

# THE ENGLISH EFFECT

The impact of English, what it's worth to  
the UK and why it matters to the world

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## ABOUT THE BRITISH COUNCIL

The British Council creates international opportunities for the people of the UK and other countries and builds trust between them worldwide. We are a Royal Charter charity, established as the UK's international organisation for educational opportunities and cultural relations.

We work in more than 100 countries, and our 7,000 staff – including 2,000 teachers – work with thousands of professionals and policy makers and millions of young people every year through English, arts, education and society programmes.

We earn over 75 per cent of our annual turnover of £781 million from services which customers pay for, education and development contracts we bid for, and from partnerships. Less than 25 per cent of our turnover now comes from a UK government grant. We match every £1 of core public funding with over £3 earned in pursuit of our charitable purpose.

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# FOREWORD

The English language is perhaps the United Kingdom's greatest and yet least-recognised international asset. It is a cornerstone of our identity and it keeps us in the mind of hundreds of millions of people around the world, even when they are not talking to us.

English is spoken at a useful level by some 1.75 billion people worldwide – that's one in every four. By 2020, we forecast that two billion people will be using it – or learning to use it. And it is the economically active, the thought leaders, the business decision-makers, the young, the movers and shakers present and future who are learning and speaking English. They are talking to each other more and more and English is the 'operating system' of that global conversation.

The English language was forged by the UK's unique history and now provides a major economic contribution to the UK's prosperity. Thousands of students come to the UK to study English, contributing some £2 billion a year to local and regional economies across the country. Many carry on to further and higher education, continuing to contribute directly through tuition fees and by living here. In the process, they form personal, professional and business relationships with people and organisations in the United Kingdom which will continue when they return to leadership positions in their own countries. Much less of this would happen without the attraction of the English language.

But English adds value well beyond the UK economy. Research shows how a good command of English can not only enhance an individual's economic

prospects but also contribute to national growth and competitiveness. In a 2012 survey by the Economist Intelligence Unit, nearly 70 per cent of executives said their workforce will need to master English to realise corporate expansion plans, and a quarter said that more than 50 per cent of their total workforce will need English ability. English is becoming a core criterion in determining employability. Early adopter advantages are gradually fading and are being replaced by economic disadvantage for those who do not speak the language. Those who are not online or cannot speak English are increasingly left behind.

English makes a significant contribution to sustainable global development. It eases trade between countries that do not share a common language. It is used as a language of convenience, facilitating dialogue and building trust where an understanding of diverse positions is crucial – notably in peacekeeping and conflict resolution, where security forces and other uniformed services increasingly speak to each other in English. A fairer, more prosperous world is a safer and more secure world, and English is increasingly the lingua franca that holds together the international conversation and debate in areas such as climate change, terrorism and human rights. It is the UK's greatest gift to the world and the world's common language.



**Mark Robson**  
**Director of English and Exams**  
**British Council**

*Mark Robson is a member of the British Council's Executive Board. Much of his business career has been in international consumer product marketing and sales, including at the market research agency MORI, Colgate-Palmolive, and the US conglomerate Georgia-Pacific.*

# EXECUTIVE SUMMARY

- **English is the world's common language.** English has come of age as a global language. It is spoken by a quarter of the world's population, enabling a true single market in knowledge and ideas. It now belongs to the world and increasingly to non-native speakers – who today far outnumber native speakers.
- **English gives the UK a competitive edge.** For the UK today, it provides a strong competitive advantage in culture, diplomacy, commerce, media, academia and IT, and in the use and practice of soft power.
- **English drives growth and international development.** For developing and emerging economies, there is enormous demand and need for English in public education systems to boost stability, employability and prosperity.
- **English changes lives.** The impact of globalisation and economic development has made English the language of opportunity and a vital means of improving an individual's prospects for well-paid employment.

- **The UK needs to continue to invest in sharing English.** The UK needs to be able to respond to this global demand by continuing to attract young people into teaching English and by investing in sharing English with the world.

The growth of English, and the emergence of the internet as a truly global communication channel with few boundaries, are mutually reinforcing trends. Thanks to the internet, the rise of social media, the speed and spread of global communications technology and the increasingly globalised and interdependent global economy, English now allows the rapid cross-pollination of ideas and innovation around the world, and the development of a new kind of supranational single market in knowledge and ideas.

The global power of English has helped the UK to grow and maintain its position as a cultural superpower – in arts, in academia, and more – with every chance of continuing to grow its soft power influence in today's highly networked world. In the 21st century, where content is king (as Bill Gates said back in 1996), creative, culture-rich English content has a growing and

highly receptive world market. And just as culture can create the space where individuals can express, explore and re-imagine difficult issues, so English as the common language aids dialogue, understanding, trust and the brokering of business deals.

Emerging economies and developing countries increasingly recognise the economic value of producing large numbers of skilled graduates able to communicate in English. Jobs, economic opportunity and wealth creation are critical to stability. Countries with a low proficiency in English have uniformly low levels of exports per capita. A focus on improved language skills, integrating English into the curriculum from the primary or even pre-school years, helps attract foreign investment, further increasing the need for English speakers; and a strong export sector in services helps create a middle class, strengthening spending and growing the national economy. In developed and developing countries alike, for the investor, the academic, the civil servant, the teacher, the performer, the politician, the secretary, the diplomat, the activist, the schoolchild, English creates opportunities otherwise impossible.



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The UK must continue to invest in English for the benefits, opportunities and value it brings to our trade, our culture and our people.

