



EF EPI

EF English Proficiency Index

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2014



P.10 BRIC



P.22 LATIN AMERICA



P.18 EUROPE

TABLE OF CONTENTS

04	About the EF EPI Fourth Edition
06	Executive Summary
08	EF EPI 2014 Rankings
10	Brazil, Russia, India, and China
14	Asia
18	Europe
22	Latin America
26	Middle East and North Africa
30	English and Economic Competitiveness
32	English and Business
34	English and Quality of Life
36	English and Public Education
37	English and Technology
38	Conclusions
40	Looking Ahead: The EF EPI and Innovation in Language Assessment
42	Appendix A: About the Index
43	Appendix B: CEFR Levels and Can-Do Statements
44	Appendix C: EF EPI Country Scores
46	Appendix D: Selected References

ABOUT THE EF EPI FOURTH EDITION

This fourth edition of the EF English Proficiency Index (EF EPI) ranks a total of 63 countries and territories. To create these country rankings, we used test data from 750,000 adults, aged 18 and above, who took our English tests in 2013. We also look back seven years to 2007, the first year from which we have EF EPI data, to see which countries and regions have improved and which have not. For more on methodology, see “About the Index” on page 42.

In the first section, we analyze the regional trends that have emerged in Asia, Europe, Latin America, the Middle East, and North Africa, as well as the BRIC countries (Brazil, Russia, India, and China). These sections illustrate the diversity of challenges and strategies involved in training a globalized workforce.

After the regional analyses, we examine the correlations between English proficiency and a number of social and economic measures, including income, ease of doing business, quality of life, years of schooling, and Internet usage.

Finally, we look ahead to next year, when the EF EPI will for the first time use the EF Standard English Test, a new English assessment that we have developed to give more language learners access to high-quality English testing.





EXECUTIVE SUMMARY

The EF EPI fourth edition ranks 63 countries and territories by adult English proficiency.



In 2014, English is increasingly considered a core competency in a globalized economy, but different countries approach teaching English differently, each with its own concerns, constraints, and solutions. In some cases, an international spotlight, such as the Olympics or the World Cup, becomes a platform for adult learning initiatives. In others, economic pressures encourage countries to use English as a catalyst for internationalization and growth. Meanwhile, in country after country, officials discuss whether English is a threat to their national language, ponder how to train enough teachers to launch new initiatives in the classroom, and struggle to build adequate assessment tools.

As discussion about the teaching of English continues in education ministries, parents doggedly invest in after-school programs that allow their children to practice speaking English. Graduate students head overseas. Ambitious professionals spend their evenings studying online, and companies pay a premium for candidates who are proficient in English. There is still a wide gap between the English language education provided by most school systems and the expectations of parents, students, and employers.

In this fourth edition of the EF English Proficiency Index, many of the regional and demographic trends that were examined in previous editions are confirmed. In addition to producing the annual international index, we have updated our analysis of regional English levels and the English gap between genders and generations. The latest data show us that:

- Worldwide, English proficiency among adults is rising, although this increase is far from uniform in all countries and all populations.
- Women speak better English than men worldwide and in nearly every country surveyed. This gender skill gap is significant enough to have an impact in the workplace. Understanding the causes of men's poorer English levels is the first step in finding solutions.
- Worldwide, mid-career adults have stronger English skills than any other age group. This finding raises questions about the workplace readiness of young graduates. It also illustrates that adults can improve their skills outside of a traditional school setting.

- Europe's English proficiency remains far higher than other regions', and it continues to improve.

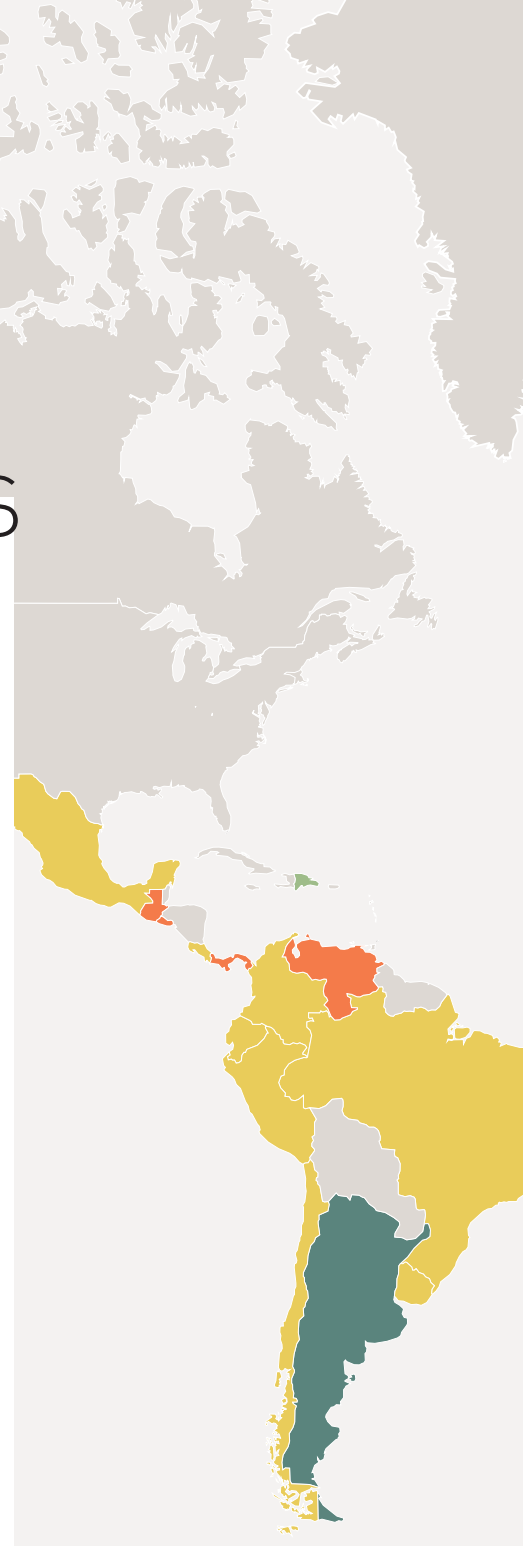
- Asian countries have a wide range of proficiency levels, from high to very low, with dramatic progress alongside persistent stagnation.

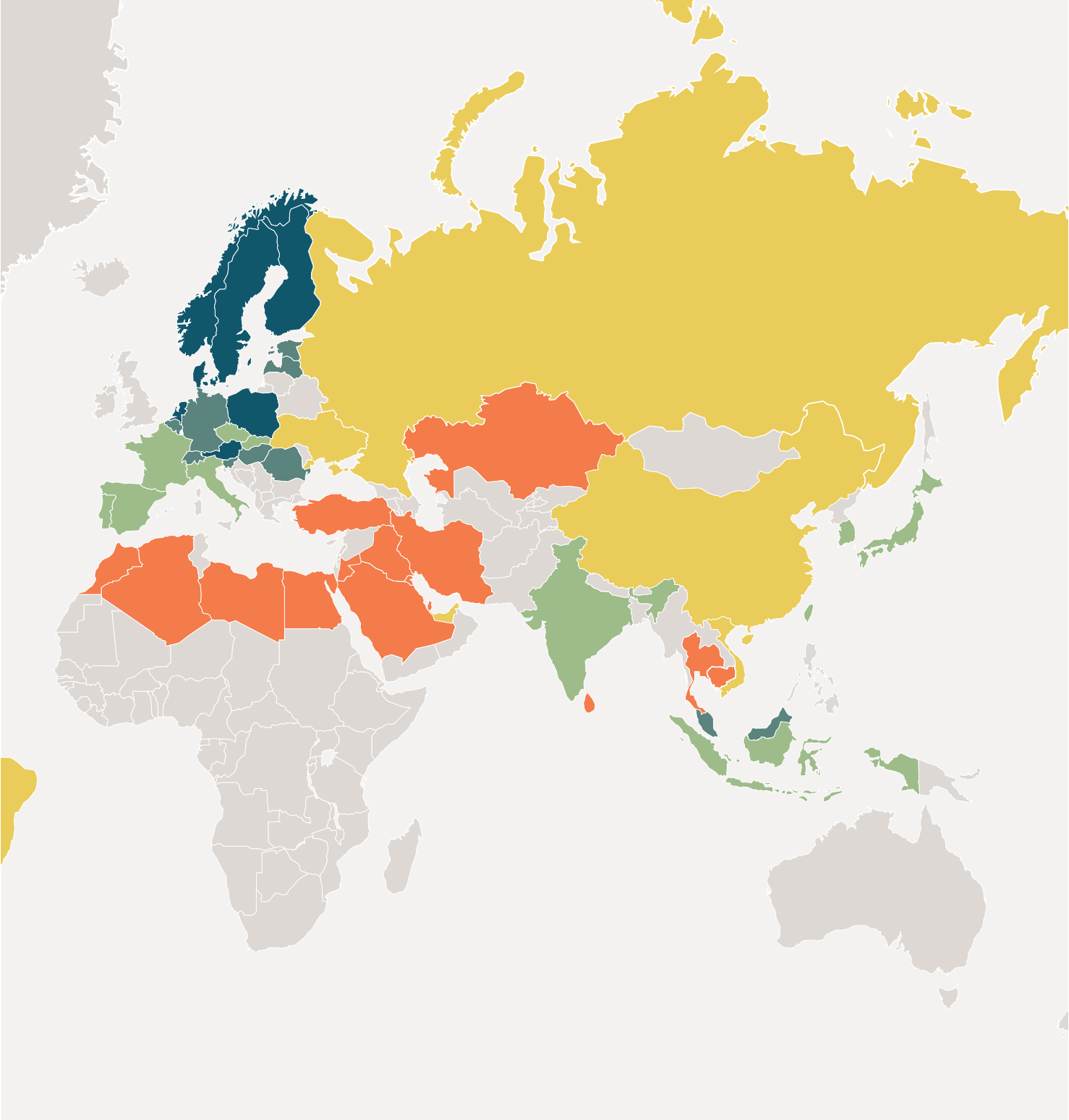
- Almost all countries in Latin America, the Middle East, and North Africa have low or very low English proficiency. Although a few countries are improving in these regions, most are not.

- There are strong correlations between English proficiency and income, quality of life, ease of doing business, Internet usage, and years of schooling. These correlations are remarkably stable over time.

EF EPI 2014 RANKINGS

VERY HIGH PROFICIENCY			LOW PROFICIENCY		
01	Denmark	69.30	32	U.A.E.	51.80
02	Netherlands	68.99	33	Vietnam	51.57
03	Sweden	67.80	34	Peru	51.46
04	Finland	64.40	35	Ecuador	51.05
05	Norway	64.33	36	Russia	50.44
06	Poland	64.26	37	China	50.15
07	Austria	63.21	38	Brazil	49.96
HIGH PROFICIENCY			39	Mexico	49.83
08	Estonia	61.39	40	Uruguay	49.61
09	Belgium	61.21	41	Chile	48.75
10	Germany	60.89	42	Colombia	48.54
11	Slovenia	60.60	43	Costa Rica	48.53
12	Malaysia	59.73	44	Ukraine	48.50
13	Singapore	59.58	VERY LOW PROFICIENCY		
14	Latvia	59.43	45	Jordan	47.82
15	Argentina	59.02	46	Qatar	47.81
16	Romania	58.63	47	Turkey	47.80
17	Hungary	58.55	48	Thailand	47.79
18	Switzerland	58.29	49	Sri Lanka	46.37
MODERATE PROFICIENCY			50	Venezuela	46.12
19	Czech Republic	57.42	51	Guatemala	45.77
20	Spain	57.18	52	Panama	43.70
21	Portugal	56.83	53	El Salvador	43.46
22	Slovakia	55.96	54	Kazakhstan	42.97
23	Dominican Republic	53.66	55	Morocco	42.43
24	South Korea	53.62	56	Egypt	42.13
25	India	53.54	57	Iran	41.83
26	Japan	52.88	58	Kuwait	41.80
27	Italy	52.80	59	Saudi Arabia	39.48
28	Indonesia	52.74	60	Algeria	38.51
29	France	52.69	61	Cambodia	38.25
30	Taiwan	52.56	62	Libya	38.19
31	Hong Kong	52.50	63	Iraq	38.02





PROFICIENCY BANDS

Very High

High

Moderate

Low

Very Low



BRAZIL
RUSSIA
INDIA
CHINA

BRIC COUNTRIES' REFORMS SHOW PROMISE

The BRICs deserve special mention as a group because they are among the world's ten largest economies, and because together they account for nearly half of the world's population. Three of the four BRIC countries have recently hosted or will soon host the Olympics (Beijing 2008, Sochi 2014, and Rio de Janeiro 2016), and these three countries have all used the Games as a catalyst for widespread English language training.

Due to large public and private spending on training, English language skills are improving steadily across the BRICs. All four countries have higher EF EPI scores than they did seven years ago, with each gaining at least 2.50 points. India in particular has made significant progress; it lagged behind China in 2007 but has emerged in the past two years as the leader of the BRICs. Despite these improvements, the adult English skills of Brazil, China, and Russia remain low, with India only moderately outpacing them.

Like other growing economies, the BRICs need a competitive, English-speaking workforce. Because internationalization is an important element of development, both government and private sectors have invested heavily in English language training.

