



EF EPI

EF English Proficiency Index

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English Test
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2018

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WHAT'S NEW THIS YEAR?

1. 1.3 million test takers, a 30% increase over last year
2. 13 new entrants: Afghanistan, Albania, Belarus, Bolivia, Croatia, Ethiopia, Georgia, Honduras, Lebanon, Myanmar, Nicaragua, Senegal, and Uzbekistan
3. A closer look at English proficiency in the workplace, with scores by industry, seniority, and job function
4. New correlations showing that societies that speak English are more open and egalitarian
5. English proficiency scores for over 400 regions and cities

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EXECUTIVE SUMMARY

In 2018, the English language is as important as it has ever been. It is the de facto language of communication for all types of international exchange—goods, services, and ideas.

For companies, English is a key component of remaining competitive and fostering innovation in an internationalized marketplace. As English becomes necessary for ever more interactions in the globalized world, the value of proficiency in the language grows apparent, and the cost of not speaking English grows steeper.

As a consequence of its popularity, English is more detached than ever from any particular culture. Less than a quarter of the world's English speakers are "natives," and that proportion will continue to decline as more people learn English as an additional language. Already, experts estimate that the majority of the world's population speaks two or more languages.

This report aims to broaden the understanding of how and where English proficiency is developing around the world. In order to create the eighth edition of the EF English Proficiency Index, we've analyzed the results of 1.3 million test takers who took our English tests in 2017.

Our key findings are:

ENGLISH PROFICIENCY IMPROVED OVERALL

Eight countries demonstrated significant improvement (by more than two points), and 12 countries—a record number—reached the highest proficiency band. Global trends suggest that this improvement will continue. Public and private investment in English language instruction has not slowed. English is as present as ever in the workplace. International travel increased by 7% in 2017.

SOCIETIES THAT SPEAK ENGLISH ARE MORE OPEN, LESS HIERARCHICAL, AND FAIRER TO WOMEN

Although English cannot be said to cause these societal improvements, it does seem to accompany them. The correlation makes sense. English breaks down barriers, fosters international exchange, and exposes individuals to the wider world.

ENGLISH AND INNOVATION GO HAND IN HAND

More scientific journals are published in English than in any other language, and we've found consistent correlations between English and investment in R&D. This relationship is particularly interesting in light of recent research showing that companies with managers from many countries earn more of their revenue from innovation than less diverse competitors. English is changing the way that ideas flow from one place to another.

WOMEN SPEAK ENGLISH BETTER THAN MEN

This finding has been true for all eight EF EPI indices, and the gender gap, which narrowed in 2016, has widened again. Research into how boys and girls learn foreign languages has shown that female students are more motivated, use a wider variety of strategies to retain new information, and are more willing to make mistakes. Women on the whole are also more likely than men to finish secondary school and attend university. Unfortunately, businesses are not benefitting as much as they could from women's English skills. Studies have shown that women speak less in meetings and negotiations than men and are interrupted more when they do speak.

ON AVERAGE, ADULTS IN THEIR TWENTIES SPEAK THE BEST ENGLISH

For the first time, adults aged 26 to 30 outperform those aged 21 to 25 worldwide, but the relative skills of different age cohorts vary widely among regions. Where economic incentives to learn English are strong, professionals invest time and money in improving their English and become more proficient than students. When English has been introduced or prioritized in a school system fairly recently, the youngest cohort outstrips all others. In places with little discernible difference between age groups, there have often been no major changes in the English learning landscape for decades, and everyone speaks English equally well. Or equally poorly.

MANAGERS HAVE A BETTER GRASP OF ENGLISH THAN EXECUTIVES OR STAFF

This finding holds true across a large majority of industries and countries. Managers interact with their colleagues and clients overseas more regularly than junior staff, so they get more practice speaking English. English skills are also at a premium, and those who have them are often promoted to managerial positions. Executives, on the other hand, tend to be older, and to have come up in a business climate where English skills were less valued. Building English proficiency across all seniority levels would allow companies to develop more international teams and share information more quickly across their organizations.

ENGLISH PROFICIENCY VARIES WIDELY BETWEEN INDUSTRIES AND JOB FUNCTIONS

Although many recruiters now demand English skills in almost all candidates, it is clear that the best English speakers cluster in particular roles, such as legal and strategy, and in particular industries, such as banking and IT. The gap between the industries with the highest proficiency and those with the lowest in any given country can be over 15 points, or three proficiency bands, although the worldwide gap between industries is narrowing. The pressures of globalization mean that almost every industry is subject to international competition. Weaker English skills make competing more difficult.

AFRICA SHOWED THE STRONGEST GAINS IN ENGLISH PROFICIENCY

South Africa’s English improved more than any other country or region in the world, and Algeria, Egypt, and Nigeria also experienced significant gains. This is promising news for a continent with a young population and enormous potential for growth. English skills will enable further engagement with the international community.

ENGLISH SKILLS ARE STRONGER IN EUROPE THAN IN ANY OTHER REGION, ALTHOUGH NOT UNIFORMLY SO

Three of the continent’s largest economies—Spain, Italy, and France—have persistent English skill deficiencies, while countries in northern Europe occupy six of the top 10 positions in the index. Sweden returns to first position after a two-year absence, bumping the Netherlands to second place. The countries on the fringes of Europe lag significantly behind the European average.

IN ASIA, ENGLISH PROFICIENCY DID NOT IMPROVE DESPITE HIGH LEVELS OF INVESTMENT IN ENGLISH

Previous editions of the EF EPI have found a large gap between the highest and lowest proficiency countries in the region, and in 2017, that gap grew. Singapore improved from an already strong base, moving into third position in the overall ranking. China and Japan did not experience significant changes, and both remain in the Low Proficiency band. The lack of English skills in Central Asia became clearer this year with the addition of Uzbekistan to the index, which, along with Kazakhstan, falls in the Very Low Proficiency band.

LATIN AMERICA IS THE ONLY REGION IN THE WORLD THAT EXPERIENCED A SLIGHT DECLINE IN ENGLISH PROFICIENCY

The region remains the most uniform of any in the world in terms of English skills, with only 11 points separating Venezuela, the region’s lowest scorer, from Argentina, the region’s highest. Underperforming education systems and high levels of economic inequality are hampering efforts to improve English proficiency.

THE MIDDLE EAST HAS THE WEAKEST ENGLISH PROFICIENCY OF ANY REGION, AND ALSO THE MOST ERRATIC

Most countries in the region experienced an improvement or decline of more than one point since last year. The addition of Lebanon to this year’s index made the regional average rise slightly, although the country only falls in the Moderate Proficiency band. Kuwait and Iraq experienced significant improvements, but not large enough to lift them from the Very Low Proficiency band.

EF EPI 2018 RANKINGS

PROFICIENCY BANDS

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

VERY HIGH PROFICIENCY

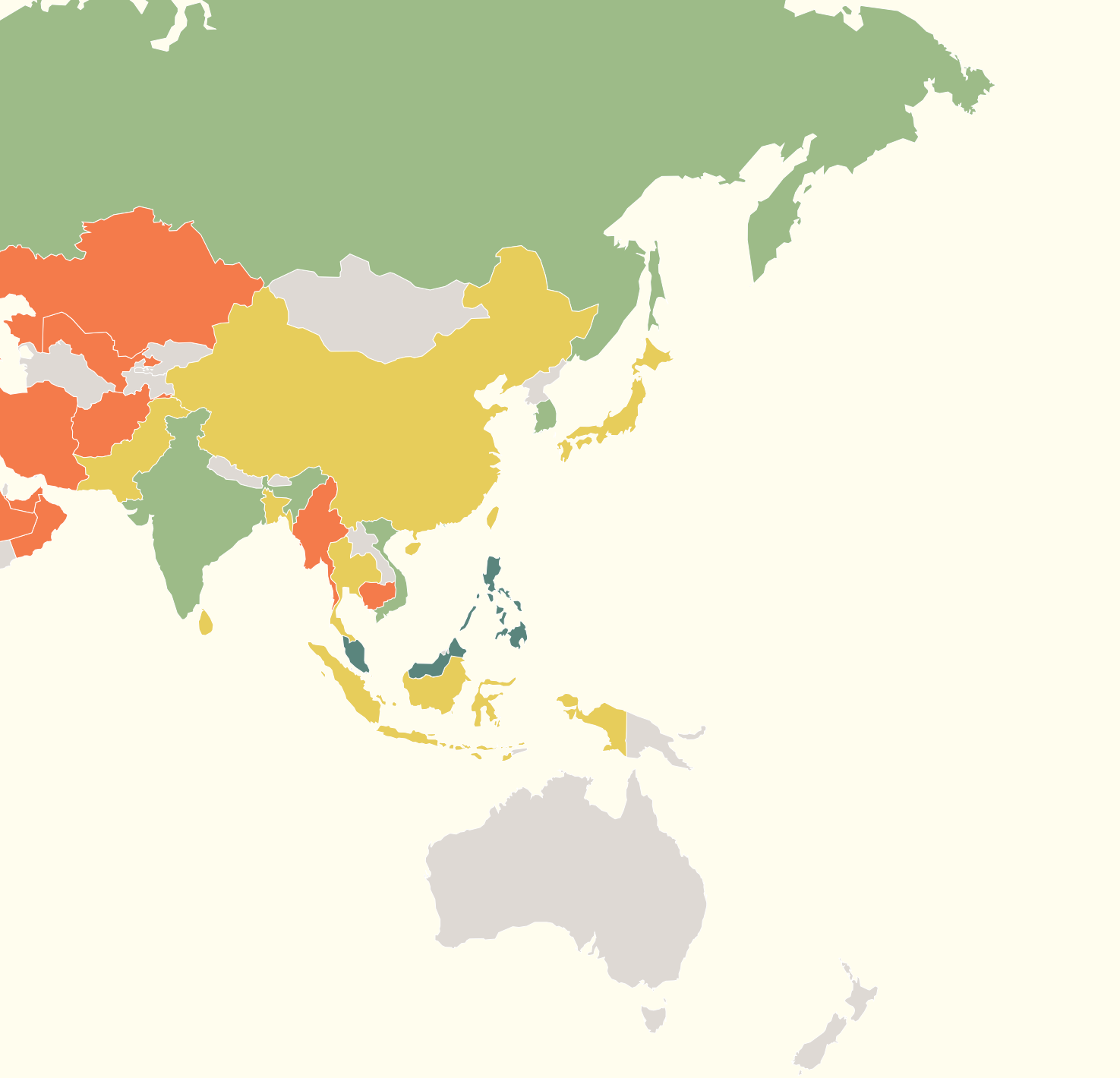
01	Sweden	70.72
02	Netherlands	70.31
03	Singapore	68.63
04	Norway	68.38
05	Denmark	67.34
06	South Africa	66.52
07	Luxembourg	66.33
08	Finland	65.86
09	Slovenia	64.84
10	Germany	63.74
11	Belgium	63.52
12	Austria	63.13

HIGH PROFICIENCY

13	Poland	62.45
14	Philippines	61.84
15	Switzerland	61.77
16	Romania	60.31
17	Croatia	60.16
18	Serbia	60.04
19	Portugal	60.02
20	Czech Republic	59.99
21	Hungary	59.51
22	Malaysia	59.32
23	Greece	58.49
24	Slovakia	58.11
25	Bulgaria	57.95
26	Lithuania	57.81
27	Argentina	57.58

MODERATE PROFICIENCY

28	India	57.13
29	Nigeria	56.72
30	Hong Kong SAR	56.38
31	South Korea	56.27
32	Spain	55.85
33	Lebanon	55.79
34	Italy	55.77
35	France	55.49
36	Costa Rica	55.01
37	Dominican Republic	54.97
38	Belarus	53.53
39	Senegal	53.50
40	Uruguay	53.41
41	Vietnam	53.12
42	Russia	52.96
43	Ukraine	52.86
44	Macau SAR	52.57



LOW PROFICIENCY

45	Georgia	52.28
46	Chile	52.01
47	China	51.94
48	Taiwan	51.88
49	Japan	51.80
50	Pakistan	51.66
51	Indonesia	51.58
52	Albania	51.49
53	Brazil	50.93
54	Ethiopia	50.79
55	Guatemala	50.63

56	Panama	49.98
57	Mexico	49.76
58	Sri Lanka	49.39
59	Peru	49.32
60	Colombia	48.90
61	Bolivia	48.87
62	Egypt	48.76
63	Bangladesh	48.72
64	Thailand	48.54
65	Ecuador	48.52

VERY LOW PROFICIENCY

66	Iran	48.29
67	Morocco	48.10
68	Tunisia	47.85
69	Honduras	47.80
70	El Salvador	47.42
71	U.A.E.	47.27
72	Nicaragua	47.26
73	Turkey	47.17
74	Jordan	47.10
75	Venezuela	46.61
76	Syria	46.37
77	Azerbaijan	45.85

78	Kuwait	45.64
79	Oman	45.56
80	Kazakhstan	45.19
81	Algeria	44.50
82	Myanmar	44.23
83	Saudi Arabia	43.65
84	Afghanistan	43.64
85	Cambodia	42.86
86	Uzbekistan	42.53
87	Iraq	40.82
88	Libya	39.64

EF EPI 2018 CITY SCORES

PROFICIENCY BANDS

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

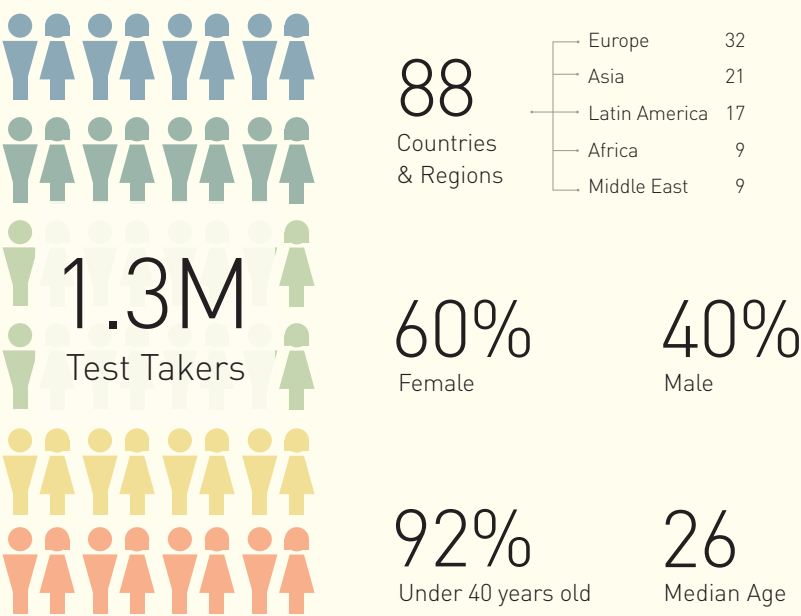
Amsterdam	72.41	Seoul	58.72	Tunis	53.17
Stockholm	71.85	Buenos Aires	58.43	Rio de Janeiro	53.16
New Delhi	69.96	Madrid	58.42	Mexico City	53.11
Johannesburg	69.42	Shanghai	57.91	Bucharest	52.54
Oslo	69.17	Paris	57.49	Monterrey	52.37
Helsinki	68.45	Minsk	57.06	Cairo	52.30
Mumbai	68.28	Kiev	57.01	Quito	51.91
Manila	65.21	Tehran	55.97	Ankara	51.73
Vienna	65.14	Hanoi	55.82	Guangzhou	51.38
Prague	65.10	Moscow	55.59	Bogotá	51.25
Budapest	64.94	Rome	55.33	Lima	51.05
Kuala Lumpur	64.72	Tokyo	55.13	Bangkok	50.93
Brussels	64.53	Karachi	55.08	Kazan	50.62
Warsaw	64.42	Dubai	55.06	Casablanca	50.52
Zurich	64.42	Beijing	54.80	Astana	49.78
Berlin	64.24	Brasilia	54.64	Caracas	48.47
Lisbon	61.86	Jakarta	54.26	Algiers	48.31
Sofia	60.79	São Paulo	54.02	Baghdad	47.43
Lagos	60.29	Santiago	53.57	Riyadh	43.87
Athens	60.19	Saint Petersburg	53.34		



English proficiency scores for over 400 regions and cities, as well as national gender, age, and industry data, are available for download at www.ef.com/epi.

