best practice used by AXA Assistance);
- specifically itemizing the language requirements for each work description using the European framework of language criteria;
- requiring a minimum score on the TOEIC (Test of English for International Communication) at recruitment;
- in multinational work teams, selecting employees who, all being equal, also had language skills in the other main language of the company (e.g., Renault-Nissan requiring, in addition to English, skills in Japanese or French, depending on the employee's mother tongue). (Tréguer-Felten 2013: 56).

Successful and effective company policies and practices used to cope with language and cultural differences include:

- Hiring bilingual or trilingual intermediaries
- Developing and using multilingual technical glossaries
- Identifying language requirements for each position.

Tréguer-Felten gives examples of other companies, such as Electrolux of Sweden, which uses English as lingua franca throughout the company, and resorts to a form of "bad English" so as to avoid creating tension between those with a more sophisticated understanding of English and the average worker with a basic level.

Tout porte à croire que, du point de vue professionnel, la langue anglaise sera, à l'avenir, de plus en plus nécessaire mais de moins en moins suffisante.

Amin, Maalouf, Le Monde, 28/02/08, in Tréguer-Felten 2013: 57

7.3.1 INTEGRATING LANGUAGE POLICY IN A COMPANY'S DECISION-MAKING STRUCTURE

While international assistance is commonly provided in English, a company specializing in this field, called AXA Assistance, has chosen a deliberate management approach to handle questions of language.

"On peut citer la formation linguistique qui est diversifiée et adaptée, la valorisation des compétences linguistiques en interne et parmi les personnes recrutées, la mise en place d'une méthode calibre d'évaluation des niveaux de compétence linguistique fondée

sur le Cadre européen commun de référence pour les langues (CECRL), le large recours à la traduction, l'adaptation linguistique (i.e. localisation) des équipements informatiques. »

The overriding achievement has been to integrate the management of questions of language policy into the organizational decision-making structure of the company. A terminology commission was established to handle all questions relating to language, with representatives from management and workers. A union representative observed that “we went from an implicit to an explicit approach. The explicit management (of language issues) is now integrated in the culture of the company.” (Truchot 2013: 88).

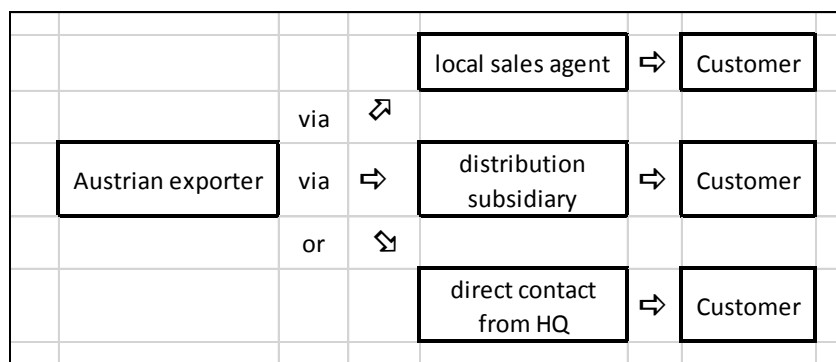
LAVRIC REVIEW OF 30 EUROPEAN COMPANY CASE STUDIES

In her paper, *Stratégies et identités plurilingues des entreprises et des individus dans les entreprises*, Lavric builds on the previous statistical-quantitative research and goes further by using qualitative research techniques in order to identify the contexts and factors in which companies are likely to choose one type of language policy for internal and external communication vs. another (Lavric 2009). She presents findings based on a series of 30 qualitative case studies in companies which are active internationally and are established across Europe in a range of sectors. Lavric explores the research to examine the empirical basis behind two common viewpoints, firstly that, as everyone in the business world speaks English, language no longer constitutes a real problem, known as the English-only thesis, or the Standardization thesis (Lavric 2009: 3).

The second point of view is that, in business, one must always speak the language of the client, the Adaptation thesis, which is in direct opposite to the first. Businesses serving international markets are likely to use a spectrum of communications strategies which fall somewhere between these two linguistic approaches.

Lavric’s first principal finding was that many, if not most, companies relied on their distribution channels to handle questions of local languages, thereby avoiding the need to adjust the company’s language policies and practices for each new market or source of production (Lavric 2009: 7). A company may use one or more of three approaches to distribution, depending on the size of the company and the markets – it may choose to serve a buyer overseas directly from company headquarters, thereby taking on all the language requirements itself; it may recruit a sales agent in the local market, who will act as the language intermediary between headquarters and buyers; or it may establish a local subsidiary to take on that role, as explained below:

Three approaches typically used for sales distribution



Lavric 2009: 8

Secondly, the vast majority of the firms studied undertook some form of Adaptation, i.e., communicating externally in the language of the client, while having a variety of language options for internal communications – German/English/French, English/French, French only, etc.

Only two of the thirty companies studied successfully implemented an “English only” language policy, however in both cases an indirect distribution structure was used for overseas sales (Lavric 2009: 8). In practice then, the adaptation model was also in use, however was implemented by either a local subsidiary or a local agent. The large company examined in ‘Case Study 19’ established a local subsidiary in every overseas market, with which all internal communications takes place in English, while the local subsidiaries are responsible for all marketing, communications and service to clients in the local language. The small company in ‘Case Study 7’ has a similar practice however with designated local distribution agents in each market.

7.4 CONCLUSIONS OF THE CURRENT LANGUAGE PRACTICES SECTION

There are a number of potential implications for Canada from the findings of this section. Firstly, with respect to local workplaces, the findings note that people are far more productive in their native language or in their language of education, compared to a language they learn on the job. Organizations should be careful with their choice of language policies, taking heed of local language use and practices to ensure maximum occupational health, effectiveness and productivity.

These considerations would also be needed if employing workers whose native language, or language of education, is not one of Canada’s official languages, but rather, for example aboriginal languages or immigrant languages, such as with agricultural seasonal workers or other temporary foreign workers.

These situations would apply in Canadian workplaces such as the following:

- Federal workplaces (Part V of the OLA)
- In parts of the country where organizations might practice a language of communication which is different from the local language
- If employing workers whose native language, or language of education, is not one of Canada’s official languages, e.g., aboriginal languages, immigrant languages, such as on mining sites and refineries, forestry camps, fish processing plants, farms
- Small owner-operated businesses which often employ family members or members of similar communities, such as ethnic restaurants, grocers, bakeries etc.

- Research shows that people are far more productive in their native language or in their language of education, compared to a language they learn on the job.
- Organizations should be careful with their choice of language policies, taking heed of local language use and practices to ensure maximum occupational health and productivity.

For foreign-owned multinational corporations in Canada, employing a certain threshold of workers, may also have to adhere to legal-regulatory language requirements, such as in Quebec. Similarly, large Canadian corporations, whether in Canada or overseas, should be careful with their choice of language policies and practices, and to the local regulatory requirements, usage and language of education of the local workforce.

8. LANGUAGE USE AND IDENTITY

In this section, Currivand examines the issue of language and identity, an issue of interest to the Canadian context. He outlines the corporate language identity for a major French multinational corporation of symbolic importance to the country. In Canada, a longitudinal study of young adults of immigrant backgrounds in Montreal argues that French is alive and well in younger generations for both public life and in the world of work.

CANADA

In a recent longitudinal study of a cohort of young plurilingual immigrant Montrealers, Lamarre et al found that they did not associate their language abilities with their sense of identity. They had a strong sense of belonging to Montreal and to Québec (“Je suis d’ici” and “J’habite ici, donc je suis québécois”), while recognizing that their sense of identity did not correspond to the common ethno-linguistic concept of “Québécois” of the majority of the population (“Je ne passe par pour Québécois”) (Lamarre et al, 2015: 2).

