



2019

EF EPI

EF English Proficiency Index

A Ranking of 100 Countries and Regions by English Skills

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What's new this year?

1. 2.3 million test takers, a 77% increase over last year
2. Eight new countries: Bahrain, Ivory Coast, Kenya, Kyrgyzstan, Maldives, Nepal, Paraguay, and Sudan
3. Indications that men are catching up to women in their English skills
4. A closer look at how English proficiency, international engagement, and global connectivity are related
5. A detailed look at students' English in the EF English Proficiency Index for Schools (EF EPI-s) companion report, available at www.ef.com/epi

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Executive Summary

In today's world, the English language demonstrates a strong network effect: the more people use it, the more useful it becomes.

More than a billion people speak English as a first or second language, and hundreds of millions more as a third or fourth. For expanding businesses, young graduates, scientists and researchers, and international tourists, English proficiency broadens horizons, lowers barriers, and speeds information exchange. The incentives to learn English have never been greater.

And yet, the demand for English proficiency far outpaces supply. Education systems founded in response to the first industrial revolution have yet to adapt to the demands of the fourth. A front-loaded culture of learning leaves adults little time to reskill. The growth of the gig economy asks people to transition quickly from declining to emerging opportunities.

We often see English proficiency presented as a competitive advantage, but our analysis suggests that it is equally significant for the connections it enables. These connections may help individuals find better jobs or start their own businesses, but they are also intrinsically valuable. Connection is one of the defining characteristics of the global citizen—curiosity, contact, and a sense of shared responsibility beyond one's own borders—and speaking English today is all about connection.

This report investigates how and where English proficiency is developing around the world. To create the ninth edition of the EF English Proficiency Index, we have analyzed the results of 2.3 million adults who took our English tests in 2018.

Our key findings are:

English proficiency is improving

The worldwide, population-weighted average English proficiency score remained stable, but 11 countries' scores improved significantly (meaning they gained more than two points), while only four experienced significant declines. There are more countries in the Very High Proficiency band this year than ever before.

English and innovation go hand in hand

English is the principal language of international collaboration, and as in previous editions of the report, we found correlations between English and various measures of investment in R&D. This finding resonates with recent research showing that companies with managers from many countries earn more revenue from innovation than their less diverse competitors. English-speaking teams are able to attract more diverse talent and access ideas from around the world. They are also more likely to collaborate internationally within their own organizations.

Countries with high English proficiency are more fair and more open

There is an increasingly clear relationship between a society's connectedness to the world and the level of social and political equality experienced by its citizens. Closed societies turn inwards and nurture rigid hierarchies. Open societies look outwards. They are flatter, fairer places. English, as a medium of international connectivity, correlates well with measures of both equality and engagement with the outside world.

Technology spreads English

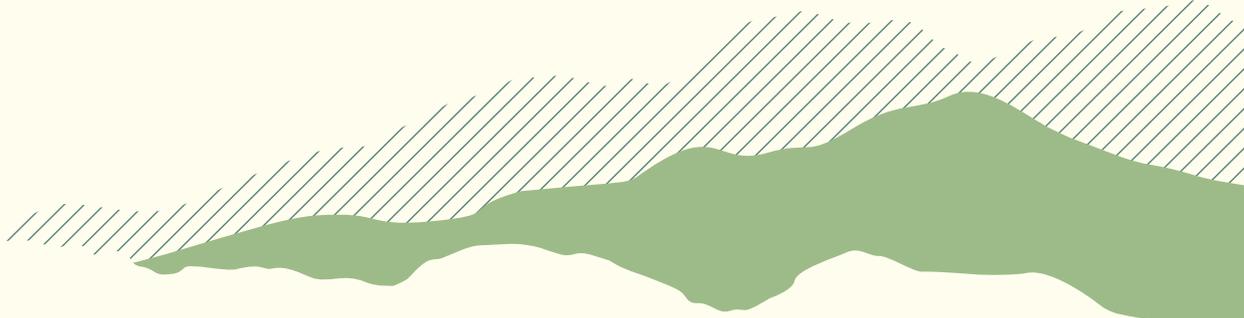
Technology-enabled distance education could one day allow anyone to learn English for a competitive price, wherever they are. While that potential has not yet been fully realized, we've found consistent correlations between English proficiency and measures of technology adoption, such as secure servers per capita, information and communication technology (ICT) exports, and broadband subscriptions. Access to English-language media speeds up many people's learning process too.

Adults in their late twenties speak the best English

For the first time, we find that adults aged 26-30 have the strongest English skills. This finding reflects the growing prominence of English instruction in university education around the world. It also suggests that on-the-job English practice and often some formal training are building English proficiency early in adults' careers. Adults aged 21-25 have the second-best average English proficiency score in this year's report.

Managers speak the most English

Worldwide, there is a gap of more than three points between the English proficiency scores of managers and those of their colleagues in executive and staff positions. Managers interact with their colleagues and clients overseas more regularly than junior staff, so they get more practice speaking English. Additionally, because English skills are at a premium, those who have them are often promoted to managerial positions. Executives, though, tend to be older, and many came of age in a business climate where English skills were less valued. Building English proficiency across all seniority levels would allow companies to share information more quickly across their organizations, and to access more diverse pools of talent.



Competitive industries use English

Every industry surveyed in this year's report has an English proficiency score clustered within a 10 point range, except for two: education and government. English proficiency in these less competitive sectors is far lower than in other industries. Of course, public servants' priority is serving their fellow citizens. But English is an essential skill for diplomats, teachers, government workers in countries with diverse linguistic landscapes, and any professional who wants to access global best practices, learn from international colleagues, and remain adaptable in a changing economy.

Non-English speakers cluster in specific job functions

There is a growing gap between job functions with high average English proficiency and those for which language skills seem to be lagging. Some of the results are stark: for example, if all the people working in administrative and clerical positions were counted in the Index as a single country, they would rank 94th out of 100 this year. Of course, not every job requires English. But most people will not stay in one job for the duration of a 40- or 50-year career, and English proficiency is critical for adaptability. The divide between those who speak English and those who do not, and the jobs that require English and those that do not, will only grow larger, rendering companies less flexible and individuals less mobile.

The gender gap is closing

Last year, women's average English level was higher than men's worldwide and in a majority of countries. That gap has closed significantly. Women outscored men by less than one point in Africa, Asia, and Europe. In Latin America, men's scores were higher than women's for the first time, albeit by a small margin. In the Middle East, men's average score continues to outpace women's by a significant margin, and the gender gap has widened since last year.

European English skills are polarized

English proficiency levels are rising in the European Union, with more EU countries than ever in the Very High Proficiency band. France's scores have improved for the past two years, but Spain and Italy still lag behind the rest of the EU. There is also a polarizing effect in the region, with most of the EU's neighbors not developing English proficiency at the same pace as member states.

Asia spans the spectrum

English proficiency in Asia declined slightly compared to last year, with over half the countries surveyed registering a drop in score. As was the case last year, Asia is the region with the widest range of proficiency levels—an unsurprising finding, given its size. China has consolidated its progress over the past decade, moving from low to moderate proficiency for the first time.

Latin America is turning around

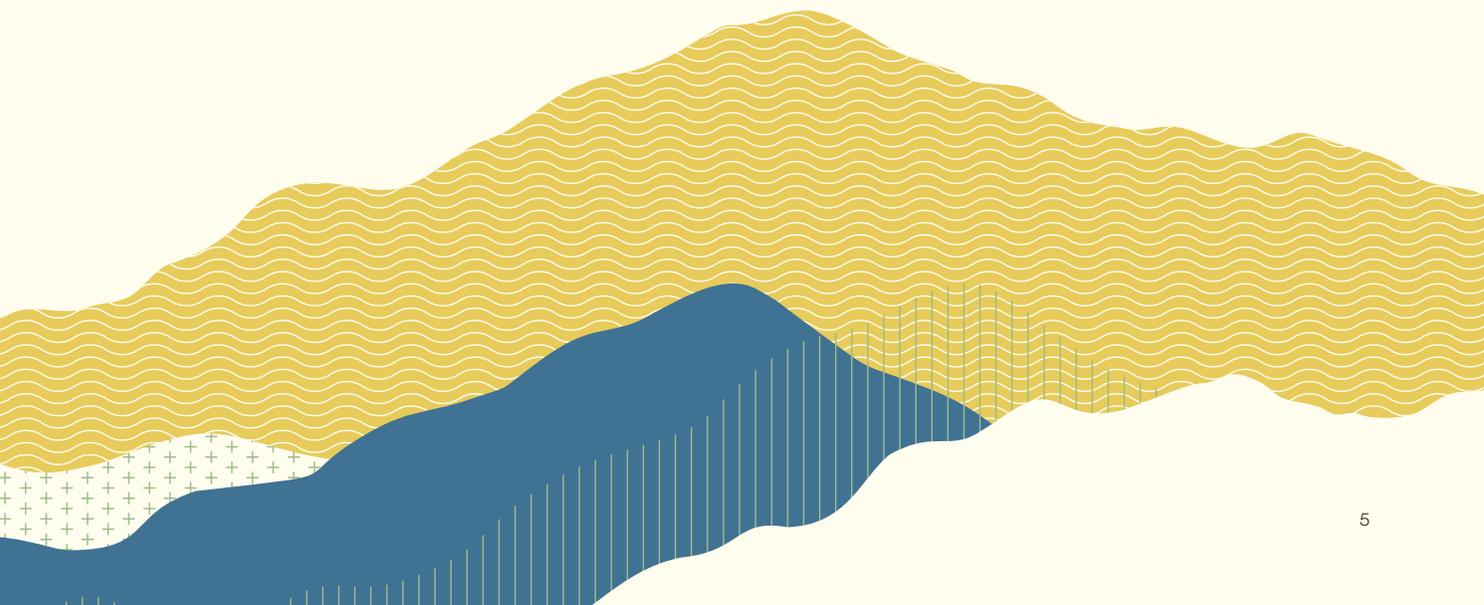
Twelve of the 18 countries surveyed in Latin America this year improved their English proficiency between 2017 and 2018, many of them significantly. The population-weighted regional average did not change, however, because the region's two most populous countries, Mexico and Brazil, experienced slight declines. Other Latin American countries, many of which have invested heavily in teacher training in recent years, are at last seeing real improvement.

Africa skews high and low

As in previous years, a few African countries performed well while the rest performed poorly, and the gap between higher and lower proficiency countries is wider than ever. The overall average for Africa dropped significantly, primarily due to score changes in South Africa and Ethiopia—both countries with large populations—and to the inclusion of Sudan and Cameroon, which were not in the Index last year, and both fall in the Very Low Proficiency band.

The Middle East falls further behind

English proficiency in the Middle East remains the lowest in the world by a wide margin. The regional average fell slightly compared to last year's report. Government efforts to improve English proficiency in the Middle East are not yet delivering results, but the region may be poised for a change.



EF EPI 2019

Ranking of Countries and Regions

Proficiency Bands

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

Very High Proficiency

01	Netherlands	70.27
02	Sweden	68.74
03	Norway	67.93
04	Denmark	67.87
05	Singapore	66.82
06	South Africa	65.38
07	Finland	65.34
08	Austria	64.11
09	Luxembourg	64.03
10	Germany	63.77
11	Poland	63.76
12	Portugal	63.14
13	Belgium	63.09
14	Croatia	63.07

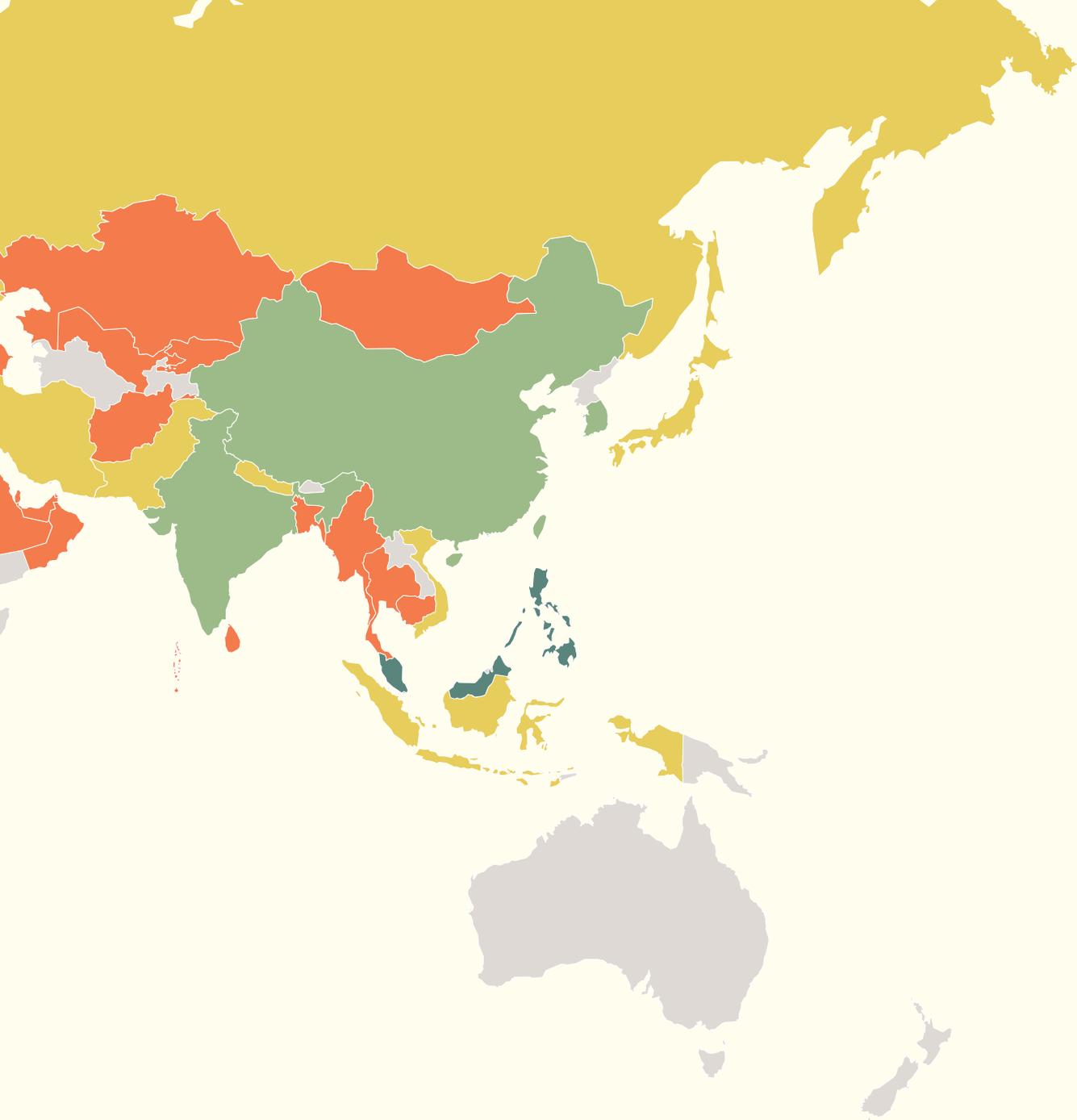
High Proficiency

15	Hungary	61.86
16	Romania	61.36
17	Serbia	61.30
18	Kenya	60.51
19	Switzerland	60.23
20	Philippines	60.14
21	Lithuania	60.11
22	Greece	59.87
23	Czech Republic	59.30
24	Bulgaria	58.97
25	Slovakia	58.82
26	Malaysia	58.55
27	Argentina	58.38
28	Estonia	58.29
29	Nigeria	58.26

Moderate Proficiency

30	Costa Rica	57.38
31	France	57.25
32	Latvia	56.85
33	Hong Kong, China	55.63
34	India	55.49
35	Spain	55.46
36	Italy	55.31
37	South Korea	55.04
38	Taiwan, China	54.18

39	Uruguay	54.08
40	China	53.44
41	Macau, China	53.34
42	Chile	52.89
43	Cuba	52.70
44	Dominican Republic	52.58
45	Paraguay	52.51
46	Guatemala	52.50



