



Lifelong Learning Programme



Language Strategies for
Competitiveness and Employability

D1.3 REPORT ON LANGUAGE NEEDS IN BUSINESS – COMPANIES' LINGUISTIC & LANGUAGE RELATED NEEDS IN EUROPE

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Author: COTANCE
Contributors: EURASHE (primary data analysis and graphs), EMF (ICT Sector Report), OEP (initial comments), other WP partners (comments)

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Foreword

Within the Framework of the EU Commission steered Business Platform for Multilingualism that together with the Social Society Platform were set up for informing policy makers on language needs, a number of stakeholders presented in partnership a project proposal aiming at identifying language needs in the business community in Europe and providing through Internet based instruments companies assistance in identifying their individual needs and associating to those needs access to information on how to fill those needs with market based tools and services (CELAN).

The identification of Business Needs constitutes the content of Work Package 1 of CELAN. This report presents the results of a business consultation across the EU undertaken by the Work Package Partners.

Significant information on language needs is already available in the literature and all underline the same fundamental principle, namely that languages are important in life, for business, for mobility, for employability, for cultural integration, etc. They are based on consultation of stakeholders in the area of languages and education with varied success in the response rate by business. The results of such consultations provide each insight of the possible language needs from different angles. The consultation of business in this report confirms the importance of language skills in general and illustrates the language needs of business from a sector perspective.

The consultation of the business community ran from March to June 2011 through a paper and web-based questionnaire.

The response rate of business (543 responses from 29 European countries) can be judged satisfactory, in line with other similar consultations. 157 responses (29%) were received from Business Representative Organisations (BROs) highlighting collective language needs in the several sector categories of the CELAN consultation.

The picture that appears from the analysis of the collected data reveals a Business community that is quite well informed about the market in terms of language tools and services, but still struggles to understand fully how to integrate more centrally languages in their business strategies.

Context

The CELAN Consultation takes place in a highly sensitive point in time for the global economy.

Globalisation has become a daily reality for EU businesses, both at European and International level. Further to the substantial intra-EU trade, the EU 27 is a global leader in the trade in goods with a trade value slightly above the €1000 billion mark, both in exports and imports over the period 2004 and 2009. In 2009 the EU held a 17% share in the world trade. In short, the EU is the biggest exporter and importer in the world. EU Business stands behind this trade and behind the companies are human resources who require valid skills for the sustainable development of EU business.

The economic momentum, however, is delicate. The business community in Europe was slowly recovering from the financial crisis that started at the end of 2008, when in the first semester of 2011, with the emergence of the debt crisis, the signs of likeliness of a double-dip seemed to become more and more prominent.

Restructuration and structural adjustment processes are generating alarming levels of unemployment in various EU member States and the competition for the remaining jobs becomes intense.

Languages and language skills in such a context are particularly valuable assets for business as they allow to reach out to foreign business partners for securing growth and employment, communicating more efficiently with headquarters or subsidiaries and human resources and consolidate the image of a company that is capable to compete on a market without borders.

The CELAN consultation reached business in the midst of fears regarding a further slowdown or even stalling of growth and cuts in public spending, notably in education system reforms, undertaken by governments struggling to balancing their budgets. The provision of language skills required by businesses in Europe is likely to becoming increasingly a responsibility of business and individuals.

Awareness of business on these factors and guidance on how developing appropriate language strategies for fulfilling their needs, are the key concerns of the CELAN project.

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1. Introduction

Methodology

The questionnaire was structured in four sections:

1. Respondent details (6 questions)
2. Experience with languages (9 questions)
3. Language needs (4 questions)
4. Final technical questions for any follow-up (2 questions)

The two central sections covered different areas, all closely linked to the ways and the extent to which EU Business use languages, from recruitment of staff, language training, use of language tools and services, through social, cultural and economic aspects, to the motivation of businesses in their language strategies.

The 21 questions of the survey either proposed a set of pre-formulated answers or called for free comments. Some were a mixture of both.

The CELAN consultation targeted European Business operators independently of their size. It aimed at two types of respondents: individual companies and Business Representative Organisations (BRO's). BRO's were invited to respond on behalf of their membership and to provide as many collective responses as distinct interests for sub-sector categories could be identified.

The questionnaire was prepared in 5 different EU languages (EN, FR, DE, ES, IT) and circulated to the Business community through a mailing list of BRO's and individual companies set up by the various WP Partners to whom different geographical or functional zones were attributed. An additional language version in Romanian was prepared by OEP.

The following table brings the allocation of geographical constituencies to the various Work Package Partners of WG 1:

	COT.	ELC	FUB	UniVie	FAV	EMF	CBS	E/Space	EUCA	OEP
Northern & Central Europe			DE,	AT,			DK, SE, SF, UK IR	NL, BE, LU		FR
Southern Europe									IT, ES, PT, GR	
Eastern Europe			PL	HU, SV, SK				Baltic (LT, LV, ET),		RO, BG, CZ
Other	BXL (EU)	Berlin				ICT				

The CELAN consultation ran from March to June 2011 and used both paper-based and web-based tools for the survey.

Awareness-raising about the survey took the form of notices on various web pages of the CELAN partners sites, the announcement of the action in the Business Platform for Multilingualism and direct notification to a large number of BRO's and individual firms.

Participation

Total number of responses

The number of finalised responses received amounted to 543.

EU public consultations receive on average between 200 and 500 responses. The 543 finalised contributions to the CELAN survey on language needs of businesses represent thus a satisfactory participation rate for public consultations at European level.

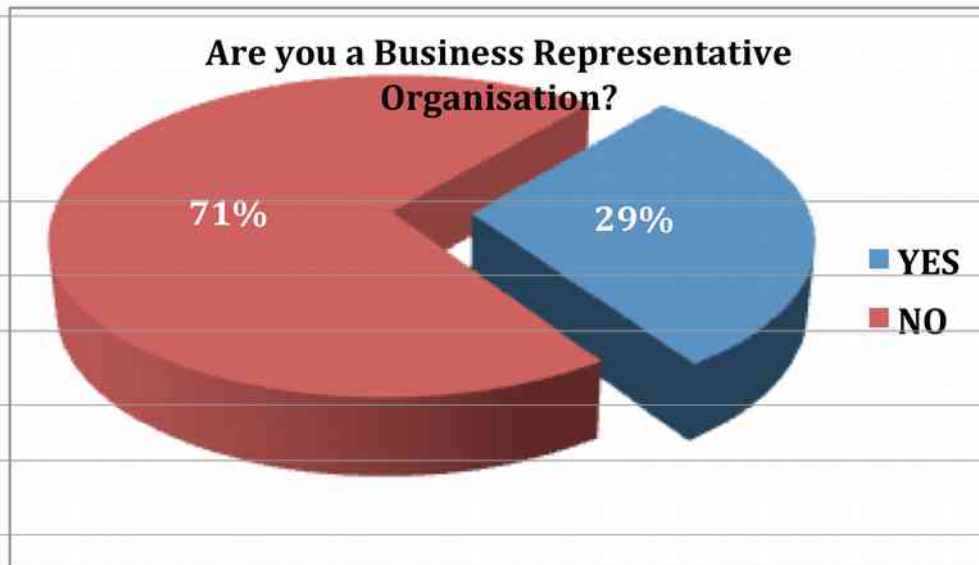
While this sample size does not allow for quantitative extrapolation of results, it provides a qualitative overview on the needs of the European Business community.

The CELAN partners understand that Europe-wide consultations are a particular challenge, notably when it comes to consult the business community. It is probably impossible to achieve a sample that accurately reflects the structure of the European business community by sector and company size category. Hence, data of any given consultation is necessarily distorted and it is the peer review that allows redressing possibly misled findings.

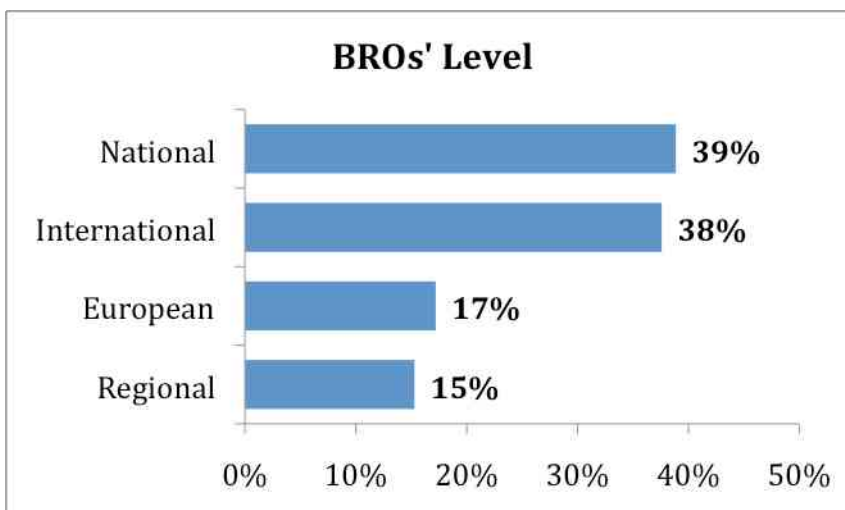
Aware of this, the CELAN project is setting up a web-based tool that will store the data of the current consultation and allow that every new additional respondent enriches the database with own intelligence and compare answers with the answers given by all other respondents, thus creating a living report that evolves over time, getting always more accurate.

Collective Responses

157 contributions were received from Business Representative Organisations (BROs).



The response rate (29%) of organisations representing the Business community vertically (sectors) or horizontally (cross-sectors) is significant.



It is interesting to note that the largest amount of collective responses comes from National organisations (39%). These together with Regional organisations (15%) are BROs that normally have a direct contact to affiliated companies and thus a clear understanding of their needs.

European and International BROs are generally so-called “umbrella” organisations gathering as members other BROs. Their contact with affiliated companies is often indirect. The precise characterisation of the needs of affiliated enterprises is probably more difficult for them as they may tend to respond on the basis of “typical” companies, while there is no such typical company in reality. With 38% and 17% contributions of International and European BROs, there is a good balance between “umbrella” organisations and “direct contact” organisations.

The sectoral distribution of these collective contributions has been as follows:

Sectors	International	European	National	Regional	Total
<i>Agro-Industry</i>	5	1	1	1	8
<i>Manufacturing</i>	19	7	14	4	44
<i>Retail & Distribution</i>	1	2	11	2	16
<i>Services</i>	9	10	21	7	47
<i>ICT</i>	12	4	4	4	24
<i>Multisector Org.</i>	5	2	4	2	13
<i>Other</i>	7	1	8	3	19
Total	58	27	63	23	171

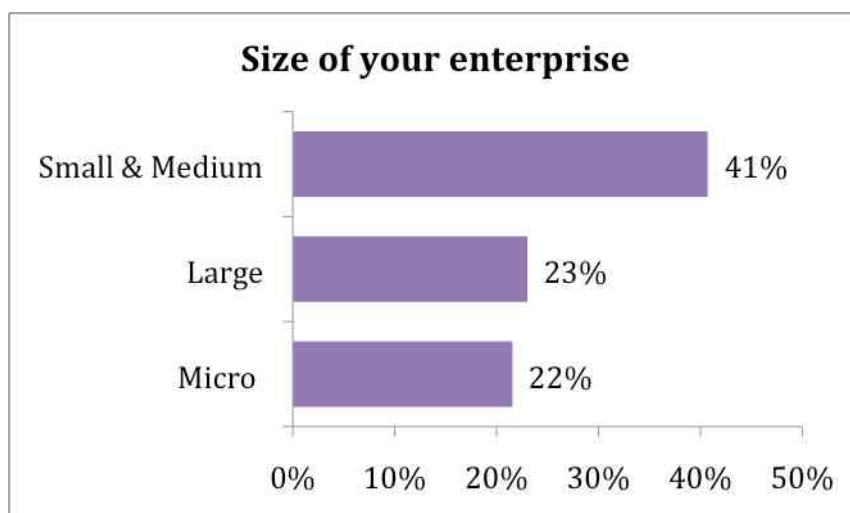
Note: The overall total is higher than the total of responses received from BROs as some ticked several options as they fulfil representative functions at various levels.

The survey presents however a prevalence of individual respondents (71%) over BROS (29%).

Individual Business Responses

386 contributions were received from individual companies.

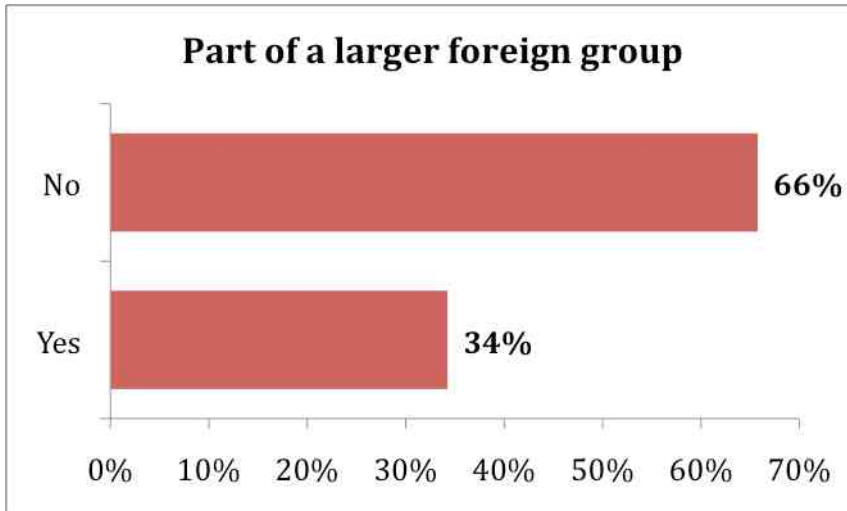
The biggest share of Businesses responding to the CELAN Questionnaire is the one of small and medium sized companies (41%), followed by a 23% of large enterprises and 22% of micro businesses.



The distribution of enterprises in the sample does not precisely reflect the structure of the overall EU 27 business community. (The latter hosted in 2006 20 million active enterprises in the Non-financial business economy. These enterprises were to 91,8% micro, 6,9% small, 1,1% medium and 0,2% large enterprises.)

The large proportion of "large" enterprises can be explained in part by the fact that there were enterprises forming part of a larger foreign group. This

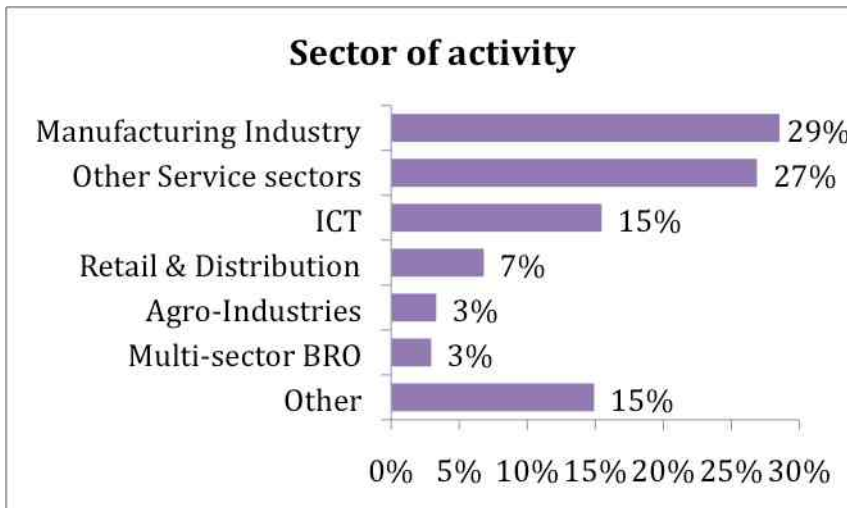
is notably the case in many responses from Central and Eastern European Member States.



A total of 34 responses (nearly 10% of all the individual company responses), however, were from large enterprises that declared not to be part of a larger foreign group.

All 82 responses having reported to be large companies were distributed in the services sector (28), in the manufacturing sector (23), in the ICT sector (10), and in the "other" category (17).

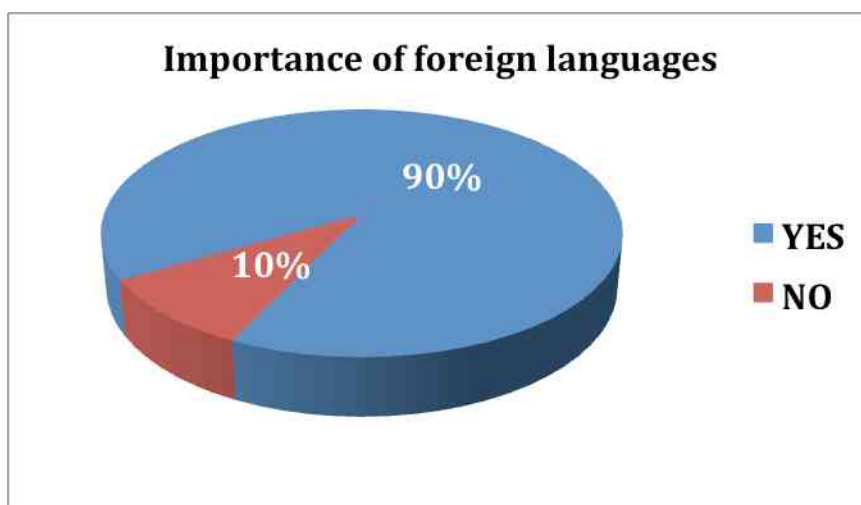
Overall the distribution of all 543 contributions by sector of activity was as follows:



2. Analysis of Feed-back by questions

2.1. General questions about language use

Question: "Does the knowledge of foreign languages in your enterprise matter for its operation or its competitiveness on the market?"



The overwhelming majority of responses received indicate that language skills are important for European businesses. BROs indicated a slightly higher degree of importance (95%) than individual companies (90%) signalling possibly a greater awareness of the importance of languages for their membership. Also the Agro-industries and Manufacturing sector associate a greater importance than the average to foreign languages (94%) compared to the ICT sector (92%) and the Retail, Distribution and Services sector (89%).

The differences at sector level are, however, not very significant.

For those 51 respondents indicating that the knowledge of foreign languages was not essential for their business, 9% explained that this was due to the fact that they are exclusively devoted to the domestic market, and 2% because they would be outsourcing when language skills would be eventually required.

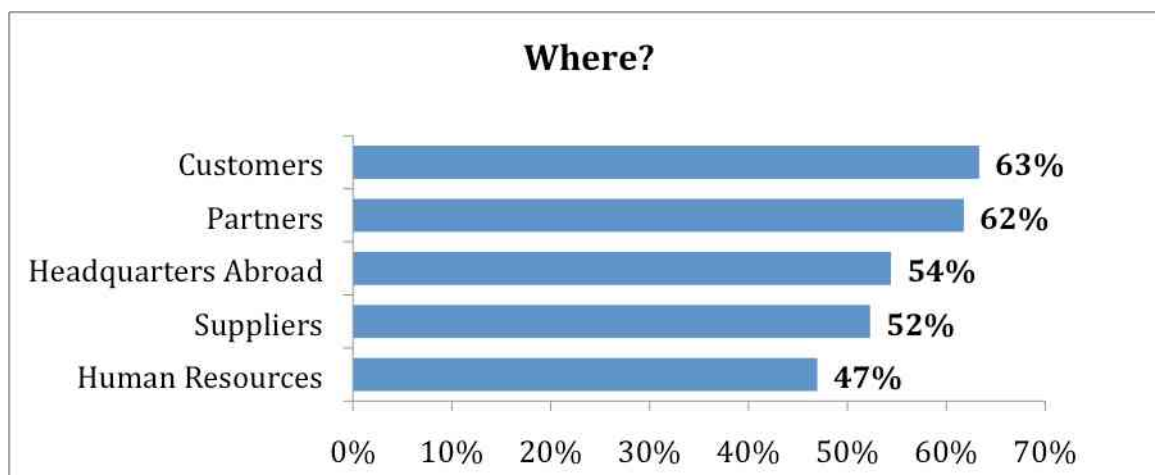
Companies declaring that language skills are not important can be found in all size categories, including large firms (11 responses), and in all sectors, including BROs (1 response from a BRO in Bologna), but their numbers are rather limited: 2 in the Agro-industries, 8 in the Manufacturing sector, 4 in the retail sector, 7 in the ICT sector and surprisingly 16 in the services sector. Filtering those negative responses against the question whether they have in-house language skills as it results that 6 of them have native

foreign language speakers in-house, 17 have staff with language skills and 17 have staff trained for languages.

16 out of these 51 companies declare to have only occasional language needs, while for 4 of them language needs would be recurrent and for 5 even continuous.

However, these 51 companies when asked whether languages could possibly become relevant for their operation or competitiveness, 41% say yes (14% of the 173 companies in the Agro-industries and Manufacturing sector, 47% of those 175 in the Retail, Distribution and Services sector and 57% of those 98 in the ICT and BROs).

Coming back to the 484 enterprises in the CELAN sample recognising the importance of language skills, they ranked where foreign languages were needed:



Businesses were asked to indicate in what kind of relations language skills were most needed, scoring from 1 to 5 in increasing order of importance.

The above graph shows the percentage of responses having reached the highest score (5).

Customers rule for businesses. They are the leading reason for the uptake of foreign languages. Indeed, it is their needs that companies have to understand fully and it is them to whom all attentions are devoted. Businessmen thus consider addressing customers in their own language as key to their competitiveness. Communicating with customers in a language that they command is a clear factor for generating trust. This explains also why language skills rank 4th in the relations that businesses maintain with suppliers. They are expected to satisfy their needs and to be convinced by the advantages of the products or services they are offering.