- Young immigrants in Montreal today consider French the primary language of the city, both in public life and as the language of business.
- The facility that young immigrant Montrealers have with many languages is likely common with many other young immigrants across Canada.

The study also investigated their language use, as do other studies cited in this paper. Lamarre et al found that they had a wide variety of language practices, depending on their interlocutors (Lamarre et al, 2015: 1). They adapted their language use with ease, limiting their multilingual form of communications with those who shared the same language abilities as themselves, primarily family and friends. The use of French, which was major while in high school, fell somewhat for those who chose an English language postsecondary institution. French was also the first language spoken in public with a stranger.

There are three take-aways from this study:

1. Young immigrants in Montreal today consider French the primary language of the city, both in public life and as the language of business;
2. Young plurilingual Montrealers have labour mobility; and
3. Young Montrealers’ facility in many languages is likely common with many other young immigrants in Canada.

Lamarre et al propose that additional research should be done on the use of multiple languages in the Canadian context, adding additional variables – outside of the home and the workplace, other locations and environments “in all their complexity”, including mixed language use, in order to obtain a more accurate and actual portrait of the dynamics of language and the vitality of the French language (Lamarre et al, 2015: 2). The Lamarre et al study demonstrates that code switching, from one language to another and back again, happens between plurilinguals in Canada all the time, just like in Europe.

The superior multiple language abilities of these young Montrealers give them enhanced economic opportunities to follow the best job offer that they receive (Lamarre et al, 2015: 1). Their sense of disconnection with the majority population combines with their language skills and a willingness to try out whatever fate offers them.

8.1 IDENTITY ISSUES IN CORPORATIONS

Curriand (2010) raises an issue of interest to the Canadian context. He outlines the corporate language identity for Renault as conceptualized by two leaders of the company. Louis Schweitzer, former chairman, held that Renault had a linguistic and cultural identity as a French company which needed to be “preserved”. In contrast, Carlos Ghosn, current president and CEO of Renault and Nissan, is a Brazilian whose postsecondary studies in engineering were in France and worked for French multinationals (Michelin and Renault), who saw language merely as a tool, and saw the need to build a common corporate identity between workers of different perspectives and origins who work together in teams and gradually set aside their particular differences. This can be an interesting analogy for Canada, which is a multicultural society based on two official languages. French-English bilingualism act as a foundation, allowing a springboard to other languages and cultures.

Since language is a tool, Ghosn chooses English as the intermediary language of the company. It might be said that Ghosn sees Schweitzer as having an essentially twentieth-century conception of Renault's linguistic identity while he would have a twenty-first century, multicultural or multinational perspective (Currivand Truchot 2010: 20). As we reach further into this new century, and several years after the publication of their memoirs as CEO of Renault, the use of the Internet and the emergence of other large world economies continue to evolve, both of which may have major consequences for language use in and between companies.

8.2 LANGUAGE AS A MEANS OF COMMUNICATIONS VS. LANGUAGE AS PART OF A CULTURAL IDENTITY

Like Boutet, Tréguer-Felten and Truchot, Grenier and Nadeau make a useful distinction between the uses of language as a means of communication, vs. language as part of a cultural identity. For the first, the larger the number of individuals who use a language, the more useful that language is as a tool of communication. Grenier and Nadeau call this "the network externality of language" (Grenier Nadeau 2013: 4).

One can take this concept further. Just as in India, there is room for a hierarchy of languages. In the case of India, English and Hindi are used at the national level, regional languages acting as major languages at the state level or regional level, and the thousands of local languages and dialects serving smaller parts of the population. Similarly in other countries, while English is sometimes useful as a lingua franca, other major languages also serve to group populations for collective communication, such as French in the Francophonie and more regionally in parts of Africa, and German in Central and Eastern Europe, with the vernacular languages acting as the local, domestic languages. In addition, research on language practices demonstrates that French and other major Latin languages, such as Spanish and Italian, are often convenient vehicular languages to each other, and to Portuguese or Romanian. French has a greater network externality than is currently assumed.

Language, however, transmits not only meaning in a strict, terminological sense, but also commonly held moral values, judgements of other social or political references. In her qualitative research of email communications between companies of different language backgrounds, Tréguer-Felten illustrates very well what can happen when companies of different nationalities use a common language (English) as a simple means of communication while getting caught in a clash of cultural miscomprehension (Tréguer-Felten 2013).

Nikuze's conclusion is of interest here: « À l'heure de la mondialisation, marquée par l'émergence des BRICS, il n'est plus possible de faire l'impasse sur la question des langues en matière de communication. De ce point de vue, elle ne concerne pas que les spécialistes du domaine ou la communauté des enseignants et des chercheurs, toutes disciplines confondues : elle est l'affaire de tous. ».

8.3 LANGUAGE NEEDS AND STRENGTHS OF EUROPEAN IMMIGRANTS

The European Ministers of Education, at a Council of Europe meeting in 2009, demonstrated that they understood this about young immigrants in Europe (European Commission, 2011: 18). It was estimated that at least 175 nationalities are now represented within the borders of the EU. While the Ministers placed the primary focus on ensuring a sound basis of the language of the host country, they also stressed that school children and youth should be encouraged to maintain their knowledge of their heritage language because, as Agirdag also found in the US, of the benefits it could provide them in their future careers. EU Member States were encouraged to fund specialized training for teachers and other school staff on managing linguistic and cultural diversity and on cross-cultural communication.

The EU expert working group, however, well understood that employment issues for immigrants in Europe extended well beyond the classroom and into the workforce proper. A best practice was cited in a public-private partnership between London Heathrow Airport, the local London West Learning and Skills Council, and the national Centre for Languages (CILT) (European Commission,

2011: 18). They commissioned a language audit of the Heathrow Airport workforce, and found 27 different first languages, and a total of 45 languages spoken, amongst a sample of 150 employees. The report included recommendations on how to use these FLS to improve customer service at the airport, as well as on training needs, including ESL, and other challenges.

There are interesting implications here for Canada. Language audits, as a best practice, could be suggested for Canadian airports, bus terminals, federally regulated ports, and also for local and provincial tourism commissions, whose staff also address foreign travellers on a regular basis.

9. EUROPEAN FOREIGN LANGUAGE PUBLIC POLICY ISSUES AND BEST PRACTICES

European governments, as well as a variety of European private policy institutes and associations, have been commissioning and reviewing the research on the question of FLS for many years, as reflected in the works compiled in the CIEP bibliography reviewed here. In response, organisations of the European Union, with the active participation of representatives from their member countries, have published many policy declarations and initiatives on the role of foreign language skills (FLS) or foreign language learning (FLL) in relation to employability and enterprise. A number of these are in the CIEP bibliography, and are thus being examined in this literature review as well (e.g., ELAN 2006, DGEI 2010 and Pimlico 2011 already cited).

Consequently, in this section, the analysis shifts away from a focus on economic benefits to a comparative public policy perspective, with a focus on highlighting potentially useful policy frameworks and prescriptions of potential interest for the Canadian context.

European policy discussions in a wide range of policy areas have galvanized around the benefits of FLS and how they contribute to resolving a variety of pressing policy issues. These policy declarations and studies cite the importance of FLS, for example, as basic skills to be acquired while at school, their role in labour mobility, in contributing to social cohesion, and in maintaining the EU's competitiveness.

European policy declarations and studies cite the importance of FLS

- as basic skills to be acquired while at school
- their role in labour mobility, in contributing to social cohesion, and in maintaining the EU's competitiveness.