BRAZIL

When the Brazilian government initiated the Science Without Borders program to send 100,000 science, technology, engineering, and mathematics (STEM) students abroad, it discovered that many students could not qualify for the program due to low English proficiency levels. The Brazilian Ministry of Education then implemented English Without Borders, which offers online English courses to 5 million university students and free TOEFL tests to 500,000 students who want to study abroad. In the private sector, large international corporations are acquiring private schools, and they have grown Brazil's English language education market to 3 billion USD, making it the largest in Latin America.

CHINA

China's English training market, estimated at 7.5 billion USD, is dense and well developed across the country. However, recent changes to the English requirements for university admissions have led to a surge of public discussion about how much students should focus on learning English. A group of top Chinese universities has dropped

the English test from its independent entrance examinations for certain degree programs, especially in engineering and the arts, while maintaining the test for other fields. Starting in 2016, Beijing's education authorities are planning to reduce the weight of the English section of the standardized college entrance exam (*gaokao*). Other provinces are considering similar moves. It remains to be seen what impact these policy changes will have on primary and secondary school curricula and the private English training industry.

RUSSIA

In recent years, English has become vital for Russia's globalizing market. Hundreds of Russian websites offer live private lessons in response to new business and travel opportunities. These private online courses vary in quality, but most claim that they offer interactive lessons with a stronger emphasis on listening and speaking skills. Though the English training market in Russia is valued at more than 300 million USD, and currently expanding, it is still small compared to other BRIC countries. It is also concentrated in affluent cities; Moscow and St. Petersburg make up more than 50% of the market.

INDIA

Because of its colonial history, India is thought of as an English-speaking country. The most reliable data shows, however, that even during the colonial period, fewer than 5% of Indians spoke any English. India has emerged in recent years as the world's second-largest English-speaking country, with more than 125 million English speakers (about 10% of its population). One of the world's most linguistically diverse countries, India uses 75 languages in its education system. English, the most commonly taught foreign language, is included in the curricula of 33 out of 35 states. A rise in the popularity of private schools using English as the medium of instruction has driven state governments to switch more public

schools to using English as well. This focus on English has led to a general improvement in English skills, but there are still major challenges, chief among them a national shortage of English teachers.

CHALLENGES AHEAD

The BRIC countries share several challenges in increasing English proficiency among their citizens. In all BRIC countries, the quality of English training in public schools varies immensely between rich and poor, and between urban and rural, regions. These countries are all physically large as well as culturally diverse, making the application of a universal teaching standard an enormous challenge. Faced with intensified competition to attract the best students, top universities are adopting English as the medium of instruction, but professors' preparedness for teaching in English varies widely.

Though many BRIC teachers are now being trained on communicative teaching methods, they are not always able to put those methods to use due to large class sizes (60-80 students per class in some cases), rigid curricula and teaching materials, and grammar-focused standardized tests. Many teachers struggle to give students the speaking practice they need to improve their communication skills.

The need for English proficiency across these large, growing economies is ubiquitous. Adults in the BRIC countries have improved their English skills over the past seven years, but most are still not strong enough English speakers to use their English professionally. To turn English into a competitive advantage for these large workforces, education officials must continue to improve the English skills of public school teachers, revise high-stakes exams to emphasize communication skills, and create real opportunities for teachers to use communicative methodologies in class.

BRIC

EF EPI Rank

India #25
Russia #36
China #37
Brazil #38



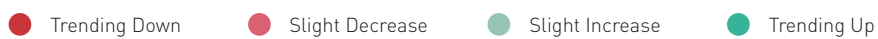
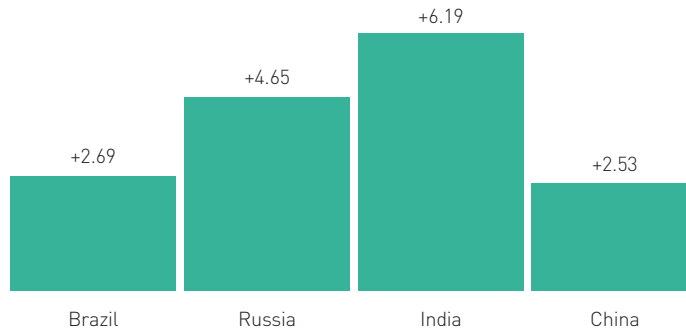
PROFICIENCY BANDS



EF EPI TRENDS

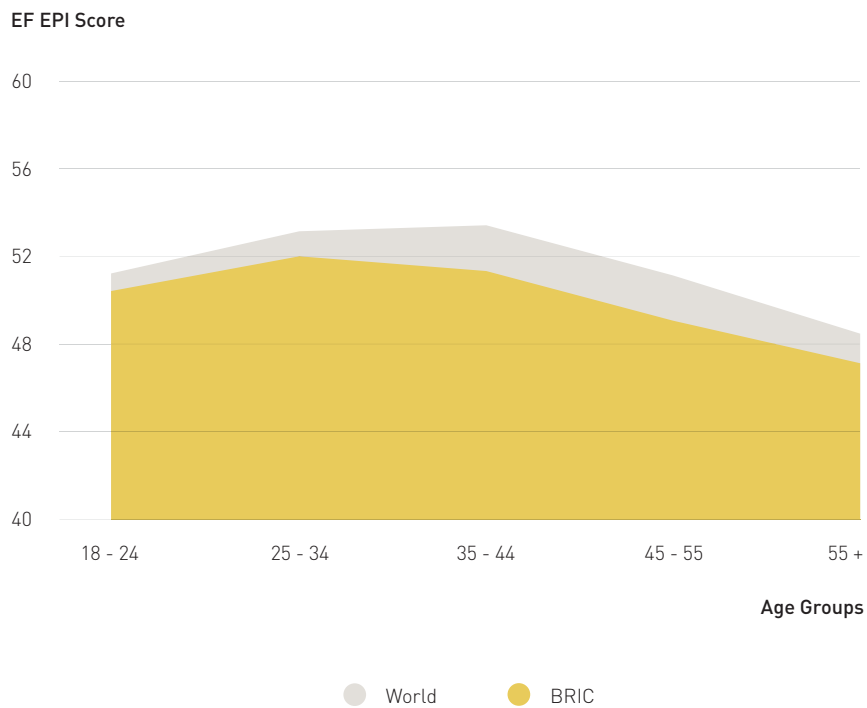
All four countries have higher EF EPI scores than they did seven years ago, with each gaining at least 2.50 points. Despite these improvements, the adult English skills of Brazil, China, and Russia remain low, with India only moderately outpacing them.

EF EPI Score Change



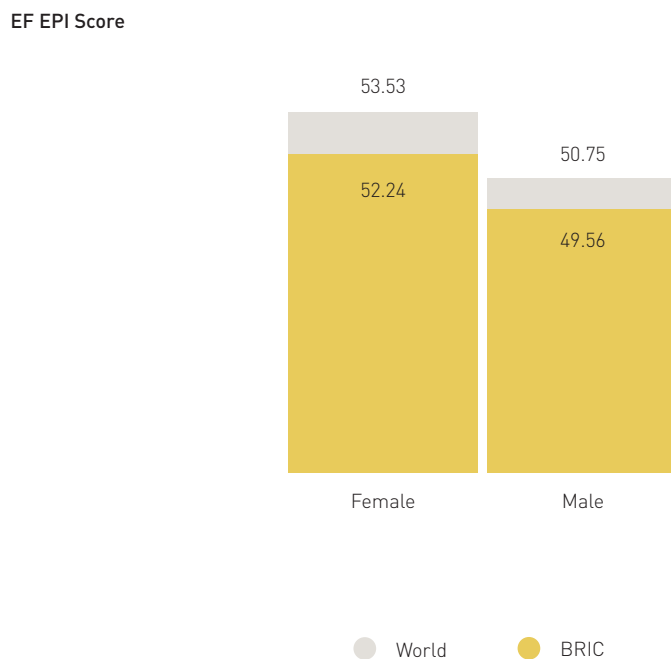
ENGLISH BY AGE

Mid-career professionals (aged 25-34 and 35-44) have the highest English proficiency levels. Young adults (aged 18-24) are slightly behind, and, unsurprisingly, those older than 44 have the lowest English levels. All BRIC age groups fall below the global averages.



ENGLISH BY GENDER

Across the BRIC countries, there is a significant gender gap ($p < 0.001$). Women are more proficient than men, but both genders are below the global averages.





ASIA

ASIA CONTINUES TO INVEST HEAVILY IN TRAINING

Asia's adult English skills are improving steadily, although the rate of improvement varies widely from country to country. Since 2007, the regional average EF EPI score has risen 3.52 points, a gain comparable to that of Europe. English, rather than an Asian language, is the lingua franca of the continent. Two major intra-Asian institutions—the Asia-Pacific Economic Cooperation (APEC) and the Association of Southeast Asian Nations (ASEAN)—use English as their official language.

Bucking the regional trend, some of the wealthiest parts of Asia are failing to show marked improvements in English proficiency. According to last year's OECD Programme for International Student Assessment (PISA) results, Asia has some of the world's strongest education systems, with Hong Kong, Japan, Shanghai, Singapore, South Korea, and Taipei occupying the top positions in reading, math, and science. However, of these, only Singapore has high English proficiency. Hong Kong, Japan, and South Korea have not improved over the past seven years despite large investments in English education. This performance gap raises questions about how English teaching differs from the teaching of other subjects.

Three Southeast Asian countries stand out for their progress. Indonesia, Thailand, and Vietnam have all gained more than seven points in the past seven years, some of the fastest improvement in the world. During this period, Indonesia caught up to Hong Kong, Japan, and Taiwan.

VIETNAM SETS RADICAL REFORM

Vietnam's debut appearance on the PISA rankings last year surprised everyone. The country ranked 17th out of 65 countries and territories, outscoring the U.K. and the U.S. in reading, math, and science. Vietnam is the poorest country that participated in the PISA study, with a GDP per capita of 1,600 USD.

Vietnam has also made significant headway in English language education, and the government intends to further that progress. In 2008, the Vietnamese government passed Decision 1400, which declared that by 2020, "foreign languages [will be] a comparative advantage of development for Vietnamese people." The government plans to spend 450 million USD between 2008 and 2020 on

language learning, and 85% of that budget has been dedicated to teacher training.

"English is the most important business language in the world. Vietnam, in the process of globalization, is committed to reforming language education to focus on teaching English for communication purposes," writes Dr. Tu Anh Thi Vu, Executive Director of Vietnam's National Foreign Languages Project 2020.

However, Dr. Hung Ngoc Nguyen, founding executive manager of Project 2020, adds a note of caution: "I'm not sure if [Project 2020] will be successful. Other countries have spent billions on English language teaching in the private sector, but governments still have been very unhappy with the outcomes."

HONG KONG TRAILS SHANGHAI

Dr. Nguyen's observation is particularly true for Hong Kong, Japan, and South Korea, which have not shown improvements in English levels over the past seven years despite large investments in training. Hong Kong has slipped steadily since 2007. Meanwhile, as China's average English level improves and its bilingual workforce expands, major Chinese cities such as Beijing and Shanghai are developing as premier international Asian business hubs, a role Hong Kong has shared with Singapore for decades.

Joe Ngai, Managing Partner of McKinsey & Company, Hong Kong, drew headlines in 2013 when he remarked that he would rather hire top Mainland Chinese graduates, with superior Mandarin and English skills, than Hong Kong graduates. This year, for the first time ever, adults in Shanghai have higher English proficiency than those in Hong Kong, and adults in Beijing and Tianjin score as well as their Hong Kong counterparts. [For more

details, see the China fact sheet on www.ef.com/epi.]