The relations with business partners rank 2nd with a similar score than the one for customers. Also this score makes sense. Business partners share the same interests and the same objectives and these are best met in a

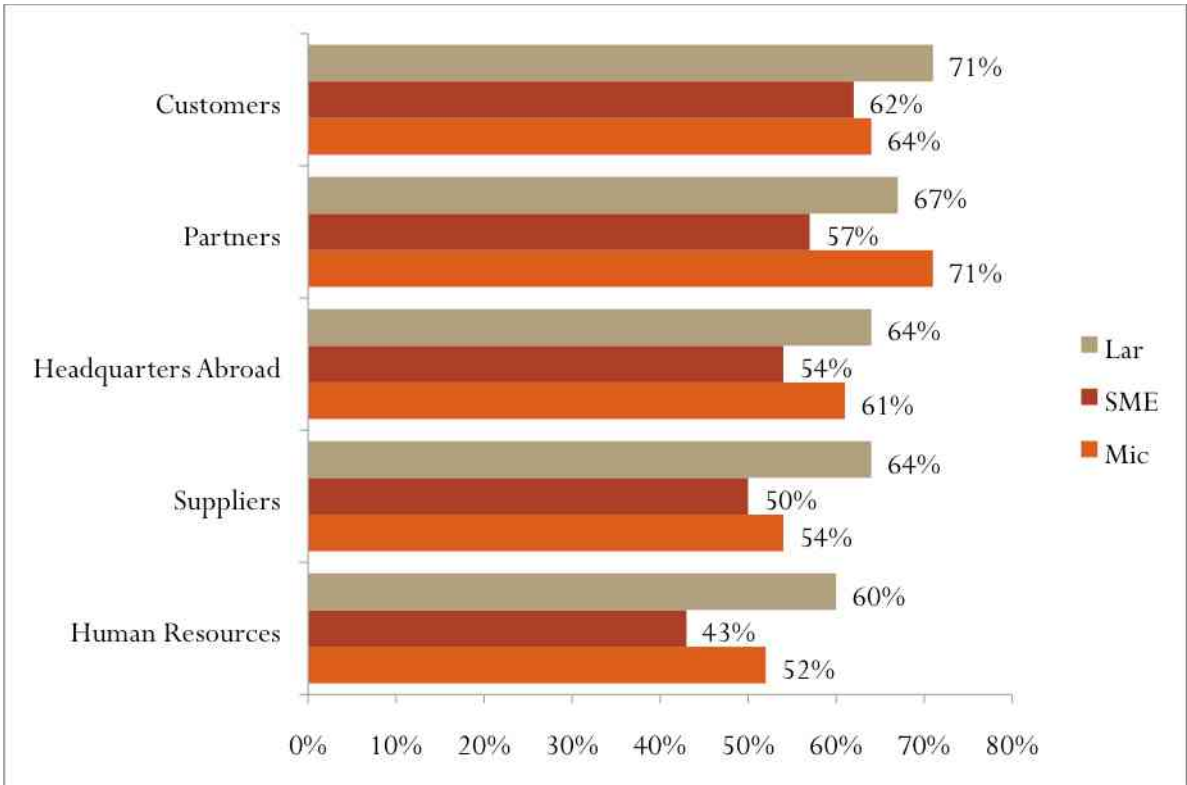
fluid communication. This requires logically the capacity to communicate easily.

54% of respondents gave also the highest score to language skills for maintaining relations with their headquarters abroad. The relatively high proportion of enterprises having indicated to be part of a larger foreign group (34%) explains this need.

Suppliers rank 4th as drivers for the uptake of foreign languages in the European business community. We will see that this rank varies according to the business sector.

The relations with the human resources appear in this consultation at the bottom of the ranking although they are rated most important for 47% of the respondents. This does not mean that human resources are not key to the competitiveness of businesses. However, employees are supposed to understand the instructions in the chain of command as an essential condition for employment. Recruitment of human resources is usually done at local level where the selection of personnel is done according to the specific needs of the service and where language skills are, as appropriate, a fundamental condition. This reduces the need for companies to adapt their language to the constitution of their workforce. The business culture imposes the standard. Language skills for communicating with human resources is, however, becoming increasingly important with the development of relative shortages of skilled labour in certain areas and of immigration.

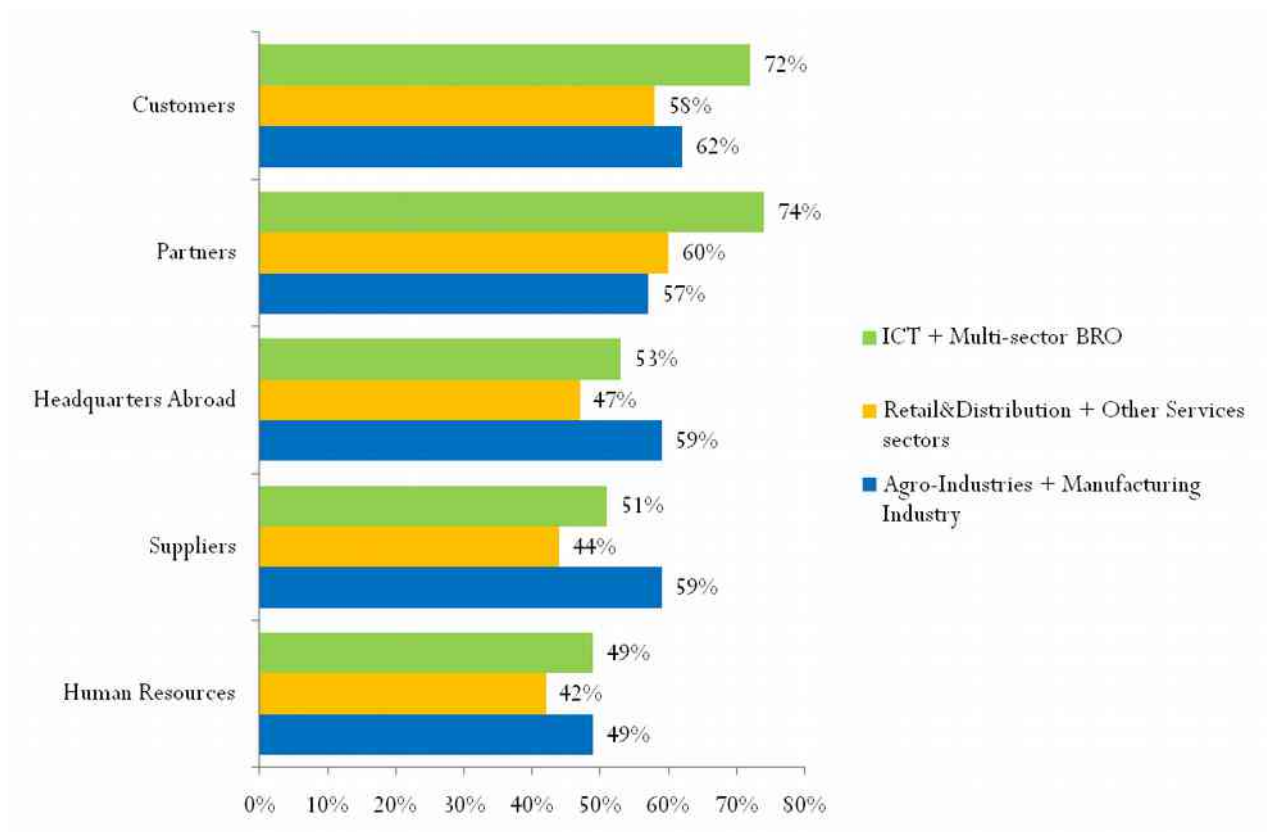
This ranking of importance of language skills for businesses does not vary significantly for the different size categories of companies with some interesting exceptions:



For large companies language skills are sensibly more important across all types of relations than the average with a particular emphasis on suppliers and human resources.

For micro enterprises, however, the highest rank is devoted to language skills in relations with business partners. The inversion of ranks between customers and partners in this size category of businesses may be due to the fact that micro enterprises attribute a greater importance to their strategic development in terms of associates rather than customer base, because they are confident that the customer is convinced of the quality of their products and services; they don't sell, their products are bought.

This can be confirmed through the sector analysis of responses. Indeed, it is the Retail & Distribution sector (+ other services) where the same inversion can be observed.



The graph above shows also that in the ICT sector – more than in any other sector – languages are important in the communication with customers and partners where they reach 72 and 74% respectively, considerably higher than the retail or agricultural/manufacturing sector.

With regard to communication with headquarters, suppliers and Human Resources, the percentage is more than 20% less. The reason for this lower level of importance may reside in less need, but it might also be a reflection of the internal structure of the business: micro or small enterprises do not have headquarters or Human Resource departments; hence there is no need for communication.

In the Agro-industries and Manufacturing sectors language skills are significantly more important in the relations with suppliers, having regard to the importance of inputs, such as raw materials, which have experienced a certain rarefaction with increasing difficulties for accessing them in an increasing number of countries.

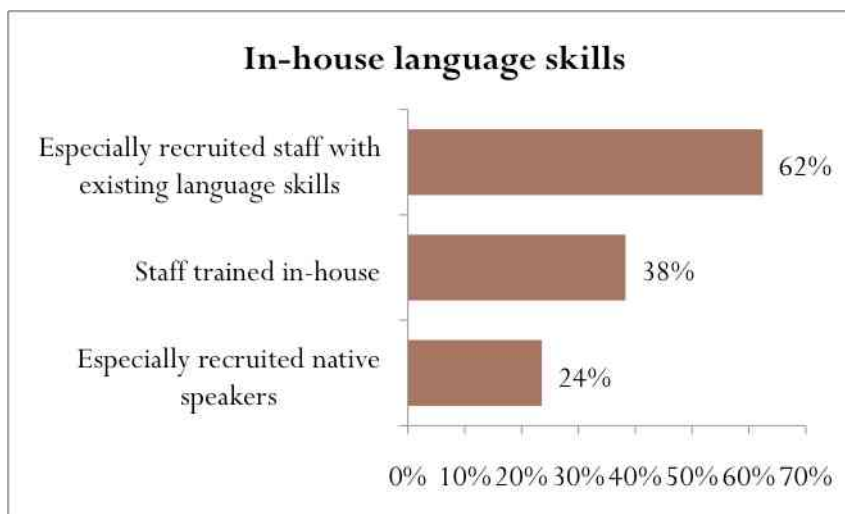
Question: Do you have *in-house language skills*?

The question about the presence of in-house language skills has been answered by all consulted businesses, even by 11 of those 28 having expressed in a previous question that they don't consider languages as an essential factor for their competitiveness on the market and that it was unlikely to change in a near future. Of these 11 businesses one agro-business from Malta indicates to have an English native speaker, 2 micro

enterprises in an undefined sector from the Czech Republic and from South East England in UK declared to have recruited personnel with knowledge of Spanish and Swedish, Maltese, Italian and French respectively. This is also the case of an Irish BRO. Further 5 service sector enterprises and one UK BRO (4 from Malta, 1 from Romania) indicate that they are training in-house their personnel on foreign languages.

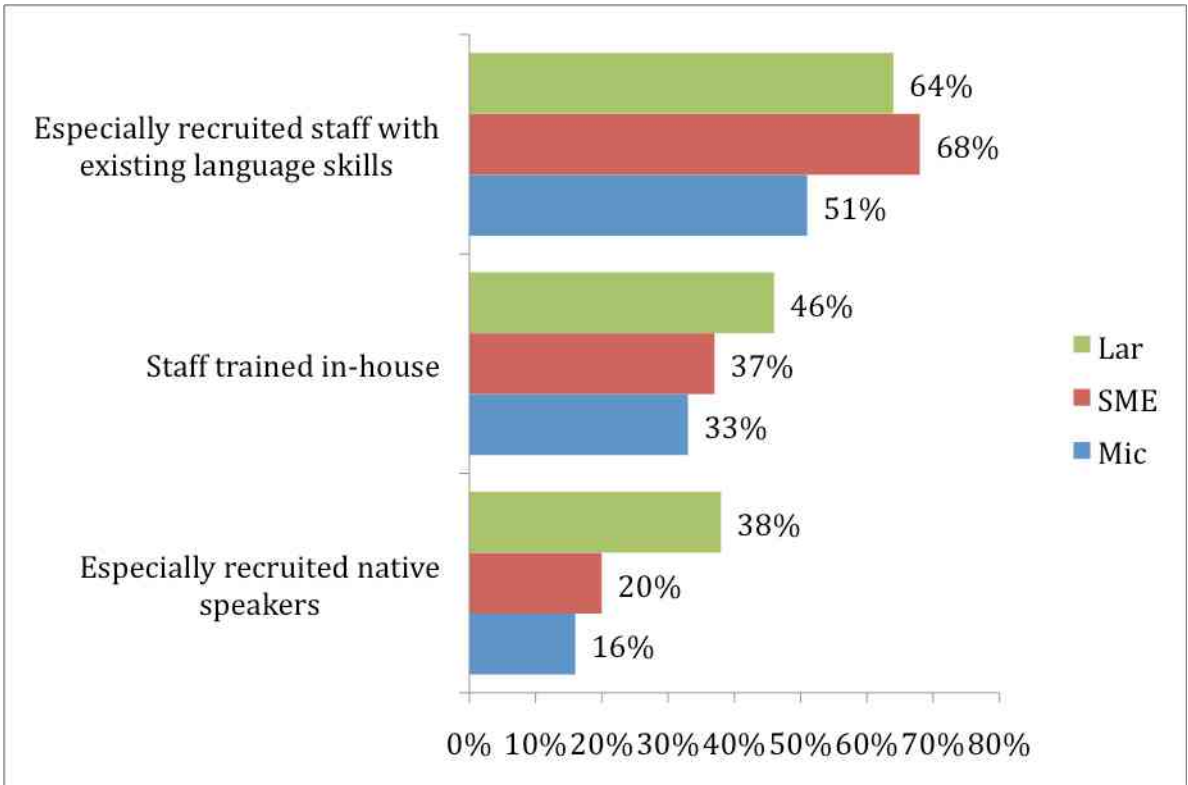
The availability of foreign language skills is thus considered overall useful for any business.

The following graph brings the various ways in which businesses have acquired these foreign language skills:

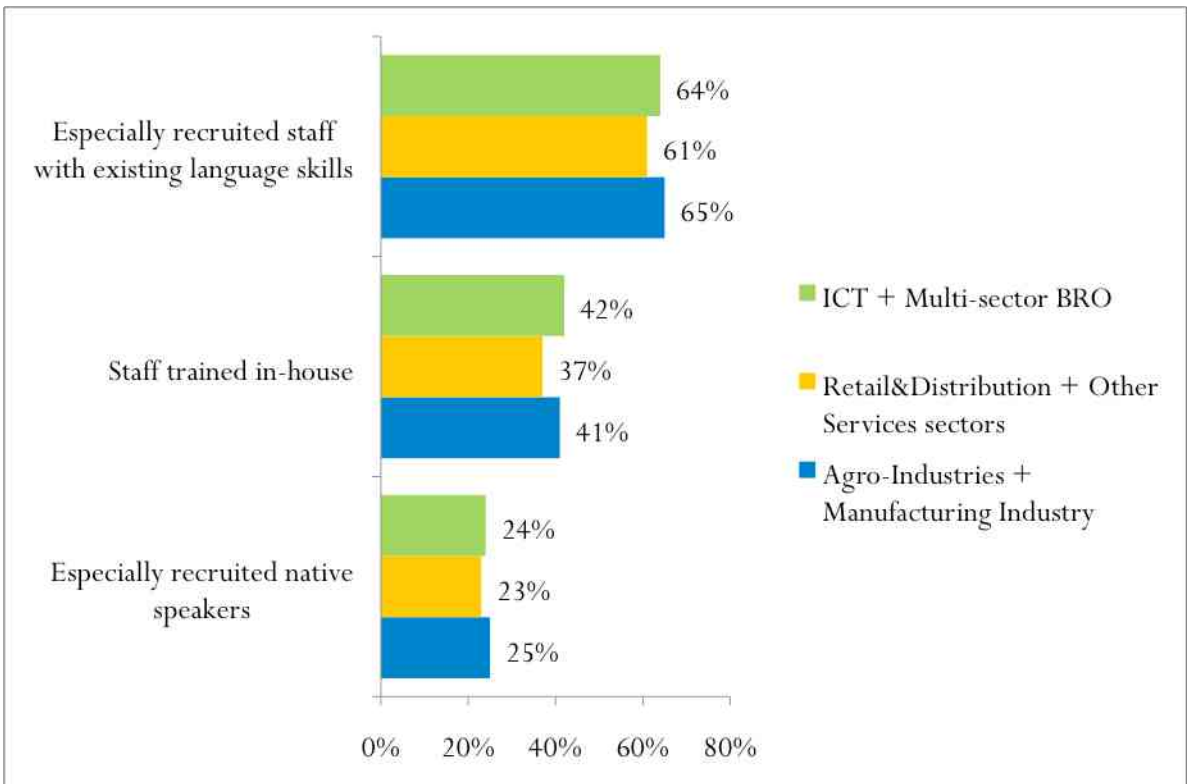


The preferred route for businesses gaining language competences is through recruitment (86%), both of candidates having existing foreign language skills (62%) or of native speakers (24%). Recruitment is followed by in-house training (38%).

This pattern can be observed throughout the different business size categories and sectors.



SMEs tend to privilege somewhat the recruitment of staff with existing language skills, large enterprises tend to build slightly more on their in-house language training offer and the recruitment of foreign native speakers. The following graph brings the picture at sector level:



The question has been answered very similarly in all three sectors. 64% of the ICT sector employs staff with existing language skills (compared to 61% in the retail segment, and 65% in the agriculture/manufacturing segment). With regard to in-house trained staff, ICT reports 42% (37:41 respectively in the other segments) and 24% in recruitment of native speaker (23:25 respectively the others).

It can be concluded that the ICT sector tends to employ staff that has as an added value the language skills the respective work needs, but is less inclined to provide training courses for their employees and even less so, recruit native speakers. One reason for the low native speaker rate might lay in the lack of native speakers due to lack of mobility on the European labour market. This may impact the availability of native speakers at the national labour market, hence the option is less usable in a sector where micro-companies and SMEs prevail.

Finally, 115 of the respondents to this question declare to have an established language development policy.

2.2. Specific questions on languages for business

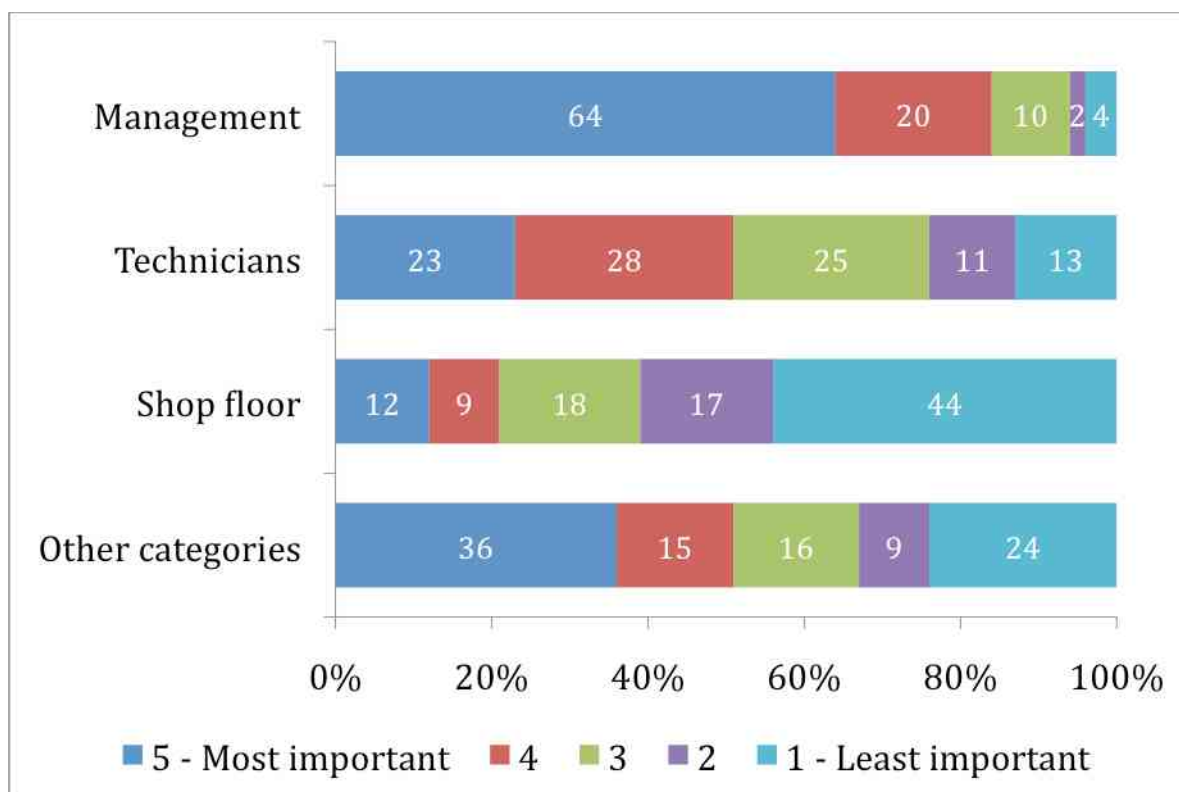
Question: When recruiting staff, how important are language skills?

The quickest way to acquire foreign language skills for any business is recruitment. As we have seen above this is the policy adopted by 86% of the consulted companies.

With this question CELAN thought that it would be interesting to see at what level of the command chain in businesses languages were a decisive factor for employment.

Answers to this question were related to the type of staff and divided into 4 possible staff types: Management, technician, shop floor and "other". Moreover, respondents were invited to rate the level of importance in the various categories.

The following graph brings the result:



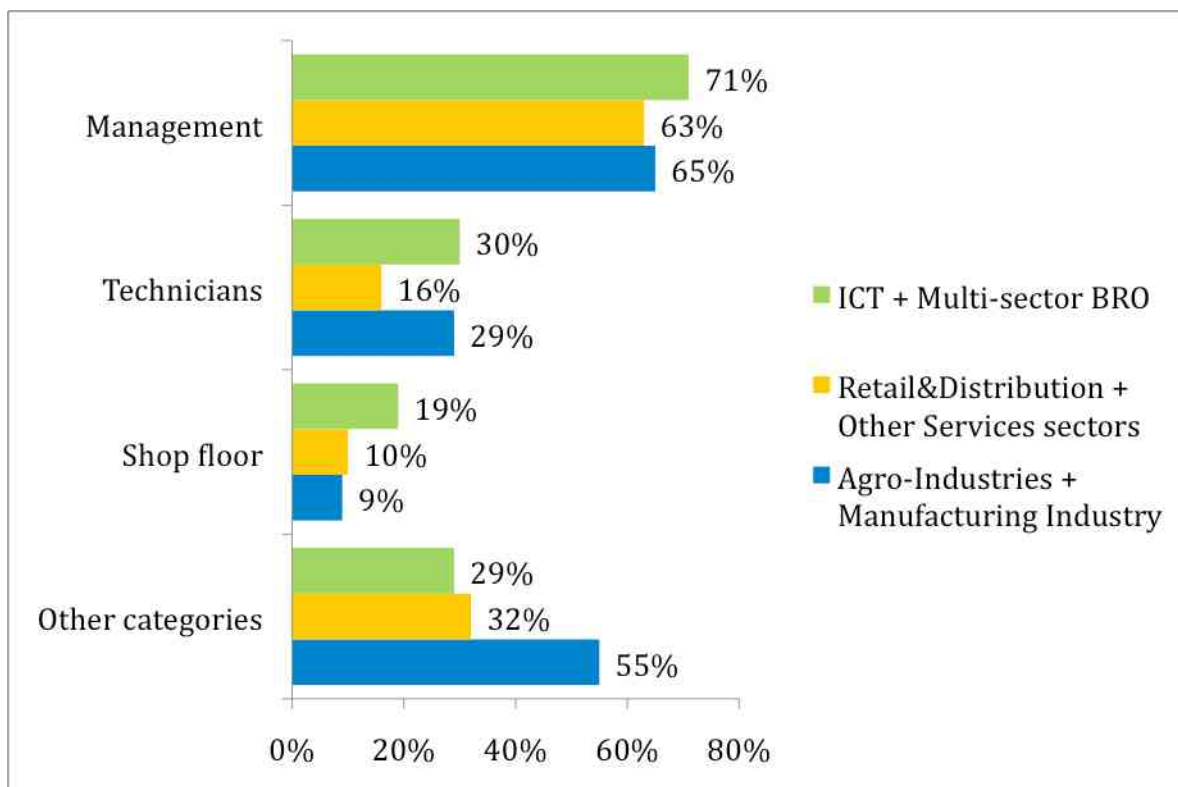
Foreign language skills don't play any significant role at the shop floor level when it comes to recruitment. The 12% of respondents scoring 5 at this option can be found mainly in "old" EU member States confronted with a relatively higher degree of immigration. No particular pattern could be observed in relation to the size of businesses.