Emerging from a colourful history, thanks to its Darwinian capacity to evolve and adapt – and changing almost beyond recognition along the way – English has come of age as the ‘global common language’. Its seemingly irresistible spread, begun in past centuries but accelerating intensely in the past few decades, means that different varieties have emerged. It is constantly moulded and altered by new communities of users, whether geographic or digital. In this way it has come to belong to all its speakers – it no longer has a single centre such as the UK which influences its norms of usage, but instead has many centres and hubs around the world which individually and collectively shape its character. It is a global medium with local identities and messages, and this trend will continue as non-native speakers now far outnumber native speakers – already at an estimated ratio of 4:1, which can only grow. Our own forecast is for double digit growth in the demand for English in a swathe of large countries such as Indonesia, Pakistan, Brazil, Mexico and Nigeria.

But as English advances to become a key basic skill for millions around the world, the UK will need to invest in its own competitive advantage by sending more of its best and brightest young people out into the world to share and teach the language, to learn the languages, cultures and customs of others, and to bring their learning back to enrich our own culture.

For the UK, the English language is a critical component of trust building and, in turn, trade and prosperity. To maintain the ‘English Effect’ we must continue to nurture and invest in English for the benefits, opportunities and value it brings to our trade, our creative industries, our culture and our people. If we do not, we risk losing the economic, social and cultural value derived from one of the UK’s greatest assets.



# THE GLOBAL LANGUAGE

## THE EVOLUTION OF ENGLISH

English is the dominant international language of the 21st century. It is spoken at a useful level by some 1.75 billion people – a quarter of the world's population. As the language of communications, science, information technology, business, entertainment and diplomacy, it has increasingly become the operating system for the global conversation.

How did this happen? What does it mean?

Two qualities have been pivotal in the evolutionary rise of English: momentum and adaptability.

The momentum was originally provided by the political, military, religious and merchant classes. Through colonisation, ship-borne trade with the Americas, North Africa, the Indies and China, and the attendant role of Christian missionaries, the English language was exported worldwide. Arabic and Spanish spread similarly through conquest and religious conversion, across the Islamic world and the Americas, in parallel to the rise of English. But they did not adapt and adopt with the pace and flexibility of English.

Though the UK's political and military power was crucial in the 19th and early 20th centuries, the Louisiana Purchase<sup>1</sup> in 1803 was to prove of major significance. This established English as dominant over French in the United States; and then – as the UK's empire shrank in the 20th century – rapidly growing American global influence gave the language a momentum perhaps unique in modern history.

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'What seems to be happening is that those people who were once colonized by the language are now rapidly remaking it, domesticating it, becoming more and more relaxed about the way they use it – assisted by the English language's enormous flexibility and size, they are carving out large territories for themselves within its frontiers.'

**Salman Rushdie, *Imaginary Homelands* (Granta Books 1992)**

As English was spreading, it was also adapting and absorbing, soaking up vocabulary from elsewhere. Arabic, Spanish, Hindi and Malay words all found their way into the English lexicon through trade and colonisation, joining the contributions from a thousand years earlier of Old Norse and Norman French and, with the coming of the Renaissance, Latin and Ancient Greek. In the mid-19th century, the Industrial Revolution generated a variety of new words – a new technical lexicon – such as 'factory', 'steam-press', 'stethoscope': some of them returning to classical roots, others taking on simpler terms, to describe processes, concepts and artefacts that were either new or newly discovered.

The process continues and has intensified today – with many more scientific, technological and creative discoveries (and their patents and trademarks) now described and named in English when once they were introduced to the world in German and French. Words expand their meanings to cover new situations ('a computer mouse'); the language incorporates or creates new words to

express new concepts ('to email' or 'to google'). The only constant is change.

This globalisation of the language has led to a diverse range of 'Englishes', subtly different not just from a 'standard' English, but from each another. The European Commission<sup>2</sup>, for example, recognises that over the years, 'European institutions have developed a vocabulary that differs from that of any recognised form of English. It includes words that do not exist or are relatively unknown to native English speakers outside the EU institutions'. Along the way it provides a window into concepts that are common in one nation's bureaucratic tradition, but not others.

In his book *The Tipping Point*<sup>3</sup>, Malcolm Gladwell writes of 'The paradox of the epidemic: that, in order to create one contagious movement, you often have to create many small movements first.' In the free development of global English, the language has had many small movements: dialects that are the fittest for purpose and meet the needs of their users (such as EU officials) in context. Dialect is no longer restricted

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1. The Louisiana Purchase was the acquisition by the United States in 1803 of 828,000 square miles of France's claim to the territory of Louisiana, encompassing all or part of 15 present US states and two Canadian provinces.

2. European Court of Auditors, Translation Directorate (May 2013). *Brief List of Misused English Terms in EU Publications*.

3. Malcolm Gladwell (2000). *The Tipping Point: How Little Things Can Make A Big Difference*, New York: Little Brown.

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‘One of the main problems we have in building a more integrated European community is inadequate communication within Europe.’

**Joachim Gauck, President of Germany**

in its distinctiveness by region or place. It applies to social groupings; and we can see the development of distinct dialects in cyberspace and in mobile communications – just think of text language as one example – in parallel with the decline of regional dialects as our usage in the UK becomes more geographically homogenised.

### **TECHNOLOGY AND THE PACE OF CHANGE**

If English took hold due to the historic factors of trade, empire, military and industrial might in earlier centuries, technology has enabled it to jump the fence and to thrive without the physical contact which had previously been necessary. The growth of English, and the emergence of the internet as a global communication channel, are mutually reinforcing trends.

This lack of boundaries is important. Previously, the spread of language was governed by those physical encounters, then by the circulation of printed materials, then by radio, television, cinema and other mass media. The arrival of the internet and social media, with the potential for even wider reach, has meant that those languages with the greatest momentum and the most attractive characteristics and attributes, such as widespread usage, immediate applicability, well-regarded cultural ambassadors or accessible teaching and learning, have become the most successful channels of online communication and exchange.