Low Proficiency

47	Belarus	52.39
48	Russia	52.14
49	Ukraine	52.13
50	Albania	51.99
51	Bolivia	51.64
52	Vietnam	51.57
53	Japan	51.51
54	Pakistan	51.41
55	Bahrain	50.92
56	Georgia	50.62
57	Honduras	50.53
58	Peru	50.22

59	Brazil	50.10
60	El Salvador	50.09
61	Indonesia	50.06
62	Nicaragua	49.89
63	Ethiopia	49.64
64	Panama	49.60
65	Tunisia	49.04
66	Nepal	49.00
67	Mexico	48.99
68	Colombia	48.75
69	Iran	48.69

Very Low Proficiency

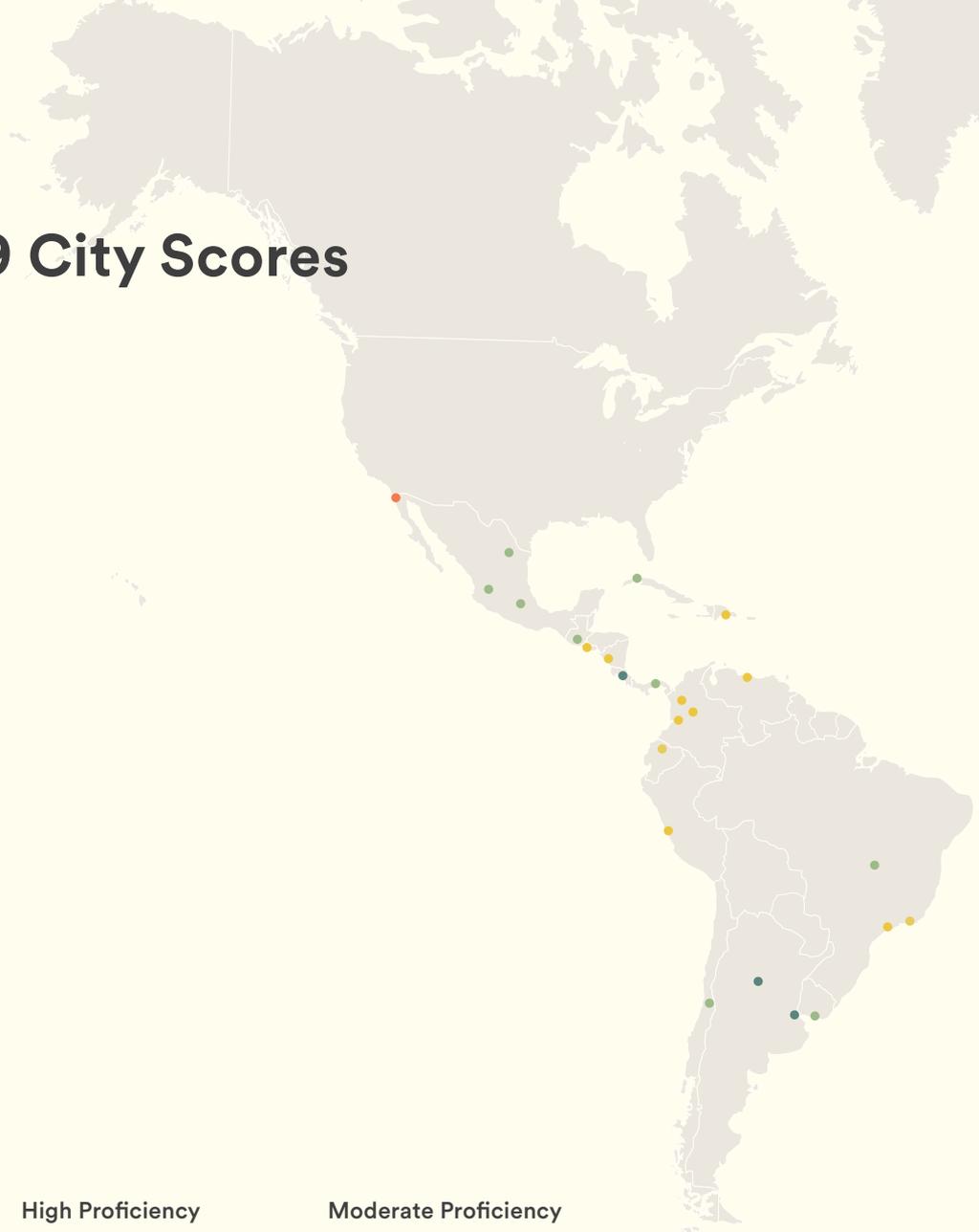
70	U.A.E.	48.19
71	Bangladesh	48.11
72	Maldives	48.02
73	Venezuela	47.81
74	Thailand	47.61
75	Jordan	47.21
76	Morocco	47.19
77	Egypt	47.11
78	Sri Lanka	47.10
79	Turkey	46.81
80	Qatar	46.79
81	Ecuador	46.57
82	Syria	46.36
83	Cameroon	46.28
84	Kuwait	46.22
85	Azerbaijan	46.13

86	Myanmar	46.00
87	Sudan	45.94
88	Mongolia	45.56
89	Afghanistan	45.36
90	Algeria	45.28
91	Angola	44.54
92	Oman	44.39
93	Kazakhstan	43.83
94	Cambodia	43.78
95	Uzbekistan	43.18
96	Ivory Coast	42.41
97	Iraq	42.39
98	Saudi Arabia	41.60
99	Kyrgyzstan	41.51
100	Libya	40.87

EF EPI 2019 City Scores

Proficiency Bands

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



Very High Proficiency

Amsterdam	71.35
Stockholm	69.24
Copenhagen	68.52
Helsinki	66.21
Oslo	65.89
Vienna	65.63
Berlin	65.51
Mumbai	65.38
Hamburg	64.72
Warsaw	64.68
Lisbon	64.50
Bucharest	64.45
Budapest	64.27
Zagreb	64.14
Davao City	63.85
Manila	63.69
Porto	63.65
Brussels	63.56
Kuala Lumpur	63.42
New Delhi	62.66

High Proficiency

Nairobi	61.94
Bratislava	61.88
Belgrade	61.42
Prague	61.29
Buenos Aires	60.87
Paris	60.28
San Jose	59.32
Sofia	59.29
Hyderabad	58.96
Cordoba (AR)	58.90
Lagos	58.47
Lyon	58.22
Barcelona	57.97

Moderate Proficiency

Madrid	57.35
Taipei	57.33
Seoul	57.14
Milan	57.12
Shanghai	56.64
Rome	56.28
Havana	55.75
Beijing	55.68
Montevideo	55.59
Saint Petersburg	54.94
Mexico City	54.80
Santiago	54.79
Monterrey	54.20

Guadalajara	53.93
Moscow	53.86
Hanoi	53.68
Minsk	53.58
Guatemala City	53.51
Kiev	53.51
Ho Chi Minh City	53.07
Dubai	52.84
Chengdu	52.69
Jakarta	52.58
Tokyo	52.58
Panama City	52.54
Brasilia	52.50



Low Proficiency

Guangzhou	52.42
Rio de Janeiro	52.39
Tirana	52.32
Shenzhen	52.32
Bandung	52.32
Surabaya	52.31
Santo Domingo	52.09
Lima	51.86
Sao Paulo	51.44
Medellin	51.35
Tbilisi	51.24
Tehran	51.23
Quito	51.13
San Salvador	51.01
Bangkok	50.70
Tunis	50.60
Cali	50.53
Managua	49.97
Bogota	49.80
Caracas	49.44
Cairo	49.27
Ankara	49.15
Casablanca	49.13
Dhaka	48.67
Istanbul	48.65

Very Low Proficiency

Khartoum	48.39
Algiers	48.33
Amman	48.32
Yangon	47.49
Tijuana	47.31
Nur-Sultan	46.48
Doha	46.38
Almaty	45.41
Baku	45.40
Baghdad	45.06
Kabul	45.02
Damascus	45.02
Bishkek	43.73
Jeddah	42.95
Riyadh	42.90
Tashkent	42.52

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?

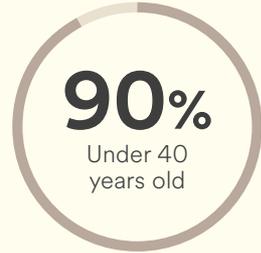
2.3M

Total Test Takers



59%

Female



41%

Male

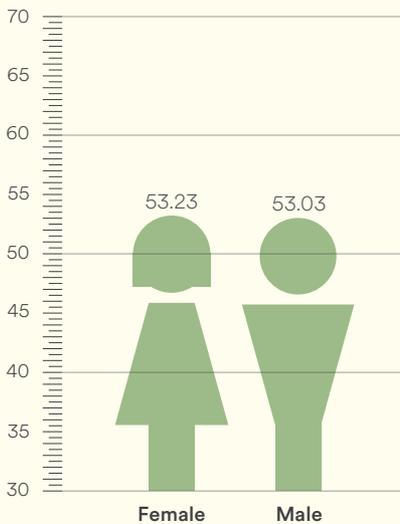
23 Years old

Median Age

How do gender and age affect English proficiency?

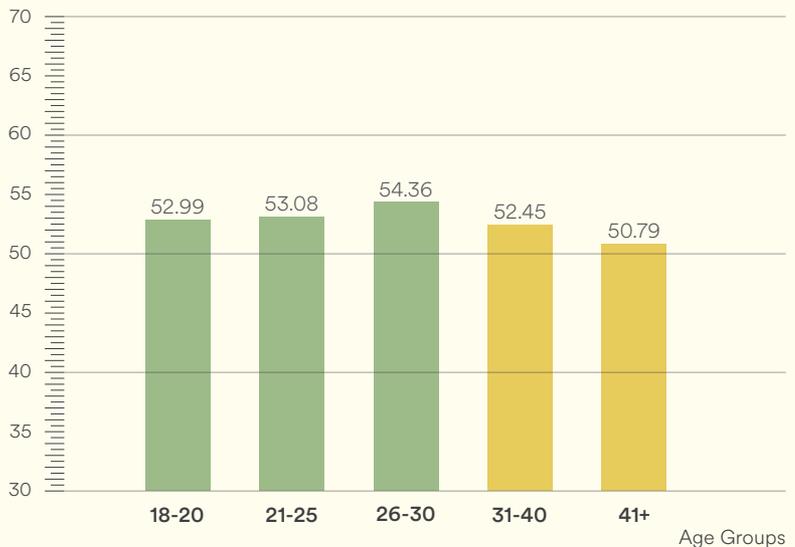
Global Gender Gap

EF EPI Score



Global Generation Gap

EF EPI Score



EF EPI 2019 regional trends

	Europe	Asia	Africa	Latin America	Middle East
Highest Score	Netherlands 70.27	Singapore 66.82	South Africa 65.38	Argentina 58.38	Bahrain 50.92
Lowest Score	Azerbaijan 46.13	Kyrgyzstan 41.51	Libya 40.87	Ecuador 46.57	Saudi Arabia 41.60
Most Improved	Portugal +3.12	Taiwan, China +2.30	Cameroon +3.83	Bolivia +2.77	Iraq +1.57
Largest Decline	Luxembourg -2.30	Sri Lanka -2.29	Egypt -1.65	Dominican Republic -2.39	Saudi Arabia -2.05

EF EPI 2019 regional scores

EF EPI Regional Averages

EF EPI Score



Proficiency Bands ● Very High ● High ● Moderate ● Low ● Very Low

English and Innovation

Propelled by digital tools, the 21st century has seen an unprecedented exchange of information and ideas across borders. As global English skills improve and the costs of travel and communication decline, that exchange will only speed up.

Today, scientists and engineers simply cannot afford to miss out on global innovation because of language barriers, and it is not just them who need to access new ideas. In every field, professionals need to stay abreast of international best practices. For companies, too, a culture of English proficiency makes it possible to tap pools of talent and expertise that, just a few years ago, would have been out of reach.

Reflecting these trends, we have found a high correlation between English proficiency and the Global Talent Competitiveness Index (Graph A), a report that assesses a country's ability to attract, develop, and retain skilled workers.

Meetings of minds

Tools for collaboration are only getting better. Online, work-based social media and collaboration tools are on the rise, enabling more frequent and more casual communication between employees in different locations. Back in the physical world, international conferences and summits are now the norm in a wide range of fields, allowing colleagues and

competitors to network, learn about each other's research, and develop new ideas. In 2017, the Union of International Associations cataloged 10,786 meetings and conventions in 166 countries around the world. There were more than 3,700 TEDx conferences in 2018 alone.

Exciting as this collaborative ecosystem can be, even the best collaboration platform cannot function when employees do not speak the same language. And those meetings and conferences take place almost entirely in English. From teachers to CEOs, those who speak English have broader contact with their peers and better access to the best minds and ideas in their fields.

See and be seen

Cutting-edge scientific research today proceeds through complex, collaborative projects. The days of individual labs working on their own is coming to an end, and leveraging the resources of teams in different labs is often a requirement for funding. In 2017, 60% of articles in the Nature Index were international collaborations, a higher proportion than ever before. It is not surprising, then, to find a strong correlation between a country's English proficiency and the number of scientific and technical journal articles per capita (Graph B) as well as its investment in R&D, in terms of both capital and human resources.

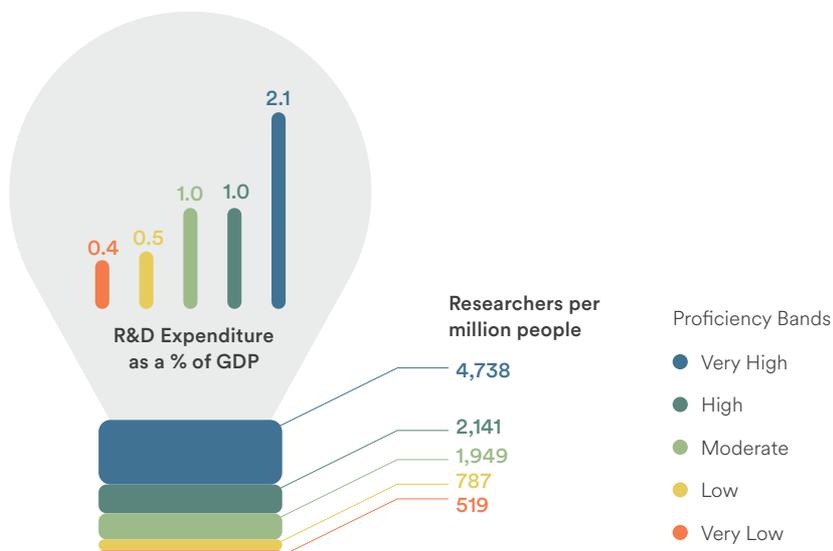
In terms of the number of papers published, China's scientific production is progressively outstripping that of the United States. But in the past, the impact of the country's research was hampered by a lack of international collaboration. Papers published in English are much likelier to be cited than those published in another language. In November 2018, The Economist reported that bonuses for Chinese scientists who get a paper published in Nature were as high as 165,000 USD.

Where new ideas come from

Diversity has an impact on innovation—an impact that researchers are only beginning to fully understand. A growing body of academic research shows that diverse groups make better decisions, rely more on facts than opinions, and demonstrate less cognitive bias than homogenous groups. Cultural diversity, in particular, is correlated with innovation. Research by McKinsey & Company in 2017 found that companies with executive teams in the top quartile for cultural diversity are 33% more likely to have industry-leading profitability. And English proficiency enables diversity: of the top 100 companies in the Thomson Reuters IX Global Diversity and Inclusion Index 2018, only seven are headquartered in countries with low English proficiency.