As regards the management level of companies, it seems that there remain few enterprises that would recruit top staff without existing language skills. Languages at that level have become a career condition. This is also visible through another question in the CELAN consultation, namely the one concerning usefulness of language services. 41% of Businesses in the CELAN sample consider it very useful to most useful that job seekers arrive on the labour market with prior foreign language skills. The CELAN enquiry provides also some hints into the reason why managers need to have language skills. The CELAN question regarding the specific business activities where languages are required ranks first "Attending business meetings" with a mean score of 4.34/5 and 65% of all consulted and second "Maintaining international relations/travelling abroad" with a mean score of 4.21/5 and 59% of responses.

The analysis of the responses concerning "Technicians", i.e. the middle management level, is more nuanced. Half of the sample considers language skills important at the moment of recruitment of middle management with a mean score of 3.35/5. The other half seems to attribute more importance to other skills when recruiting technicians, possibly to "vertical" skills or skills directly related to the technical activity to be performed.

This is however somewhat in contrast to the responses given to the question regarding the specific business activities where languages are useful. There businesses consider language skills quite useful in a number of activities that are performed by technicians, such as attending trade fairs/conferences/congresses (mean score 3.39/5), retrieving and using business/technical/market intelligence (mean score 3.86/5), preparing internal operational procedures (mean score 3.34/5) or installing and maintaining company products abroad (mean score 2.96/5).

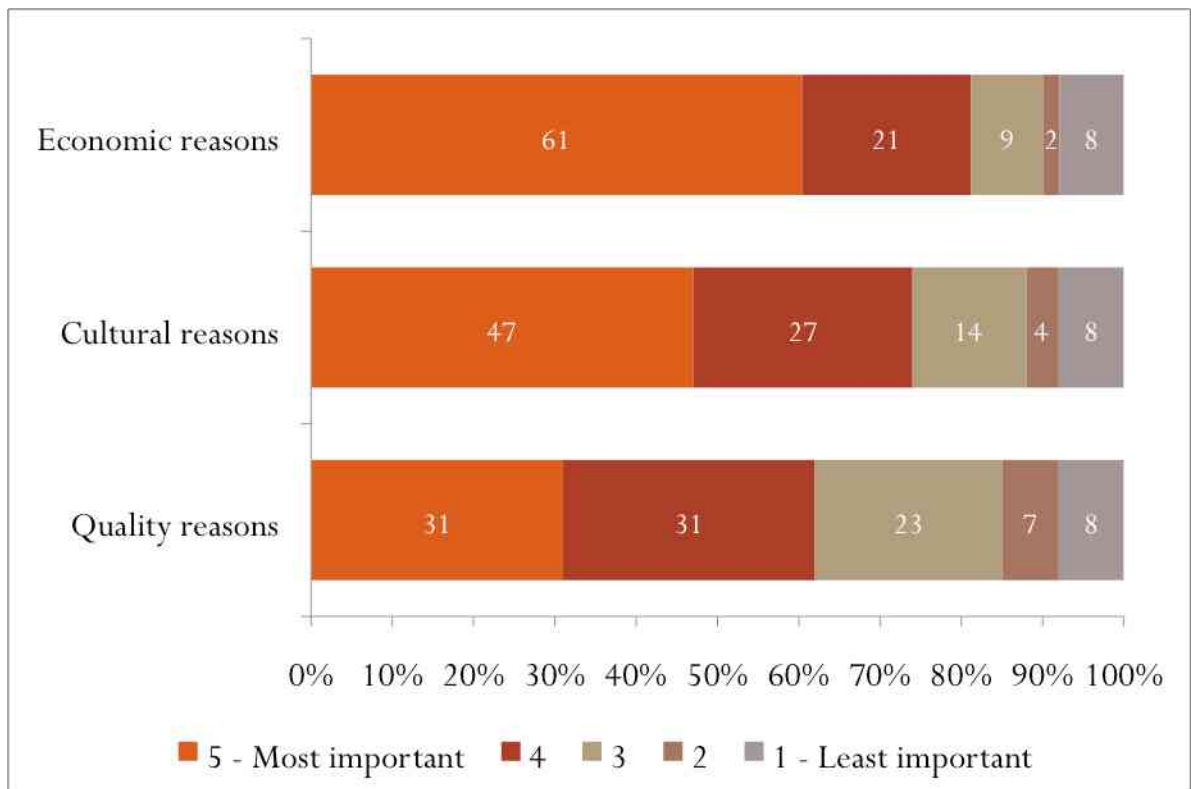
A look at the sector evaluation indicates indeed that much more importance to language skills for the recruitment of technicians is given by the ICT sector (30%) and the Agro-Industries/Manufacturing sector (29%) compared to the Retail&Distribution/other services sector (16%). Indeed, the middle management in the latter sector is likely to be in general less exposed to situations where an interaction with people speaking foreign languages occurs.



In the sector analysis it is also important to highlight that the ICT sector scored highest at management level where languages are important in 71% of all answers. Only 30% of ICT technicians "need" languages and even less at shop floor level, i.e. 19%. Again, there might be a caveat, as some very small or micro enterprises might not have a shop floor level, hence they accorded less importance to it. Overall, the ICT sector is highest in languages skills at management level, technician and shop floor level compared to the other 2 sectors.

Question: What *motivates the use of languages* in your business?

The underlying reason why businesses become multilingual is worthwhile exploring. CELAN wanted to identify the driving values behind the choice of a business for being able to operate in various languages or, in other words, in languages other than the founding language. The CELAN consultation was interested in identifying other drivers than the economic one behind this strategic choice. Possible answers were: economic, cultural and quality reasons.



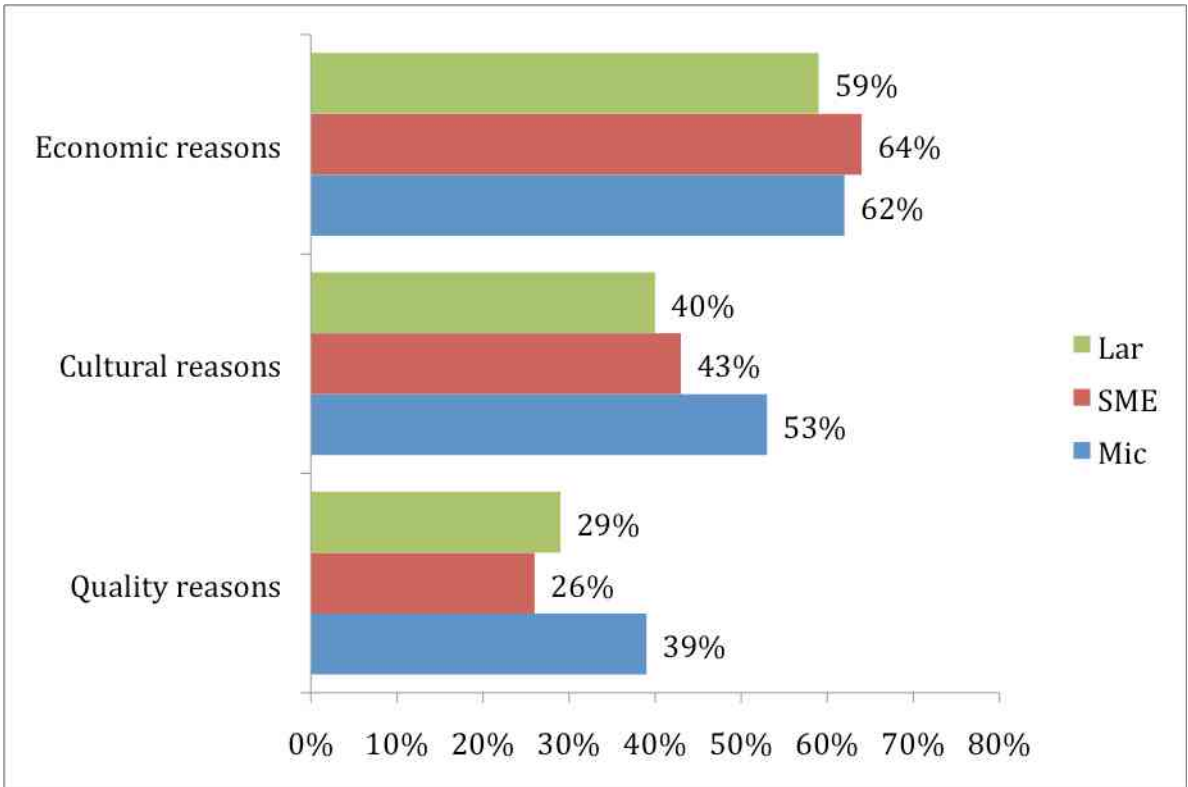
The responses given across sectors and size categories are quite interesting as, besides giving to the economic reason its obvious first rank (mean score 4.2/5), it evidences that it is not the only reason for the “multilingual option”. Cultural and quality reasons play also a significant role with mean scores of 3.35/5 and 2.5/5 respectively.

A company’s business culture can be also expressed through its multilingualism. Indeed, the command of foreign languages is an important factor for the image of a company. It denotes openness, spirit of adventure (risk) and capacity to compete on the same level as other companies in other countries.

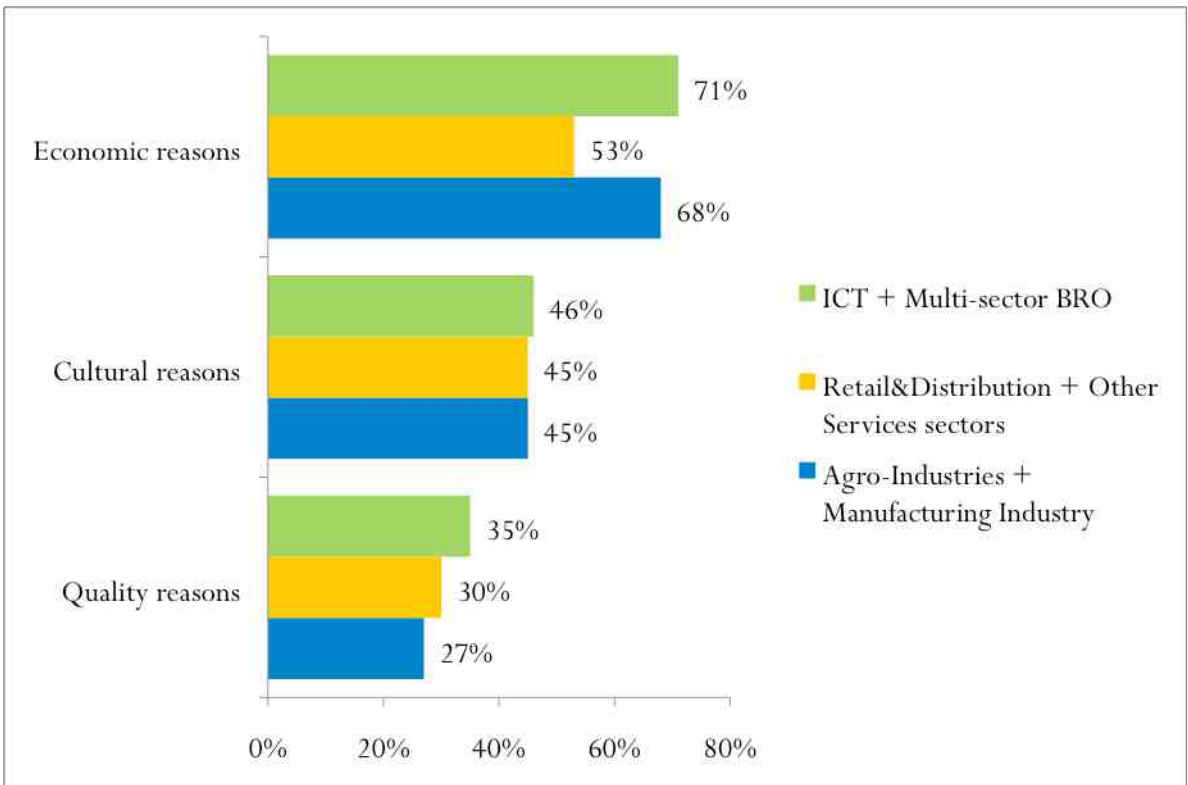
For 74% of respondents the cultural motivation for multilingualism has been quoted as very important to most important.

Also quality reasons play a significant role in business as a motivating factor for the use of foreign languages. 62% of respondents understand that it is the most important or a very important reason for their strategic choice.

Quality relates to products and processes and these require language for coming to light. The use of foreign languages supports their rise in quality. It denotes the capacity of business to compare and improve.



Micro enterprises have clearly understood more than other size categories the importance of the “cultural factor” and the “quality factor” as it can be observed in the above graph.



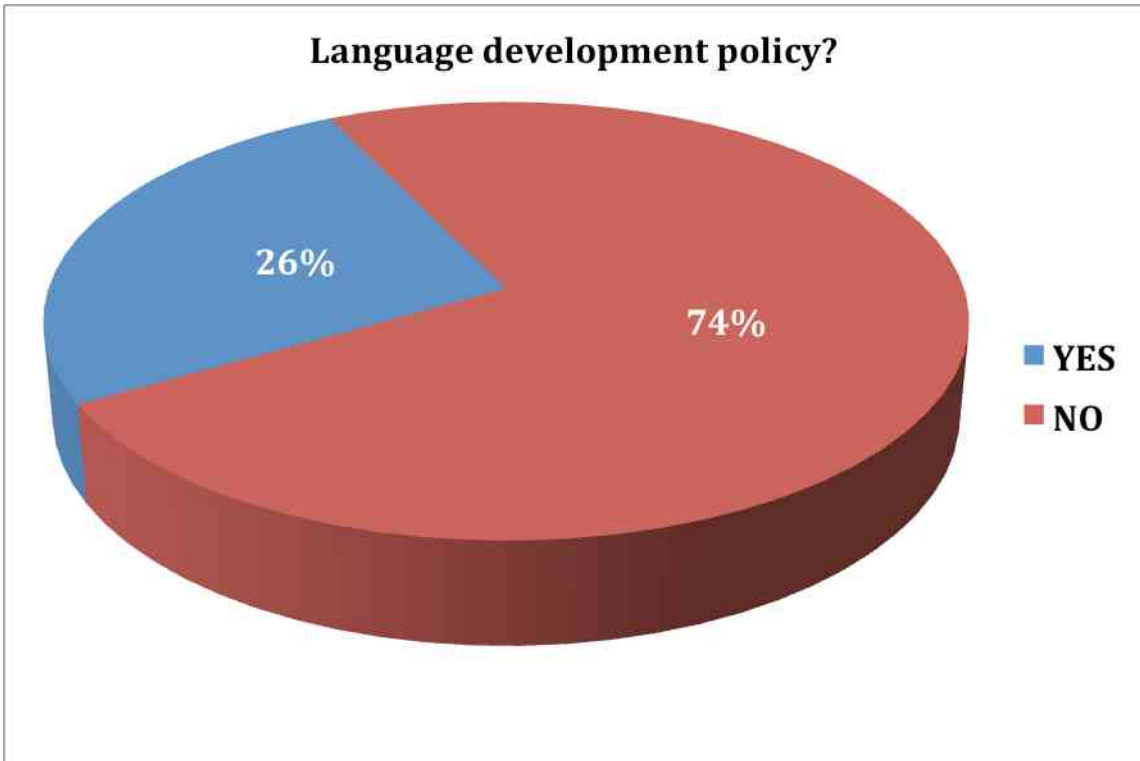
The sectoral analysis brings also some interesting insight into the question regarding motivation. In the ICT sector, economic values are particularly evident having regard to the intense competition of companies on the market. 71% put the economic value first (which is considerably higher than, as comparison, the retail sector where it is only 53%). In the ICT sector, this question showed some interesting differences with regard to the company size. While the economic motivation scored similar among all company sizes, the quality scored highest in micro enterprises (39%; compared with 29% in large enterprises and 26 in SMEs). This is in correlation with the ICT sector response, where 35% put quality as motivation and where there are a relatively high number of micro enterprises.

The cultural motivation showed no difference to other sectors (46:45:45%) while 53% of micro enterprises are motivated to use languages for cultural reasons (40% large, 43 % SMEs).

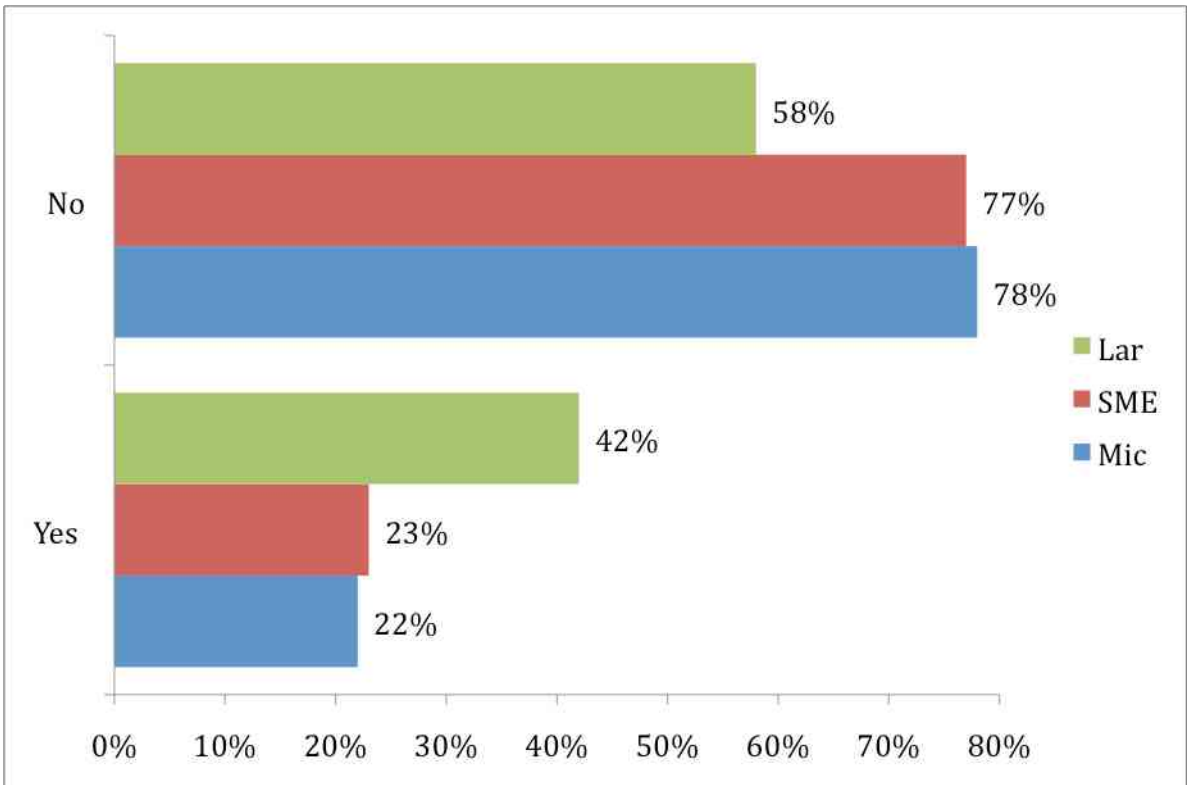
In the Agro-industries/Manufacturing sector motivations are similar as in the ICT/BROs sector with the exception of the "quality" reason. Apparently languages are not perceived as an important driver for improved products or processes in the CELAN sample.

Question: Does your company have a formal language development policy?

The question if the company has a formal ***language development policy*** in place showed that this is a weak point in businesses. Although recognising the importance of multilingualism and identifying with a great deal of precision the business activities where languages are needed, 74% of the CELAN respondents "confess" to be orphan of a formal language development policy.



The analysis on business size reveal that even large enterprises lack to a certain extent a formal language development policy. 58% of all large companies in the CELAN sample recognise this weakness.



Large enterprises, however, are also those leading in the integration of the language factor in their business strategies as can be seen in the graph above.

The sectoral analysis, however, indicates that it is in the Agro-industries /Manufacturing sector where to find the leaders in this area. Indeed, 32% claim to have a formal language development policy compared to 26% in the Retail&Distribution/other services sector and 19% in the ICT/BROs sector.