The Report of the Council of the EU of November 29, 2011, the *Council Conclusions on Language Competences to Enhance Mobility*, provides a useful summary of past policy declarations related to languages and employability, including:

- The March 2002 Barcelona declaration which advocated learning at least two foreign languages at school from a very early age;
- The May 2006 reaffirmation that FLS were a prerequisite for a mobile workforce and contributed to the competitiveness of the EU economy;
- The December 2006 recommendation of the European Parliament and Council which included FLS amongst the key skills for lifelong learning, referring to its contributions to employability in a knowledge society;
- The 2008 Council Resolution of November 2008 on a European strategy for multilingualism for competitiveness and employability, as well as social and cultural objectives;
- Several EU policy initiatives under the banner of ET 2020 tying foreign languages acquisition with vocational education, to creating a more dynamic labour market;
- One policy declaration not listed in the 2011 declaration relates to the Council conclusions of 26 November 2009 "on the education of children with a migrant background," where it was declared that children of immigrants should not only be assisted in learning the language of their host country, but should also be encouraged to maintain their knowledge of their heritage language. (EU Council, 2011: 1-2)

Since 2002, EU members have been working to implement the “1+2” policy in elementary schools.

- Learn 1 national language and
- 2 additional languages (national, regional, immigrant)

The March 2002 Barcelona Declaration to teach at least two foreign languages in school from a very early age, often reduced to “1+2”, was a key recommendation, which inspired much discussion and action on the part of member states. It refers to the call to teach one national language plus two others, either foreign, regional, minority or immigrant languages, starting from primary school, or even preschool. The British and Scottish National Centres for Languages, for example, undertook public awareness initiatives to promote FLL in schools and with young people (Centre for Information on Language Teaching and Research (CILT) 2006), and the Scotland Ministry of Education is working with schools to incorporate the “1+2 Approach” into the curriculum, and to strengthen the ability of schools and the teacher workforce to implement the program.

Another early policy initiative which is being promulgated to various degrees by member states is the Common European Framework of Reference for Languages (CEFR), established by the Council of Europe in the early 1990s to develop a common resource and approach for language policies and practices across all policy areas (education, post-secondary level, business, trades, etc.) (See for example Istituto per la Ricerca Sociale, Lilama, The CEFR and the Labour Market: options for transferability, undated).

As part of this policy-making process, a number of public or private sector select panels and committees were struck to provide policy recommendations and guidance to EU Commissioners and to institutions of member countries. The Business Forum for Multilingualism (or Davignon Forum), for example, was set up to explore how language skills can have an impact on trade and jobs in the European Union (Davignon et al, 2008). Their final report was accepted by the European Council and Commission in November 2008 (referred to in the 2011 Council summary above).

The Business Forum for Multilingualism noted that Europe is running the risk of losing its competitive edge, particularly against emerging economies of Asia and Latin America which are rapidly acquiring FLS.

In its final report, the Davignon Forum noted that Europe is running the risk of losing its competitive edge, particularly against emerging economies of Asia and Latin America which are rapidly acquiring FLS, along with other competitive skills.

Data from the US supports the observations in the Davignon Forum’s final report. The US Institute of International Education (IIE) noted in 2013-2014 that 50% of all international students in the US were from China, India and South Korea (IIE 2014: 8), while the largest growth originated from Kuwait (43%), Saudi Arabia (21%), Brazil (22%), Iran (17%), China (17%) and Venezuela (14%) (IIE 2014: 12). The top choices in fields of study selected by international students by far are in STEM subjects (sciences, technology, engineering and mathematics), for a total of 42%, followed by Business and Management (21%) (IIE 2014: 16). For the students from all these top originating countries, their studies would have been in English, i.e. it necessitated working at achieving their studies using English as a FL.

In the second half of the American report, on US students studying abroad, the IIE noted that the top 5 destinations for US students in 2012-2013 were: the UK, Italy, Spain, France and China, which also demonstrate a certain willingness by American students to be immersed in another language and culture (IIE 2014: 31). A focus on professional or career-oriented studies in other countries was also quite high, with STEM at 23% and Business at 20%. Social Sciences were also higher for American students (22% vs 8% for international students in the US) (IIE 2014: 31).

According to the National Languages and Literacy Institute of Australia, 12.8% of Australian students in grade 12 in 2014 studied a foreign language, with about half of these (5.8%) studying an Asian language (Blakkarly, The Diplomat, 2014). French is the most common language choice for grade 12 students, after Japanese, followed by Indonesian and German.

Returning to the Business Forum for Multilingualism, it issued four overarching recommendations in its final report:

1. Both formal and informal methods of language learning should be encouraged, for a wide range of foreign languages, as a means to significantly expand the multilingual workforce available to support today's European businesses.
2. Foreign language strategies need to be adopted by businesses, at the highest level of the company, across Europe. These should include: investing in language training, employing native speakers, and effective use of multiple languages in all electronic communications and on the Web.
3. Foreign languages being a fairly new area of management for companies, support should be provided to assist companies in implementing language strategies. Export promotion organizations, amongst others, can play a crucial role in this area.
4. Finally, the creation of a European platform for the permanent exchange of best practices regarding languages for business was recommended. In response to this, a business platform was created in 2009, now called CELAN, whose principal objective is to create an ongoing dialogue between the business community and language practitioners (see celan-platform.eu).

(Davignon et al, 2008: 6).

These four overarching recommendations expanded to include recommendations specific to companies, national governments, local and regional authorities, and to European institutions.

The Forum for Multilingualism noted that labour mobility is actually quite low in Europe, as has been noted elsewhere in comparison to the North American context. Only 2% of Europeans of working age live and work in another EU country, while the rates for workers from third countries, or those born outside of the EU, are almost double. Studies cited have demonstrated that knowledge of FLS was a factor in enabling or discouraging migration. Increasing FLS on the supply side will serve to provide greater incentives to take advantage of economic opportunities in more prosperous parts of the EU.

The European Union's Business Forum for Multilingualism recommended the following:

- Encourage both formal and informal methods of language learning for a wide range of foreign languages
- Businesses adopt foreign language strategies including investing in language training, employing native speakers, and using multiple languages in all electronic communications.

- 62 of 69 universities in 14 EU countries offer language courses to students not specializing in languages.
- 31 of the 69 universities offer courses in more than four foreign languages to non-language specialists.

Besides these, a widely quoted recent EC document, entitled **Language Rich Europe** (LRE) provides a useful overview of trends in multilingual language policies and practices across 14 member countries of the EU (Extra & Yagmur: 2013).

Through various surveys, they reviewed for each participating country which languages were used at the early childhood, primary and secondary and post-secondary levels, as well as in the national media, public and political spheres, census and other government surveys, and finally in the business sector. This

comparative survey provides a valuable inventory which can be used as a baseline reference tool of multilingual language use across many dimensions for the EU and for each of the participating countries. Noted for example, at the post-secondary level, 62 of the 69 universities in the 14 countries surveyed already offer language courses to students not specializing in language programs, which was a specific EC recommendation (Extra & Yagmur: 2013). In 31 out of 69 universities more than 4 foreign languages were offered to non-language students. It is also encouraging to note that, of the 63 towns and cities surveyed, public and municipal services were offered in 140 different languages in total across the sample, while only 10 cities did not offer any multilingual services.

9.1 THE EU: FOUR POLICY CATEGORIES OF DEMAND AND SUPPLY RELATED TO FOREIGN LANGUAGE SKILLS

Another EU policy initiative focussed on improving the contributions of the education and training sector, or the supply side, for FLL. An expert working group, entitled “Languages for Jobs” and composed of representatives of national ministries of education, was established by the European Commission in 2010 to produce policy recommendations to bring about a better match between the demand and supply of FLS in the European labour market (European Commission, European Strategic Framework for Education and Training (ET 2020), 2011). Their key findings echo much of the research on the subject, and give a sound basis for their recommendations. This literature review showcases just a few of the numerous, wide-ranging policy initiatives and best practices in the EU. A small selection which might be applicable to the Canadian context is provided in the Appendix to this paper.