Bright Ideas

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



Source: World Bank, 2016

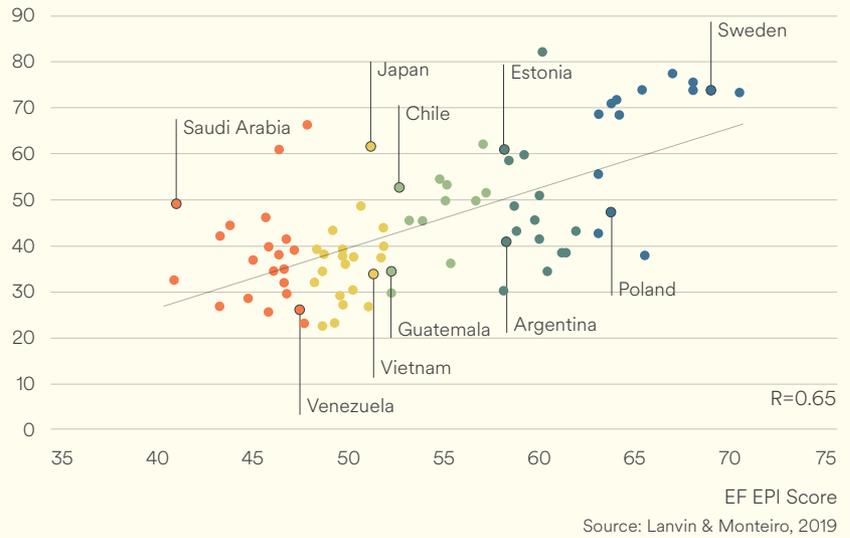
Proficiency Bands

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

GRAPH A

English and Talent

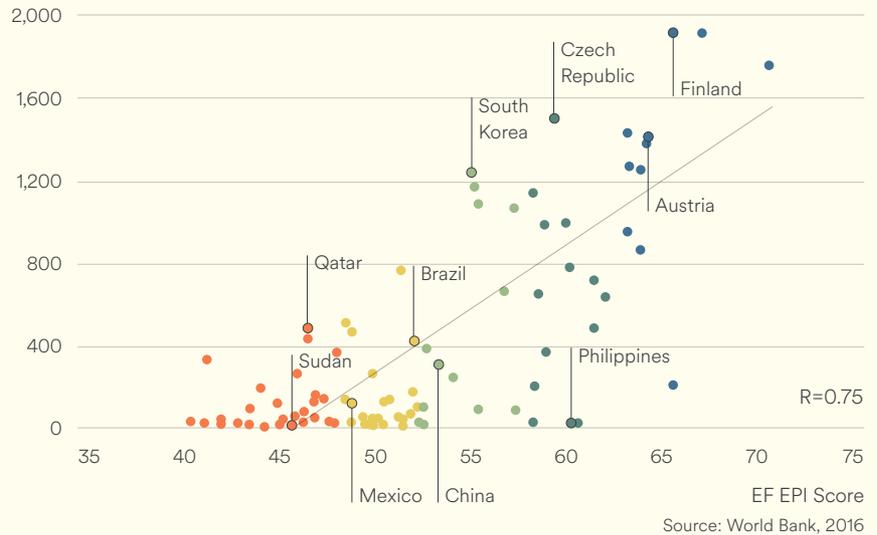
Global Talent Competitiveness Index



GRAPH B

English and Scholarship

Scientific and Technical Journal Articles (per million people)



English and Work

Modern workplaces are evolving rapidly, driven by digital technology, the growth of the gig economy, and the rising value of social capital in individual consumption patterns. It is no longer enough that companies compete in the global marketplace. They are increasingly expected to behave ethically, actively engage their customers, and weed out bad actors before they can tarnish the brand. Indeed, the 2019 Edelman Trust Barometer reported that 56% of people worldwide trust businesses “to do what is right,” versus just 47% who trust their governments.

These rapid changes have caused a boom in employee education. Sloan Management Review and Deloitte’s 2018 Digital Business Global Executive Study and Research Project, which surveyed 4,300 executives and professionals from around the world, found that 90% think they need to update their skills at least annually, and 44% see development as a year-round exercise.

At the same time, the growing proportion of workers in atypical work arrangements, such as contract, freelance, part-time, and gig work, means that more and more people are left out of existing training models. Managing external talent segments and optimizing the workforce ecosystem will require new ways of thinking about training and development. Autonomous learning has the potential to address some of these issues, with employee-managed individual training accounts that receive contributions from both employers and government, and externally inspected micro-credentials to guarantee skill portability.

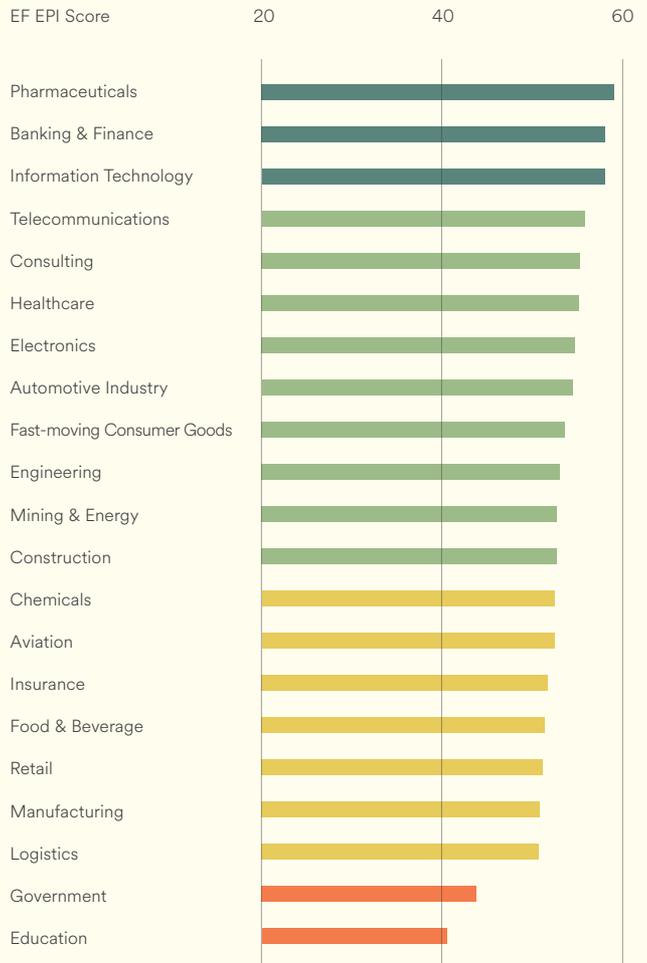
Current workforce English proficiency as measured by this data should not be interpreted as the target English level for particular industries or job functions. Rather, it offers a snapshot of current average English skills in the global workforce. Many working professionals do not have a sufficient mastery of English to be fully productive in their current roles or to evolve into new ones. Those charged with employee training and development must take a strategic view of the English proficiency requirements in each function and for each individual within their organization.

Public vs. Private

English proficiency across all competitive industries is remarkably homogenous, with fewer than 10 points separating logistics, at the bottom of the range, from pharmaceuticals at the top. Public sector workers and educators lag far behind their peers in the private sector.

At first glance, this may seem like an intuitive result. After all, if any sector is limited by national boundaries, it’s the public sector. However, many government and education roles—including English teaching, diplomacy, research, and international peacekeeping missions—directly require English proficiency, and, for any role, speaking English gives professionals access to a broader range of ideas, practices, and people. In addition, having English skills on par with the private sector would allow public employees to pursue other career opportunities in reaction to changes in the economy or in their personal lives. A career for life is an artifact of the past. The enormous English proficiency gap between public and private sector employees should be a major concern for the governments with workforces that are ill-equipped to work for anyone else.

EF EPI by Industry



Left out of the team

Businesses today operate with high levels of collaboration, with flat, non-hierarchical structures and dedicated tools for internal networking. These innovations aim to make companies more agile, more innovative, and fairer. But our data shows that some parts of organizations have not been invited to the party. People in clerical, distribution, accounting, and customer service roles have, on average, much lower levels of English proficiency than their coworkers. This gap prevents them from being productive members of multinational teams, and it limits their career prospects. Recent research by the McKinsey Global Institute finds that nearly two-thirds of jobs include a substantial share of tasks that could be automated, based on current technology. When the job market shrinks, people who lose their jobs need opportunities to pivot to new positions. If their English skills are lacking, that transition will prove challenging.

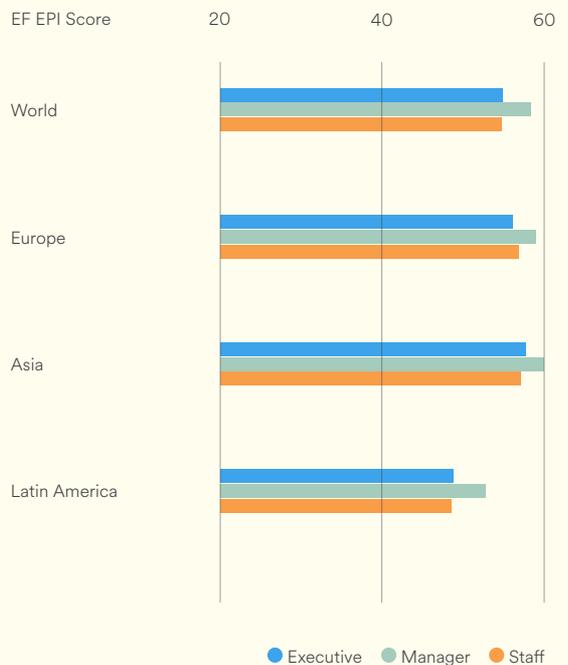
Getting a promotion

Managers speak English better than executives and staff in every region with sufficient data to report. The skill gap is particularly wide in Latin America, which has lower average adult English proficiency. This finding suggests that companies in Latin America may have a sort of “English glass ceiling” operating on the transition from junior to managerial positions, in which staff are not promoted unless they speak English. The same rule does not appear to apply to executives, where selection is stiffer and other leadership qualities receive more attention. Executives are almost always older than the average employee, and our data shows that people over 40 have significantly less mastery of English on average. There may not always be qualified candidates for executive positions who also have good English skills.

EF EPI by Job Function



EF EPI by Seniority



English and the Economy

A lingua franca lowers transaction costs across borders; the more widely English is adopted, the more savings it generates. Although there is evidence that the pace of globalization is slowing, international trade is a significant portion of the world economy, with exports making up around 20% of the world's economic output. We consistently find a correlation between ease of doing business and a country's English proficiency, as well as speaking English and a range of logistics-related indicators.

Human capital development

For economies around the world, higher English proficiency correlates with higher gross domestic product, higher net income, and higher productivity (Graph C). To be clear, there's no evidence that English proficiency drives this economic success. But the complex relationship between language skills and economic growth—with greater wealth facilitating more English training, and English skills helping economies stay competitive—highlights the role that English can play in broader schemes for economic growth.

In developing countries, the transition to a knowledge-based economy requires building both infrastructure and a skilled workforce that is able to offer services internationally. In the past 30 years, many emerging economies closed the gap with richer countries thanks to manufacturing. As those opportunities dry up, they will need to focus more on education, for both children and adults, if they are to tap into international trading opportunities and develop service-sector industries. We find a correlation between a country's level of human capital development and its English proficiency (Graph D).

Services from afar

Services represent a growing share of global economic activity, but they are more difficult to export than goods. iPhones can be shipped anywhere; accountants cannot. There is a correlation between English proficiency and a country's service exports as well as the value added per worker in services. As the complexity and sophistication of economic exchange increases, so does the demand for linguistic competencies. A growing number of MBA programs demand fluency in English and a second, sometimes third, language.

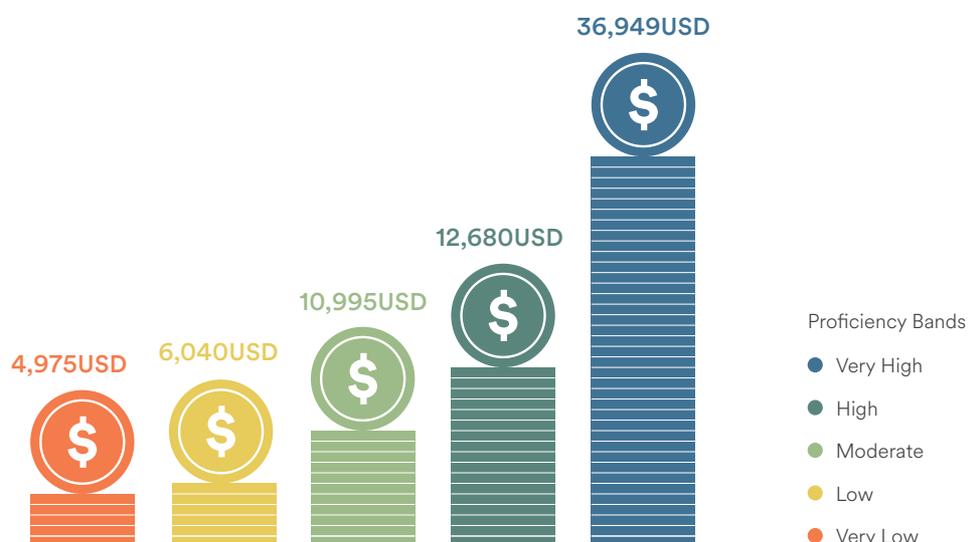
Trust me, I speak English

Speaking the same language as a trading partner is not only a technical necessity, but also a basis for building trust. That trust is reflected in the data: economist Pankaj Ghemawat estimates that countries that share a language trade 42% more with each other than they would if they did not share a language. Although technology and AI will increasingly assist in routine translation, we are a long way from a language engine that can understand the cultural nuances humans routinely navigate in everyday communication.

Far from the English-only business environment decried by linguistic protectionists, today's multinational firms engage with a diverse linguistic landscape. True, there is a drive to use English as the fastest and cheapest mode of communication between speakers of different languages, but investment in other languages is high, too. According to national agencies for language promotion, at least 150 million people worldwide are currently studying French, Spanish, or Chinese as foreign languages. There is enormous trust to be gained by learning the native languages of your partners.

English pays off

We have found a consistently positive correlation between English proficiency and a range of indicators of human and economic development, including adjusted net income per capita.



Source: World Bank, 2017

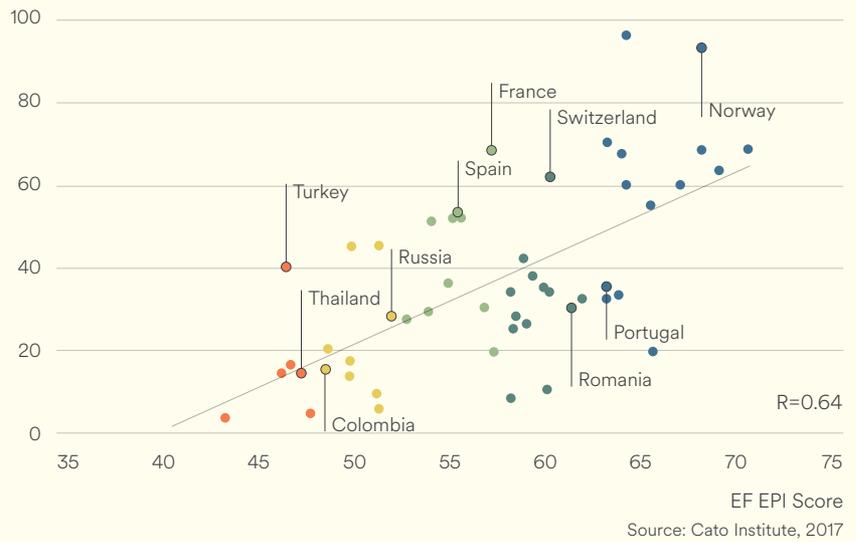
Proficiency Bands

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

GRAPH C

English and Productivity

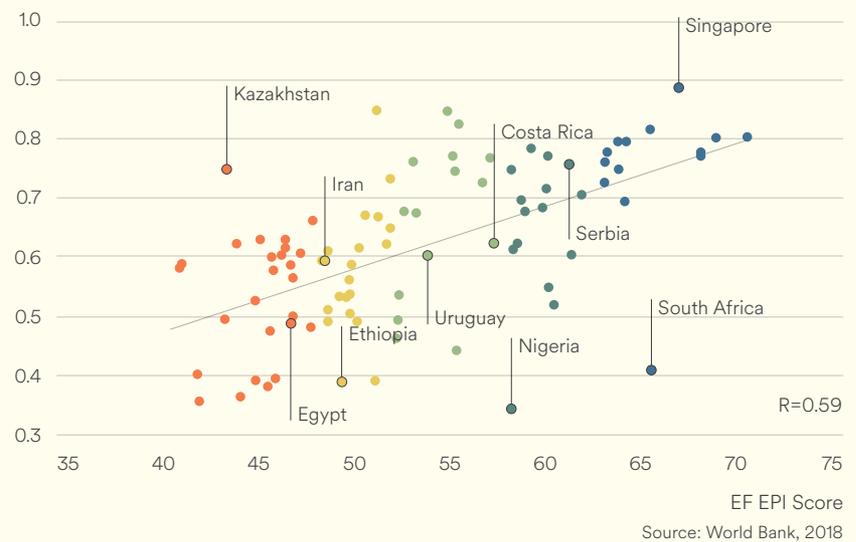
Labor Productivity (USD, per hour worked)



GRAPH D

English and Human Capital

Human Capital Development Index



English and Society

Adult English proficiency is a strong proxy for the openness of a society. Where adults have learned to speak English, they are also, on the whole, more internationally mobile, more politically engaged, and more progressive in their outlook on gender roles. That is not to say that there is a neat cause and effect relationship. 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.