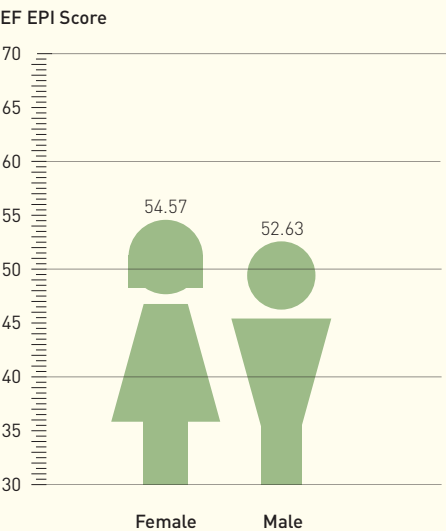
EF EPI FACTS AND FIGURES

WHO ARE THE TEST TAKERS?

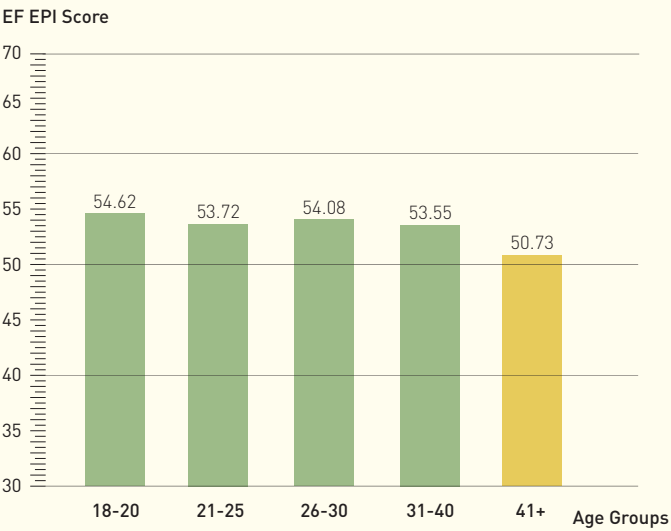


HOW DO GENDER AND AGE AFFECT ENGLISH PROFICIENCY?

GLOBAL GENDER GAP



GLOBAL GENERATION GAP



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

HIGHLIGHTS OF THIS YEAR'S EF EPI:

EF EPI AND POPULATION SIZE

The size of a country's population does not generally correlate with English proficiency, and there are high proficiency countries of all sizes. However, very small countries tend to have above average levels of English proficiency. Small countries have more pressing economic drivers to integrate internationally than their larger neighbors.

30 COUNTRIES WITH FEWER THAN 10 MILLION PEOPLE		32 COUNTRIES WITH 10-50 MILLION PEOPLE		23 COUNTRIES WITH MORE THAN 50 MILLION PEOPLE	
AVERAGE	56.20	AVERAGE	51.13	AVERAGE	53.59
HIGHEST SCORES		HIGHEST SCORES		HIGHEST SCORES	
Sweden	70.72  9.9M	Netherlands	70.31  17.1M	South Africa	66.52  54.8M
Singapore	68.63  5.9M	Belgium	63.52  11.5M	Germany	63.74  80.6M
Norway	68.38  5.3M	Poland	62.45  38.5M	Philippines	61.84  104.3M

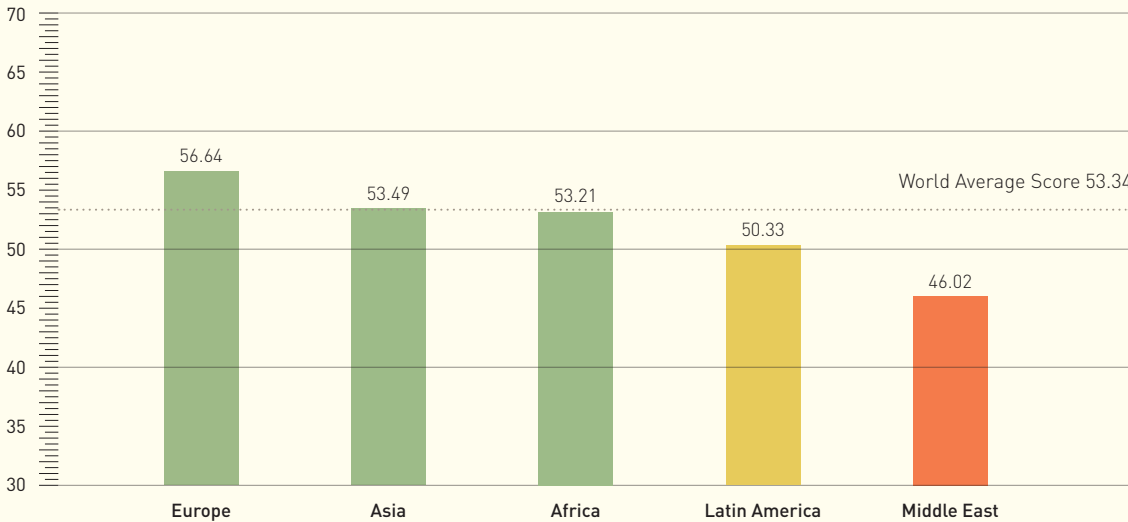
 Population size in millions (M)

EF EPI 2018 REGIONAL TRENDS

	EUROPE	ASIA	AFRICA	LATIN AMERICA	MIDDLE EAST
HIGHEST SCORE	Sweden	Singapore	South Africa	Argentina	Lebanon
LOWEST SCORE	Azerbaijan	Uzbekistan	Libya	Venezuela	Iraq
MOST IMPROVED	+2.12 Czech Republic	+2.60 Singapore	+3.15 South Africa	+1.88 Costa Rica	+2.70 Iraq
LARGEST DECLINE	-2.59 Denmark	-2.24 Bangladesh	-1.16 Tunisia	-1.81 Mexico	-2.12 Syria

EF EPI REGIONAL AVERAGES

EF EPI Score



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

ENGLISH, ECONOMICS, AND TRADE

Most economies are increasingly powered by trade, which represented 56% of world GDP in 2015, up from 44% in 1995. Overwhelmingly, the common language required for these global transactions is English. Not surprisingly, there is a strong correlation between English proficiency and many import and export-related indicators, including logistics performance (Graph A), documents to export, and time to import.

A BETTER ENVIRONMENT FOR BUSINESSES

Every edition of the EF EPI has found a strong correlation between ease of doing business and English proficiency (Graph B). While small-time entrepreneurs and artisans may not need English to do business locally, a growing proportion of businesses operate internationally—as part of a global supply chain, as customers of finished products, or as competitors with similar businesses abroad. According to Professor Tsedal Neeley of Harvard Business School, close to 60% of all multinational organizations already operate

in English. Those that do not will find it difficult to catch up to the first-movers.

THE CORPORATE LANGUAGE

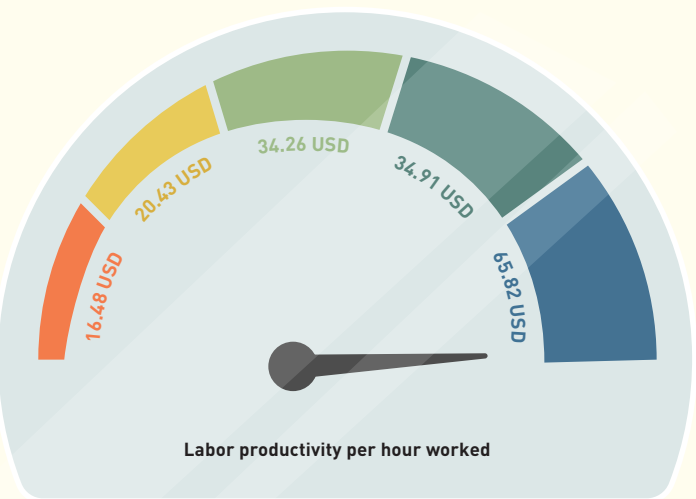
It takes time to develop a workforce with strong English skills, but multinational companies are increasingly convinced of its necessity. Rakuten, the Japanese e-commerce giant, began the transition to using English as their worldwide corporate language in 2010. Today, 80% of the new engineers in their Tokyo offices are non-Japanese, and the company has gone from 200 million users to 1.1 billion by expanding outside its home market. Honda, Nissan, Renault, Siemens, Nestle, Sodexo, and many other multinationals headquartered in non-English-speaking countries have also adopted English as their corporate language in order to remain competitive. Integrating an international workforce demands a common language.

ENGLISH AND ECONOMIC DEVELOPMENT

For economies around the world, higher English proficiency comes with significant benefits. English proficiency correlates with higher gross domestic product, higher average gross income (Graph C), and growth in other key economic indicators. In developing economies, the transition from agriculture or manufacturing to a knowledge-based economic model requires not only technological infrastructure but also skilled adults who are able to sell their services internationally. Accordingly, there is a strong correlation between English proficiency and service exports (Graph D), as well as between English proficiency and productivity. In many places, retail is the single biggest private employer, but with e-commerce growing at an average rate of 20% per year globally, not even this quintessentially local sector is guaranteed to remain local. The future of the workplace is international, and speaking English is one of the basic skills required to gain access.

WORKING SMARTER

English proficiency is positively correlated with productivity as measured by the amount of work produced for each hour of labor.

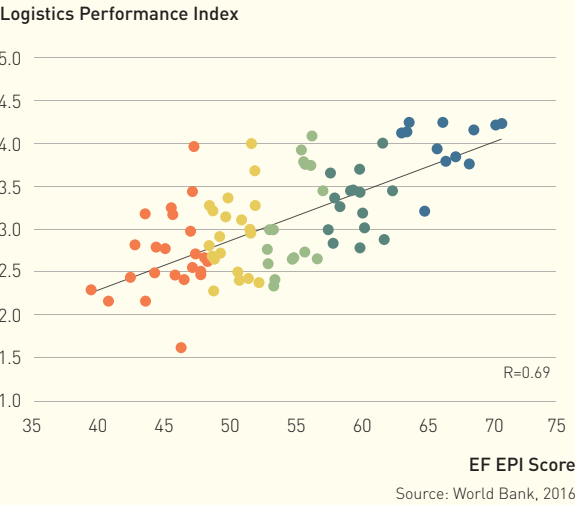


PROFICIENCY BANDS

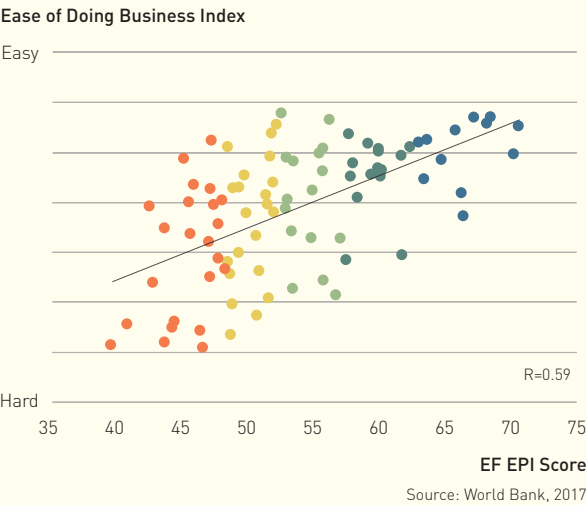
- Very High
- High
- Moderate
- Low
- Very Low

Source: Cato Institute's Human Progress Project, 2017

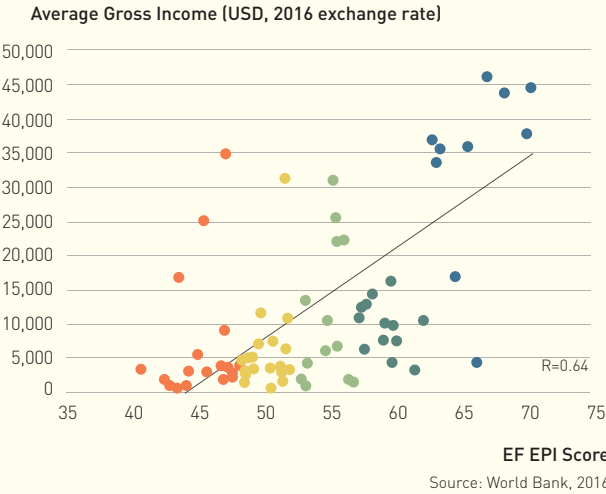
GRAPH A
ENGLISH AND LOGISTICS



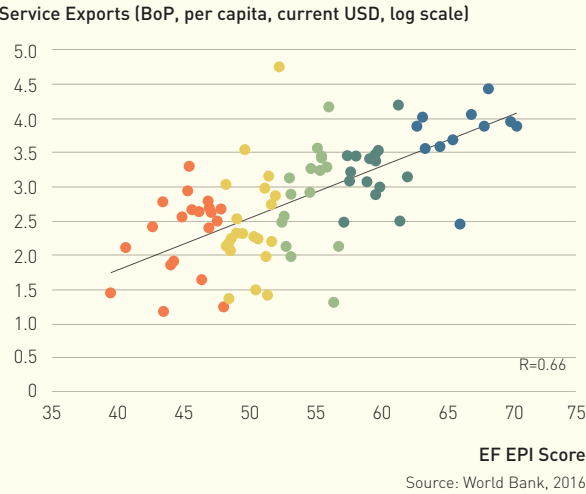
GRAPH B
ENGLISH AND BUSINESS



GRAPH C
ENGLISH AND INCOME



GRAPH D
ENGLISH AND SERVICE EXPORTS



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

ENGLISH AND INNOVATION

A brilliant idea is just as brilliant whether it is explained in Arabic, Swahili, English, or any other language. But, unfortunately, far fewer people will be exposed to it if it is not expressed in English. Today, the most influential platforms for sharing ideas—from academic journals to TED Talks—are English-language forums. Scientists and engineers cannot afford to ignore global innovation because of linguistic barriers, but that need is not limited to academia or the tech sector: professionals in all fields benefit from access to international best practices. From accountants to CEOs, those who speak English leverage more of the world’s knowledge.

SHARING IDEAS

Year after year, we have found a strong correlation between a country’s English proficiency and its investment in R&D, in terms of both capital and human resources (Graphs E and F). Researchers need English to share their findings and access international colleagues’ work. All 100 of the world’s most influential scientific journals—as determined by

SCImago Journal Rank—publish their articles in English, and there is a strong correlation between a country’s English proficiency and the number of scientific and technical journal articles per million people (Graph G). In addition, scientists who publish in English are much likelier to have their papers cited internationally than those who publish in other languages. Because ideas gain momentum when they are shared, increased integration in the global scientific community generates more innovation.

COLLABORATION AND TALENT

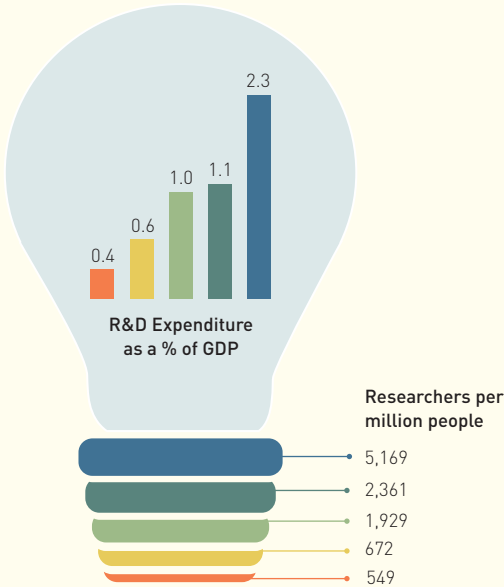
International collaboration is increasingly the norm in all fields, enabled both by digital technology and the ease of long-distance travel, but the economic impact of diversity in corporate environments is only just beginning to be understood. Research over the past two years by management consulting firm BCG has found that companies with below average diversity in their management teams earn 19% less revenue from recently-launched products and services than their competitors. In terms of fostering innovation, they found that diversity of national origins

is the most powerful driver, more powerful than gender diversity, age diversity, diversity of educational backgrounds, or diversity of career paths, although all types of diversity contribute. International teams work in English, so any company looking to build their potential for innovation will need high levels of English proficiency.

We have also found a high correlation between English proficiency and the Global Talent Competitiveness Index (Graph H), a report that assesses the policies and practices that enable a country to attract, develop, and retain skilled workers. While English proficiency allows local talent to participate in global conversations, it is also critical in attracting talent from abroad. A 2017 HSBC survey ranked Singapore, Norway, Germany, and the Netherlands, all very high English proficiency countries, in the top five for their appeal to internationally mobile professionals. (The fifth country was New Zealand). While attracting expats is not every region’s priority, nurturing local talent certainly should be.

BRIGHT IDEAS

English proficiency is positively correlated with several key measures of innovation, including research and development spending and researchers and technicians per capita.

