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Cheers
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Goodbye
Hi!
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Good morning
What's up?
Have a good day
Have a good day!
Cheers
Welcome
G'day mate
Hello
How are you?
你好
你好吗
今天好，
干杯
欢迎
Goodbye
Hello
Have a good day
Good morning
G'day mate
Welcome
Cheers
What's up?
Have a good day
Hello
Cheers
Welcome
Hello
Hi
Hello

EXECUTIVE SUMMARY

Year by year, economies are more globalized, work more delocalized, and information more decentralized. A shared language is a necessary tool when communication is no longer tied to geography. English is that tool, now more than ever.

Educational institutions, driven by the demands of society, are increasingly embracing English language learning. Many school systems now require English study starting in primary school, much as they do math or science. University professors are delivering lectures in English to prepare their students better for life after graduation. Companies both large and small, international and domestic, are mandating English as their corporate language. And individuals, whether job seekers or ambitious parents, are pouring money into private English training.

Yet with all this motivation and investment in English, many countries are failing to measure the results of their efforts. Are there concrete returns in the form of economic growth and increased competitiveness? It is in this context that we originally introduced the EF English Proficiency Index (EF EPI), to provide a worldwide benchmark in adult English proficiency over time.

We have tested the English skills of nearly five million adults from all parts of the world over a period of six years (2007-2012). This year, our findings on the changes in worldwide English proficiency over this period are presented in the third edition of the EF EPI, in addition to the latest national rankings. Highlights of those findings include:

- Some Asian countries, in particular Indonesia and Vietnam, have transformed their English proficiency over the six-year period. China has also improved, although less dramatically. Japan and South Korea, despite enormous private investment, have declined slightly.
- Across the board, English language skills are improving in the BRIC countries (Brazil, Russia, India, and China). This year, India and Russia have moved ahead of China, and Brazil is closing in fast.
- While the rest of Europe is already proficient in English or steadily working towards that goal, France is on an entirely different trajectory. The seven countries with the strongest English are all small European nations, whose size compels them to adopt an international outlook.
- The Middle East and North Africa are the weakest regions in English. These oil-rich nations have staked their futures on developing knowledge economies before their oil production peaks. An exception to the region's lackluster performance is the United Arab Emirates, which has improved significantly.
- Turkey has improved the most of any nation over the six-year period. This is a positive trend, coming as the country continues to develop according to a number of economic factors.
- Poland and Hungary have made tremendous progress in learning English. These new English skills are an important step towards building the knowledge economies they aspire to have.
- Poor English remains one of the key competitive weaknesses of Latin America. More than half of the countries in the region are in the lowest EF EPI proficiency band. Brazil, Colombia, Peru, and Chile have improved, but they still lack the large base of competent English speakers necessary for a globalized workforce. Some countries in the region, including Mexico and Guatemala, have declining English proficiency.

The EF EPI third edition ranks 60 countries and territories by adult English proficiency.

Third Edition

EF ENGLISH PROFICIENCY INDEX 2013

Very High Proficiency

Rank	Country	Score
1	Sweden	68.69
2	Norway	66.60
3	Netherlands	66.19
4	Estonia	65.55
5	Denmark	65.15
6	Austria	62.66
7	Finland	62.63

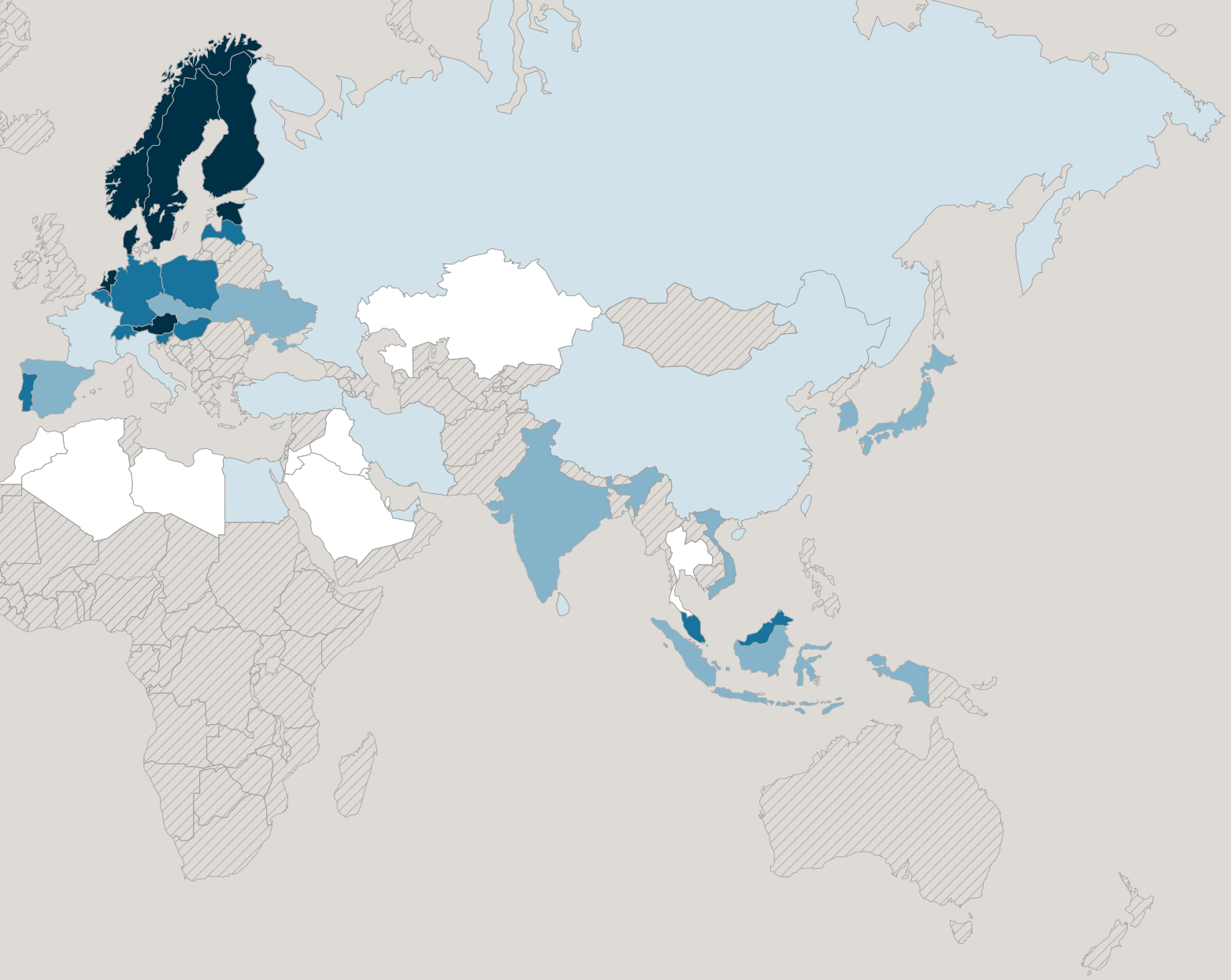
High Proficiency

Rank	Country	Score
8	Poland	62.25
9	Hungary	60.41
10	Slovenia	60.19
11	Malaysia	58.99
12	Singapore*	58.92
13	Belgium	58.74
14	Germany	58.47
15	Latvia	57.66
16	Switzerland	57.59
17	Portugal	57.52

Moderate Proficiency

Rank	Country	Score
18	Slovakia	54.58
19	Argentina	54.43
20	Czech Republic	54.40
21	India*	54.38
22	Hong Kong SAR*	53.54
23	Spain	53.51
24	South Korea	53.46
25	Indonesia	53.44
26	Japan	53.21
27	Ukraine	53.09
28	Vietnam	52.27

*Countries where English is an official language



Low Proficiency

Rank	Country	Score
29	Uruguay	51.49
30	Sri Lanka	51.47
31	Russia	51.08
32	Italy	50.97
33	Taiwan	50.95
34	China	50.77
35	France	50.53
36	United Arab Emirates	50.37
37	Costa Rica	50.23
38	Brazil	50.07
39	Peru	49.96
40	Mexico	49.91
41	Turkey	49.52
42	Iran	49.30
43	Egypt	48.89