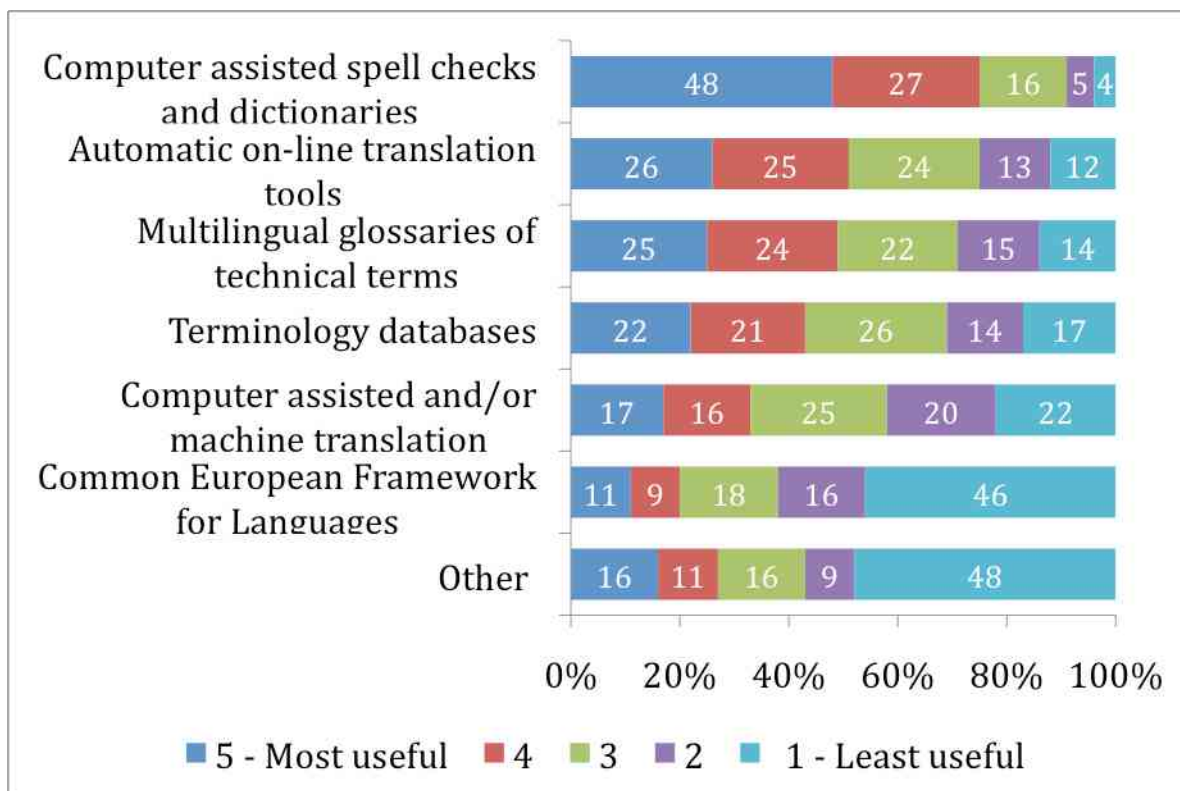
Clearly this is not an issue for the ICT sector. 81% of ICT organisations answered no, the highest rate of all sectors. Across all questionnaires, only 26% have a language development policy in place, with a 42% highest in large companies.

It is surprising that, with a relatively high sensibility towards languages for business in the ICT sector (see above), the development of a language policy does not seem to be a priority. It is at that level that a potential language strategy and its benefits should be promoted, in order to see whether an improvement of the business performance could be achieved (as indicated by several recent reports).

Question: How useful are the following language tools for your business?

CELAN wanted to know the current use of a number of commonly available language tools and their relative importance in the eyes of business. The language tools proposed were predominantly computer-based, but not only; one could find computer assisted spell checks and dictionaries, and automatic translation tools but also glossaries and the Common European Framework for Languages. Finally an "other" category allowed respondents to indicate whether the proposed list was exhaustive.

The responses could rate the usefulness from 1 (least important) to 5 (most important).



Nearly all businesses consulted responded that question (up to 470 responses for the most popular language tool) but not all options proposed were actually rated (only 391 rated CEFL) on their usefulness indicating a certain lack of interest for certain language tools or a lack of knowledge of their existence and value.

The “other” category received only 110 ratings out of a potential total base of 470 meaning that the main language tools or business had been addressed and that other more sophisticated or specialised possible tools only appeal to 16% of these 110 businesses.

The little attention garnered by CEFL (391 businesses rated this option) and the low score achieved (mean score 2,24/5) evidences the general lack of awareness of this tool.

On the other end, the most popular language tool is clearly the computer assisted spell check/dictionary. 48% of 470 businesses consider it most useful for their business. This tool that has become a standard feature in today’s word processing programmes is clearly welcome by business and denotes a high degree of computer literacy of European business as much as the need for assurances in the correct spelling and expressions used in own and foreign languages.

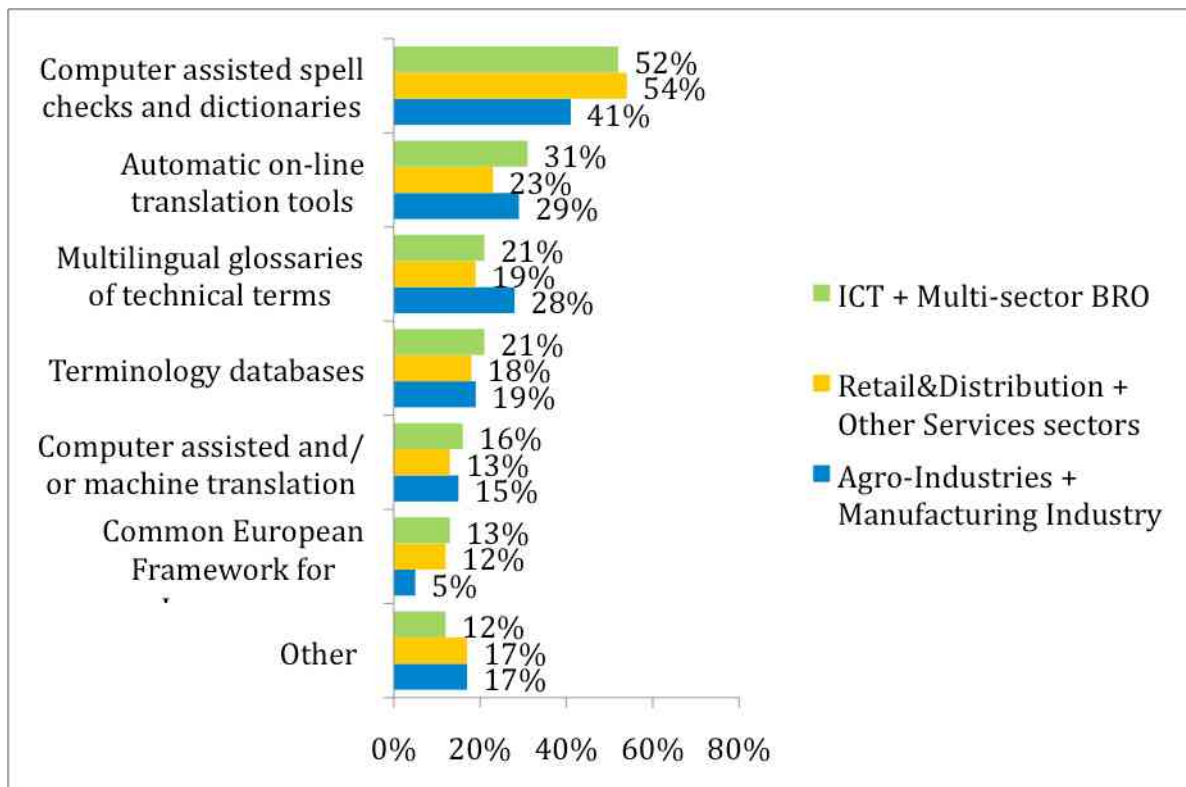
Now, looking at the other options proposed, notably translation tools and technical vocabulary, the response of business was more balanced.

Generic translation tools were proposed either as an on-line feature (Internet based) or as a computer-based feature. The former scored

apparently much better than the latter with a mean score of 3,37/5 compared to 2,87/5. Internet based translation tools, although still less reliable, are evidently more practical and appeal to a much wider user base than computer-based tools. Costs may also play a role.

Terminology tools, in databases or multilingual glossaries, are rated most useful by 22-25% of some 450 businesses and if one takes also the second best score option (very useful) the rating reaches almost half of the consulted indicating the importance of the command of technical languages across sectors and across business size categories.

A look at the sectoral analysis provides additional insight in this area:



This graph confirms the overall findings for the various sectors with slight differences.

For the ICT sector with the exception of the first tool and "other", they lay slightly higher than the other two sectors, but do not differ significantly.

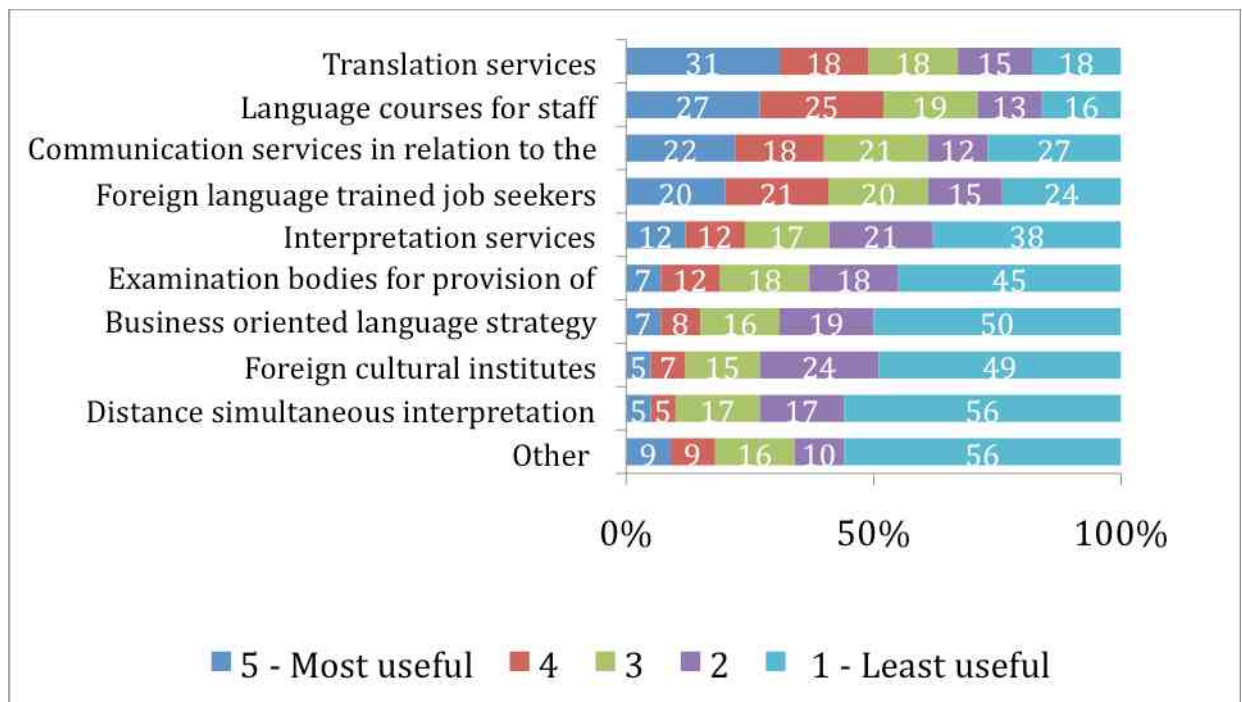
For the Retail&Distribution + Other Services sector ratings lay slightly lower than the other two sectors with the exception of the computer assisted spell checks/dictionaries considered most useful for 54% of the sectors enterprises consulted.

For the Agro-industries and Manufacturing Industry the most striking feature is the relative importance given to technical language tools compared to the other two sectors.

It is obvious from these answers that mainstream tools that are easily available and/or available for free are most used. More sophisticated technologies like Machine translation are still underused, probably because of lack of information how these tools can support the business processes.

Question: How useful are the following language services to your business?

CELAN asked the same question regarding language services. The response rate was quite similar with the "other" category getting only 110 responses and a mean score of 2,05/5. All other options were rated by 423 to 463 businesses.



It is interesting to note that the highest percentage of the maximum score is not higher than 34%. Language services seem thus to appeal much less to business than language tools.

Translation services (mean score 3,31/5) rank first in the list receiving the highest score by 31% of 462 consulted companies. An additional 18% considers them very useful. Written understanding contrast with spoken understanding that is considered most useful by only 12% and very useful by an additional 12%. And distant simultaneous interpretation garners only 10% of usefulness votes, the lowest score of all proposed language services.

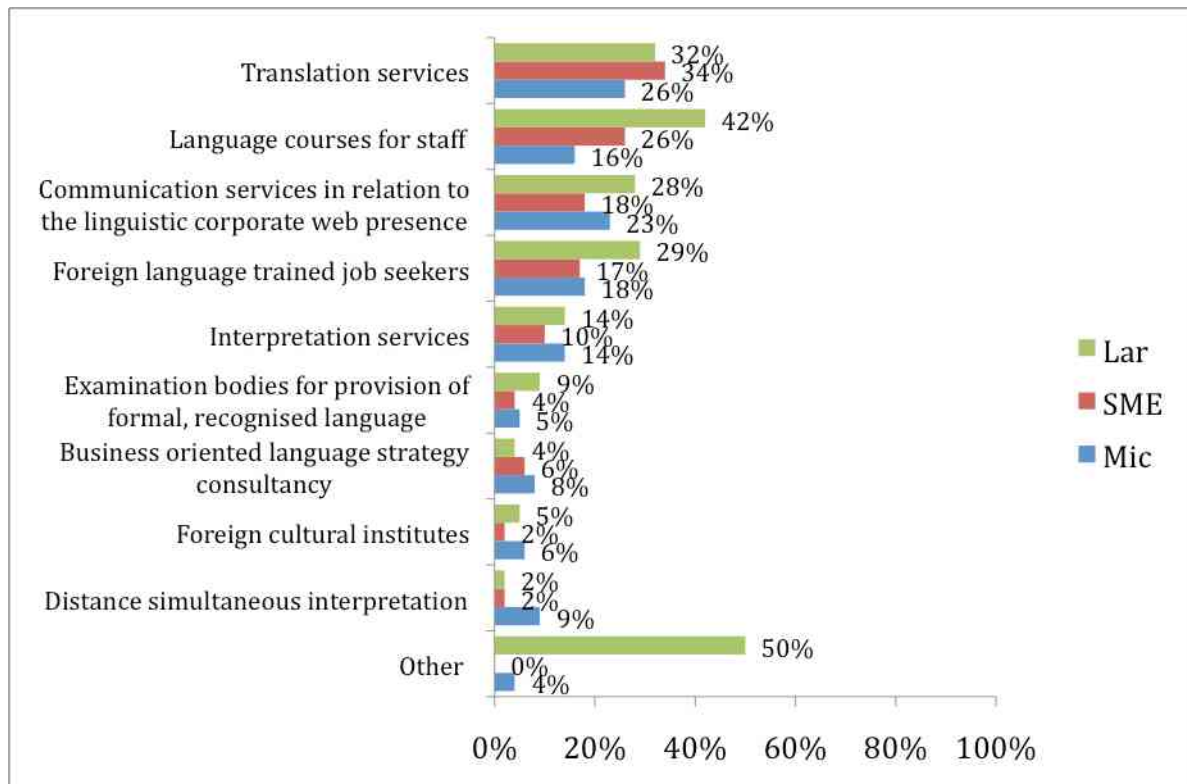
Language courses for staff achieved the highest mean score with 3,33/5 and if one sums the two highest ratings, this service would appear as the clear winner of all language services listed.

Communication services in relation to the linguistic corporate web presence holds the third rank in terms of usefulness among all services proposed in the CELAN survey. All other suggested services such as those proposed by examination bodies for the provision of formal, recognised language qualifications, business oriented language strategy consultancy or foreign cultural institutes achieve less than 20% of satisfaction by business.

These findings reveal on the one hand that business is in general less keen to resort to external language services than to in-house language tools, possibly for cost reasons, and on the other hand, that when considering recourse to external services they are highly interested in a directly exploitable and lasting result.

However, interpretation services and language services offered by foreign cultural institutes may have been too severely sanctioned in this survey. The low rating of the latter is possibly due to the fact that these institutions may not target particularly businesses in their language service offer, rather individuals, and the former because these services are generally welcome when offered, notably in international meetings, congresses and conferences and possibly also because the language selection provided is often reduced to the typical vehicular languages, disregarding other language needs.

The analysis by business size categories reveals interesting nuances.



The result that strikes first is the indication by large enterprises that the CELAN survey may not have listed certain language services that are deemed most useful by this size category. This result must be, however,

put in perspective, as it corresponds only to the views of 3 enterprises. All other 125 large enterprises did either not rate this option or rated this option as irrelevant (3). Respondents, however, did not reveal what these other services could possibly be. Only one large French company gave some further explanations indicating that its overall rating was function of the fact that it has an in-house translation department.

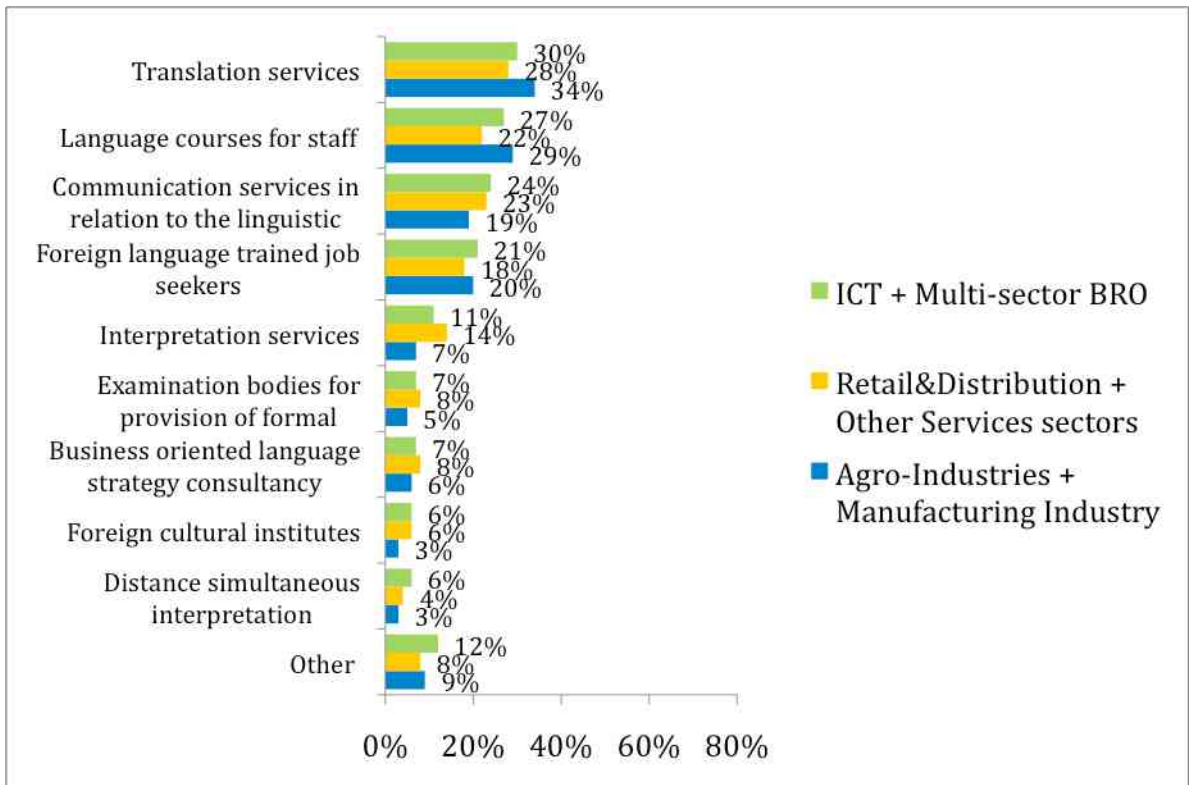
Large enterprises draw their language competences from their personnel. 42% declare using mainly language courses and 29% drawing language skilled people from the labour market. Their multilingual web-presence is also considered important as 28% of respondents rated communication services in this area as most useful.

Large enterprises together with Micro enterprises are those size categories that comparatively use more external interpretation services (14% compared to 10% by SMEs), where 9% of Micro enterprises tend to find most useful also Distance interpretation services while this option appeals only to 2% of other size categories.

The graph reveals that SMEs are particularly users of translation services compared to their larger and smaller counterparts. In all other proposed services SMEs are comparatively behind either larger or smaller counterparts revealing that there is a market potential provided that the services are tailored to the specific needs of this size category. Language courses are found most useful by 26% compared to 42% by large enterprises; Communication services related to their multilingual web presence are considered most useful by 18% compared to 28% of large companies and 23% of micro enterprises; Foreign language trained job seekers are most useful to 17% of SMEs compared to 29% of large companies and 18% of micro enterprises; Interpretation services are found most useful by 10% of SMEs while it is to 14% of large and micro enterprises;...

For micro enterprises, language courses for their staff seems not too important while this business size category finds comparatively most useful business oriented language strategy consultancy services (8% of respondents), services offered by foreign cultural institutes (6% of respondents) and distance simultaneous interpretation (9% of respondents). Other size categories rated these options sensibly less as the most useful language services.

The sectoral analysis reveals that Agro-businesses and Industry lead in the satisfactory use of translation services and language courses, while Retail&Distribution + Other Services are comparatively more satisfied with interpretation services, examination bodies for formal qualifications and business oriented language strategy consultancies.



For the ICT sector, the highest rate is also the translation sector with 30%, followed by languages courses for staff with 27%. Here it is interesting to note that the bigger the enterprise, the more importance have language courses (42% in large enterprises as opposed to 26% in SMEs and 16 in micro-enterprises).

Other data show that languages courses are important for Business representative organisations (BROs) with 36% as opposed to enterprises with 23%. It is obvious that larger conglomerates (be it enterprises or BROs) attach a stronger importance to language learning for their staff. Another reason is surely that they can afford it easier in terms of manpower and financial resources than small or micro-enterprises.

Communication services in relation to linguistic corporate web services play in 24% of responses a role in the ICT sector, foreign language trained job seekers 28% - which correlates to the answers to the question regarding in-house language skills (see above).

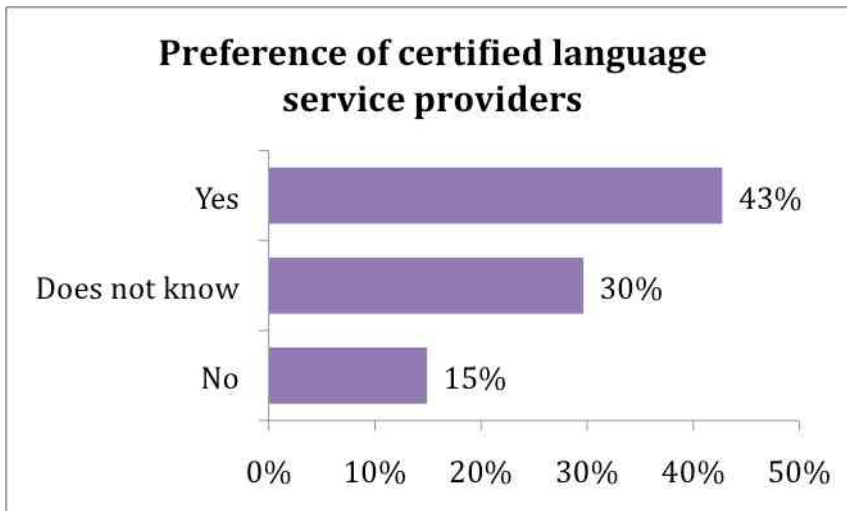
Only 11% of the ICT sector uses Interpretation services, and 7% use services of Examination bodies for formal recognised language qualification. Again, 7% use

Business oriented language strategy consultancy, and 6% go to Foreign cultural institutes. Another 6% use distance simultaneous interpretation and 12% rely on "other" services. It is interesting to note that 50% of large enterprises from all sectors tick "other" services, but 0% of SMEs.

