



EF EPI

EF English Proficiency Index

www.ef.com/epi

Executive Summary

English is the primary tool for international communication today. In a world where global integration is the norm, such a tool is necessary for larger portions of the population in more diverse situations than ever before.

For the entrepreneur, the executive, the researcher, the public servant, but also for the teacher, the programmer, the secretary, the student, English opens access to resources and opportunities inconceivable without it. No skill since literacy has held such vast potential to increase efficiency and improve the earning power of so many. The impact of English on the global economy is undeniable.

We have tested the English skills of hundreds of thousands of adults in countries around the world. Our analysis of these test results is presented in this second edition of the EF English Proficiency Index (EF EPI). Highlights of our findings include:

- English is a key component of economic well-being, both nationally and individually. Better English proficiency goes hand in hand with higher incomes, more exports, an easier environment for doing business, and more innovation.
- English skills flourish at the crossroads. Those who do business abroad, work in multinational environments, or use the internet already speak English.
- Careful planning, correctly aligned goals, and adequate investment are necessary to teach English to a high level in schools.
- Women speak English better than men worldwide and in almost every country.
- Young professionals, aged 25-35, speak the best English of any group. They need English to get along in a modern workplace. Students exiting secondary school often do not have sufficient English to function effectively in such a working environment.
- Industries that work globally, like tourism and consulting, are the best at English. Nationally focused industries employ those with weaker English skills.
- Europe's English is the best of any region, but some European countries need to get serious about teaching English to a high level if they are to keep up with their neighbors.
- Despite having some of the best-performing school systems in the world, Asian countries are not educating their children to a high level in English. Countries where English is an official language have only slightly higher proficiency than others in the region.
- The Middle East, North Africa, and Central and South America have uniformly poor levels of English, despite reasonable levels of spending on education.
- Emigration to an English-speaking country is no guarantee of attaining English fluency. The level of general education and English skills prior to emigration, as well as access to education after arrival, seem to be key mitigating factors.

EF English Proficiency Index 2012



Very High Proficiency

Rank	Country	EF EPI
1	Sweden	68.91
2	Denmark	67.96
3	Netherlands	66.32
4	Finland	64.37
5	Norway	63.22

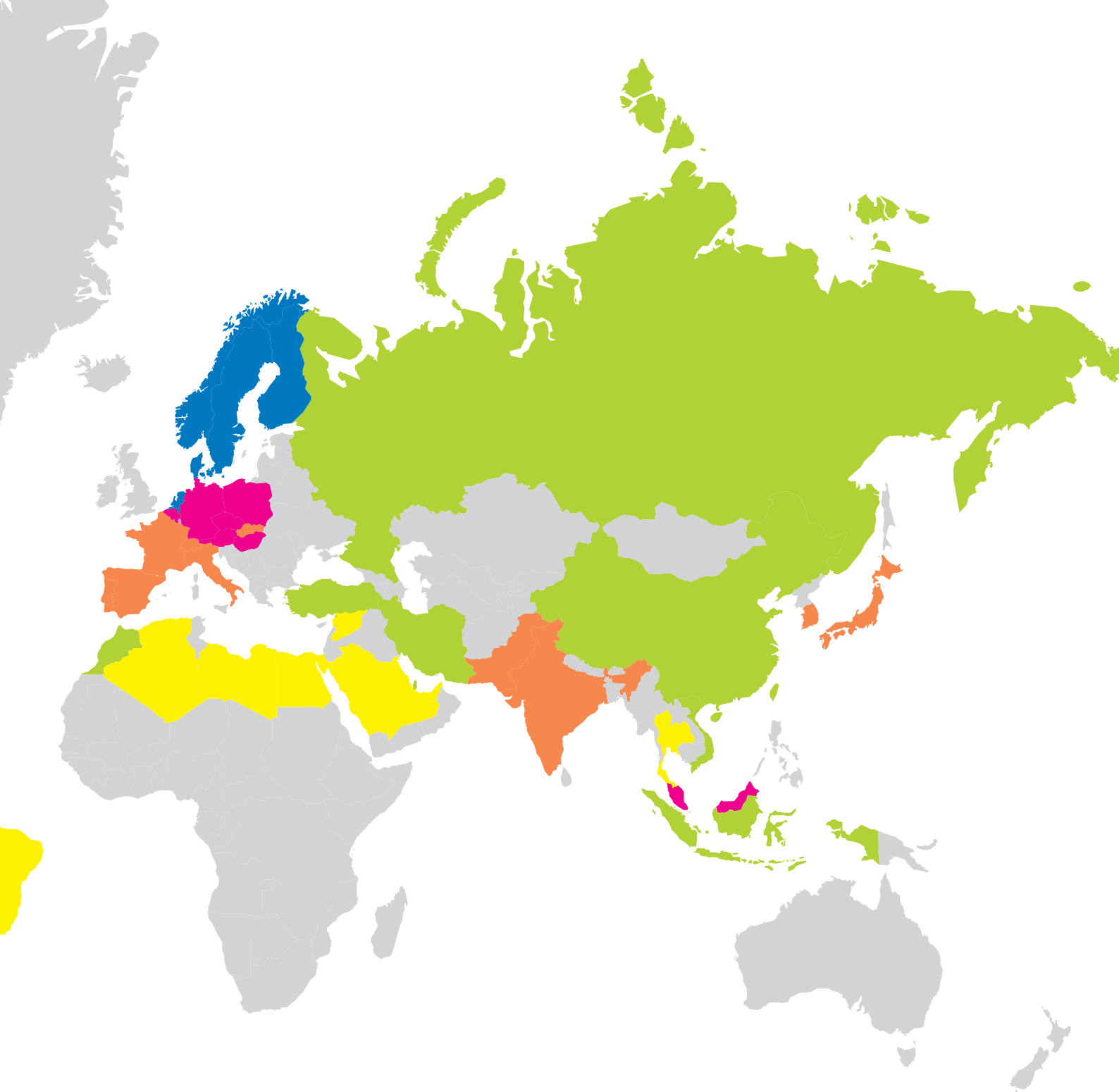
High Proficiency

Rank	Country	EF EPI
6	Belgium	62.46
7	Austria	62.14
8	Hungary	60.39
9	Germany	60.07
10	Poland	59.08
11	Czech Republic	58.90
12	Singapore*	58.65
13	Malaysia*	57.95

Moderate Proficiency

Rank	Country	EF EPI
14	India*	57.49
15	Switzerland	57.39
16	Slovakia	56.62
17	Pakistan*	56.03
18	Spain	55.89
19	Portugal	55.39
20	Argentina	55.38
21	South Korea	55.35
22	Japan	55.14
23	France	54.28
24	Italy	54.01
25	Hong Kong*	53.65

*Countries where English is an official language



Low Proficiency

Very Low Proficiency

Rank	Country	EF EPI
26	Uruguay	53.42
27	Indonesia	53.31
28	Iran	52.92
29	Russia	52.78
30	Taiwan	52.42
31	Vietnam	52.14
32	Turkey	51.19
33	Peru	50.55
34	Costa Rica	50.15
35	Morocco	49.40
36	China	49.00
37	Qatar	48.79
38	Mexico	48.60

Rank	Country	EF EPI
39	Chile	48.41
40	Venezuela	47.50
41	El Salvador	47.31
42	Syria	47.22
43	Ecuador	47.19
44	Algeria	47.13
45	Kuwait	47.01
46	Brazil	46.86
47	Guatemala	46.66
48	Egypt	45.92
49	United Arab Emirates	45.53
50	Colombia	45.07

Rank	Country	EF EPI
51	Panama	44.68
52	Saudi Arabia	44.60
53	Thailand	44.36
54	Libya	42.53



SYDNEY

Introduction

The world is learning English

Every year, more and more speakers of other languages are learning English. This increase is driven by many factors, not least world population growth. In the school sector, English study is expanding through the introduction of English lessons for younger pupils, the extension of the number of years of required schooling, increasing school attendance rates, and the application of curriculum reform requiring all students to study English. Universities also contribute by adding English language requirements to existing degree programs and introducing English-only curricula.

In addition to all the young people learning English at school, the private English instruction sector is booming. In many countries, working adults receive English language training either directly from their employers or through employer funding schemes for lessons they organize themselves. Unemployed adults are encouraged to enroll in English training to improve their employability. Public sector employees are increasingly asked to attain minimum English levels as a job requirement. Access to the internet and mobile technologies continue to expand the variety of learning methods, plugging learners in to vast pools of English learning materials, as well as unlimited English language media and social networking with native speakers. The British Council has forecast that by 2020 two billion people will be actively learning English.

How well are they learning?

Yet despite the time, money, and energy poured into teaching people English, there is little evaluation of the return on these investments across society as a whole. We continue to emphasize grammatical accuracy and memorization over fluency.

Compounding these outdated expectations, many countries suffer from a dearth of qualified English teachers in the public sector. Some resort to recruiting native English speakers from abroad, often at a steep price. Others use unqualified teachers to deliver English lessons with questionable efficacy. These are stopgap solutions. Only comprehensive national teacher training programs, education reforms, and in some cases a society-wide change in mindset, can result in markedly improved English proficiency.

Measuring adult English proficiency

The EF English Proficiency Index (EF EPI) was created in 2011 in this context as a standardized measurement of adult English proficiency, comparable between countries and over time. It is the first index that compares the average English language ability of adults in different countries.

This second edition of the index uses a unique set of data gathered from 1.7 million adults using free English tests over a period of 3 years, from 2009 to 2011. For the first time it includes data about English proficiency variation between men and women, adults of different ages, employees in different industries and job levels, and adult immigrants in English-speaking countries. The data is presented in this EF EPI report, a series of country fact sheets, and a separate EF EPI for Companies report (EF EPIc), which can all be downloaded from the following website: www.ef.com/epi

Over the years to come, we hope that the EF EPI will provide a uniquely standardized comparison of English proficiency that is useful for citizens and governments alike when trying to evaluate the effectiveness of their language policies over time.

Two billion people will be learning English by 2020.

The EF EPI 2012 ranks 54 countries and territories by adult English proficiency.

English Inequality

The 54 countries and territories in this year's index illustrate the wide range of English skills around the world.

English by gender, sector, and age

In this edition of the EF EPI we have for the first time gathered demographic data on our test takers, which allows us to see the difference in skill level between women and men, and between adults of different ages. We have also gathered test data from over 100,000 employees of companies around the world. Based on that data we can see the varying skill levels across industries and levels of seniority.

Comparison of countries with their neighbors, trading partners, and closest allies provides a fascinating study in divergent national priorities and educational policies.

This data is exciting because it allows us to see that beneath the seemingly black and white country rankings, there is enormous variation within countries. In some low proficiency countries, professionals are at a high proficiency level. In some high proficiency countries, several industries are low proficiency. High school graduates don't speak English as well as young professionals, except in a few countries. Managers speak English much better than executives, but not in every country. We hope this fascinating new data will give governments, companies, and individuals information which they can use to tailor their English training programs.

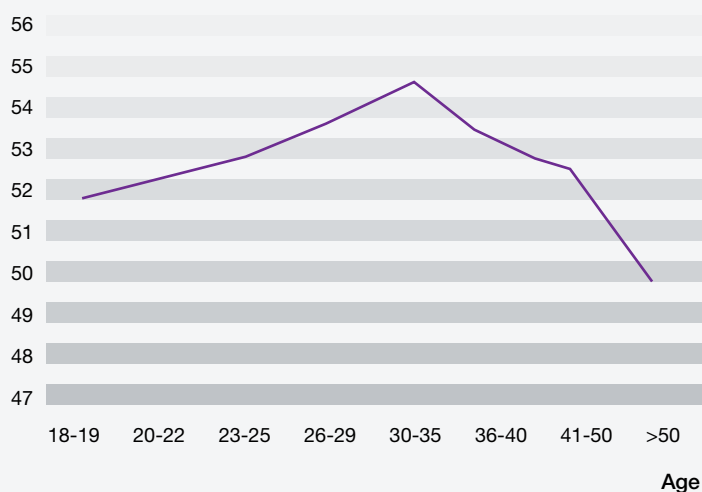
Generation Gap

Young adults speak English best

One might expect that students finishing secondary school would have the best English because they have just completed several years of formal English instruction. However, our data shows that English ability is highest among people in their early thirties, as young professionals, recognizing the importance of English, continue to study and improve their skills after entering the workforce. Their ability to use English at work reinforces the English skills they already have and improves their proficiency over time.