The ET 2020 report of the working group, self-titled *Languages for Jobs*, categorizes these policy issues according to the following four policy categories:

1. Demand for languages and communications skills
2. Languages offered by the education and training sectors
 - a. Including appropriate teacher training, improved materials and methods for those languages
 - b. Languages offered in vocational (professional and trade) training
3. Validation or certification of acquired language and communication skills
4. Dialogue between business and the education and training sectors on language needs
(EC, ET 2020, *Languages for Jobs*, 2011)

9.2 A UK BEST PRACTICE: IDENTIFYING PRINCIPAL ISSUES IN TERMS OF MATCHING SUPPLY WITH DEMAND

Regarding the first category, the demand side for the UK was well covered in an earlier section of this literature review, which also served to demonstrate that there are a number of challenges involved in identifying employer demand, particularly in the public and voluntary sectors. Both Tinsley for the UK, and the *Languages for Jobs* report for the EC, note, that ministries of education and skills

development, schools and post-secondary institutions need to be aware that FLS have been empirically demonstrated as an essential requirement for a wide range of jobs.

LANGUAGES SUPPLIED BY THE EDUCATION AND TRAINING SECTORS

Following the *Languages for Jobs 2nd* category, the principal policy issues on the supply side for the UK, according to Tinsley, are:

- The level of participation in language learning in elementary and secondary school has declined dramatically where learning a foreign language (traditionally French and German) is no longer compulsory.
- The languages being taught, both the range on offer and the specific languages taught, are lower than needed in the workplace.
- The social balance in language learning, including the socio-economic status and gender of the learners, is placing barriers in career opportunities for school students at lower socio-economic levels. Boys are learning foreign languages less than girls in school, which compounds when entering post-secondary technical and professional programs, favoured by boys, which do not allot space in the curriculum for language acquisition or maintenance. FLS are most often needed at many levels of skills and seniority of an organization, not just at the top levels.
- Similar to Canada, there is no integration of language courses within vocationally-oriented programs at either college or university levels.
- There is a concern in the UK about the geographical spread of language learning and disparities between the four parts of the UK (England, Scotland, Wales and Northern Ireland). This might be applicable to Canada, either in terms of the rural-urban split, or between provinces and territories.

Another issue raised by Tinsley is that the pressures on the educational system for skills and training, including science, technology, engineering and mathematics (STEM) subjects has had a consequential effect of reducing foreign language training in the school system (Tinsley 2013: 40). These consequences have been similar in Canada. Unlike with STEM subjects, there has not been the same level of policy development on the linkages between languages, the economy and employability. The UK National Occupational Standards, however, do regularly canvas demand and supply for language skills such as translation and interpretation.

In addressing the issue of declining interest and motivation to study FLS in school, Mann (2011) reviewed policy initiatives designed to increase motivation to learn languages by providing language role models and introducing real-world examples of the usefulness of FLS for jobs at home and abroad. Two very popular British programs are the Business Language Champions (BLC) and Routes into Languages programs, which connect with employers and young role models to engage with local schools about the use of languages in real-life situations.

In one example, the Director of Operations of a local soccer club, Bradford City Football Club, employing several hundred people, engaged with the grade 11 class of a local boys school, and discussed how he used his Spanish to negotiate and sign a major Chilean soccer player (Mann, 2011: 30). Through the BLC, a range of activities were organized, such as bringing the Chilean soccer player to meet with pupils of different classes. This partnership has had a dramatic effect on uptake of language classes: Spanish to high

- Foreign language subjects in British schools has been reduced due to a pressure for skills and training in STEM subjects.
- Unlike with STEM subjects, there has not been the policy development on the linkages between languages, the economy and employability.
- The UK National Occupational Standards however regularly canvasses demand and supply for language skills, such as translation and interpretation.

school diploma level quadrupled. In another example, students in grade 9 in a Birmingham school were invited by Birmingham Airport to compete in designing a poster in French to promote tourism to their city. Again this had a direct effect on uptake of French to high school diploma level. The BLC has been a valuable intermediary to assist language teachers in finding real-life situations to motivate their classes.

Evaluations of the BLC program have been encouraging: 97% of teachers said that participating in the BLC program had increased students' appreciation of foreign languages; over four-fifths felt the program had increased students' intercultural awareness. Two-thirds felt that participation in the BLC program had had a direct impact on raising the take-up of language courses at grade 9 level (Mann, 2011: 22). As a result of programs such as these, by 2009, schools with language programs adopting work-life language experience programs were engaged at full capacity.

Schools with language programs using work-life language experiences saw take-up by students increase dramatically.

DIALOGUE BETWEEN BUSINESS AND EDUCATION AND TRAINING ON LANGUAGE NEEDS

Under the fourth category of *Languages for Jobs*, where a greater dialogue between business and the education and training sector could contribute to rebalancing language supply with business needs, the lack of dialogue has had some long-term consequences. The contribution of language skills to economic development and employment has been well established in the academic literature, however it is not part of general public or media awareness. This is also true in professional and technical streams, - MBA programs being the rare exception. Although it is recognized informally by people on the job who are active internationally and are well aware of these benefits. This paper has established from the literature that a greater range of occupations and levels in a hierarchy are in need of FLS, which should be recognized in the education system and by employers.

A best practice example from the UK is notable for the *Languages for Jobs* 4th category. Matching business-identified language requirements with supply of foreign languages has great potential for identifying areas of imbalance between supply and current future demand, as Tinsley notes from the following British example (see table below).

Key Languages Identified as Important in the British Labour Market and their Presence in Schools and Universities

(Green indicates a balance between business demand and supply; yellow a slight imbalance, and red a significant imbalance.)

Key languages currently required	Spoken by schoolchildren	Taught in schools	Available as post-secondary degree subject
Arabic			
Dutch	Small numbers	Assessed but not taught	
French			
German	Small numbers		
Italian			
Japanese			
Mandarin			
Polish		Assessed but not taught	Small numbers
Portuguese		Assessed but not taught	Small numbers
Russian			
Spanish	Strong in London		
Scandinavian languages: Danish, Norwegian, Swedish	Small numbers		Small numbers

Tinsley: 129, Figure 90

This exercise was also undertaken with British business to identify future language requirements for growing markets (see table below).

Languages of Future Growth Markets and their Presence in Schools and Universities

(Green indicates a balance between business demand and supply; yellow a slight imbalance, and red a significant imbalance.)

Languages identified for future growth markets	Spoken by schoolchildren	Taught in schools	Available as post-secondary degree subject
Akan			
Bengali		Assessed but not taught	Very weak
Cantonese			
Czech	Small numbers		
Farsi/Persian	Strong in London	Assessed but not taught	Very weak
Hausa			
Hindi/other Indian languages		Some assessed but not taught	
Igbo			
Indonesian	Small numbers		Very weak
Kazakh	Small numbers		
Korean			
Malaysian	Small numbers		
Tagalog	Especially in London		
Thai	Small numbers		
Turkish	Strong in London	Assessed but not taught	
Ukrainian	Small numbers		Very weak
Urdu			Very weak
Vietnamese	Small numbers		Very weak
Yoruba	Strong in London		

Tinsley: 130, Figure 91

Just as language audits are being encouraged with business, so too could Canadian cities and provinces assess the foreign languages available, either latent in immigrant communities, as well as those taught in schools, at post-secondary level and in adult education, in combination with the region's business demand for languages associated with their present and future markets. In, for example, the prairie provinces, the cereals, oilseeds and pulses agricultural sector is well aware of the present and future demands of their markets, as well as new trends, such as vegetarian and ethnic foods. There are language implications for these foreign markets; ethnic immigrants in Canada are acutely familiar with these foods, and can be drawn on to provide their language and cultural skills to assist with selling to their home country markets, and developing new, culturally appropriate food products. Agriculture and Agri-food Canada, together with provincial counterparts, assists with sector and market intelligence.