Balance of power

Adult English proficiency correlates 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. The PDI 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 subordinates 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.

Looking out instead of in

Although English does not undermine hierarchy directly, it may contribute to broadening a society's horizons. Demand for English learning has never been higher, and there is no point learning English if one does not intend to communicate and travel across borders. With that movement comes freedom to observe how the rest of the world operates. We find a very strong correlation between a country's global connectedness and its level of English, as well as robust correlations between English and indices of democracy, civil liberties, and political rights. After contact with the outside world, people often raise questions about their own societies, engage more deeply with global issues, and, in many cases, push for change. There is a very strong correlation between English proficiency and the Good Country Index (Graph E), a composite measure of how much a country currently contributes to humanity as a whole, setting aside its history.

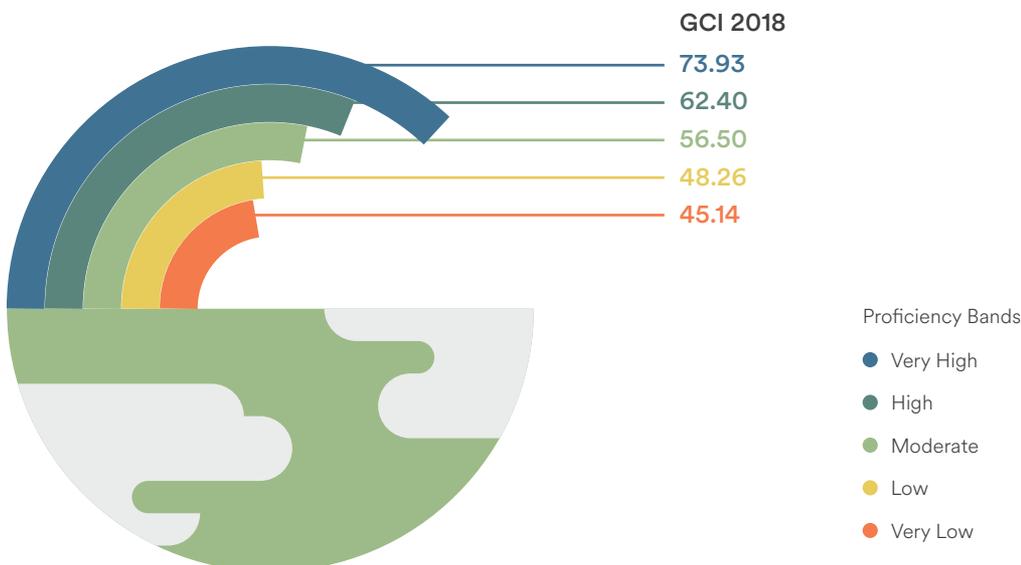
Half the sky

Women form an essential part of a skilled 21st century workforce. In the majority of countries, both rich and developing, women are more educated than men. Yet their job opportunities are limited by wage gaps, structural imbalances, and cultural expectations that they will do more than their share of unpaid work in the home. All countries have much to gain by systematically addressing these imbalances.

In societies with more progressive gender roles, people speak better English. 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 with this index (Graph F). Again, there is no simple cause and effect relationship here. Speaking English does not directly 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.

Talk to the world

People who speak English are able to engage with the world beyond their own borders. There's a positive correlation between a country's average English proficiency and its global connectedness.



Source: Global Connectedness Index, 2018

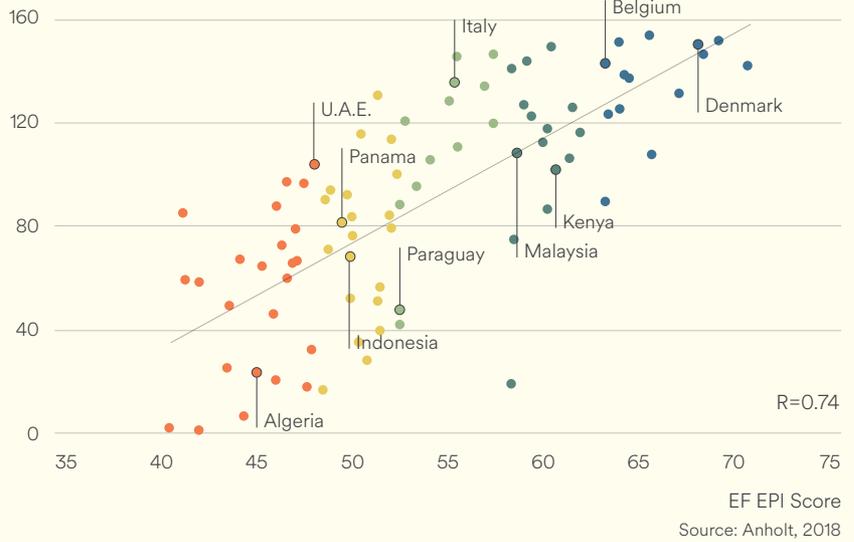
Proficiency Bands

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

GRAPH E

English and International Engagement

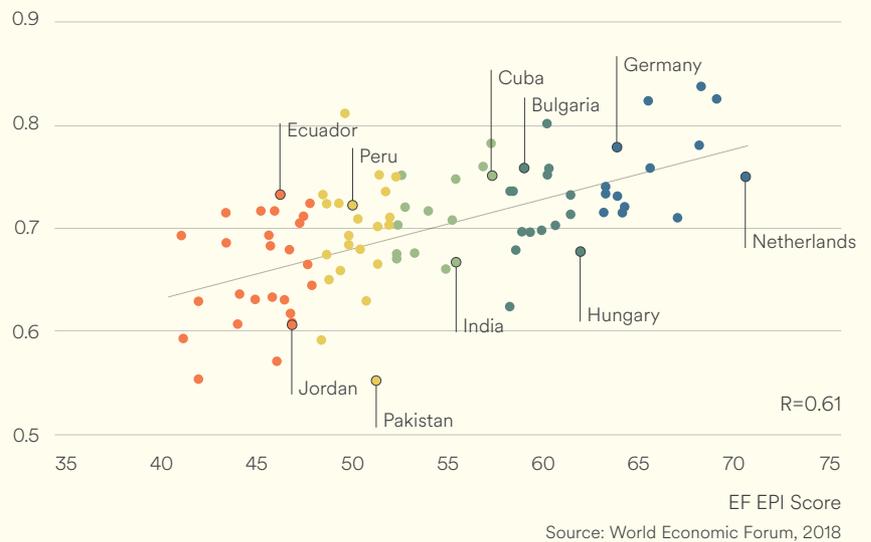
Good Country Index (inverse)



GRAPH F

English and Gender Equality

Global Gender Gap Index



EUROPE

EF EPI Rankings

01 Netherlands	70.27	14 Croatia	63.07	31 France	57.25
02 Sweden	68.74	15 Hungary	61.86	32 Latvia	56.85
03 Norway	67.93	16 Romania	61.36	35 Spain	55.46
04 Denmark	67.87	17 Serbia	61.30	36 Italy	55.31
07 Finland	65.34	19 Switzerland	60.23	47 Belarus	52.39
08 Austria	64.11	21 Lithuania	60.11	48 Russia	52.14
09 Luxembourg	64.03	22 Greece	59.87	49 Ukraine	52.13
10 Germany	63.77	23 Czech Republic	59.30	50 Albania	51.99
11 Poland	63.76	24 Bulgaria	58.97	56 Georgia	50.62
12 Portugal	63.14	25 Slovakia	58.82	79 Turkey	46.81
13 Belgium	63.09	28 Estonia	58.29	85 Azerbaijan	46.13

Proficiency Bands ● Very High ● High ● Moderate ● Low ● Very Low



All together now

What began as an idealistic forum to promote peace has evolved into the most tightly integrated political and economic union in the world, enabled by a shared language.

Europe has the highest English proficiency of any region by a wide margin—even more so if only EU and Schengen Area countries are included in the regional average. This success reflects decades of effort by national education ministries and the EU itself to promote multilingualism. Fast and easy communication strengthens ties between Europeans, as does student exchange, travel, and transnational work. Even as growing nationalism challenges the EU project, the opposing forces of European cohesion appear robust.

On the same page

The countries with the highest English proficiency in Europe are clustered in Scandinavia, but the number of very high proficiency countries across the region has grown every year since 2017. School systems in these countries employ several key strategies, including an early focus on communication skills, daily exposure to English both in and outside the classroom, and career-specific language instruction in the final years of study, whether that is vocational school or university. The EU's robust data-collection and information-sharing network has been helpful in spreading best practices between member countries.

Corporate and government-funded adult training programs are common across Europe as well, but these English courses are often too short and too low-intensity to be effective. European countries would be able to raise English proficiency even further, especially among older demographics, by instituting adult training that is certified externally and normalized against credentialing systems to ensure its quality and portability between jobs.

Less agile members

Of the Eurozone's four largest economies, only Germany speaks English well. France, Spain, and Italy lag behind nearly every other member state—a finding that has been consistent across previous editions of the EF EPI. Of the three, only France has made modest gains over the past two years. According to a recent government report, at the age of 15, only a quarter of French children are able to string together a few sentences in “more or less correct” English. Another round of education reforms was announced this year.

Our data indicates that English proficiency in Spain has been declining since 2014. According to the latest polling by CIS, a Spanish public research institute, 60% of adults say they speak no English at all. A vast project to convert public primary and secondary schools into bilingual schools, in which up to 30% of the curriculum is taught in English, has so far had no measurable effect on adult English proficiency.

The gap in English proficiency is particularly concerning because both Italy and Spain suffer from high rates of unemployment, particularly among the young, and could desperately use the new economic opportunities that faster, smoother communications with the rest of Europe would bring.

East not meeting west

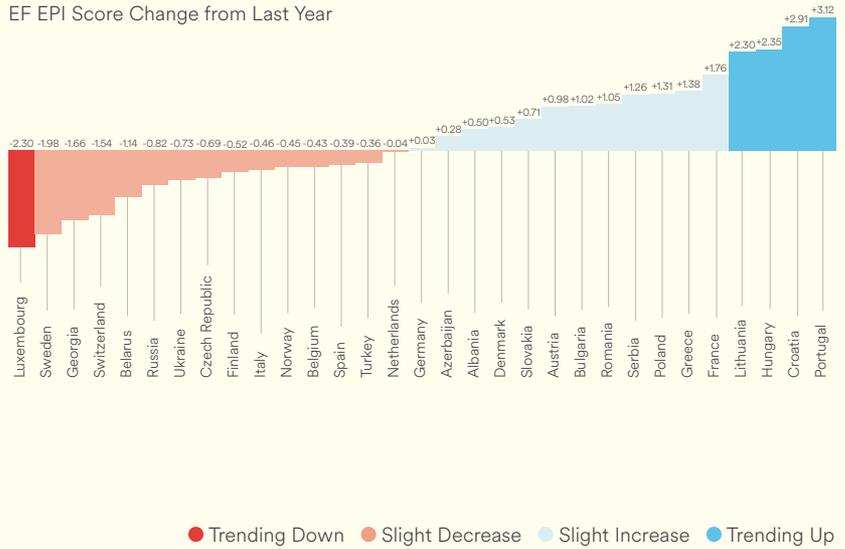
English skills continue to lag in countries on the margins of the European continent. English proficiency in Turkey has declined in the past five years as the country's dreams of joining the EU have faded and other priorities have emerged. English instruction in schools focuses on grammar and translation rather than practical communication skills, with much of the content delivered in Turkish. Hundreds of elite high schools with a portion of the instruction delivered in English have been closed across the country for political reasons. As in the Gulf States, Turkish graduates often need a year of intensive English preparatory courses before entering university because their level of English is too low for the degree they plan to pursue.

English proficiency in Russia is not improving either; the country's score has hovered within one point of its current position for the past five years. A survey in 2014 found that 70% of Russian adults admitted to having no knowledge of any foreign language, and only 11% said they could have a conversation in English.

EF EPI Trends

Europe experienced more movement than last year, with Portugal, Croatia, Hungary, and Lithuania improving significantly and Luxembourg declining significantly. Three European countries moved from the High to the Very High Proficiency band, and three moved from the Moderate to the Low Proficiency band—a polarizing effect that is particularly notable because the countries moving down, while on the European continent, are not part of the European Union.

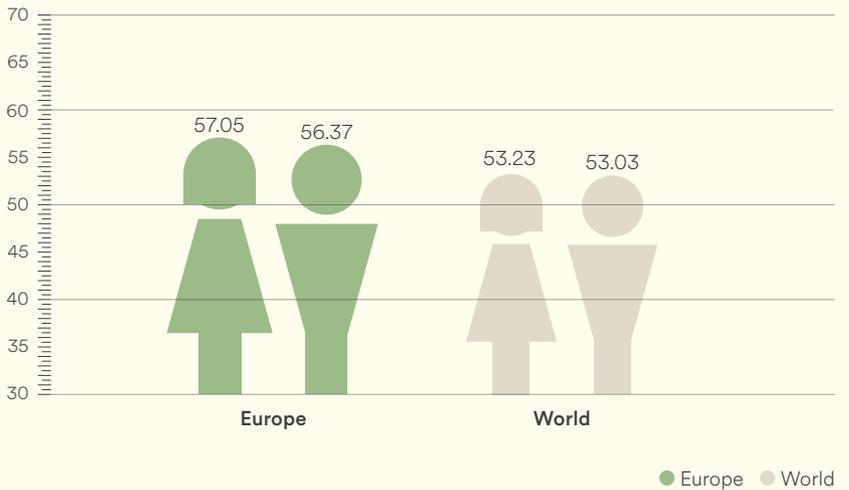
EF EPI Score Change from Last Year



Gender Gap

Consistent with previous years, women outscored men in Europe, but this gap has narrowed significantly, from three points last year to less than one point this year. Indeed, men outperformed women in more than half the countries in the region, and by significant margins in Denmark and Romania. Hungary has a significant gender gap in the opposite direction, though, and a majority of the indexed European countries have gender gaps smaller than one point.