Very Low Proficiency

Rank	Country	Score
44	Chile	48.20
45	Morocco	47.71
46	Colombia	47.07
47	Kuwait	46.97
48	Ecuador	46.90
49	Venezuela	46.44
50	Jordan	46.44
51	Qatar	45.97
52	Guatemala	45.72
53	El Salvador	45.29
54	Libya	44.65
55	Thailand	44.44
56	Panama	43.61
57	Kazakhstan	43.47
58	Algeria	43.16

Rank	Country	Score
59	Saudi Arabia	41.19
60	Iraq	38.16

Third Edition

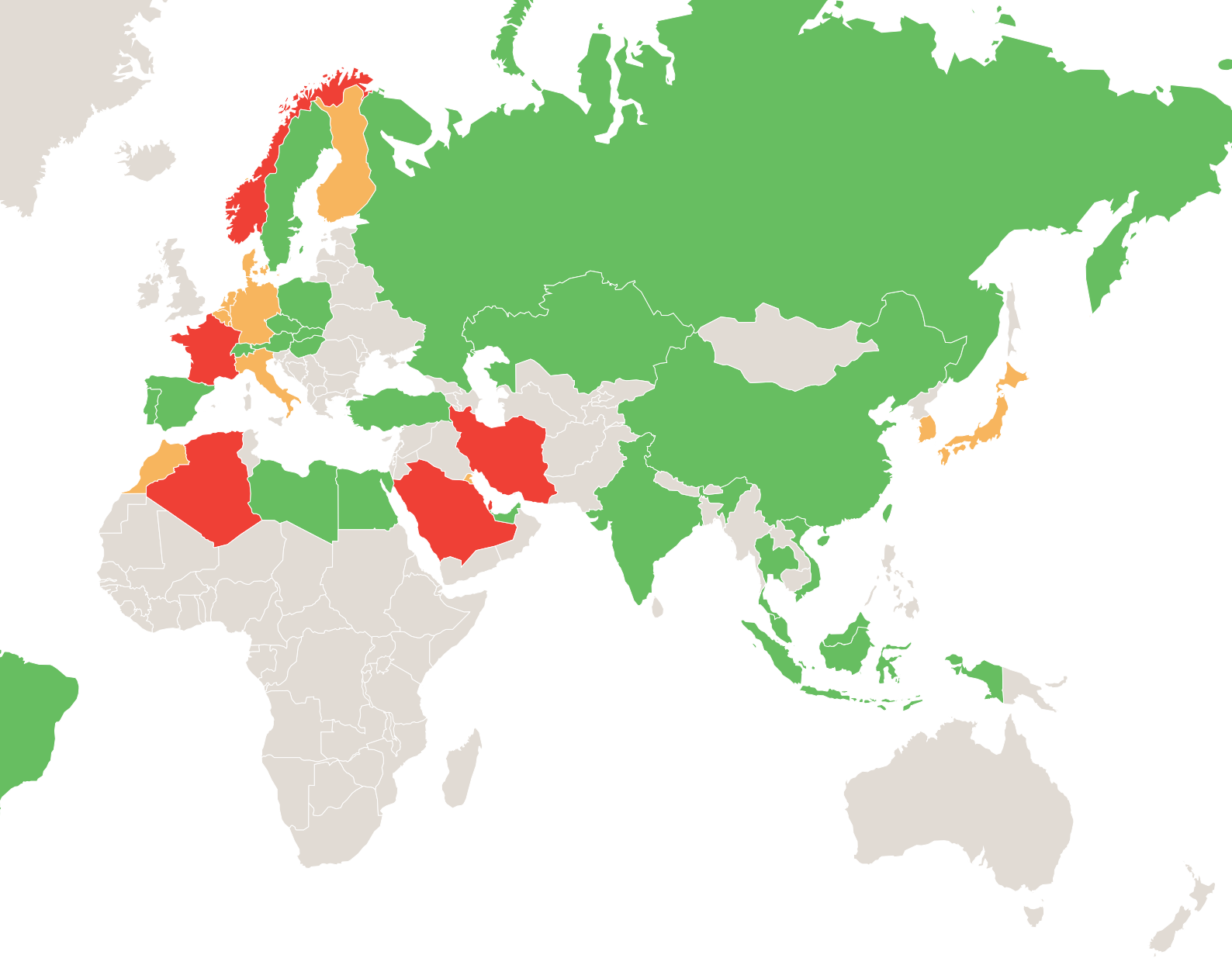
EF ENGLISH PROFICIENCY INDEX TRENDS

To determine national trends in English proficiency, we calculated the difference between countries' EF EPI first edition and third edition scores. If a country did not have a first edition score, we used its second edition score. The EF EPI first edition used test data from 2007 to 2009, the second from 2009 to 2011, and the third from 2012.

Any change greater than two points—positive or negative—indicates a significant shift in English ability. Seven countries join the EF EPI for the first time this year, so they are excluded from this map of trends.

Trending Up

Country	Trend	Country	Trend
Turkey	+11.86	Slovakia	+3.94
Kazakhstan	+11.73	Portugal	+3.90
Hungary	+9.61	Chile	+3.57
Indonesia	+8.66	Malaysia	+3.45
Vietnam	+7.95	China	+3.15
Poland	+7.63	Czech Republic	+3.09
India	+7.03	Switzerland	+2.99
Russia	+5.29	Egypt	+2.97
Peru	+5.25	Brazil	+2.80
Thailand	+5.03	Sweden	+2.43
United Arab Emirates	+4.84	Ecuador	+2.36
Spain	+4.50	Libya	+2.12
Colombia	+4.30	Taiwan	+2.02
Austria	+4.08	Venezuela	+2.01



Slight Change

Country	Trend	Country	Trend
Italy	+1.92	South Korea	-0.73
Germany	+1.83	Hong Kong	-0.90
Belgium	+1.51	Japan	-0.96
Finland	+1.38	Denmark	-1.43
Costa Rica	+1.08	Mexico	-1.57
Argentina	+0.94	Morocco	-1.69
Singapore	+0.27	Netherlands	-1.74
Panama	-0.01	Uruguay	-1.93
Kuwait	-0.04		

Trending Down

Country	Trend
Guatemala	-2.08
El Salvador	-2.36
Norway	-2.49
France	-2.63
Qatar	-2.82
Iran	-3.62
Algeria	-3.97
Saudi Arabia	-6.86

INTRODUCTION TO THE EF EPI THIRD EDITION

This third edition of the EF EPI ranks a total of 60 countries and territories, up from 44 in the first edition and 54 in the second edition.

Seven countries join the index for the first time: Estonia, Slovenia, Latvia, Ukraine, Sri Lanka, Jordan, and Iraq. Three have been removed due to insufficient data: Dominican Republic, Syria, and Pakistan.

The first two editions of the EF EPI used archival data spanning three years each from 2007 to 2009 and 2009 to 2011, respectively. Due to the overwhelming interest generated by the previous two reports, we have decided to publish the EF EPI annually from this edition forward using a single year's data. This annual report format will allow us to capture and report trends as they occur.

In this third EF EPI report, we have used test data from the 750,000 adults who took our English tests in 2012 to create the global country rankings, while at the same time analyzing the English proficiency trends that have emerged over the past six years (2007 to 2012), using test data from nearly five million adults.

In the following pages, we zoom in on ten countries and one territory to consider the contexts for the improvement in English skills in China, Russia, Spain, and Brazil; the stagnation in Hong Kong, Japan, South Korea, Italy, Germany, and Mexico; and declining English skills in France. These eleven spotlights illustrate the diversity of the challenges faced and strategies devised to train a capable workforce for today's globalized economy.

CHINA

China—Building Momentum Behind English

EF EPI Rank: #34

Trending Up

China's EF EPI score has increased by 3.15 points.

Over the past six years, China has slowly but steadily improved adult English proficiency. For the most populous country in the world, with 1.3 billion people, to make such steady progress is a major achievement. This progress reflects the enormous amount of energy and resources the Chinese government and Chinese companies, especially those with international operations, have invested in sharpening the English skills of their workforce.