The pace of change this generates is striking. Adaptations, corruptions and tailoring that had previously taken centuries now take only months. The Oxford English Dictionary added approximately 300 new words (BitTorrent, cybercast, paywall amongst them) to the lexicon in June 2012. Can English readily absorb this pace of change, or will it in some way lose ‘integrity’? Its trajectory is difficult to predict. Loan words and changes to structure have been enriching the language for the past 1,500 years – that much is not new. We now must be prepared not just to tolerate, but to confidently embrace the changes being wrought by instant global access, for online and social media usage will have a significant role to play in the next phase of the evolution of English. English has always evolved – and that is its great strength.

The extraordinary growth and speed of cross-cultural online communication, combined with the emergence of global English varieties, is creating a new dialect of English for the web: let us call it English 2.0, the unofficial language of the internet. Here, the rules of the language are relaxed, grammatical and structural purity have become far less important than flexibility and openness to change, and new loan words are put to immediate and global use. Those who use it can be immediately heard, seen, read and understood by far greater numbers than ever before.

### **THE ADVANTAGES (AND DISADVANTAGES) OF ENGLISH**

In the same way that a unified currency or an effective free trade agreement can facilitate ease of commerce, so a unified language code, or at least a common tongue, can aid dialogue, understanding, trust and the brokering of deals. Global English, or access to one of the many global ‘Englishes’, is a highly valued technical skill. It can be a prerequisite for many international positions, an asset in diplomacy, foreign relations and development, and a passport to advancement in the global media, entertainment and financial worlds.

Joachim Gauck, President of Germany, used a speech on Europe’s future<sup>4</sup> to call for English to be made the language of the European Union (as he appealed for the UK to stay in the EU). ‘One of the main problems we have in building a more integrated European community’, he stated, ‘is inadequate communication within Europe’. To encourage a greater sense of commonality, he argued, Europe needed a common language as well as encouraging multilingualism. ‘I am convinced that, in Europe, both can live side by side: the sense of being at home in your mother tongue, with all its poetry, as well as a workable English for all of life’s situations and all age groups.’

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4. To an invited audience at his official residence, Schloss Bellevue, Berlin, 22 February 2013.





For the UK today, English provides a strong competitive edge in fields as diverse as diplomacy, commerce, media, academia and IT. It means a place at the heart of a global network.

The economic incentive to learn English is compelling. An increasing number of companies – Nokia, SAP, Heineken, Samsung and Renault amongst them – have recognised the long-term advantages to productivity and growth that adopting English as a common company language can have. In a 2012 survey by the Economist Intelligence Unit<sup>5</sup>, 70 per cent of executives said their workforce will need to master English to realise corporate expansion plans, and a quarter said more than 50 per cent of their total workforce would need English ability.

For other sectors, the English language is an indispensable part of their offer. Loren Griffith, Director of the International Strategy team at Oxford University, sums it up in these terms: ‘Today most of the world’s best universities<sup>6</sup> are in English-speaking countries, and that is no coincidence. English has become the lingua franca of academia. This greatly increases UK universities’ ability to attract the world’s best to study and do research here, and to collaborate with the best located around the world. More international students study at UK universities than anywhere but the United States. Three central reasons are our tradition of rigorous training in how to think well, the chance to participate in

world-leading research, and the fact that this teaching and research happens in English.’

Other university systems acknowledge the centrality of English. Jean-Loup Salzmann, chairman of the Conference of French University Presidents, notes that ‘In any French medical laboratory, more than half the people speak only English. The evaluation of our research is in English, our European projects are in English, and when professors from abroad are welcomed to our universities, we speak to them in English.’<sup>7</sup> Indeed, the law requiring higher education instruction to be principally in French is now being modified in an attempt to reverse the decline in the number of foreign students at French universities.

Protestors involved in the uprisings in North Africa in 2011, whilst using French and Arabic to gain local and regional support, switched to English to influence the wider global community. One such activist, who had taken first to the streets and then to social media and the internet during the Libyan revolution, was asked why he had chosen English when Arabic had served him well on the streets. His answer was clear and concise: ‘Because that’s where we go when we want to influence the world.’ And here is a

trainee teacher in China reflecting on her motivations for learning the language: ‘We use English as an international language because so many people in so many countries speak English. Though there are so many people that speak Chinese, just the people in China speak Chinese. I think that English as an international language is natural.’

For the generation soon to inherit influence in commerce, politics, media and cultural life, ‘connectedness’ is a major priority; technology is the vehicle that they have chosen; and English is increasingly the fuel on which it will run.

It is clear that what we currently think of as the ‘English-speaking world’ will eventually lose effective control of its ‘own’ language. ‘If there is one predictable consequence of a language becoming a global language,’ writes the eminent academic David Crystal<sup>8</sup>, ‘it is that nobody owns it any more. Or rather, everyone who has learned it now owns it – “has a share in it” might be more accurate – and has the right to use it in the way they want.’ There is therefore a job to be done. There is a need for high-quality teaching of English even more than ever, if not to protect the purity or integrity of the language, then to ensure that the diverse dialects that are being allowed to flourish are clear about the source code from which they are diverging and share enough common elements to ‘interoperate’ as a global operating system.

5. Economist Intelligence Unit (2012). *Competing across borders: How cultural and communication barriers affect business*.

6. THES: [www.timeshighereducation.co.uk/world-university-rankings](http://www.timeshighereducation.co.uk/world-university-rankings)

7. The Times, 22 May 2013 ‘Use of English in French universities is a cause célèbre’.

8. David Crystal (2003) *English as a Global Language*. Cambridge University Press.

For the UK today, English provides a strong competitive edge in fields as diverse as diplomacy, commerce, media, academia and IT, and helps it to play a major global role as a cultural superpower. It means a place at the heart of a global network, predicated upon nuance, ease of understanding, trust and trade, and where it gives the UK a big advantage in the global soft power stakes.