Overall, it can be said that language services focus on immediate services for the business (translation) or its staff (courses) while other offers are used in a negligible frequency only.

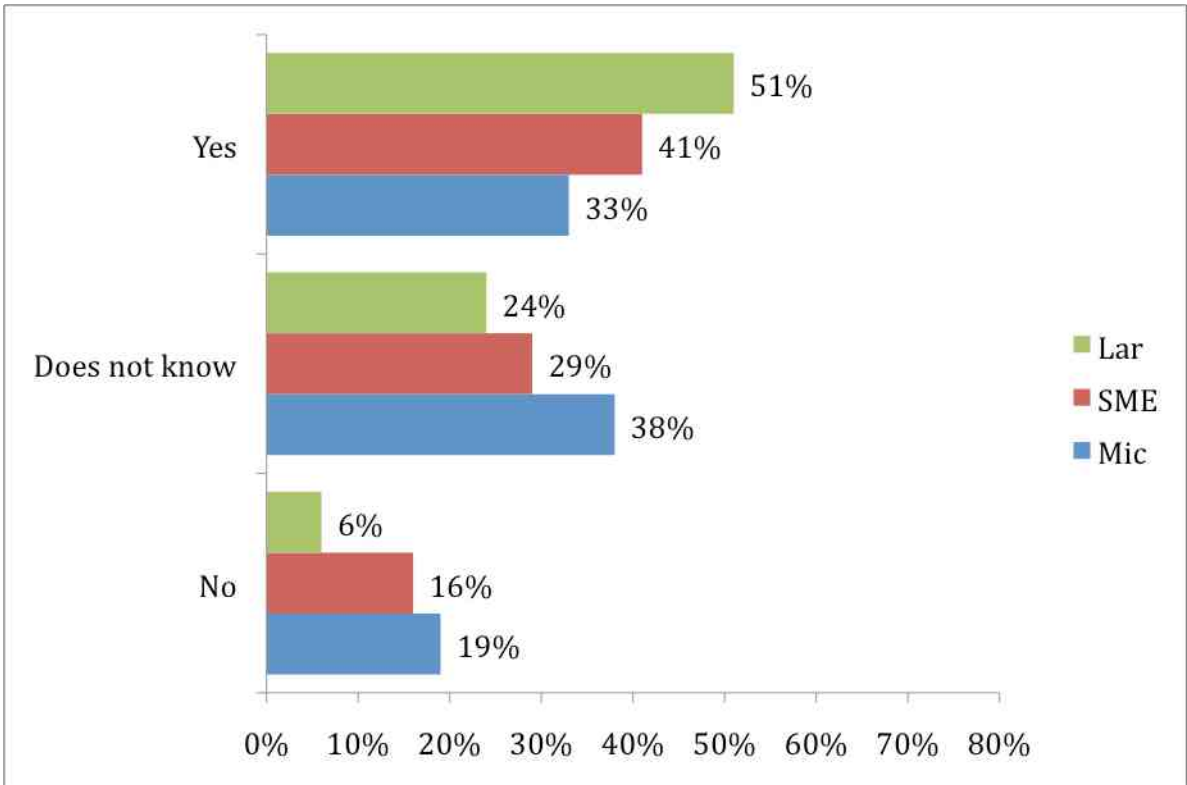
Question: Do you prefer certified language service providers?

When asked for the preference of **certified language service providers**, 543 businesses responded and the overall answer across all sectors was in 43% yes.



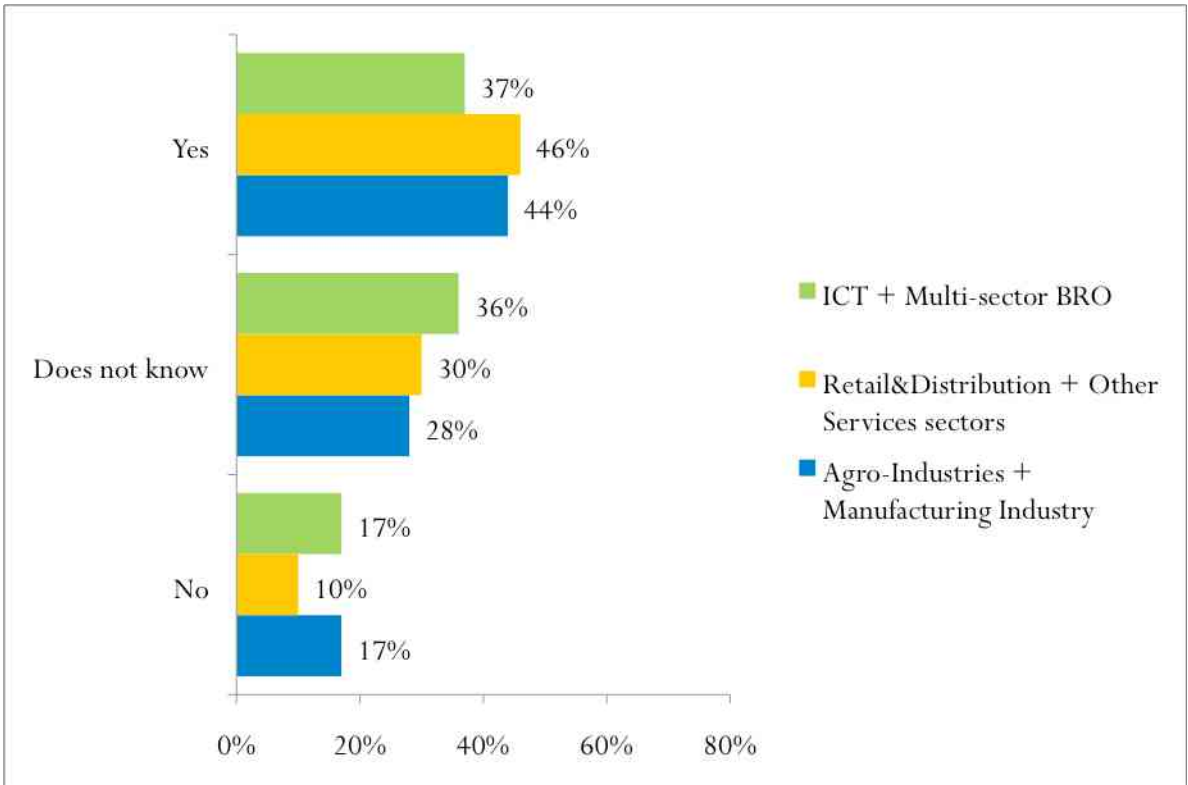
Certification of language service providers is relatively new and yet it has gained a certain level of recognition among business. Still there is, however, room for improvement, as every second business needs to understand the advantages of certification.

These advantages are clearer to large companies (51% of the 125 responding to this question). Micro enterprises are to 38% sceptic and lead in the response "don't know" or the "no" answer (19%).



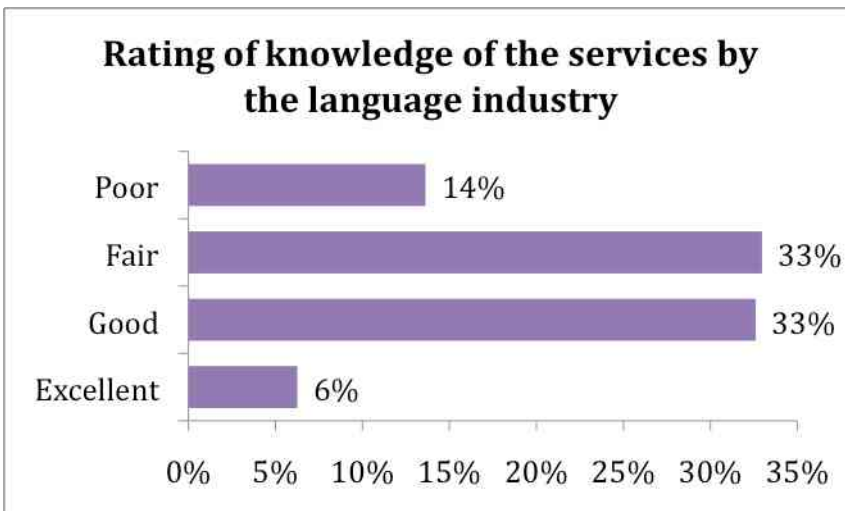
Sector wise, the preference for certified language service providers is led by the Retail&Distribution + Other Service sectors with 46% of respondents followed by the Agro-industries and Manufacturing sectors (44%).

In the ICT sector only 37% cared for certification, 36% did not know and 17% did not care at all. These percentages correlate to answers from micro-businesses and SMEs – the major part of the ICT sector, while large companies incline towards a higher use of certified providers.

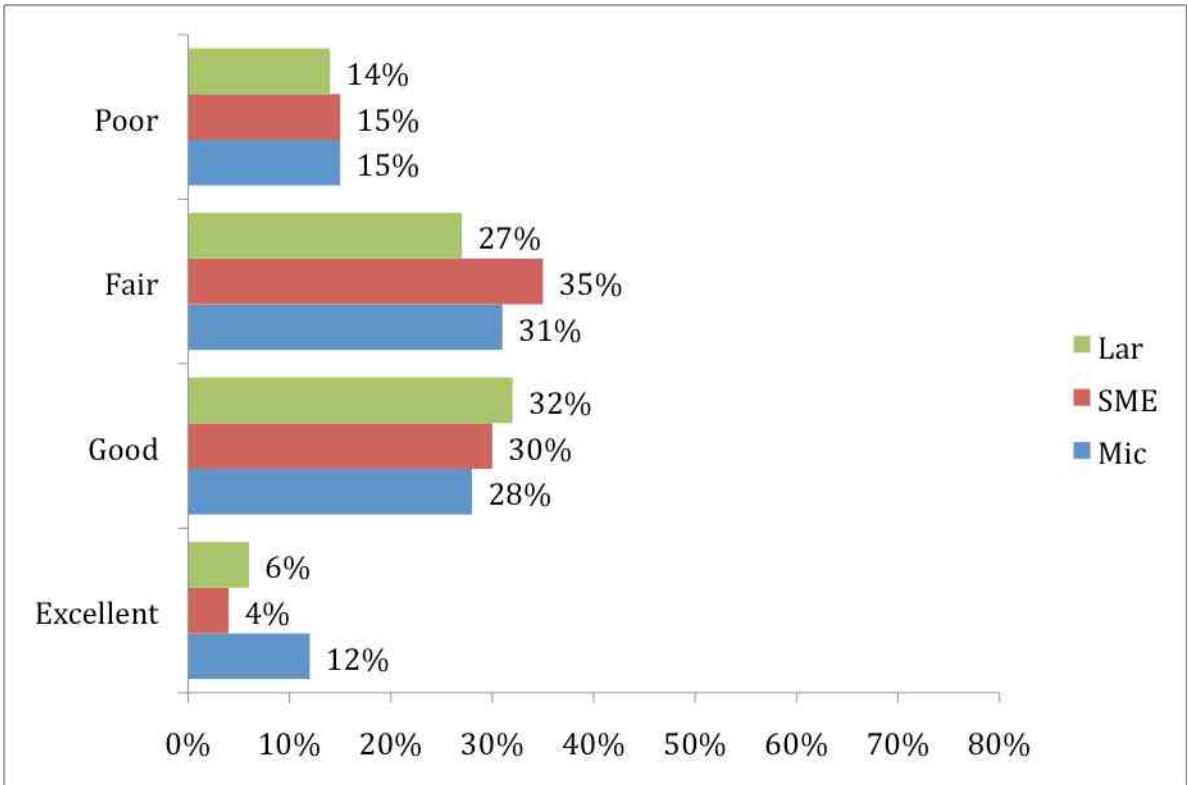


Question: How would you rate your knowledge of the services offered by the language industries?

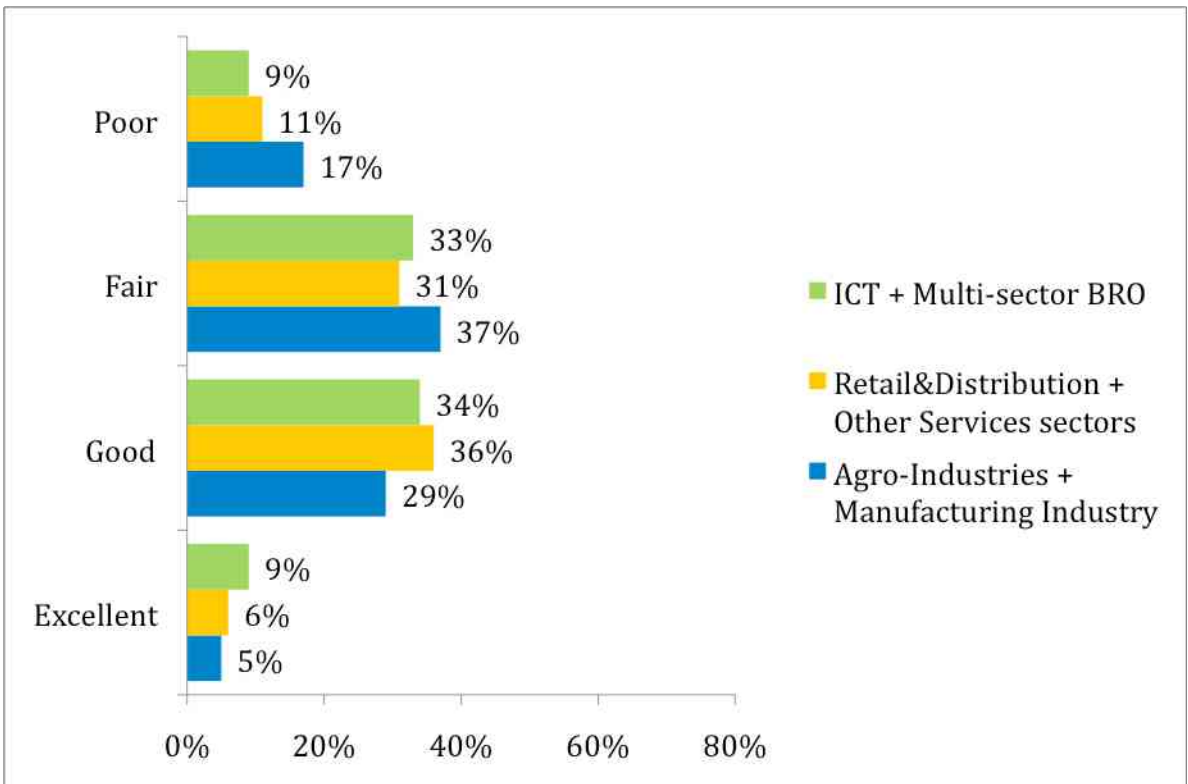
Also this question was answered by all 543 businesses consulted. Answers could range between excellent, good, fair and poor.



The majority across sectors answered with 33% each fair and good, 14 poor, 6 excellent. While the size played a minor role in the ranges of poor, fair and good, 12 % of micro enterprises claimed to have excellent knowledge (as opposed to 6% of large and 4% and SMEs).



ICT shares the average range of 33% fair and good; with 9% poor it scored lowest among all sectors and with 9% excellent highest, which again has its reflection in the company size of the ICT sector, with a considerable number of micro enterprises.



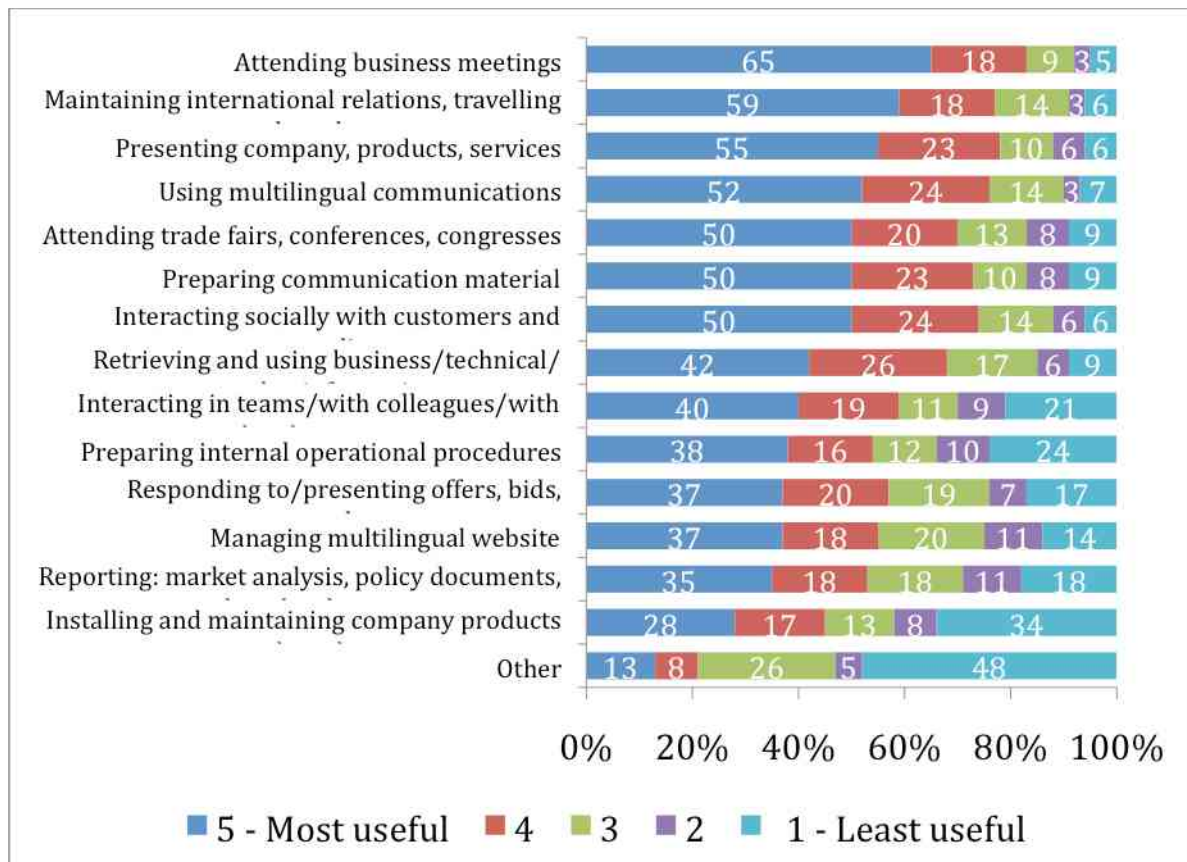
Question: In what specific business activities you commonly have to perform are foreign languages required?

The CELAN questionnaire proposed 14 specific business activities for allowing respondents to identify those most relevant for them and rate them with regard to their foreign language requirements. They addressed situations ranging from attending business meetings to installing and maintaining company products abroad and represent typical scenarios for any kind of business.

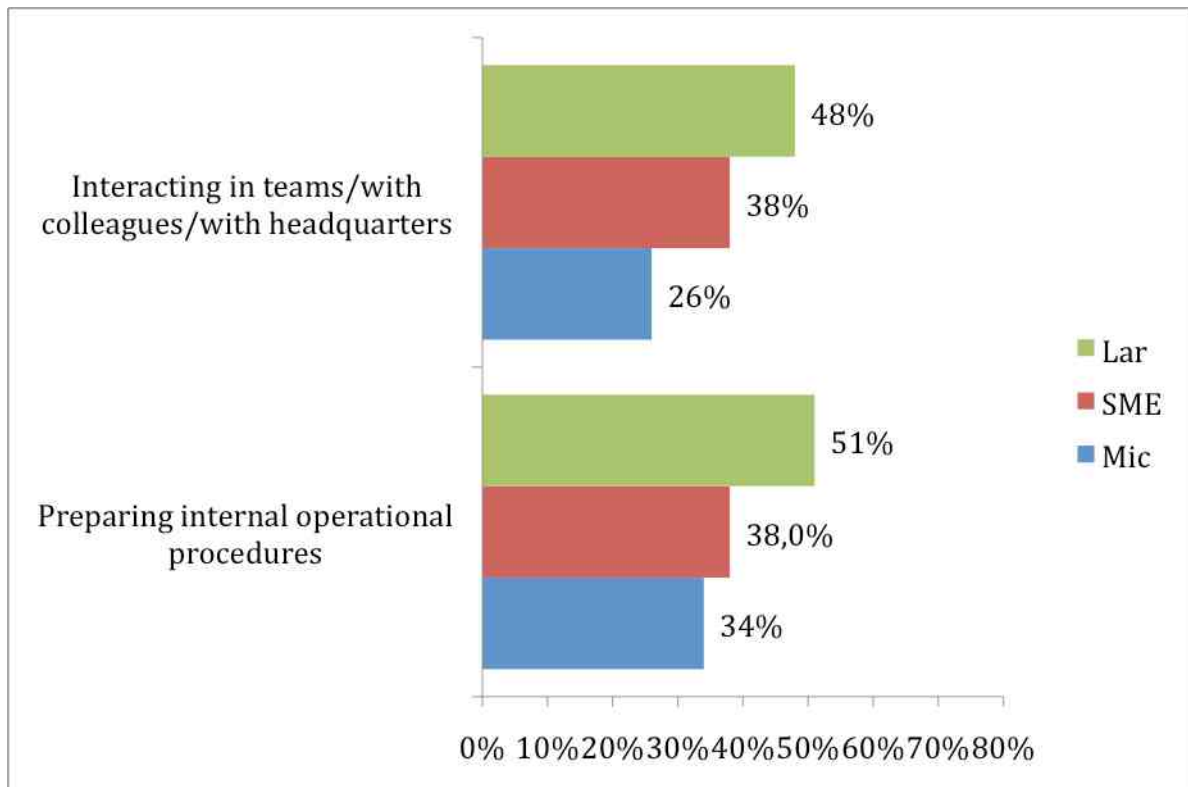
Apart of the "other" option that only 39 companies ticked, all other suggestions had a response rate between 358 (Preparing Communication material) and 399 (Presenting the company, products/services).