The decline seen among middle-aged adults probably reflects a generation gap rather than forgetfulness: these adults grew up in a time when English was less important both in school and at work. As a group, they have not been able to catch up with their younger compatriots.

EPI Score





Gender Gap

Women speak better English than men

Worldwide, women's English proficiency outpaces men's by a measurable margin. This is in line with rising levels of tertiary education enrollment among women, and the trend in many countries for female students to be over-represented in the humanities. A few countries differ, with men scoring slightly better. However, there is a very wide gender gap in just one region: women in the Middle East and North Africa score more than five points above men.

Female

EF EPI Score

53.90

Male

EF EPI Score

52.14

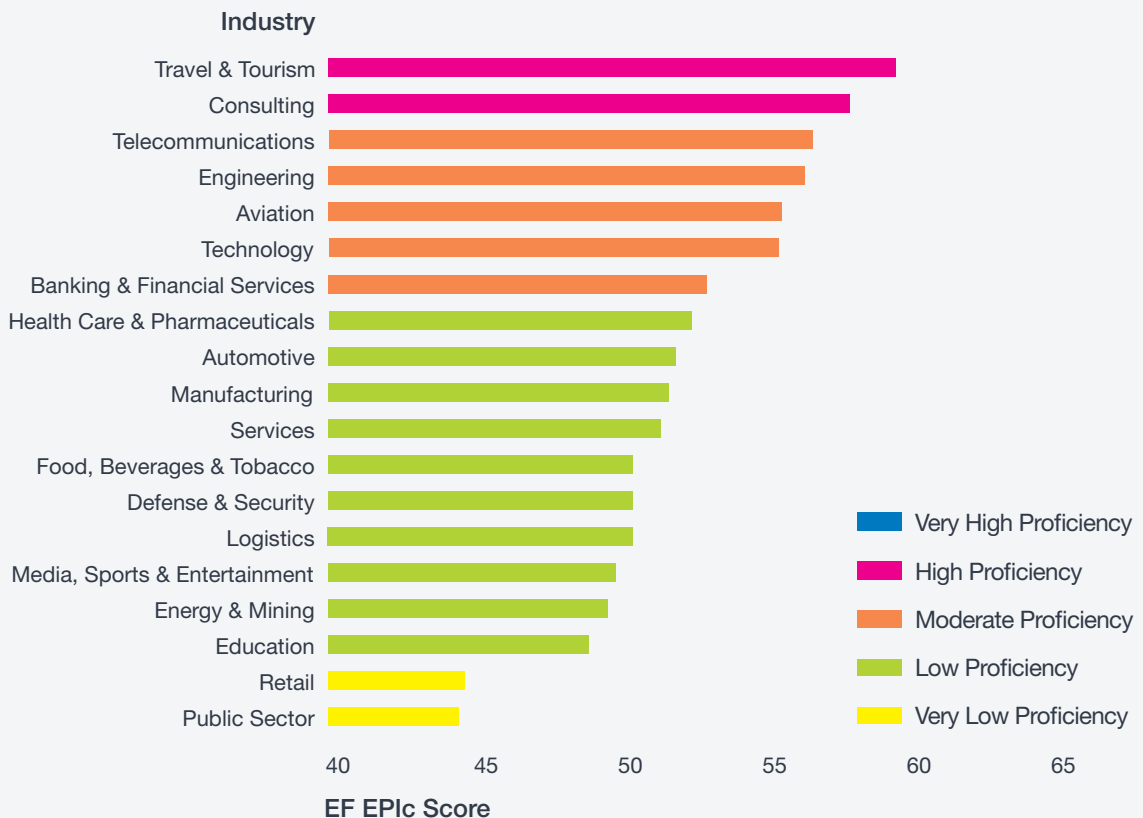
English by Industry

Internationalized sectors use English. National sectors don't.

The ranking of industries worldwide supports the intuition that the sectors most obviously operating on a global scale (travel & tourism and consulting) also have the strongest English skills. By contrast those industries which are most focused on the domestic market—education, the public sector, and retail—are weakest in English.

One conclusion is obvious: governments are not doing their part to train their own employees in English. Countries have an enormous opportunity to improve average adult English proficiency by adequately training the portion of the workforce that they most directly control. In many countries well over 10% of employees are in the public sector.

EF English Proficiency Index for Companies—EPIc



Detailed analysis of the English skills of employees by sector, seniority, and country is presented in the EF English Proficiency Index for Companies (EF EPIc), available for download at www.ef.com/epi.



English Learning Today

Half of employees in international companies use English every day at work.

Importance of English as a foreign language

Historically, speaking a second language, or more specifically, speaking a highly valued second language, was a marker of the social and economic elite. English spread its influence under the British Empire and the post-war economic expansion of the United States, in many countries replacing the role that French had played previously as a marker of the well-educated upper class. However, globalization, urbanization, and the internet have dramatically changed the role of English in the past 20 years. Today English proficiency can hardly be thought of as an economic advantage at all. It is certainly no longer a marker of the elite. Instead it is increasingly becoming a basic skill needed for the entire workforce, in the same way that literacy has been transformed in the last two centuries from an elite privilege into a basic requirement for informed citizenship.

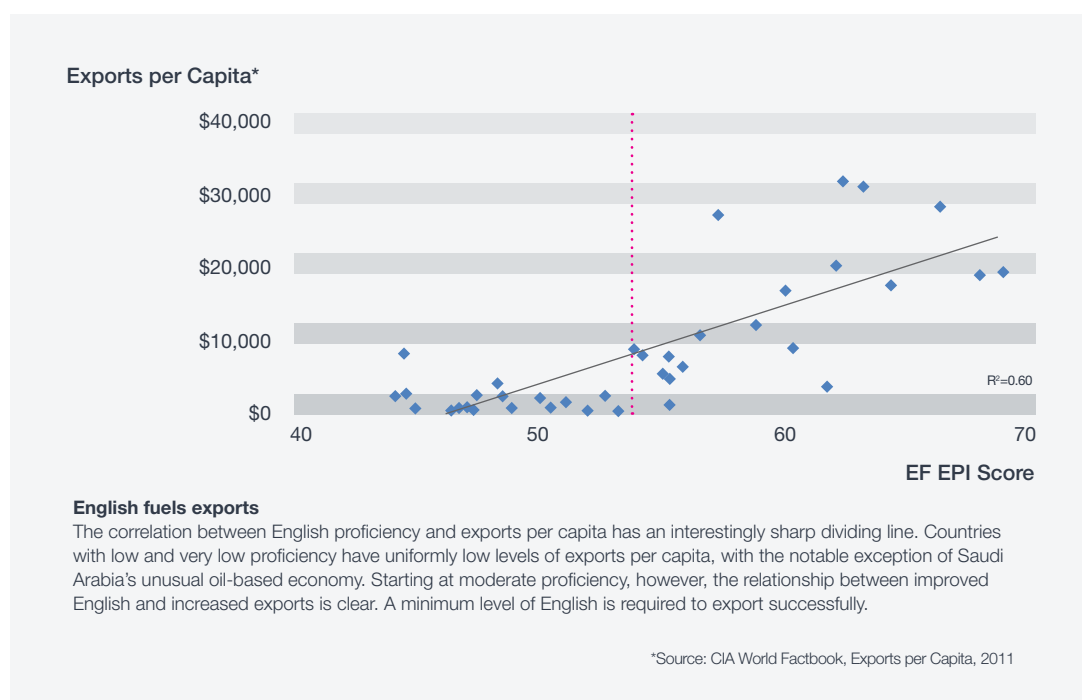
Globalization is driving English learning

A 2010 survey of 26,000 non-native English-speaking employees in international corporations, conducted by Global English, indicated that 55% of employees were using English every day at work. Only 4% indicated that they did not use English at work at all.

English has become the de facto language of communication not only in international business, but also in nearly every context where two people do not share a language. Even within countries where several regional or tribal languages meet, English serves as a common communication tool. Despite the controversy this de facto status can cause, governments around the world are increasingly recognizing that English proficiency is a necessary skill for all their citizens to participate in a global economy.

Export-driven economies require English

Strongly export-driven economies all speak English. The reverse is not true: a few countries proficient in English do not rely on exports. The one-sided nature of the relationship indicates that English is one of many necessary components for an export-driven economy. English skills improve innovation, communication with suppliers and customers, and recruiting power, all of which contribute to a better export environment. Other factors which contribute to high exports, such as infrastructure, government regulation, taxation levels, and natural resources, are not affected by English.





English and Economic Development

English proficiency shows a strong correlation with a country's gross national income.

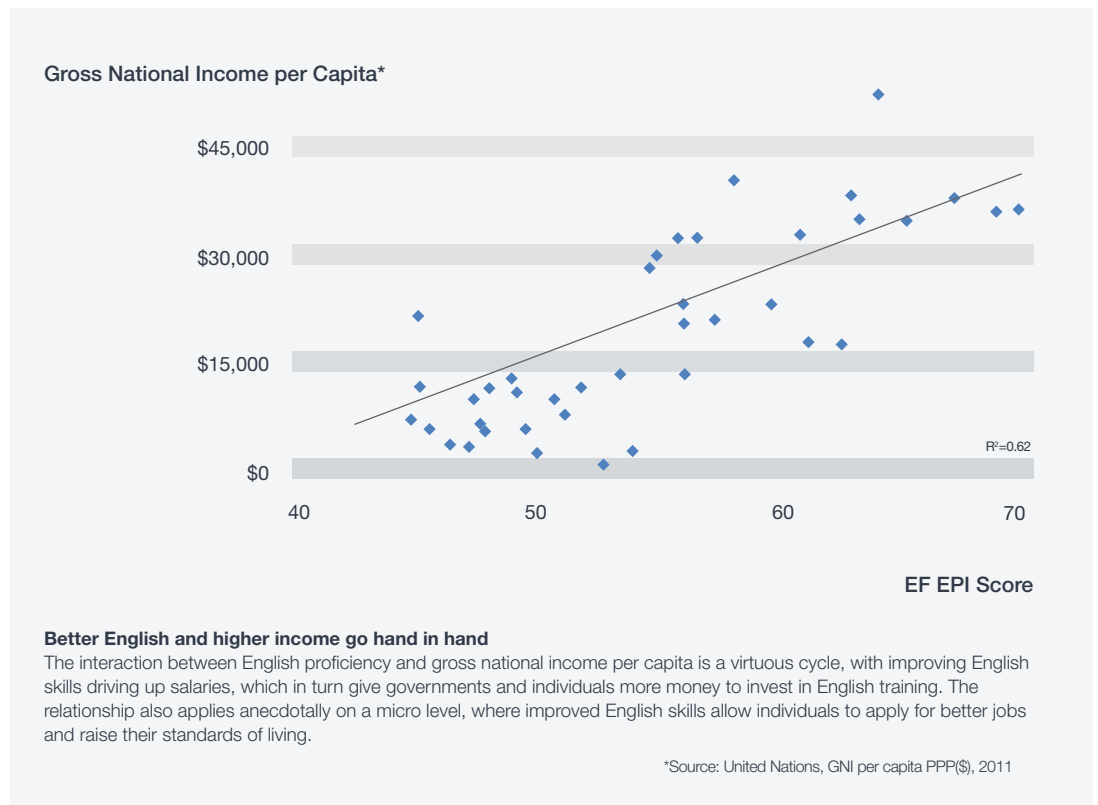
Individual earning power and English

Although English skills have long been an explicit requirement in certain types of jobs such as diplomacy and translation, those skills today are an implicit advantage in nearly any job across all sectors of the economy. Recruiters and HR managers around the world report that candidates with unusually good English ability for their country garner 30-50% higher salaries than similarly qualified candidates without English knowledge.