There is a major research opportunity to determine the shortage in technical foreign language skills for certain sub-sectors of the economy. This could benefit, for instance, the export market promotion and market access efforts of the Canadian agriculture sector to specific foreign markets by employing staff with language and cross-cultural skills that are relevant to those markets.

9.3 FRANCE: BEST LANGUAGE PRACTICES IN FRENCH ENTERPRISE

One of the major policy thrusts of the French government's branch of the Ministry of Culture and Communication responsible for the French language and languages of France (DGLFLF) is relevant to the purpose of this paper. Beginning with an extensive survey of the use of French and foreign languages in 15,000 French medium and large businesses across the country, completed in 2007,

the DGLFLF selected and compiled a guide of best practices from the survey, with the cooperation of the identified corporations. A sample of these is found in Appendix 1.

The department also created a website, entitled www.francaisautravail.org, and tools dedicated to the subject of languages at work for the use of French employers and workers. In cooperation with the Office québécois de la langue française, the practical guide has been updated and expanded with best practices from both France and Québec, available on the website.

10. CONCLUSIONS FROM THE RESEARCH FINDINGS

This review of the research of the past ten years has demonstrated that second language skills, or foreign language skills, are directly beneficial to individual workers and to companies, large and small. For the individual, the psychological research demonstrated significant cognitive and psycho-social benefits of bilingualism, along with the technical linguistic skills normally associated with knowing a second language. Following this, from an economist's perspective, the quantitative research demonstrated that SLS/FLS provide greater opportunities for labour mobility, choice of occupation along with greater earnings in many jurisdictions. FLS also helped to avoid job losses, using sector elasticity as a form of measurement.

For the firm, employer and job ad surveys showed that more large companies than small, especially their export divisions, but also divisions responsible for finance, IM/IT, sales, marketing, and purchasing as well as upper management, all rely on FLS. SMEs use first and foremost official language skills and secondly FLS depending on the market and often on the FLS of the SME owner. Public and para-public organizations also benefit from SLS/FLS, especially for those heavily reliant on the hard, technical skills of SLS, such as immigrant settlement services or schools. For the economy, macro-economic studies demonstrated that FLS brings economic benefits at the regional and national levels across jurisdictions. In terms of its impact on labour mobility, even with the outflow of bilinguals from one region, the economy as a whole benefits from the increased productivity realized when bilingual workers move to growing areas of the economy. In terms of job creation, the findings in New Brunswick demonstrated that two unilingual jobs were created for every bilingual job, and bilingual job growth was higher in certain private sector fields compared to the public and para-public sectors.

The qualitative research introduced the lingua franca concept and its strengths and uses in practice. Its weaknesses, particularly of English as a lingua franca, but also of other dominant lingua franca, became apparent. Research of business language practices has demonstrated that lingua franca is an overly simplistic approach for an organization to take, especially an organization active across many regions of different language, cultural and historical backgrounds. A nuanced approach which is tailored to the needs of the company and of its workforce, and links with other language-cultural areas, is recommended. A nuanced approach will provide for greater productivity and higher morale in the company workforce.

Various approaches to language practices at work empirically observed in the field were then presented, and a few theoretical alternatives were also proposed. "Muddling through" is essential for people from different language and cultural background who have to work closely together who have few, if any, language skills in common.

Some studies have also shown, however, that rates of bilingualism or multilingualism and market demand appear to be substantially lower in Canada than in many parts of Europe. And yet, the review has also demonstrated that the size of the language economy, from both a supply and demand perspective, is significantly larger than it appears to the uninitiated, as Tinsley demonstrated with her graphic pyramid. This is likely also the case in Canada. The understanding of the benefits of SLS/FLS by the average business owner or a postsecondary student is more often intuitive than factual.

Bel Habib discussed the situation where European SMEs lost substantial export contracts because they could not serve the potential client in a common language. This likely happens just as often in Canada. Whether companies are active in tourism, imports and

exports, or have national customer service centres, having a language policy in place and properly implemented is good risk management.

Findings from the review provide many practical suggestions for individual client-oriented organizations to ensure language skills are present if and when needed, some of which are reproduced in the Appendix below.

11.1 THREE PILLARS FOR LANGUAGE POLICY AND RESEARCH INITIATIVES

A strategic, comprehensive approach is proposed to maximize the benefits of bilingualism for the Canadian economy. Canadian policy positions could be considered in the following three categories or pillars:

- Promoting Business Use of Second Languages
- Jobs and Hiring
- Education and Training

A foundation of research and innovation could provide supportive evidence from the Canadian context and provide language tools and practices the three pillars mentioned above.

11.1.1 PROMOTING BUSINESS USE OF SECOND LANGUAGES

It is essential that Canadian businesses are made fully aware of the benefits of SLS/FLS to their bottom line, whether for the Canadian market or overseas markets. During difficult economic times, there are significant language assets which are being underutilized.

In support of this, a promotional campaign is needed, in concert with key stakeholders, including professional, business and labour associations, the provincial and territorial governments, the education and training communities and the language industry. Promotion must focus on demonstrating how these skills will benefit their bottom line and the productivity of their workforce.

The employment benefits of FLS/SLS must also be promoted to workers in the labour force, and to young Canadians considering their course selection, while at school and later in postsecondary institutions.

Bringing this issue out into the open, as has been done in Europe for more than a decade, will generate public discussion between employers and employees of organizations of all sizes. Generating discussion amongst business players should also serve to stimulate a better understanding of their language and cross-cultural requirements.

Tools to support business as they adopt a broader use of SLS/FLS are also needed, in terms of language industry tools and new human resource strategies for recruiting and supporting workers with SLS/FLS. The language tools of the PWGSC Translation Bureau, starting with Termium, are obvious candidates for sharing with the Canadian private sector.

11.1.2 JOBS AND HIRING

A concerted effort must be made to tie enhanced and visible demand for SLS/FLS with supply. As in the UK, there is likely a downward spiral of monolingualism in the labour market, despite the enthusiasm for French immersion in schools, and for English learning in Quebec. To paraphrase Tinsley, there may be a vicious cycle of weak or latent demand which is leading to a decline in visible supply (Tinsley: 134).

In Canada there is a need for more comprehensive and in-depth research into the FLS/SLS of Canadians, of both school and working age, and also of the demand for these skills by Canadian employers. The language needs of business in different sectors, occupations and fields, need to be documented and assess to what extent these needs are being met. Business can then act accordingly. A given company can then carry out a language audit of their own business, based on what is appropriate for their industry's characteristics.

It will also require an information strategy providing informational tools for key industries and occupations, particularly those which have not recognized their language needs, such as Finance and IT. Training course providers will also need to be kept informed of evolving language demands in the labour market.

11.1.3 EDUCATION AND TRAINING

The education system plays an important role in supporting these objectives by producing the supply of graduates with SLS/FLS. A goal is proposed to increase SLL and FLL in schools and postsecondary institutions.

Canada's official languages are the foundation upon which the country's cultural and linguistic diversity depends. Canada's national dialogue must continue to take place in two common languages. More broadly however, in reflection of the evidence, targets should be set for Canada's two official languages but also to increase the proportion of students, from all socio-economic and cultural backgrounds, choosing to study an indigenous, foreign or heritage language, depending on their personal backgrounds. Students in all academic and non-academic streams should be encouraged without exception. The research findings of both the psycho-social and economic and employability benefits emphasize this point.

Public measureable targets have a way of capturing attention across the educational system. Measurable targets for each system could take the following form:

Elementary and secondary schools:

Official languages:

1. Percentage of majority students registered in official language core and immersion programs
2. Percentage of OLMC students registered in minority language schools

Other languages:

3. Percentage of all students taking a FLL course (elementary and secondary)
4. Percentage of native students and immigrant students taking courses to maintain their mother tongue

Postsecondary level:

1. Percentage of professional/vocational students taking applied OL or FL training
2. Percentage of OLMC postsecondary students studying in their minority language

Baseline measures already exist for official languages education, and to some extent for native and international languages, on which such targets can build.