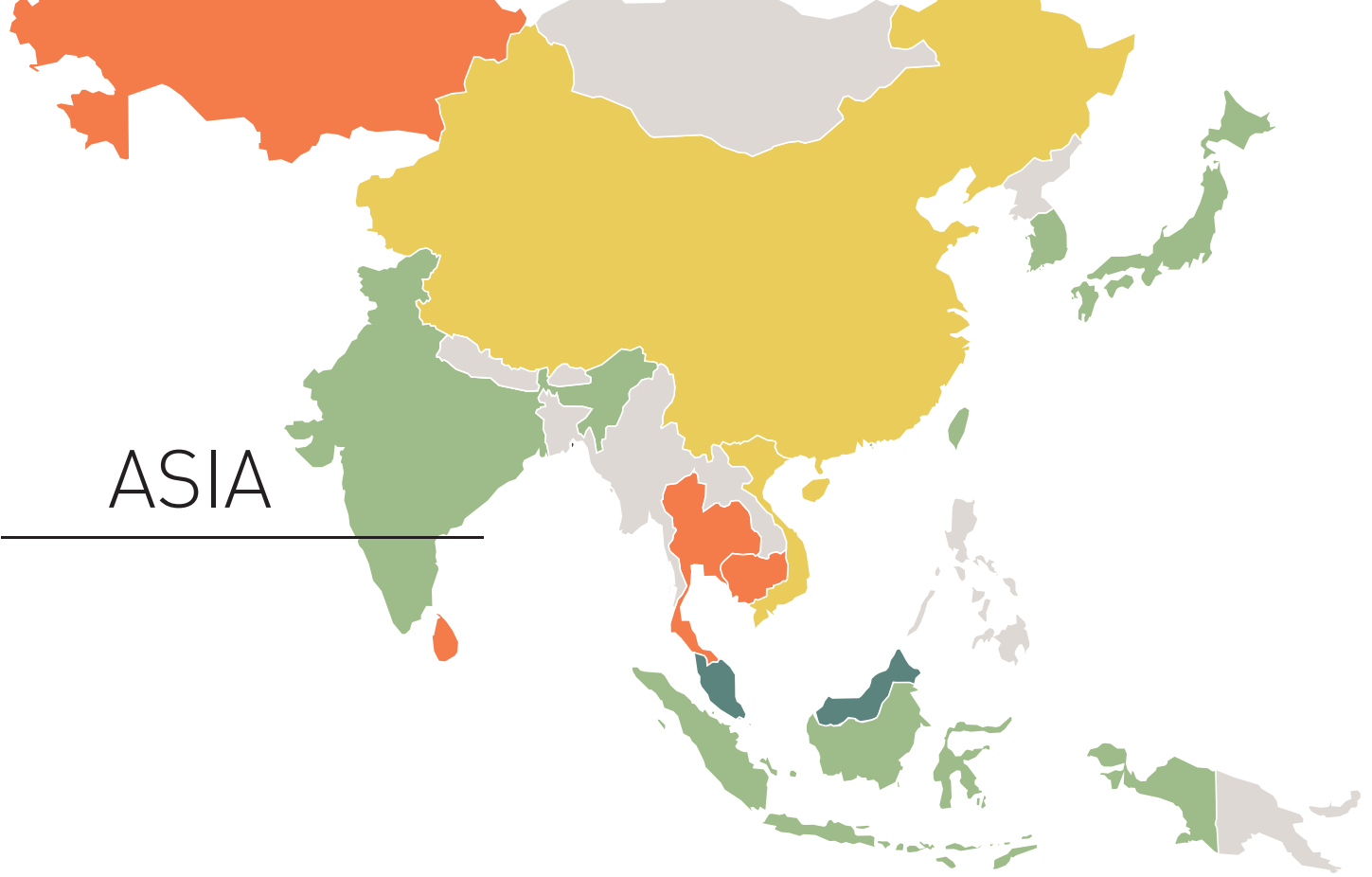
SOUTH KOREA AND JAPAN STAGNATE

South Korea spends more private dollars per capita on English learning than any other country. Yet its EF EPI score has stagnated. To improve English education in South Korea, language education experts agree that teachers must be trained to help students develop practical communication skills, and they must be freed from high-stakes exams that focus primarily on grammar and vocabulary.

The Japanese education system faces similar difficulties in teaching English. To revamp its traditional teaching methodologies, Japan has recently implemented new reforms. Earlier this year, the Japanese education ministry held an unprecedented four-month trial, conducting some of its meetings on English education in English. A few leading universities, including Meiji University and Ritsumeikan University, are beginning to offer undergraduate programs that are taught exclusively in English. And with the 2020 Tokyo Summer Olympics on the horizon, English training has begun to attract additional funding and media attention.

With their increasing economic and political influence, Asian countries have much to gain from improving their English proficiency. The region includes high-performing countries such as Malaysia and Singapore, as well as very weak countries such as Thailand and Cambodia. Asia's English levels may be varied, but every country in the region seems to understand the importance of English for continued growth and development.

ASIA



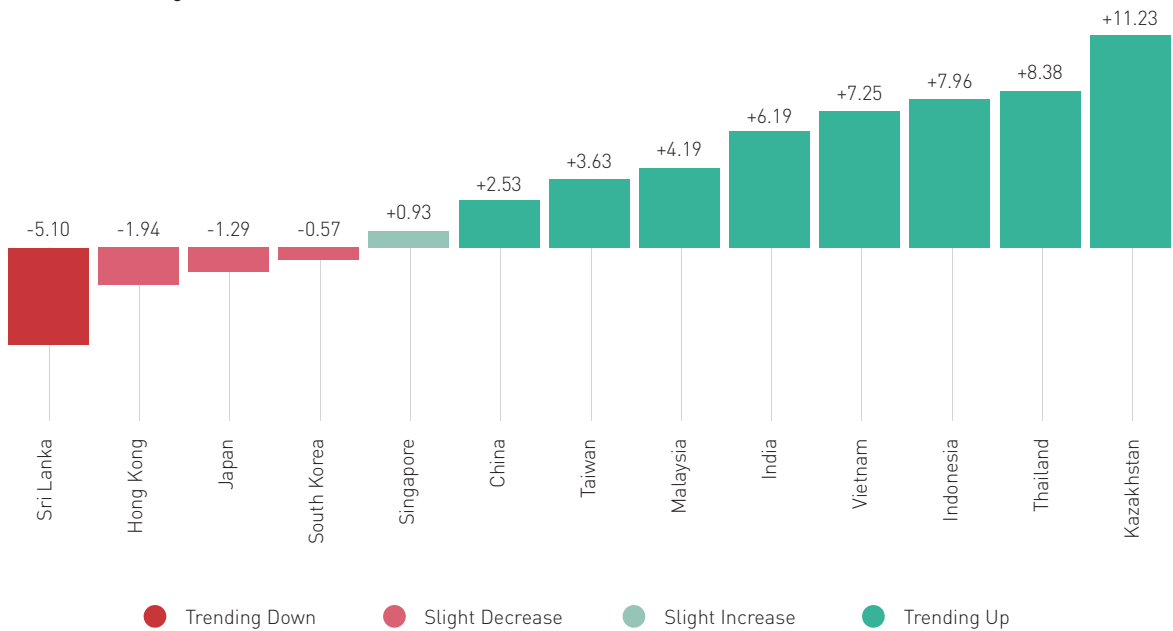
PROFICIENCY BANDS

- Very High
- High
- Moderate
- Low
- Very Low

EF EPI TRENDS

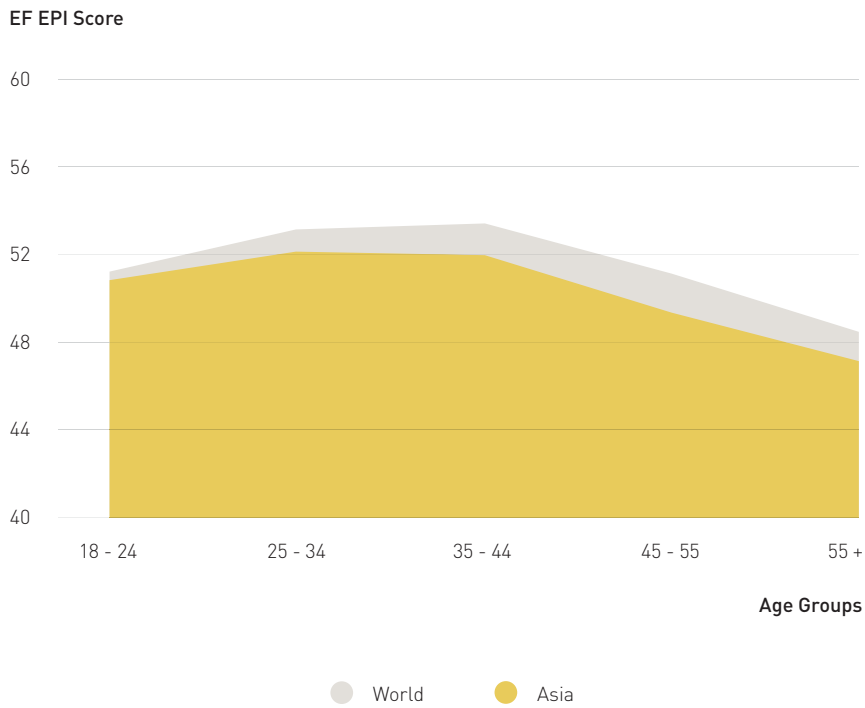
Since 2007, the Asian regional average EF EPI score has risen 3.52 points, a gain comparable to that of Europe. Bucking the regional trend, some of the wealthiest parts of Asia are failing to show marked improvement in English proficiency.

EF EPI Score Change



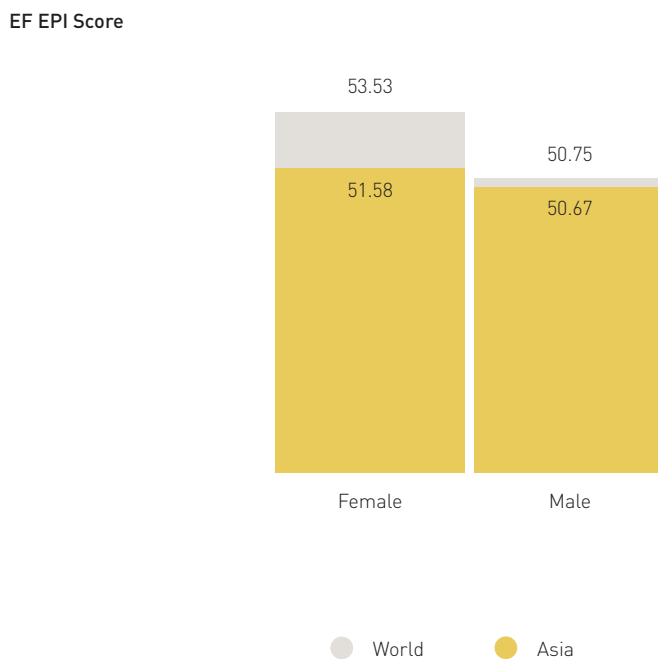
ENGLISH BY AGE

The Asian generation gap follows the global trend: mid-career professionals (aged 25-34 and 35-44) have the highest English proficiency level, followed by young adults (aged 18-24) and then those 45 and above. All Asian age groups are behind the global averages.



ENGLISH BY GENDER

Asian women perform better than Asian men ($p < 0.01$), but the Asian gender gap is much smaller than the global gender gap, mostly because Asian women score nearly two points below the global female average.





EUROPE

EUROPE STILL HAS THE BEST ENGLISH

European adult English proficiency is remarkably strong. Europe has 19 of the top 22 countries in this year's index, as well as all of the world's very high proficiency countries. Despite its already strong English skills, Europe continues to improve. Since 2007, Europe's average proficiency level has risen 3.59 points. Many countries, including Austria, Belgium, Germany, Italy, and Switzerland, have made proficiency gains consistent with this regional average.

POLAND, HUNGARY, AND SPAIN IMPROVE THE MOST

Three countries stand out in Europe for their rapidly improving English skills. Poland's English proficiency level has improved more than any other country's in Europe since 2007. This finding is in line with other education indicators that have tracked the country's transformation. Poland's latest PISA scores in math, reading, and science are some of the highest in Europe.

Poland overhauled its education system in the 1990s and 2000s with the aim of keeping students motivated through the end of secondary school, growing the university population, and improving equality in education outcomes. As a result, the Polish workforce is increasingly equipped for international mobility and trade, and Poland's economy is one of the fastest growing in Europe.

Hungarian adults have also improved their English proficiency more than most Europeans. Sweeping education reforms in Hungary, which aligned its university system with European standards, have required the introduction of foreign languages at the lower and upper secondary levels in all tracks. Universities in Hungary now require students to demonstrate adequate foreign language skills before receiving their degrees. Although Hungary still faces challenges in education, integrating foreign languages into the curriculum at all levels is already having an impact on adult English skills.

Spain, too, is seeing the results of a significant change in attitude toward English language education. The Spanish government has defined English as one of seven basic skills, alongside Spanish and math. Starting in 1995, some regions in Spain began turning public primary schools

into bilingual schools, in which students spend 30% of their day in English. Madrid intends for half of all public schools to be bilingual by 2015. Although other economic factors are hampering Spain's recovery, training young people in essential skills for a globalized economy is undoubtedly a wise investment.

NORWAY BUCKS REGIONAL TREND

While some European countries are particularly focused on improving their English skills and almost all are improving steadily, two stand out as counter-examples. Norway is the only European country to experience a significant decline in English proficiency over the past seven years (-4.76 points). This finding is all the more striking because Norwegian adults tend to speak English well.

However, our results are not the only signs of problems in the Norwegian education system. Over the past two decades, Norwegian schools have been sharply criticized by the OECD for their emphasis on equality rather than quality. The country's performance on math, science, and reading are average for the OECD, despite the fact that Norway spends far more per pupil than other OECD countries.

In the past decade, the realignment of the Norwegian university curriculum with European standards has had a major impact on high school and university failure rates, which are currently above 30%. A series of reforms has been passed to raise the quality of the education system, but teachers have resisted their implementation. Although Norway's English skills remain some of the strongest in the world, if young people are not being adequately trained in English in school, we can expect to see a continued decline in adult English proficiency over the coming years.