While those with proficient English earn more, people who are poor at English may be passed over for promotion. In a 2012 survey by the Economist Intelligence Unit, nearly 70% of executives said their workforce will need to master English to realize corporate expansion plans, and a quarter said more than 50% of their total workforce will need English ability. English is becoming a core criterion in determining employability.

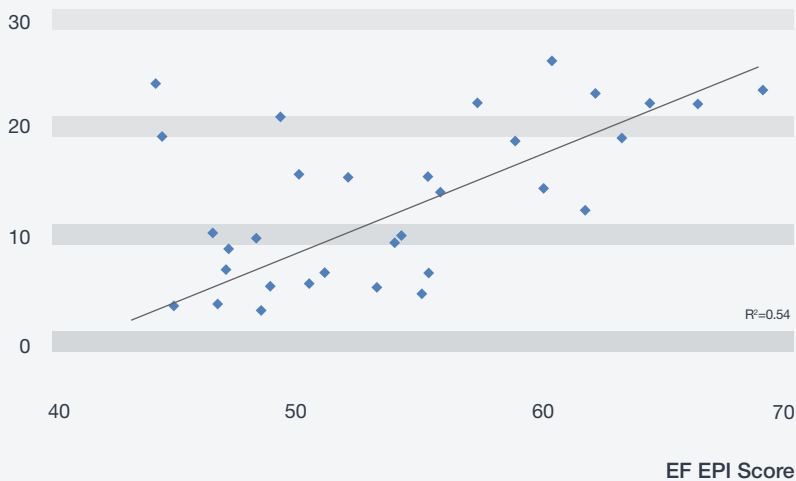
English is key to attracting foreign investment

After cost, the most important factor for U.S. and U.K. companies when considering outsourcing business processes is the education level of the local population and its English proficiency. Developing countries ready to tap into the outsourcing boom recognize that producing large numbers of skilled graduates able to communicate in English is the most reliable way to expand their export-focused service economy. A strong export sector in services is in turn essential to creating a middle class, strengthening spending, and growing the national economy. It is no surprise that many developing countries are now integrating English into the curriculum from the primary or even pre-school years, using it as a medium of instruction in addition to teaching it as a separate language. English is increasingly included in national standardized testing.





Trade in Services (% of GDP)*



Globalized service economies are English-speaking economies

Many developing countries strive to transform their largely manufacturing and resource-driven economies by providing outsourced services such as call centers and IT support for companies in wealthier nations, at salaries higher than the national average. The correlation between trade in services and English proficiency is encouraging for these countries, who will find that investments in English proficiency have a far-reaching structural impact on their economies.

*Source: World Bank, 2010. The sum of service exports and imports divided by the value of GDP, all in current U.S. dollars.

Doing Business in English

An increasing number of companies are mandating English as their corporate language.

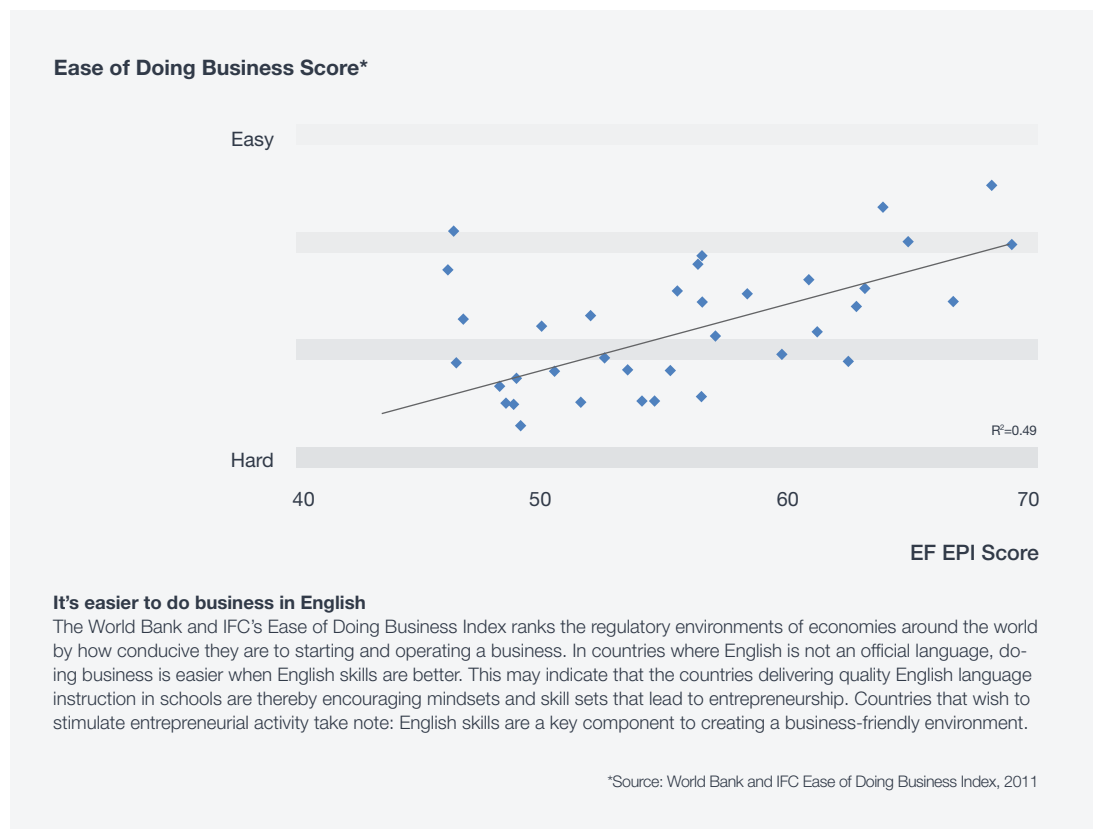
English as the company language

It is often said that English is the language of business, and while that hold will never be exclusive, it is today truer than ever. An increasing number of companies have recognized the long-term advantages to productivity and growth that adopting English as a common company language can have. Nokia, SAP, Samsung, Aventis, and Renault have already mandated English as the corporate language.

In 2010, Rakuten, Japan's largest online marketplace, also took the plunge. In her case study, Harvard professor Tsedal Neely lays out the goals and challenges of this ambitious move. The goals were evident: to increase the company's competitiveness on the global playing field, to remove linguistic bottlenecks in internal task and resource allocation, and to speed integration in international mergers and acquisitions. The primary challenges were to make sure the new

policy was implemented uniformly, to motivate employees to raise their level of English quickly without undermining their self-confidence, and to minimize productivity losses during the period when many employees' English was still limited.

Rakuten's transition to English as a corporate language is ongoing. Although many employees have embraced the change and dramatically improved their English, others have been more skeptical. Nevertheless, it is clear to many business leaders that English is increasingly a key component of their competitiveness. Many companies, both large and small, are taking the logical next step by asking their employees to use and improve their English every day in the workplace.



Social Media

EVERYDAY (Tell people in the class) ^{ALL}

1. Facebook

- Share publicly on our Walls ^{ALL}
- Direct private messages / ^{ALL} COHOR
- Key people (NGOs / Professors) ^{ALL}

add VC
link to
voting

2. YouTube / Vimeo ^{ALL}

TV Ads

3. Internal Campaign

Flyers (DMA)

4. Twitter ^{ALL}

5. Blogs → link to key people ^{ALL}

6. LinkedIn @ profile page ^{ALL}



English Spreads Innovation

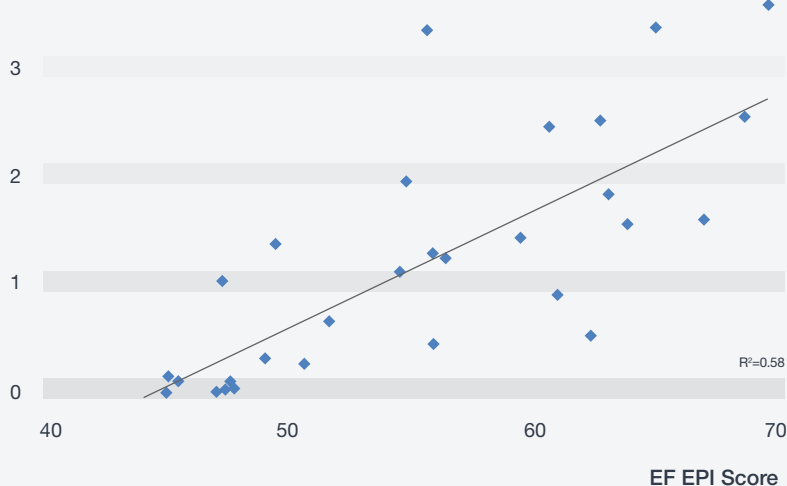
35% of scientific articles are the result of collaboration among researchers from different countries.

Effective research requires collaboration

International communication among scientists and engineers is central to collaborative research and the sharing of technology between countries. Researchers in the United States publish by far the most scientific papers every year and the U.K. ranks third in publication numbers, after China. However, despite its volume, Chinese research accounts for only 4% of global citations in science publications compared to 30% for U.S. research and 8% for the U.K. This demonstrates that Chinese research is less well-integrated into the global knowledge economy.

Countries with low English proficiency also demonstrate unusually low levels of international collaboration on research. In 2011 only 15% of scientific papers published in China cited an international collaborator, compared to over half in Belgium, Denmark, and Sweden. This inability to access the research published by others and to contribute to international innovation is a significant challenge for countries lacking English skills among highly trained professionals.

R & D Expenditure as % of GDP*



Innovation thrives on English

Research and development spending is positively correlated with English proficiency on the whole. Around the world productive research increasingly relies on access to international scientific journals, and collaboration between scientists in different countries is extremely common. Today, over 35% of science research articles are the result of collaboration among researchers from different countries, a 40% increase from 15 years ago. Countries that do not train their scientists and engineers to speak English leave them unable to tap into this global knowledge network.

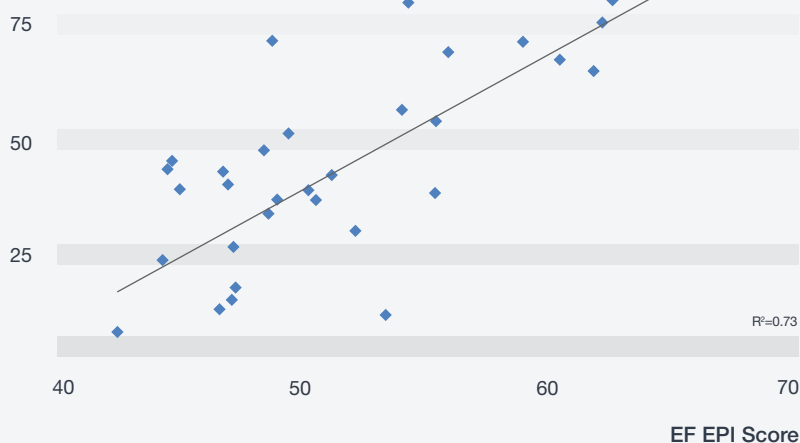
*Source: UNESCO Institute for Statistics, 2010

The internet: a global communication platform

An estimated 27% of internet users are native English speakers, and that portion declines each year as internet penetration rises globally. However, in 2011 half of the pages on the internet were in English, and even this relatively high figure understates the importance of English online. A wide variety of free and paid tools, software, and online services are available only in English. Internationally recognized scientific journals, largely in English, publish online. The U.S. Library of Congress, the largest library in the world, and the British Library, the second largest, have vast English-language collections which are increasingly digitized.

The ability to communicate sufficiently well in English to leverage this enormous pool of online information is a necessity for any researcher, entrepreneur, or scholar. In addition, artists, musicians, writers, and other creative people use English to share their work online. When people without a shared native language meet, as they do constantly online, they most often communicate in English. The internet, a global communication platform, and English, a global language, together allow the rapid cross-pollination of ideas and innovations around the world. Those who are not online or cannot speak English are increasingly left behind.

Internet Users per 100 People*



English speakers use the internet

In countries where English proficiency is high, more people are using the internet. This is a self-reinforcing activity: better English allows people to access online tools and resources and accessing these resources improves people's English through exposure and practice. The benefits of technology to language learning are well documented.