Engagement and promotion needs to be undertaken with players in the education system as well. One promotional initiative in partnership with business should be considered to convince students of the relevance of SLS/FLS for real-life situations. The British

example of the **Business Language Champions** program has proven very successful at raising student awareness of the value of FLS, by bringing working language role models to visit local schools.

At the postsecondary level, language learning needs to be integrated within vocationally-oriented programs at college and university, such as STEM and professional programs, such as Commerce, Law and Computer Science. Faculties of STEM and professional programs need to recognize the realities of the global workplace of their graduates and allow room in the student timetable for language training.

Innovation and pragmatism is beneficial here. Recognizing the program demands of these students, a highly applied learning format needs to be adopted for these students.

Adult Training

A high-level dialogue should be instituted between business associations and the language learning industry to ensure that business demands are reflected more readily in course offerings and in language learning materials for specific occupational or industry areas.

Language training continues to be essential once on the job, for those using their SLS/FLS, whether in the form of staying up to date of technical terminology in one's area of activity, second language maintenance, or learning the basics of conversation skills of a new language. European business best practices also emphasize the importance of cross-cultural training (see examples of successful SMEs from the Pimlico study in Appendix 1).

11.2 THE PARTICULAR CASE OF OFFICIAL LANGUAGE MINORITY COMMUNITIES

Labour mobility particularly affects OLMCs. OLMC members tend to be bilingual, and to be more adaptable and more willing to migrate to follow economic opportunities in other parts of Canada. Additional programs to ensure their social integration in their host region should be explored. Equally vital are programs to assist with their economic reintegration should they return to their home region, as they will be returning with new skills, experience, and savings and assets which they accumulated while out of the region. Policies & programs should be in place, such as for example, training to transfer their skills to areas more applicable to the local economy, advice on how to set up a small business, and the local economic development agency should be tapped to provide information on local investment opportunities.

11.3 THE ROLE OF FEDERAL INSTITUTIONS

Federal institutions, all of whom must carry out their OLA Part VII obligations to enhance Canada's two official languages, can act as vehicles for change, setting new policy directions, raising awareness amongst their key stakeholders, and providing tools and support for policy implementation.

Appendix 1 outlines a number of additional policy and research proposals, as well as European best practices, which can be considered for policy-making bodies in Canada as well as the private sector.

GLOSSARY OF TERMS AND COMMON ACRONYMS

Term	Definition
Bilingualism	The ability of an individual to speak a second language (L2) in addition to his or her mother tongue (L1). In contrast to multilingualism or plurilingualism, bilingualism can refer to both bilingual speakers and to bilingual organizations, where two languages have equal status (See Christofides and Swidinsky 2008; New Brunswick 2015)
FLE	Français langue étrangère (See Majdi)
FLS or FLL	Foreign language skills or foreign language learning (see SLS and SLL below)
FOLS	First official language spoken (Statistics Canada, common Canadian reference statistic)
ISCED	International Standard Classification of Education (Aparicio and Kuehn 2013: 3)
L1	Mother tongue (Linguistic terminology)
L2	Second language learned/acquired (Linguistic terminology)
L3, L4	Third and fourth languages learned (Linguistic terminology)
LEAP	Langues étrangères dans l'activité professionnelle (Study by Grin et al, 2009)
Lingua franca	A language that is adopted as a common language between speakers whose native languages are different. Also known as a trade language or a vehicular language (e.g., Swahili or Arabic in Africa). English has become the lingua franca in a number of industries. Historically, lingua franca was a common language consisting of Italian mixed with French, Spanish, Greek, and Arabic that was formerly spoken in Mediterranean ports. (Merriam-Webster)
Lingua receptiva	The ability of speakers of neighbouring languages to listen, generally understand, and respond in one's mother tongue (e.g., between Danish, Swedish, Icelandic and Norwegian speakers, or between French, Italian, Spanish, Portuguese and Rumanian speakers). (See Luedi 2012: 3)
Linguistic distance	An explanatory variable built on the gravity model used to explain labour mobility of migrants. Exposure to foreign language learning can be used to reduce this distance. (See Aparicio and Kuehn 2013:5)
Multilingualism	The co-existence of several languages within a group of collaborators or colleagues, or an organization. (See Zappacosta)
Network externality of language	The larger the number of individuals who use a language, the more useful that language is as a tool of communication. (Grenier, Nadeau 2013: 4)
OLA	Official Languages Act (Canada)
OLMCs	Official Language Minority Communities (Canada)
Plurilingualism	The ability of one individual to speak several languages at different skill levels. (See Zappacosta). L'usage de plusieurs langues par un même individu. (See Observatoire Européen du Plurilinguisme (OEP), cited in Tréguer--Felten 2013: 48.)
SLA	Second Language Acquisition "SLA is often used as a cover term to refer to any language other than the first language irrespective of the type of learning environment and the number of other non-native languages known by the learner."

SLS SLL	Second language skills, second language learning (in education) (see FLS and FLL)
SMEs	Small and medium sized enterprises
STEM	Science, technology, engineering and mathematics (academic subjects)
TIBEM	A Belgian institute called Tweektaligheid In Beweging – Bilinguisme En Mouvement (TIBEM)
Unilingual	The ability of an individual to communicate only in his or her mother tongue (L1). Also monolingual.

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APPENDIX 1: CONSIDERATIONS FOR LANGUAGE POLICY INITIATIVES AND FURTHER RESEARCH

1. LANGUAGE POLICY CONSIDERATIONS FOR THE PRIVATE SECTOR

Language policy considerations	Criteria	Tool
a) Know the language capabilities of the company workforce well	Which languages; what level (basic, advanced), what specialized field (medical, geology, aerospace engineering etc.)	HR to have an inventory of language skills on hand available for all managers
b) Know the language profile of the markets or client base that the company serves, or wishes to serve (current, short-term, medium-term, long-term)	Export markets – national or regional language(s), typical “intermediary language” (English, French etc.) Local clientele – city’s language profile, incl. of immigrant and mobile worker population	Add a language component to the company marketing plan. Use government Census and other reliable data to your market study.
c) Know the language profile of overseas suppliers	Suppliers of inputs – national or regional language(s), typical “intermediary language” (English, French etc.)	Document language issues in supplier records
d) Compare a) to b) and c)	Know the organization’s language strengths and weaknesses vs your market priorities and supply chains. Ensure the main clients or export markets are served in their preferred language. Ensure you have effective communications and language interaction with your important suppliers.	Do a cost-benefit and risk analysis plan in terms of the organization’s language capabilities.
e) For lesser priority language markets and suppliers, have a plan B in place	Draw up a list of consultants, such as interpreters, translators, retired engineers or trade specialists, to draw on if and when, for ex.,: <ul style="list-style-type: none"> • A potential client unexpectedly appears with a major request; • Or, sudden need to expand company supply of a given input by 500%, needing to acquire more suppliers. 	Keep the list of multilingual consultants up to date. Quote a commission (e.g., a certain amount per call, a certain amount per meeting), to maintain their interest in being on the list.