China's progress in English is similar to that of the other BRIC countries, although proficiency levels across the BRICs remain moderate to low. These countries have understood that to advance from emerging to developed economies, they must invest in English training for their labor forces. The growing middle class in the BRIC countries has also been willing to spend part of their disposable income on private English lessons and study abroad programs.

Strong motivation to learn

Almost everyone in China seems to understand that in today's globalized economy, English is inextricably linked to career advancement. Local governments from Beijing to Xi'an have set mastery of 300 to 1,000 English phrases as a goal some civil servants must reach by 2015. In the private sector, an increasing number of Chinese companies are becoming multinationals, as China's outbound investment reaches an all-time high. For Chinese managers to operate teams abroad, they must be able to communicate with their foreign employees.

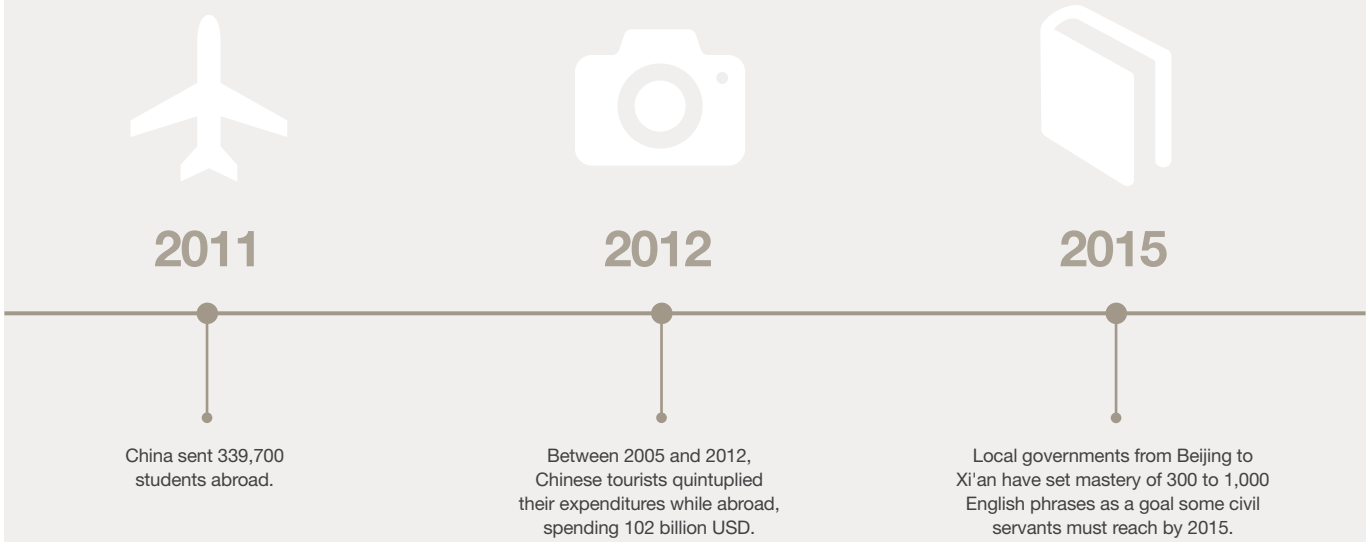
Moreover, China's new middle class are becoming world travelers. According to the United Nations World Tourism Organization, between 2005 and 2012, Chinese tourists quintupled their expenditures while abroad, spending 102 billion USD in 2012 and climbing six places to become the world's top source of tourism profits. Along with international travel, English fluency is seen as an essential part of personal development and social status for many in China's growing middle class.

Rising standards for both local and foreign English teachers

China is host to 50,000 English language schools and spends billions of U.S. dollars on English language learning every year. As spending rises and the market matures, the quality of English language instruction is improving.

China began to recruit foreign English teachers after opening up in the 1970s, and since then, there has been an explosion in the number of native English-speaking teachers. Few of the first foreign teachers had TEFL certification, and some had never taught before. Now, the visa application process requires that they have at least TEFL certification and some

China's English level goes up as more Chinese students and travelers head abroad



Last year, China topped the world as the number one source of tourism profits and overseas students. These trends correlate with the rise in Chinese adults' English levels. Looking ahead, local governments within China are setting higher English proficiency standards for civil servants.

teaching experience. At more selective institutions, foreign teachers must also hold Master's degrees. At the same time, local English teachers now have significantly higher levels of English, and school systems have invested heavily in better training for their existing teachers.

Professor Xia Jimei of Sun Yat-sen University, former Vice Chair of China's National Advisory Committee for Collegiate Foreign Language Teaching, commented, "Since I am a certified teacher trainer in China, I can tell you that the Ministry of Education and all levels of government have paid great attention to on-the-job teacher training with all kinds of funded programs and projects in order to promote professional development for teachers. Also, syllabi, teaching materials, and classroom methodologies have been updated and reformed under the supervision of experts. We are following internationalized standards in a glocalized [global + local] context."

More students learning in English

More and more international schools in cities such as Beijing, Shanghai, and Guangzhou are offering the International Baccalaureate Diploma Program or Advanced Placement courses. At these schools, instruction is usually delivered in English to prepare students for admissions to universities in English-speaking countries.

In 2011, China sent 339,700 students abroad, beating India to become the world's number one source of overseas students. More than half of these Chinese students traveled to the U.S., the U.K., and Australia, and 93% were self-funded.

China can celebrate its progress, but its average adult English proficiency is still low, outperforming only Thailand and Kazakhstan within Asia. In 2007, Indonesia, Vietnam, and fellow BRIC countries India and Russia were all behind China, but they have since pulled ahead. To facilitate further economic growth and render it more competitive with its neighbors and other BRIC countries, China needs to continue improving English teaching in public schools, training teachers to use communicative teaching methods, and revising high-stakes exams to include assessment of oral skills.

China became the world's top source of overseas students in 2011. More than half of these Chinese students traveled to the U.S., the U.K., and Australia.

HONG KONG

Hong Kong—English level drops slightly as Mandarin rises

EF EPI Rank: #22

Slight Decline

Hong Kong's EF EPI score has decreased by 0.90 points.

Between 2007 and 2012, Hong Kong's level of English fell slightly. In this year's EF EPI, Hong Kong ranks ten places behind its main rival, Singapore. A recent article in the *South China Morning Post* lamented, "While Hong Kong has stressed bilingualism as a key goal, the city falls far behind Singapore in English literacy, with no remedy in sight."

In the meantime, its Southeast Asian neighbors and mainland China are catching up. Vietnam and Indonesia have improved dramatically—about eight points each—and are now in the same proficiency band as Hong Kong. Though mainland China has not advanced as quickly, it has made steady progress in the past six years.

Despite all the effort and money the Hong Kong government has put into teaching English, it has not yet seen returns on its investments. Possible explanations include the adoption of mother tongue education and the elevated status of Mandarin.

From bilingualism to trilingualism

For more than 130 years, English was the only official language in Hong Kong. Cantonese was not added until 1974, although the vast majority spoke Cantonese at home. English was the language of government, education, academia, and law. Recognizing English as an elite language, parents who could afford it sent their children to the U.K. and other English-speaking countries to study.