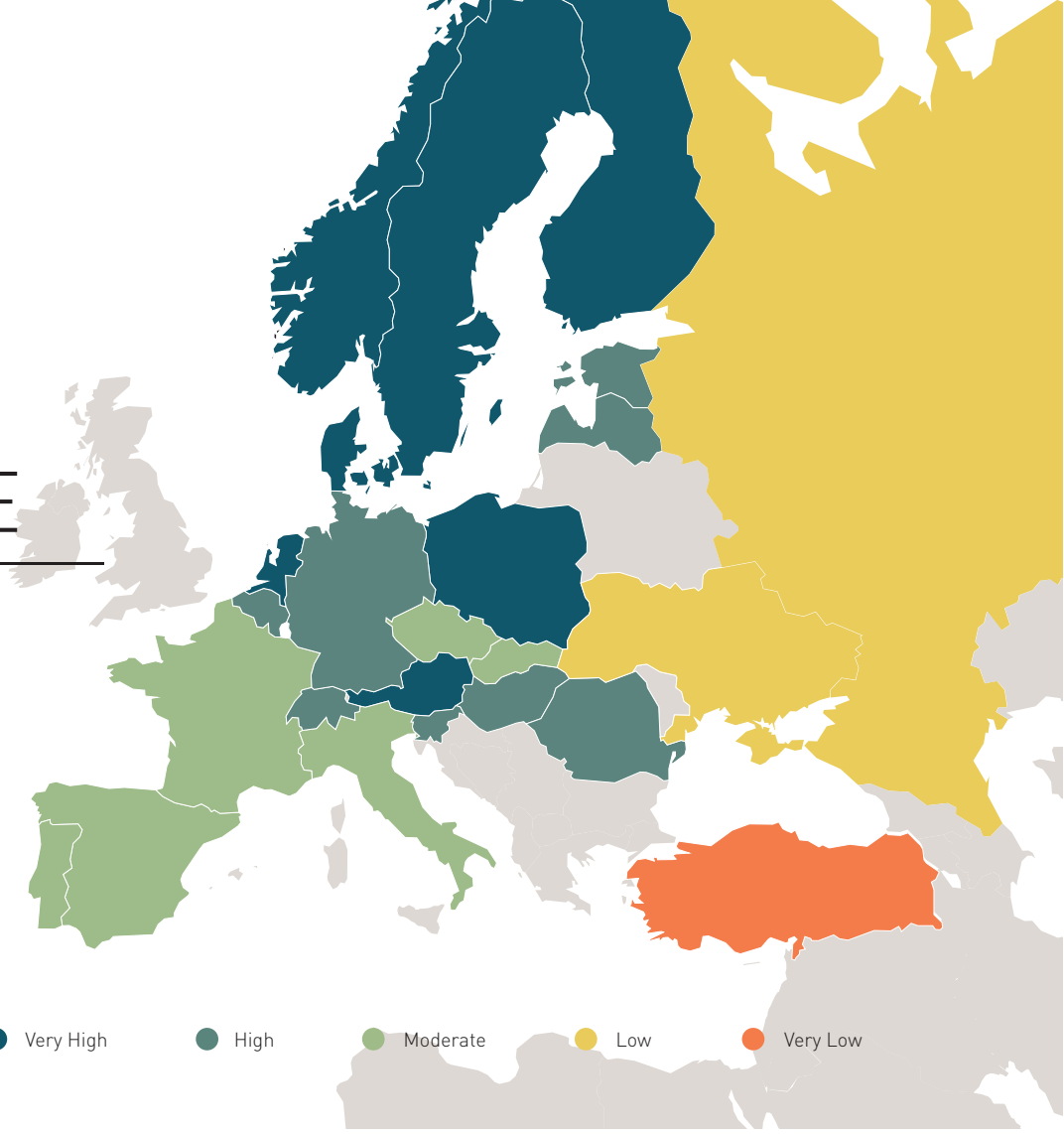
FRANCE NEARLY LAST IN EUROPE

France is also bucking the regional trend, not by declining, but by stagnating. Currently the weakest European Union country in adult English proficiency, France appears to be making little effort to improve. Limited education reforms on language instruction have been passed, with few discernible results. Improving the country's English skills is not a subject of national debate. If anything, public debate is aroused only when it is proposed that English take on a small measure of official importance.

French employers value English skills as much as employers elsewhere, but the education system is disconnected from those needs. The understanding among French parents is that adequate English skills can be acquired only by those able to afford trips abroad, tutoring, and private schools. Although a small portion of French students achieve a high degree of English proficiency through private initiative, the unusually high level of inequality in the French school system ensures that most students do not.

The European Union has an explicit policy of multilingualism for all its citizens, and in pursuit of that goal it gathers data and organizes exchanges to encourage the sharing of best practices in language learning between member countries. For this reason, the EU developed the Common European Framework of Reference (CEFR), which has become a worldwide standard for benchmarking language proficiency in all languages. Countries both within and outside of Europe would do well to use these resources to improve their own policies.

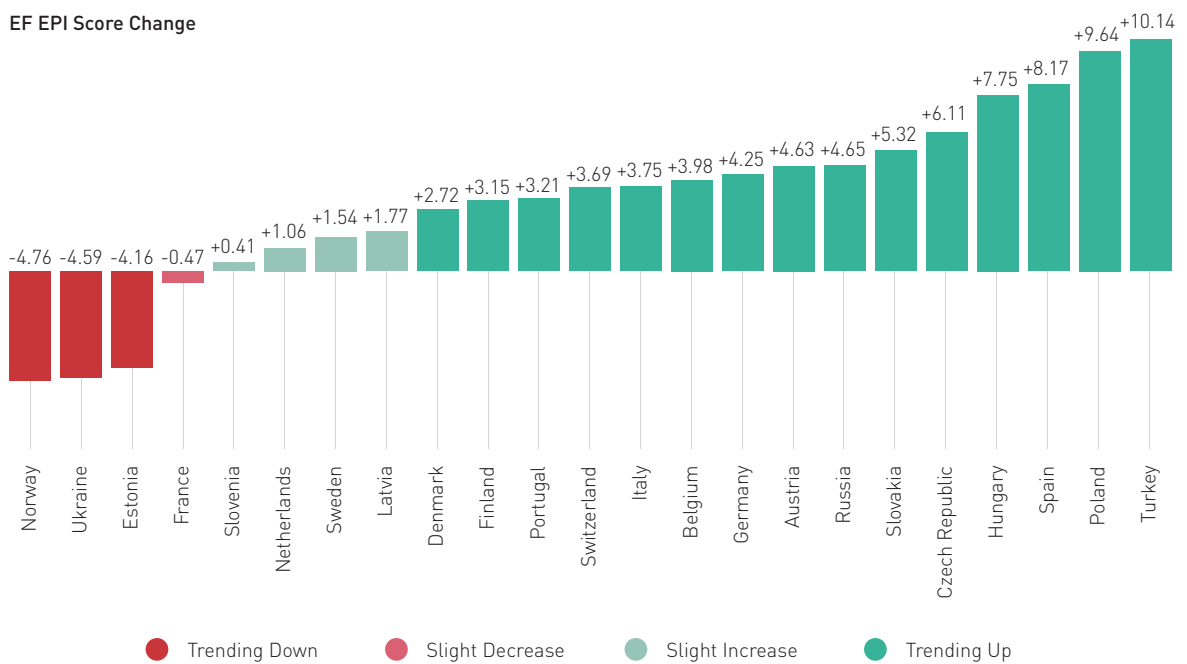
EUROPE



EF EPI TRENDS

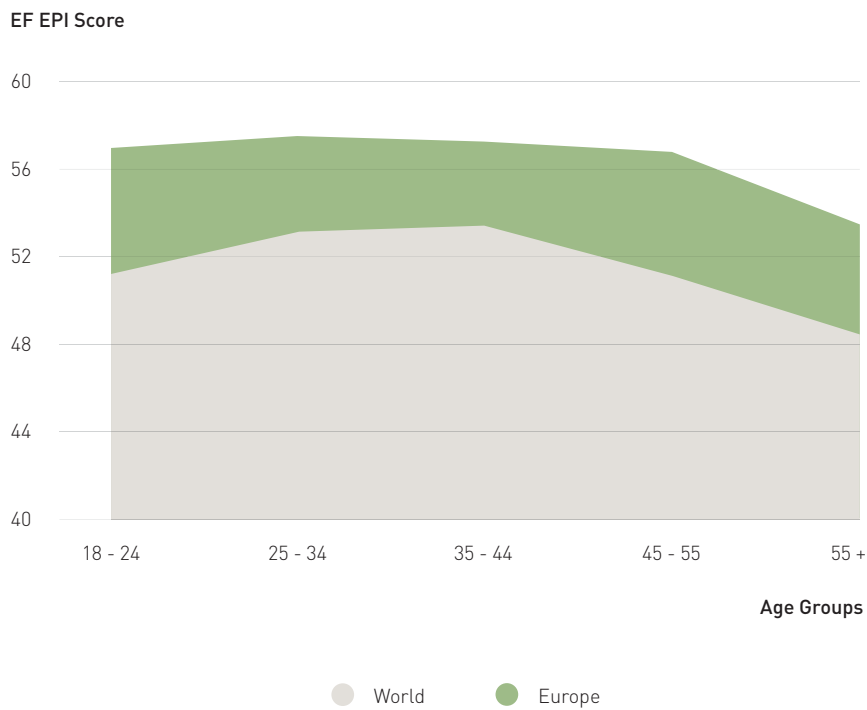
Despite its already strong English skills, Europe continues to improve. Since 2007, Europe's average proficiency level has risen 3.59 points. Only three countries have experienced significant declines in English proficiency levels.

EF EPI Score Change



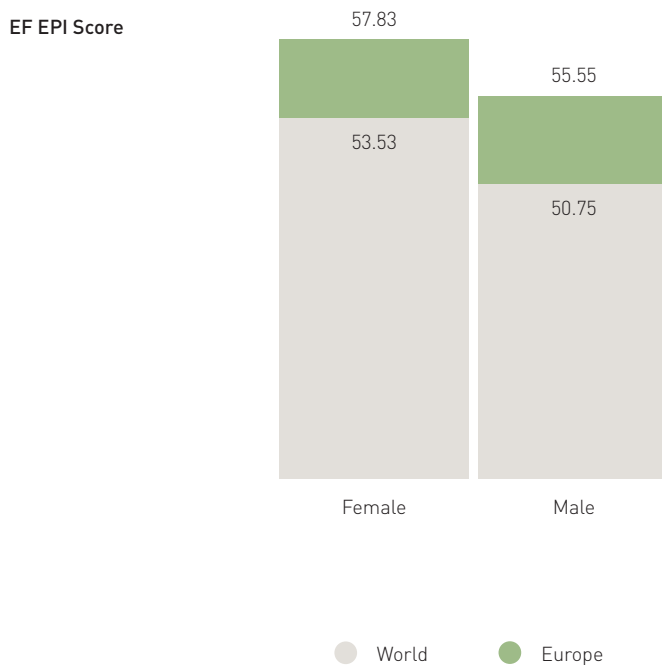
ENGLISH BY AGE

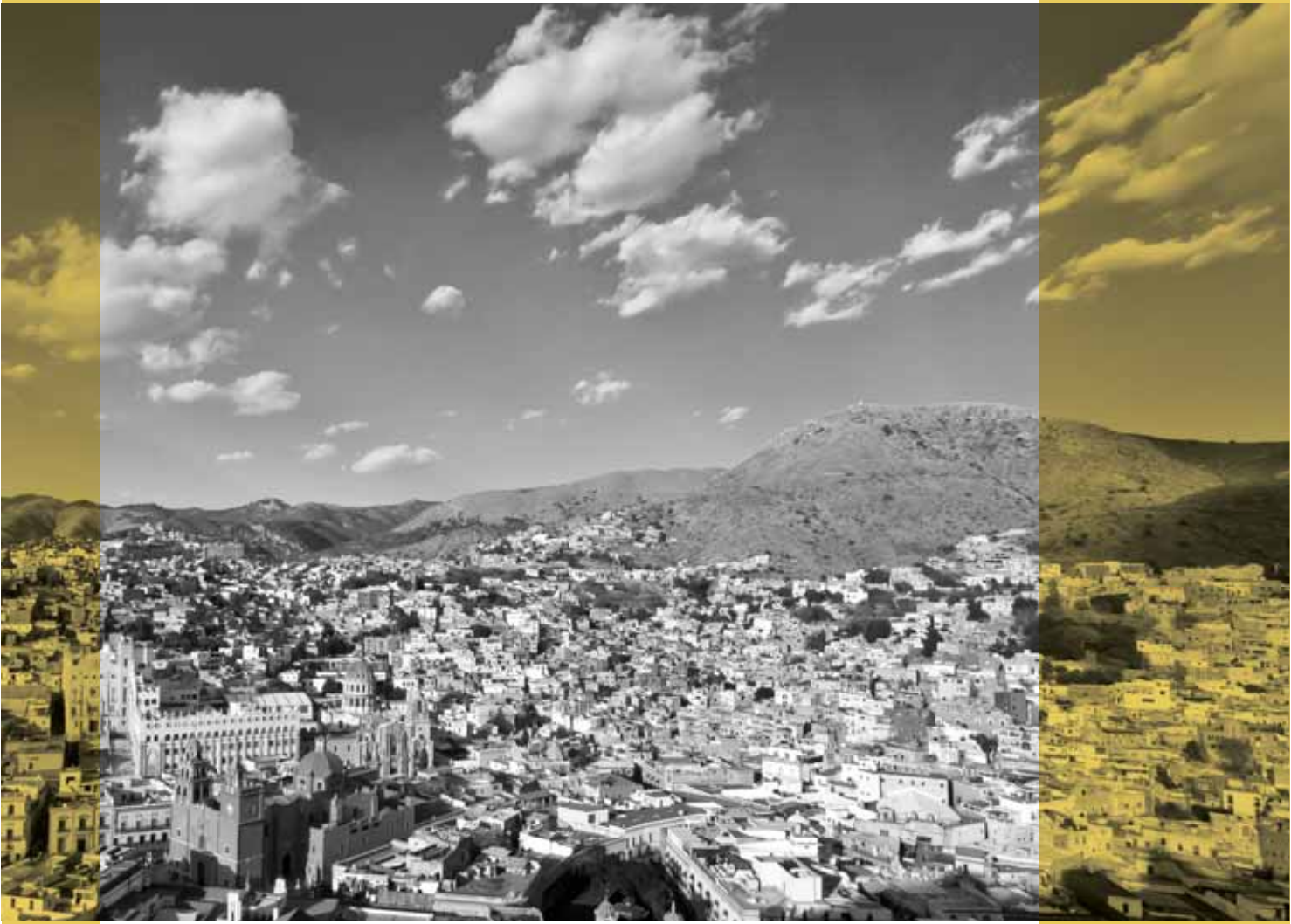
The generation gap in Europe divides those aged 44 and below from those aged 45 and above. Unlike other regions of the world, where young adults (18-24) are behind mid-career professionals (25-44), European young adults have similar English levels to mid-career professionals.