*Source: International Telecommunication Union, World Telecommunication/ICT Development Report and database, and World Bank estimates, 2011

English and Quality of Life

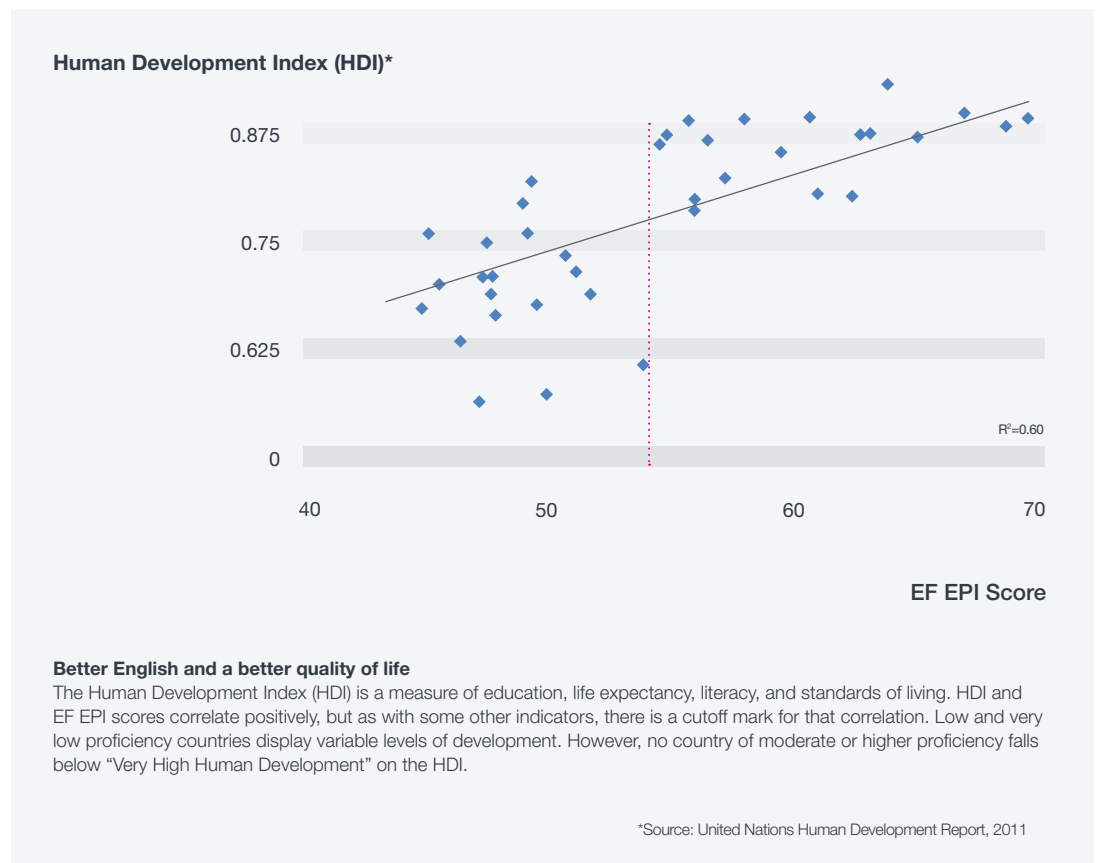
Too often English is treated as a luxury.

English as a basic skill

English skills are key to a country's economic development. Their link to human development is more tenuous. Obviously teaching English is not possible when populations are struggling to gain access to clean water, health care, schools, and adequate security. It is only after a society is sufficiently stable, daily life adequately routine, and survival no longer in question that we can begin to discuss the question of English.

However, rather than consider English as a nice bonus skill, to be added to the school day after more basic skills are mastered, curriculum planners would be wise to consider the central role English plays in determining employability and professional success. English is less important than clean water, but is it less important than algebra?

Too often English is treated as a luxury, taught well only in private schools and in secondary education. The evidence presented in this report is that English is today a core skill. As such it should be taught and tested to a level equivalent to mother tongue reading and math skills. Considering the growth in the importance of English over the last 15 years, a strong working knowledge of the language for today's children will be even more essential when they enter the workforce.





English Study

Three-fourths of English speakers today are non-native.

Even in full-immersion environments, children need four to seven years to gain native-level English skills.

English increasingly belongs to non-native speakers

Not surprisingly, English teaching theory has evolved rapidly in the last two decades in response to the changing student population. Linguists and English teaching professionals increasingly regard the end goal of English language instruction as successful communication rather than an inflexible standard of correctness or native-speaker pronunciation. In a world in which more than three-fourths of all English speakers are non-native, ownership of the English language has clearly shifted from the historic centers of Britain and the United States. Most communication in English today is between non-native speakers, who usually accept non-standard grammar and pronunciation as long as communication remains clear. Anecdotally, many non-native English speakers report easier communication in English with other non-native speakers than with native speakers. Native speakers tend to be less tolerant of perceived errors, differences in pronunciation, and non-standard grammar. They also use jargon and idioms more frequently than non-native speakers. For these reasons, native speakers are often less skilled in communicating successfully when faced with a confused non-native speaker.

English learning is focusing on communication and application

Accordingly, studies suggest that English teaching for both adults and children needs to shift towards teaching successful communication strategies, and student performance should be measured along those same lines. It will take years before this shift can propagate into classrooms and test centers around the world, but students with this type of communication-based training will be far better suited to tomorrow's workplace than those memorizing grammar rules. Even native English speakers working in multilingual environments benefit from training in careful listening and rephrasing tactics to achieve smoother communication with non-native speakers.

Myths and truths about age and English language acquisition

Despite the increasingly young age at which students around the world are beginning their English study, there is no scientific proof of a cut-off point, or "critical period," after which language learning becomes nearly impossible. Research has shown that language learning abilities decline slowly with age after a peak in late childhood, although many adults are still extremely effective language students. Studies show that older children (8-12) are generally faster at learning English and maintain that advantage even after several years of study, particularly in regard to academic English skills. But starting younger allows for more total years of language education. Development of sound and pattern recognition, linguistic curiosity and playfulness, and meta-linguistic awareness are all presented as advantages of earlier exposure to foreign languages. These effects are not measured by tests like those used to create the EF EPI.

Regardless of their starting age, academics say that even in full-immersion settings children need four to seven years to be as competent in academic English as their peers who know it as a first language, and three to five years to be as fluent orally. In the partial-immersion environment in which most students learn English, a far longer time frame is required. Very high proficiency countries teach children English for at least eight years in a formal setting, with exposure to the language beginning much earlier. Universal recognition that complete proficiency in a language is a long-term goal would help students to set realistic milestones for themselves and commit to their study programs accordingly. The reward would be immense: research is increasingly proving that bilingual teens and adults switch between tasks more easily and show heightened mental flexibility.



Public and Private Education

Most English tests do not evaluate a learner's true goal: successful communication.

Seeing the results of English education reform may take decades

English is increasingly a core part of public school education around the world, much as math and science. In the past decade changing policies on when English is introduced in schools have forced many countries to adopt two English learning curricula at once: one for teens not yet exposed to English under the old policy and one for children starting English early under the new one. While policy shifts to introduce English earlier will help the younger generation, they do not produce measurable improvements across the entire adult population for quite some time, particularly in countries where young people are a small portion of the whole. Governments making reforms now need patience and dedication to clear language learning goals for several decades before they will see a detectable rise in English proficiency in the adult population. Adult training programs to improve English proficiency can help to reduce that time frame.

English functions in parallel with national languages

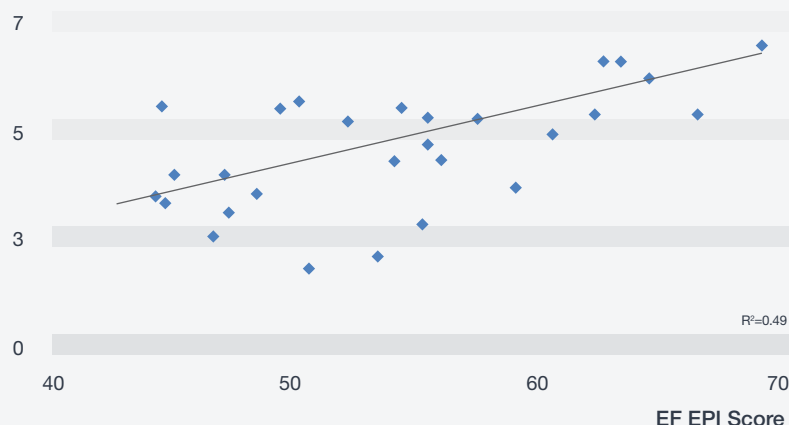
In many countries not all students are required to learn English, either because other national languages take priority or because of the perceived imperialism of English's global dominance. However, there is little

evidence that learning English conflicts with mastery of other languages. Multilingual countries can clearly achieve high levels of English proficiency without sacrificing their identities, as illustrated by Finland, Singapore, and Malaysia. It is even more difficult to argue that the United States and the United Kingdom are today driving the spread of English. Far more people speak English outside these countries than within them. Instead, evidence shows that a globalized economy requires a shared language, and English serves that function.

Students and adults are turning to private English education

The private English education industry is immense and includes a dizzying array of study options for all ages and budgets. Parents who see English as an essential skill turn to group courses for their ever-younger children. Adults who attended school during a time when English was less important take online or evening courses to improve their employability. Students aiming to achieve top marks in high school exit or university entrance exams spend time abroad. Companies trying to increase productivity train their staff. In addition to all these formal language courses, tens of thousands of websites dispense English learning lessons, tips, videos, and e-mails to be consumed individually outside any structured language learning program.

Public Spending on Education as % of GDP*



Strong investment in education is necessary to teach English well

The majority of the population learns most of the English it will acquire at school. Teaching English to all students to a high level requires thoughtful planning, adequate teacher training, and sufficient resources. However, money alone is not enough, as is clear by the wide variation in English proficiency among countries investing between 5% and 6% of GDP in education.

*Source: World Bank, 2010

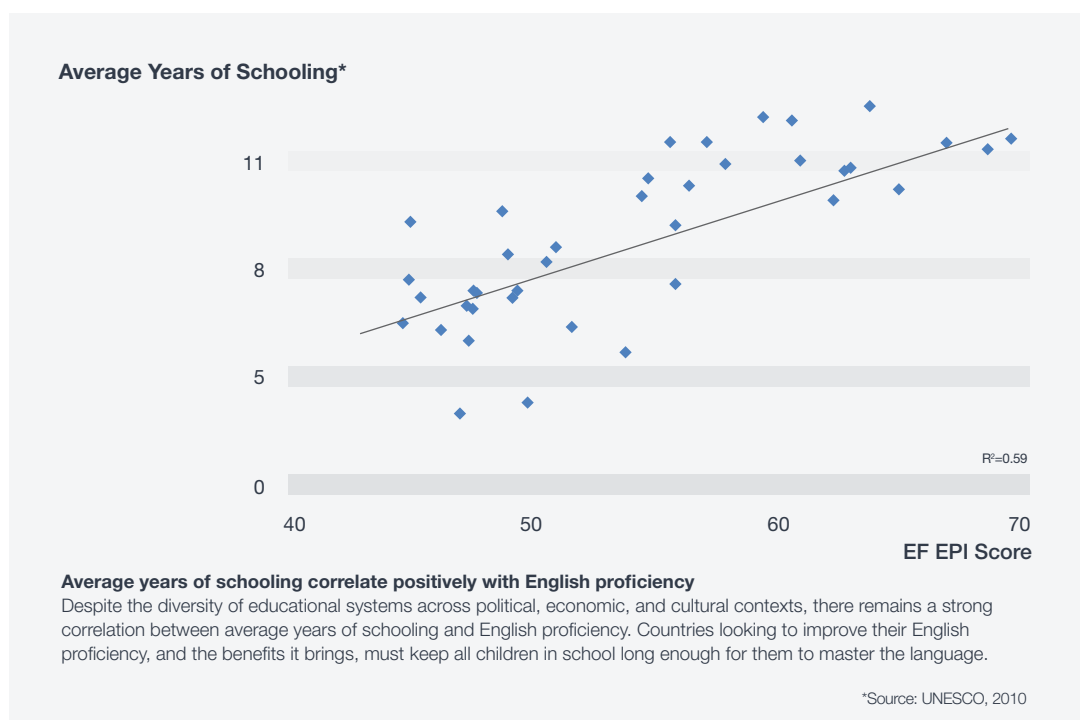
The English language training industry needs standardization

Today students are presented with an ever-increasing variety of learning methods, from the classic teacher at a blackboard, to the tailored, mission-oriented, multi-platform learning program available 24 hours a day on demand. Historically most students have received their formal education through the public school and university system and have relied on that system to set appropriate competency goals, align curriculum and teaching methods to reach them, and evaluate success before delivering diplomas. In the private English learning sector what students encounter instead is overwhelming options in a fragmented marketplace. The lack of standardized methods to describe ability, quality, and goals in English learning, and students' lack of practice in setting such goals independently, lead to time and money wasted on English learning methods that are unproven, low quality, or poorly matched to the needs of individual students. Students are discouraged both at the outset by the confusing diversity of options and as time passes by the lack of any feeling of progress. Personalized, unbiased guidance would reduce frustration and inefficiency, but no such guidance is available.