2. EXAMPLES OF PRIVATE SECTOR LANGUAGE MANAGEMENT STRATEGIES

Size of organization	Type of organization	Specialist lang. required	Main languages and common secondary languages; activities	Language management strategy of the enterprise	Adaptation strategies
<p>Large (over 100 staff)</p> <p>Annual turn-over 55m €</p> <p>Exports as % of sales: 90%</p>	<p>Construction</p> <p>Best practice</p> <p>“Super-SME”: IKO Sales Int’l, Belgium</p> <p>(Pimlico study 2011)</p>	Some technical	Hungarian and Polish translators are used; native speakers are hired for France, Germany, Poland, Slovakia, Slovenia, the Czech Republic, Hungary and Romania, thereby avoiding language and cross-cultural misunderstandings.	<p>Company works to be functionally competent in English, German, French, Russian, Czech and Romanian.</p> <p>Using native speakers correlates with increased trade volume.</p>	Prefers native speakers working out of head office in Belgium. When necessary, uses local agents hired on-site, however can increase labour obligations.
<p>Medium (75 employees)</p> <p>Annual turn-over 25m €</p> <p>Exports as % of sales: 98%</p>	<p>Electronics accessories</p> <p>Best practice</p> <p>“Super-SME”: Golla Oy, Finland</p> <p>(Pimlico study 2011)</p>	Wholesale, consumer fashion accessories	Country subsidiaries in China, France, Germany and Japan are all managed by local native speakers who first worked at the company head office in Helsinki.	<p>Always strives to communicate in its customers’ languages.</p> <p>Translation and interpretation done in-house. Native speakers also hired for offices in Canada, Austria, Lithuania, Korea, Poland, and Vietnam. Company website available in seven major languages (incl. Russian, Japanese and Chinese)</p>	Local agents and distributors are only used when dictated by market regulations.
<p>Large (over 100 staff)</p> <p>Annual turn-over 36m €</p> <p>Exports as % of sales: 95%</p>	<p>Manufacture of nonwoven textiles</p> <p>Best practice</p> <p>“Super-SME”: Filc DD Menges, Slovenia</p>	Textiles	Employees expected to speak at least two languages, of which: English, French, Italian, Russian, Turkish and Spanish. In addition cultural briefings are regularly provided on the above plus	Based on an international human resources strategy and on support for staff FLS. Ties in with a sales policy based on excellent customer care and building long-lasting relationships with buyers.	Native speakers are employed as sales representatives and agents, particularly for new markets. Native speakers also provide regular cross-cultural training sessions to employees.

Size of organization	Type of organization	Specialist lang. required	Main languages and common secondary languages; activities	Language management strategy of the enterprise	Adaptation strategies
	(Pimlico study 2011)		on the cultures of Ireland and the US.	<p>Language requirements are included for each job description at time of recruitment.</p> <p>Encourages its employees to work in/with markets for which they have the FLS and cultural understanding.</p> <p>** Partners with universities and educational institutions in Slovenia and overseas markets, which provide up-to-date sources of terminology and research.</p> <p>Its language strategy led to an increase of 25% in company turnover.</p>	
<p>Small (under 50 staff)</p> <p>Annual turnover 1-3m €</p> <p>Exports as % of sales: 30%</p>	<p>Best practice “Super-SME”: Kartographie Huber, Germany (Pimlico study 2011)</p>	<p>Education, cartography</p>	<p>Employs native speakers in 17 languages, ranging from west European languages to Croatian, Russian, Arabic, Farsi and Swahili.</p> <p>Each employee must speak English and at least one other language of one of the markets served, and attend language courses.</p>	<p>Strong emphasis on speaking the language of the customer in order to build trust and interest.</p> <p>FLS required at recruitment; provide FLS training and country exchanges. Employees in subsidiaries also participate in language and cross-cultural training. Keeps records of</p>	<p>Native speakers are used. Work with professional interpreters and translators whenever possible, particularly for Chinese, Swahili and French.</p>

Size of organization	Type of organization	Specialist lang. required	Main languages and common secondary languages; activities	Language management strategy of the enterprise	Adaptation strategies
				<p>employee language and cultural skills and training.</p> <p>Constantly seeking new techniques to deal with language issues.</p> <p>Increased its turnover by 16-25% with its language management strategy.</p>	

3. AVENUES TO CONSIDER FOR PUBLIC POLICY INITIATIVES

Policy area	Rationale (Reference to existing Canadian policies or programs)	Context (Has it proven useful in other jurisdictions)	Potential policy initiative	Target group	Potential partners and stakeholders
<p>Promoting FLS use in business:</p> <p>Export trade development</p>	<p>Research has demonstrated that export/trade is one of the business fields which most benefits from FLL.</p> <p>Existing Canadian policy or programs: Very little, if any, dialogue or initiatives with private sector or occupational groups on the value of FLL and of language training needs or programs</p>	<p>For the EU, e.g., Hagen (2011)</p>	<p>Develop a Language Guide for Canadian Business. Make the benefits and links between FLS and increased exports more explicit. Draw on Canadian research findings on both Canadian supply and demand. Promote FLS to companies, university and college professional programs, etc.</p>	<p>Canadian business, exporters</p>	<p>The Trade Commissioner Service (Global Affairs Canada), Industry Canada</p> <p>Others will depend on the initiative, e.g., schools, post-secondary programs, professional and vocational programs. And/or:</p>

Policy area	Rationale (Reference to existing Canadian policies or programs)	Context (Has it proven useful in other jurisdictions)	Potential policy initiative	Target group	Potential partners and stakeholders
					professional associations or accrediting bodies, such as in law, engineering
<p>JOBS & HIRING:</p> <p>Youth employment; export promotion</p>	<p>As in other countries, Canadian youth have little international experience, despite the fact that it improves their communications, social and language skills and hence their employability.</p> <p>Merits: to give young Canadian graduates international work experience within a supervised environment; to give Canadian SMEs a means to reach out to a new market in a cost-effective manner</p>	<p>France: International Voluntary Service in Company (VIE). The intern's services can be shared amongst SMEs in the same industry or region. Student's overseas costs paid by the SME.</p>	<p>Program supporting interprovincial and international work internships for Canadian youth through Canadian companies. Interns overseas are based out of a Canadian embassy / consulate or regional office and are advised by a Trade Commissioner at mission.</p>	<p>Beginner exporters, SMEs; young Canadian graduates</p>	<p>The Trade Commissioner Service (Global Affairs Canada), ESDC, Industry Canada</p> <p>Provinces, territories, sector associations</p>
<p>Global supply chains management</p>	<p>Grin et al demonstrated that the procurement function is as dependent on FLS as exports and sales. Procurement typically includes expediting, supplier quality, and transportation and logistics (T&L) in addition to purchasing. Finance and accounts also require FLS.</p>	<p>Not known.</p>	<p>FLS internship for accounting and engineering students</p>	<p>Students in commerce, business or engineering; accounting students seeking their designation (e.g., Chartered Professional Accountant)</p>	<p>ESDC, IC, provinces and territories, ministries of education</p> <p>Large companies, CPA and engineering associations</p>

Policy area	Rationale (Reference to existing Canadian policies or programs)	Context (Has it proven useful in other jurisdictions)	Potential policy initiative	Target group	Potential partners and stakeholders
Education	<p>An international multi-lingual platform which enables searches in 10 major languages of scientific information from institutional databases in over 70 countries. Improves global access to scientific research, encourages international collaboration. Non-text information (data and multimedia) also searchable. New applications foreseen for the security and intelligence community, risk analysis community and multinational corporations, all of whom could benefit from the multilingual and international search capabilities available in the WorldwideScience application.</p>	<p>worldwidescience.org</p> <p>Best practice from the US, now international initiative</p> <p>(Nikuze (2013))</p>	<p>Create a bilingual educational version (K-12) for the Canadian context, an online platform which enables searches in English and French from Canadian institutional databases to encourage bilingual collaboration amongst STEM students across Canada.</p>		<p>Science-based departments and agencies</p> <p>CMEC, provinces and territories</p> <p>Canadian Parents for French</p> <p>OLMCs</p>
Education	<p>The education system plays an important role by producing the supply of graduates with SLS/FLS. Setting achievable policy targets will motivate actions to increase SLL and FLL in schools and postsecondary institutions.</p>	<p>EU target of 1+2 languages (Barcelona 2002)</p>	<p>Establish measureable targets for SLL/FLL in education:</p> <p><u>Elementary and secondary schools</u></p> <p>Official languages:</p> <ul style="list-style-type: none"> • % of majority students registered in OL immersion • % of OLMC students registered in OLMC schools <p>Other languages:</p> <ul style="list-style-type: none"> • % of all students taking a FLL course 	<p>Majority community students</p> <p>OLMC students</p> <p>Native students</p> <p>Ethnic community students</p> <p>Academic and non-academic streams</p>	<p>CMEC, provinces and territories</p> <p>OLMCs</p> <p>Canadian Parents for French, Canadian Languages Association</p>