ENGLISH BY GENDER

European men and women are both significantly above the global averages, but European women have higher proficiency levels than European men ($p < 0.001$).





LATIN AMERICA

LATIN AMERICA STRUGGLES TO IMPROVE

Adult English proficiency remains weak in Latin America. Of the 14 Latin American countries included in our index, 12 have low English proficiency levels. However, the region's average EF EPI score has improved, gaining 2.16 points since 2007. The Dominican Republic, Ecuador, and Peru stand out for their above-average gains, while English skills are not improving in El Salvador, Guatemala, Mexico, and Uruguay.

ARGENTINA STAYS AHEAD

Argentina is by far the strongest Latin American country in English proficiency, and it continues to improve. In general, English teachers in Argentina are highly qualified, as they must complete a five-year graduate program to teach in public schools. In its latest National Law of Education, passed in 2006, the Argentine government made it mandatory for public schools to teach English as a foreign language to all students in grades four to twelve.

Daniel Scioli, governor of Buenos Aires, explained that a command of English is necessary for Argentina to participate in and accelerate international trade. In recent years, economic stagnation among the members of the Mercosur bloc, a political and economic agreement of five South American countries, has prompted Argentina to look beyond its neighbors in search of a more diverse trading network. For many Argentines, speaking English well is key to participating in the global market.

DOMINICAN REPUBLIC, CHILE, AND COLOMBIA SHOW PROGRESS

The EF EPI score for the Dominican Republic is the most improved among Latin American countries, moving from the lowest proficiency band in 2007 to moderate proficiency in 2013. Economic incentives have clearly driven much of this progress. The Dominican Republic's top trade partner is the United States, which accounts for 51% of its exports and nearly 40% of its imports. There are now more than 100 English call center companies in the Dominican Republic, and they employ 35,000 workers nationwide. In 2013, the Dominican government awarded 2,065 full scholarships for overseas master's programs, and it is working to establish stronger academic ties with English-speaking countries.

Chile has gained more than four points over the past seven years. This progress is the result of both private and public investments in English training. In 2003, the Chilean Ministry of Education initiated the English Opens Doors Program to improve English teaching on a national scale. Over the past decade, more than 1,800 qualified English-speaking volunteers have been recruited as teaching assistants and assigned to work in public and semi-private schools across the country.

Colombia, another country that has made significant progress in English proficiency, has a similar scheme that invites hundreds of volunteers from various English-speaking countries to train more than 5,000 graduates of the state-run National Training Service. The Colombian government has vowed to establish the best education system in the region by 2025 and envisions a bilingual country where English is as important as Spanish.

MEXICO FAILS TO IMPLEMENT REFORM

Compared to the Dominican Republic, Mexico has even stronger economic ties with the U.S.; it sends more than 70% of its export goods to its northern neighbor. However, Mexico's troubled education system is not training students to capitalize on this economic alliance with the U.S. In 2009, the Mexican government proposed universal English courses in primary schools. Five years later, many schools have yet to apply the federal policy, especially in rural areas where teacher strikes, frequent protests, and violence have hindered implementation. One of Mexico's greatest education challenges is to implement reform in a highly politicized system.

COSTA RICA SUCCESSFULLY

TRAINS TEACHERS

While Mexico is in stasis, Costa Rica shows promise. A 2010 study found that 95% of English teachers in Costa Rica were at an intermediate level or above, reflecting the effort of a multi-phase training program spearheaded by the Education Ministry. Costa Rica has yet to demonstrate significant improvement in adult English skills over the past seven years, but teachers' higher English levels should have an effect on the next generation of adults.

Although Latin American economies grew by an average of 4.3% per year between 2004 and 2011, they now face the prospect of slower growth due to uncertainties in the global market. All major international education surveys around the world, including PISA and the EF EPI, cite the low quality of basic education in Latin America as a barrier to growth. To enhance their competitiveness, Latin American countries must make education reform a priority.

LATIN AMERICA

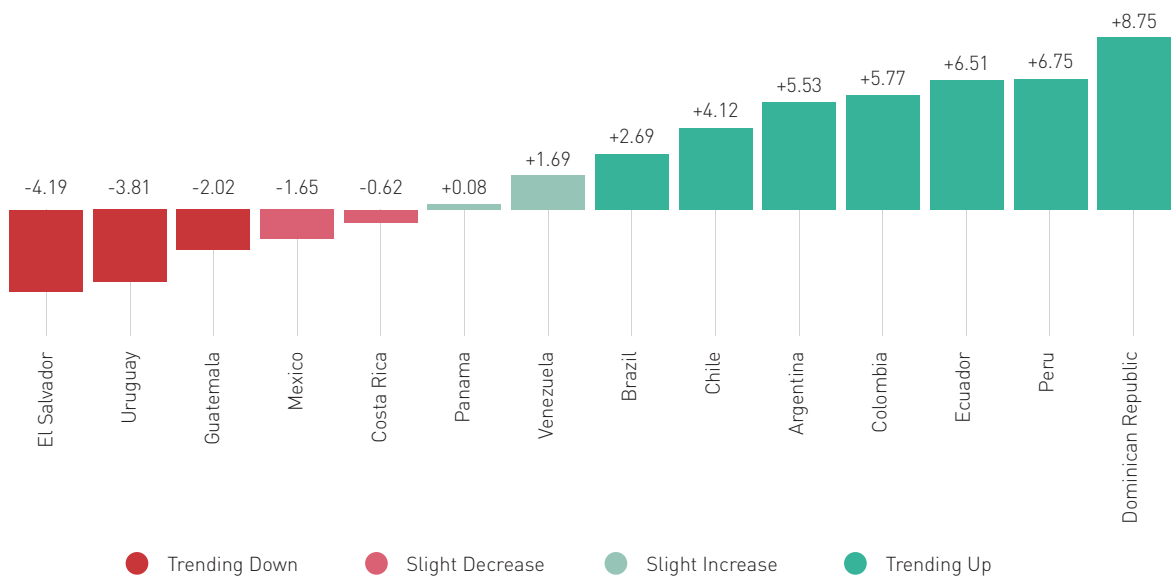


PROFICIENCY BANDS ● Very High ● High ● Moderate ● Low ● Very Low

EF EPI TRENDS

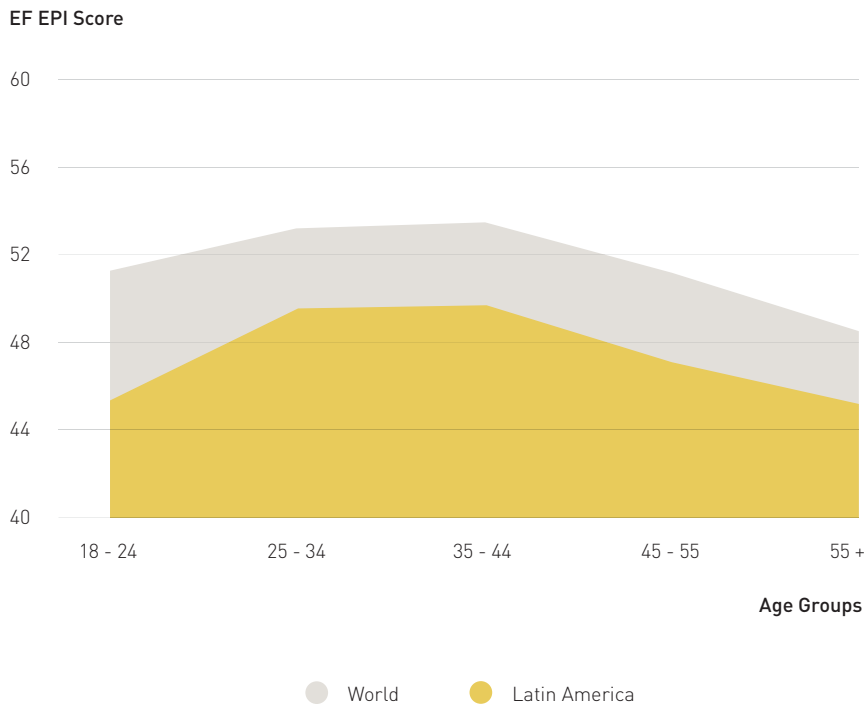
Of the 14 Latin American countries included in our index, 12 have low English proficiency levels. However, the region's average EF EPI score has improved, gaining 2.16 points since 2007. The Dominican Republic, Ecuador, and Peru stand out for their above-average gains.

EF EPI Score Change



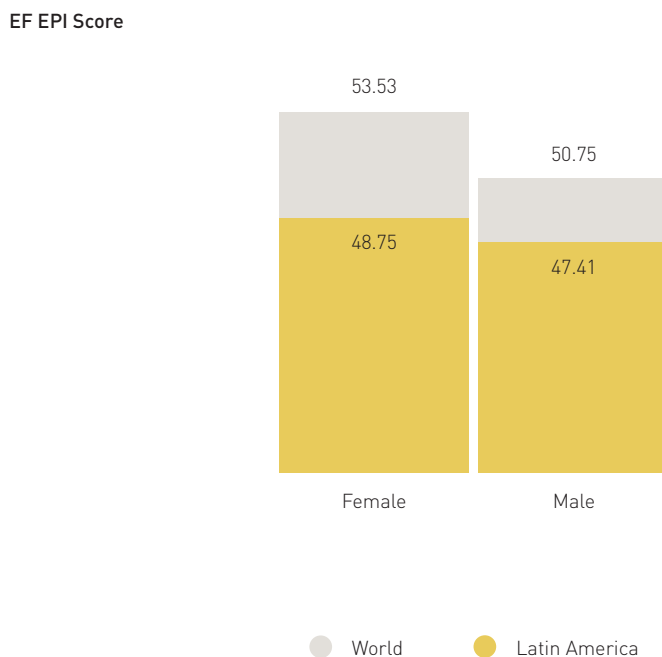
ENGLISH BY AGE

Following the global trend, Latin American mid-career professionals (aged 25-34 and 35-44) have the highest proficiency levels. However, unlike the global trend, young adults in Latin America are significantly behind those in the 45-54 age group and have similar English levels to those 55 and above.

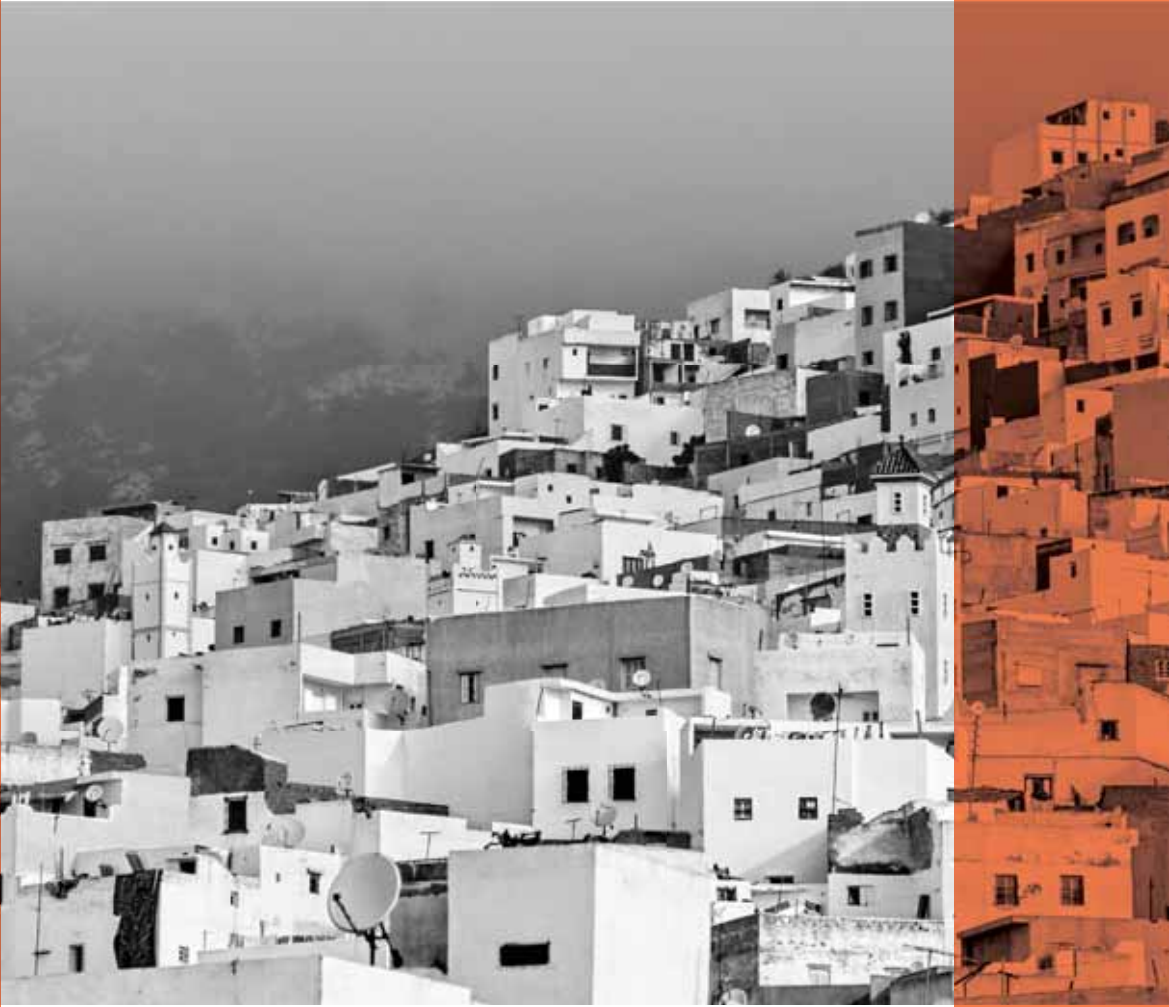


ENGLISH BY GENDER

While Latin American women are stronger than Latin American men in English proficiency ($p < 0.001$), both groups are significantly behind the global averages.