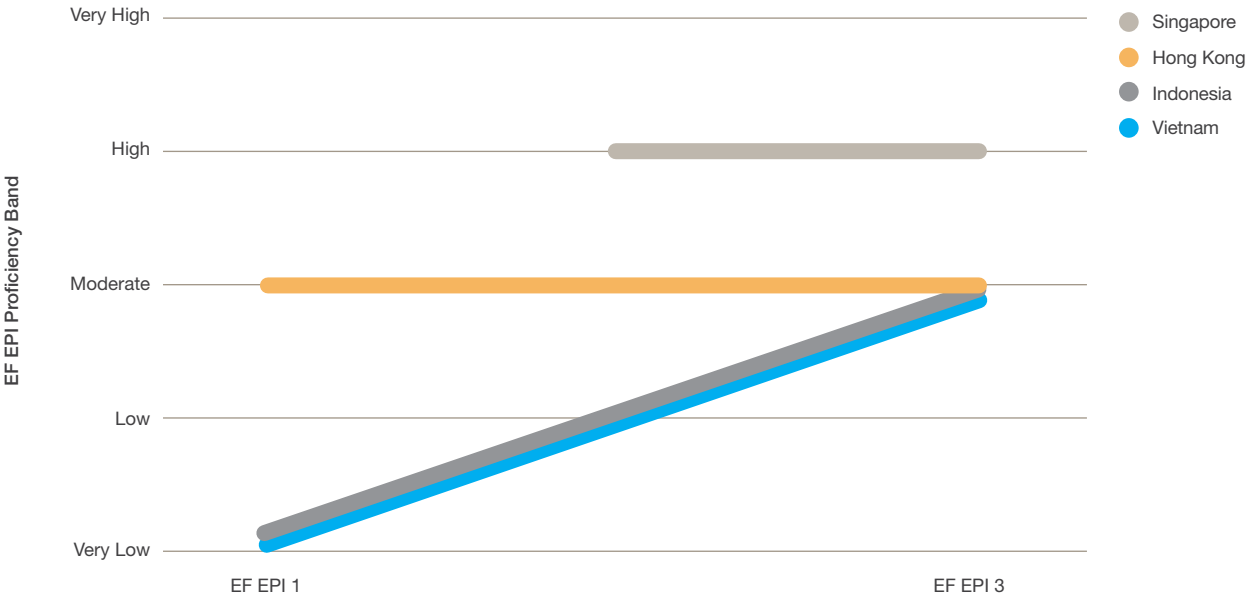
When Hong Kong was reunified with mainland China in 1997, Hong Kong's Chief Executive announced the government's new biliterate (Chinese and English) and trilingual (Cantonese, Mandarin, and English) policy. His administration promptly moved to promote Mandarin education in the territory, adding it as a compulsory subject in schools and setting up a Mandarin channel on the government radio station.

Researchers, educators, and employers have observed that since the handover, students' and graduates' overall English proficiency level has significantly declined. Professor Danny Leung of the English Department at the Chinese University of Hong Kong commented, "The overall competitiveness of our 'fresh' graduates in using English as a second language has been going downhill since the handover."

Return to mother tongue education

In 1997, a few months before the handover, the Hong Kong government mandated that some schools switch from using English as the medium of instruction to using Chinese. As a result of the policy, the number of schools where Chinese was the medium of instruction went from 12% under British rule to 70% in 1998. Official documents in Hong Kong refer to "Chinese medium of instruction" without distinguishing between Cantonese and Mandarin, so it is not possible to know how many schools are using the two languages, or how that usage is changing over time.

Stagnation in Hong Kong



Hong Kong continues to trail its rival Singapore, as other Asian countries such as Indonesia and Vietnam are quickly catching up.

Scholars have cited this return to mother tongue education as problematic for the teaching of English in Hong Kong. "The compulsory Chinese medium instruction policy is in effect weakening English language learning in Hong Kong," concluded Professor Anita Poon of Hong Kong Baptist University's Department of Education Studies.

Mandarin's rising importance

With mainland China as Hong Kong's top trade partner, accounting for half of its total trade in 2012, fluency in Mandarin is now as important as fluency in English for many professional positions. The influx of mainland tourists has compelled the retail and service industries to hire employees who can communicate with these guests.

To accommodate these economic realities, the Hong Kong government adopted its trilingual policy in 1997 and has invested millions in improving its workforce's Mandarin skills. As a result, the number of Hong Kong residents who reported that they can speak Mandarin increased from 33% in 2001 to 48% in 2011.

Though the rising importance of Mandarin has not devalued English in the Hong Kong job market, it follows logically that when the focus shifts from a single foreign language to two, there is less time allocated to English study than previously, and proficiency levels may suffer as a result.

Government efforts to improve English

The Standing Committee on Language Education and Research (SCOLAR) allocates millions of U.S. dollars every year for language enhancement initiatives. In 2000, it passed a 6.4 million USD budget for the Workplace English Campaign, which provided subsidies for 30,000 employees to attend English courses and take proficiency exams.

Other key SCOLAR initiatives include toughening standards for English language teachers and paying for a native English-speaking teacher for every secondary school and some primary schools. Despite these investments, Hong Kong adults' English level has not yet improved.

Hong Kong presents itself as an international hub for business, trade, and finance. English is today's language of global commerce. If Hong Kong's English proficiency cannot keep pace with that of its neighbors, it may be losing its competitive advantage.

The number of Hong Kong schools that used Chinese as the medium of instruction rose from 12% under British rule to 70% in 1998.

JAPAN

Japan—Torn between tradition and globalization

EF EPI Rank: #26

Slight Decline

Japan's EF EPI score has decreased by 0.96 points.

In the past six years, Japanese adults have not improved their English. If anything, their skills have declined slightly. During the same period, other Asian countries, most notably Indonesia and Vietnam, have made enormous progress. Despite being a far wealthier and more developed country, Japan is struggling to teach its students English for use in a competitive global economy.

Non-communicative methods

The Japanese education system does not emphasize English communication skills. Teacher-student relationships are traditional, with most classes delivered as lectures. While this may work in other subjects, in English class it means that students have no opportunity to practice or apply new skills. In addition, English teachers most often deliver their lectures in Japanese. In a 2011 report, only 20% of English teachers at public high schools in Japan said they taught oral communication in English.

Japanese students focus their time in secondary school preparing for competitive university entrance exams. Many of these exams do not include a spoken English component. Middle and high school students are also encouraged to test their English level using standardized exams. The most common English exam in Japan is the Eiken, taken by 2.3 million people in 2011. Although it includes a speaking section, only more advanced students take it, and they must first pass a grammar test in order to be tested on spoken English. In all cases, the majority of a candidate's score is determined by grammar, vocabulary, and translation questions.

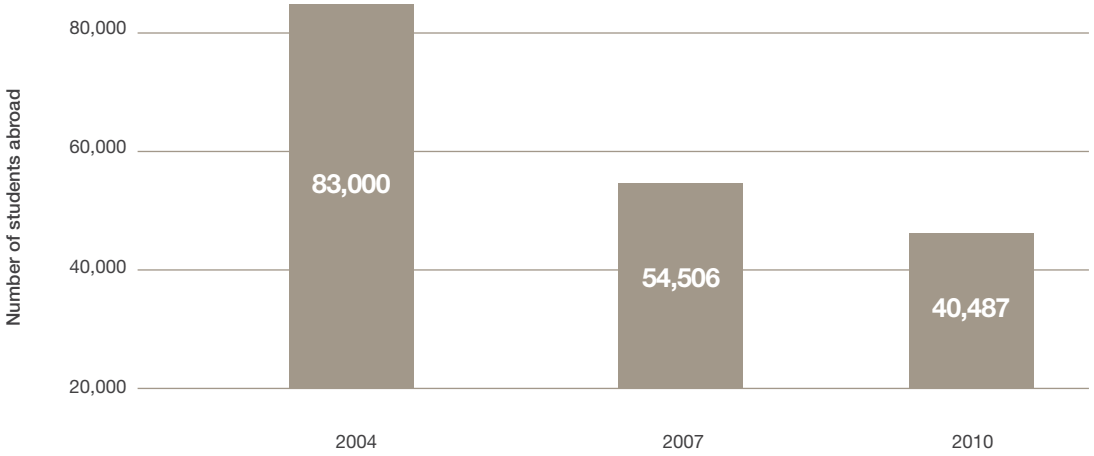
Compounding the lack of emphasis on communication skills in school, Japanese people have little exposure to English in daily life unless they seek it out via the internet. Proportionally, very few foreigners live in Japan and emigration levels are low. The majority of older Japanese people travel abroad in tour groups, in which exposure to the local language is minimal.

Fewer students abroad

Japanese companies suffer from the lack of English skills among their employees. With the Japanese population declining and a troubled economy, Japanese companies need to expand overseas and develop international partnerships to survive. A few Japanese companies, including Rakuten and Uniqlo, have made English a corporate language; however, these are the exceptions.

Japan's closed corporate culture has wider impacts on society. The past decade has seen a steep decline in Japanese students studying abroad. At American universities, the most popular destination for Japanese students overseas, just 19,966 Japanese students were registered in 2011-2012, half the number from a decade ago. American universities had 72,295 students from South Korea that year, although South Korea has less than half of Japan's population.