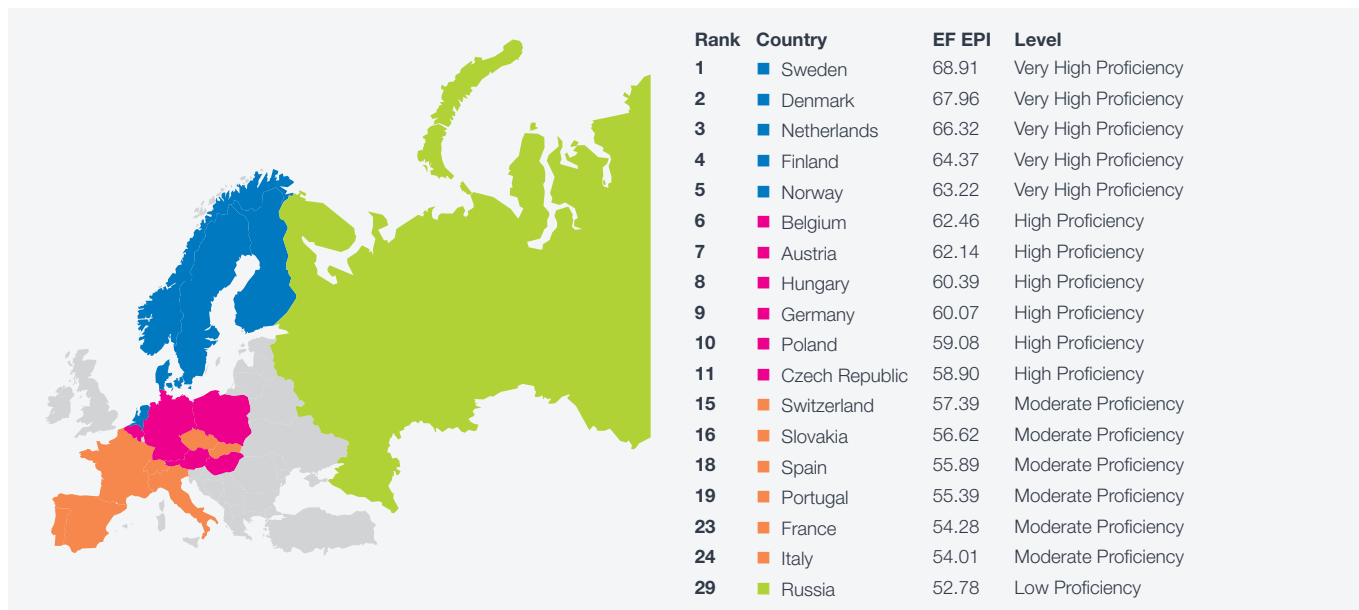
Current English competency tests focus on outdated definitions of proficiency

The Common European Framework of Reference (CEFR) for Languages is a broad attempt to define the different abilities of language students at different levels of study. Since its conception in the last decade, it has been widely adopted by both public and private sector language instructors to align course levels. However the CEFR is only a first step towards standard-setting in language education. More detailed definitions of finer-grained skill levels and accompanying evaluative tools are needed, particularly those which take into account current thinking on communication as the primary goal of English study. The most widely adopted English competency tests today, although aligned with the CEFR, are still too heavily weighted towards an older notion of proficiency which is no longer in sync with the role that English plays in the world.

The USD50 billion dollar private English instruction industry is excessively fragmented.



Europe EF EPI Rankings



Europe's explicit culture of multilingualism gives it by far the highest English proficiency of any region.

Europe speaks English

Europe is remarkably strong in English. All 11 of the top scoring countries in the main index are European. In addition, all Schengen Area countries—European countries which do not impose border controls on each other—have moderate to very high proficiency. The European Union has an explicit goal of multilingualism for all its citizens. This affirmation of a culture of multilingualism is a powerful force driving changes in public school curricula, corporate culture, and European Union policies.

European adults are increasingly called upon to interact with colleagues and partners outside their countries of origin. English is the most common language of communication in these settings, and young professionals have the best levels of English across most of Europe.

Language of politicians and students

Adults in northern Europe speak English well, and this common cultural trait is visible in everyday life. Imported television programs are rarely dubbed. Politicians make speeches before international bodies in English. University students often work directly from source texts published in the United States or Britain and write their final theses in English. A culture of English proficiency, once in place, reinforces English learning among children. They learn to see mastery of this tool as an essential part of growing up.

Central Europe increasingly speaks English

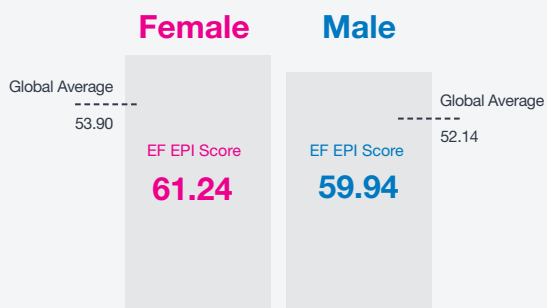
The countries of central Europe make up the second bloc of high proficiency nations. Despite the legacy of the U.S.S.R. and its imposition of Russian as a foreign language in some parts of central Europe, today's adults have learned to speak English. Their proficiency is all the more striking considering that Poland and the Czech Republic spend significantly less on education as a portion of GDP than many other European countries.

Strength despite austerity

Despite the relatively strong English skills in Europe, there is still significant room for improvement. In today's strained economic climate, moderate proficiency countries must continue with proposed education reforms in English instruction in order to raise their proficiency levels to those of their neighbors. Education spending across Europe does not correlate well with English proficiency. This suggests that current funding, if spent effectively, should be sufficient for all countries to attain high or very high proficiency. Well-developed networks for sharing information about education systems between European countries can give weaker countries information on best practices which they can use to implement cost-effective reforms.

In particular France and Italy, both large and sophisticated economies, can do better. Our data indicates that the level of English instruction in France and Italy is below European standards, rendering adults in these countries less able to participate in European and global marketplaces. In these challenging economic times, an under-skilled workforce is the last thing either country needs.

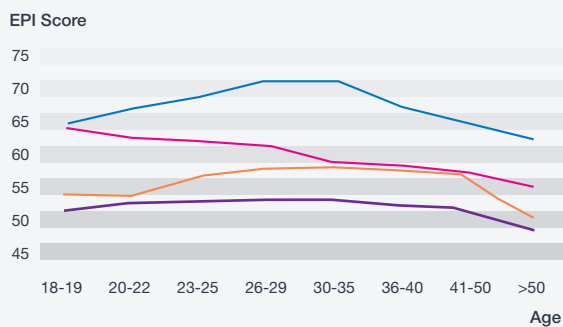
Gender Gap



Proficiency in men and women similar across Europe

In most European countries men and women have comparable levels of English skills, in line with the relatively low gender inequality indices in these countries. However, four of the five countries in the world with a significant difference between the sexes are also in Europe. Hungary is the only country in the world where men's English proficiency outpaces women's by a sizeable margin: 3 points. On the other hand, Italian women's English surpasses their male counterparts' by an even wider 3.6 points.

Generation Gap



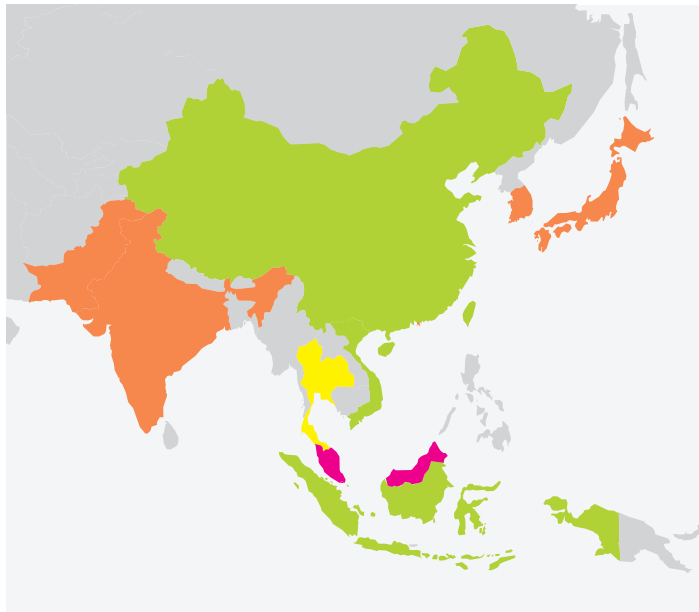
- EU Very High
- EU High
- EU Moderate
- Global Average

Young European professionals need English

Across Europe, adults under 50 speak English better than older adults, although the difference in proficiency levels is not as marked as might be expected. The time allotted to teaching English in schools has grown over the past few decades; however, in Europe, many adults have been improving their English skills outside of school. In very high proficiency countries, adults aged 41-50 speak English just as well as 18-year-olds, and in moderate proficiency countries their advantage is even stronger.



Asia EF EPI Rankings



Rank	Country	EF EPI	Level
12	Singapore*	58.65	High Proficiency
13	Malaysia*	57.95	High Proficiency
14	India*	57.49	Moderate Proficiency
17	Pakistan*	56.03	Moderate Proficiency
21	South Korea	55.35	Moderate Proficiency
22	Japan	55.14	Moderate Proficiency
25	Hong Kong*	53.65	Moderate Proficiency
27	Indonesia	53.31	Low Proficiency
30	Taiwan	52.42	Low Proficiency
31	Vietnam	52.14	Low Proficiency
36	China	49.00	Low Proficiency
53	Thailand	44.36	Very Low Proficiency

*Countries where English is an official language

Asia's exemplary education systems struggle to bring their students to the highest levels of English proficiency.

Exemplary education but mediocre English

Japan and South Korea both have very literate populations and a strong Confucian culture that values education. Emphasis has been placed on English study in Korea and Japan, both in the public school system and through the enthusiastic use of thousands of private English training centers. Yet levels of English among adults are below the OECD average of 58.58. This is particularly striking when compared to the astoundingly high quality of achievement in math and reading in these countries, which is consistently demonstrated in international tests. An over-emphasis on rote learning, relatively low levels of exposure to foreigners in everyday life, and teacher-student norms which impede conversation practice all contribute to the problem. Government leaders in Tokyo and Seoul must study why their schools are failing pupils in English language instruction while succeeding brilliantly in other key subjects, then make changes accordingly.

India and Pakistan both have large groups of English-speaking adults thanks to the legacy of the British empire. But despite the emphasis placed on English in most schools, and the official status that the language holds, these two countries attain only moderate proficiency overall. While moderate proficiency is an achievement that few developing countries have attained, improvements are needed in both India and Pakistan, particularly in training qualified teachers to make better use of the instructional time already allotted to English.