Soft power is rooted in attraction, exchange and the building of cultural relationships across borders, much of it unmediated by governments. This requires communication, exchange and an interest in different cultures. This in turn is fraught with the dangers of misinterpretation, misperception, false assumption and insensitivity. In the building of stronger cultural ties, some shared understanding and mutual respect are key elements, and these are greatly enabled by a common language.

Yet the UK should not be complacent. Despite its strength as the most common global language, the vast majority of the global population do not speak English and other languages such as Spanish, Arabic and Mandarin are increasingly in demand.

An international trade business survey by the British Chambers of Commerce in 2012<sup>9</sup> – to which over 8,000 businesses responded – specified a number of obstacles to export growth. Over one in five businesses identified a language deficit as one of these; up to 96 per cent of respondents had no foreign language

ability for the markets they served; and the largest language deficits were for the fastest-developing markets. Only 0.4 per cent of business owners reported that they were able to speak Russian or Chinese well enough to conduct business deals in their buyers' language. The report called for a fundamental reappraisal of the importance of language learning to the UK's future competitive position and business success, and recommended that foreign languages be re-established as core subjects within the UK national curriculum and in workplace training. The British Academy<sup>10</sup> has added its voice to the debate, providing evidence that the UK is suffering from a growing deficit in foreign language skills at a time when global demand for such skills is expanding. It argues that much more needs to be done to tap the supply of multilingual skills within UK society, and to ensure our education system is equipped to support the UK's aspirations for growth and global influence.

In not embracing the widespread learning of other languages, those who rely exclusively on English deny themselves access to other cultures through the vital entry point of their language. The writer and researcher David Graddol<sup>11</sup> has warned that monoglot English graduates face a bleak economic future: qualified multilingual youngsters from other countries are proving to have a competitive advantage over their British counterparts in global companies and organisations. Scott L. Montgomery<sup>12</sup>, writing of scientific research, warns that

the real casualty from the global spread of English may actually be the native speaker: 'The rest of the world will have access to everything s/he does, but s/he will have access to little or nothing beyond the edges of his own tongue.'

## THE GLOBAL DEMAND

The new growth markets for English are largely outside the traditional countries of the developed world. China and India show an enormous scale of demand, whilst being quite different in terms of demographic change and educational culture. However, it is in the tier of large countries below these giants where the most astonishing growth is forecast. The British Council forecasts at least double digit growth – in some cases up to 40 per cent – in demand for English in Indonesia, Pakistan, Brazil and Mexico, as well as the large African countries, particularly Nigeria, Ethiopia and Sudan. The growth in the demand for English is closely related to one particularly important dimension of globalization: the trend towards increased urbanisation. A Euromonitor report for the British Council says 'Up to 18 million Nigerians are expected to move to urban areas over 2009–2015. Urban dwellers have far higher levels of exposure to English, and are also better placed for access to schools than their rural counterparts.'<sup>13</sup>

Elsewhere, the Russian government has stated that fluent English will in future be a requirement to become a civil servant. In Vietnam, English has become

9. British Chambers of Commerce (2012) *Exporting is Good for Britain: Skills*.

10. British Academy (2013) *Languages: The State of the Nation*.

11. David Graddol (2006) *English Next: Why global English may mean the end of 'English as a Foreign Language'*. British Council.

12. Scott L. Montgomery (2013): *Does Science Need a Global Language? English and the Future of Research*. University of Chicago Press. Interviewed in [www.insidehighered.com](http://www.insidehighered.com) 4 June 2013.

13. Euromonitor International (December 2010) *The Benefits of the English Language for Individuals and Societies: Quantitative Indicators from Cameroon, Nigeria, Rwanda, Bangladesh and Pakistan*.

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‘If I have to summarise the meaning of the English language in one word then it has to be freedom. Freedom to relate to others, explore new cultures, freedom of information, to do what I want to do for a living and live in a place I love ... English has opened my horizons in every sense of the words and I owe who I am today to the ability to speak the language.’

**Francisco Rodriguez-Weil, set and costume designer, Venezuela**

compulsory from the fourth grade and it is now compulsory in all Japanese primary schools. The government of Thailand has set the ambitious goal of teaching English to 14 million students in 34,000 state schools, from pre-primary to university age; and the Kazakhstan government says 30,000 more English-speakers will be needed for Expo 2017, an international exhibition on sustainable energy to be held in Astana.

In the newest states, English can have a special role in nation building. When South Sudan gained independence from Sudan in 2011, English was announced as the new national language of unity.

As a result, native-speaker teachers are in increasing demand around the world. Although there are some 12 million English teachers active in the world today, this masks a huge global shortage.

But ways of learning are changing – the face-to-face classroom is being supplemented by the virtual world, broadcast media, and the mobile phone. UK providers are in competition with companies from around the world for this market, which is likely to triple in size in the major markets mentioned above, as well as in the traditional markets of Europe and the developed economies of the Far East. The global market for digital English language learning products and services reached \$1.31 billion in 2011. The worldwide five-year compound annual growth rate (CAGR) is 14.5 per cent and revenues will reach \$2.58 billion by 2016. But high quality English teaching – whether face-to-face, ‘blended’ or virtual – will still need real teachers, and the international employment opportunities for talented British graduates remain substantial.



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‘My mother tongue is Kurdish, which is banned; so I write my poetry in my second language, Turkish. I have therefore always had a very traumatic relationship with Turkish. That is not the case with English. English is like a break I have been offered to somewhat alleviate the burden of the life I am living. It is a break to take a breath and rest. Something would have been missing in my life if I didn’t speak English.’

**Bejan Matur, writer, Turkey**

# HOW ENGLISH IS CHANGING LIVES

English has developed as a global language for a range of reasons, many of them historical, rather than anything intrinsic in the language itself. The enormous irregularities in the English system of spelling, for example, may often be seen by a newcomer as a disincentive. Millions, however, are undeterred. One of the strongest incentives for learning the language is the use to which it can immediately be put, socially, economically and culturally.