Number of Japanese students abroad drops by half



Source: Institute of International Education

The economic stagnation in Japan and a closed corporate job market have prevented many Japanese students from studying abroad. As the number of students going abroad drops, English proficiency has also suffered. The Education Ministry has pledged to double the funding for study abroad scholarships next year.

There are many explanations given for this decline in Japanese students studying abroad, from a rise in insularity among young people to the volatility of the yen in world markets. One compelling argument is that Japanese students who go abroad cannot find work when they return to Japan. Instead of seeing the economic value of ambitious, bilingual graduates, some Japanese companies hesitate to hire culturally diverse junior staff who may not be inclined to adopt traditional corporate roles. A survey of 1,000 Japanese companies in 2011 found that less than a quarter planned to hire any Japanese applicants who had studied abroad. “We’re cautious because we emphasize continuity and long-term commitment to the company,” said Keiichi Hotta, a recruiter for the giant Japanese financial bank Tokyo-Mitsubishi.

Minor reforms

The current government has expressed interest in improving Japan’s English level, but has so far implemented no significant reforms. It expanded English instruction to grades five and six in 2011, but the initiative only aimed to standardize instruction that was already given in 97% of primary schools. “Singing English songs and repeating simple words in English for an hour once a week will not be enough to equip students with proficiency in English,” said Professor Kumiko Torikai of the Graduate School of Intercultural Communication at Rikkyo University.

Another proposed reform to require a minimum TOEFL score for all university graduates and some types of new public servants has been criticized as unrealistic if communicative teaching methods are not used in schools. The TOEFL weighs English speaking ability heavily, and Japan’s current TOEFL scores are some of the lowest in Asia.

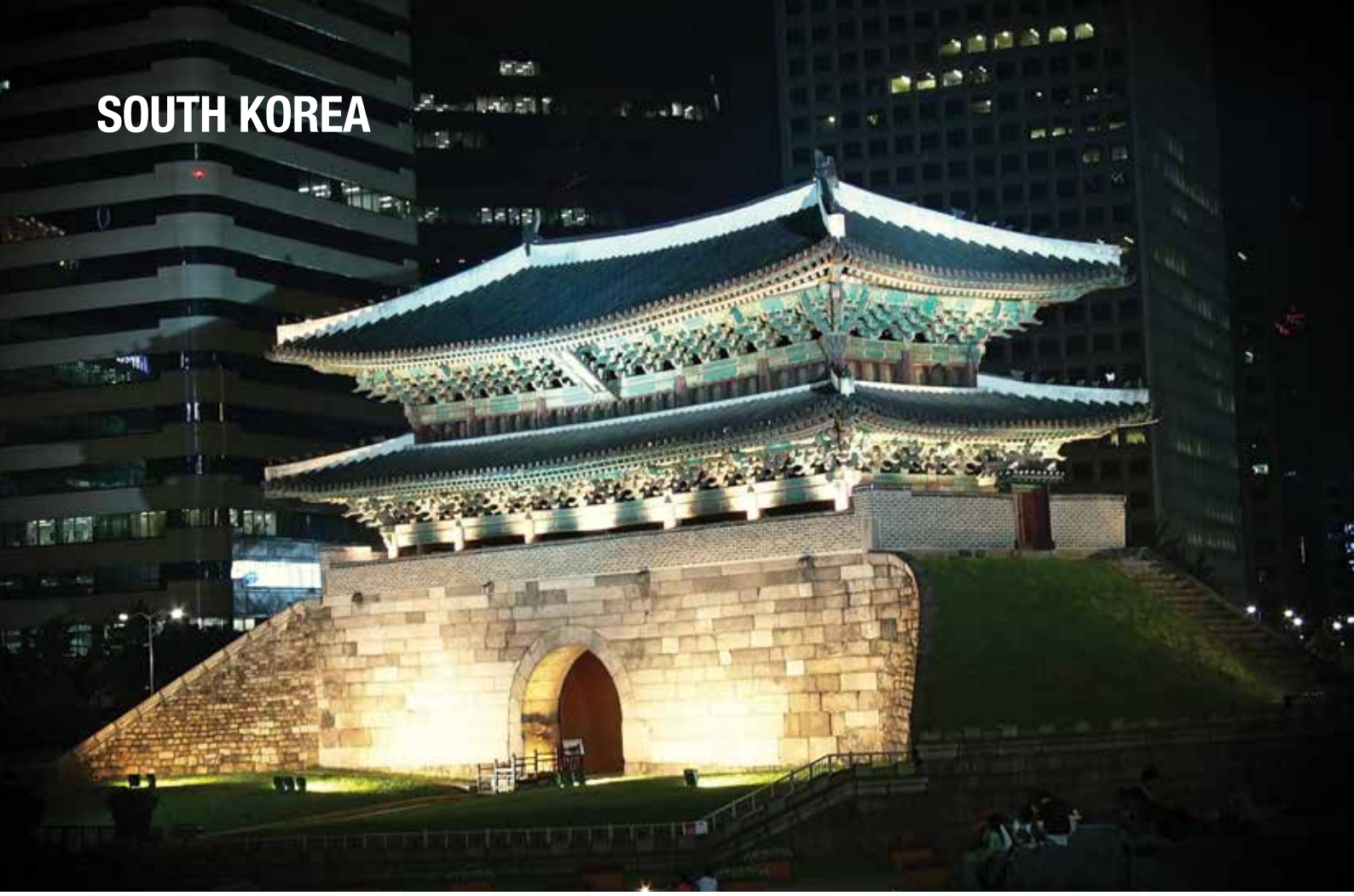
Finding teachers qualified to teach students to speak English is a challenge. Since the late 1980’s, Japan has hired native English speakers to assist Japanese teachers through the JET program, which at its peak in 2002 brought 6,300 English speakers to Japan. The program has since been scaled back, but the government recently proposed investing more heavily in hiring native speaking assistant language teachers, despite the lack of evidence demonstrating the program’s efficacy.

The same might be said of the massive English conversation school industry. These chains of private English schools, called Eikaiwa, are extremely popular among both professionals and parents. In 2002, the industry's annual turnover was 6.7 billion USD. Although the recent bankruptcies of two of the largest Eikaiwa chains have shaken up the industry, private investment in English courses in Japan remains high.

Japan finds itself torn between maintaining traditions and participating in an increasingly globalized world. On the one hand, it is aware that in order to remain economically competitive it must open up, instigate reforms, and embrace globalization, including communicating in English. On the other, it is more comfortable sticking to what has worked in the past. It is not yet clear which path Japan will choose, or whether the selection of Tokyo for the 2020 Olympics will have any lasting impact on people’s motivation to learn English. For the time being, the level of English proficiency in Japan shows no signs of improvement.

Only 20% of Japan's English teachers at public high schools said that they taught oral communication skills in English.

SOUTH KOREA



South Korea—Massive investment with limited return

EF EPI Rank: #24

↙ Slight Decline

South Korea's EF EPI score has decreased by 0.73 points.

The South Korean government and its people invest more in English education than nearly any other country in the world; thus, English proficiency is often deemed a "national obsession." South Korea spends nearly twice the amount China does on private English lessons, despite the fact that China has a population 27 times larger.

Beginning as early as kindergarten, Korean students attend private English tutorials several hours a week. According to one newspaper's estimate, Koreans spend an average of 20,000 hours between primary school and university learning English, including both school instruction time and private tutoring.

With the vast amounts of time, money, and energy Koreans pour into mastering English, it is surprising that South Korea's proficiency level dropped slightly between 2007 and 2012. Ranked fifth among Asian countries, Korean adults have moderate English proficiency, but they have not improved in the last six years.

Extensive reform efforts

In Korea the question of how to enhance students' English competence—in particular their communicative abilities—has rankled policymakers and educators, turning English education reform into a political sticking point.

Recognizing the value of English for economic growth, in 2008 Korea's president announced an aggressive plan to have schools teach all subjects in English by 2010. His proposal was quickly shelved due to strong, widespread dissent from educators and parents. Instead, the Ministry of Education called for English teachers to be trained and certified by a new Teaching English in English (TEE) program.