● Very Low Proficiency



MIDDLE EAST & NORTH AFRICA

MENA'S LOW ENGLISH LEVELS WORSEN

The Middle East and North Africa (MENA) is by far the world's weakest region in English proficiency. It includes eight of the ten lowest-performing countries in this year's index. This poor performance comes despite levels of development and education spending equivalent to, or even above, much of Asia.

The decline in English skills in the MENA countries over the past seven years is even more striking considering that these countries started from a low baseline of proficiency. Except for Jordan and the United Arab Emirates (UAE), every MENA country in the EF EPI has measurably declining English skills, including several countries with marked declines (four or more points).

To understand these results, it is helpful to look at the test takers themselves. Internet penetration across the MENA countries remains below 60% except in Kuwait, Qatar, and the UAE, but the MENA region currently has the world's fastest-growing rate of Internet penetration. With increased access to the Internet, our test-taking population has become a more representative sample of Middle Easterners and North Africans. This more representative sample has, on average, a lower English proficiency level than previous samples in the region.

Across the MENA countries, there has been a great deal of progress in the past decades in providing free education for all children, enrolling children in school, and ensuring that both girls and boys participate equally. However, many of the region's persistent educational challenges impact English learning as well.

MENA'S LABOR MARKET NEEDS RESTRUCTURING

One of the major difficulties for effective education reform in MENA is the structure of the labor market, which in many countries includes a public sector employing as much as 50% of the workforce, a far higher percentage than most economies outside the region. A huge public sector with guaranteed lifetime employment and higher wages than the private sector distorts incentives both for students and employees.

Despite its size, this public sector is poorly structured to absorb all the qualified graduates the university system produces, resulting in unusually high unemployment rates among qualified young people and significant migration away from the region. Migration flows to Europe are erratic, leaving many of these migrants underemployed. All of these inefficiencies in the labor market make education reform a challenge because the benefits of reforms will not necessarily be apparent in either economic growth or increased employment levels.

BABY BOOM STRESSES EDUCATION SYSTEMS IN MENA

These systemic challenges are compounded by the fact that MENA is experiencing a baby boom. About 21% of the MENA population is aged 15-25, and another 45% is under 15. Although birth rates have declined in the past few years, this large cohort of young people moving through schools has stressed the education system in MENA countries.

Unfortunately, in MENA as a whole, our data shows no generational difference in English skills between recent graduates and mid-career adults. If schools were able to provide an effective English-language training program today, the baby boom would ensure that average adult proficiency levels would rise quickly as this large cohort advances to adulthood. However, there is little evidence that this improvement is occurring.

UAE IS AN EXCEPTION IN MENA

The United Arab Emirates has weak English proficiency compared to countries in other regions, but it stands out in MENA for its relative success in English language education. This success stems from two waves of education reform. In the first wave, the UAE improved training for teachers and administrators as it modernized its

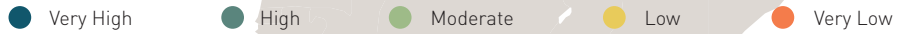
curriculum. The second wave, which began in 2010, is too recent to have had an impact on adult proficiency, but it is already showing results on national tests of children. This second set of reforms has increased the use of English as the language of instruction in some subjects, introduced technology into every classroom, and mandated English lessons in all primary schools.

English is mandatory in the UAE for entry to federal universities in all degree courses, as many courses are taught in English. However, due to insufficient training in primary and secondary schools, 30% of federal universities' budgets go to remedial classes, including English classes. It is not uncommon for students to attend these remedial courses for one or two years after graduating from high school before being allowed to start university courses. Clearly, it is inefficient and expensive to force the university system to make up for the shortfalls of the K-12 education system.

For the MENA region as a whole, reforming education systems, while important, will not be sufficient to align economic incentives with educational objectives. In particular, it will be necessary to increase the availability of technology, and to restructure the economy in order to expand large-scale private enterprise.

MENA

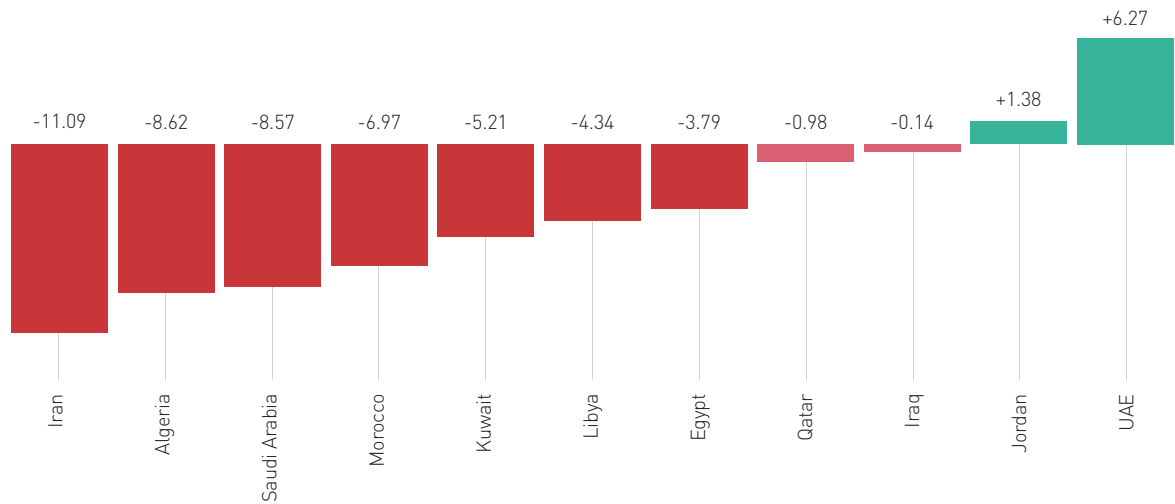
PROFICIENCY BANDS



EF EPI TRENDS

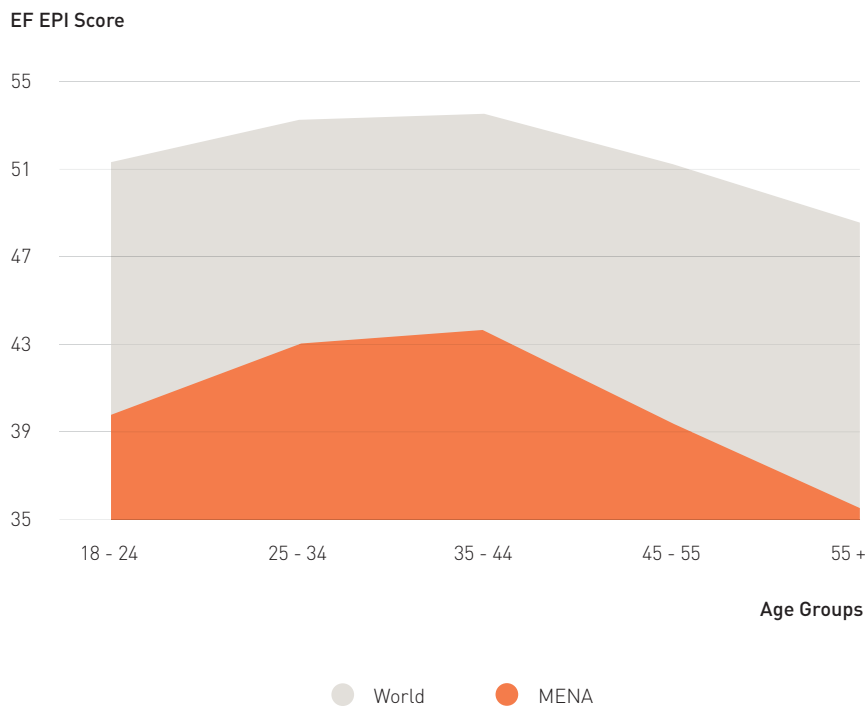
The decline in English skills in the MENA countries over the past seven years is even more striking considering that these countries started from a low baseline of proficiency. Since 2007, MENA's average proficiency level has dropped 2.66 points.

EF EPI Score Change



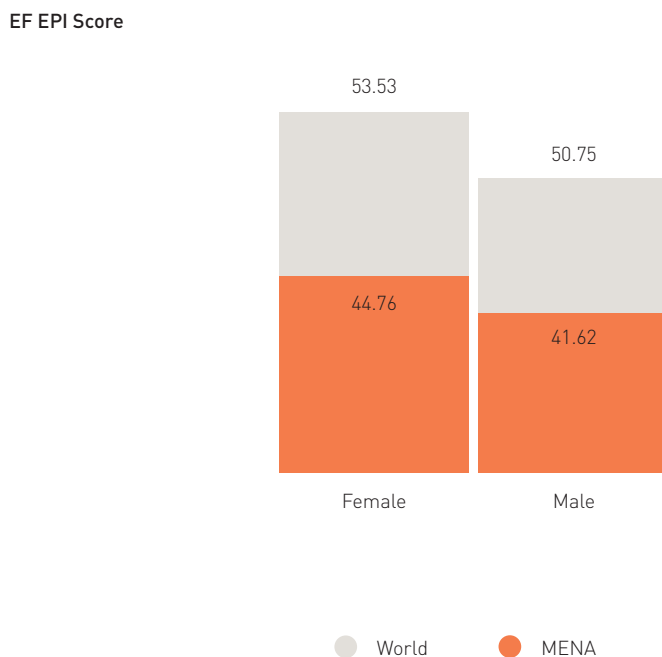
ENGLISH BY AGE

MENA follows the global generational trend: mid-career professionals (aged 24-34 and 35-44) have the highest English proficiency levels. Young adults (18-24) are similar to those aged 45-54. Those 55 and above have the poorest English skills.



ENGLISH BY GENDER

MENA women are significantly stronger than MENA men ($p < 0.001$), but both groups are nearly ten points behind the global averages.



ENGLISH AND ECONOMIC COMPETITIVENESS

Since the first edition of the EF EPI, we have consistently seen strong correlations between countries' English proficiency levels and a number of social and economic indicators, including gross national income per capita.

Historically, speaking a second language—or, more specifically, speaking a second language valued for international trade and diplomacy—was a marker of the social and economic elite. The influence of the English language has grown, first under the British Empire, and then during the post-war economic expansion of the United States. In many countries today, English has replaced the role that French previously played as an indicator 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 is less associated with the elite, and it is not as closely tied to the United States or the United Kingdom as it once was. Instead, English is becoming a basic skill for the entire global 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.

STRONG ENGLISH CORRELATES WITH HIGHER INCOME

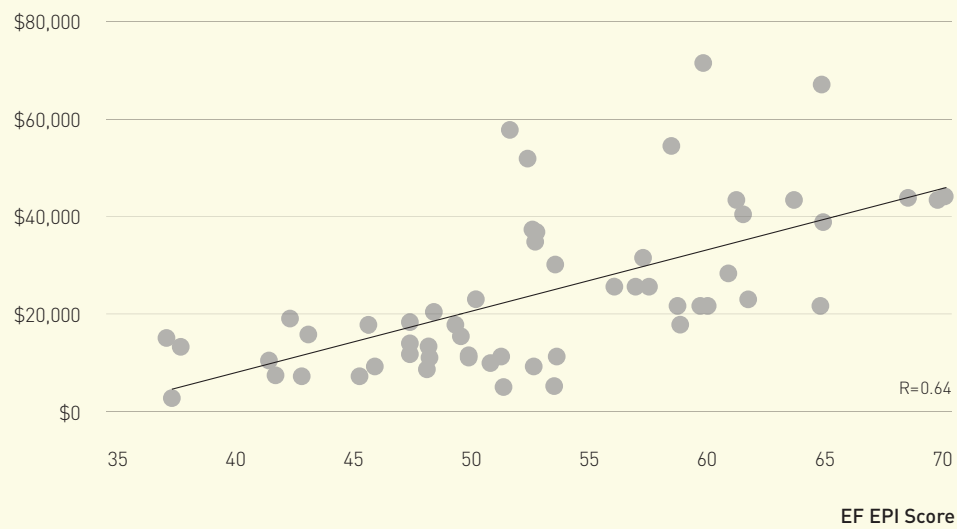
English is increasingly a core element in determining employability. For example, in India, employees who speak fluent English earn on average a 34% higher hourly wage than those who do not speak English; even those who can speak a little English earn 13% more than those who cannot.

The interaction between English proficiency and gross national income per capita suggests a virtuous cycle, in which improving English skills drive up salaries, which in turn give governments and individuals more money to invest in English training. Based on anecdotal evidence, the relationship also applies on a smaller scale, where improved English skills allow individuals to apply for better jobs and raise their standards of living.