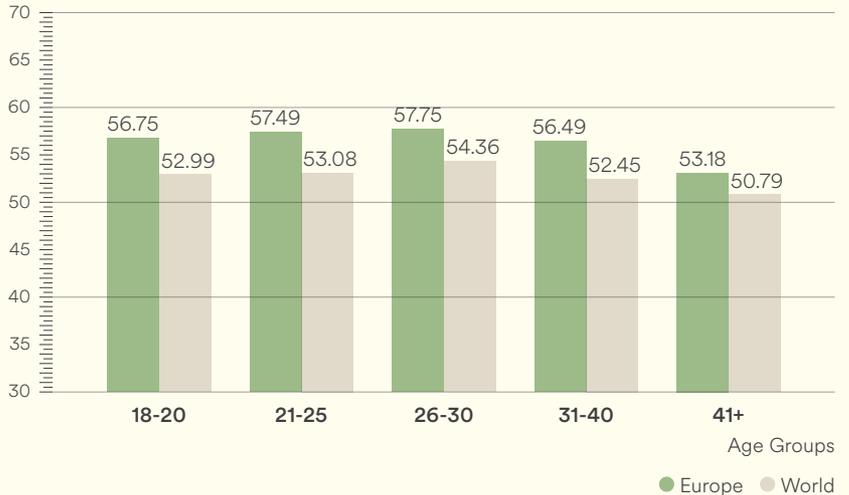
EF EPI Score



Generation Gap

Age group performance was remarkably stable in Europe as compared to last year, with the exception of people aged 18-20, who experienced a small decline. Adults in their late twenties are the most proficient English speakers on the continent. The expansion of tertiary English language instruction, often oriented toward professional use, likely deserves credit for this trend. However, the proficiency variation in all age groups under 40 in Europe is the narrowest in the world.

EF EPI Score



ASIA

EF EPI Rankings

05 Singapore	66.82	52 Vietnam	51.57	86 Myanmar	46.00
20 Philippines	60.14	53 Japan	51.51	88 Mongolia	45.56
26 Malaysia	58.55	54 Pakistan	51.41	89 Afghanistan	45.36
33 Hong Kong, China	55.63	61 Indonesia	50.06	93 Kazakhstan	43.83
34 India	55.49	66 Nepal	49.00	94 Cambodia	43.78
37 South Korea	55.04	71 Bangladesh	48.11	95 Uzbekistan	43.18
38 Taiwan, China	54.18	72 Maldives	48.02	99 Kyrgyzstan	41.51
40 China	53.44	74 Thailand	47.61		
41 Macau, China	53.34	78 Sri Lanka	47.10		

Proficiency Bands ● Very High ● High ● Moderate ● Low ● Very Low



Room for improvement

For decades, Asia has been the workshop of the world, fueling economic development across the region. But a transition from manufacturing to knowledge-driven growth will require better English.

Despite major investments in English education, in both the private and public sectors, the average English proficiency score in Asia has remained stable for the past five years. That average, though, masks substantial diversity: Asia is the region with the widest range of English proficiency levels, from Singapore (with a score of 66.82) to Kyrgyzstan (with a score of 41.51). This year, in the population-weighted regional average, China's rising proficiency counterbalances declines in most other countries.

Transforming English education

Forty years after China opened itself to foreign investment and private business, the country's transformation has been remarkable. Two-thirds of the world's decline in poverty since 1990 occurred in China. Since 2000, China's focus has shifted to developing a world-class scientific community and cultivating soft power abroad. Recognizing that English proficiency is key to meeting those objectives, China has expanded English instruction to schools across the country, transitioned from memorization-driven to communication-driven teaching, reformed the national assessment tool, incentivized foreign-educated Chinese talent to return home, and invested in transforming its leading universities into world-class research institutions that publish in top English-language journals. Few political leaders can exercise this kind of long-term planning and control over their countries, but the pillars of China's strategy offer a replicable model for how policy reform and targeted investment can raise a country's English proficiency level.

Not just for kids

The populations of some of Asia's largest countries are aging quickly. In Japan, for example, 28% of people are over 65. This demographic shift has led the Japanese government to encourage older adults to retire later. But if these experienced employees are to remain productive in a rapidly changing workplace, their longer careers need to be supported by expanded adult education provision, including English training. That need is especially pressing in Japan, where English proficiency levels have declined for years, even as the economy stagnates and global trade moves elsewhere in Asia.

Even the wealthiest countries in Asia lag behind Europe in funding for adult education outside the workplace. This funding oversight is unsustainable. With an aging workforce and limited tolerance for immigration, countries like Japan and South Korea need to encourage those already working to upskill. The benefits are not only professional; research suggests that lifelong learning is protective against dementia.

Zones of opportunity

English proficiency in Central Asia is markedly lower than the rest of the region, partly because Russian is the most commonly taught second language in schools. The region, though, is beginning to pivot more toward international trade, including with partners outside the orbit of post-Soviet republics. Kazakhstan in particular has been increasing its involvement with China through such high-visibility projects as the Belt and Road Initiative's New Eurasian Land Bridge. In 2018, President Nursultan Nazarbayev announced that agreements for 51 Chinese-Kazakh projects had been signed and 1,200 joint enterprises were already in operation. As Central Asia continues to open up to global trade, it will experience a more pressing need for English speakers.

In Cambodia, Thailand, and Sri Lanka, a lack of English proficiency hampers access to jobs in the tourism industry, which represents at least 10% of their economies. With comparatively low wages and beautiful scenery, these countries already attract over 38 million visitors per year. These visitors are mainly concentrated in resort areas. In order to spread the wealth more evenly to different regions and open jobs in tourism to more of the people who want them, schools will need to do a better job teaching English to all students.

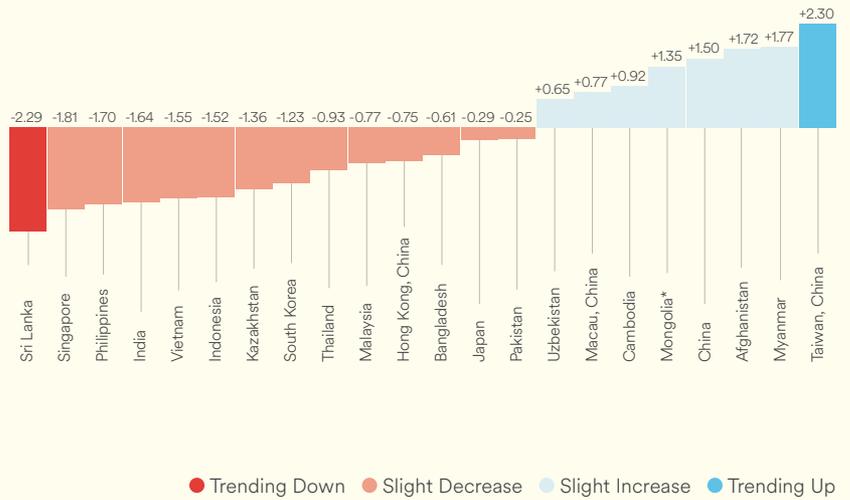
Education systems in India and Pakistan face structural challenges beyond English education. One in every 13 unschooled children in the world lives in Pakistan. A recent study in India found that only 27% of third-grade students could do double-digit subtraction, and 38% could not read simple words. The fact that so many schools in both countries use English as their language of instruction, even though most students do not speak the language, only makes matters worse. Among other reforms, policymakers in these countries need to offer more students instruction in their native languages—a policy that actually helps English learning in the long run, along with comprehension of core subjects.

Asian economies have experienced extraordinary economic growth over the past several decades, guided by leaders who forged global connections and built robust multinational companies. As Asian countries seek to expand into service and knowledge-based industries, and as the region's growing middle class clamors for more opportunities, it will be essential to offer high-quality English instruction to a broader segment of the population. In many cases, that will mean improving English instruction in schools. In some contexts, adult instruction is of nearly equal importance.

EF EPI Trends

A majority of the countries and territories in Asia saw a decline in overall English proficiency this year, although mostly by fewer than two points. Only Taiwan experienced a significant improvement in English proficiency. Six countries changed to a new proficiency band, including Sri Lanka, which slipped back into the Very Low Proficiency band that it occupied until 2018.

EF EPI Score Change from Last Year

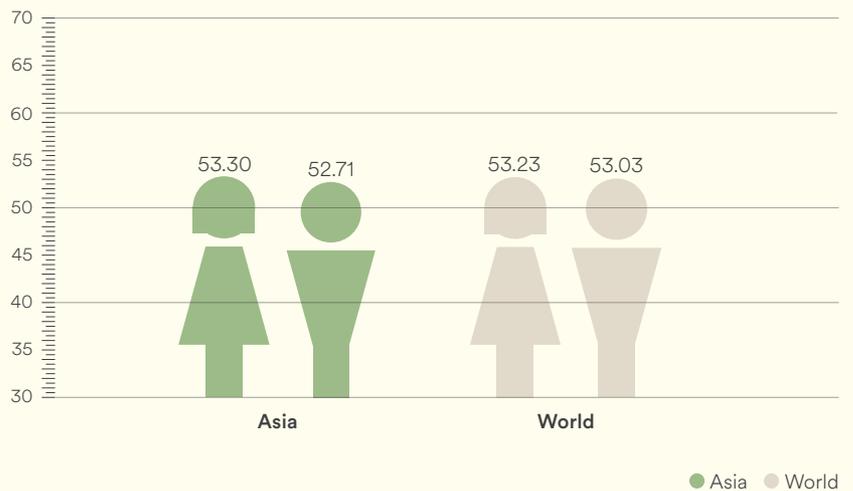


* This country did not appear in the EF EPI eighth edition, so this score comes from an earlier edition of the EF EPI.

Gender Gap

On average, men and women in Asia speak English at almost exactly the same level. But gender gaps can be wide in individual countries. Half of the territories surveyed this year in Asia had a gender gap of one point or more. In Afghanistan and the Maldives, women outscored men by at least two points. In Malaysia, it was men who outscored women by significant margins.

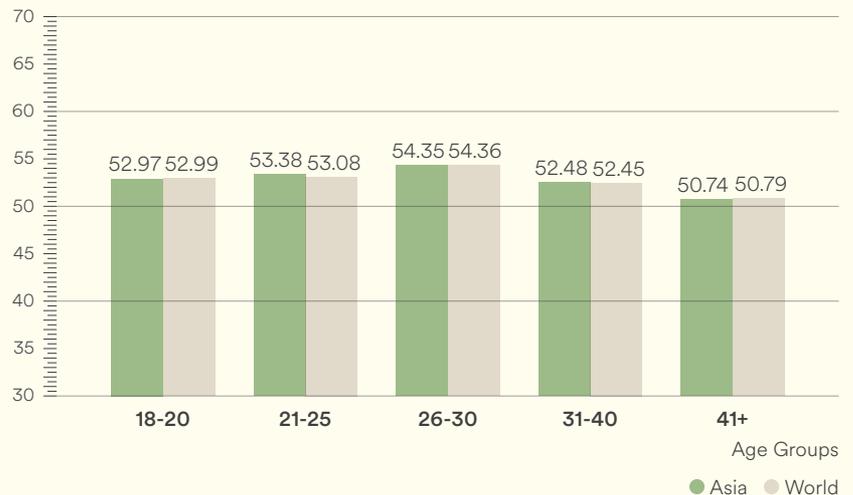
EF EPI Score



Generation Gap

Other than adults aged 26-30, every age group in Asia posted lower English proficiency scores than last year, and, as in Europe, it is now professionals in their late twenties who have the highest English proficiency overall.

EF EPI Score



LATIN AMERICA

EF EPI Rankings

27	Argentina	58.38	58	Peru	50.22
30	Costa Rica	57.38	59	Brazil	50.10
39	Uruguay	54.08	60	El Salvador	50.09
42	Chile	52.89	62	Nicaragua	49.89
43	Cuba	52.70	64	Panama	49.60
44	Dominican Republic	52.58	67	Mexico	48.99
45	Paraguay	52.51	68	Colombia	48.75
46	Guatemala	52.50	73	Venezuela	47.81
51	Bolivia	51.64	81	Ecuador	46.57
57	Honduras	50.53			

Proficiency Bands ● Very High ● High ● Moderate ● Low ● Very Low



Investment brings results

After years of stagnation, plans to improve English proficiency are finally gaining momentum in Latin America.

Twelve of the 19 Latin American countries included in this year's EF EPI improved their adult English proficiency since last year, and five improved significantly, a more positive trend than in any other region. Although the population-weighted regional average only increased slightly, due to the downward pressure of Brazil and Mexico, the overall trend is encouraging.

When investments pay off

In the past two decades, Latin American countries have made enormous progress in ensuring that all children have access to education. Now, attention has shifted to English skills. The Latin American business community is increasingly vocal in its demand for more English speakers, and, in response, a majority of the region's countries have rolled out education reforms to teach English better and more widely. It is too early to judge these reforms based solely on adult proficiency levels, but national testing has shown promising results among students. Successful models will provide a roadmap for countries with less successful programs in the region.

For the second year running, Costa Rica's English proficiency has improved. English has been a required subject there for decades, but, unlike many countries in the region, Costa Rica has invested heavily in teacher training and recruitment. Today English is taught in every secondary school and in 87% of primary schools, and nearly every English teacher holds a tertiary degree. Testing in 2015 showed that Costa Rican English teachers have the highest level of language mastery in the region.

In 2015, Uruguay rolled out an ambitious plan to raise English proficiency, investing in technology to enable remote English teaching at schools with no qualified English teacher on site. All urban public schools now have either locally or remotely taught English lessons, and the online course offering has been expanded to teachers to encourage them to upskill. The results so far are positive, with nearly 80% of students at the end of primary school testing at an A2 level or above, compared to just 56% in 2014.

Although it is one of the poorest countries in Latin America, Bolivia has cut rates of extreme poverty by half in the past decade and dramatically improved access to schools in rural areas. Literacy rates have risen accordingly, and our data shows that English proficiency is also on the rise, with a 2.77 point increase since last year.

With stability, growth

Latin America is a region plagued by violence, with 42 of the world's 50 deadliest cities, as determined by homicide rates. Fifteen of these cities are located in Mexico, and another 14 are in Brazil. These two large countries have also seen their English proficiency scores decline since 2017, and, although there is no direct link between this result and levels of violence, both are indicators of the fragility of state services.

El Salvador, Nicaragua, and Honduras, infamous for high levels of violence, have made enormous progress in safety and policing. Murder rates are down 50% in El Salvador since 2015, and by a similar margin in Honduras since 2011. All three countries have seen significant improvements in their English proficiency since last year. These are still by no means safe countries, and, again, there is no causal link between levels of violence and English proficiency, but it is clear that when people are free to work and study without fear, society flourishes.

Uneven access

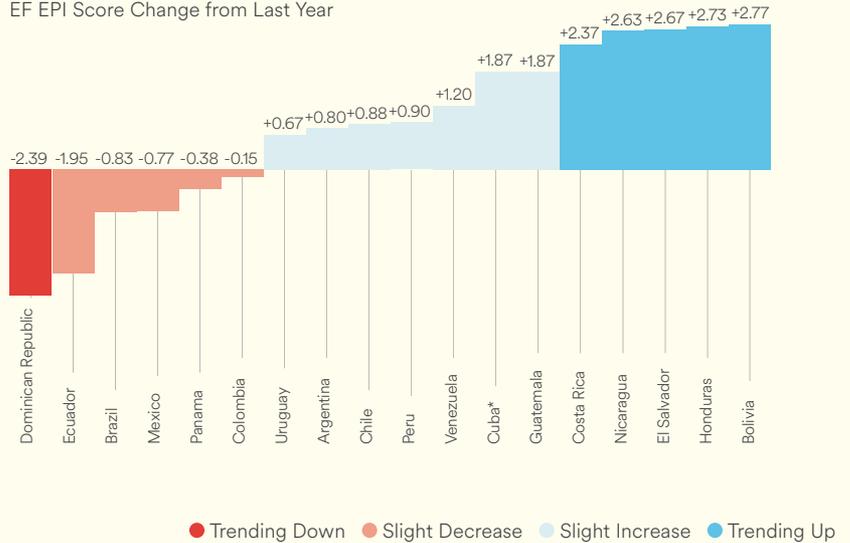
Despite laws that make English a required subject in most Latin American countries, access to English classes remains uneven. In some regions of Mexico, less than 10% of schools offer English lessons despite their legal obligation to do so. In Ecuador in 2014, that figure was less than 7%. Disparities in access to English education are particularly acute between rural and urban areas, and between private and public schools. In some countries, the demand for English in the workplace is so high, and the school provision so poor, that huge numbers of professionals invest in English lessons. A 2015 study in Brazil found that 87% of adults surveyed had paid for English courses since completing their education.