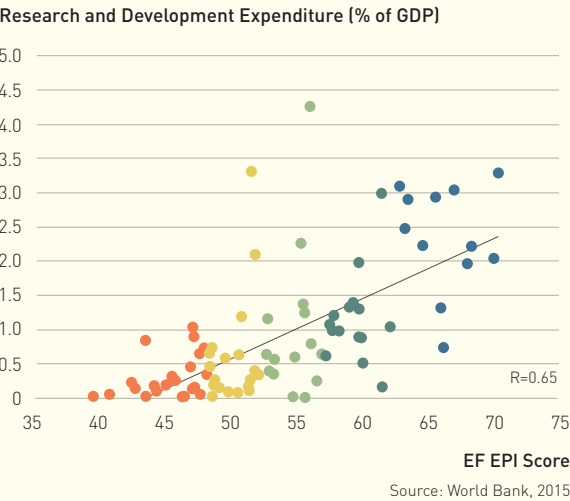


PROFICIENCY BANDS

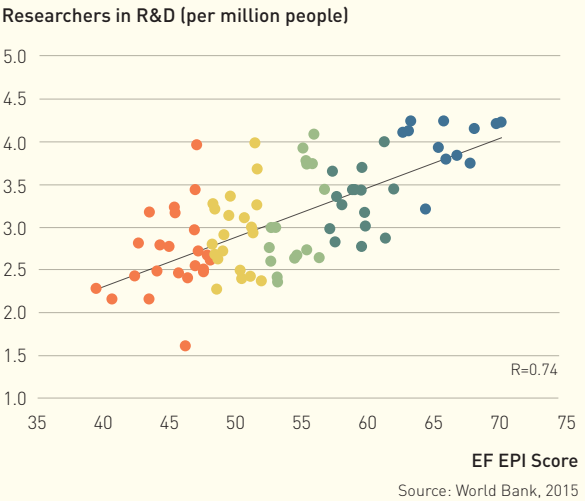
- Very High
- High
- Moderate
- Low
- Very Low

Source: World Bank, 2015

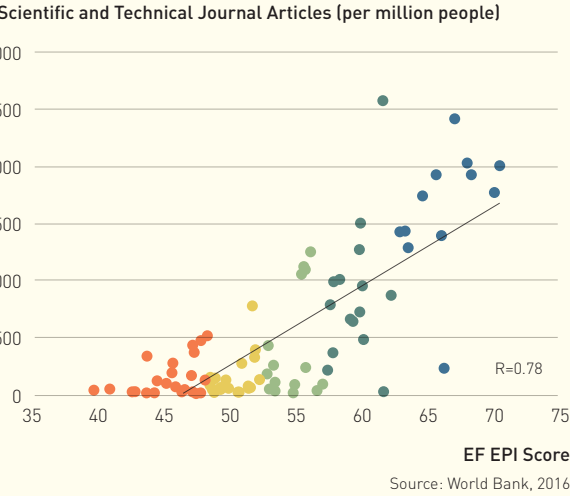
GRAPH E
ENGLISH AND R&D EXPENDITURE



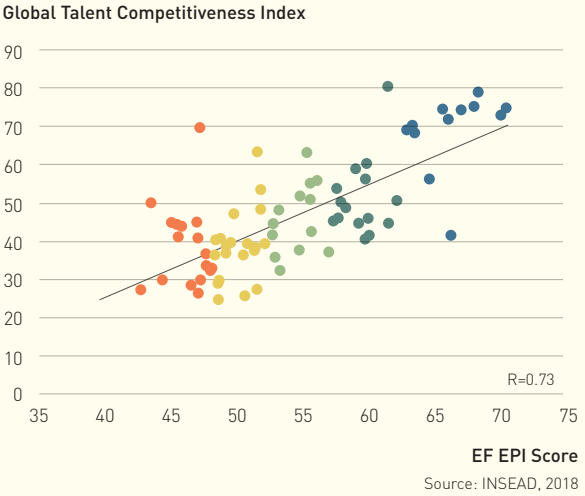
GRAPH F
ENGLISH AND RESEARCHERS



GRAPH G
ENGLISH AND SCHOLARSHIP



GRAPH H
ENGLISH AND TALENT



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

ENGLISH IN THE WORKPLACE

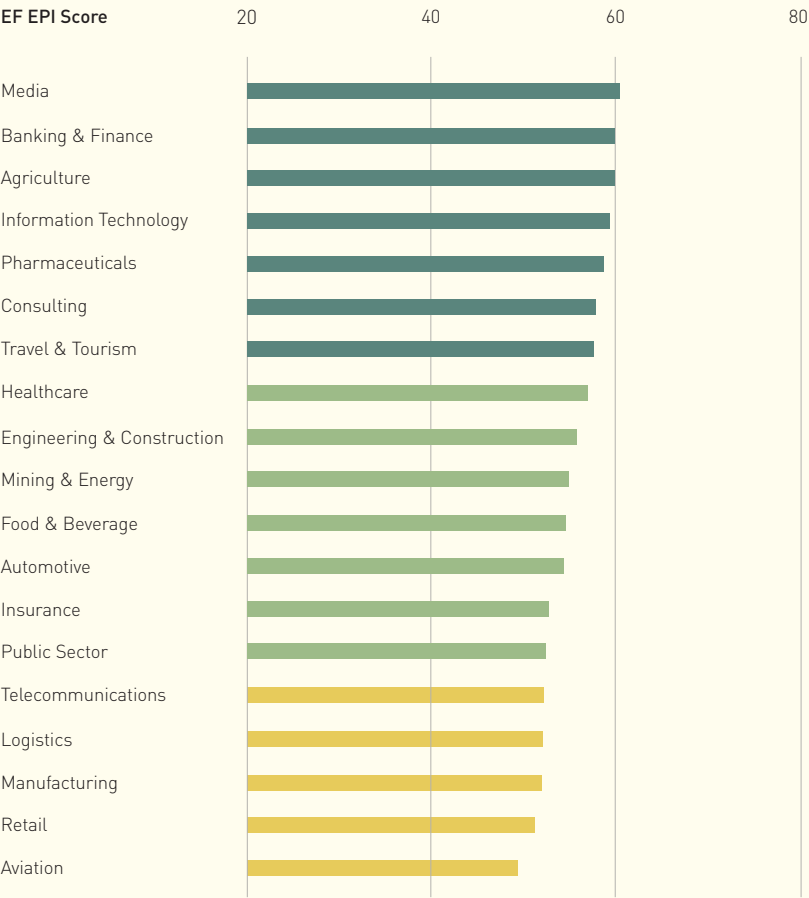
ENGLISH EVERYWHERE

English is necessary for more jobs in more companies than ever before. Where once English skills were a job requirement in particular roles at particular seniority levels, today, supply chains, technical support, customer contacts, documentation, and management hierarchies all cross national borders. The number of multinational enterprises worldwide rose by 25% between 2006 and 2016. In a 2016 survey, more than 70% of companies in 28 non-English-speaking countries reported that English was important for their business, and 11% said it was the main language used.

A CLOSING GAP

Our data indicate another aspect of this trend. While differences in English proficiency still exist between industries, they are primarily at the national level. Worldwide, the gap between the industries with the highest and lowest English proficiency has narrowed enormously. In 2016 it was 19 points; today it is barely 10. This global reduction in skill disparity is entirely thanks to improved proficiency in the weakest industries. More companies are investing in English training, more adults are investing in their own English skills, and more professionals are getting the opportunity to use English at work.

EF EPI BY INDUSTRY



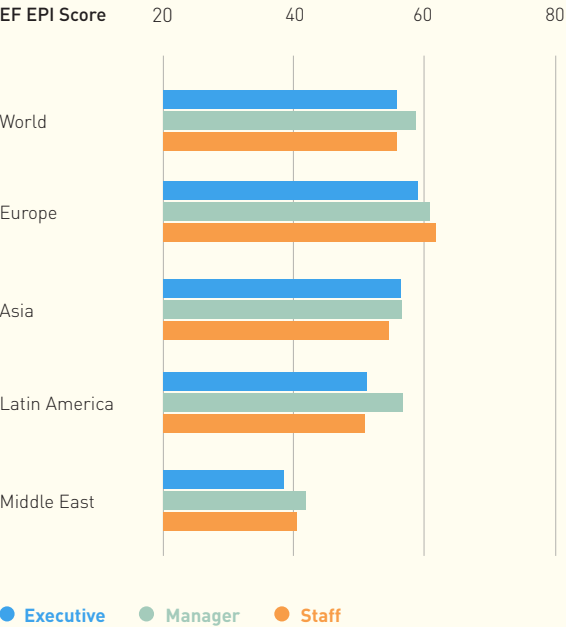
MANAGERS TAKE THE LEAD

Managers speak English better than executives and staff worldwide, especially in regions where the median age skews younger. The gap is widest in Latin America, where despite recent investments in improving English education in schools, the average level of adult English proficiency has declined since last year. Asia and Europe have older populations and smaller proficiency gaps between workers of different seniority levels. Asia is the only region in which executives are leading by example, keeping pace with their management teams in mastering English. In Europe, it is the junior professionals who speak English best.

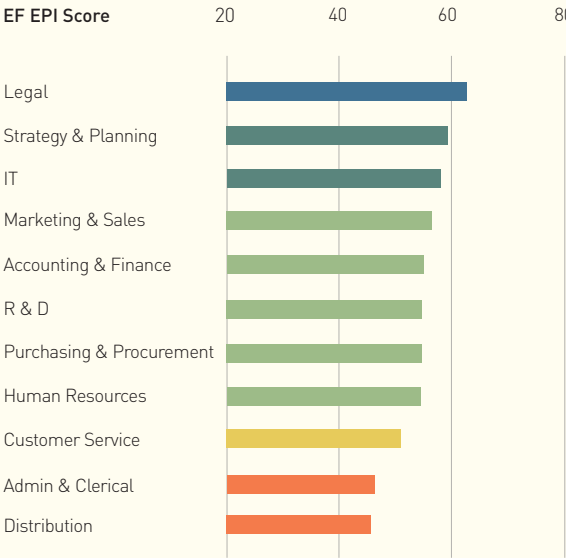
THE JOB FUNCTION DIVIDE

Of all the workplace indicators, job function determines English level most reliably. English levels by job function span all five of our proficiency bands, from very high to very low. This is most likely a recruitment-driven effect of current or past hiring practices. The danger for companies is that instead of one integrated corporate talent pool to develop and deploy, they are creating two parallel classes of employee: an internationally-mobile, English-speaking elite and a locally-limited, non-English-speaking support staff.

EF EPI BY SENIORITY



EF EPI BY JOB FUNCTION



ENGLISH AND SOCIETY

Adult English proficiency is almost a proxy measure of the openness of a society. Where adults have learned to speak English, they are also, on the whole, more internationally mobile and more progressive in their outlook on gender roles. In countries where English proficiency is lower, adults tend to be more traditional, more insular, and more willing to accept power and income inequality. That is not to say that there is a neat cause-and-effect relationship at play here. Instead, it seems likely that the same forces that cause people to adopt English as a global tool for communication also increase openness and reduce inequality.

POWER PLAY

Adult English proficiency correlates closely with Hofstede’s Power Distance Index (PDI), which measures the extent to which the less powerful members of an organization accept that power will be distributed unequally (Graph I). The index captures perceptions about inequality in both professional environments and family structures. A higher score on the PDI is typical of rigid, hierarchical systems in which underlings and the young are expected to obey orders from above. In these societies, high levels of

inequality are the norm, as is lower English proficiency. At the opposite extreme, we find countries and regions where flatter corporate organizations thrive, tolerance of inequality is low, and ideas are valued regardless of a person’s age or seniority. In these places, English proficiency tends to be higher.

Although English doesn’t undermine hierarchy directly, it may contribute to broadening a society’s horizons. For the majority of the one billion non-native English speakers in the world, the goal is to communicate across borders. With that communication comes freedom to observe how the rest of the world operates. One of the strongest correlations of this year’s EF EPI is to the Economist’s Democracy Index. Contact with the outside world inevitably leads to questions about one’s own society, comparisons, and in many cases, change.

WOMEN RISING

In societies with more progressive gender roles, people speak better English. There is a strong correlation between English proficiency and the percentage of women with an account at a financial institution,

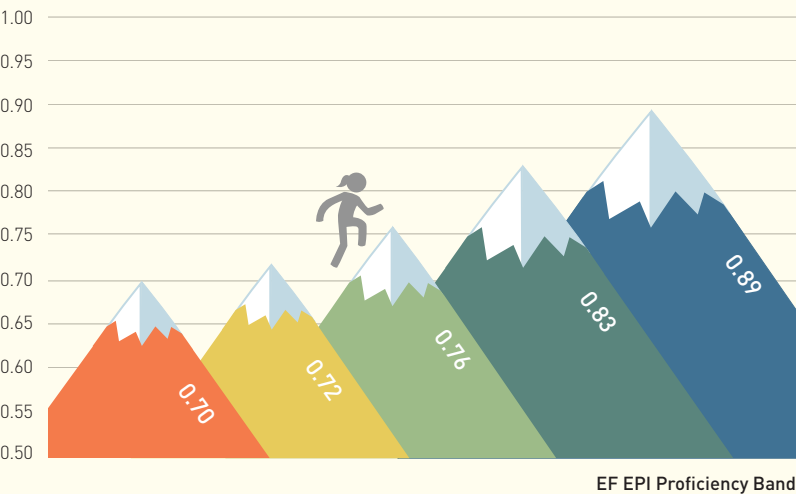
as well as with the percentage of girls enrolled in pre-primary education (Graphs J and K). Every edition of the EF EPI has reported that women speak English better than men, both globally and in almost all countries regardless of region, wealth, or overall English proficiency. Women form an essential part of a skilled 21st century workforce, and countries with the lowest levels of female employment outside the home have the most to gain by ensuring that women have access to education and the job market.

The World Economic Forum’s Global Gender Gap Report measures how well women fare relative to men in terms of economic participation, educational attainment, political empowerment, and health. The EF EPI correlates closely with this index (Graph L). Again, there is no simple cause and effect relationship here. Speaking English does not improve women’s rights. Rather, societies that value gender equality tend to be wealthier, more open, and more internationally-minded, and these are also the places where people speak the best English.

THE GOOD LIFE

The Human Development Index (HDI) ranks the quality of life for a country’s or region’s citizens based on life expectancy, education, and per capita income. As shown by the average HDI scores for each EF EPI proficiency band, English and quality of life are positively correlated.