English as an official language

Malaysia and Singapore, the highest proficiency countries in Asia, are examples of how English can be used to bridge linguistic divides between different communities within the same country. In addition to ethnic Malays, both countries have large Chinese and Indian communities, each with its own traditions and

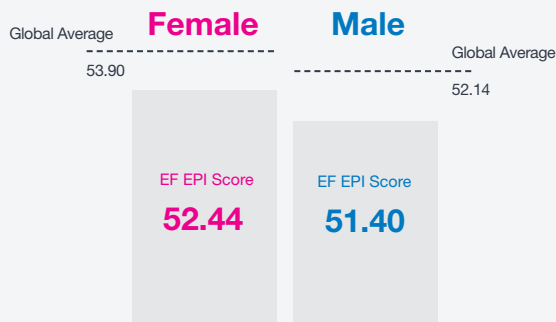
language. English has long been a required subject for all pupils starting in primary school, where it is often the medium of instruction. English proficiency is tested at the end of primary school and again at the end of secondary school. In these countries, English is valued as a shared language across communities, not owned by any one of the three, as well as being an international medium of communication.

Hong Kong's English skills fall significantly below those of other territories in East Asia where English is an official language. In a 2011 survey, more adults professed to speaking fluent Mandarin than English. Hong Kong has, in the past decade, struggled with how to prioritize foreign language instructional time in schools. English and Mandarin are both foreign languages to most Hong Kong natives. The existence of two important languages does not necessarily lead to lower English proficiency, but large amounts of time must be devoted to these subjects if they are to be taught to a high level.

China will require momentous English language training

China is attempting a remarkable linguistic feat. It is at once pushing its citizens towards Mandarin as a shared national language and ramping up English training to reap the full economic benefit of its current global position. More people are learning English in China than in any other country. 100,000 native English speakers are currently teaching there. The EF EPI score shows that China still has a long way to go before it can consider itself adequately proficient in English. But the government has shown drive both in training children via the public schools and in retraining adults—particularly those in the public sector. These efforts are already having measurable results among professionals. Tests administered to working adults in China show they have a large advantage in English proficiency over the population as a whole. These results are detailed in the EF EPI report, available for download at www.ef.com/epi.

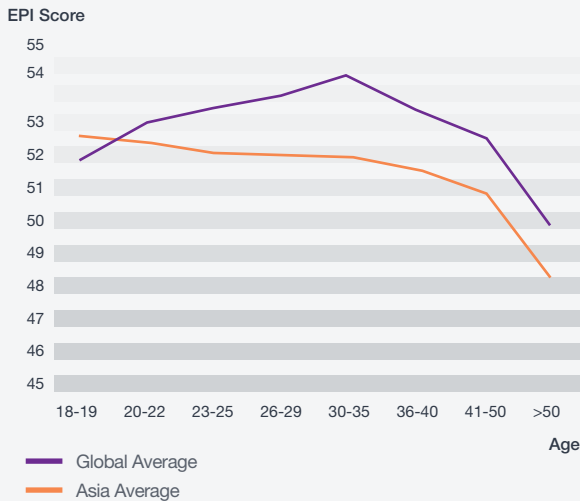
Gender Gap



Across Asia women have slightly better English proficiency

Despite the marked social and economic differences between the countries in Asia, the English gender gap is remarkably stable. Women in each country and across the region speak English better than men, with a narrow divide of about 1 point in most instances. Chinese women's 3-point advantage is unique in the region. The only country where men slightly outscore women is Thailand, but they do so by less than 0.2 points.

Generation Gap

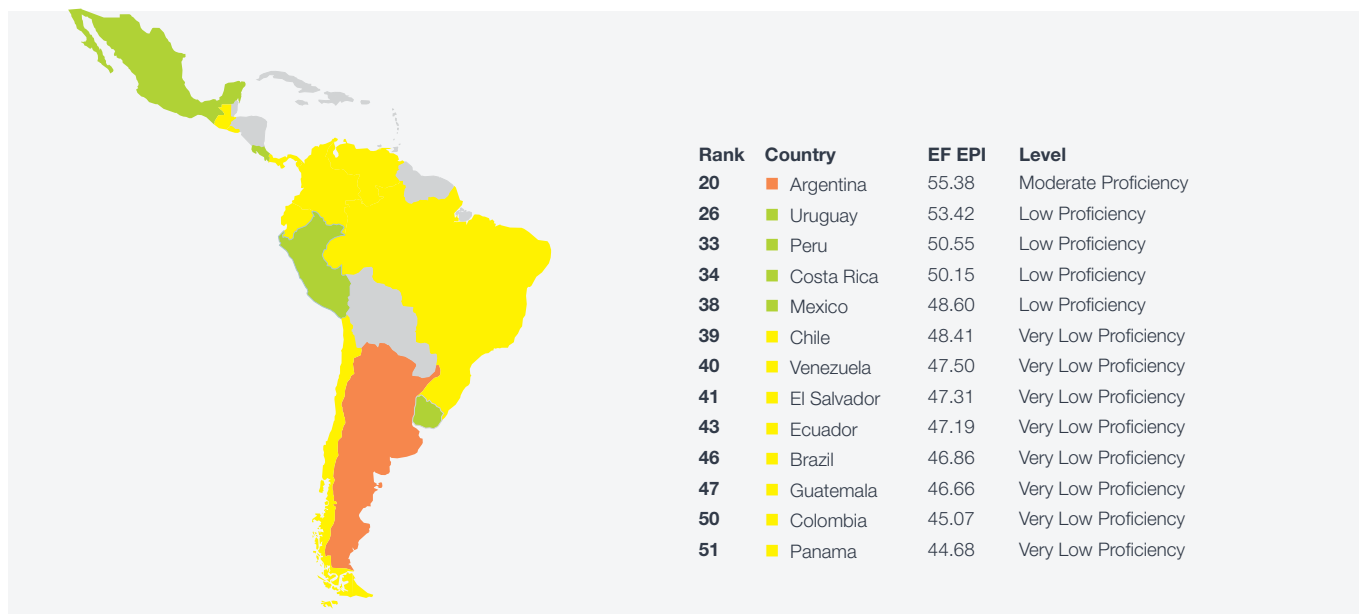


In Asia, English proficiency declines slightly with age

In Asia as a whole, recent high school graduates speak the best English. English proficiency then declines steadily with age. The skills of 18- and 19-year-olds are likely a result of the increased emphasis on English learning among children, and added teaching hours in public schools. Unfortunately, adults across Asia are not improving their English in the same way European adults are through their professional lives. This is not the case in every country in Asia, however. For more detail on individual countries' performance, refer to the country fact sheets.



Latin America EF EPI Rankings



Below-average school quality and equity levels push Latin America to the bottom of the regional rankings.

Spanish serves as an international language in Latin America

Latin America's English proficiency is very low. In part this is explained by the importance of Spanish to the region. A shared language already allows for continental trade, diplomacy, and travel, lessening the motivation to learn English.

These results are in line with the Organization for Economic Cooperation and Development's PISA study in 2009, which found that across Latin America 48% of 15-year-olds cannot perform rudimentary tasks in reading and comprehension necessary to participate in society, while among low-income students that figure rose to 62%. Clearly, if literacy skills are lacking, English will fall by the wayside.

Weak public education hampers English proficiency

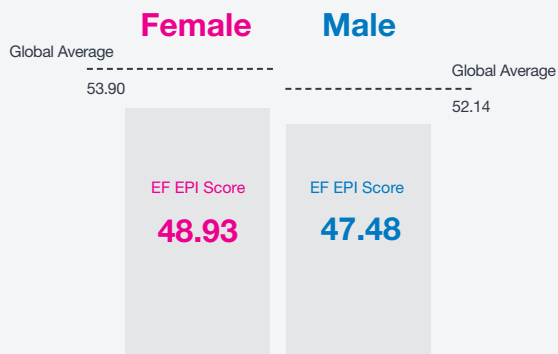
However, the poor quality of public schools across Latin America combined with unequal access to education provides a more convincing explanation for the region's weakness in English. When Brazil administered tests to 2.3 million Grade 4 students (10 years old) in 2007, it found that 52% of students nationwide had low or very low levels of reading ability in Portuguese, the country's main language. An enormous variation between regions was also found: 32% of children in the capital region, Brasilia, had low reading skills versus 74% in the lowest-scoring region. Across all regions, low levels of parental education and student ethnicity had strong impacts on reading skills.

Understanding higher proficiency

Argentina is the only country in Latin America with moderate English proficiency. Literacy rates in the country are higher than average for the region (97% compared to 89.9%) and average years of schooling (15.1 years) are also well above the regional average (13.1 years). Argentina has had high rates of primary and secondary school enrollment since the 1970's, when most of its neighbors still educated less than half of children through 6th grade (12 years old). However, Argentina's economic instability has hampered its development and prevented investment in education from rising over time. In addition, unusually high repeat levels in both primary and secondary school as well as high levels of dropouts in secondary school prevent Argentina from attaining the levels of English found in comparably wealthy countries in Eastern Europe.

A solid basic education for all citizens is a prerequisite for English proficiency.

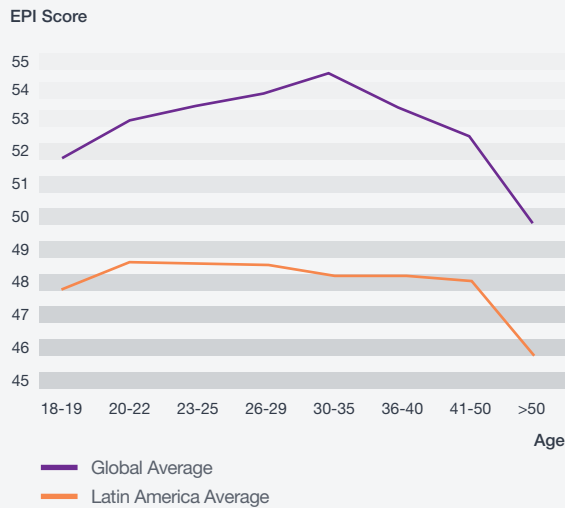
Gender Gap



Men and women speak English nearly equally in Latin America

As in every region measured by the EF EPI, in overall terms women in Latin America have an English proficiency level that surpasses men's. However, the gender gap is slight, and in about half the countries for which we have adequate data, it is inverted, with men scoring slightly better than women. The only countries with a wider margin are Argentina and Peru, with 2.3- and 3.4-point gaps respectively, both in favor of women.

Generation Gap

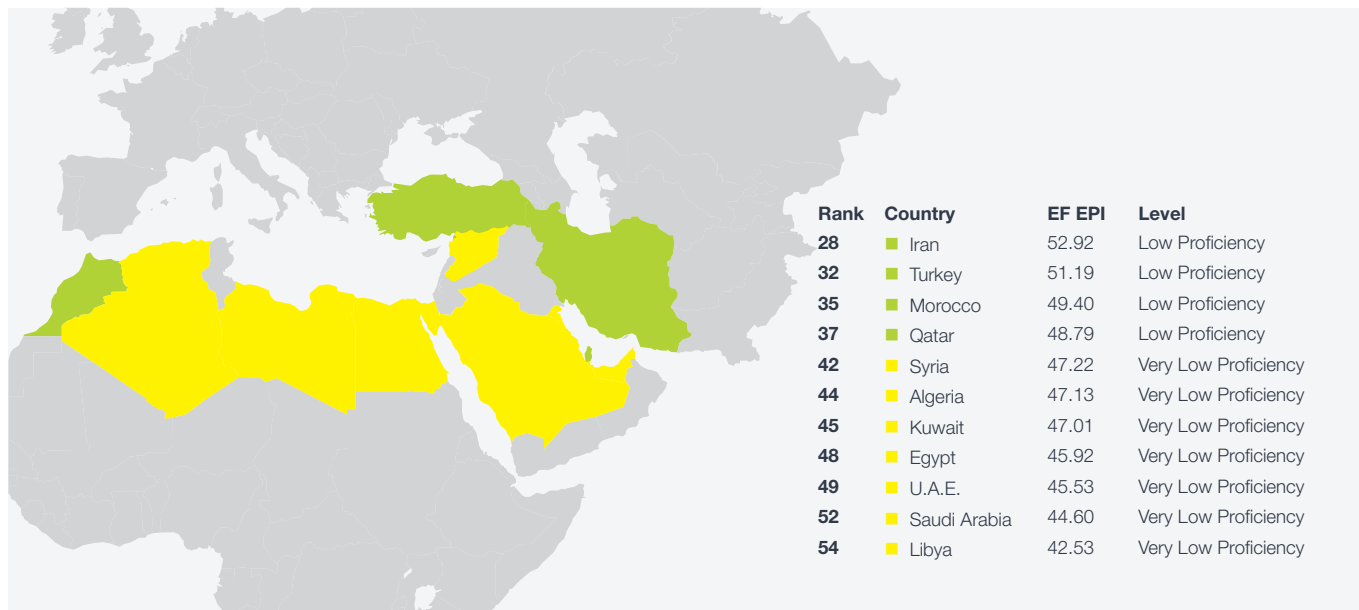


English varies little with age in Latin America

The countries in Latin America have the lowest level of age-related variation in English proficiency of any region. Young high school graduates, college students, and professionals all use English equally poorly. Not only are schools failing to teach children English, but adults are not furthering their proficiency during their careers. This would indicate that where schools do not provide an adequate foundation of English, working adults do not have the time or energy to continue their studies. However, China proves the contrary: 18- to 19-year-old Chinese adults have slightly less English than Latin Americans of the same cohort, yet by age 30-35, the Chinese have a proficiency score of 51.61, more than 3 points higher than Latin Americans of the same age group.