Thousands of teachers have gone through the six-month intensive program, and some report that TEE has inspired them to use more English in the classroom and plan more student-centered activities. However, TEE has been heavily criticized by TEFL experts and TEE trainers who claim that the standard for certification is too low, and that trainers are encouraged to pass more teachers than they should because teachers who fail have to repay training costs.

Professor Shin Sang-keun of Ewha Womans University told the *Korea Herald*: "Despite tremendous investment and effort, TEE has not met expectations." Although training English teachers is a key component to successful English education reform, the quality of the training program itself is central to that equation.

South Korea sees little return on vast investments in English education

Trending Up

Country	Trend
Indonesia	+8.66
Vietnam	+7.95
India*	+7.03
Thailand	+5.03
Malaysia	+3.45
China	+3.15
Taiwan	+2.02

Slight Change

Country	Trend
Singapore*	+0.27
South Korea	-0.73
Hong Kong*	-0.90
Japan	-0.96

Most wealthy Asian countries, including South Korea, have not significantly improved their English level, while the rest of Asia has made dramatic gains.

*Countries where English is an official language

Shifting away from native English-speaking teachers

Since 1995, Korean public schools have hired teachers from English-speaking countries with the goal of boosting students' conversation skills. The number of native English-speaking teachers grew from 95 in the first year to 8,798 in 2011.

However, faced with budgetary constraints, some cities are reconsidering the hiring of foreign teachers and instead investing in more English training for their local teachers. Seoul has announced it will completely phase out the hiring of native English-speaking teachers in non-specialized schools by 2014.

The emergence of the new National English Ability Test

The most frequent criticism of Korea's language teaching is its focus on memorization and grammar. Students graduate with technical skills, but many lack the ability to communicate with others in English. Recognizing that high stakes exams often determine the priorities of both teachers and students, the Korean Ministry of Education has invested about 26 million USD over the past four years to create the National English Ability Test (NEAT). The Ministry's goals for NEAT include (1) lowering parents' spending at cram schools, (2) retooling the curriculum to emphasize productive skills, and (3) decreasing the demand for foreign tests such as TOEFL and TOEIC.

The Ministry proposed adopting NEAT as the replacement for the current English section of the Korean college entrance exam. The current English section only assesses reading and listening, but NEAT would include speaking and writing as well. Local teachers have said that they do not teach English communication skills because the college entrance exam only tests receptive skills.

According to a 2011 survey, a clear majority of stakeholder groups (parents, teachers, and education specialists) believed that NEAT would increase the amount of instructional time dedicated to communicative skills, thus enhancing students' speaking and writing abilities. However, critics protested that NEAT was too unpredictable in terms of how students will be tested in the productive skills, and that students and teachers needed more time and information to prepare for a new exam.

The Ministry announced this year that NEAT will not be incorporated into the college entrance exams. NEAT will serve other purposes, which are to be defined in the future.

South Korea has seen disappointing returns on its vast investments in English language learning. Few are optimistic about any significant improvements, given a traditional system that forces students to drill and memorize. The Korean government and education reformers have acknowledged this problem and have worked to improve English instruction so far with limited results. Perhaps even more innovative solutions are needed to revamp English education in South Korea.

Koreans spend an average of 20,000 hours between primary school and university learning English.

RUSSIA

Russia—Embracing English and becoming more international

EF EPI Rank: #31

Trending Up

Russia's EF EPI score has increased by 5.29 points.

Six years ago, Russia's English skills were weaker than any European country's. Today Russia has pulled ahead of Italy and France, ranking 31st out of 60. But despite this improvement, Russia's adult English skills remain low. Among BRIC countries, Russia places second after India.

Russia's low level of English proficiency can largely be explained by its history. During the Soviet period, few Russians learned English. Most were not permitted to travel outside of the Soviet Union; English-speaking foreigners were few; German was the preferred foreign language, and Russian was the lingua franca of all Soviet states. "For almost a century, most of the population had been confined to the republics of the former Soviet Union, or, at best the Soviet bloc," wrote Dr. Galina Telegina of Tyumen State University and Dr. Hermann Schwengel of the University of Freiburg.

Since the dissolution of the Soviet Union, despite lingering nationalist sentiments, the Kremlin has slowly moved towards globalization. Without competent English speakers, Russia found itself unable to participate in the global market, and in the 21st century, isolationism is economically impossible. Russian adults' progress in English proficiency can be attributed, at least in part, to the government's internationalization efforts.

For the younger generation, changing lifestyles, the internet, and increased international travel have also encouraged English study. Advancements in technology have produced innovative approaches to language learning and given greater access to people in rural areas.

The world arrives in Russia

Russia has been unusually successful in attracting the world's major sporting events. This summer, it hosted the World University Games and the World Athletics Championships; in 2014, it will host the XXII Olympic Winter Games and XI Paralympic Winter Games in Sochi, and in 2018, the FIFA World Cup. These events have mobilized hundreds of thousands of Russians to learn English, subsidized by their local governments.

At the 2007 International Olympic Committee Session in Guatemala, President Vladimir Putin delivered a surprise speech in English. Though other heads of state have used foreign languages to win the hearts of audiences abroad, when President Putin became the highest-ranking Russian leader to break the Russian-only rule, it became clear that speaking English was not only acceptable, it was expected.

The Russian Olympic Committee President Alexander Zhukov agreed: "Our Olympians need English to travel to training camps, communicate with colleagues, and give interviews to foreign press." Ahead of the Sochi 2014 Games, 700 Russian Olympians are receiving subsidized English lessons, as well as 70,000 Olympic staff, volunteers, referees, and contractors. In addition,

Russia improves English proficiency as it prepares to host international games

As athletes throughout the world converge in Russia for some of sport's most important games, Russia mobilizes its citizens to learn English through programs subsidized by local governments.

the Sochi city administration initiated the "Word of the Day" project in 2012 to reach a wider public. Each day in Sochi for 662 days, a new English word or phrase is introduced in a coordinated fashion over the radio, in public buildings, at supermarkets, and on buses.

New government language policies

The Russian government—both federal and local—is making a concerted effort to boost the country's English skills. At the national level, the Economic Development Ministry set a goal to have at least 20% of federal officials fluent in a foreign language. The Ministry proposed in 2011 that English fluency should be a job requirement for new civil servants by 2020. To meet this goal, the Ministry has recommended sending qualified officials abroad to state-sponsored language programs.

On the local level, the Republic of Tatarstan stands out for its serious investments in English language programs for teachers and officials. In 2011, Tatarstan President Rustam Minnikhanov said, "If teachers have excellent level of English, then their students will too. As for officials, they must speak English in the modern world. I think that every leader must speak an international language. We all have to study English. It is absolutely necessary."

Globalization of Russian universities

Currently, no Russian university is included in the top 200 universities of the Times Higher Education or the QS World University Rankings. Unhappy with this statistic, President Putin declared in 2012 that Russia should have at least five universities within the top 100 by 2020.

The *Moscow Times* reported that some critics called these rankings unfair to Russia, as they "rely on a narrow Anglo-American model for university education and they reward research published in the English language." Nevertheless, the Kremlin and top Russian universities, including the highest-ranked Moscow State University, have been clear about their desire to compete in the global marketplace of ideas.

From government to universities, those with power to implement significant reforms in English education seem determined to produce better speakers of English for a more international Russia. The average level of English in the country is still low, and only time will tell how fast Russians can improve their English, but it is clear that English proficiency is a priority for Russia as it strives for economic development.

Ahead of the Sochi 2014 Winter Olympics, 700 Russian athletes and 70,000 volunteers and employees are receiving subsidized English lessons.

FRANCE

English in France—Ambivalence and decline

EF EPI Rank: #35

Trending Down

France's EF EPI score has decreased by 2.63 points.

Ranked 35th out of 60 in this year's EF EPI, France's English proficiency skills are declining, according to data gathered on over 150,000 French adults between 2007 and 2012. France is one of only eight countries whose proficiency scores have dropped by more than two points, although in absolute terms the decline is slight. What makes the situation more remarkable is that most of Europe has either improved or already demonstrates consistently high English proficiency. France currently has the weakest English skills in Europe.