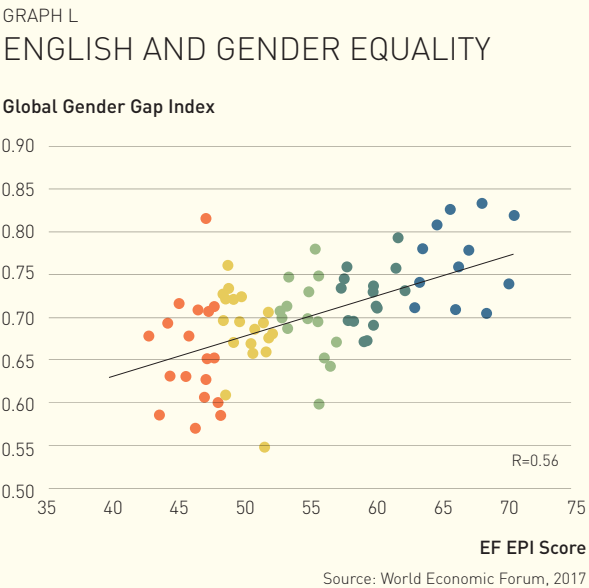
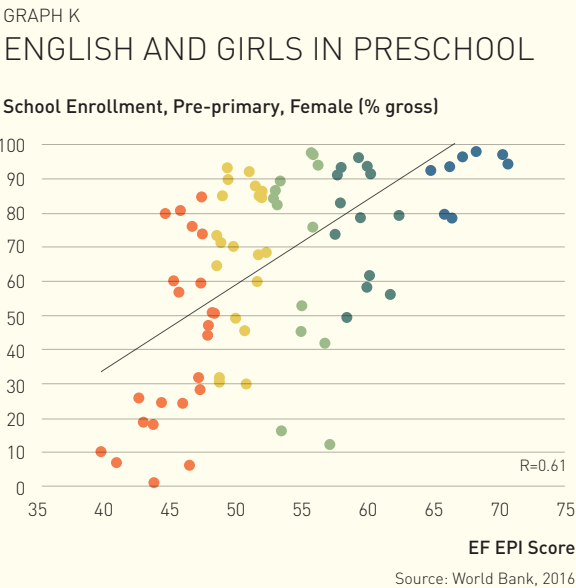
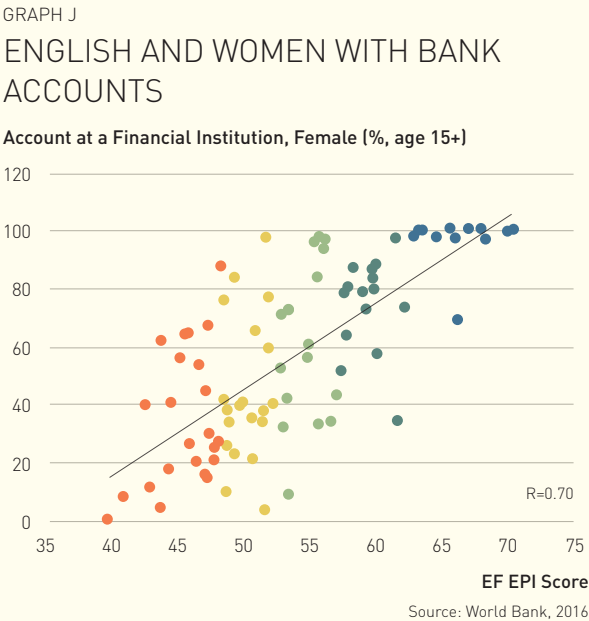
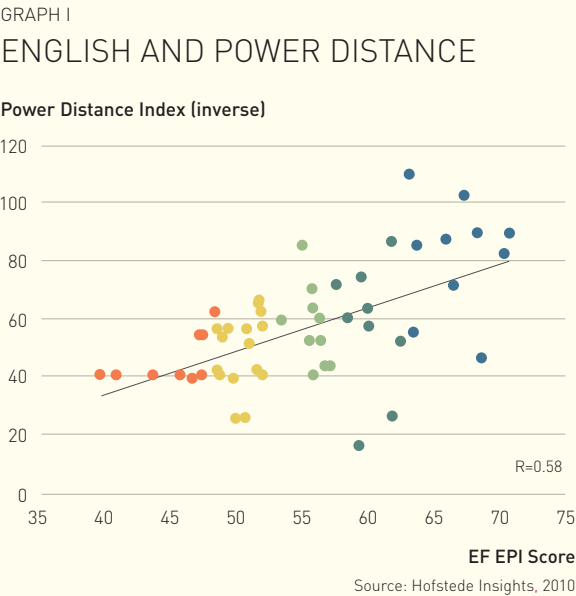
Human Development Index Score



PROFICIENCY BANDS

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

Source: United Nations Human Development Report, 2016



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

ENGLISH AND TECHNOLOGY

Taken together, English proficiency and good Internet connections allow people to access more of the world’s knowledge, find global collaborators, and share their ideas with a wider audience. More than half of the 10 million most-visited websites on the Internet are written in English. Cutting-edge research and innovation in tech almost inevitably requires some facility with the language. There is evidence that technological literacy can also boost English proficiency. Internet use gives people more exposure to the English language. It is a self-reinforcing cycle, with English allowing access to a broader range of information, and international exposure building English skills. As such, higher levels of Internet access are correlated with higher English proficiency, according to measures such as broadband subscriptions and the number of secure servers (Graphs M and N).

A WORLD OF SHARED KNOWLEDGE

Most of the world’s most influential technology companies are American, and almost all of the most commonly used programming languages are based on English vocabulary. More IT documentation and technology research is published in

English than in any other language. As a result, poor English proficiency makes it difficult for tech workers to access key resources in their fields. More broadly, limited access to new research hinders the formation of a technically savvy professional class that can deploy the latest IT infrastructure and manage international e-commerce development.

TECHNOLOGY AND TRADE

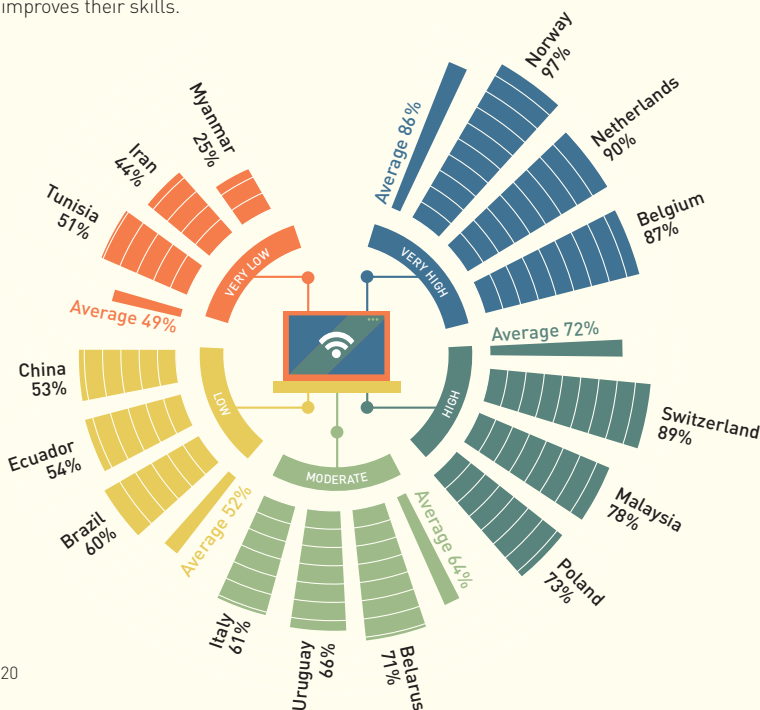
Technology does not just bolster existing trade. It creates entirely new sectors of exchange. According to the WTO, exports of telecommunication, computer, and information services surpassed 1.421 trillion USD in 2016. Europe is by far the largest exporter of these services, accounting for nearly half of global information and computer technology (ICT) exports in the same year. It comes as no surprise that ICT service exports correlate strongly with English proficiency (Graph O), as does manufacturing value added in the technology industry (Graph P). In order to expand into these sectors, developing economies need both technology skills and a workforce capable of communicating in English with international clients.

LEARNING ENGLISH ONLINE

Technology is already one of the most powerful drivers of English language acquisition. Digital tools and platforms expose individual learners to a range of authentic English sources and free them from a top-down approach to instruction. In many cases, technology can deliver higher quality English training than is available locally. In theory, the increasing availability of fast mobile connections and the diversification of both public and private online English training should make it much easier for adults to customize their learning experiences and improve their English outside of formal schooling. Advancements in artificial intelligence, virtual reality, and other emerging technologies could usher in a new era of even more immersive and relevant digital training. In practice, however, many online courses are hampered by low adoption and high attrition rates. For technology-enabled English training to reach its full potential, more providers will need to engage students with compelling design strategies and live online teaching.

VIRTUAL WORLD, REAL SKILLS

Average internet penetration—the percentage of people with Internet access—is higher in countries with better English. Online, English skills allow access to more content, which in turn improves their skills.

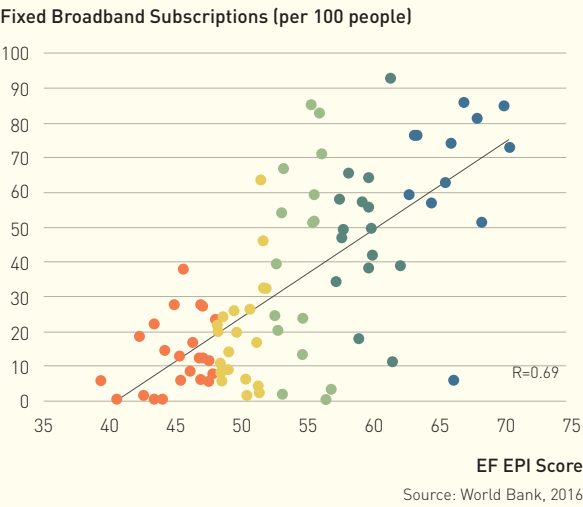


PROFICIENCY BANDS

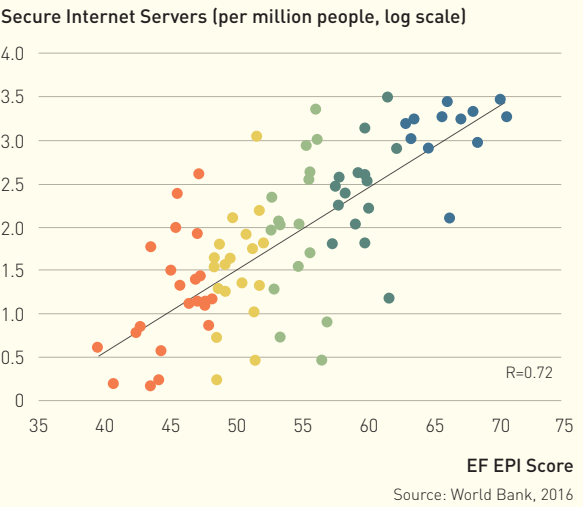
- Very High
- High
- Moderate
- Low
- Very Low

Source: World Bank, 2016

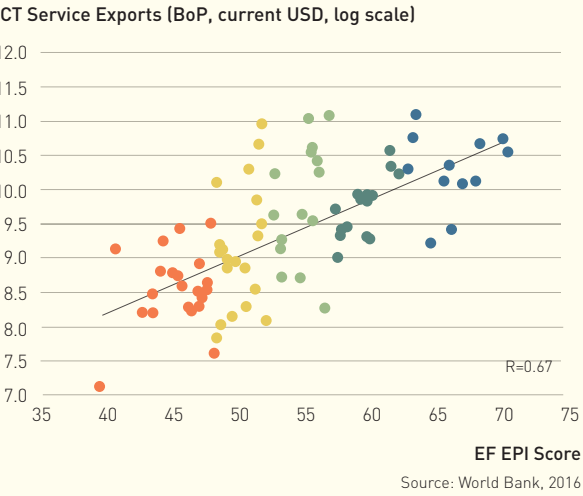
GRAPH M
ENGLISH AND BROADBAND ACCESS



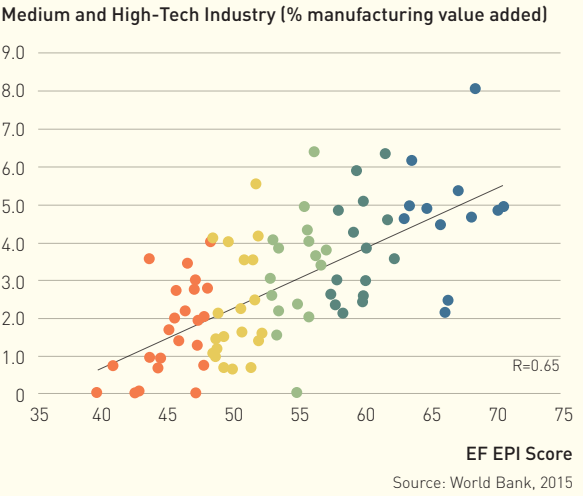
GRAPH N
ENGLISH AND INTERNET SECURITY



GRAPH O
ENGLISH AND ICT SERVICE EXPORTS



GRAPH P
ENGLISH AND IT MANUFACTURING



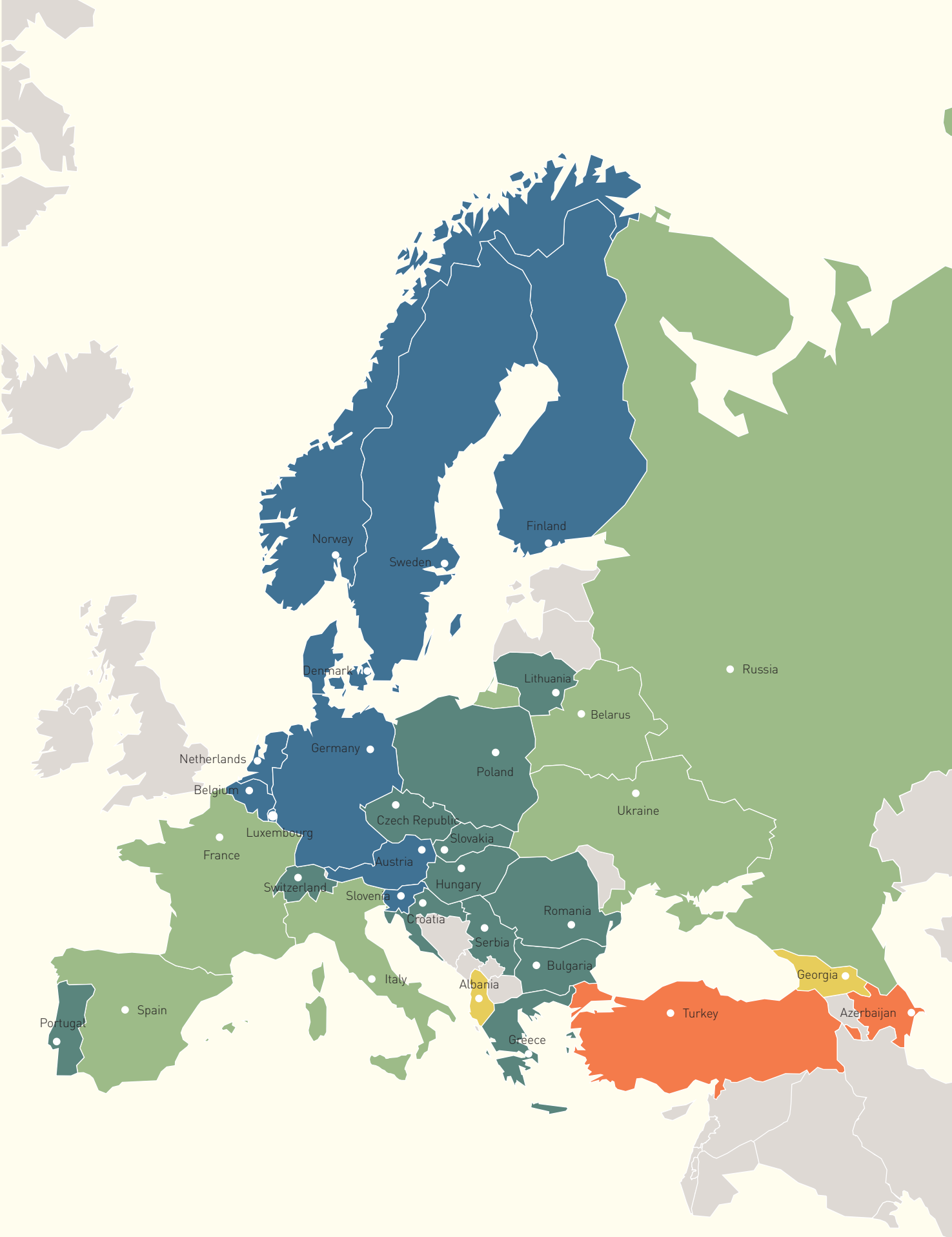
PROFICIENCY BANDS ● Very High ● High ● Moderate ● Low ● Very Low

EUROPE

EF EPI RANKINGS

01	Sweden	70.72	15	Switzerland	61.77	32	Spain	55.85
02	Netherlands	70.31	16	Romania	60.31	34	Italy	55.77
04	Norway	68.38	17	Croatia	60.16	35	France	55.49
05	Denmark	67.34	18	Serbia	60.04	38	Belarus	53.53
07	Luxembourg	66.33	19	Portugal	60.02	42	Russia	52.96
08	Finland	65.86	20	Czech Republic	59.99	43	Ukraine	52.86
09	Slovenia	64.84	21	Hungary	59.51	45	Georgia	52.28
10	Germany	63.74	23	Greece	58.49	52	Albania	51.49
11	Belgium	63.52	24	Slovakia	58.11	73	Turkey	47.17
12	Austria	63.13	25	Bulgaria	57.95	77	Azerbaijan	45.85
13	Poland	62.45	26	Lithuania	57.81			

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



INTERNATIONALISM...PROBABLY

Europe has, by far, the highest English proficiency of any region in the world, and the region's average score improved slightly since last year despite the high baseline.

Of the 27 countries in this year's index with high or very high English proficiency, 22 are in Europe. This success reflects decades of effective policymaking. The world's largest student mobility program, Erasmus+, is run by the EU, with over 700,000 European students and teachers studying abroad each year. Eighty-three percent of European students have begun learning at least one foreign language in school by age 10, and 97% of 13-year-olds are studying English. Modern Europe, forged in the wake of two devastating wars, defines itself by its multilingualism and international collaboration.

EUROPE EXCELS IN ENGLISH

Sweden has returned to its first place position after a two-year absence, despite having welcomed more refugees per capita over the past five years than any other European country. Sweden also scored first in the 2017 European Commission's Innovation Scoreboard, a comparative analysis of 27 indicators, including human resources, investments, and intellectual assets. Scandinavians on the whole have remarkably high levels of English, thanks to strong education systems, daily exposure to English in the media, and an entrenched culture of internationalism.