Middle East & North Africa EF EPI Rankings



Political transitions in the Middle East and North Africa are an opportunity to improve education systems in the region.

A region in transition

The past two years have witnessed enormous political change in the Middle East and North Africa (MENA). Entrenched rulers have been overthrown and it is not yet clear what priorities new governments will set. It is evident, however, that improving the quality of education will be necessary to human and economic development across the region.

40 years of education reform

Spending on public education over the past few decades in the Middle East and North Africa has been at or above levels in East Asia and South America when comparing countries with similar levels of economic development. Despite this investment, the average years of schooling in the adult population remain low (5.4 years compared to 7.2 in comparable countries in other regions). This is in part due to the extremely low level from which the MENA region countries started in the 1960's, when average years of schooling were between 0.5 and 2 years. Today, access to education for both girls and boys from primary through tertiary levels is high. Literacy rates continue to improve, although they are still low in North Africa.

Quality education still lacking

Although access to education has improved significantly over past decades, the quality of instruction is still patchy. No countries in MENA score above the international average in assessments like PISA and TIMSS, which compare the reading and math skills of teenagers around the world. The best-scoring countries in the region, Iran and Turkey, also score best on the EF EPI. This is further evidence that an adequate level of English cannot be attained with inadequate general education.

A booming population provides a unique education opportunity

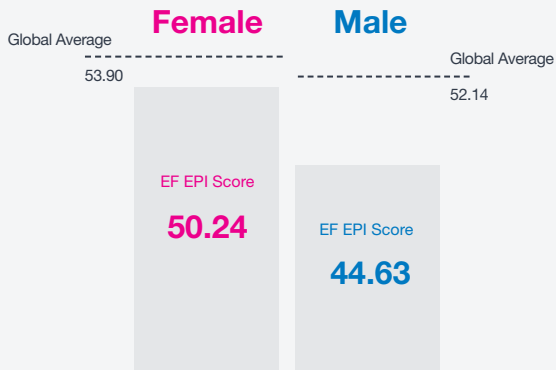
Over 60% of the population in MENA countries is under 30 years old. This youth boom, while challenging for schools to adapt to, is also a unique opportunity. Significant curriculum reforms including improved English language instruction can have a much faster impact on the adult workforce than is possible in countries with an aging population.

Commitment to English in education

Emerging governments in the Middle East and North Africa, as well as more established leaders, are considering how best to educate their youthful populations in the 21st century. Many countries invest a healthy portion of GDP in education already, yet fail to attain high international standards. English language ability is a key skill for driving innovation, encouraging entrepreneurship, and attracting foreign investment. Leaders in MENA countries would do well to take stock of the relatively weak English skills in their populations and commit to lasting education reforms to rectify this skills gap.

Creating a sufficient pool of qualified English teachers is usually the first hurdle to an effective English language instruction program in public schools. Training large numbers of young people to teach English and incentivizing them to join the teaching profession should be a high priority for countries across the Middle East and North Africa.

Gender Gap

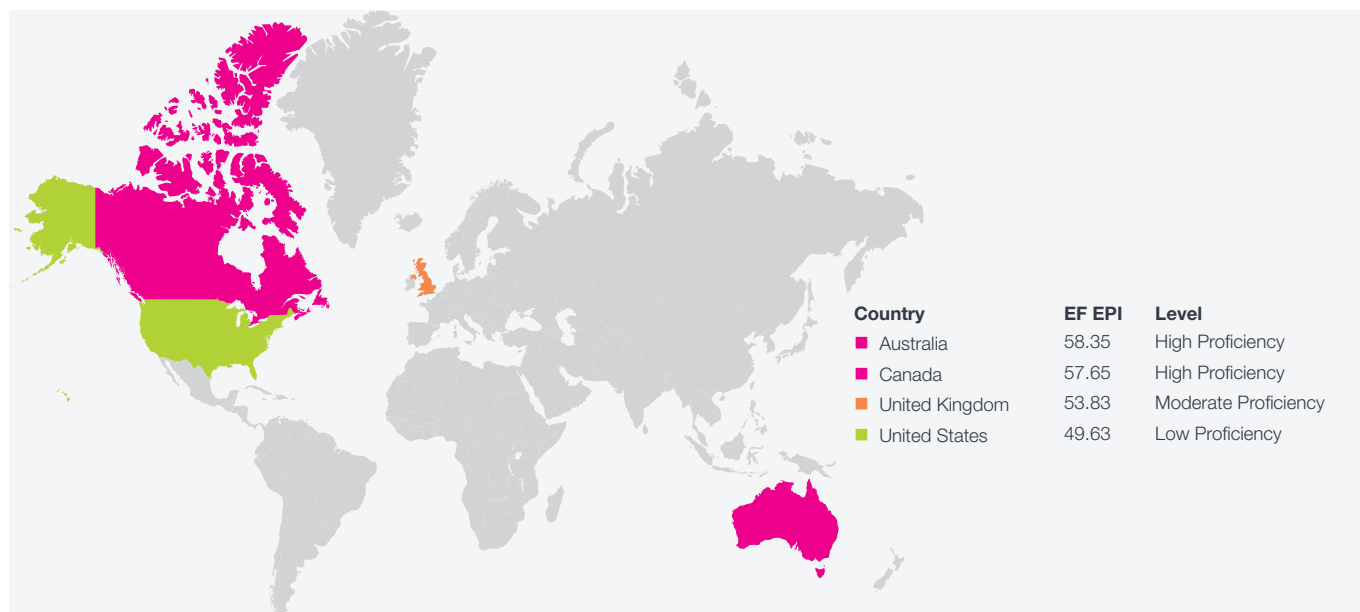


MENA men speak English less than any other group

No single country or region in the world exhibits a wider gap in English proficiency between men and women than the Middle East & North Africa. The UN's gender inequality index finds that the region fares worse on measures of women's health, empowerment, and participation in the workforce than all other regions represented in the EF EPI. However, it is MENA women who outscore men by such a wide margin. Could these women see English as a pathway to opportunities in the wider world that they find lacking in their own societies?



Adult English learners in English-speaking countries



Differing countries of origin and profiles account for the wide gap in English proficiency among these adults living in English-speaking countries.

New data on adult immigrants

For the first time we were able to collect English proficiency data on adults learning English as a second language in predominantly English-speaking countries. This population varies significantly from the rest of the EF EPI because these adults attended school in a variety of settings in their countries of origin, subsequently immigrating to an English-speaking country as older teenagers or adults. Because we do not have historical data on these same individuals, and did not collect demographic information on their countries of origin or year of arrival, we cannot determine what English level these individuals had before immigrating.

Nevertheless, this partial data is interesting in what it shows about the variation between English-speaking countries in the English skills of adult immigrants.

Immigrant birth countries play a role

The non-English-speaking immigrant profile in the four countries varies significantly. The United Kingdom draws large portions of its overseas-born residents from India, Pakistan, and Poland. Australia also has large numbers of immigrants from India, as well as important populations from China and Italy. Canadian immigration from India and China is also strong, but the Philippines is the most common birth country of the Canadian foreign-born population. By contrast a large portion of the adult English learners in the United States were born in Mexico and Central America.

Immigrants in society

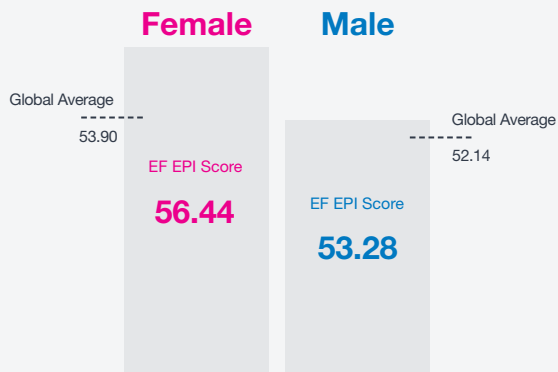
Adult English learners in Australia and Canada have significantly higher levels of English proficiency than in the two other English-speaking countries surveyed. These countries both have high levels of foreign-born people as a percentage of the total population (25% and 19% respectively). Because of this, infrastructure and training schemes for receiving immigrants are well developed.

Immigration policy is a far more politically sensitive issue in the United Kingdom and the United States, despite the fact that these countries have far lower numbers of foreign-born residents as a portion of the total population. The inability to speak English is frequently cited by politicians as an indicator of these adults' unwillingness to embrace the culture of their host countries.

Realistic goals are needed for adult English learners

It is far more likely that these adults simply started from a low level of English proficiency and are struggling to attain the necessary skill level as adults. This is certainly the case for the United States, where English proficiency among adult English learners is lowest. Latin America has the lowest levels of English proficiency of any region in the world, and the inequality in the education systems there is well documented. Adults who attended school in these countries, whether they stay where they are or immigrate, will require years of English training before they can hold a professional position in English, all the more so if they are from disadvantaged backgrounds or ethnic minorities. Recognition among politicians of the challenges facing these adult English learners in their own countries could lead to more appropriate training schemes and less frequent calls for immigrants to "just learn English."

Gender Gap



Women immigrants learn English better than men

Women who are learning English in an English-speaking country are more proficient than men in the same situation. This regional finding also applies to the individual countries except for Australia, where men and women speak English equally well. In Canada, the U.K., and the U.S., women score between 3.5 and 4 points better than men on average. This advantage could be a legacy of a gender gap in their countries of origin, but the data does not support that conclusion. The gap between male and female immigrants living in Canada, the U.K., and the U.S. is wider than in any individual country surveyed, and far wider than the most common immigrant countries of origin—India (0.45 points) and Mexico (0.33 points).

This skill gap is largely due to the differing nature of female and male immigration patterns. Almost 40% of the U.S. immigrant population has less than ten years of formal education. This group is overwhelmingly from Mexico and Central America, where our data shows that English proficiency is low. 68% of these poorly-educated immigrants are men. The remaining 60% of U.S. immigrants have, on average, 15 years of formal education. Only 55% of these skilled migrants are men. So the population of female immigrants, at least in the U.S., is more highly educated before arrival and thus much more likely to speak English. Survey data from the U.K. shows that more women than men participate in adult education programs, hence any advantage women have upon arrival is more likely to be reinforced by formal study in subsequent years.





Conclusions

English proficiency a must in a globalized economy

The ability to communicate in English is a requirement in a globalized economy. The early adopter advantages of English language proficiency are being replaced by economic disadvantages for those who do not speak English. Governments and individuals recognize the trend and are driving the explosion of English language study seen over the past decade.