EF EPI Trends

Two-thirds of countries in Latin America experienced improved English proficiency this year, with five making significant improvements. Only the Dominican Republic saw a significant decline. Six countries moved from lower to higher proficiency bands, and the number of Latin American countries in the Moderate Proficiency band more than doubled. Despite these changes, the score spread in Latin America remains narrow. Only 12 points separate Argentina, the highest scoring country, from Ecuador, the lowest.

* This country did not appear in the EF EPI eighth edition, so this score comes from an earlier edition of the EF EPI.

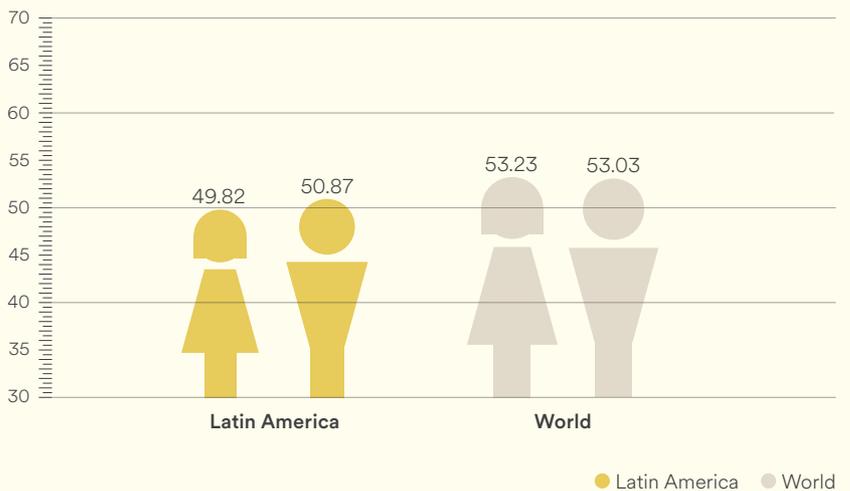
EF EPI Score Change from Last Year



Gender Gap

Men scored higher than women for the first time in Latin America, but, as in most other regions, the gender gap is narrow. Men outscore women in well over half the countries, with a gap of more than two points in Mexico and Panama. The situation is reversed in a few countries, but the gender gap is narrow.

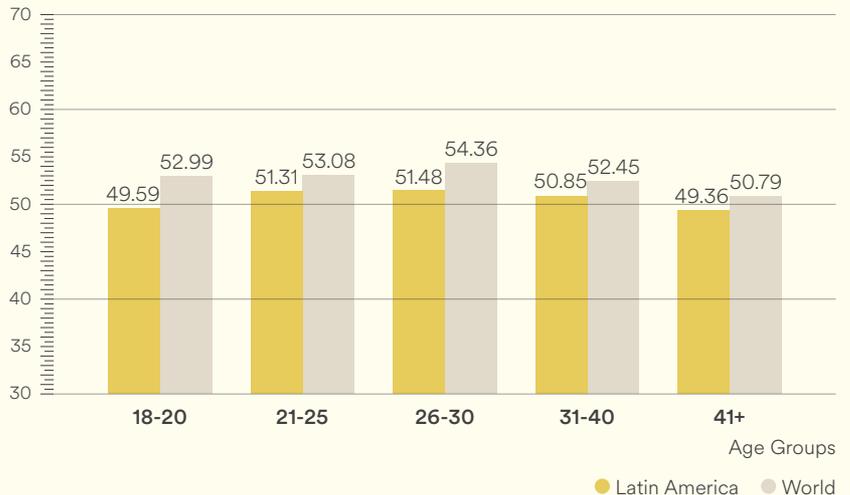
EF EPI Score



Generation Gap

Older Latin American adults improved their English proficiency, while younger adults did not. In contrast to demographic patterns elsewhere, adults over 40 in Latin America speak English as well, on average, as recent graduates. However, the region has narrow score differences between age bands, with the highest and lowest scoring age groups separated by less than two points. Given the scarcity of government funding for adult education, the improvements among older adults are probably the result of corporate training programs, individual investments, and broader exposure to English-language media.

EF EPI Score

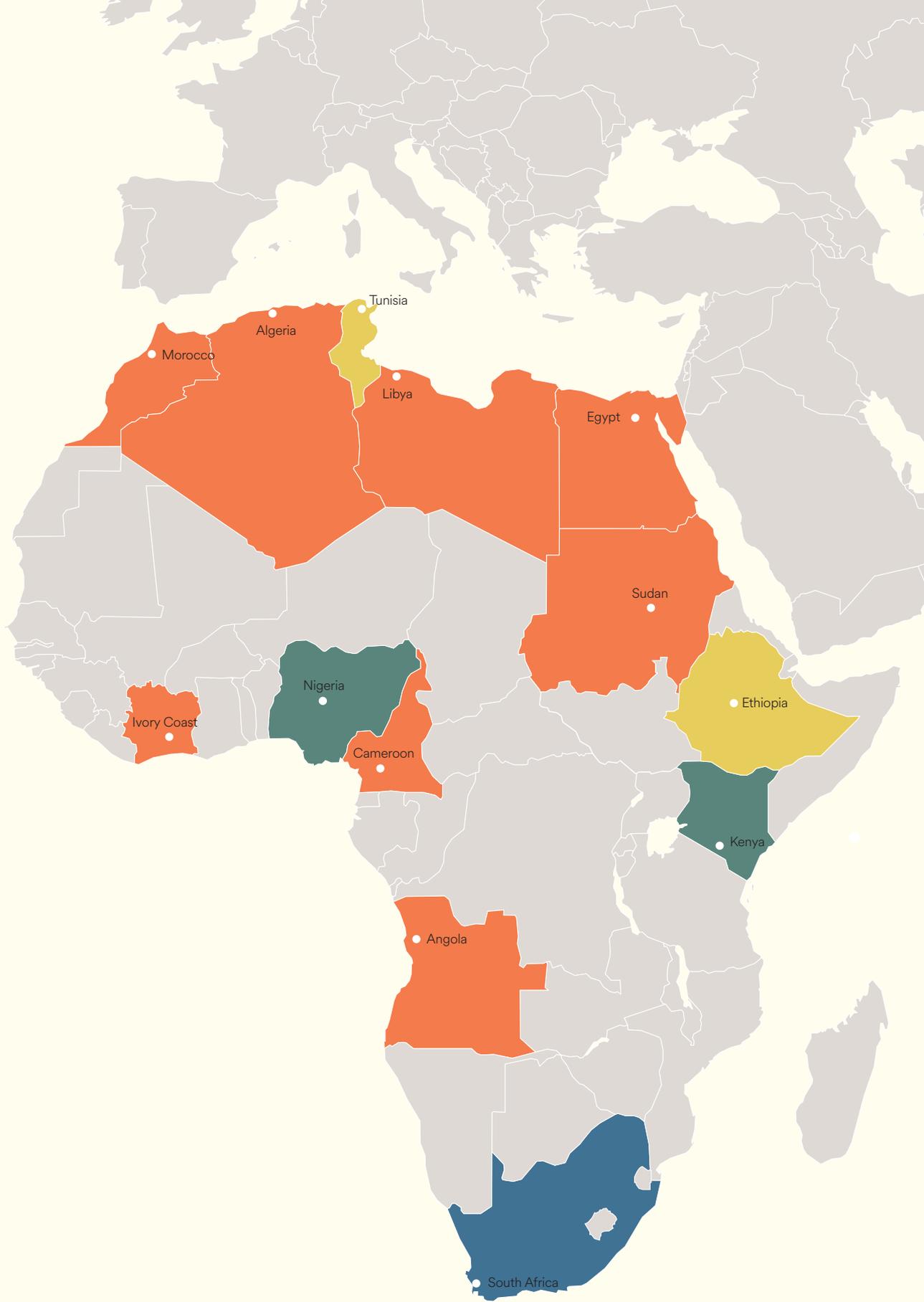


AFRICA

EF EPI Rankings

06 South Africa	65.38	83 Cameroon	46.28
18 Kenya	60.51	87 Sudan	45.94
29 Nigeria	58.26	90 Algeria	45.28
63 Ethiopia	49.64	91 Angola	44.54
65 Tunisia	49.04	96 Ivory Coast	42.41
76 Morocco	47.19	100 Libya	40.87
77 Egypt	47.11		

Proficiency Bands ● Very High ● High ● Moderate ● Low ● Very Low



New generations, new opportunities

The past decade has seen a surge of foreign investment in infrastructure and business projects in Africa. Better English would strengthen these international collaborations.

While European colonial powers, in particular France, have long maintained close relationships with African countries, it is China that has driven the most recent wave of foreign investment in the continent. Today, Africa is buzzing with large infrastructure projects, trade deals, and new business ventures. More than 320 new embassies and consulates opened in Africa between 2010 and 2016. But past scrambles for the continent's wealth, marked by violence and colonial oppression, cast a long shadow. Better English proficiency would help foreign investors and their African partners to deliver more transparent contracts and smoother cooperation.

Mind the gap

In this year's Index, there is a yawning proficiency gap between Kenya, Nigeria, and South Africa—which all fall in the upper portion of the Index, and which have three of the largest economies in Africa—and the other ten countries surveyed. Unfortunately, we only have enough data to include 13 countries in Africa in this year's Index. That is more than ever before, but it is still too few to get a clear picture of the continent as a whole. There may, in fact, be a wide gap between high and low proficiency countries, or it may be that there is more of a spectrum of skill levels than this data indicates. We can only encourage more African adults to test their English so that future editions will be more complete.

Inequality is endemic across Africa. In cities, it is common to see skyscrapers surrounded by slums. The gap between urban and rural standards of living is often equally jarring. There are structural and historical reasons for these inequalities, and rapid population growth and urbanization are aggravating the problem. The UN projects that the population of Africa will double in the next 35 years. The continent is home to

21 of the world's 30 fastest growing urban areas. African education systems are largely unprepared to train so many young people, raising the possibility that vast numbers of poorly educated young adults will struggle to find economic opportunities while migratory pressures on Europe remain high.

Mother tongue education

Colonial history has linked European languages with high social status in the minds of many Africans. As a result, local school systems often prioritize teaching in English or French, rather than local languages.

It is time to end that practice. A robust body of research shows that children who are not taught to read and write in their native language are at a permanent disadvantage, yet nearly every sub-Saharan African country uses a colonial language as the language of instruction in its education system, with the exception of Ethiopia, Eritrea, and Tanzania. A recent study of 12 schools in Cameroon that switched from teaching in English to teaching in Kom, the children's native language, found that after five years Kom-medium children performed better in all subjects, including English. Kenya introduced daily Kiswahili lessons in primary schools this year, although the bulk of instruction remains in English.

Because many African countries have diverse linguistic landscapes, switching to native-language instruction requires significant investments in curriculum development, but ensuring that all children are literate in their mother tongue is well worth the money. There are advantages to speaking an international language such as English or French as well, and in regions with several commonly spoken languages, either of these international languages may serve as a bridge between communities

as well as a link to the wider world. The challenge of deciding which language to teach in mixed-language communities is significant, but the educational advantages of several years of native-language education for every child make overcoming those challenges worthwhile.

Explain yourself

Adults in North Africa speak English at levels similar to their peers in the Middle East. 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 is increasingly valued, particularly for its neutrality and business potential. Algeria, Libya, and Tunisia have all experienced modest improvements in English proficiency since last year, although they will need to invest more in English education if they are to prepare their young workforces for entrepreneurship in internationally competitive markets.

More openness and exchange would benefit North Africa considerably, both economically and socially. A quarter of young men in the region are unemployed, and it remains one of the lowest-performing regions in the world in terms of gender equality. Only 26% of women find work outside the home, and those who do are paid 30-50% less than their male counterparts. These gender roles, combined with media-fed fears of terrorism and the lack of English skills, contribute to the "othering" of North Africans, cutting them off from the economic opportunities they so desperately seek.

EF EPI Trends

Most African countries included in the Index did not experience a significant change in proficiency level, although both Nigeria and Tunisia moved to a higher proficiency band. Both Cameroon (which did not have enough data to be included in last year's Index) and Nigeria experienced significant improvement between 2017 and 2019. Egypt is the only country in Africa to have moved to a lower proficiency band since 2018.

EF EPI Score Change from Last Year



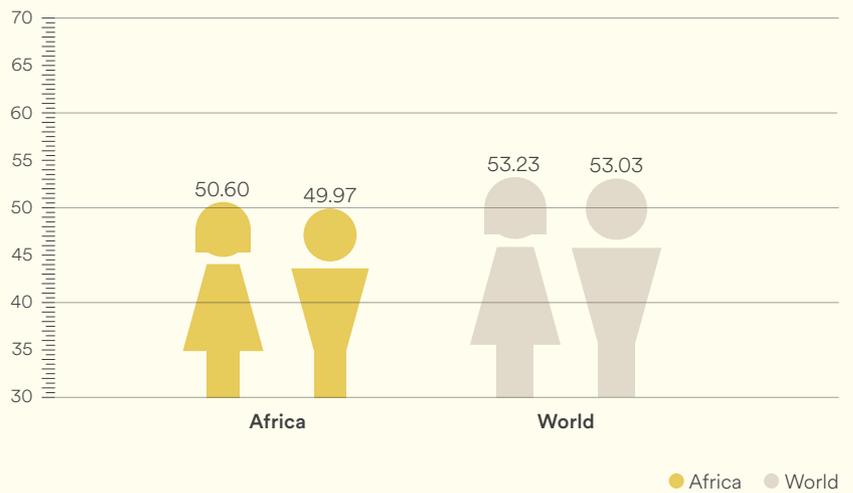
* This country did not appear in the EF EPI eighth edition, so this score comes from an earlier edition of the EF EPI.

● Trending Down ● Slight Decrease ● Slight Increase ● Trending Up

Gender Gap

Women's average English proficiency is better than men's in Africa, although the gender gap has shrunk since last year. Women outscored men in every African country except Egypt and South Africa, and in those two countries the gender gaps are extremely narrow.

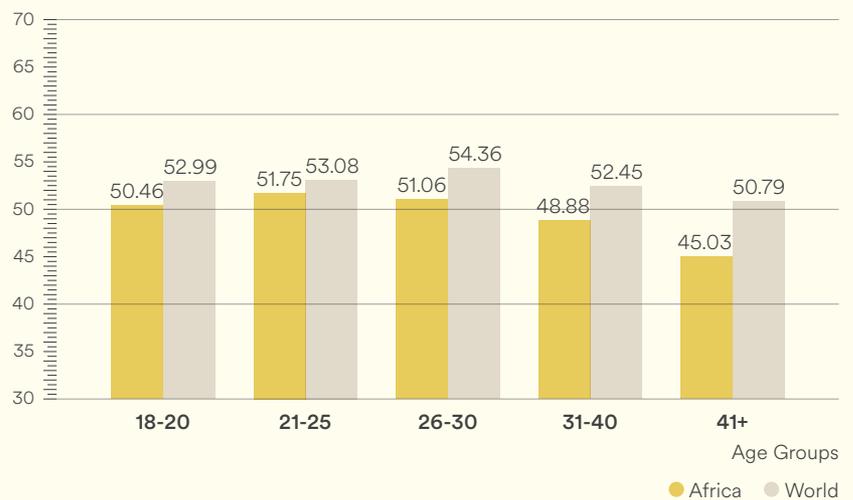
EF EPI Score



Generation Gap

Young adults in Africa have the best English proficiency, with a significant gap between adults under 30 and older adults. On such a young continent, this is promising news. As in other regions, it is not the youngest adults who speak the best English, but those in their twenties. These young adults have had the opportunity to use English in university or at work. The impact of actually putting one's English to good use is clear—English improves with practice.