Central Europe is becoming an increasingly attractive business hub, in part due to high levels of English proficiency and relatively low costs. Economic growth has drastically slowed emigration of young central Europeans to the U.K. and Ireland in the past five years, and many of those who left have begun to return, bringing their English skills with them. The Czech Republic, Hungary, and Romania are experiencing unemployment rates below 6%. GDP per capita at Purchasing Power Parity has more than doubled since 2004 in Romania, Poland, Bulgaria, and Slovakia. English is facilitating global investment in these countries and improving the business environment.

...BUT NOT UNIVERSALLY

Both Italy and France saw their adult English proficiency rise since last year, but not significantly enough to change their regional positions. Both countries lag behind other major European economies. In Italy, a 2018 court decision forbid universities from offering degree programs entirely in English, citing the need to preserve the Italian language. France, under the leadership of its young, English-speaking president, is discussing reforms of its continuing education funding scheme, apprenticeship programs, and secondary school exit exam

to reduce inequality and close a perceived national skill gap. However, protection of the French language has always been an explicit priority there. Whenever English is perceived as a threat to national languages, English proficiency suffers.

Outside the European Single Market, European countries have notably lower English proficiency than their neighbors, with an average score a full 10 points below the Common Market as a whole. Language is not the only obstacle to closer ties with Europe for these countries, but communication barriers do not make progress any easier.

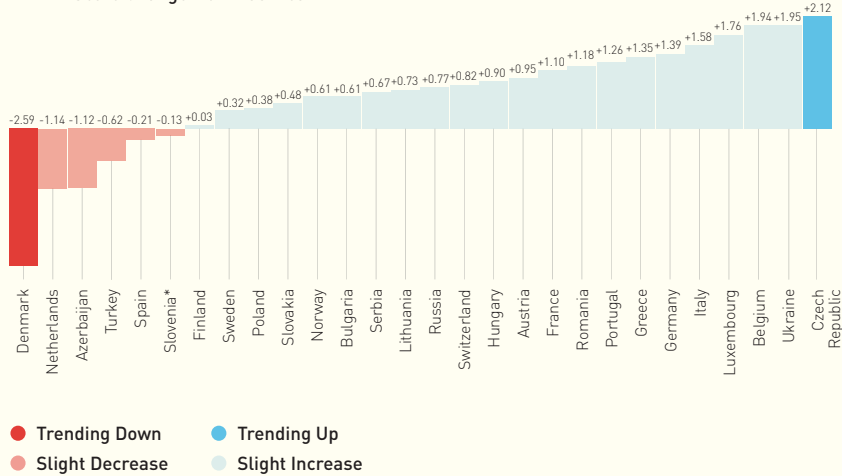
A WIDE GAP REMAINS

Despite the centralizing forces at the heart of the European project, the region remains heterogeneous. Some of that diversity is reflected in wide disparities in English skill. The English proficiency gap between Sweden and France is over 15 points. Include the countries at Europe's borders, and the skill gap between the highest and lowest performers is as wide as anywhere in the world. The threats of populism and anti-European sentiment remain real, driven in part by rising inequalities, immigration, and profound questions of national identity.

EF EPI TRENDS

Europe saw few dramatic score changes this year, but the majority of countries in the region improved, with the Czech Republic improving most. Denmark is the only European country to have experienced a significant decline. Eight European countries moved into higher proficiency bands this year—more than in any other region.

EF EPI Score Change from Last Year

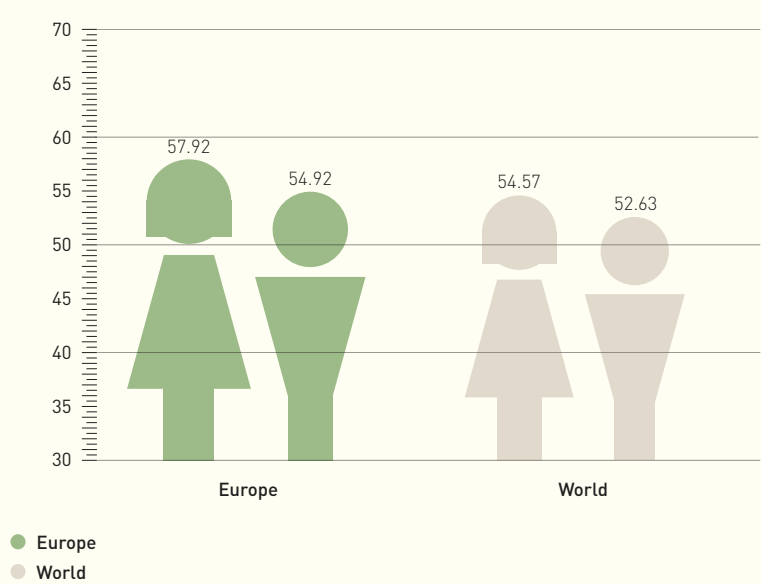


* This country did not appear in the EF EPI seventh edition, so this score comes from earlier EF EPI editions.

GENDER GAP

Average scores for Europeans of both genders remain significantly above global averages. The gender gap in Europe has doubled, with women’s scores rising more than one point compared to last year, while men performed slightly worse. The difference in English skills between women and men in Europe is now twice as large as in Asia and Latin America.

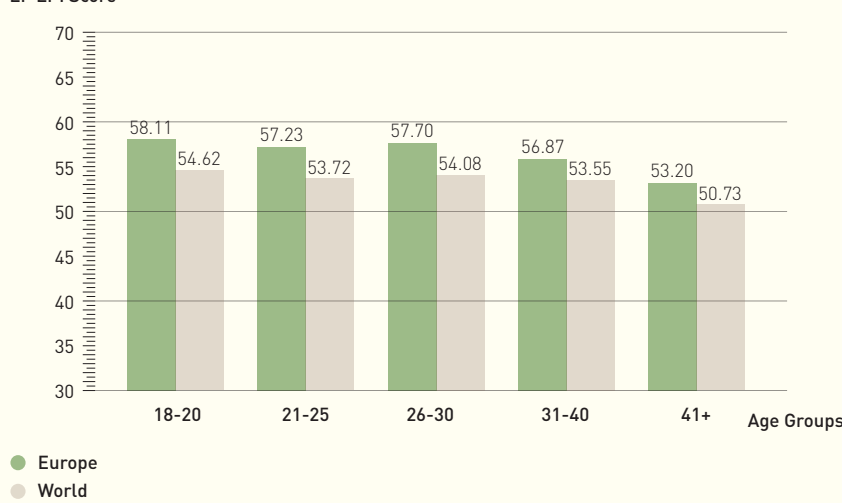
EF EPI Score



GENERATION GAP

Adults in all age groups in Europe performed above global averages. Compared to last year, adults over 25 performed significantly better, with adults over 40 improving the most. Young adults aged 18-20 were the only group to experience a decline.

EF EPI Score

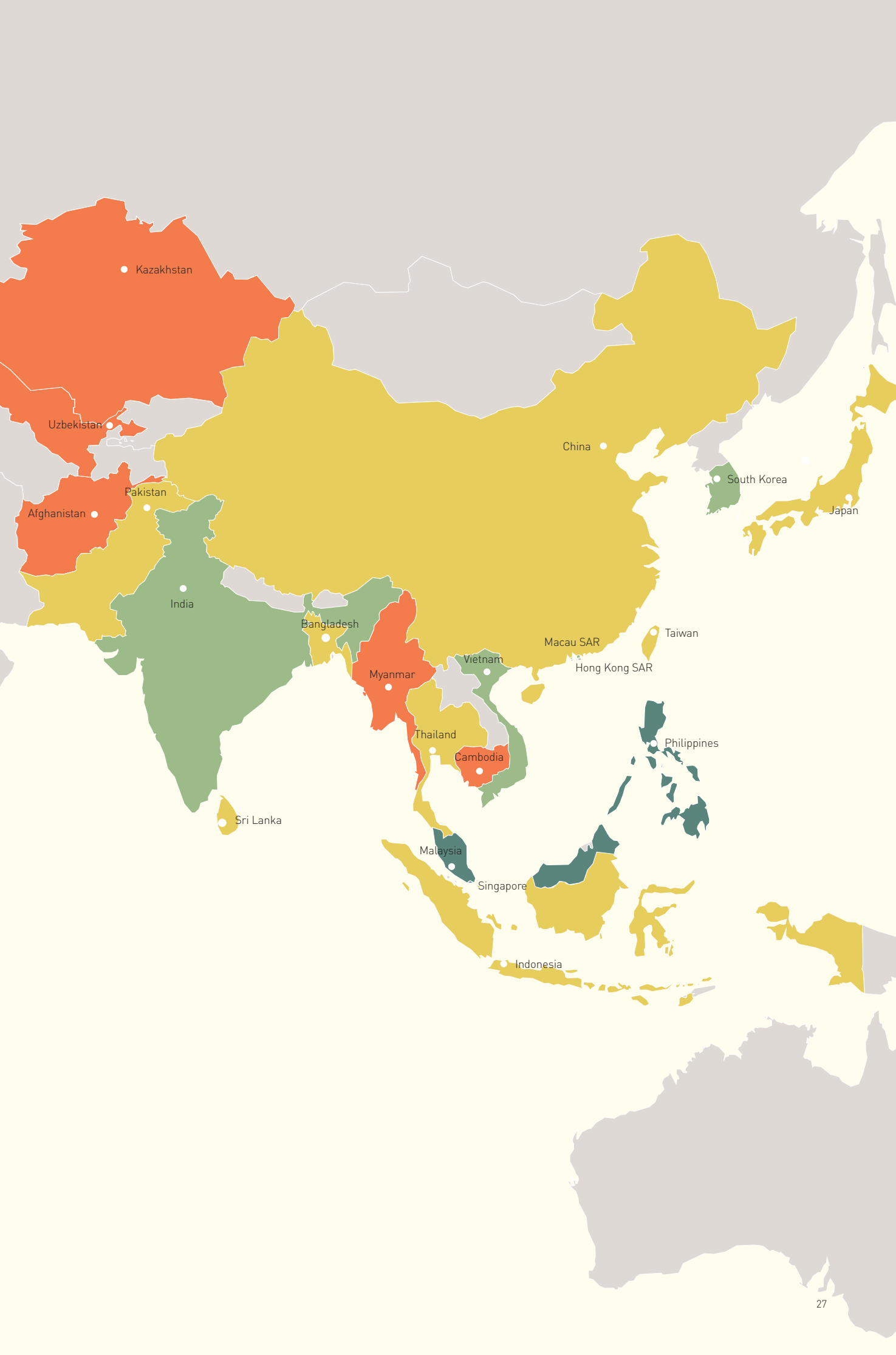


ASIA

EF EPI RANKINGS

03	Singapore	68.63	44	Macau SAR	52.57	63	Bangladesh	48.72
14	Philippines	61.84	47	China	51.94	64	Thailand	48.54
22	Malaysia	59.32	48	Taiwan	51.88	80	Kazakhstan	45.19
28	India	57.13	49	Japan	51.80	82	Myanmar	44.23
30	Hong Kong SAR	56.38	50	Pakistan	51.66	84	Afghanistan	43.64
31	South Korea	56.27	51	Indonesia	51.58	85	Cambodia	42.86
41	Vietnam	53.12	58	Sri Lanka	49.39	86	Uzbekistan	42.53

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



NO HALF MEASURES

Asia has the largest range of English proficiencies of any region, with three countries or territories in the upper quartile of this year’s index and four in the bottom 10%.

Although average adult English proficiency in Asia was stable relative to last year, half of the countries and regions included in both indices experienced a rise or fall of more than one point. This vast and populous continent is anything but monotonous.

APPRECIATING ENGLISH

With rapid growth in trade and technology, Asian countries with strong English proficiency are thriving. Singapore, which has consistently scored in the top 10 of the EF EPI, has had a trade to GDP ratio of over 300% since 1960. Although India is better-known for offshore services, it is the Philippines, with less than 10% of India’s population, which has the larger number of call centers.

In some Asian countries and regions, though, English education is still too focused on rote learning. In particular, China’s transition from a manufacturing economy to a knowledge-based economy requires more people with strong English communication skills. According to The Economist, at its present pace, China’s tech industry will be at parity with America’s within the next 15 years. But despite this rapid progress, less than 25% of Chinese scientific papers published in 2016 cited an international

co-author. Awareness of the value of speaking English in China is extremely high, however. Seventy percent of parents surveyed want their children to learn more English in school. Aspiring English students who are no longer in school or who are dissatisfied with public education offerings have many other options. The private English language training market in China is estimated to be growing at 22% per year.

Japan’s English proficiency declined slightly since last year, but even in this insular country, there are signs of change. Nearly 15% of companies in the Nikkei 225 now have at least one non-Japanese person on their boards, and the number of foreign workers in Japan exceeded one million for the first time in 2017. With its rapidly aging population, Japan would benefit from an influx of younger workers from abroad. English will become an official subject in primary school in 2020, but with no plans for teacher retraining, Japan will have to do more if it wants to raise its level of English.

SWEEPING REFORMS

In many countries, deficiencies in English education reflect much larger systemic issues. Just 2% of GDP is spent on education in Myanmar, and a third of

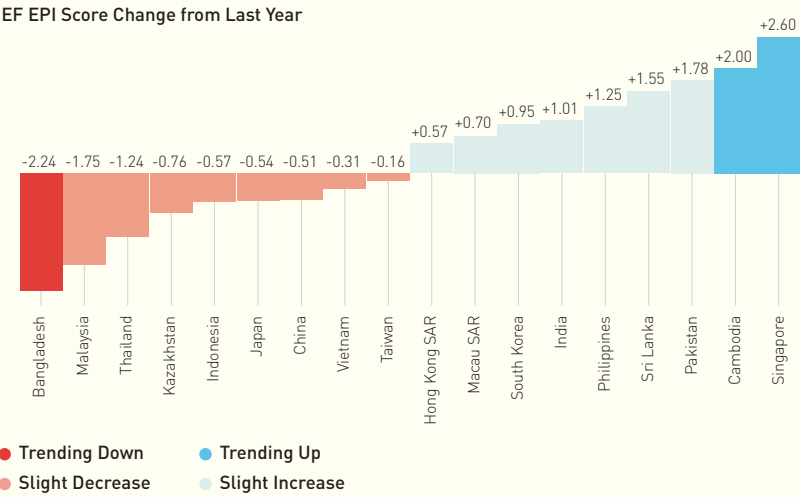
teachers in Bangladesh are not certified to teach. Facing severe educational gaps, Pakistan is reforming its schools at an extraordinary pace, banking on privatization to improve an underperforming system. Private providers have taken over 4,300 schools in Punjab and are expected to take over 10,000 in the region before the end of this year. Private money currently pays for more of Pakistan’s education system than the government does. It remains to be seen whether this privatization push will improve educational outcomes, but there is evidence that in severely underperforming systems, expanding public-private partnerships is a faster solution than system-wide reform.

WORKERS LEFT BEHIND

Informal and temporary employment is widespread in many parts of Asia, meaning that relatively few workers have access to ongoing, employer-subsidized education to improve their English skills. More than half of South Korea’s workforce is employed on temporary contracts, and 90% of India’s workforce is employed without a contract at all. Teaching English in schools is important, but in countries with an aging population, it will be impossible to develop English proficiency without helping adults learn English as well.

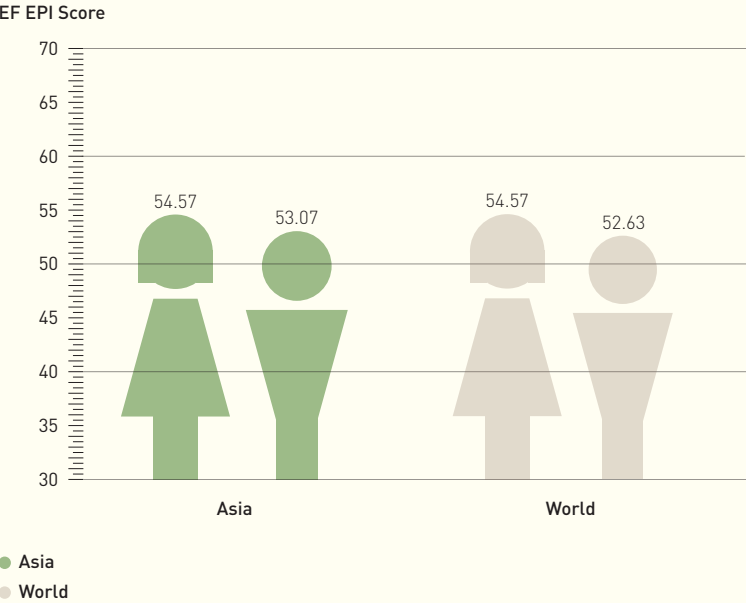
EF EPI TRENDS

The 18 countries and regions profiled in Asia are evenly divided between nine that improved and nine that did not. Singapore and Cambodia posted significant increases in their scores this year, while Bangladesh experienced a significant decrease. Only Sri Lanka and Macau SAR moved from a lower proficiency band to a higher one.