But despite this explosive growth, little data is available to evaluate how countries are doing in their pursuit of English proficiency. The EF EPI allows us to draw some conclusions about how to do this successfully:

- Ensure that all children attend school and give them an education on par with global standards.
- Teach English in public schools as a required language for all students starting in primary school.
- Train an adequate number of English teachers to a high level of proficiency. Forcing teachers who do not speak English well to instruct students in the language is a waste of time and money.
- Cultivate a culture of multilingualism. The more families and governments do to foster the expectation of everyone speaking more than one language, the more children will expect it of themselves. This culture of multilingualism is difficult to define but easy to recognize. Visitors to very high proficiency countries notice it immediately.
- Recognize that many adults did not receive adequate English training in school. Among adults feeling economic pressure, demand for English learning is already high. They need low barrier paths to training and realistic goals that take into account the years required to master a foreign language. Long-term workplace training programs and adult education scholarships can both be effective strategies. Technology is particularly helpful in enabling adults to improve their skills on their own time.

- Train public sector employees in English. Governments can in this way improve the English skills of a significant portion of working adults and set themselves up as an example of best practices for other employers to follow.
- Teach both communication skills and strategies to negotiate meaning when communication breaks down. To gain maximum benefit from time spent studying English, both students and teachers should place the priority on communication rather than grammatical correctness or native-speaker accent reproduction. Many adults, having studied in a more traditional setting emphasizing grammar over fluency, need extra practice listening and speaking.
- Develop more robust, standardized proficiency assessment methods to recognize and reward effective communication skills over perfect grammar. The conception and adoption of such standardized assessments will reduce student frustration and drive higher quality language instruction in both the public and the private sector.

International testing of English proficiency

International testing of English proficiency not only gives a comparative measure of different education systems and their effectiveness—it also encourages discussion of evaluation standards and learning goals. Like the TIMSS and PISA tests which compare science, math, and reading skills in schoolchildren around the world, and the European Union’s SurveyLang which tests foreign language skills among teenagers, the EF EPI aims to compare adult English proficiency on a global scale. We welcome others with data on English learning around the world to join the conversation in the hope that together we can improve the efficiency and effectiveness of English study for hundreds of millions of people worldwide.

More robust, standardized assessment methods are needed to recognize communication skills over grammatical correctness.

About the Index

This is the second edition of the EF English Proficiency Index.

Methodology

The EF English Proficiency Index calculates a country's average adult English skill level using data from three different EF English tests completed by hundreds of thousands of adults every year. Two tests are open to any internet user for free. The third is an online placement test used by EF during the enrollment process before students start an English course. All three include grammar, vocabulary, reading, and listening sections. The online placement test is a 30-question adaptive exam, so each student's questions are adjusted in difficulty according to his previous correct and incorrect answers. The two non-adaptive tests are 60 and 70 questions in length. All scores have been validated against EF's course levels. The test administration is identical for all three tests with students completing the exam on their own computers at home. There is no incentive for students to artificially inflate their scores on these low-stakes tests by cheating or cramming as the results do not lead to certification or admission to a program.

Test takers

The EF EPI was calculated using combined test-taker data from 2009 to 2011 inclusive. Test results from 1,668,798 test takers across 52 countries and two territories were included. Separate test data was gathered from 91,379 adult English learners living in four predominantly English-speaking countries. Demographic information was gathered on approximately one-fourth of all test takers and included age, gender, and city of residence.

Only countries with a minimum of 400 test takers were included in the index. Countries with less than 100 test takers per test on each of the three tests were also excluded, regardless of the total number of test takers.

We recognize that the test-taking population represented in this index is self-selected and not guaranteed to be representative of the country as a whole. Only those people either wanting to learn English or curious about their English skills will participate in one of these tests. This would tend to skew scores lower than for the general population, since those who are confident in English are unlikely to pursue English lessons.

In addition, because the tests are online, people without internet access or unused to online applications are automatically excluded. In countries

where internet usage is low, the impact is logically the strongest. These biases would tend to skew scores higher than for the general population, excluding poorer, less educated, and less privileged people.

Score calculation

In order to calculate a country's EF EPI score, each test score was normalized to obtain a percentage correct for that test according to the total number of questions. All the scores for a country were then averaged across the three tests, giving an equal weight to each test.

Each country is assigned to a proficiency band based on its score. These proficiency bands allow recognition of groups of countries with similar English skill levels and comparison within and between regions. The proficiency bands are aligned to the Common European Framework of Reference (CEFR) and EF's course levels. The Very High proficiency band corresponds to CEFR level B2. High, Moderate, and Low proficiency bands correspond to CEFR level B1, with each corresponding to a single EF course level. The Very Low proficiency band corresponds to CEFR level A2. See below for more detail about what English speakers in each band can do.

Scores for gender and age groups were calculated in the same way as overall scores, giving equal weight to the data sets from each test. When regional scores were calculated, these weighed each test taker equally, so countries with more test takers made up a larger portion of the overall score for the region than countries with less test takers.

EF Education First

EF Education First (EF) was established in 1965 with the mission to break down barriers in language, culture, and geography. With 400 schools and over 20 million students, EF specializes in language schools, academic degrees, educational travel, and cultural exchange.

EF English First and EF Englishtown are divisions of EF Education First, committed to teaching English around the world. In addition to helping 1,500 corporations with English training, EF is the Official Language Training Supplier to the Sochi 2014 Winter Olympics.

For more information, please see www.ef.com/epi and www.englishtown.com.

CEFR levels and can-do statements

Proficient User

- C2** Can understand with ease virtually everything heard or read. Can summarize information from different spoken and written sources, reconstructing arguments and accounts in a coherent presentation. Can express him/herself spontaneously, very fluently and precisely, differentiating finer shades of meaning even in more complex situations.
- C1** Can understand a wide range of demanding, longer texts, and recognize implicit meaning. Can express him/herself fluently and spontaneously without much obvious searching for expressions. Can use language flexibly and effectively for social, academic, and professional purposes. Can produce clear, well-structured, detailed text on complex subjects, showing controlled use of organizational patterns, connectors, and cohesive devices.

Independent User

- B2** Can understand the main ideas of complex text on both concrete and abstract topics, including technical discussions in his/her field of specialization. Can interact with a degree of fluency and spontaneity that makes regular interaction with native speakers quite possible without strain for either party. Can produce clear, detailed text on a wide range of subjects and explain a viewpoint on a topical issue giving the advantages and disadvantages of various options.
- B1** Can understand the main points of clear standard input on familiar matters regularly encountered in work, school, leisure, etc. Can deal with most situations likely to arise while travelling in an area where the language is spoken. Can produce simple connected text on topics which are familiar or of personal interest. Can describe experiences and events, dreams, hopes, and ambitions and briefly give reasons and explanations for opinions and plans.

Basic User

- A2** Can understand sentences and frequently used expressions related to areas of most immediate relevance (e.g., very basic personal and family information, shopping, local geography, employment). Can communicate in simple and routine tasks requiring a simple and direct exchange of information on familiar and routine matters. Can describe in simple terms aspects of his/her background, immediate environment, and matters in areas of immediate need.
- A1** Can understand and use familiar everyday expressions and very basic phrases aimed at the satisfaction of needs of a concrete type. Can introduce him/herself and others and can ask and answer questions about personal details such as where he/she lives, people he/she knows and things he/she has. Can interact in a simple way provided the other person talks slowly and clearly and is prepared to help.

Quoted from the Council of Europe

All countries in the 2012 EF EPI fell into bands corresponding to levels A2-B2. No countries had average scores placing them at either the lowest level, A1, or the highest two levels, C1 & C2.

Appendix

Comparison with the previous EF EPI

After the release of the first EF EPI in Spring 2011, we adjusted our methodology in two significant ways in response to feedback received.

First, educators wanted more detail about the language competencies of each proficiency band. The EF EPI 2012 uses the same five proficiency band labels, but in this edition they have been aligned directly to the Common European Framework of Reference (CEFR).

This alignment to a universally recognized framework allows educators and government officials to interpret their EF EPI results with greater precision. More detailed information about the tasks which English learners can perform at each EF EPI band is available from the Council of Europe.

The second important change is that one of the four English tests used in the previous EF EPI was not included in this edition. That test had an optional listening section, which many test takers did not complete. The listening section was a minor portion of the overall score, even when completed. The three remaining tests, identical in the two editions of the EF EPI, all place a far greater emphasis on listening skills. Countries which rose significantly in the rankings benefitted from the increased value attributed to listening skills. Those which fell significantly demonstrated weaker listening skills. Most countries did not see significant shifts in ranking, as would be expected over the short time frame.

Please email epi@ef.com or call +852 2111 2370 with any comments or questions.

EF EPI Rankings

Comparisons V.1 vs. V.2

Country	V.1 Rank (07-09)	V.2 Rank (09-11)	Rank Change	V.1 Score (07-09)	V.2 Score (09-11)	Score Change
Algeria	—	44	new	—	47.13	new
Argentina	16	20	-4	53.49	55.38	1.89
Austria	6	7	-1	58.58	62.14	3.56
Belgium	7	6	1	57.23	62.46	5.23
Brazil	31	46	-15	47.27	46.86	-0.41
Chile	36	39	-3	44.63	48.41	3.78
China	29	36	-7	47.62	49	1.38
Colombia	41	50	-9	42.77	45.07	2.30
Costa Rica	22	34	-12	49.15	50.15	1.00
Czech Republic	19	11	8	51.31	58.9	7.59
Denmark	3	2	1	66.58	67.96	1.38
Dominican Republic	33	—	—	44.91	—	—
Ecuador	37	43	-6	44.54	47.19	2.65
Egypt	—	48	new	—	45.92	new
El Salvador	28	41	-13	47.65	47.31	-0.34
Finland	5	4	1	61.25	64.37	3.12
France	17	23	-6	53.16	54.28	1.12
Germany	8	9	-1	56.64	60.07	3.43
Guatemala	27	47	-20	47.80	46.66	-1.14
Hong Kong	12	25	-13	54.44	53.65	-0.79
Hungary	20	8	12	50.80	60.39	9.59
India	30	14	16	47.35	57.49	10.14
Indonesia	34	27	7	44.78	53.31	8.53
Iran	—	28	new	—	52.92	new
Italy	23	24	-1	49.05	54.01	4.96
Japan	14	22	-8	54.17	55.14	0.97
Kazakhstan	44	—	—	31.74	—	—
Kuwait	—	45	new	—	47.01	new
Libya	—	54	new	—	42.53	new
Malaysia	9	13	-4	55.54	57.95	2.41
Mexico	18	38	-20	51.48	48.6	-2.88
Morocco	—	35	new	—	49.4	new
Netherlands	2	3	-1	67.93	66.32	-1.61
Norway	1	5	-4	69.09	63.22	-5.87
Pakistan	—	17	new	—	56.03	new
Panama	40	51	-11	43.62	44.68	1.06
Peru	35	33	3	44.71	50.55	5.84
Poland	10	10	0	54.62	61.75	7.13
Portugal	15	19	-4	53.62	55.39	1.77
Qatar	—	37	new	—	48.79	new
Russia	32	29	3	45.79	52.78	6.99
Saudi Arabia	26	52	-26	48.05	44.6	-3.45
Singapore	—	12	new	—	58.65	new
Slovakia	21	16	5	50.64	56.62	5.98
South Korea	13	21	-8	54.19	55.35	1.16
Spain	24	18	6	49.01	55.89	6.88
Sweden	4	1	3	66.26	68.91	2.65
Switzerland	11	15	-4	54.60	57.39	2.79
Syria	—	42	new	—	47.22	new
Taiwan	25	30	-5	48.93	52.42	3.49
Thailand	42	53	-11	39.41	44.36	4.95
Turkey	43	32	11	37.66	51.19	13.53
U.A.E.	—	49	new	—	45.53	new
Uruguay	—	26	new	—	53.42	new
Venezuela	38	40	-2	44.43	47.5	3.07
Vietnam	39	31	8	44.32	52.14	7.82

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Special thanks to Kate Bell, Eric Feng, Dr. Christopher McCormick, Ming Chen, Ku Chung, and Britt Hult.

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