From education and the creative economy to IT and advanced engineering, industries in the UK benefit hugely from using the English language. But it also helps economies overseas to prosper. English language skills provide life-changing opportunities, and promote prosperity and security around the world – to the extent that development efforts have now become ‘inextricably linked in governmental and academic circles as well as in the media with English language education’<sup>14</sup>. Research in countries in the Middle East and North Africa suggests that the need to widen the scope of domestic industry and also attract more inward investment by multinationals is fuelling the fast-growing demand for improved English education. It is also clear that reducing unemployment as a means of securing political stability is an imperative for many of these countries.<sup>15</sup>

One of the most noteworthy initiatives has been in Algeria, where after decades of strict state control of the education system, the government began to open the door to private

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‘English language skills are an indispensable tool for daily communication with most of the outside world, either in my professional or personal life. Through English I was not only able to assemble a vast professional network spanning around the globe, including China and Japan, I was also able to meet and get to know very inspiring personal friends around the region and in other, very different countries in Europe. It is vitally important that I am able to speak English; as important as being able to speak at all.’

**Vladimír Vano, Chief Analyst, Volksbank Slovensko AS, Slovenia**

provision in 2008. Consumer demand for these schools is solid, as private education institutions are perceived to offer better-quality English tuition than public alternatives.

At an individual level, the discernible relationship between English proficiency and gross national income per capita is a virtuous cycle: ‘Improving English skills (drive) up salaries, which in turn give governments and individuals more money to invest in English training ... improved English skills allow individuals to apply for jobs and raise their standards of living.’<sup>16</sup> In India, for example, hourly wages are on average 34 per cent higher for men who speak fluent English and 13 per cent higher for men who speak a little English, relative to men who do not speak English.<sup>17</sup>

Research by Euromonitor International<sup>18</sup> on the benefits of English in five countries, Cameroon, Nigeria, Rwanda, Bangladesh

and Pakistan, noted that ‘Education is a long-term investment for each government, but a citizen’s individual ambition is the prime motivator. Interviews with companies indicate that individuals regard education as the best way to escape poverty, and believe that learning English in particular offers great opportunities for career advancement.’

Thus, individuals seeking to learn English do so not only because it is an enriching second language, or because it is a rewarding pastime. More usually they learn because it affords access. It allows a young woman in Pakistan to communicate with a professor in the US, a farmer in Ghana to get international weather reports and commodity prices via his mobile phone, or a student in Myanmar to share hopes and aspirations with community organisations in Belfast



continues on page 12

14. Paul Bruthiaux. *Hold your courses: Language education, language choice, and economic development*. TESOL Quarterly 36(3).

15. Euromonitor International (May 2012). *English Language Quantitative Indicators: Morocco, Algeria, Tunisia, Egypt, Jordan, Lebanon, Iraq and Yemen*.

16. United Nations. GNI per capita PPP (\$), 2011. Gross national income converted to international dollars using purchasing power parity rates. Quoted in *EF English Proficiency Index 2012*, [www.ef.com/epi](http://www.ef.com/epi)

17. British Council (2009). *Project English*.

18. Euromonitor International (December 2010) *The Benefits of the English Language for Individuals and Societies: Quantitative Indicators from Cameroon, Nigeria, Rwanda, Bangladesh and Pakistan*.



One of the strongest incentives for learning the language is the use to which it can immediately be put, socially, economically and culturally.

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‘Really I wouldn’t have had a proper professional career without the English I learnt, and I think that really I owe that to my parents who had the vision to force me to study English on top of my normal schooling from a very early age.’

**Paloma Escudero, Global Director of Communications, UNICEF**



or Sarajevo. More prosaically, English allows football fans in a fishing village in the Gambia to listen to live Premier League commentary, or those with the resources to do so to travel across borders, knowing that they will find a way to be understood more readily. It affords access not to a linguistic club, but to a global conversation. Research in the Middle East and North Africa shows that one of the most important factors influencing the demand for English is young people’s eagerness to take part in online social networking – which is primarily conducted in English.<sup>19</sup>

‘I think it’s absolutely transformative in terms of giving people access to improved livelihoods’, says Tony McAleavy, Education Director of CfBT Education Trust which works extensively abroad. ‘Quite apart from the extraordinary range of social or cultural benefits that come from education. We work in a lot of low-income countries and the kids who’ve got great English have got radically improved life chances. We’ve done some work, for example, in a remote rural part of the UAE, and we met up with some parents and asked them about what it was they wanted to improve in terms of their local schools.

We weren’t asking them about English, we were asking them generally what they wanted to improve about their schools, and these were very traditional Bedouin families and top of the list was English because they know it’s hugely important in terms of the kind of jobs their kids are going to get.’

Interviews with English language students in six cities (Muscat, Cairo, Rome, Madrid, Kuala Lumpur and Ho Chi Minh City) reveal the range of ways in which courses impact on their lives – an impact that goes beyond the obvious linguistic goals of accuracy and fluency.<sup>20</sup> Studying English, they reported, enabled them to be more competitive in the job market and to move up the career ladder. It provided access to undergraduate and postgraduate courses, either in their countries or overseas, and to work-related professional development courses. It enhanced their ability to engage with the internet and social networking sites. This in turn increased their ability to access information, work more efficiently, and cultivate friendships with people around the world, and allowed enhanced access to unbiased news about world events.

A common view, therefore, was that English is a liberating force. It is also worth noting the role that English language courses, and in particular teachers’ behaviours and attitudes, can have in building positive perceptions of the UK.