Our findings are in line with other research on English proficiency trends in France. It appears that the declining level of English ability in adults is led by young people, who are leaving school with weaker English than ever before. Examining English proficiency trends in teenagers over the past 15 years helps us understand the evolution in adult skill levels, and points to how the French school system is contributing to the overall decline.

Declining skills among teenagers

An English test administered by a consortium of educators in schools across Europe in 1996 and again in 2002 found declining skill levels in French teenagers. By 2002, French teens were in last position among the seven countries tested. In response to this worrying finding, in 2002, the French Education Ministry implemented a major education reform in foreign language instruction. Despite the reform, between 2004 and 2010, English skill levels among teens declined further in all areas, according to tests administered by the French Education Ministry.

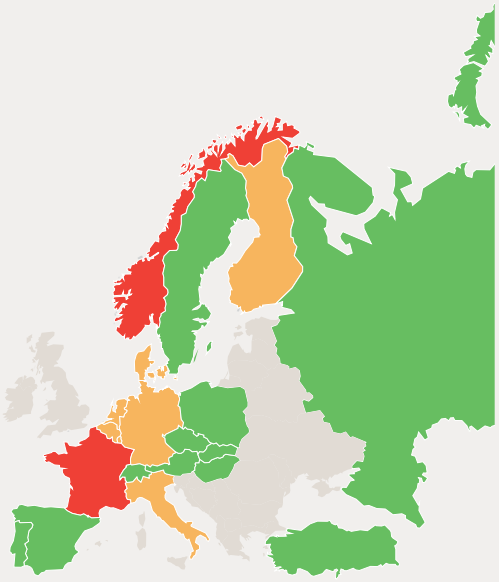
To date, there are no signs of progress. In 2012, for the first time, the European Commission published the results of foreign language tests given to 15-year-olds in 12 European countries. They found that French teens had weaker results than students of any other country tested. These children started studying English at the age of seven. Yet, after eight years of instruction, over 70% of them were at a beginner or pre-beginner level (A1 or pre-A1).

These French teenagers, as they graduate and enter the workforce, do so with slightly poorer English skills than prior French graduates, and markedly poorer skills than most other Europeans.

Low exposure to English

This decline cannot be attributed to the most obvious sources. By the time they have completed school, most French graduates have spent as much time studying English as other Europeans. English teachers in France have similar qualifications to those in most countries. English teacher salaries are in line with the rest of Europe. When polled, French adults are as likely as other Europeans to say that English is important for them and for their children.

France falls behind other European countries



Trending Up

Country	Trend
Hungary	+9.61
Poland	+7.63
Spain	+4.50
Austria	+4.08
Slovakia	+3.94
Portugal	+3.90
Czech Republic	+3.09
Switzerland	+2.99
Sweden	+2.43

Slight Change

Country	Trend
Italy	+1.92
Germany	+1.83
Belgium	+1.51
Finland	+1.38
Denmark	-1.43
Netherlands	-1.74

Trending Down

Country	Trend
Norway	-2.49
France	-2.63

While most of Europe has either improved or already demonstrates consistently high English proficiency, France has experienced a decline and currently ranks last within its region.

There are, however, some indicators of structural deficiencies. Perhaps the most significant: French students report lower levels of exposure to English in everyday life than any other Europeans polled. Exposure to a foreign language has been found repeatedly to be one of the strongest contributors to increased fluency. However, usage of foreign languages in the media is restricted by law in France. When polled by the European Commission, French students reported little or no exposure to TV, movies, newspapers, magazines, and web content in English.

In addition, 89% of French students said in 2012 that a language lab was not available at their school, a higher percentage than in any other European country. Modern technology allows more exposure to English than ever before and facilitates direct interaction with native English speakers, but France has yet to take advantage of it.

Historic and cultural context

The underlying question is why French society does not take the necessary steps to improve the country's English skills. The answers are myriad, but all of them are linked to history and culture. In France, English is still often seen as a threat to French.

A recent controversy about the usage of English as a language of instruction in French universities illustrates the fraught relationship between French society and the English language. In the spring of 2013, the French Minister of Higher Education proposed a revision to university governance laws to allow some courses to be taught in English. A national debate ensued.

Conservative intellectuals called the change "a drive towards self-destruction." An eminent group of French scientists rebutted, "The voices that are raised in the name of the defense of the French language seem to us totally out of touch with the current reality of universities, and also seriously counterproductive concerning the interests of France and French-speaking nations."

The law was eventually passed, but the argument that won the day was not the increased employability of French graduates if they mastered English. The French Minister of Higher Education did not make that case. Instead, lawmakers agreed that English instruction would open French universities to more foreign students. Having more foreign graduates from French universities helps to promote French culture, language, and thought around the world, in line with national policies that aggressively promote the French language both at home and in international bodies like the United Nations.

Research in the past two decades has shown that students are leaving French schools with poor English and that reforms intended to improve their skills are not working. Our research mirrors these findings, as we see these graduates bringing down the average English proficiency level of the French workforce. With debate in France still centered on whether or not English is a threat to French, most of Europe has already embraced English as an international tool. France, however, is on a strikingly different trajectory.

Even after eight years of English instruction, over 70% of French students are at a beginner or pre-beginner level.

GERMANY

Germany—International attitudes and good-enough English

EF EPI Rank: #14

↗ Slight Increase

Germany's EF EPI score has increased by 1.83 points.

Germany's English skills have improved slightly in the past six years, maintaining the country's position in the High Proficiency band. German schools are doing an adequate job teaching English communication skills to students, and adults in Germany on the whole appear satisfied with their level of English, as judged by the lack of public debate about English skills.

Germany is a country with an international outlook, European trading partners, and very high levels of tourism abroad. Immigration is common in Germany, and German cities are multi-cultural and multi-lingual. This connectedness to the rest of the world makes both English and other foreign languages practical tools for Germans. It is this pragmatic approach to mastering foreign languages that best defines the German outlook.

English learning in Germany

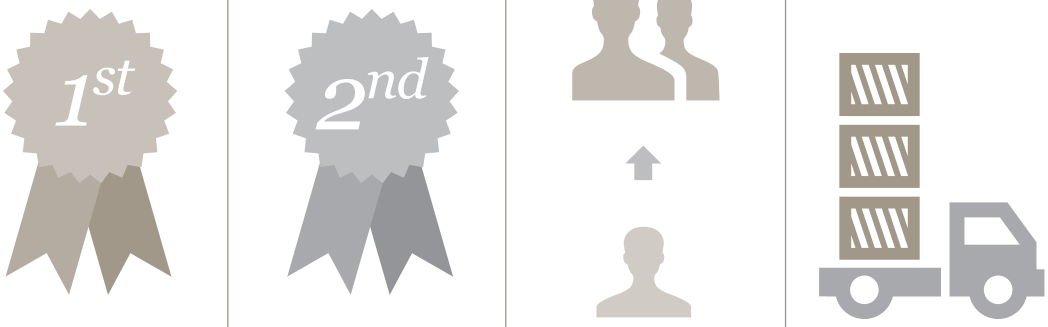
In German schools, decisions about the introduction of English, hours of instruction, and curriculum are made regionally. Most regions teach English from the third year of primary school. From the start, the emphasis is firmly on using English for communication rather than on learning grammar. Every student is expected to leave school able to use English for basic purposes. No major reforms around English learning in schools have been implemented in the past decade.

Starting from fourth grade, German students are divided into one of three education tracks. The number of hours spent learning English is different in each track, although English is part of every degree program. In the trade and professional tracks, the emphasis is on practical skills for the workplace. In the academic track, students spend time on more theoretical subjects and more advanced foreign language study. Only the academic track gives access to university.

Satisfaction with current English skills

Individual attitudes towards English vary, but the most commonly shared feeling in Germany is that the current level of English is good enough. A recent study pointing out that business English skills were weak in Germany was poorly received, with many commentators criticizing the premise that all Germans need to speak English at a high level. Some annoyance at the frequent borrowing of English words in German is a recurring theme, but in general Germans accept the utility of English in international settings. For most corporate jobs, English is a requirement rather than a distinguishing mark on a CV.