EF EPI Score



MIDDLE EAST

EF EPI Rankings

55	Bahrain	50.92	82	Syria	46.36
69	Iran	48.69	84	Kuwait	46.22
70	U.A.E.	48.19	92	Oman	44.39
75	Jordan	47.21	97	Iraq	42.39
80	Qatar	46.79	98	Saudi Arabia	41.60

Proficiency Bands ● Very High ● High ● Moderate ● Low ● Very Low



Ready for change

Once at the forefront of science, literature, and trade, the cultures of the Middle East are today more marginal to cutting-edge research and economic production. But change may be coming to the region.

Half of the population of the Middle East is under 30, and it has become clear that the public sector cannot afford to employ all of them. In addition, petroleum and gas-rich countries understand that carbon-based economies will soon become a thing of the past. In the past two decades, these countries have invested more in education—a wise decision considering their young populations.

Opportunities of youth

The Gulf States have transformed their higher education systems in the past two decades. Among other reforms, government leaders have loosened public universities' monopolies, supporting private institutions that bring in Western-trained academics and offer courses in English. Officials in the U.A.E. and Qatar have also invited elite Western universities to set up satellite campuses in their countries. This competition has pushed public universities to reform, westernizing their curricula and switching to English for some degree programs.

Disappointing results

Unfortunately, progress in teaching basic skills to schoolchildren has been slower, and many countries have been forced to set up programs to help transition students from secondary school to university. Literacy rates have risen rapidly across the region, but in the latest PISA testing, 15-year-olds in the three participating Middle Eastern countries—Jordan, Qatar, and the U.A.E.—scored at the lowest available benchmarks for reading, math, and science. In the latest TIMSS tests of fourth graders in math and science, eight of the world's 11 lowest-scoring countries were in the Middle East. Our data tells the same story: English proficiency in the region is by far the lowest of any region in the world.

In some ways, it is surprising that English proficiency is not higher. The Middle East is diverse; in most countries in the region, more than 30% of the population is foreign-born. Although a portion of those immigrants speak Arabic when they arrive, many do not. Additionally, nearly a million students are enrolled in private, English-language K-12 schools in the U.A.E. and Saudi Arabia, representing 20% of the total population of students at international schools worldwide. Many higher education institutions in the Gulf States teach some or all of their courses in English, and government-funded scholarships have sent more than 200,000 university students to the US or UK to earn a degree. Yet the average level of English in the region remains low.

The challenges ahead

In some countries, the problem appears to be uneven access to English education resources. Our data finds that Dubai and Tehran, for example, have much higher levels of English proficiency than their countries as a whole. Saudi Arabia's population is spread over a huge and unevenly developed territory, with varying levels of access to English instruction in schools. Placing qualified English teachers in every school is admittedly difficult, particularly when the number of English-speaking adults is so low, but other large countries like China have tackled the same problem. Hiring teachers from abroad is the solution preferred by many private schools and universities in the Middle East, but building a local professional class of English-speaking teachers would be a more sustainable solution.

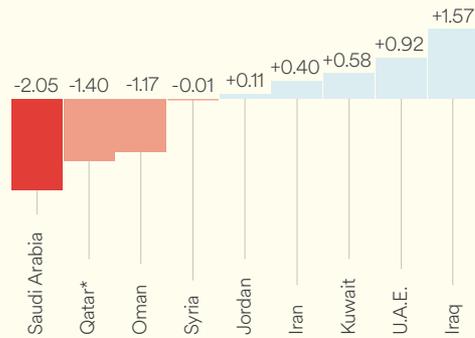
In other countries, the arrival of large numbers of refugees has stressed the education system, redirecting resources towards provision of basic services. More than one million Afghans live in Iran, and more than two million Palestinians and one million Syrians live in Jordan, a country of fewer than 10 million people. Some countries have experienced gains in English proficiency despite turmoil; Iraq, emerging from the tumult of the past two decades, has the most improved English proficiency of any country in the region.

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 whether that transition can be made smoothly amid regional tensions and a changing global energy market.

EF EPI Trends

Few countries in the Middle East experienced significant score changes in the Index this year, with the exceptions of Saudi Arabia, which underwent a significant decline, and Iran, which moved up one proficiency band. The Middle East has the narrowest score spread of any region, with only nine points separating the highest scorer, Bahrain, from the lowest, Saudi Arabia.

EF EPI Score Change from Last Year



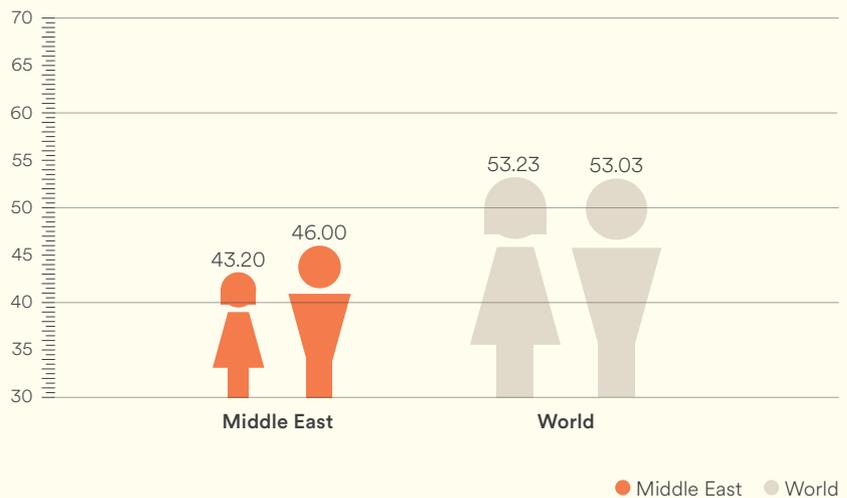
* This country did not appear in the EF EPI eighth edition, so this score comes from an earlier edition of the EF EPI.

● Trending Down ● Slight Decrease ● Slight Increase ● Trending Up

Gender Gap

A significant gender gap in English proficiency in the Middle East has appeared this year, with men outscoring women by nearly three points. Although women represent more than 50% of the university population in every country in the region, unfortunately they are still far less likely to work after graduation, giving them few opportunities to use the English they have learned in school.

EF EPI Score

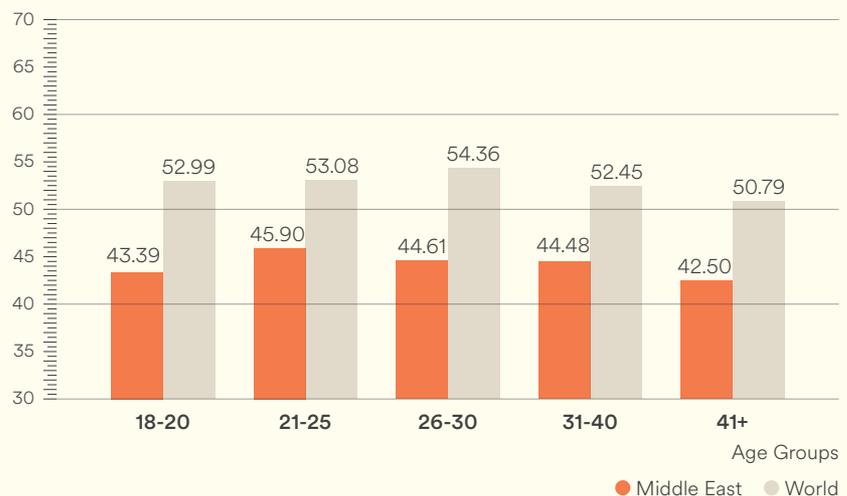


● Middle East ● World

Generation Gap

The Middle East has a relatively narrow spread of proficiency scores among age groups. Unfortunately, this data suggests that schools are teaching English no better than in the past, as both the 18-20 and 21-25 age groups experienced significant drops in English proficiency. Indeed, as in Latin America, young graduates in the Middle East speak English at roughly the same level as adults over 40.

EF EPI Score



● Middle East ● World

Conclusions

English is, by far, the most widely studied second language in the world.

Ninety-seven percent of European secondary students are learning it; it is a required subject in schools across much of Asia and Latin America; the majority of countries in Africa use English as the language of instruction; more than 90% of the people who learn a language with EF each year choose to study English.

Yet despite these massive public and private investments in teaching English, results are frustratingly uneven. Pupils with years of classroom instruction often cannot hold a conversation. Professionals see their prospects limited when their English skills cannot keep up with their ambitions.

Why is there such a mismatch between the supply and demand for English proficiency? It is largely due to the speed with which English rose in value in the workplace. In 1989, the Internet was not available to the public, and English, when it was taught at all, was offered alongside other electives. Fast-forward 30 years and our hyper-connected world uses English as its common tongue. According to Cambridge English, three-quarters of companies worldwide say English is important to their business. Those students who were attending school in 1989 and in the preceding decades are the core of the global workforce. Some speak enough English. Many do not.

Click here to meet your English teacher

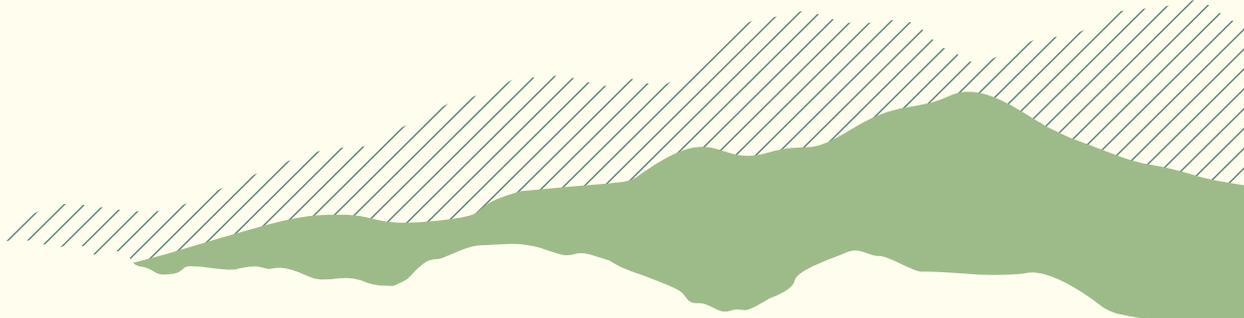
Technology helped create this problem. It may also help solve it. While giving out laptops to children is demonstrably ineffective, true digitalization—including teacher training on using the new tools—has enormous promise in the English-language classroom. Ed-tech can connect students to authentic source materials and practice modules, allowing teachers to individualize instruction. Chatbots let students practice conversation without waiting their turn in a large class. Teachers can receive subject-specific support, coaching, and professional development more consistently.

In countries without enough qualified English teachers—which is the vast majority of them—a device loaded with instructional material and an AI may eventually allow students to learn basic English on their own. For now, the urgency of training teachers can hardly be overstated. Again, technology can help. Many education ministries already understand that overhauling teacher training programs and upskilling their current teachers—in English and in other subjects—must be their top priorities. Leveraging technology to deliver teacher training at scale is a real possibility.

The forever student

Children's brains are particularly well adapted to learning languages, but the idea that adults cannot learn English has been thoroughly disproven. In a rapidly evolving society, we cannot possibly hope to learn everything we need to know in the first quarter of our lives for successful careers in the subsequent three quarters. As the world of work changes, a fundamental cultural shift towards lifelong learning is both necessary and inevitable.

The promise of technology is, if anything, even greater for adults. The flexibility of online English learning is perfectly suited to corporate training and personal upskilling. A distributed network of teachers can give adults access to higher quality instruction than available locally, and for a lower price. Universally recognized micro-credentials for English training would help reassure professionals and government sponsors about the quality of the courses they are investing in.



The myth of quick and easy

The Internet is littered with blog posts offering three amazing tips, five easy steps, and 10 great things anyone can do to learn English. If it were that simple, there would be no demand for English speakers because everyone would already be one. The reality is that an adult who does not speak English will need at least 600 hours of high-quality instruction and 600 hours of speaking practice to master English well enough for the average workplace. People whose native language is very different from English, who require advanced English skills, or who have no experience learning foreign languages will need quite a bit more time.

The myth of quick and easy language learning frustrates individual learners when their progress does not match their expectations. Many choose an English course with just a few hours of class per week, thinking it will be enough. Most give up well before reaching the 1,200 hour mark. The myth also derailes employers and governments that invest in large-scale English training. They opt for less extensive programs and programs that offer participants no opportunities to actually speak English. The smaller price tag is only attractive until they measure the results. Busting the myth that a language can be learned without lots of time and practice would improve the efficiency of both public and private investments.

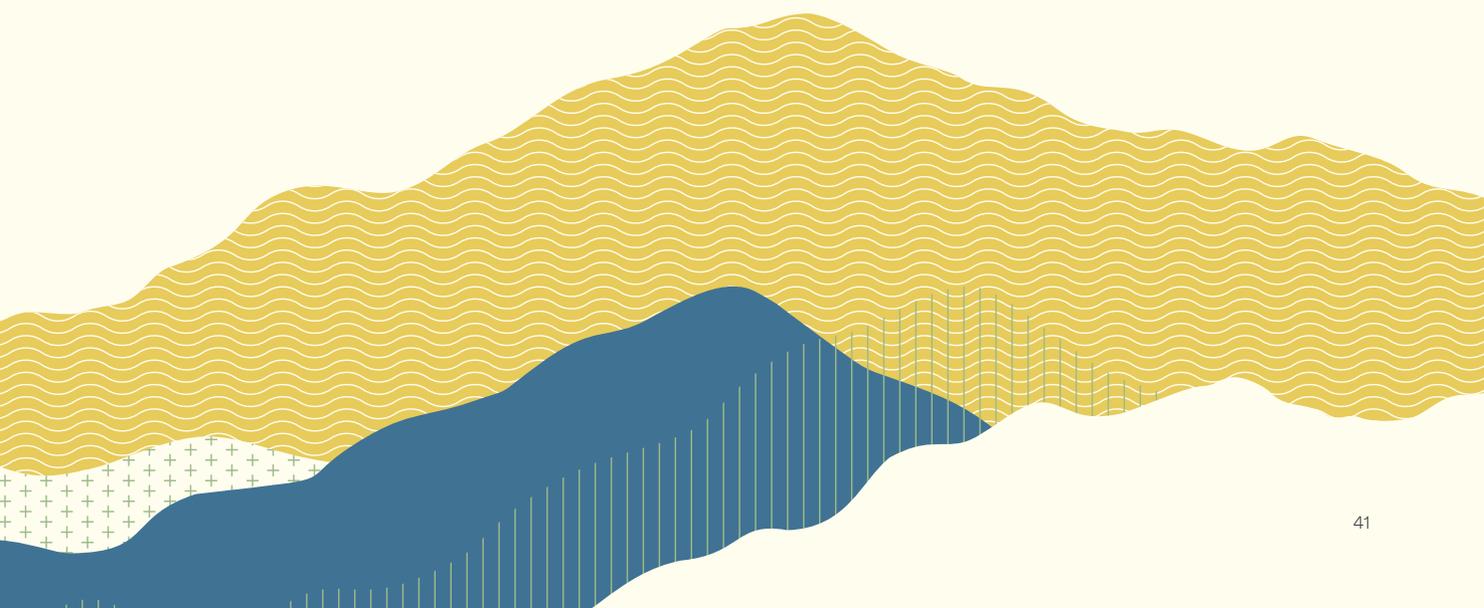
Speaking the same language

Worldwide, many people face common misconceptions about English-medium schools. Using English as the language of instruction makes perfect sense, of course, in communities where students speak English at home, or as part of a genuine bilingual education program, but it creates problems everywhere else. A large and definitive body of research shows that, in order to grow into literate and numerate adults, students must learn to read and write in their native language. That conclusion sounds perfectly obvious to native speakers of Mandarin, Spanish, and other high-status languages, but for native speakers of hundreds of lower-status languages, a mother tongue education is not available.