The 1994 genocide left Rwanda with a severe skills shortage after many professionals either fled the country or lost their lives, and English is crucial in Rwanda’s development and participation in the global economy. In 2009 the government announced an ambitious plan to switch the country’s entire education system to English: a huge undertaking in a country where more than 95 per cent of schools teach in French to pupils from about the age of nine, alongside the indigenous Kinyarwanda. Thousands of teachers are already being taught English as schools begin a rapid switchover to using the language for tuition in a few core subjects. The intention is to change the entire system within a few years and raise a generation of Rwandans fluent in English, strengthening the country’s ties to its English-speaking east African neighbours, including Uganda, Kenya and Tanzania, with which it does much of its trade.

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19. Euromonitor International (May 2012) *English Language Quantitative Indicators: Morocco, Algeria, Tunisia, Egypt, Jordan, Lebanon, Iraq and Yemen*.

20. Simon Borg (July 2009), Centre for Language Education Research, University of Leeds: *The impact on students of British Council teaching centre EFL classes*.

21. Ms Kalimba and Professor Khan were speaking at a Commonwealth Institute seminar in London in 2012 on the importance of English for development.

22. Annika Hohenthal. *The Power of English: the Case of India*. [www.postcolonialweb.org/india/hohenthal/contents.html](http://www.postcolonialweb.org/india/hohenthal/contents.html)

23. David Graddol (2010). *English Next India: The future of English in India*. British Council.

Ms Kalimba's views of the importance of English were echoed by Pakistan's Professor Saeeda Asadullah Khan, Vice-Chancellor of Fatima Jinnah Women's University: 'English has a major role to play in terms of determining Pakistan's position within the context of a developing nation and to build up its knowledge economy', she said<sup>21</sup>.

In India, English was first used as a tool of power to cultivate a group of people who identified with the cultural and other norms of the political elite. It provided a medium for understanding technology and scientific development, and by the 1920s had become the language of political discourse, intra-national administration, and law.<sup>22</sup> Tellingly, it also became the language of nationalism and

political awakening: Gandhi, a staunch opponent of the adoption of English, struggled to create a consensus for an acceptable alternative and expressed his message to the elite in English.

For a variety of reasons, India has nevertheless chosen to adopt and maintain English as the secondary official language of the country, after Standard Hindi. Successive governments have seen the advantages of this position, at the individual, community and international level and English is now spoken by approximately 100 million Indians. (According to the 2001 census, 258 million speak Hindi and a further 30 indigenous languages are spoken by more than a million native speakers). David Graddol<sup>23</sup> identifies three main

drivers of this growth: education (increasing demand for English-medium schools, widening access to higher education, incorporation of English training in vocational education); employment (many jobs in the organised sector now require good English skills); and social mobility (English is seen as an access route to the middle classes and geographical mobility within India and beyond).

For the investor, the academic, the civil servant, the teacher, the performer, the politician, the call centre worker, the diplomat, the activist, the schoolchild, English opens the door to opportunities inconceivable without it.

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'English, to me, is the international language of dance. The English language has allowed me to communicate all over the world with artists, designers, composers, teachers, fellow dancers and choreographers and has been essential to initiating and developing both my professional and personal relationships.'

**Tamara Rojo, Artistic Director, English National Ballet**



# THE ECONOMIC BENEFIT

The 'Global Ranking of the Publishing Industry'<sup>24</sup>, a Livres Hebdo research project, highlighted that while the US may be dominant in trade publishing, UK publishers punch significantly above their weight when it comes to academic and scholarly publishing. Indeed the top five UK companies included in the rankings – Pearson, Reed Elsevier, Informa, Oxford University Press and Cambridge University Press – accounted for €13.39 billion, nearly a quarter of total global publishing revenues.

Asia is now the fastest growing market for many publishers' English language content. Demand in rapidly developing countries such as China, Indonesia and Malaysia reflects the high status these societies place on education and particularly English language learning and the research singles out these two sectors as areas of significant growth.

Grant Glendinning, Director of the Centre for Lifelong Learning at City and Islington College, identifies English as a critical deciding factor in the minds of those students who are able to make choices about where, how and in what medium they want to gain higher qualifications. 'The potential for the UK to play a role in meeting the education and skills demands of the changing world is only just being realised, and with the UK as the birthplace and the historical and cultural home of English, many students cite that as the reason they choose the UK over other English speaking countries in which to continue their studies.'

ORIGIN OF ENGLISH LANGUAGE STUDENTS IN THE UK	
1. Italy	15. Germany
2. Spain	16. Rest of the World
3. Rest of the Middle East	17. Thailand
4. South Korea	18. Taiwan
5. Rest of Europe	19. Rest of Central America
6. Saudi Arabia	20. Rest of the Far East
7. Brazil	21. Mexico
8. Turkey	22. Venezuela
9. France	23. Austria
10. Russia	24. Poland
11. Colombia	25. Czech Republic
12. China/Hong Kong	26. Sweden
13. Switzerland	27. Argentina
14. Japan	

Source: English UK, 2011 annual return statistics from 368 private sector member schools.

Each year over 600,000<sup>25</sup> international students from 200 countries come to study at universities, colleges and boarding schools in the UK and a further 600,000<sup>26</sup> come to do a short English language course. In 2011, they contributed the lion's share of the UK's £17.5 billion education-related export market<sup>27</sup>, helping institutions, cities and communities throughout the UK to thrive. Analysis by London Economics<sup>28</sup> suggests that the value of that market might be approximately £21.5 billion in 2020 and £26.6 billion in 2025 (both in 2008–09 prices). This excludes the potential impact of tuition fee increases and student visa rules, both of which

are likely to have a long-term impact on the value of education exports.

## THE DOMESTIC ELT INDUSTRY

The UK's ELT industry has grown by 34 per cent since 2000 and is currently worth over £2 billion annually to the UK economy. This figure is expected to rise to nearly £3 billion by 2020.

In 2011, the UK had the largest share of English language students studying outside their home country, with almost 50 per cent of students by volume and 35 per cent of the global market by value<sup>29</sup>.