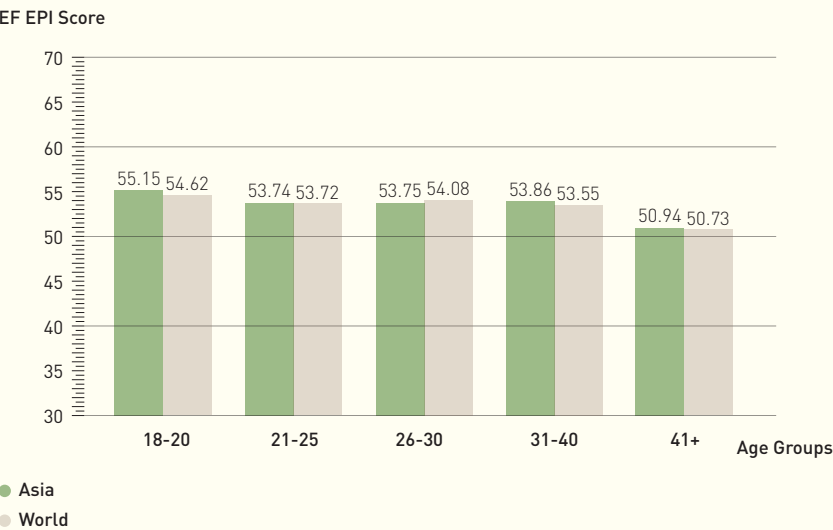
GENDER GAP

Asian gender scores are on par with global averages. Asian women improved their English slightly while men's scores declined slightly, so, as in Europe, the gender gap in Asia has widened significantly, increasing from half a point last year to one and half points this year.



GENERATION GAP

An age gap in English proficiency has emerged in Asia this year. This age gap is in line with worldwide trends, but it is new to Asia, where previously most age groups scored similarly to each other. Except for 18-20 year olds, all Asian age groups saw their proficiency scores decline, with adults over age 40 declining most.



LATIN AMERICA

EF EPI RANKINGS

27	Argentina	57.58	59	Peru	49.32
36	Costa Rica	55.01	60	Colombia	48.90
37	Dominican Republic	54.97	61	Bolivia	48.87
40	Uruguay	53.41	65	Ecuador	48.52
46	Chile	52.01	69	Honduras	47.80
53	Brazil	50.93	70	El Salvador	47.42
55	Guatemala	50.63	72	Nicaragua	47.26
56	Panama	49.98	75	Venezuela	46.61
57	Mexico	49.76			

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



GROWTH WITHOUT PROGRESS

Latin America is the only region in the world to have experienced a decline in average adult English skills since 2017.

This finding reflects the addition of Bolivia, Honduras, and Nicaragua to the index, all of which have scores below the regional average, but the main downward drivers are Mexico and Brazil, the two most populous countries in the region, which both registered declines in English proficiency. In the past decades, Latin America has made enormous progress in ensuring that all children have access to education, but the region still suffers from high levels of economic inequality, fragile democracies, and unacceptable levels of violence, all of which undermine the development of a skilled workforce.

A BROKEN SYSTEM

Although children in some rural areas still lack access to education, the primary challenge for schools in Latin America is poor educational outcomes. UNESCO test results indicate that 50% of third-grade pupils in the region have not achieved a basic level of competency in mathematics, and 30% have not achieved basic competency in literacy. The latest PISA results found a similar pattern among secondary students. This skill deficit reflects broader problems within education systems that impact English language instruction as well. Overcrowded schools, low teacher wages, and inadequate teacher training are all contributing factors.

The educational situation in Argentina, Chile, and Costa Rica, with their highly diversified economies and strong university attendance rates, seems very different from places like Venezuela and Nicaragua. Judging by their English proficiency levels, though, these countries aren't the polar opposites they appear. In fact, Latin America has the narrowest spread of English proficiency scores in the world, with fewer than 12 points separating the highest proficiency country from the lowest. It is striking that, despite having a shared language, most countries in the region trade more with the United States, the EU, and China than with each other.

REFORMS TAKE TIME

Costa Rica improved its English proficiency the most out of any country in the region since last year. Because of major reforms in teacher training and initial qualification, more than 95% of teachers in Costa Rica now hold a tertiary degree, and there is healthy competition for available jobs. Still, teacher assessments administered in 2015 showed that 40% of English teachers had not mastered the content of the curriculum that they were expected to teach. Colombia, Ecuador, and Peru have all also launched English teacher retraining programs in the past five years.

TACKLING INEQUALITY

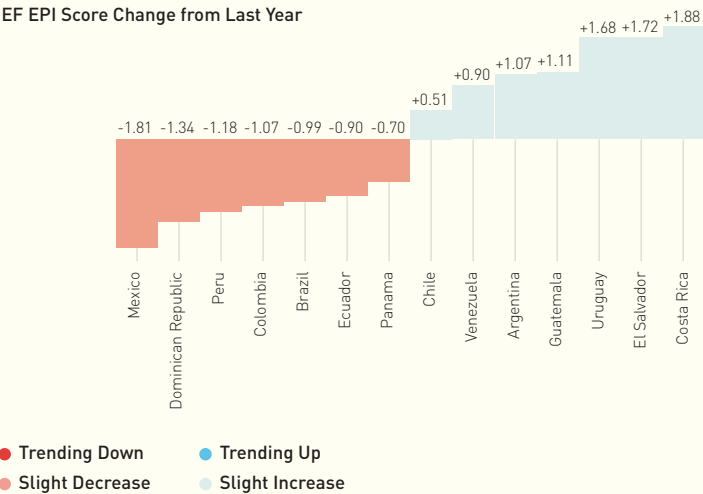
Latin America is in the midst of a skills crisis, and on-the-job training is weak. Only about 10% of workers in the region receive any training in a given year, compared with about half of workers in Europe. This is in part because of the high rates of employment in the informal sector, where small family businesses dominate the landscape. In Peru, 70% of the workforce was employed in the informal sector in 2013, and in the region as a whole, half of all workers work informally, according to the International Labor Organization. When adults don't have access to professional training or opportunities for career growth, productivity and English proficiency can't develop, the possibility for advancement diminishes, and existing inequalities are reinforced.

Inequality is perhaps the greatest challenge facing Latin America. Although both income and wage inequality declined throughout the 2000s in the region, according to the latest World Bank data (2016), eight of the world's 20 most unequal countries are in Latin America. Inequality is a multifaceted problem, but stronger education systems—including stronger English education—are part of the solution. English provides access to skills and global networks that can help drive social mobility.

EF EPI TRENDS

Unlike every other region of the world, no Latin American country experienced a significant change in score. Argentina rebounded from a slight decline last year that had placed it in the Moderate Proficiency band. Uruguay's modest improvement propelled it from Low to Moderate.

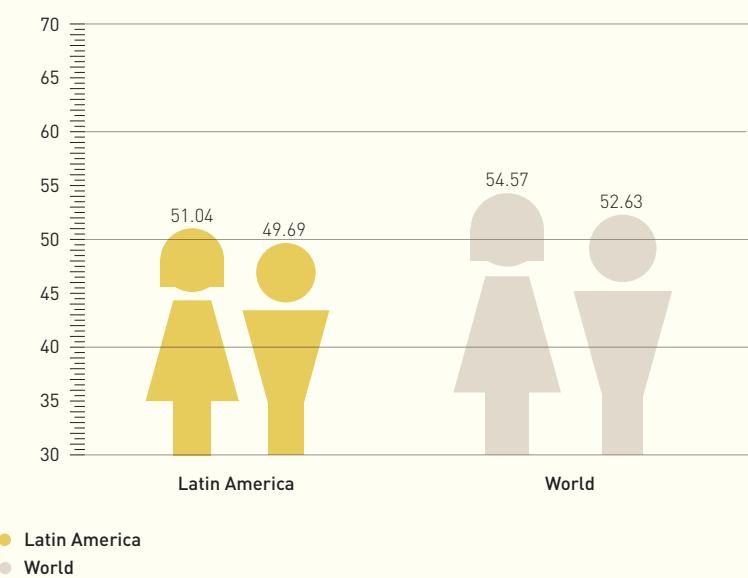
EF EPI Score Change from Last Year



GENDER GAP

Latin American men and women both score significantly below global averages. In previous editions, we have found that Latin America was the only region without a gender gap in English proficiency. That is no longer true. Women in the region improved slightly while men declined, leaving a gap that is of comparable size to the one in Asia.

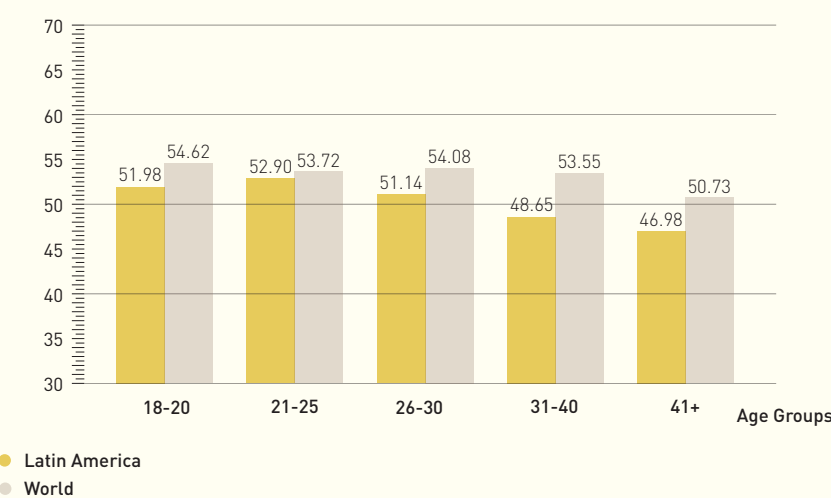
EF EPI Score



GENERATION GAP

All age cohorts in Latin America perform below global averages, with adults over 30 reporting the widest skill deficiency compared to their peers abroad. The highest proficiency age group in the region has shifted from 18-20 to 21-25 this year, which may indicate improving higher education in the region. The slight decline in proficiency recorded among the youngest age cohort is, however, less promising.

EF EPI Score

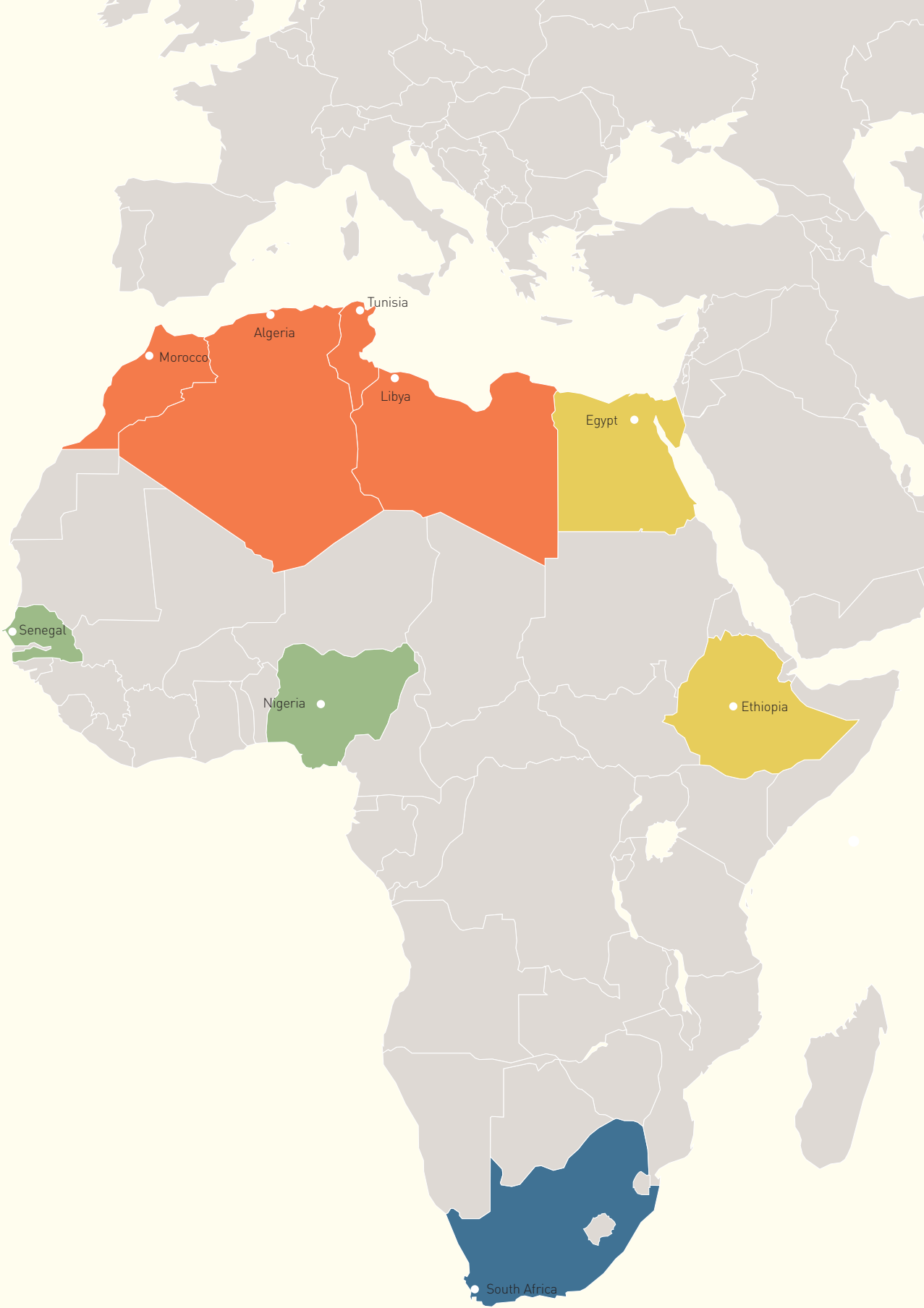


AFRICA

EF EPI RANKINGS

06	South Africa	66.52	67	Morocco	48.10
29	Nigeria	56.72	68	Tunisia	47.85
39	Senegal	53.50	81	Algeria	44.50
54	Ethiopia	50.79	88	Libya	39.64
62	Egypt	48.76			

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



BURSTING WITH POTENTIAL

Between 2016 and 2017, English proficiency scores in Africa improved more than in any other region of the world.

In part, this finding reflects the exclusion of Angola and Cameroon from this year’s index due to a lack of data. A much stronger factor, though, is substantial improvement in several of the continent’s most populous countries. Egypt and Nigeria both experienced significant gains, and South Africa’s EF EPI score rose more than any other country in the world. Today, average adult English proficiency scores in Africa are similar to those in Asia, although the limitations of our data set, which only includes nine African countries, make it difficult to get a complete picture of the continent.

A PRACTICAL APPROACH

South Africa, with the highest English proficiency measured on the continent, has eleven official languages, including English. In a country with so many linguistic communities, multilingualism is the norm. Only 10% of the population speaks English as a native language, according to the 2011 census, but English is widely used in the media and as a bridge language, particularly in urban areas. English has emerged as the language of government and higher education because, lacking strong ethnic or colonial ties, it is perceived as more inclusive.

In West Africa, Nigeria and Senegal are trying to build adequate infrastructure and provide quality education for rapidly growing populations, and both countries have achieved moderate English proficiency among adults. In Nigeria, urban elites are usually native English speakers, but, outside of cities, English is spoken far less often, even though it is the country’s only official language. In Senegal, where French is the only official language, English is becoming important as well. In both countries, English clubs, conversation groups, and mobile learning platforms are increasingly popular. The approach to English in West Africa tends to be highly utilitarian, with practical communication as the core objective instead of mastery of technical grammar rules. That kind of pragmatic focus pays off.