ENGLISH AND INCOME

Gross National Income per Capita (USD)



Source: World Bank, GNI per capita PPP(\$), 2012

ENGLISH AND BUSINESS

High English proficiency also correlates with the ease of doing business. Around the world, companies are conducting more and more of their business in English. Those that are not may be lagging behind their competitors.

DOING BUSINESS IN ENGLISH

The World Bank and the International Finance Corporation's Ease of Doing Business Index ranks the regulatory environments of economies around the world by how conducive they are to starting and operating a business. The index has ten sub-indices, including the ease of starting a business, trading across borders, enforcing contracts, and resolving insolvency.

In countries where English is not an official language, doing business is easier when English skills are better. Around the world, companies today are conducting more and more of their business in English. An increasing number of companies (e.g., Nokia, Rakuten, Renault, and Samsung) are adopting English as their corporate language. Those that are not may be lagging behind their competitors.

There are several reasons why English language proficiency leads to increased corporate competitiveness:

SUCCESSFUL EXPANSION OVERSEAS

Globalization is spurring an increasing number of companies to look outside their borders and become more international in the way they do business. A JPMorgan

Chase survey found that 61% of middle-market firms were actively doing business in international markets in 2013, up from 58% in 2012 and 43% in 2011. It is becoming common for workers and businesses to communicate with customers, colleagues, suppliers, and partners outside their home markets. The companies that thrive in these conditions are the ones whose employees have the skills and training to communicate efficiently across borders.

MINIMIZED LOSSES FROM COMMUNICATION GAPS

In an Economic Intelligence Unit (EIU) survey of 572 executives at multinational companies, nearly half admitted that basic misunderstandings had stood in the way of major international business deals, resulting in significant losses for their companies. That percentage was considerably higher for executives at Brazilian and Chinese companies, where 74% and 61%, respectively, acknowledged experiencing such losses.

The conclusion is clear: language and cultural differences create barriers to business success. In the EIU study, 64% of business leaders said that these differences also make it difficult to gain a

foothold in foreign markets, and that these cultural differences have hampered their international expansion plans. In addition, 70% stated that they sometimes encounter difficulties when communicating with business stakeholders.

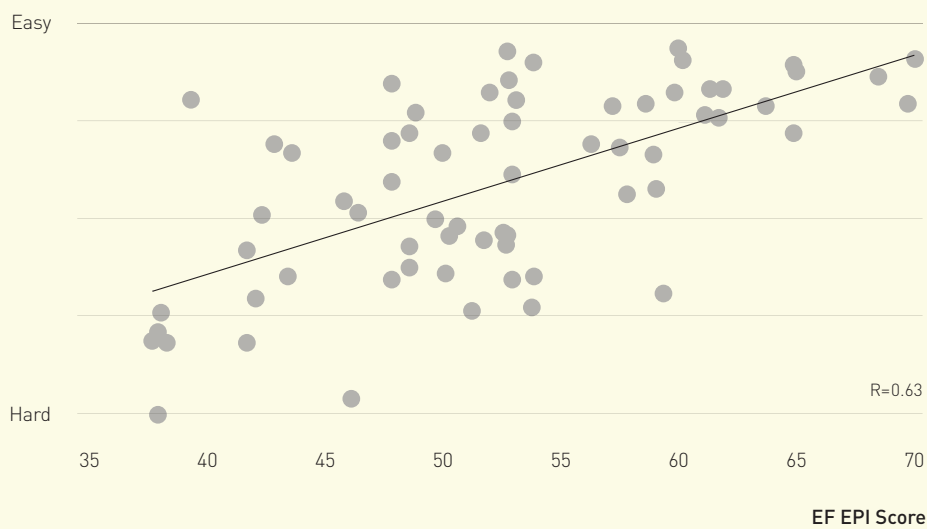
A HEALTHIER BOTTOM LINE

Nearly 90% of the 572 executives surveyed by the EIU said that if cross-border communication improved at their company, then profit, revenue, and market share would increase significantly, with better expansion opportunities and fewer lost sales opportunities. A separate study, conducted by Illuminas in 2014, found that 79% of decision-makers at global businesses that had invested in English training for their staff saw increased sales. Other business benefits included improved employee communication, employee productivity, and customer satisfaction.



ENGLISH AND THE EASE OF DOING BUSINESS

Ease of Doing Business Score



Source: World Bank and IFC Ease of Doing Business Index, 2013

ENGLISH AND QUALITY OF LIFE

Indices of quality of life, such as the Human Development Index and the Legatum Prosperity Index, correlate positively with the EF EPI.

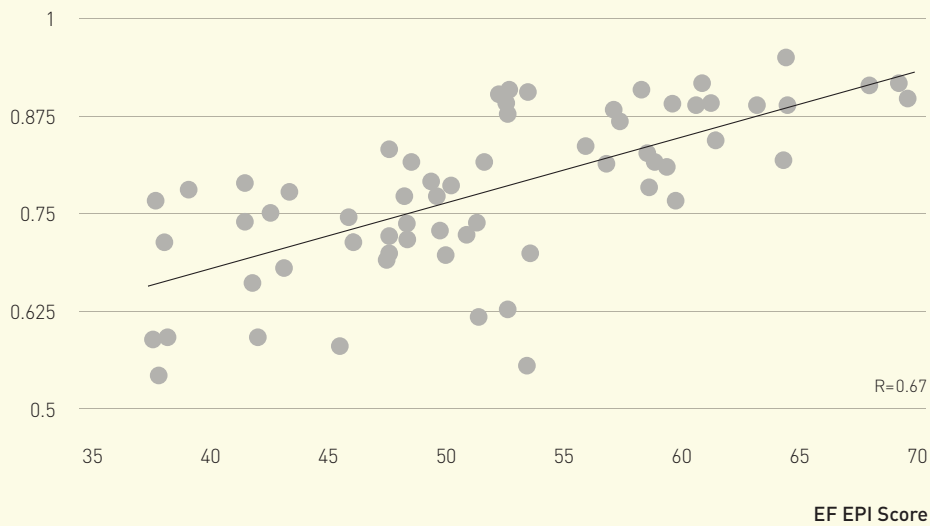
In many developing countries, English is treated as a luxury, taught well only at private schools and universities. Because English proficiency plays a central role in determining employability and professional success, English is today a core skill. Considering the growth in the importance of English over the past 15 years, a strong working knowledge of the language for today's children will be even more essential when they enter the workforce.

Indices of quality of life, such as the Human Development Index and the Legatum Prosperity Index, correlate positively with the EF EPI. The Human Development Index considers education attainment, life expectancy, and income, whereas the Legatum Prosperity Index includes economic growth, entrepreneurship and opportunity, governance, education, health, safety and security, personal freedom, and social capital.

There are a few low and moderate proficiency countries that display high levels of development. However, all high and very high proficiency countries do very well on the Human Development Index and the Legatum Prosperity Index.

ENGLISH AND DEVELOPMENT

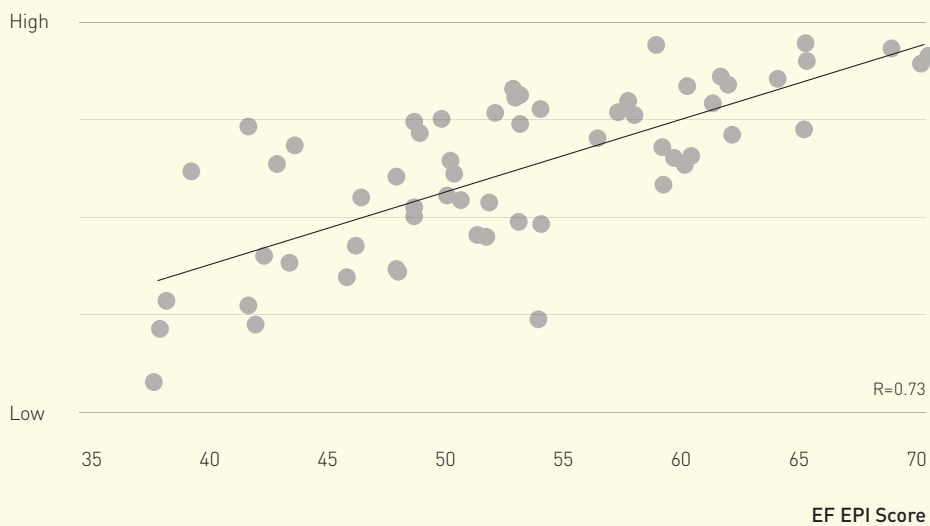
Human Development Index (HDI)



Source: United Nations Human Development Report, 2012

ENGLISH AND PROSPERITY

Legatum Prosperity Index



Source: Legatum Institute, 2013

ENGLISH AND PUBLIC EDUCATION

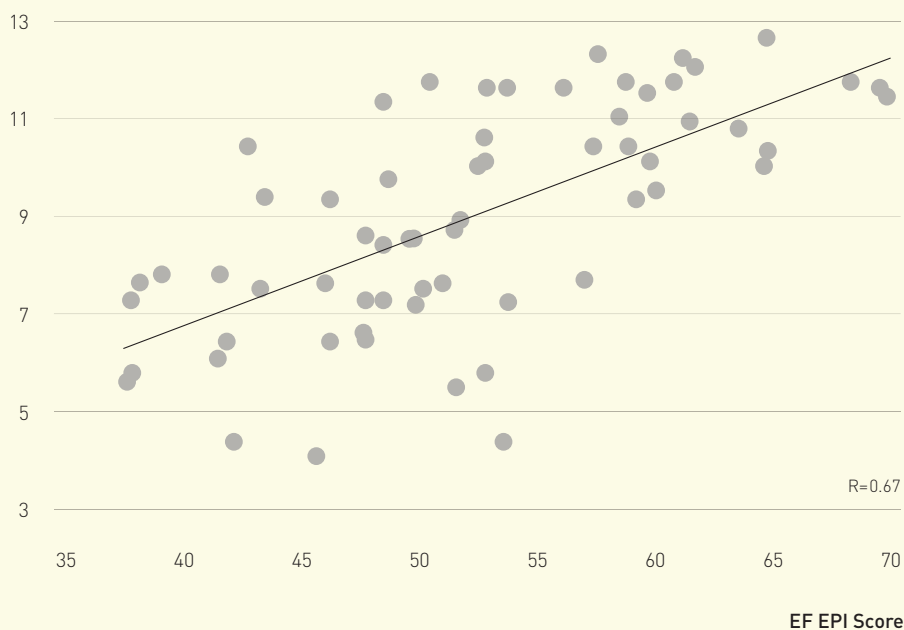
Despite the diversity of education systems across the world, there remains a strong correlation between average years of schooling and English proficiency.

A country's education system is the primary provider of English training. Historically, most students have received their formal education through the public school and university system, and they have relied on that system to set appropriate competency goals, align curricula and teaching methods, and evaluate success before delivering diplomas. Despite

the diversity of education systems across political, economic, and cultural contexts, there remains a strong correlation between average years of schooling and English proficiency. Countries looking for improved English proficiency, and the benefits it brings, must keep all children in school long enough for them to master the language.

ENGLISH AND SCHOOLING

Average Years of Schooling



Source: United Nations Development Program, 2012

ENGLISH AND TECHNOLOGY

Technological advances are helping students learn English more effectively. In countries where English proficiency is high, Internet penetration is also high.

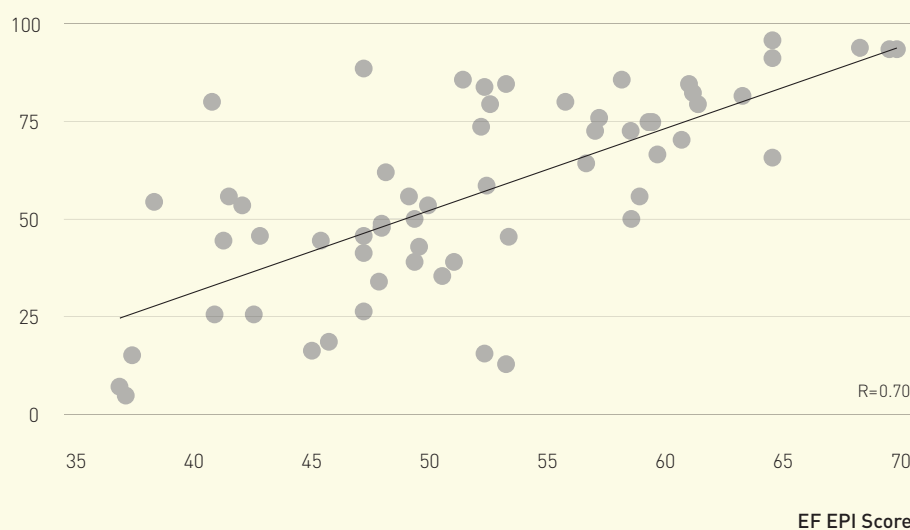
Using online tools is a self-reinforcing activity: better English skills allow people more access to online tools and resources, and accessing these resources improves people's English. In countries with lower English proficiency, online tools offer the opportunity to make English learning more individualized, more interactive, and more accessible.

Learning to speak a language requires regular practice. The Internet provides a boundary-less platform for English learners to interact with one another. A 2012 report by Euromonitor International shows that, in the Middle East and North Africa, one of the most compelling incentives for young people to learn English is their eagerness to participate

in online social networking. Self-paced learning, MOOCs, and classroom twinning are all enabled by, and dependent upon, access to the Internet both at home and in schools. Research on technology availability and usage in language classrooms shows there is still a great deal of progress to be made in this area.