24. <http://wischenbart.com/booklab/?p=427>

25. Source: Higher Education Statistics Agency (HESA), UKCOSA and others

26. London Economics (June 2011) BIS Research paper No.46: Estimating the Value to the UK of Education Exports.

27. Department for Business, Innovation and Skills (2013). *International education: global growth and prosperity*. BIS/13/1081.

28. London Economics (June 2011) BIS Research paper No.46: Estimating the Value to the UK of Education Exports.

29. Department for Business, Innovation and Skills (2013). *International education: global growth and prosperity*. BIS/13/1081.



The £2 billion spent on ELT (which includes tuition fees, accommodation and day-to-day expenses) was well spread across the UK. The top 15 towns and cities were:

£ in 2010	
1. London	<b>£771,454,897</b>
2. Bournemouth	<b>£150,159,468</b>
3. Brighton and Hove	<b>£121,982,664</b>
4. Oxford	<b>£96,977,876</b>
5. Cambridge	<b>£89,414,405</b>
6. Edinburgh	<b>£69,562,230</b>
7. Manchester	<b>£67,963,916</b>
8. Canterbury	<b>£31,876,972</b>
9. Leeds	<b>£28,513,618</b>
10. Bristol	<b>£24,432,439</b>
11. Glasgow	<b>£21,210,270</b>
12. Eastbourne	<b>£18,962,245</b>
13. Norwich	<b>£18,201,976</b>
14. Portsmouth	<b>£17,565,035</b>
15. Sheffield	<b>£17,024,787</b>

Source: Department for Business, Innovation and Skills (BIS) and English UK, 2011

However, Tony McAleavy of CfBT sees this £2 billion as ‘a drop in the ocean’ in terms of the wider economic benefit to the UK that comes from our association

with the English language. ‘You’ve got at the heart of it a business focusing on the teaching of English, but every British company, for example of a scientific or technical nature, has got an advantage in selling its products and services because it speaks English to people who want to talk professionally in English.’

He notes also the complex range of different types of English teaching services for which there is a growing demand. ‘It’s not just the obvious service in terms of, say, teaching kids English. In Brunei, for example, we work with the local airline company on aviation English. There’s a big market for technical English associated with particular vocations and particular professions. In another context we’re helping schools in the Middle East so that they can teach maths and science through the medium of English. This bringing together of the maths pedagogy and the English content is a growing niche in terms of the global market. So it’s a complex market as well as a growing market.’

### THE BRAND VALUE OF ENGLISH

The English language creates an easier environment in which the UK can do business, and it fuels a booming English teaching industry, with much of the earnings going directly into local and regional economies around the UK. But can you put a value on something we use every day without even thinking?

The consultancy firm Brand Finance estimates that the full, long-term economic benefit to the UK through the use of English, in both international trade with English-speaking countries and in the domestic UK economy, is £405 billion. The Intellectual Property asset value is £101 billion.<sup>30</sup> This latter figure represents what a (theoretical) licensor would charge the UK for continued use of the English language in international trade with English-speaking countries and within the domestic economy.

Inevitably these figures prompt as many questions as they answer – how can you place a value on a global good? But the methodology which Brand Finance uses is applied daily to intangible assets and is suggestive of the enormous – and substantially hidden – benefit to the UK which English brings. As was recently said of soft power by a UK cultural commentator<sup>31</sup>, ‘It’s like good health, something you only really appreciate in its absence.’ The same is true of English. Recent research by the British Council shows that the ability to speak English has a major positive impact on people’s interest in business opportunities with the UK, in wanting to visit the UK and in wanting to study in the UK.<sup>32</sup> Sustained investment in meeting the world’s currently insatiable appetite for English is one of the best investments UK plc can make in our trading, creative and cultural future.

30. These figures are arrived at using an approach known as the ‘Royalty Relief Methodology’, commonly applied to commercial brands for the purposes of technical valuations (for example, in tax disputes). It uses publicly available financial information – in this instance, financial figures from the Office for National Statistics and softer measures from various studies in the public domain. It relies on verifiable third party data (licensing agreements – where appropriate) and therefore less judgment is involved than other methods.

31. Dorian Lynskey, *The Guardian*, 19 June [www.theguardian.com/commentisfree/2013/jun/19/britain-soft-power-greater-gangnam-style?INTCMP=SRCH](http://www.theguardian.com/commentisfree/2013/jun/19/britain-soft-power-greater-gangnam-style?INTCMP=SRCH)

32. British Council (2013). *Culture Means Business*. See also British Council (2012). *Trust Pays*.

# CONCLUSION AND RECOMMENDATIONS

English is now spoken by a quarter of the world's population, enabling a true single market in knowledge and ideas. Non-native speakers now substantially outnumber native speakers and as a result, English increasingly belongs to the world rather than to any one country.

English has huge economic value – for the UK it supports trade and exports around the world and a thriving ELT sector at home. It provides a significant competitive advantage in everything from soft power to commerce, to the media, to universities and academia; and delivers a ready and growing global market for the UK's impressive cultural industries. It is a critical component of trust building and, in turn, trade and prosperity.

Around the world there is enormous demand and need for English in the state and public education systems, especially in developing economies. The UK is uniquely placed to support the development of high quality English teaching. This is the right thing to do to support improved prospects for countries and individuals in low and middle income countries, but also in the long term it will help to build closer relationships with the UK as well as growing the market for UK goods and services.

The UK should respond to this global demand by attracting even more of our brightest and best young people into teaching English around the world.

But we should not stop there. We must always remember that English is not enough for UK young people and that the learning of other languages must be a much higher priority in the future. If we are to maintain our position at the heart of the global network and as a major cultural and economic presence, we must learn from, and share more and more with, other cultures and countries.

Taken together, and allied to continuing support for the competitive strengths of our education system and our cultural and creative sector, this mixed economy of investment and reciprocity will enhance the UK's global attraction and influence.