Policy area	Rationale (Reference to existing Canadian policies or programs)	Context (Has it proven useful in other jurisdictions)	Potential policy initiative	Target group	Potential partners and stakeholders
			<ul style="list-style-type: none"> • % of native and ethnic/immigrant students taking courses to maintain their mother tongue <p><u>Postsecondary level</u></p> <ul style="list-style-type: none"> • % of professional/vocational students taking applied OL, FL or cross-cultural training • % of OLMC postsecondary students studying in minority language <p>Baseline measures already exist for OL education, and to some extent for native and international languages, on which targets can be built.</p>		
<p>Education: Supply barriers to bilingualism</p>	<p>Employer engagement to raise student awareness of relevance and value of foreign languages in real-life situations.</p> <p>While most Canadian school children are taught English or French as a second language, many fail to achieve functional bilingualism. In a New Brunswick study, fewer than 10% of early French immersion students had</p>	<p>UK <i>Business Language Champions</i> and the <i>Routes into Languages</i> programs. Increase in take-up of language courses, up to 400% (Mann)</p>	<p>Connect with employers and young role models to engage with local schools about the use of languages in real-life situations. Consider also engaging professional schools and associations (e.g. engineering, law, accounting) who often have international</p>	<p>Core French and immersion students</p> <p>Local business and local school boards</p>	<p>PCH, provinces and territories, ministries of education, CMEC</p> <p>Local businesses using foreign languages (hockey, soccer clubs, translation)</p>

Policy area	Rationale (Reference to existing Canadian policies or programs)	Context (Has it proven useful in other jurisdictions)	Potential policy initiative	Target group	Potential partners and stakeholders
	<p>attained the provincial minimum goal 12 years later, while less than 1% of students enrolled in core French had done so. (CCL 2008)</p>		<p>component to their work.</p>		<p>agencies, importers and exporters, multinational corporations, tourism/travel sector, police, resettlement agencies)</p>
<p>Language industry tools</p>	<p>Federal public servants have access to some self-testing resources.</p>	<p>Initiative of the Business Platform for Multilingualism (EC, 2011)</p>	<p>Provide a web-based language self-assessment tool, and guide user to repository of proven language strategies and policies for business users.</p>	<p>Adult learners of SL, including language maintenance</p>	<p>Translation Bureau, CSPS, Industry Canada</p>
<p>Business support: language industry tools</p>	<p>Help the business community and training providers to collaborate on matters of language and cross-cultural communication.</p>	<p>CELAN project initiative of the Business Platform for Multilingualism (EC, CELAN, 2011)</p>	<p>Drawing from Canadian research into private sector foreign and OL language needs; survey of language industry tools and services from perspective of variety of business sectors and company size; develop variety of solutions for business multilingual needs, - online and interactive, management toolkit, repository of best practices</p>	<p>Private sector active internationally or cross-culturally or planning to do so</p>	<p>Translation Bureau, CSPS, Industry Canada PTs, sector associations, professional associations</p>

Policy area	Rationale (Reference to existing Canadian policies or programs)	Context (Has it proven useful in other jurisdictions)	Potential policy initiative	Target group	Potential partners and stakeholders
Language industry tools	Termium and other tools and services of the PWGSC Translation Bureau		Multilingual glossary for STEM fields, tourism, travel and other business sectors		PWGSC Translation Bureau, sector departments (Transport, CBSA, SBDAs)
SLS as assets For OLMCs	Done for certain fields in Canada, such as law and health, particularly in workplace training. Expand to entry level and to the high school or post-secondary level (guidance counselling) and consider other fields.		Target bilingual OLMC members more directly for training and hiring as professional intermediaries (translators, interpreters, doctors, social workers, teachers etc.)	bilingual OLMC members	PCH OLMCs
OLMC education	Learning in one’s mother tongue leads to better learning outcomes and better use later in life. Exchange programs where students learn STEM subjects internationally in a foreign language. STEM is complex and varied; approaches need to be tailored to individual sub-disciplines.		Expand range of STEM and professional studies available in minority language, both in high school and PS institutions. Include bilingual terminologies to facilitate language switching and translation to interlocutors. Multilingual glossaries for teaching recent immigrants.	OLMCs, recent immigrants	PT ministries of education, CMEC
Distance education	Canada: Distance education is a proven means by which to expand the breadth and depth of educational programs to remote and underserved groups, as well as for programs attracting	US – Instructional Technology Council survey of members finds many	Expand use of distance education to bring specialized language programs to remote/rural OLMCs. Also for SLL	OLMCs	PCH, IC Telesat, telcos

Policy area	Rationale (Reference to existing Canadian policies or programs)	Context (Has it proven useful in other jurisdictions)	Potential policy initiative	Target group	Potential partners and stakeholders
	smaller student populations. This would serve in the language context, for example for second official language, minority or regional languages. See case study in a rural First Nation.	benefits of distance learning for students	of majority communities.		

4. RESEARCH PROPOSALS

Policy area	Context and rationale (Research in other jurisdictions)	Suggested research proposal	Target group	Partners and stakeholders
Social policy and FL teaching	There is substantial evidence on the value of majority language learning by immigrants and their children, and some evidence on the long term benefits of young immigrants maintaining their mother tongue in their new country. Few studies examine the benefits of FLL of majority students (immersion programs) or other large groups.	To document the findings on the economic returns of FLS. The returns to society for each dollar spent on SL or FL teaching (school, university, continuing education).	Immersion students, OLMC students	PCH, ESDC, provinces, CMEC, TBS and CSPS
Economic policy	Both governments and private sector face the costs of translation. Grin proposal (Grin, in Dorif: 10)	The equilibrium price in the translation market.	Gov't departments, companies, professional associations, HR professionals	Translation Bureau, PTs, Industry Canada
Labour market skills requirements	A similar project was proposed as part of the EU CELAN program.	Research the SL and FL needs of Canadian business and workers and assess to what extent these needs are satisfied by current language learning provided by the education and training sectors and across provinces and territories.	Canadian labour force and availability of language training	PCH, ESDC, IC, provinces and territories
Business HR tools (or	A language inventory tool if available would encourage businesses to better know the	Develop a language inventory template for the private sector.	Human resource managers	ESDC, IC

Policy area	Context and rationale (Research in other jurisdictions)	Suggested research proposal	Target group	Partners and stakeholders
applied research)	FLS of their staff. This is the first step to greater use of their staff's FLS.	Incorporate findings of language requirements of key occupations (finance, exporting, sales and marketing, engineering) and key sectors (manufacturing, commodities trading, engineering consulting services, tourism).		
FLS of immigrants	Recommendation to the EC by the Business Platform for Multilingualism (2011)	Document the language resources available in immigrant communities for the purposes of making them more widely known and available for exporters and other businesses.	Multicultural / immigrant communities	ESDC, CIC, DFATD
Labour market audits of language use	By undertaking new research into available Canadian data, the New Brunswick study demonstrated that two unilingual jobs were created in private sector for every bilingual job.	Undertake language profiles by occupation and industry of provinces and territories following the New Brunswick model, starting with Ontario and Quebec.	OLMC and ethnic communities	ESDC, IC, provinces and territories