ENGLISH AND INTERNET PENETRATION

Internet Users per 100 People



Source: World Bank, 2012

CONCLUSIONS

Although English is more accepted every year as the global lingua franca, it takes time for education systems and societies to adapt. Workplace demand for English is high, and many countries are scrambling to meet that need. Our research shows that most countries are successfully raising adult proficiency levels, but some are investing in ineffective programs, and many lack a comprehensive national plan.

Private initiatives by parents, professionals, and companies are responsible for a large portion of the progress in English proficiency worldwide. That so many individuals and companies are funding their own English training is a clear indication of the shortfall in school systems and public programs.

Common elements shared by successful reforms include:

- **Aligning the education system** such that students leaving primary school are ready for secondary school, and students leaving secondary school can enter university directly without recourse to remedial classes. This alignment requires coordination across regions and government divisions.
- **Defining English proficiency as a core competency** for all graduates. Officially recognizing the importance of English helps align different government entities and generate momentum for reform.
- **Implementing comprehensive training programs** for all English teachers, with an emphasis on communication skills and mentoring.
- **Using English as a medium of instruction** at a variety of levels in the public school system. Studies of these schemes show that there is a real trade-off between learning English and learning the subject being taught. As English proficiency improves, that gap closes.
- **Developing assessment standards that evaluate effective communication**, providing incentives for students and teachers to focus on the most useful foreign language skills.
- **Supporting adults** in learning English efficiently. Adults often lack time and guidance, but they do not lack motivation. They need help defining their goals and measuring progress toward them so that they will not become discouraged.
- **Lowering barriers to study abroad** by negotiating visa agreements with host countries, offering free English tests, organizing scholarships, standardizing credit transfers, and setting up official research partnerships.
- **Recognizing companies as major investors** in English teaching. Business is not only driving the demand for English speakers, but also helping to satisfy it. Thousands of companies invest in English training for

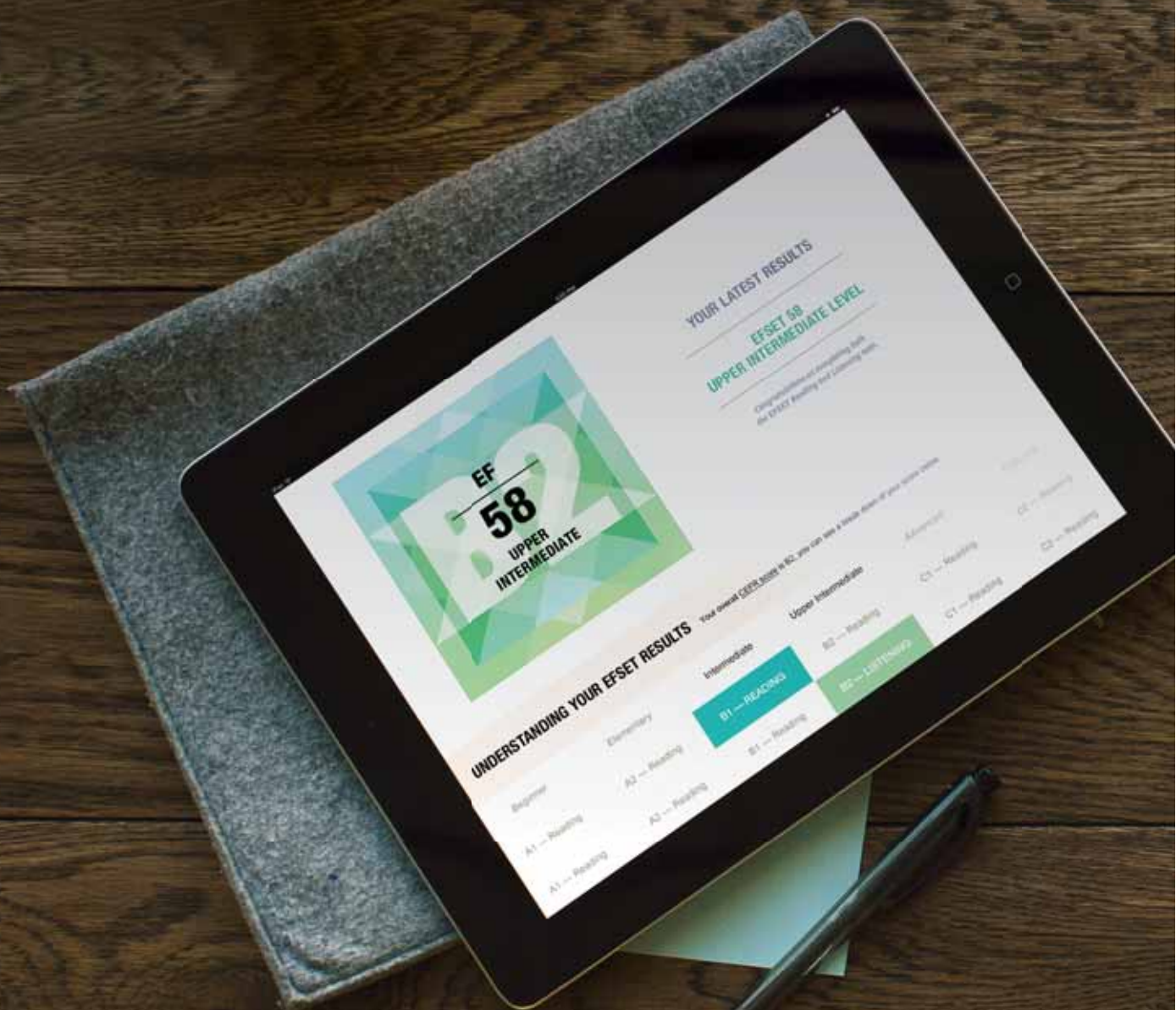
their employees, often with poor or unknown results. Companies can be encouraged to share best practices, evaluate their English training programs' performance, and define their hiring requirements so that educational institutions can make adjustments.

- **Using global events** such as the Olympics and the World Cup to launch city- or nationwide English improvement campaigns. When national attention is focused and people are energized, they are more likely to learn.

By evaluating what other countries have tried, individuals, governments, and companies can avoid the most common pitfalls and identify the most effective strategies for improving English proficiency. There is no one-size-fits-all solution; however, international best practices are steadily emerging. Through this report, we hope to have highlighted some of those best practices.



LOOKING AHEAD: THE EF EPI AND INNOVATION IN LANGUAGE ASSESSMENT



GLOBAL: www.efset.org
CHINA: www.efset.cn

As interest in the EF EPI has grown since its launch in 2011, we have seen a rise in demand among individuals, chief learning officers, and policy makers to effectively test English skills in a low-cost, convenient, and reliable manner. The existing standardized English tests such as Cambridge English FCE, IELTS, TOEFL, and TOEIC are high-quality but expensive.

Moreover, while there are millions of Cambridge English FCE, TOEFL, TOEIC, and IELTS test takers every year, they make up only a small fraction of the nearly two billion English learners. These individual English learners, as well as institutions such as companies and governments, do not have access to an affordable, high-quality standardized English test.

As a result, we developed the EF Standard English Test (EFSET). Offered at no cost, and built to the same standards as other standardized tests, the EFSET rests on a foundation of evidence-based research and analysis. Test items were created by experienced exam writers, carefully reviewed by a panel of experts, and piloted on a diverse group of learners in various language-learning settings. The resulting test data was then analyzed by psychometricians and test developers before being calibrated for inclusion in the operational EFSET.

In order to make high-quality English testing accessible to all learners, the EFSET is available online for free (www.efset.org). EFSET results will be used in future versions of the EF EPI and will improve the EF EPI as an international benchmark of adult English proficiency.



EF STANDARD ENGLISH TEST

ABOUT THE INDEX

METHODOLOGY

The EF English Proficiency Index calculates a country's average adult English skill level using data from two different EF English tests completed by hundreds of thousands of adults every year. One test is open to any Internet user for free. The second is an online placement test used by EF during the enrollment process for English courses. Both include grammar, vocabulary, reading, and listening sections.

The open online test is a 30-question adaptive exam, so each test taker's questions are adjusted in difficulty according to his or her previous correct and incorrect answers. The non-adaptive placement test is 70 questions in length. All scores have been validated against EF's course levels. The test administration is identical for both tests, with test takers completing the exam on computers.

There is no incentive for test takers to inflate their scores artificially 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 fourth edition was calculated using 2013 test data from about 750,000 test takers. Only countries with a minimum of 400 test takers were included in the index. Countries with fewer than 100 test takers on either of the two tests were also excluded, regardless of the total number of test takers. A total of 63 countries and territories were included.

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 could skew scores lower or higher than those of the general population.

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, we expect the impact of this exclusion to be the strongest. This sampling bias would tend to pull scores upward by 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 two tests, giving 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 the next page for more details about what English speakers in each band can do.

EF EDUCATION FIRST

EF Education First (www.ef.com) is an international education company that focuses on language, academics, and cultural experience. Founded in 1965, EF's mission is "opening the world through education." With 500 schools and offices in over 50 countries, EF is the Official Language Training Supplier of the Rio 2016 Summer Olympics. The EF English Proficiency Index is published by EF Learning Labs, the research and innovation division of EF Education First.

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 most relevant areas (e.g., very basic personal and family information, shopping, local geography, employment). Can communicate during routine tasks requiring a simple and direct exchange of information on familiar 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 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 and C2.

EF EPI COUNTRY SCORES

A look at changes in English skills over the past seven years:

The EF EPI score change is the difference between a country's EF EPI first edition and fourth edition scores. Any change greater than two points—positive or negative—indicates a significant shift in English ability. The EF EPI first edition used test data from 2007 to 2009, the second from 2009 to 2011, the third from 2012, and the fourth from 2013.

COUNTRY	EF EPI FIRST EDITION	EF EPI FOURTH EDITION	SCORE CHANGE
ALGERIA	47.13*	38.51	-8.62
ARGENTINA	53.49	59.02	+5.53
AUSTRIA	58.58	63.21	+4.63
BELGIUM	57.23	61.21	+3.98
BRAZIL	47.27	49.96	+2.69
CAMBODIA	—	38.25	new
CHILE	44.63	48.75	+4.12
CHINA	47.62	50.15	+2.53
COLOMBIA	42.77	48.54	+5.77
COSTA RICA	49.15	48.53	-0.62
CZECH REPUBLIC	51.31	57.42	+6.11
DENMARK	66.58	69.30	+2.72
DOMINICAN REPUBLIC	44.91	53.66	+8.75
ECUADOR	44.54	51.05	+6.51
EGYPT	45.92*	42.13	-3.79
EL SALVADOR	47.65	43.46	-4.19
ESTONIA	65.55 [#]	61.39	-4.16
FINLAND	61.25	64.40	+3.15
FRANCE	53.16	52.69	-0.47
GERMANY	56.64	60.89	+4.25
GUATEMALA	47.80	45.77	-2.03
HONG KONG	54.44	52.50	-1.94
HUNGARY	50.80	58.55	+7.75
INDIA	47.35	53.54	+6.19
INDONESIA	44.78	52.74	+7.96
IRAN	52.92*	41.83	-11.09
IRAQ	38.16 [#]	38.02	-0.14
ITALY	49.05	52.80	+3.75
JAPAN	54.17	52.88	-1.29
JORDAN	46.44 [#]	47.82	+1.38
KAZAKHSTAN	31.74	42.97	+11.23
KUWAIT	47.01*	41.80	-5.21

COUNTRY	EF EPI FIRST EDITION	EF EPI FOURTH EDITION	SCORE CHANGE
LATVIA	57.66 [#]	59.43	+1.77
LIBYA	42.53 [*]	38.19	-4.34
MALAYSIA	55.54	59.73	+4.19
MEXICO	51.48	49.83	-1.65
MOROCCO	49.40 [*]	42.43	-6.97
NETHERLANDS	67.93	68.99	+1.06
NORWAY	69.09	64.33	-4.76
PANAMA	43.62	43.70	+0.08
PERU	44.71	51.46	+6.75
POLAND	54.62	64.26	+9.64
PORTUGAL	53.62	56.83	+3.21
QATAR	48.79 [*]	47.81	-0.98
ROMANIA	—	58.63	new
RUSSIA	45.79	50.44	+4.65
SAUDI ARABIA	48.05	39.48	-8.57
SINGAPORE	58.65 [*]	59.58	+0.93
SLOVAKIA	50.64	55.96	+5.32
SLOVENIA	60.19 [#]	60.60	+0.41
SOUTH KOREA	54.19	53.62	-0.57
SPAIN	49.01	57.18	+8.17
SRI LANKA	51.47 [#]	46.37	-5.10
SWEDEN	66.26	67.80	+1.54
SWITZERLAND	54.60	58.29	+3.69
TAIWAN	48.93	52.56	+3.63
THAILAND	39.41	47.79	+8.38
TURKEY	37.66	47.80	+10.14
UKRAINE	53.09 [#]	48.50	-4.59
UNITED ARAB EMIRATES	45.53 [*]	51.80	+6.27
URUGUAY	53.42 [*]	49.61	-3.81
VENEZUELA	44.43	46.12	+1.69
VIETNAM	44.32	51.57	+7.25

^{*}This score comes from the EF EPI second edition because this country did not appear in the EF EPI first edition.

[#]This score comes from the EF EPI third edition because this country did not appear in the previous EF EPI editions.

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