## RECOMMENDATIONS

1. The UK should recognise the significant contribution of its dynamic and entrepreneurial ELT sector and do more to support its growth. A strategic and joined-up approach to market development and intelligence, involving government and the private sector, should be encouraged.

2. The UK should use its huge strengths in English teaching, curriculum development and assessment to enable low and middle income countries around the world to improve the provision of English in public education systems.
3. More should be done to encourage and enable the brightest and best young people from the UK to explore opportunities to teach English around the world.
4. There is an urgent need for a step-change in foreign language learning amongst young people in the UK, ensuring that we continue to learn from and engage with people from other countries and cultures.



**Emerging economies and developing countries increasingly recognise the economic value of producing large numbers of skilled graduates able to communicate in English.**

# THE BRITISH COUNCIL: SHARING THE BENEFITS OF ENGLISH

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The British Council helps millions of people around the world to learn English as a central part of its work for the UK. No organisation does more, in more places, to share the benefits of the English language with the world.

Our work in English is about delivering benefit to the UK, raising the profile of UK expertise around the globe and reinforcing the UK's position as the home of the English language. A wider knowledge of English also helps UK and other businesses who want to export or invest internationally.

Our research shows that, worldwide, those who speak English are more likely to trust the UK, visit and study in the UK, and be interested in doing business with the UK.

We teach English face-to-face in 60 countries worldwide, and reach hundreds of millions with our LearnEnglish websites for adults, children and teens, with wind-up MP3 players in Africa and via radio and with the BBC World Service.

We work with state and national governments, especially in developing countries, to improve English in state education. We also develop scale and excellence in our large-scale teaching operations in Western Europe, Asia, the Middle East and North Africa which are self-funding with no cross-subsidy from UK taxpayers.

The resources we create in these larger operations enable us to reach and teach English in places few other organisations could – in conflict zones and developing countries like South Sudan, the nations of Sub-Saharan Africa and South Asia, the Middle East and North Africa; and in vital world institutions such as Egypt's Al-Azhar University, military colleges and civil service academies.

We will also be supporting millions more learners via the improvements in public education systems which we are helping to achieve, such as 'Project English' in India. This has benefited more than 27 million young learners across the country, and brought opportunities for professional development to more than 650,000 teachers.

We are working in partnership with Intel® Corporation to place 100 million PCs and devices featuring British Council LearnEnglish content in classrooms and homes in 100 countries.

We are working with Russia's 200,000 English language teachers, policy makers and other professionals to improve the quality of English teaching – particularly in the state sector, where English is taught to an estimated 15 million learners in more than 60,000 schools.

We opened our office in South Sudan in 2011, as soon as the country was established. We have been supporting the development of the South Sudan Police Service for many years, through professional development and English training. We are bringing English language tuition to public servants, including many former combatants, helping them to move from conflict to public service.

We accredit half the UK's English language schools, promote the UK as a destination for English students, work with teachers of migrants in the UK, and run a programme of events for the UK's ELT sector.

The UK ELT sector is worth £2 billion annually and we promote UK English teaching providers through recruitment agents overseas, by attending trade fairs and by producing promotional material, working in partnership with the sector wherever we can to raise the profile of British ELT and qualifications. Our provision of UK exams and qualifications are worth £60 million in export earnings for UK exam boards.

We have launched a professional development framework for English teachers across the Western Balkans, working in partnership with Ministries of Education.

We are working with the South African government to launch a qualification in primary school English teaching as part of a national strategy to teach English as a first additional language. This will support English learning for 25,000 schools, 400,000 teachers and 12 million learners.

In Pakistan we have launched a three-year initiative to improve the skills of 350,000 Punjabi English teachers – 25 per cent of the teaching force.

Our team in Finland has established a major global partnership with Nokia which aims to bring English language services to nine million mobile phone users worldwide by 2015.

Backed by €1.1 million of EU funding, we have signed an agreement with the Ministry of Education of Saxony-Anhalt for a three-year programme to train 1,500 English language teachers. This programme will also create long-term closer links between UK and German language teachers and schools.

In Thailand we have set up a new English language assistant scheme with the Ministry of Education. This will give international work experience to over 700 UK undergraduates next year. We are also providing English learning apps on government-issued tablets to 800,000 primary school pupils.

Our entrepreneurial approach is not just about earning but also about finding innovative ways to create greater impact on a larger scale than we ever could with public funds alone. We do this by working with overseas governments to support policy change, with partners whose skills, resources and contacts help us to do more than we could do alone, and through digital channels which allow us to reach more and more people in new and innovative ways.





The English Effect exhibition on which this publication is based ran from April to June 2013 at the British Council's headquarters in London, before touring British Council centres around the world.

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‘As English was spreading around the world, it was also adapting and absorbing, soaking up vocabulary from elsewhere.’

**From Japanese:** sushi (1893), judo (1888), kimono (1886), geisha (1887), karate (1955).

**From Chinese:** lychee (1588), ginseng (1654), tao (1704), ketchup (1711), feng-shui (1797), kow-tow (1804), (via other languages) tea (1655).

**From Malay:** sago (1555), gong (c.1600), orangutan (1699), satay (1934).

**From the languages of South Asia:** curry (1598), pukka (1619), shawl (1662), bungalow (1676), dungaree (1696), shampoo (1762), jungle (1776), nirvana (1801), pyjamas (1801), chutney (1813), poppadom (1820).

**From Arabic:** hashish (1598), madrasa (1616); (via other languages) magazine (1583), giraffe (1594), couscous (1600), sequin (1613), alcove (1655), artichoke (1531), coffee (1598).

**From the languages of the Americas:** (mostly via Spanish) cocoa (1555), iguana (1555), potato (1565), papaya (1598), chocolate (1604), tomato (1604), chilli (1662), barbecue (1697), puma (1771), coyote (1824).

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