MAKING ROOM FOR ENGLISH

North Africa is different from the rest of the continent in many ways, including its very low English proficiency. Adults in North Africa speak English at levels similar to those in the Middle East. However, multilingualism is common in North Africa, and Algeria, Morocco, and Tunisia have complex linguistic landscapes, with local dialects of Arabic,

Berber, French, and Modern Standard Arabic all serving various roles in private life, the education system, and the public sphere. English is a relative newcomer to the mix, but it’s increasingly valued, particularly for its neutrality and business potential. In Egypt, where the private sector has stagnated, this year’s improvement in English proficiency may come as welcome news. More openness and international trade would benefit North Africa considerably.

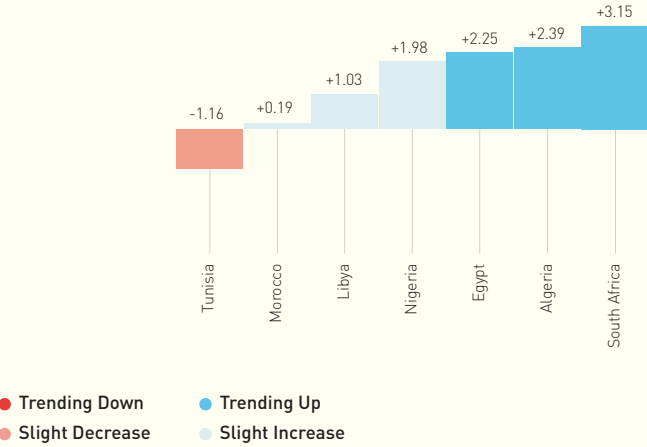
DIVERSE OBSTACLES

Different countries in Africa face different obstacles to developing English proficiency. Some, like Tunisia and Morocco, have labor markets with an oversized public sector and high levels of youth unemployment—conditions that offer few incentives for learning and often push the most ambitious students overseas. Others, like Ethiopia, have low-quality education systems or a lack of school infrastructure. Still others, like Libya, are in the midst of armed conflict. It is our hope that in the coming years, more African adults will test their English so that we can get a clearer picture of adult proficiency levels on this vast and diverse continent.

EF EPI TRENDS

Almost every African country in the EF EPI reported an improvement in English proficiency this year, with more countries experiencing significant improvement than any other region. Egypt moved to a higher proficiency band. South Africa reported the largest proficiency increase of any country or region in the world. Tunisia, the only African country in the index to experience a slight decline, dropped from the Low to the Very Low band.

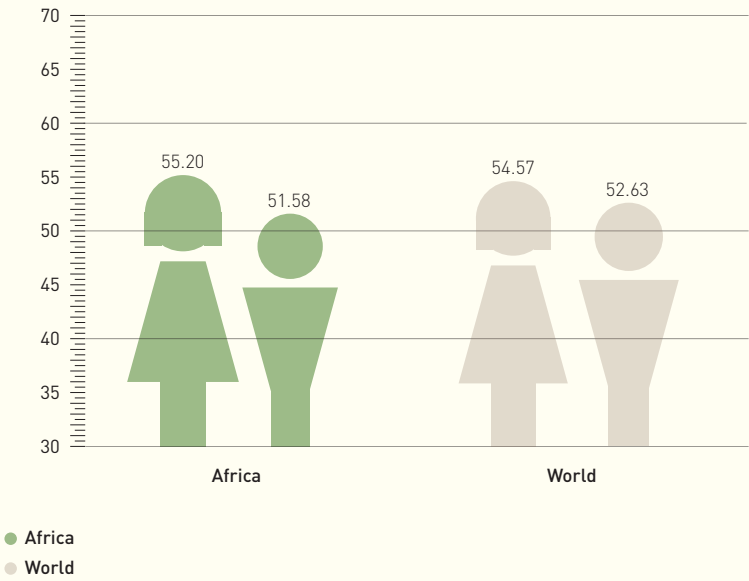
EF EPI Score Change from Last Year



GENDER GAP

The gender gap in Africa remains wider than any other region and it has further widened this year. African women drove this change by improving their English proficiency more than any other gender group in the world. Their skills are now ahead of those of European men and only slightly behind those of European women.

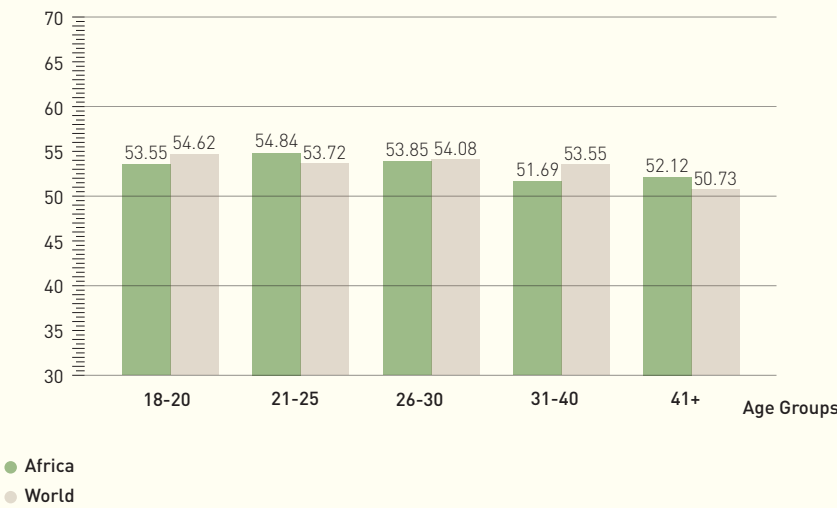
EF EPI Score



GENERATION GAP

All African age cohorts over age 20 improved their English this year, with adults aged 26 to 30 improving most. Several African age cohorts remain slightly below global averages, although adults over 40 outstrip them. As in Latin America, the highest proficiency age group in Africa has shifted from adults aged 18 to 20 to those aged 21 to 25.

EF EPI Score



MIDDLE EAST

EF EPI RANKINGS

<div><div></div></div> 33 Lebanon	55.79	<div><div></div></div> 78 Kuwait	45.64
<div><div></div></div> 66 Iran	48.29	<div><div></div></div> 79 Oman	45.56
<div><div></div></div> 71 U.A.E.	47.27	<div><div></div></div> 83 Saudi Arabia	43.65
<div><div></div></div> 74 Jordan	47.10	<div><div></div></div> 87 Iraq	40.82
<div><div></div></div> 76 Syria	46.37		

PROFICIENCY BANDS Very High High Moderate Low Very Low



STRUGGLING TO TRANSITION

The location of the Middle East, sitting at the meeting point of three continents, heavily influences trade, geopolitics, and education systems in the region.

However, despite its status as a crossroads, the Middle East has lower English proficiency than any other part of the world. This is also one of the youngest regions in the world, with an average age of just 25, giving it enormous potential for change.

OPENING UP

The countries of the Gulf Cooperation Council (GCC) all recognize the need to move from petroleum-based economies to other models, and they have recently launched a wave of government-led initiatives to invest in jobs and education, many of which could lead to better English proficiency. Among these initiatives is Saudi Arabia's Vision 2030, which aims to diversify the country's economy through foreign investment and tourism, and the U.A.E.'s Vision 2021, which aims to transform the country into a knowledge based economy. The U.A.E. has the highest English proficiency score of the GCC countries. The majority of the country's population is foreign-born, making the need for a shared language like English more immediate in daily life.

Saudi Arabia is the largest Arab economy and home to King Abdulaziz University, the highest-ranked university in the region

according to the 2018 Times Higher Education World University Rankings. However, its population is spread over a huge and unevenly-developed geography, leading to varying levels of access to English instruction in schools. Young Saudis will need English to meet the demands of the new, more globalized local market their leadership envisions, in which women will work alongside men. English training and vocational upskilling programs will be essential to achieving this cultural transformation.

Lebanon is included in the index for the first time this year. English proficiency in Lebanon is well above the regional average, which lifted the overall score for the region slightly. The majority of Lebanese university and private schools use languages other than Arabic, making the country more multilingual than most others in the region. Nearby Jordan has English proficiency levels more in line with regional averages, even though the majority of its universities use English as their language of instruction. This disparity might be explained by the wide gap between the level of English instruction in public schools and the English required at the university level, a phenomenon unfortunately found in almost

every Arab country. Most adults don't have the opportunity to attend university and thus never get to plug this proficiency gap.

REFUGEES IN CRISIS

Conflicts in Syria and Iraq have resulted in large numbers of displaced people and a complete halt to education in some cities. More stability raises hopes of restoring public education, but for the millions of people suffering violence and hardship, there are more pressing needs than learning English.

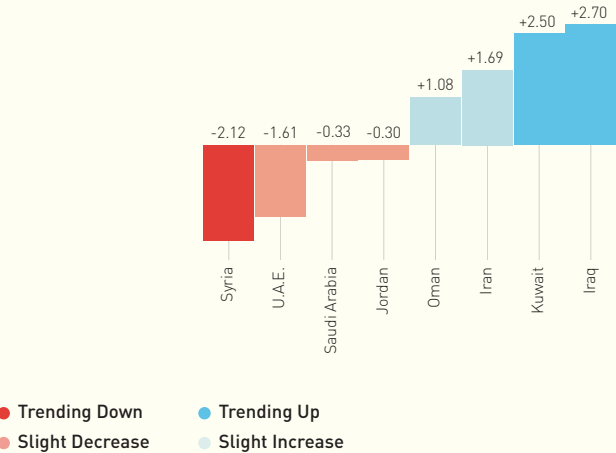
AN UNCERTAIN FUTURE

Fragile economies, persistent conflict, and over-reliance on public sector employment are among the challenges facing Middle Eastern countries that want to equip their youthful populations with the skills required for the global workforce. Meeting these challenges could have a transformative effect on the region, and improving the region's poor English proficiency will be an essential part of that transition. It remains to be seen, though, whether such a transition can be made smoothly amid regional tensions and a changing global energy market.

EF EPI TRENDS

Like Latin America and Asia, the Middle East is evenly divided between countries that improved and countries that didn't. Iraq and Kuwait experienced significant improvements this year, but not significant enough to move them to a higher proficiency band. The United Arab Emirates dropped slightly, but the decline moved it from the Low to the Very Low band.

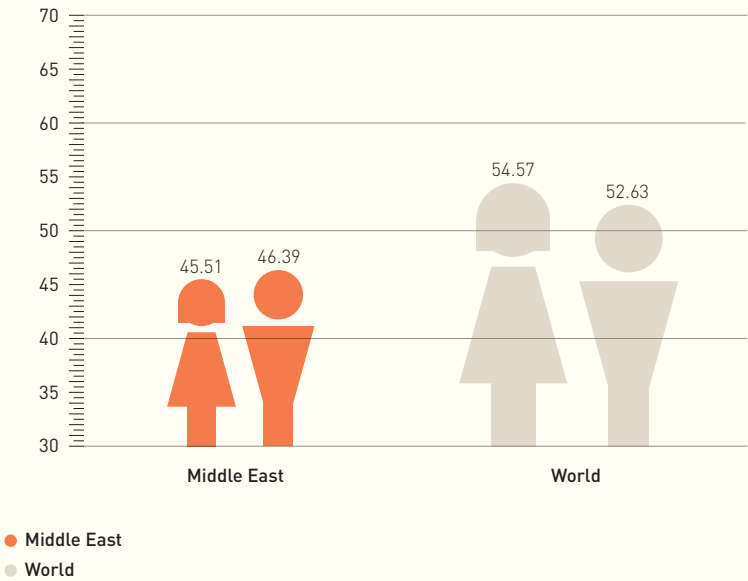
EF EPI Score Change from Last Year



GENDER GAP

The Middle East is the only region in which men have better English proficiency than women. There was a slight gender gap in favor of men last year and it has widened since, but it remains the narrowest gender gap in the world. Although average scores for both men and women in the Middle East improved, their English proficiency remains well below the global average.

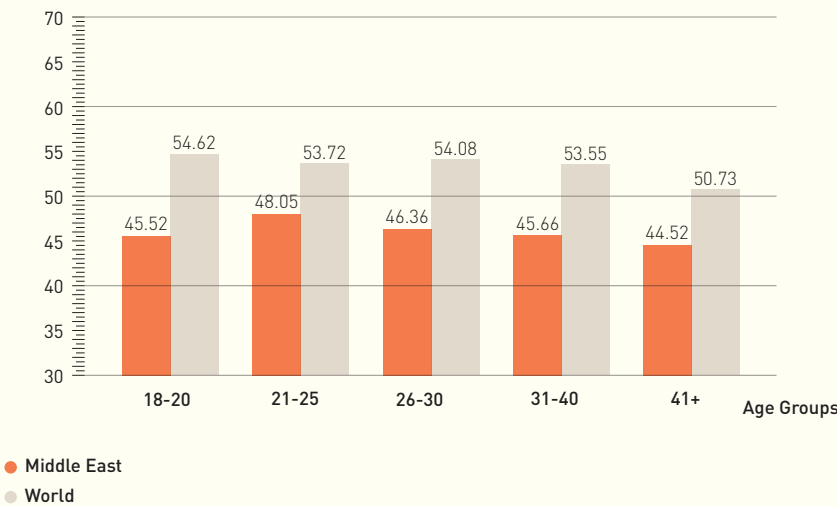
EF EPI Score



GENERATION GAP

Most age cohorts in the region saw their English improve this year, with the exception of the youngest cohort. The highest levels of English proficiency are now found among adults aged 21 to 25 in the Middle East, the same trend as in Latin America and Africa. All age groups fall well below global averages, but the cohort that is farthest behind is unfortunately also the largest: adults aged 18 to 20.

EF EPI Score





CONCLUSIONS

Learning to speak English can open the door to a better job, offer new opportunities for personal exploration and professional growth, and provide access to the world’s shared knowledge.

For these reasons and more, millions of parents invest in English tutoring, summer study abroad programs, and online English education programs for their children. This is also why millions of professionals make the same investments in their own English education, and governments include English on the core school curriculum.

English is unique in having such a wealth of educational resources outside the boundaries of formal schooling. Other skills—like web programming, accounting, numeracy, and literacy—are also extremely valuable, but they are already provided by public schools, or they are only required for certain types of jobs. English is unique in that it is in high demand for many professions, and yet most students do not master it adequately in school.

It’s not just individuals: companies, cities, regions, and countries stand to benefit from developing English proficiency. English facilitates international collaboration, investment, and mobility. In English-proficient communities, engineers have

access to the latest techniques, recruiters can draw from a global talent pool, and mergers take place more smoothly and comprehensively. And if that were not enough, English proficiency is also correlated with key development indicators, including metrics of income, equality, and productivity.

There is no one-size-fits-all solution to building a culture of English proficiency, but the regions and countries with the strongest English skills share certain time-tested strategies. In particular, they:

- officially recognize English as a key skill
- teach English to all children starting from primary school, using a communication-based methodology
- set minimum standards of English proficiency for students and test them to make sure no one falls behind
- choose not to dub movies and television shows, ensuring regular exposure to English from a young age across the broadest possible swath of the population

- fund short and long-term study abroad opportunities at the secondary and tertiary level
- allow universities to teach courses using English as the medium of instruction
- include English language requirements for all university majors and in all vocational schools
- include English in the training regimens for all new teachers
- re-train English teachers in communicative methods and teaching skills
- set up professional support networks for English teachers to share best practices
- provide high-quality English language instruction in job centers and unemployment reduction programs
- lead by example, with politicians, businesspeople, and celebrities coming out in support of English learning

Companies with strong cultures of English proficiency also tend to pursue certain strategies. They:

- make English the official corporate language
- foster a culture of internationalism and mobility
- offer partially or fully funded English training to employees, usually in collaboration with a third-party supplier
- train employees according to their roles using an appropriate role-specific English curriculum rather than general English training
- test the entire workforce to identify strategic weaknesses in English skills and focus on improving those first
- set minimum standards of English proficiency for different roles and test that those standards are met on time

- prioritize hiring strong English speakers
- compose diverse teams that include people from many nationalities
- require that all company documents be written in English
- encourage executives to lead by example, speaking about their personal experiences as English learners and English speakers

While the exact strategies vary from place to place, the benefits of improved English proficiency are clear. Communities with strong English skills are more competitive and open, and better able to take advantage of opportunities, knowledge, and talent around the world. There is no sign that globalization is slowing, and technology promises to make international communication ever simpler. Now more than ever, English gives people access to the world.

METHODOLOGY

The EF English Proficiency Index is increasingly cited as an authoritative source by journalists, educators, officials, and business leaders. EF is pleased to contribute to the ongoing global conversation about English language education. This eighth edition of the EF EPI is based on test data from more than 1,300,000 test takers around the world who took the EF Standard English Test (EF SET) in 2017.