Overall the situations proposed were considered by businesses to require foreign language skills. In all except one (Installing and maintaining company products abroad), over 50% of the consulted companies indicated language skills to be most to very useful. The reason for this exception is probably the fact that this situation does not apply necessarily to the Retail&Distribution sector

The following graph presents the overall ranking:



Company size does not change very much the big picture. Only two specific situation merit a separate evaluation:

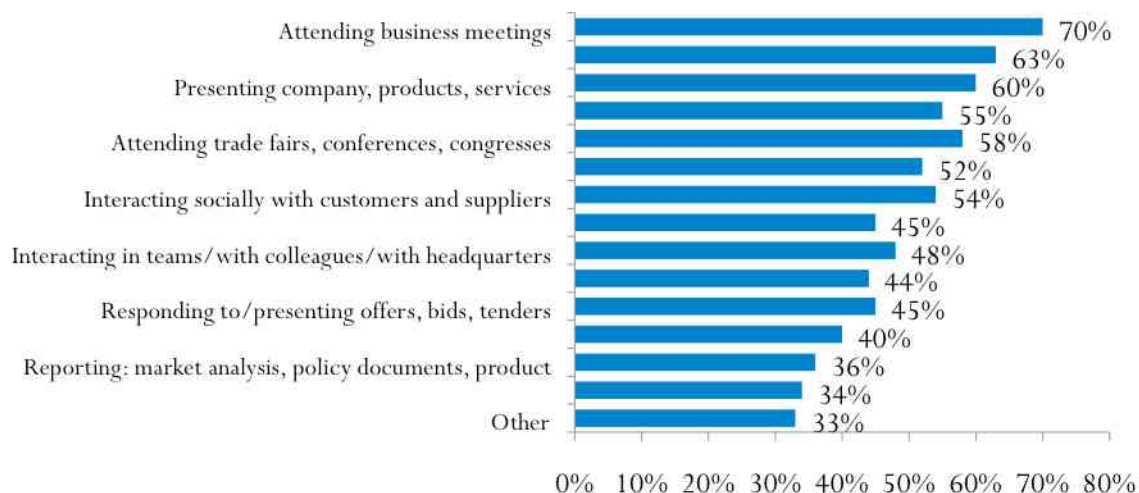


When it comes to teamwork or internal operational procedures, it can be noted that large enterprises have a higher sensitivity with respect to language requirements. Indeed, the size of the operation and the likeliness of language diversity in such undertakings advocate for higher language requirements compared to operations of a smaller dimension.

Small variations can also be observed in the sector analysis.

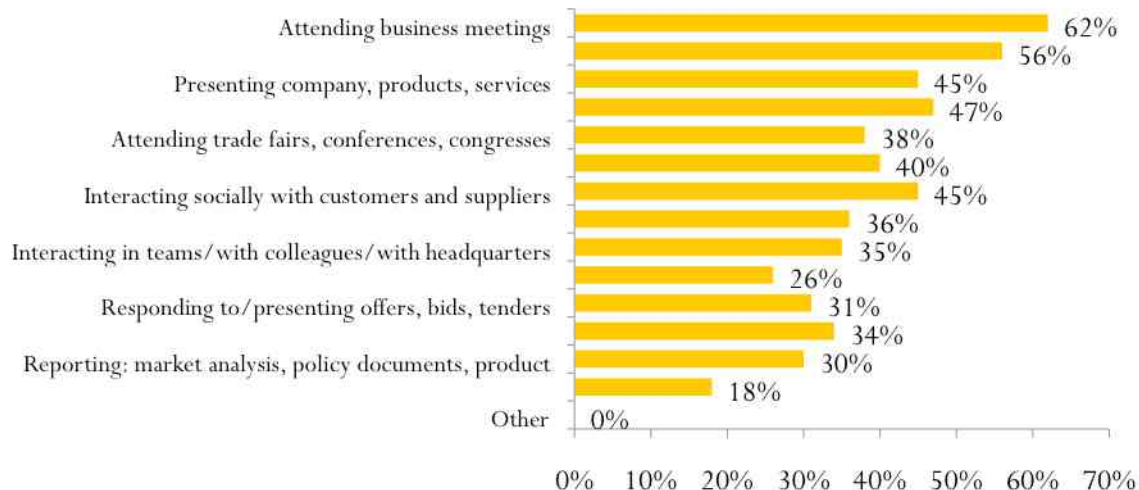
The Agro-Industries and Manufacturing sector have higher languages requirements in the area of "Presenting the company, its products and services" (60% of the sector's respondents), "Attending trade fairs, conferences or congresses" (58% of the sector's respondents), "Preparing internal operational procedures" (44% of the sector's respondents), "Responding to/presenting offers, bids, tenders" (45% of the sectors respondents) and "Installing and maintaining company products abroad" (34% of the sector's respondents).

Specific business activities (TopBox)



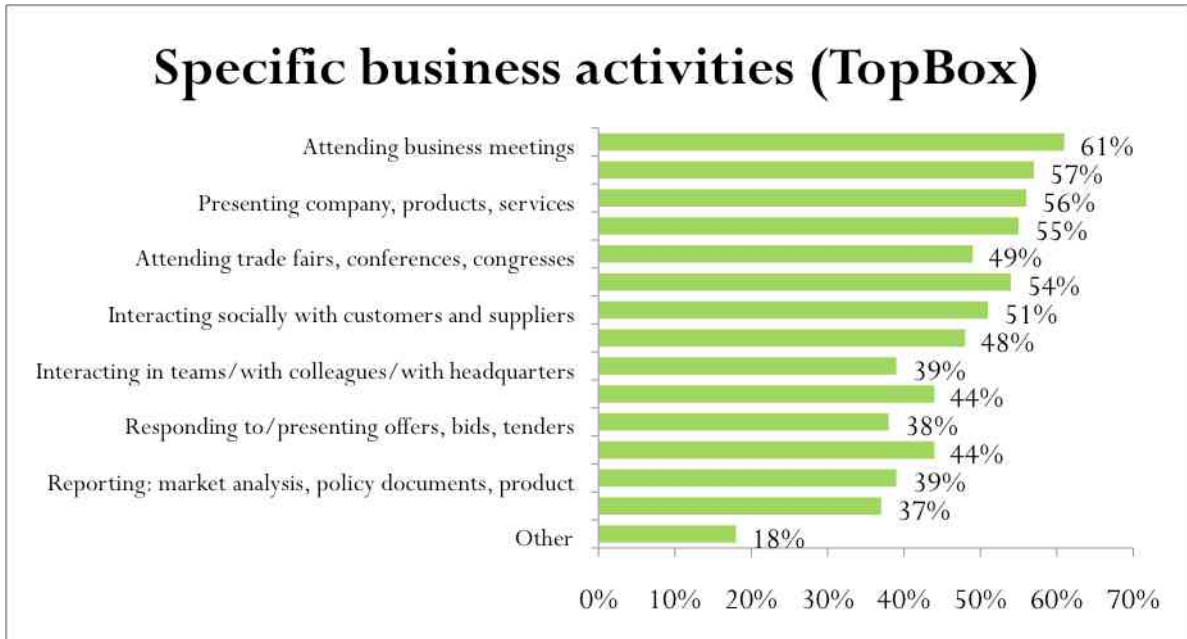
For the Retail&Distribution sector + other service sectors all the ratings resulted lower than the average and lower than the other sectors except the one concerning business meetings.

Specific business activities (TopBox)

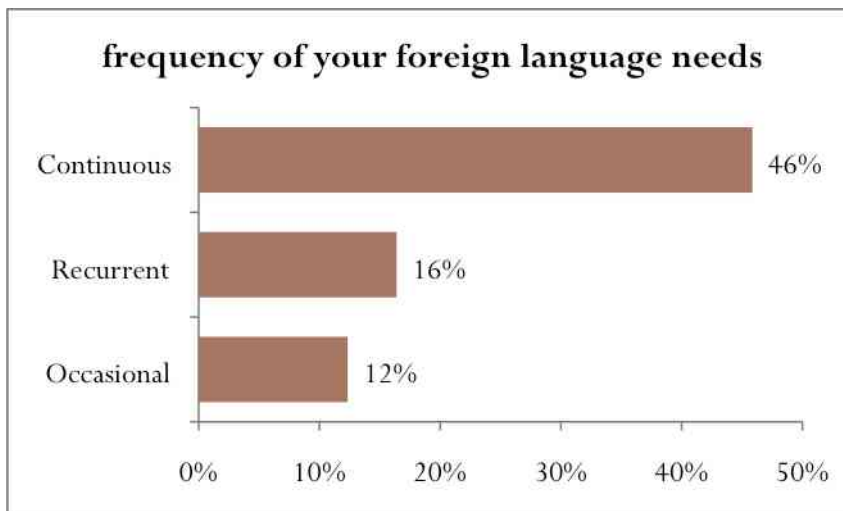


In the ICT and Multi-Sector BRO sector there are also some few variations. All sectors rate "attending business meetings" first, although the ICT sector rated it lowest with 61% (62% retail, 70% agro/manufacturing). Maintaining International relations/travelling abroad ranked two in all sectors but rank three differs from sector to sector: ICT clearly puts weight on communication as can be seen from the corresponding graph. Presenting company products and services, using multilingual communications, preparing communication material and interacting socially with customers and suppliers all ranked above 50% (56, 55, 54 and 51% respectively).

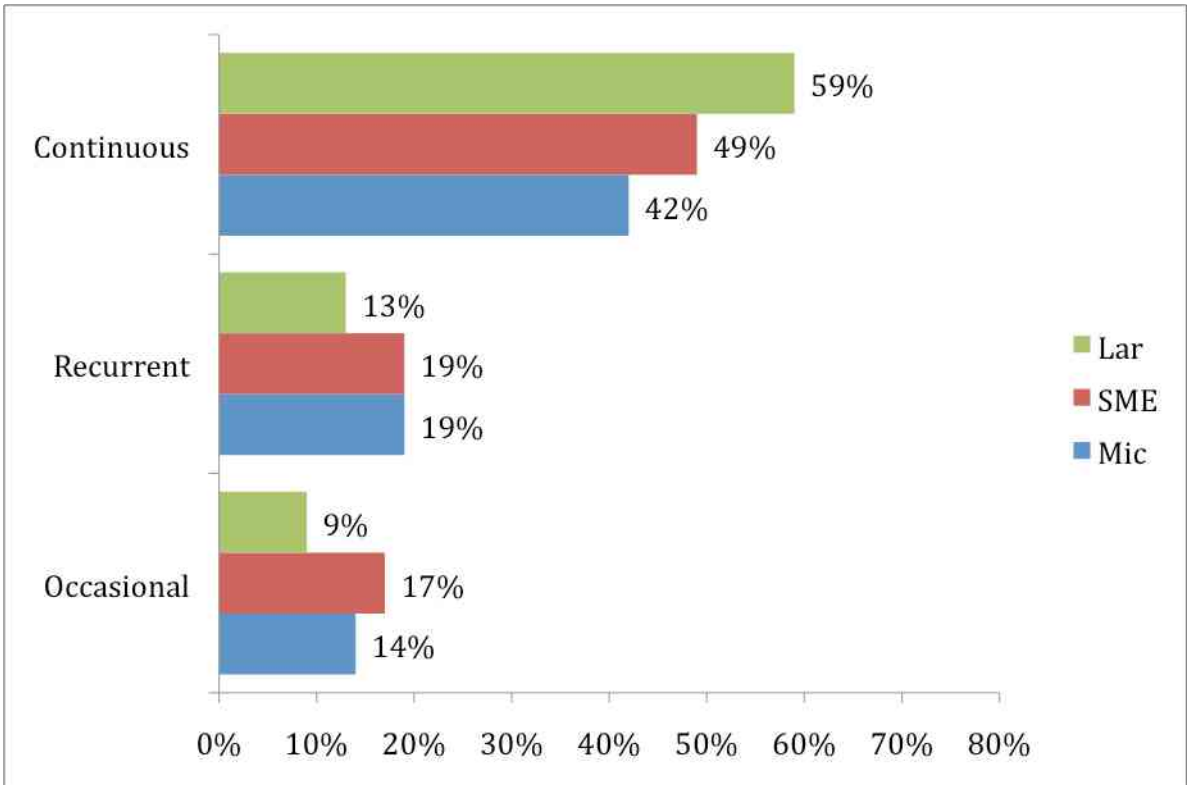
Other business activities showed some changes vis-à-vis the retail sector but is very similar to the agro/manufacturing sectors.



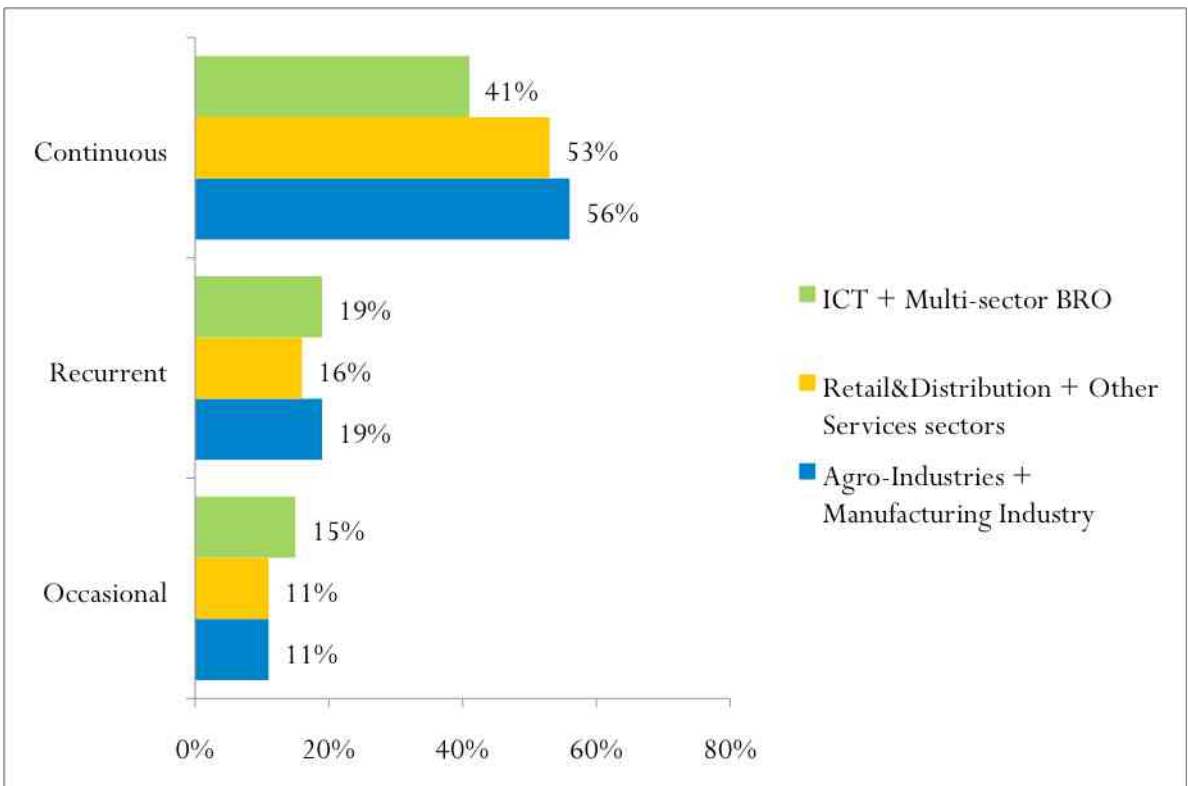
Question: What is the frequency of your foreign language needs?



The general average percentage across all sectors for "continuous need" is 46%, but it goes up to 59% for large companies.



Also the sector analysis reveals certain differences:



41% of the ICT sector sees a continuous need for foreign languages (as opposed to 53% retail: 56% agro/manufacturing). This is the lowest score

of the three segments. However, it is clear from the answers to the previous question (business activities): all activities that scored above 50% are not necessarily permanent activities but recurrent ones.

Question: What languages would you need most in your business?

The CELAN survey enquired also about the languages that European businesses were looking for on their way to multilingualism. CELAN wanted to know not so much what specific language was in demand but rather the motivation behind a given linguistic choice or in other terms whether there is a pattern that accompanies the linguistic development of businesses.

With regard to **languages needed**, four options were given, but answers were not limited to only one option:

1. Neighbouring EU country's language(s)

This option would be indicating a preference for close geographical proximity but within the EU boundaries.

2. Other EU language(s)

This option includes major international languages as well as languages with more or less geographical outreach and even regional or minority languages.

3. Neighbouring extra-EU country's language(s)

This option includes the languages of the Euro-Mediterranean area (Arabic, Turkish, etc.), but also Russian and other related languages and Norwegian and Swiss dialects.

With this option, businesses would be revealing an interest in expanding their area of influence in emerging proximity markets.

4. Oriental language(s)

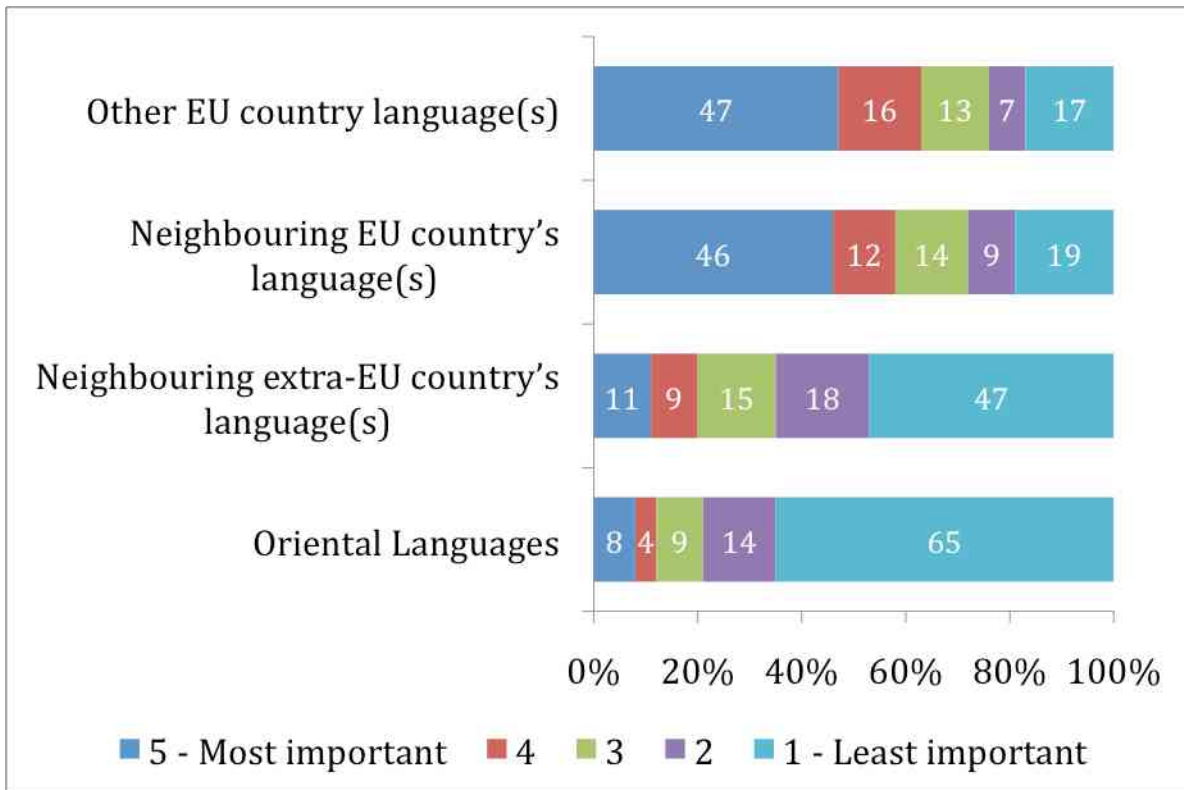
With this option, businesses would be indicating their desire to consolidate ties with the most dynamic global markets

Up to 375 companies responded to this question. In general those having ignored it were enterprises across size categories and sectors but speaking currently either only their home language or at least English if not more foreign languages.

The overall picture is presented in the following graph. It reveals that EU business have a clear preference for developing language skills that allow them to expand in a known cultural background first. EU languages were rated most important by 46-47% of respondents and very important by an additional 12-16% where the first score relates to the option of

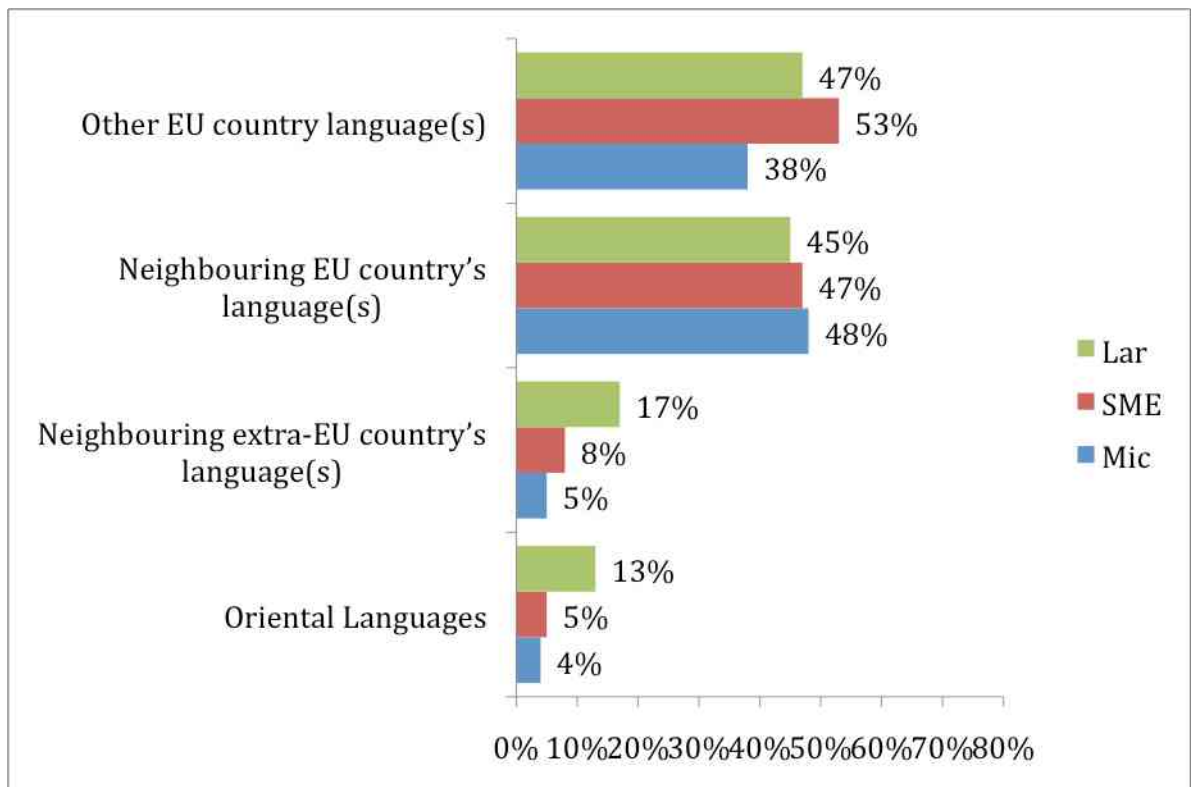
“Neighbouring EU country language” and the second to “Other EU country language(s)”.