The problem is particularly widespread in sub-Saharan Africa, India, and Pakistan, where colonial history has given English a special status, even in areas where students, parents, and teachers know very little English. The English-speaking elite see no reason to change a system that empowers them, and English-language

schools are popular with parents who hope their children will join that elite. But several large-scale testing initiatives have shown that when children are taught in a language they do not understand, by teachers whose English is poor, they do not learn English—and they do not learn anything else, either.

Worldwide English proficiency has never been higher. This reflects the results of thousands of large and small-scale efforts to teach English around the world. But we are a long way from having a language that the whole world shares. People want to connect, they need to connect, and yet billions are being left behind. Governments, education systems, and companies must do more to ensure that English and the opportunities it affords are open to everyone.



Recommendations

Most organizations and individuals are convinced of the advantages of English proficiency in the modern world. Not everyone knows how to get there.

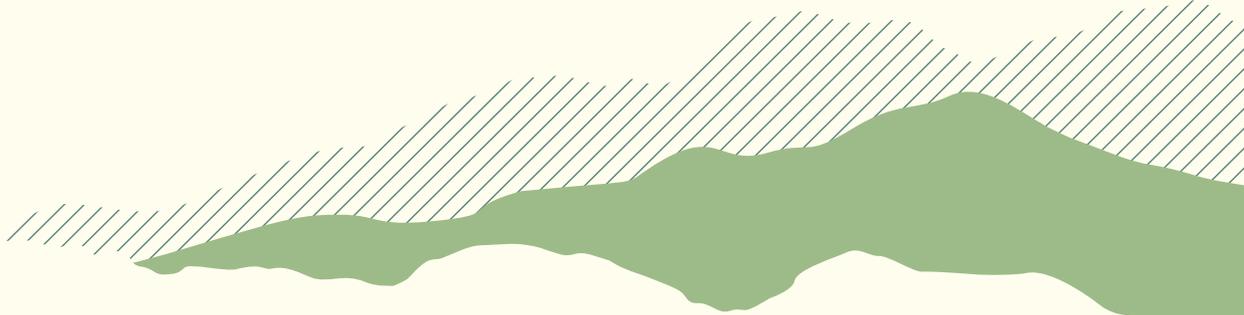
Demand for English learning software, sites, classes, and study abroad programs has never been higher. What people are less sure of is how to improve English proficiency in their organizations, in their countries, in their schools, and for themselves. Many have wasted time and money on schemes that did not deliver. Many are frustrated by missed opportunities. The truth is that there is no single solution that will work in every situation, but there are patterns that characterize the most successful English programs.

For companies

- Set realistic goals that take into account the hours needed to close the gap between current and target proficiency levels for each individual.
- Build a culture of internationalism and mobility, including in branch offices.
- Use platforms that facilitate frequent contact between teams in different countries.
- Build diverse, multi-national teams in all functions, including the back office.
- Test the entire workforce to identify strategic weaknesses in English.
- Train employees using a role-specific English curriculum.
- Leverage technology to bring flexible learning at scale.
- Set minimum standards of English proficiency for different roles, and test that those standards are being met.
- Hire strong English speakers.
- Reward employees who invest time in improving their English.
- Encourage executives and managers to lead by example and share their experiences as English learners.

For governments and education authorities

- Consider the hours available in the curriculum and the proficiency level achievable for each major educational milestone.
- Use large-scale assessment of both teachers and students to benchmark a starting point and track progress over time.
- Adjust entrance and exit exams so that they evaluate communicative English skills.
- Include English in the training regimens for all new teachers.
- Re-train English teachers in communicative teaching methods if they were initially trained using other methods.
- Ensure that English is taught only by people who speak the language well enough to instruct in it.
- Set a minimum level required to teach English, test instructors regularly, and train those who miss the mark.



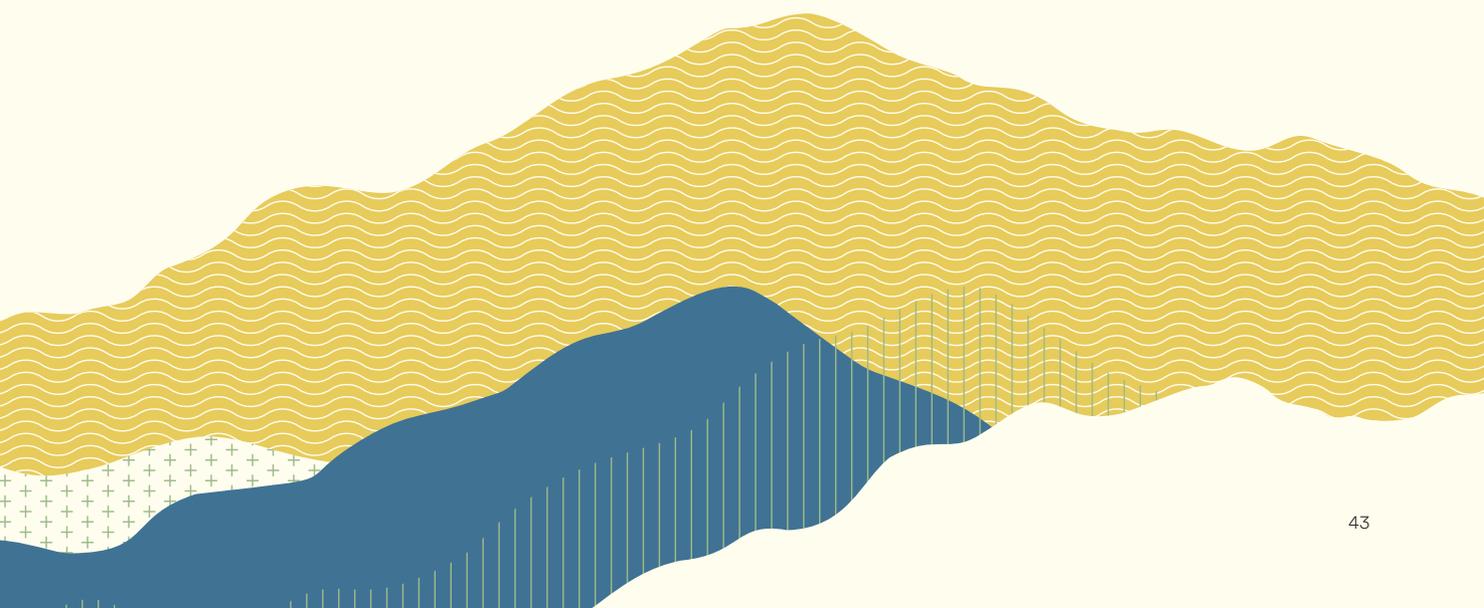
- Teach children to read and write in their own native language first.
- Assess the English skills of all public servants and provide training as necessary, not only for their current jobs, but also for their careers.
- Provide English language instruction in job centers and unemployment reduction programs.
- Give adults access to lifelong learning programs.
- Ensure that government-funded adult language courses are long enough and intensive enough for learners to meet their goals.
- Develop standardized micro-credentials that certify course quality and improve skill portability.
- Allow TV shows and movies to be shown in their original language, with subtitles rather than dubbing.

For teachers, schools, and universities

- Teach English using a communication-based methodology.
- Give students frequent opportunities to speak English through activities like English clubs, theme days, classroom twinning, school trips, and guest speakers.
- Provide a forum for teachers to share best practices and get advice about teaching English effectively.
- Give teachers a straightforward path to improve their own English.
- Include English language requirements for all university majors.
- Allow subject classes to be taught in English if both the students and the professor meet the requisite English level.

For individuals

- Play the long game: plan for the hundreds of hours it takes to move from one proficiency level to the next.
- Be aware of growing competence at different stages and celebrate your successes.
- Study English every day, even if only for a few minutes.
- Study in sessions of 20-30 minutes rather than for hours at a time.
- Set specific, achievable goals and write them down.
- Memorize vocabulary relevant to your job or field of study and begin using it immediately.
- Practice speaking, even if it's just reading a book aloud.
- Watch TV, read, or listen to the radio in English.
- When traveling to an English-speaking country, speak as much as possible.



About the Index

Methodology

This ninth edition of the EF EPI is based on test data from more than 2,300,000 test takers around the world who took the EF Standard English Test (EF SET) or one of our English placement tests in 2018.

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 2019 scores have been found to correlate strongly with TOEFL iBT 2017 scores ($r=0.80$) and IELTS Academic Test 2017 scores ($r=0.74$). 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 59% of the overall sample.
- The median age of adult respondents was 23.
- 83% of all respondents were under the age of 35, and 99% were under the age of 60.
- The median age of male respondents was 24, slightly higher than the median age of female respondents, which was 23.

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. Senegal, Lebanon, and Slovenia 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. 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 five weighted components which include four English tests and the EF EPI from 2018. Inclusion of the previous year's Index helps to stabilize scores year over year, but test takers from the previous year are not counted in the total test taker count for the current year. Regional averages are weighted by population.

Based on score thresholds, we assign 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 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.

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. 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.

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 biennially and looks at English proficiency among secondary school and university students. This year, we are publishing the EF EPI ninth edition and the EF EPI-s third edition. 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 600 schools and offices in 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.

EF EPI Proficiency Bands

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 on the right, 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.

Proficiency	Sample Tasks
Very High Netherlands Singapore Sweden	<ul style="list-style-type: none"> ✓ Use nuanced and appropriate language in social situations ✓ Read advanced texts with ease ✓ Negotiate a contract with a native English speaker
High Hungary Kenya Philippines	<ul style="list-style-type: none"> ✓ Make a presentation at work ✓ Understand TV shows ✓ Read a newspaper
Moderate China Costa Rica France	<ul style="list-style-type: none"> ✓ Participate in meetings in one’s area of expertise ✓ Understand song lyrics ✓ Write professional emails on familiar subjects
Low Bolivia Pakistan Russia	<ul style="list-style-type: none"> ✓ Navigate an English-speaking country as a tourist ✓ Engage in small talk with colleagues ✓ Understand simple emails from colleagues
Very Low Bangladesh Maldives U.A.E.	<ul style="list-style-type: none"> ✓ Introduce oneself simply (name, age, country of origin) ✓ Understand simple signs ✓ Give basic directions to a foreign visitor

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 eighth edition and ninth edition scores. Any change greater than two points—positive or negative—indicates a significant shift in English ability. The EF EPI eighth edition used test data from 2017, and the ninth from 2018.

	EF EPI 8th Edition	EF EPI 9th Edition	Score Change
Netherlands	70.31	70.27	-0.04
Sweden	70.72	68.74	-1.98
Norway	68.38	67.93	-0.45
Denmark	67.34	67.87	+0.53
Singapore	68.63	66.82	-1.81
South Africa	66.52	65.38	-1.14
Finland	65.86	65.34	-0.52
Austria	63.13	64.11	+0.98
Luxembourg	66.33	64.03	-2.30
Germany	63.74	63.77	+0.03
Poland	62.45	63.76	+1.31
Portugal	60.02	63.14	+3.12
Belgium	63.52	63.09	-0.43
Croatia	60.16	63.07	+2.91
Hungary	59.51	61.86	+2.35
Romania	60.31	61.36	+1.05
Serbia	60.04	61.30	+1.26
Kenya	—	60.51	New
Switzerland	61.77	60.23	-1.54
Philippines	61.84	60.14	-1.70
Lithuania	57.81	60.11	+2.30
Greece	58.49	59.87	+1.38
Czech Republic	59.99	59.30	-0.69
Bulgaria	57.95	58.97	+1.02
Slovakia	58.11	58.82	+0.71
Malaysia	59.32	58.55	-0.77
Argentina	57.58	58.38	+0.80
Estonia	63.73*	58.29	-5.44
Nigeria	56.72	58.26	+1.54
Costa Rica	55.01	57.38	+2.37
France	55.49	57.25	+1.76
Latvia	57.16*	56.85	-0.31
Hong Kong, China	56.38	55.63	-0.75
India	57.13	55.49	-1.64
Spain	55.85	55.46	-0.39
Italy	55.77	55.31	-0.46
South Korea	56.27	55.04	-1.23
Taiwan, China	51.88	54.18	+2.30
Uruguay	53.41	54.08	+0.67
China	51.94	53.44	+1.50
Macau, China	52.57	53.34	+0.77
Chile	52.01	52.89	+0.88
Cuba	50.83*	52.70	+1.87
Dominican Republic	54.97	52.58	-2.39
Paraguay	—	52.51	New
Guatemala	50.63	52.50	+1.87
Belarus	53.53	52.39	-1.14
Russia	52.96	52.14	-0.82
Ukraine	52.86	52.13	-0.73
Albania	51.49	51.99	+0.50

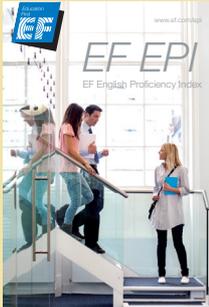
* This country or region did not appear in the EF EPI eighth edition, so this score comes from an earlier edition of the EF EPI.

	EF EPI 8th Edition	EF EPI 9th Edition	Score Change
Bolivia	48.87	51.64	+2.77
Vietnam	53.12	51.57	-1.55
Japan	51.80	51.51	-0.29
Pakistan	51.66	51.41	-0.25
Bahrain	—	50.92	New
Georgia	52.28	50.62	-1.66
Honduras	47.80	50.53	+2.73
Peru	49.32	50.22	+0.90
Brazil	50.93	50.10	-0.83
El Salvador	47.42	50.09	+2.67
Indonesia	51.58	50.06	-1.52
Nicaragua	47.26	49.89	+2.63
Ethiopia	50.79	49.64	-1.15
Panama	49.98	49.60	-0.38
Tunisia	47.85	49.04	+1.19
Nepal	—	49.00	New
Mexico	49.76	48.99	-0.77
Colombia	48.90	48.75	-0.15
Iran	48.29	48.69	+0.40
U.A.E.	47.27	48.19	+0.92
Bangladesh	48.72	48.11	-0.61
Maldives	—	48.02	New
Venezuela	46.61	47.81	+1.20
Thailand	48.54	47.61	-0.93
Jordan	47.10	47.21	+0.11
Morocco	48.10	47.19	-0.91
Egypt	48.76	47.11	-1.65
Sri Lanka	49.39	47.10	-2.29
Turkey	47.17	46.81	-0.36
Qatar	48.19*	46.79	-1.40
Ecuador	48.52	46.57	-1.95
Syria	46.37	46.36	-0.01
Cameroon	42.45*	46.28	+3.83
Kuwait	45.64	46.22	+0.58
Azerbaijan	45.85	46.13	+0.28
Myanmar	44.23	46.00	+1.77
Sudan	—	45.94	New
Mongolia	44.21*	45.56	+1.35
Afghanistan	43.64	45.36	+1.72
Algeria	44.50	45.28	+0.78
Angola	43.49*	44.54	+1.05
Oman	45.56	44.39	-1.17
Kazakhstan	45.19	43.83	-1.36
Cambodia	42.86	43.78	+0.92
Uzbekistan	42.53	43.18	+0.65
Ivory Coast	—	42.41	New
Iraq	40.82	42.39	+1.57
Saudi Arabia	43.65	41.60	-2.05
Kyrgyzstan	—	41.51	New
Libya	39.64	40.87	+1.23

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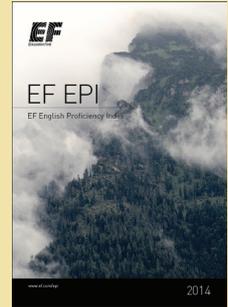
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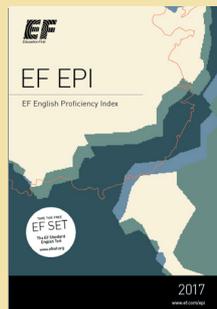
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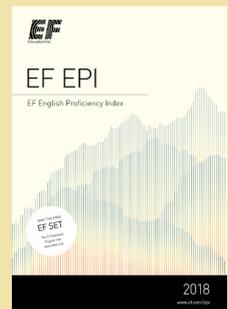
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