THE EF STANDARD ENGLISH TEST (EF SET)

The EF SET is an online, adaptive English test of reading and listening skills. It is a standardized, objectively-scored test designed to classify test takers' language abilities into one of the six levels established by the Common European Framework of Reference (CEFR). The EF SET is available to any Internet user for free. For more information about the research and development of the EF SET, visit www.efset.org/research/.

EF EPI 2018 scores have been found to correlate strongly with TOEFL iBT 2017 scores ($r=0.82$) and IELTS Academic Test 2016 scores ($r=0.71$). These correlations show that, while these tests have different designs and test taker profiles, they reveal similar trends in national English proficiency.

TEST TAKERS

Although the sample of test takers for the EF EPI is biased toward respondents who are interested in pursuing language study and younger adults, the sample is balanced between male and female respondents and represents adult language learners from a broad range of ages.

- Female respondents comprised 60% of the overall sample.
- The median age of adult respondents was 26 years.
- 86% of all respondents were under the age of 35, and 99% under the age of 60.
- The median age of male and female respondents was the same.

Only cities, regions, and countries with a minimum of 400 test takers were included in the index, but in most cases the number of test takers was far greater. Cuba, Qatar, Mongolia, Angola, Cameroon, and Laos were included in the previous edition of the EF EPI but did not have enough test takers to be included in this edition.

SAMPLING BIASES

The test-taking population represented in this index is self-selected and not guaranteed to be representative. Only those who want to learn English or are 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. However, there is no incentive for test takers to inflate their scores artificially on these low-stakes tests by cheating, as the results are purely for personal use.

The EF SET is free and online, so anyone with an Internet connection can participate. Almost all of our test takers are working adults or young adults finishing their studies. People without Internet access would be automatically excluded, although the EF SET site is fully adaptive and 30% of test takers complete the exam from a mobile device.

In parts of the world where Internet usage is low, we would expect the impact of an online format to be strong. This sampling bias would tend to pull scores upward by excluding poorer and less educated people. Nevertheless, open-access online tests have proven effective in gathering very large amounts of data about a range of indicators, and we believe they provide valuable information about global English proficiency levels.

SCORE CALCULATION

To calculate an EF EPI score, we used the 100 point scale of the EF SET. Regional averages are weighted by population. Based on score, we assigned countries, regions, and cities to proficiency bands. This allows recognition of clusters with similar English skill levels and comparisons 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.
- The High, Moderate, and Low Proficiency bands correspond to CEFR level B1, with each band corresponding to a single EF course level.
- The Very Low Proficiency band corresponds to CEFR level A2.

OTHER DATA SOURCES

The EF EPI is created through a different process from the one used by public opinion research organizations such as Euromonitor and Gallup, or by the OECD in skills surveys such as PISA and PIAAC. Those studies select survey participants using age, gender, level of education, income, and other factors. Their survey panels tend to be small, with at most a few thousand participants in each

place. Because they have been composed using complex sampling methods, they are considered representative of the entire population. Unfortunately, no such survey of English skills has ever been performed at an international level.

Another source of data about English proficiency comes from national education systems. Many schools test the English skills of every high school student or university applicant using a standardized national assessment. The results may or may not be made public, but educators and government officials use the data to assess the efficacy of education reform and pinpoint areas for improvement. Unfortunately, those national assessments are not comparable to each other, and they are not administered to adults, so while they give a good indication of English proficiency among high school students in one part of the world, they cannot be used for international comparison, nor can they tell us much about adult English proficiency levels.

The EF EPI does not aim to compete with or contradict national test results, language polling data, or any other data set. Instead, these data sets complement each other. Some are granular but limited in scope to a single age group, country, region, or test taker profile. The EF EPI is broad, examining working-aged adults around the world using

a common assessment method. There is no other data set of comparable size and scope, and, despite its limitations, we, along with many policymakers, scholars, and analysts, believe it to be a valuable reference point in the global conversation about English language education.

RELATED EF EPI REPORTS

The EF EPI research series has two separate reports: this main EF EPI report, which is published annually and looks at adult English proficiency; and the EF EPI for Schools (EF EPI-s), which is published biannually and looks at English proficiency among secondary school and university students. This year, we are publishing the EF EPI eighth edition. The EF EPI-s second edition was published in 2017. All EF EPI reports are available for download at www.ef.com/epi.

EF EDUCATION FIRST

EF Education First (www.ef.com) is an international education company that focuses on language, academics, cultural exchange, and educational travel. Founded in 1965, EF's mission is "opening the world through education." With more than 500 schools and offices in more than 50 countries, EF is the Official Language Training Partner for the Tokyo 2020 Olympic and Paralympic Games. The EF English Proficiency Index is published by Signum International AG.

ABOUT EF EPI PROFICIENCY BANDS

The EF English Proficiency Index places the surveyed countries and territories into five proficiency bands, from Very High to Very Low. The bands make it easier to identify countries and regions with similar skill levels and to draw comparisons between and within regions.

In the chart below, we give examples of tasks that an individual could accomplish at each proficiency band. The selection of tasks is not meant to be exhaustive, but it is a useful reference for understanding how skills advance across the bands.

It is important to keep in mind that a proficiency band merely indicates the level of the “average” person. The EF EPI seeks to compare countries and territories, which necessitates overlooking individual strengths and weaknesses.

VERY HIGH PROFICIENCY	SAMPLE TASKS
SWEDEN NETHERLANDS SINGAPORE	<div>✓ Use nuanced and appropriate language in social situations</div> <div>✓ Read advanced texts with ease</div> <div>✓ Negotiate a contract with a native English speaker</div>
HIGH PROFICIENCY	
POLAND PHILIPPINES SWITZERLAND	<div>✓ Make a presentation at work</div> <div>✓ Understand TV shows</div> <div>✓ Read a newspaper</div>
MODERATE PROFICIENCY	
INDIA NIGERIA HONG KONG SAR	<div>✓ Participate in meetings in one’s area of expertise</div> <div>✓ Understand song lyrics</div> <div>✓ Write professional emails on familiar subjects</div>
LOW PROFICIENCY	
GEORGIA CHILE CHINA	<div>✓ Navigate an English-speaking country as a tourist</div> <div>✓ Engage in small talk with colleagues</div> <div>✓ Understand simple emails from colleagues</div>
VERY LOW PROFICIENCY	
IRAN MOROCCO TUNISIA	<div>✓ Introduce oneself simply (name, age, country of origin)</div> <div>✓ Understand simple signs</div> <div>✓ Give basic directions to a foreign visitor</div>

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 traveling in an area where the language is spoken. Can produce simple connected text on topics that 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 and regions in the EF EPI fall into bands corresponding to levels A2-B2.

EF EPI COUNTRY AND REGION SCORES

A look at changes in English skills over the past year:

The EF EPI score change is the difference between EF EPI seventh edition and eighth edition scores. Any change greater than two points—positive or negative—indicates a significant shift in English ability. The EF EPI seventh edition used test data from 2016, and the eighth from 2017.

	EF EPI SEVENTH EDITION	EF EPI EIGHTH EDITION	SCORE CHANGE
AFGHANISTAN	—	43.64	new
ALBANIA	—	51.49	new
ALGERIA	42.11	44.50	+2.39
ARGENTINA	56.51	57.58	+1.07
AUSTRIA	62.18	63.13	0.95
AZERBAIJAN	46.97	45.85	-1.12
BANGLADESH	50.96	48.72	-2.24
BELARUS	—	53.53	new
BELGIUM	61.58	63.52	+1.94
BOLIVIA	—	48.87	new
BRAZIL	51.92	50.93	-0.99
BULGARIA	57.34	57.95	+0.61
CAMBODIA	40.86	42.86	+2.00
CHILE	51.50	52.01	+0.51
CHINA	52.45	51.94	-0.51
COLOMBIA	49.97	48.90	-1.07
COSTA RICA	53.13	55.01	+1.88
CROATIA	—	60.16	new
CZECH REPUBLIC	57.87	59.99	+2.12
DENMARK	69.93	67.34	-2.59
DOMINICAN REPUBLIC	56.31	54.97	-1.34
ECUADOR	49.42	48.52	-0.90
EGYPT	46.51	48.76	+2.25
EL SALVADOR	45.70	47.42	+1.72
ETHIOPIA	—	50.79	new
FINLAND	65.83	65.86	+0.03
FRANCE	54.39	55.49	+1.10
GEORGIA	—	52.28	new
GERMANY	62.35	63.74	+1.39
GREECE	57.14	58.49	+1.35
GUATEMALA	49.52	50.63	+1.11
HONDURAS	—	47.80	new
HONG KONG SAR	55.81	56.38	+0.57
HUNGARY	58.61	59.51	+0.90
INDIA	56.12	57.13	+1.01
INDONESIA	52.15	51.58	-0.57
IRAN	46.60	48.29	+1.69
IRAQ	38.12	40.82	+2.70
ITALY	54.19	55.77	+1.58
JAPAN	52.34	51.80	-0.54
JORDAN	47.40	47.10	-0.30
KAZAKHSTAN	45.95	45.19	-0.76
KUWAIT	43.14	45.64	+2.50
LEBANON	—	55.79	new

	EF EPI SEVENTH EDITION	EF EPI EIGHTH EDITION	SCORE CHANGE
LIBYA	38.61	39.64	+1.03
LITHUANIA	57.08	57.81	+0.73
LUXEMBOURG	64.57	66.33	+1.76
MACAU SAR	51.87	52.57	+0.70
MALAYSIA	61.07	59.32	-1.75
MEXICO	51.57	49.76	-1.81
MOROCCO	47.91	48.10	+0.19
MYANMAR	—	44.23	new
NETHERLANDS	71.45	70.31	-1.14
NICARAGUA	—	47.26	new
NIGERIA	54.74	56.72	+1.98
NORWAY	67.77	68.38	+0.61
OMAN	44.48	45.56	+1.08
PAKISTAN	49.88	51.66	+1.78
PANAMA	50.68	49.98	-0.70
PERU	50.50	49.32	-1.18
PHILIPPINES	60.59	61.84	+1.25
POLAND	62.07	62.45	+0.38
PORTUGAL	58.76	60.02	+1.26
ROMANIA	59.13	60.31	+1.18
RUSSIA	52.19	52.96	+0.77
SAUDI ARABIA	43.98	43.65	-0.33
SENEGAL	—	53.50	new
SERBIA	59.37	60.04	+0.67
SINGAPORE	66.03	68.63	+2.60
SLOVAKIA	57.63	58.11	+0.48
SLOVENIA	64.97*	64.84	-0.13
SOUTH AFRICA	63.37	66.52	+3.15
SOUTH KOREA	55.32	56.27	+0.95
SPAIN	56.06	55.85	-0.21
SRI LANKA	47.84	49.39	+1.55
SWEDEN	70.40	70.72	+0.32
SWITZERLAND	60.95	61.77	+0.82
SYRIA	48.49	46.37	-2.12
TAIWAN	52.04	51.88	-0.16
THAILAND	49.78	48.54	-1.24
TUNISIA	49.01	47.85	-1.16
TURKEY	47.79	47.17	-0.62
UKRAINE	50.91	52.86	+1.95
UNITED ARAB EMIRATES	48.88	47.27	-1.61
URUGUAY	51.73	53.41	+1.68
UZBEKISTAN	—	42.53	new
VENEZUELA	45.71	46.61	+0.90
VIETNAM	53.43	53.12	-0.31

* This country or region did not appear in the EF EPI seventh edition, so this score comes from earlier EF EPI editions.

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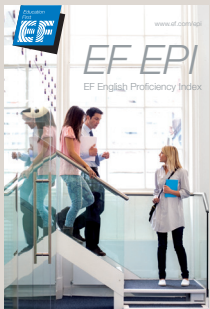
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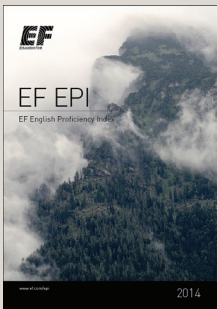
EF ENGLISH PROFICIENCY INDEX
1st Edition (2011)



EF ENGLISH PROFICIENCY INDEX
2nd Edition (2012)



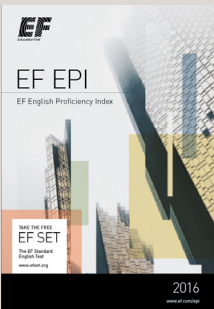
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3rd Edition (2013)



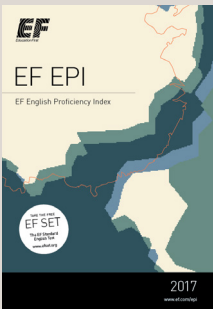
EF ENGLISH PROFICIENCY INDEX
4th Edition (2014)



EF ENGLISH PROFICIENCY INDEX
5th Edition (2015)



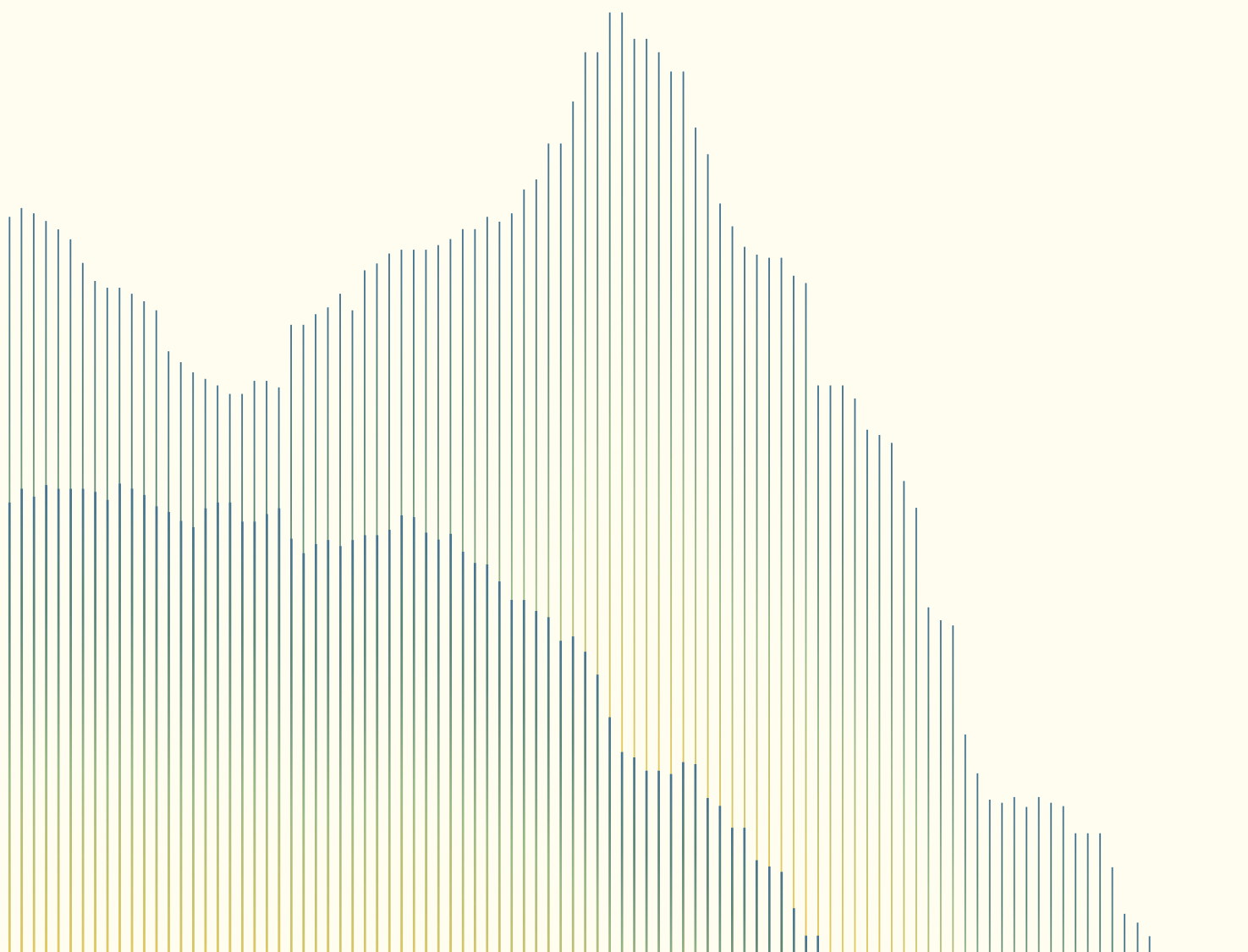
EF ENGLISH PROFICIENCY INDEX
6th Edition (2016)



EF ENGLISH PROFICIENCY INDEX
7th Edition (2017)



EF ENGLISH PROFICIENCY INDEX
8th Edition (2018)



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