Neighbouring extra-EU country’s languages and Oriental languages obtained a significantly lower score with 11% and 8% of preferences. Adding even the second best rating (very important), those languages do not go beyond the 20% overall score.



This indicates that the linguistic development of European businesses tends to be centred on languages whose investment opens up markets notably in the Western hemisphere.

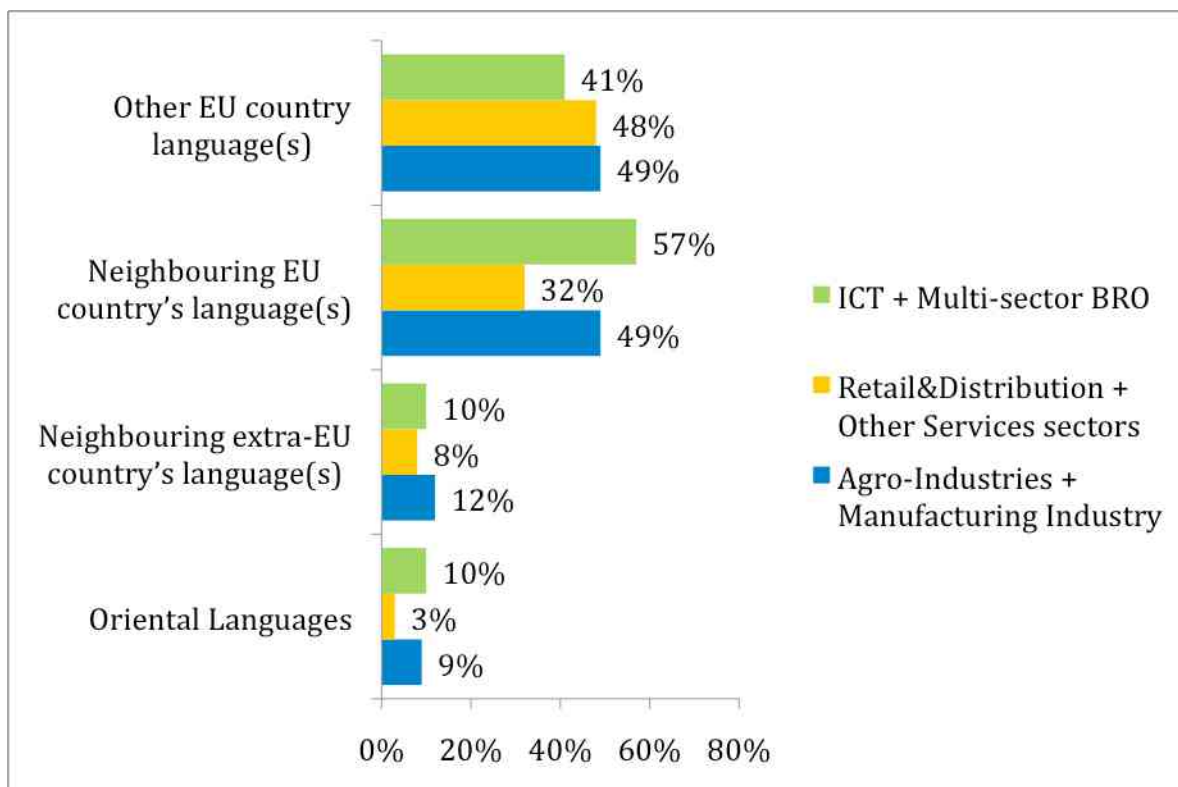
This overall finding needs to be nuanced. The analysis by company size categories reveals noticeable differences in particular for large companies and micro-enterprises:



While the overall distribution of foreign language requirements remains valid across all size categories, large enterprises indicate comparatively more needs for extra-EU neighbouring languages (17% of large enterprises consulted consider getting command of these languages as most important) and for oriental languages (13% of large enterprises consulted consider getting command of these languages as most important). SMEs and Micro-enterprises remain far behind their larger counterparts with less than half of these scores.

Micro-enterprises show a relative higher propensity to needing neighbouring EU country languages (48% of respondents compared to 45% and 46% of large companies and SMEs respectively) and are comparatively those companies with apparent fewer needs for extra-EU languages.

The analysis by sector categories reveals that it is the Retail&Distribution + Other Services sector that has in general less interests in modulating its language needs according to geographical zones. Only 1 company out of 3 in this sector considers the neighbouring country language as a must compared to every second in the ICT sector or Agro/Manufacturing industry. For the Retail&Distribution + Other Services sector oriental languages don't play any particular role.



While the investigated sectors score similarly on "Other EU languages" with ICT 41%: 48% retail and 49% agro/manufacturing, there is a difference between SMEs (highest with 53%) and micro enterprises with only 38% (across sectors).

When it comes to "Neighbouring EU languages", ICT sticks out with 57% (to 32% retail and 49% Agro/manufacturing) while size plays no role (between 45-48%).

Neighbouring extra-EU languages and oriental languages play a lesser role in ICT with 10% each.

However, these findings are very general and do not give a significant insight into company strategies. A look into the individual responses allows understanding better the rationale behind the responses given:

- Neighbouring EU country's language(s)

175 organisations consider their neighbours language(s) "most important". There were 117 companies mostly SMEs and Micro-enterprises from across all sectors and 58 BROs, of which 19 had a National constituency.

	BE	BG	DE	DK	EE	ES	FR	GR	IT	LU	MT	NL	PT	RO
Companies	3	2	3	29	6	6	29	3	9	2	1	1	2	21
Nat. BROs			2	1	5	2	2		5					2

87 of these 175 organisations (50%) did not give any score higher than 3 (average importance) to other options meaning that with this choice

(neighbouring country language(s)) they have virtually exhausted all their foreign language needs.

- Other EU country's language(s)

177 organisations consider "most important" other EU country's language(s) independently of whether they are neighbouring countries or not. 38 of these 177 (21%) consider also extra-EU languages or Oriental languages as very or most important. Conversely, 139 organisations (79%) understand that EU languages cover all their foreign language needs.

- Neighbouring extra-EU country's language(s)

34 organisations consider neighbouring extra-EU country's language(s) as "most important". 21 are companies while 13 are BROs. 5 of the 21 enterprises belong to a foreign group.

All but 3 of the 34 organisations rate also EU languages and/or Oriental languages as very or most important. These 3 are 1 Romanian large service company and 2 Latvian BROs active in the Agro-Industry and the Service sectors.

	BG	DE	DK	EE	ES	FR	GR	LV	PT	RO	SE
Companies	1		7	4	1	1	1	1	1	4	
Nat. BROs		1		4				6		1	1

- Oriental Languages

25 companies considered oriental languages "most important" but rated also other languages with the highest or high scores. All but 3 have already language skills in at least 1 other EU language further to their "mother tongue".

Interestingly these 3 companies quoting "Oriental languages" as most important speak currently just their home language (ES, DE, RO respectively) and none has the command of English.

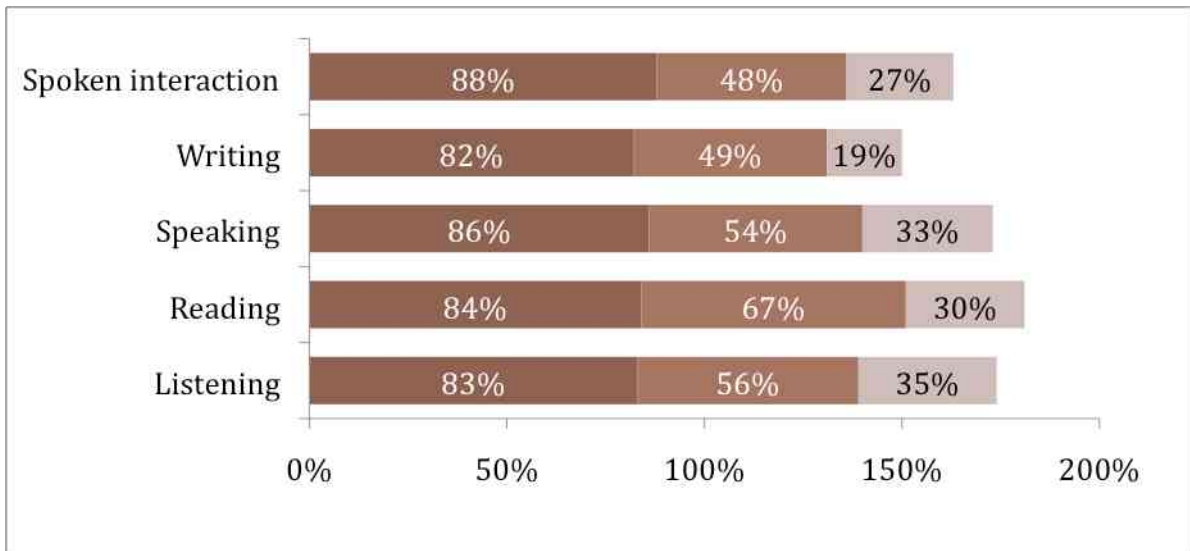
Question: Who needs language skills in your enterprise?

With the question "who needs language skills in the enterprise?", CELAN wanted to get insight into the language needs of the various professional categories.

Answers could be given according to staff category, e.g. management, technician, shop floor and others, and use of language, e.g. spoken interaction, writing, speaking, reading, listening. The "other staff" category was not sufficiently used for a statistical evaluation.

A total of 406 businesses responded to this question in the CELAN consultation while 137 abstained to give any indication.

The following graph gives the percentage of votes casted for each of the staff categories and skills requirements within the command of foreign languages:



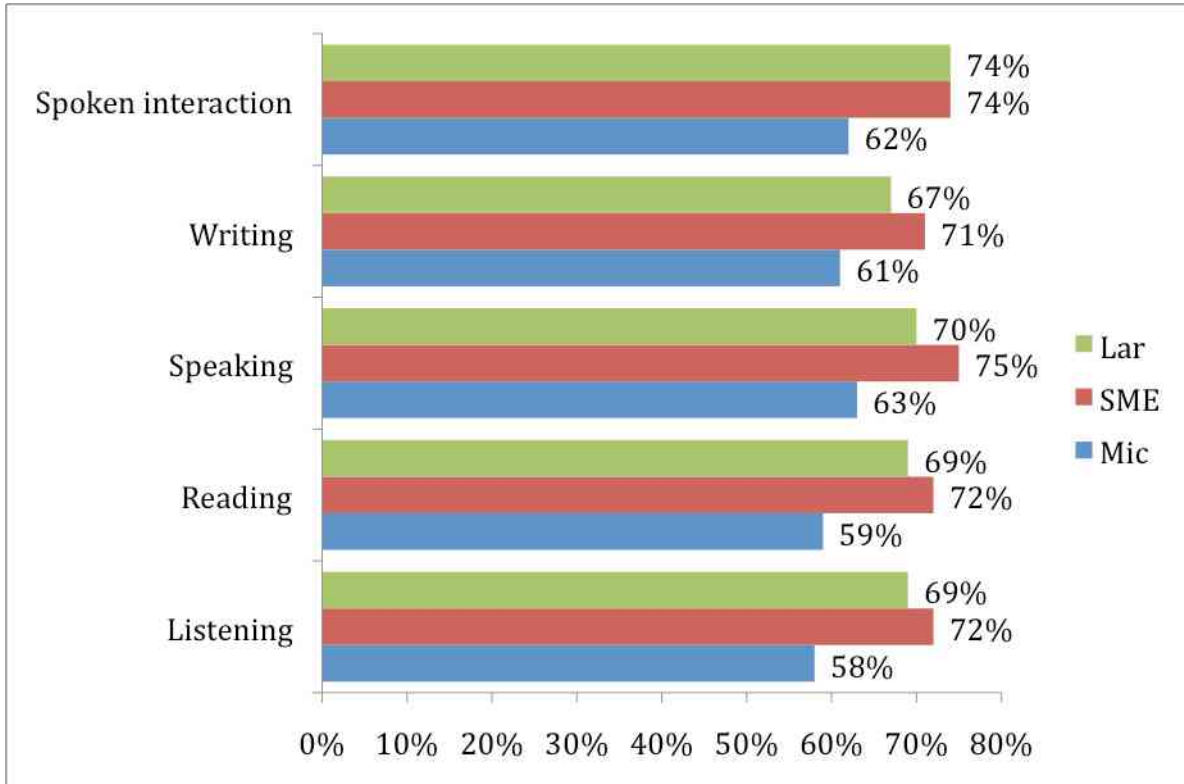
It results that:

1. There are businesses accepting their various staff categories not to be 100% proficient in all language related skills.
2. The skill that has received most votes in absolute terms and across staff categories is "Reading", i.e. the capacity to understand text written in a foreign language (735 votes), followed by "Listening", i.e. the capacity to understand the spoken foreign language (707 votes) and "Speaking", i.e. the capacity to express ideas in a foreign language (702 votes). "Spoken interaction", i.e. the capacity to react and discuss in a foreign language received a total of 662 votes across staff categories, and "Writing", i.e. the capacity to communicate intelligible concepts in letters and characters, received the lowest total score of 613 votes.
3. Full proficiency of a foreign language, i.e. a vote in all of the proposed skills, for a given staff category would be theoretically ascertained with a total score of 2030 votes (i.e. 406×5). Management obtained 1718 (85%), Technicians 1112 (55%) and Shop Floor workers 589 (29%). This means that business expects the highest requirements in the command of foreign languages at management level while the level of technicians suffices to be "average" and the one of shop floor workers "minimal".
4. For Managers the skill that most Businesses (88%) expect is their capacity to maintain a spoken interaction in a given foreign language. The most required language skill for Technicians (67% of businesses) is their capacity to read a text in a foreign language, and for shop floor workers their capacity to understand and to express themselves in a foreign language (35% and 33% of businesses respectively).

288 out of the 406 businesses having responded to this question expect their management to have all language skills in a given foreign language. For Technicians this requirement is expected by 110 businesses generally expecting this also for the management. With regard to shop floor workers, only 50 businesses expect that this category fulfil all language related skills,

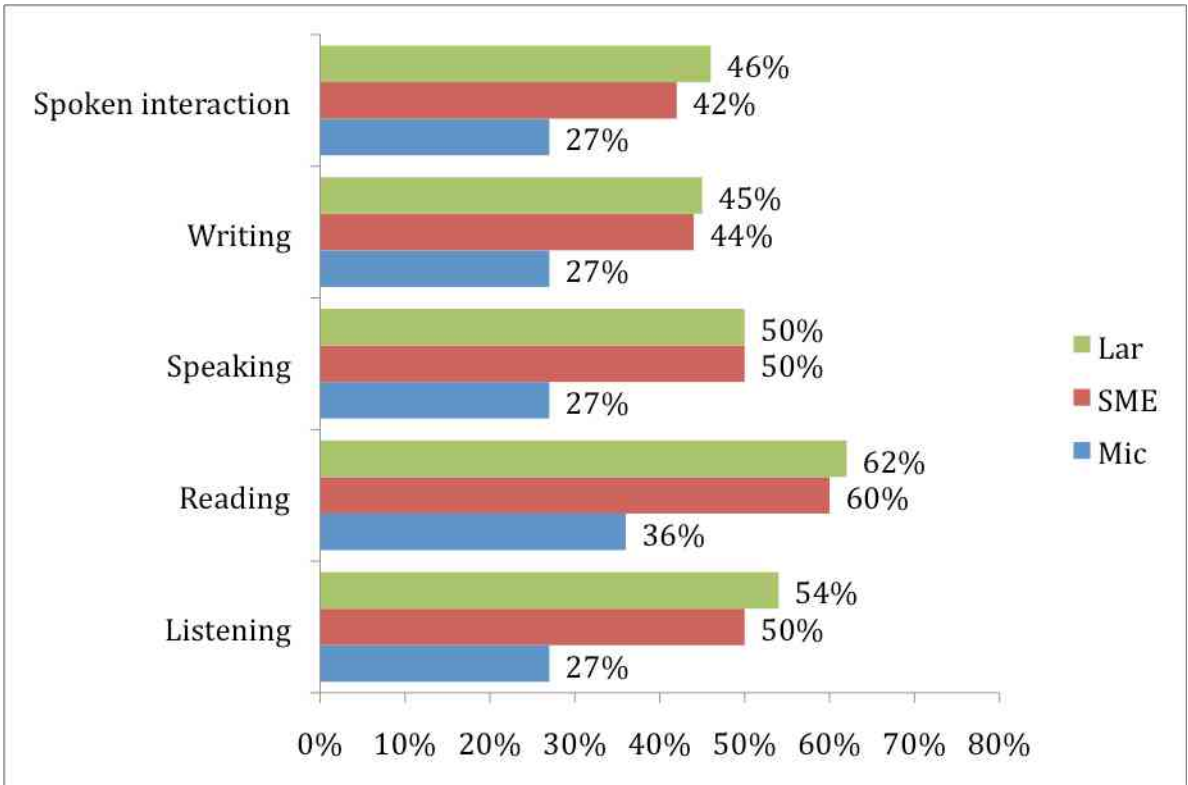
requirement that is in general also expected by managers and technicians. This means that for every 100 businesses with full proficiency in foreign languages at management level the ratio of full proficiency at technicians level is about 30% and at shop floor level some 15%.

The following graph shows the amount of companies by size categories expecting specific language skills for managers:



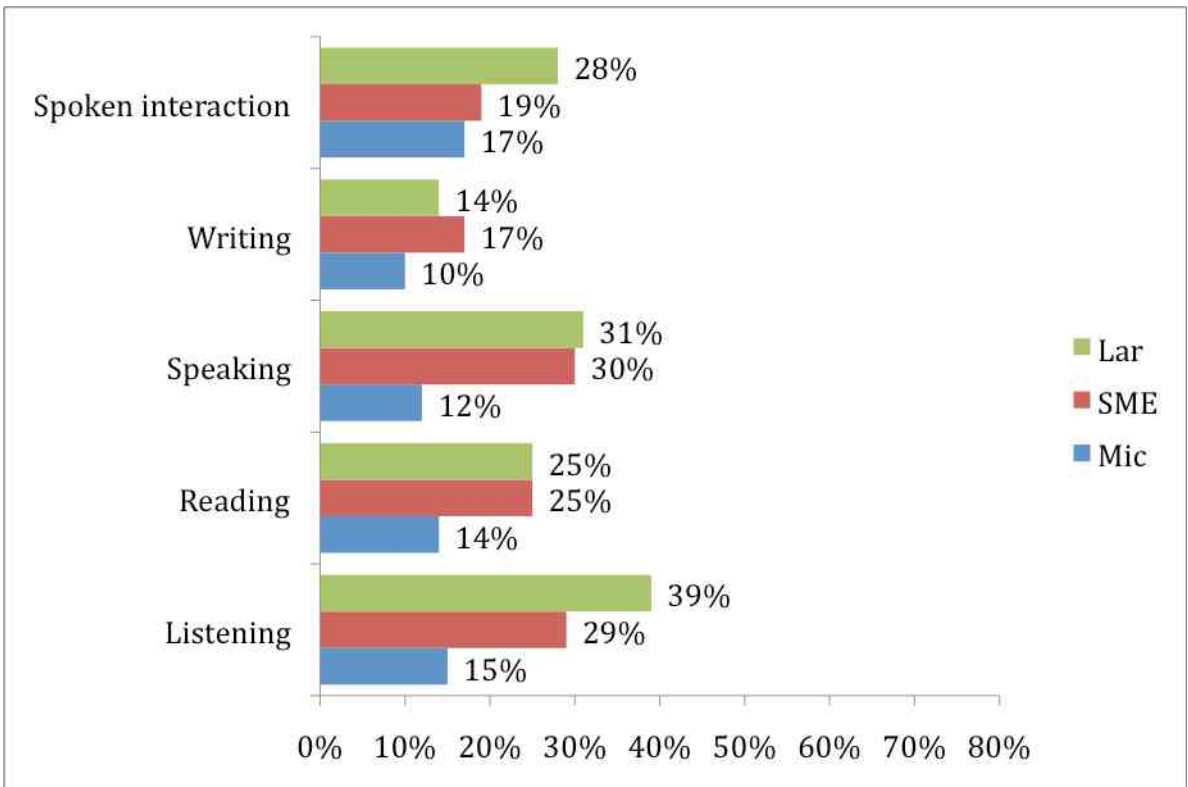
There are no big differences between large companies and SMEs, while micro-enterprises seem to require their management to have less language related skills.

The picture with regard to technicians looks as follows:



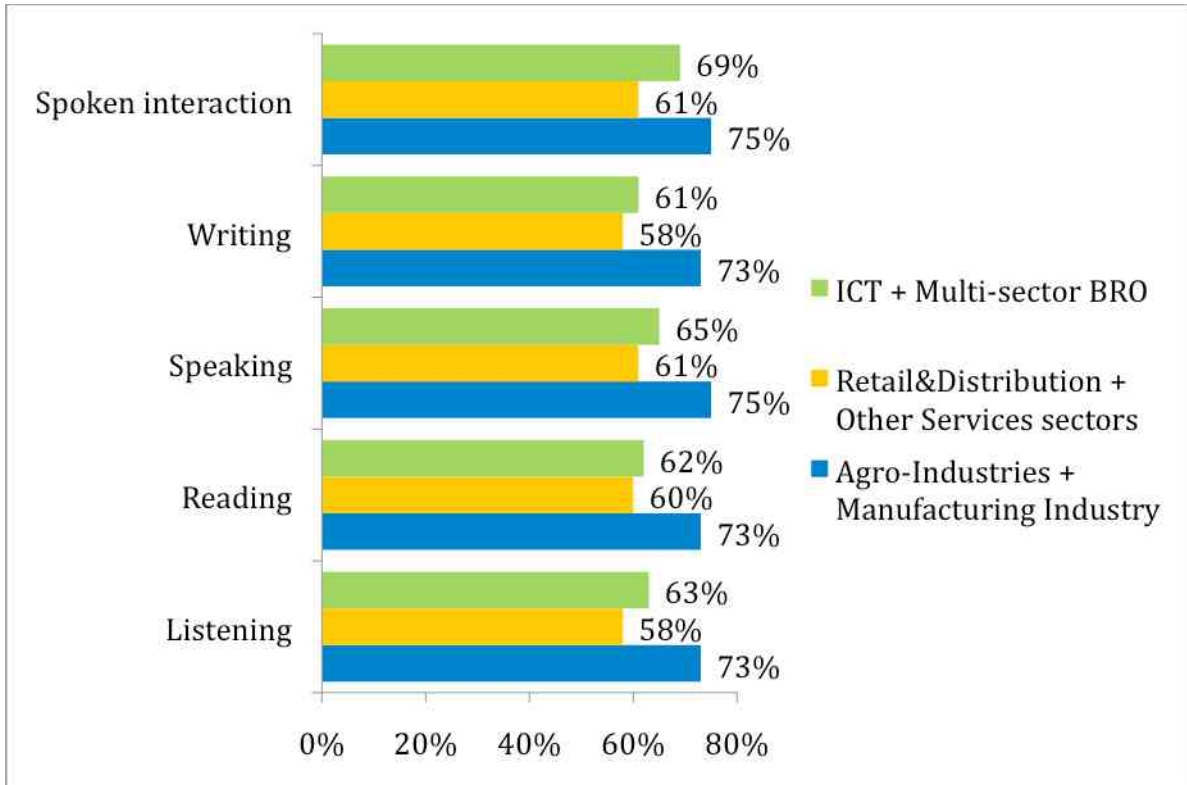
Here again we see that micro-enterprises have less expectations with regard to the language related skills of their technicians.

And finally, the shop floor:



The sector analysis brings also some interesting insight:

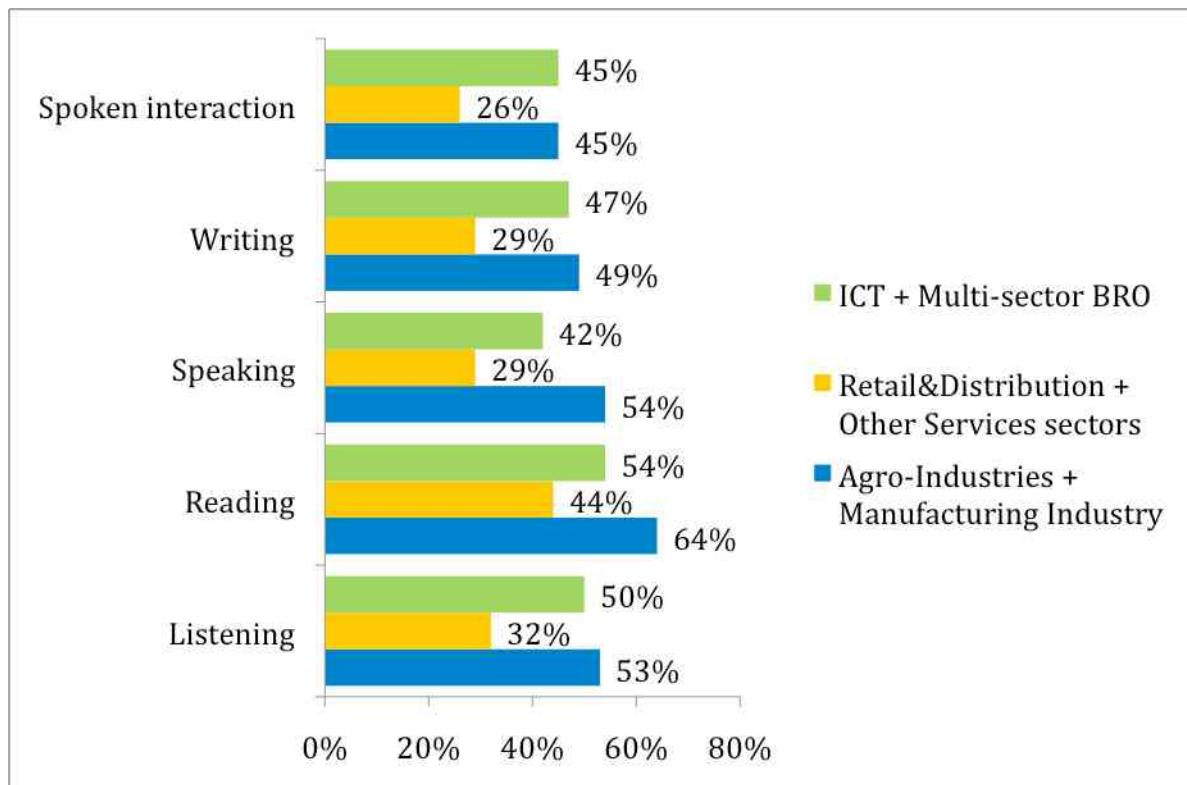
Management:



Agro-Industries and manufacturing businesses are the ones expecting most language skills from their managers (73-75% of businesses), ICT ranks second (61-69% of businesses) and Retail&Distribution + Other services last (58-61% of businesses). Highest is spoken interaction, lowest writing, although the percentage is overall very close. It is interesting that the Agro sector at managerial level is overall in the 70ies (between 73% and 75%) and the retail sector between 58% and 61%.

Compared to business size, SMEs rank highest (between 71% and 75%) whereas Micro enterprises rank 63%, with large enterprises in between both.

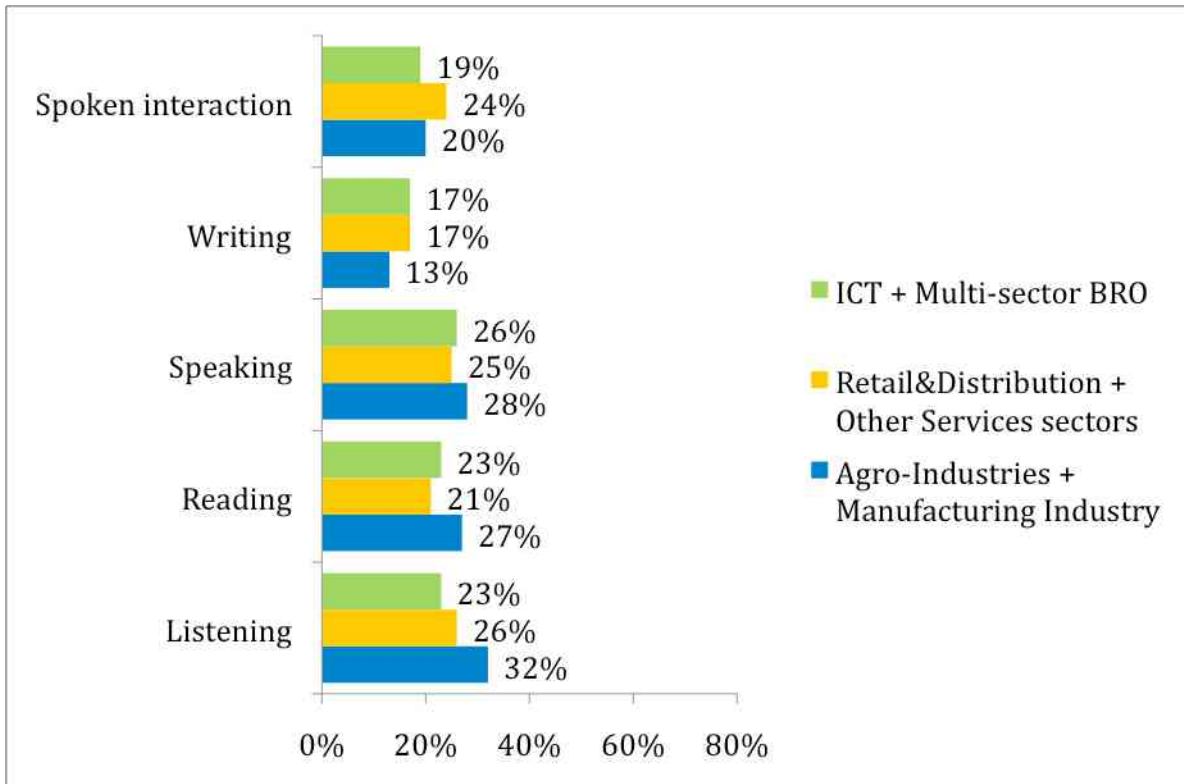
Technicians:



With regard to the size of the company, it is significant that large enterprises and SMEs on average need double as much skills at technical level than micro enterprises, no matter which type of language use (spoken, written etc.). Reading is the most used in this staff category. Agro/manufacturing needs most language related skills, closely followed by ICT while retail is lowest. Most important also here: reading.

Here, most differences appear amongst sectors, with ICT and Agro/manufacturing at similar rates to large and SME enterprises, and the retail sector clearly 1/3 + below. In ICT, reading and listening comes first (54 and 50%), followed by writing, spoken interaction and speaking (47, 45 42%).

Shop floor:



With regard to size: The bigger the enterprise, the more need for language skills there are, although overall considerably lower than at management level. Listening scores 39% in large companies, followed by 29% SMEs and 15% micro. This is the skill with highest discrepancy by size. Naturally, writing scores lowest in this staff type.

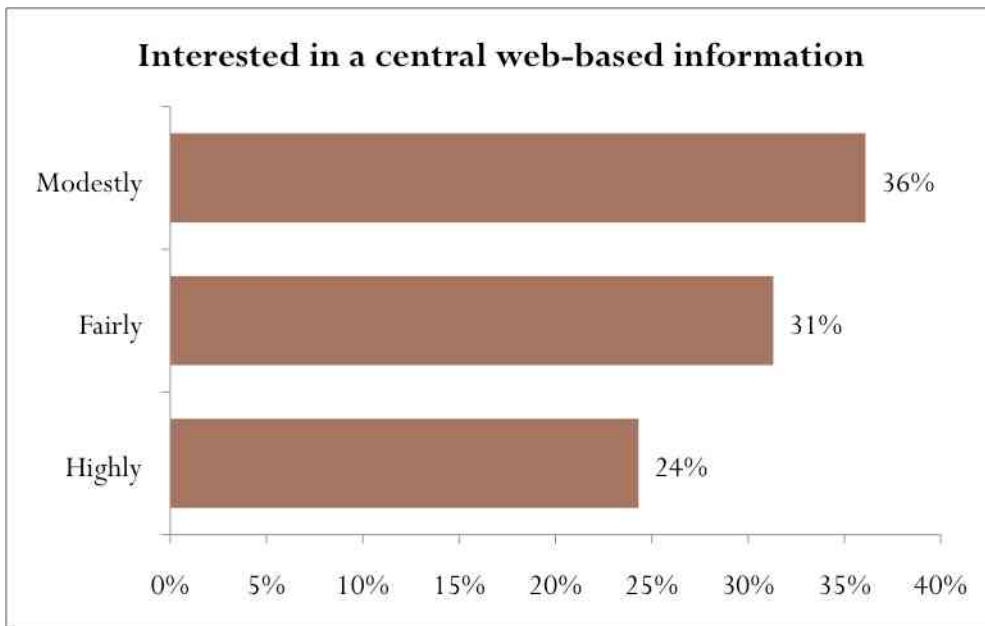
Sectoral differences are closer here than with technicians. It is not surprising that spoken interaction is highest in retail (24%) followed by agro/manufacturing with 20% and ICT 19%.

For the ICT sector, speaking comes first (26%), followed by reading and listening (both 23%), spoken interaction 19% and writing 17% last.

2.3. Concluding questions for business

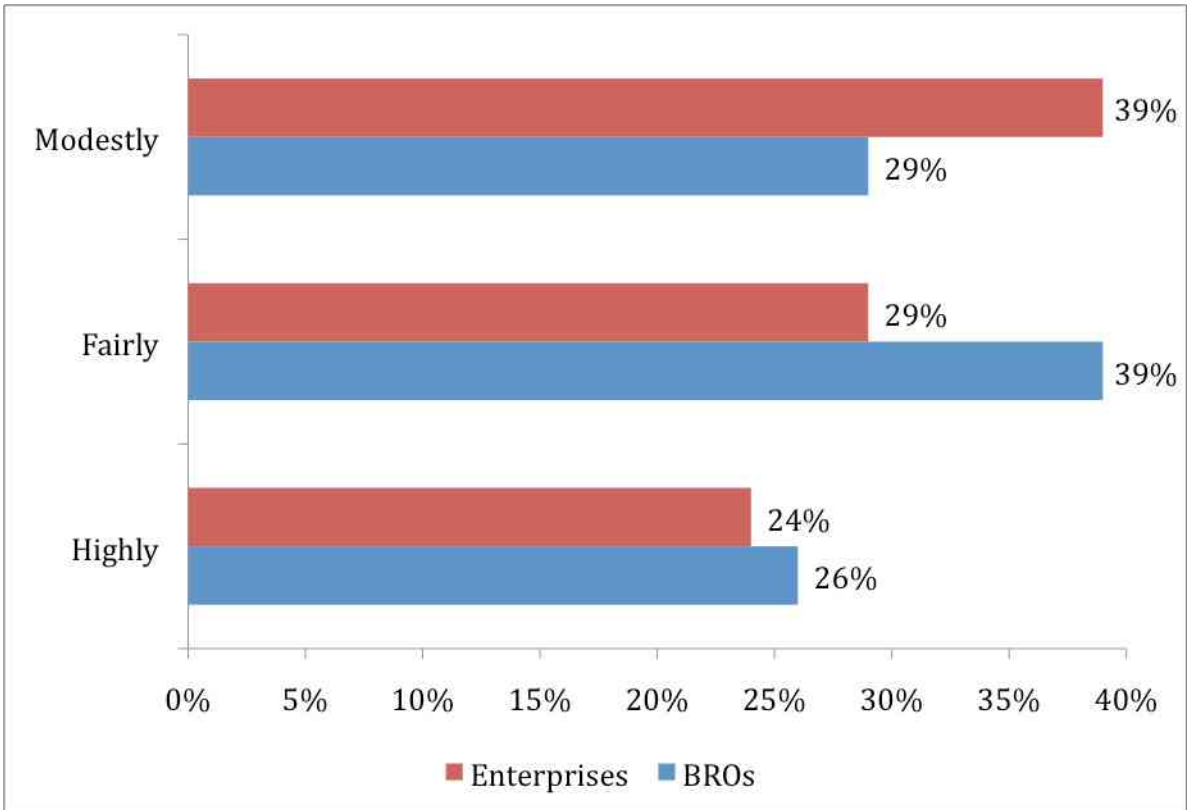
Question: Would you be interested in a central web-based information point for language strategies for business?

This question received answers from 518 respondents. They could chose between "very interested", "fairly interested" and "modestly interested" (lowest).

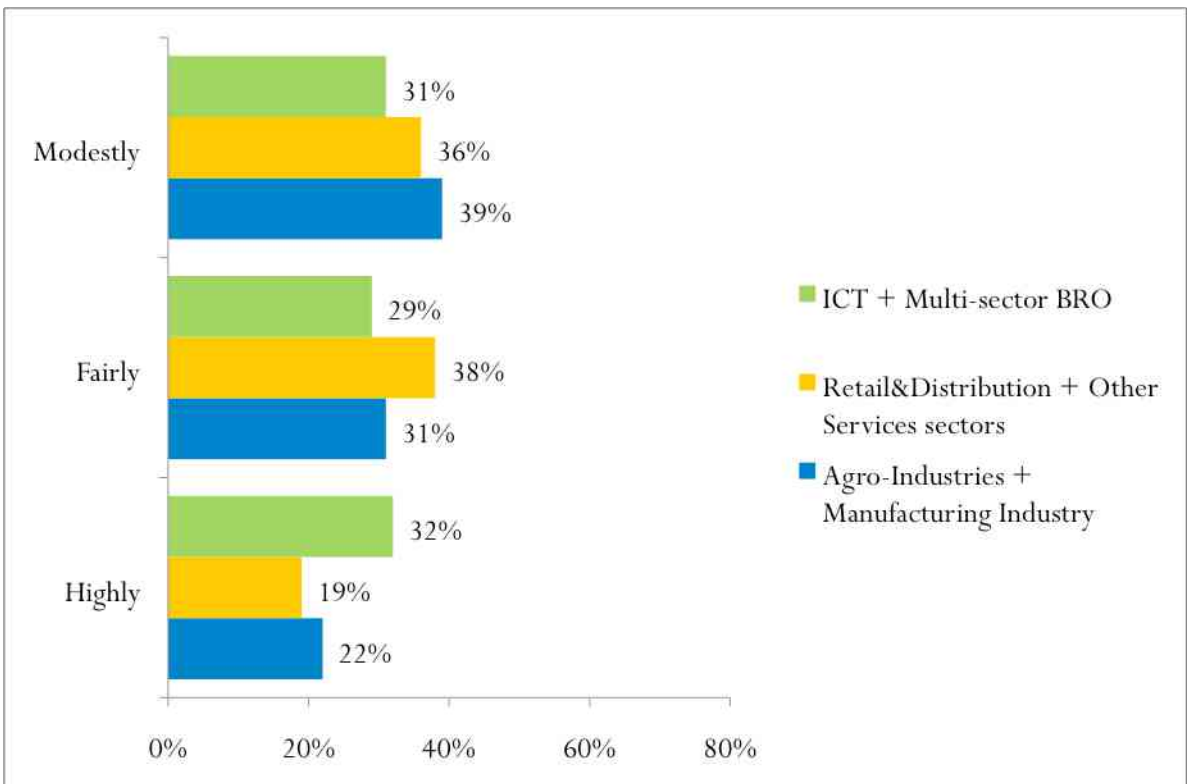


Overall, only 24% of respondents are very interested.

There is a difference between companies and BROs:



While 39% of BROs are fairly interested, only 29% of companies are fairly interested.



ICT is the most interested sector. This is not surprising given that it is more accustomed to on-line tools than any other sector: 32% are very interested, 29% fairly and 31% modestly interested.

3. Conclusions

The main conclusions that could be drawn from the results of the CELAN consultation are:

1. Languages play a fundamental role in European businesses for their development in a globalised World

Multilingualism is no longer a choice or an option; it has become a must for business growth. The command of foreign languages is needed above all in external relations as a matter of customer care and customer relationship management, but also for ensuring trust in strategic partnerships with foreign parties.

2. European Business relies on the labour market for the supply of Human Resources with the required language skills

86% of businesses use the recruitment route for satisfying their foreign language needs. This implies adequate educational systems capable to provide such skills to the economy. Business compensates the dysfunctions of the labour market in this area by providing in-house language training.

3. Lack of language skills could become an impediment for employability, notably for careers leading to management positions

The risk that languages or their lack becomes a social discrimination cannot be disregarded. Lack of language skills could become a barrier for escalating the social ladder.

4. European Business understands that further to the economic driver there are also other important reasons for getting multilingual

Cultural and quality motivations play increasing roles in businesses' linguistic development while the main reason remains the economic factor. It could be argued that culture and quality are becoming key elements for the economic development of business.

5. The majority of European Businesses still lack a corporate language development strategy

While Business has in general integrated into formal management strategies environmental or social considerations, a strategic use and development of language is not yet part of corporate culture. Corporate Language Development (CLD) is far from the support given to Business for the development of CSR.

6. Business has a good overview of the tools and services offered by the language industry and uses them as appropriate

The most popular language tools are those that make it into operational systems, where the user does not need to purchase them separately and whose use, being intuitive, doesn't require particular skills. The successful marketing of language services is possibly more complex and difficult.

7. EU languages cover well European Business Needs, at least for a start

English continues to be perceived as THE language that opens most doors, but not all.

The CELAN consultation distinguished between the various size categories of businesses and between different broad sectors. This exercise revealed that while overall business tends to have similar views and needs with regard to languages and linguistic needs, there are some noticeable differences that need to be taken into consideration:

The most interesting differences observed with regard to the size of enterprises are the following:

1. Large enterprises are much more sensitive to the importance of languages in their relations with Human Resources and Suppliers than their smaller counterparts.
2. Micro-enterprises see more than their larger counterparts the importance of languages in relation to Partners.
3. Large enterprises are ahead of their smaller counterparts in the recruitment of native speakers when it comes to fill positions requiring foreign language skills.
4. Quality is comparatively a much more motivating factor for micro-enterprises than for other size categories of business.
5. Large enterprises have understood more than other size categories of business the need to develop formal language development policies.
6. Large enterprises and SMEs understand better the importance of language courses than micro-enterprises.
7. Large enterprises are more interested than other size categories of business in certified language services providers.
8. Large enterprises feel more needs for language skills in the interaction in teams and in preparing internal operating procedures than SME's and Micro-enterprises.
9. Large enterprises have clear continuous language needs and are also those identifying the importance of oriental languages more markedly.
10. Large enterprises and SME's put a higher degree of importance in all kind of linguistic skills for technicians and shop floor workers than micro-enterprises.
11. Micro-enterprises see the interest of a Web-based language needs portal more than their larger counterparts.

Also the sector perspective allows identifying certain relevant differences:

1. Businesses in the Retail & Distribution sector and in the Service sector as well as in ICT where languages do not play at present an important role understand more than Industry that this may change in the future.
2. Languages in business relations with suppliers are clearly more important in the Agro and Manufacturing industry than in other sectors.
3. Languages in relations with partners are more required in the ICT sector than in other sectors.
4. The Agro and Manufacturing industry as well as the ICT sector look more than other sectors at the language skills of technicians than the distributive trades and services.
5. The development of formal language policies is more in the mind of Agro and Manufacturing industries than in other sectors.
6. The ICT sector needs language skills more intensely in activities regarding the preparation of internal operational procedures and in responding to bids, tenders and presenting offers, as well as for installing and maintaining company products abroad.
7. Agro and Manufacturing industry puts more emphasis in languages when it comes to presenting the company, its products or services, attending trade fairs, conferences and congresses, as well as responding to bids and tenders and presenting offers and installing and maintaining products abroad.
8. Language needs are markedly more continuous in the Agro and Manufacturing sector than in other business areas.
9. ICT businesses feel more than other sectors the interest of a Web-based language needs portal.

This Report bringing the main findings of the CELAN consultation of 543 European Businesses on their language needs developed during the second quarter of 2011 should not be seen as a definitive and ultimate picture on the subject matter. It is not the end of an investigative exercise. It is a start. Indeed, the CELAN project will keep its questionnaire on-line allowing any new respondent to add his opinion on his business needs regarding languages, and comparing his answers with those of his peers. This CELAN Report is the seed for a "living" Report on the Internet, open to all with instant feedback to users on how other businesses respond to the same query.

Therefore, while some of the results highlighted in this report may be consolidating over time, others may not be valid any longer in, say, 6 month from now. Business evolves and its needs change.