Outward-facing Germany embraces foreign languages



#1 in outbound tourist trade in Europe

#2 study-abroad destination for European students

Number of German students studying abroad has more than doubled in the last decade

High exports per capita

Germany has an unusually international outlook, even when compared with the rest of Europe. It can boast a workforce proficient in English, thanks to an effective education system and society-wide acceptance of English as a necessary skill. Other foreign languages are also valued, in particular French and Spanish, and increasingly, Mandarin.

A culture of internationalism

Germany has an unusually international outlook, even when compared with the rest of Europe. It has the second-largest outbound tourist trade in the world, valued at over 80 billion USD per year, despite being only the world's 14th most populous country. Germans spend far more time abroad than other Europeans, accounting for 29% of all the nights Europeans spent abroad in 2012.

In Germany, English is not the only important foreign language. French is highly valued for cultural, historic, and economic reasons. France is Germany's largest trading partner, and only two of Germany's top five trading partners are English-speaking countries. Spanish, and increasingly Mandarin, are popular at the high-school and university level.

"For us, know-how is very important," said Claudius D. Habbich, a division head at the German Academic Exchange Service (DAAD). "For the country to survive economically and politically we need to have citizens who are experts in many regions and who have the appropriate language skills."

German university students are remarkably mobile, with approximately one third spending some time abroad before they graduate. The trend towards study abroad has intensified in the last decade: the number of German students studying in foreign countries more than doubled, from 52,000 in 2000 to 115,000 in 2009. The U.S. and the U.K. are among the top five study-abroad destinations for German students, as well as the Netherlands, where university programs in English are common.

University courses and even degree programs in English are increasingly common in Germany as well. German universities attract more than 250,000 foreign students every year, surpassing every other country in Europe except the U.K. in the number of foreign students enrolled in its university programs. German universities are extremely inexpensive and academically well-regarded, with more than a dozen ranking consistently in the top 200 universities in the world. Germany's strength in science and engineering, as well as an attractive job market, make it all the more appealing to foreign students.

Germany is an outward-facing, international country with a workforce proficient in English, thanks to an effective education system and society-wide acceptance of English as a necessary skill. At present, it doesn't appear that Germany has a desire to raise the average adult English proficiency level, instead focusing on encouraging more students to spend time abroad and develop other language skills in addition to English.

German university students tend to be mobile, with about one-third spending some time abroad before graduation.

ITALY

Italy—English proficiency developing, but slowly

EF EPI Rank: #32

↗ Slight Increase

Italy's EF EPI score has increased by 1.92 points.

Italy's level of English has improved slightly over the past six years, but not significantly enough for it to move out of the Low Proficiency band or progress in relation to other European countries. Italy's English skills remain among the weakest in Europe.

Although the low level of English is recognized as a concern by many in Italy, none of the reforms in the past decade have succeeded in addressing the issue. An unstable government, aging population, and challenging economic times make change all the more difficult. Many are calling for Italy to accelerate its transition to a more knowledge-based economy in order to get out of its current stagnation. Developing proficient English will be a key element for that transition to succeed.

A disconnected university system

Italian universities have been widely criticized as disconnected from the workplace and overly bureaucratic. Insufficient graduates in the Science, Technology, Engineering, and Mathematics (STEM) subjects, low levels of hands-on training, and a lack of professional English skills are cited as symptoms of this disconnect. Although Italy's higher education system produces nearly 300,000 graduates a year, on average, college graduates earn only 9% more than high school graduates, while in other industrialized countries, the average salary difference is 37%.

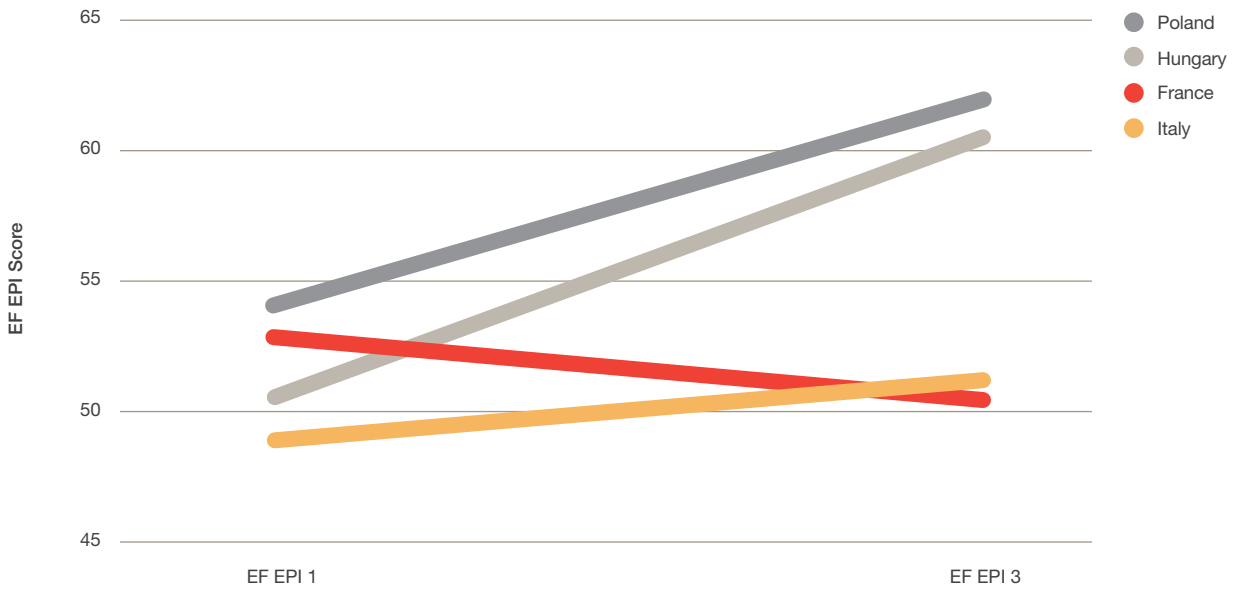
There is strong variation in Italy between the North, where unemployment of 15- to 25-year-olds is 25%, and the South, where youth unemployment levels reach 45%.

Many universities are exploring reforms, including introducing courses and degree programs in English. This year the Politecnico di Milano, one of Italy's leading universities, announced that from 2014 most of its degree courses will be taught and assessed entirely in English rather than Italian. Professor Giovanni Azzone, Politecnico di Milano's Rector, highlighted how vital this decision is for his university: "At present, you have two choices. You can stay isolated in your own country—which is not realistic in a global world—or you can open up and be able to work in an international context. Either our university will understand that or else our country will be isolated, which is unbearable for a country like Italy." Attracting more foreign students is one of the university's goals. Just 3.5% of university students in Italy are foreign, compared to over 10% in Germany.

Difficult transition to a knowledge-based economy

The stagnating economic climate, rigid labor laws, and stifling bureaucracy make for a challenging job market for young graduates in Italy. Political instability has prevented attempts to make the Italian economy

Italy made progress in English proficiency, but most of Europe improved more



Italy has made some progress in English proficiency over the past six years, rising above France, but others in Europe, such as Hungary and Poland, have made far more.

more competitive. The country's best and brightest are increasingly leaving the country to look for work abroad. As of 2012, there were 338,000 Italians working in Germany, 82,000 in Spain, and 77,000 are in the U.K.

Yet an increasingly competitive global marketplace may eventually force Italian companies to move to more knowledge-based sectors. Since 2007, 55,000 manufacturing firms have closed in Italy. "It's not enough though just to drive down cost," says Davide Castiglioni, Vice-President of Manufacturing Operations at Whirlpool. "Being competitive means more research and more networking—even big firms can't be alone today." English is essential in global collaboration, research, and partnership development.

Potential catalysts of change

Although located in the heart of Europe and one of the European Union's founding members, Italy is significantly less diverse than other large European nations. Just 7.5% of the population is foreign-born, where in the U.K., Germany, and Spain this percentage is well above 10%. However, Italy's demographics are changing quickly. A rapid rise in immigration to Italy, up 283% in the last decade, will inevitably open Italy up to the world.

The education system is also increasingly trying to address the demands of a globalized workplace. In 2004, English was introduced as a mandatory subject for all students from the age of seven. Recent reforms are attempting to modernize schools and address the relatively weak level of instruction in English. The school system has been entirely reorganized and teacher initial training and re-training redefined. These reforms include a total revision of the national system for assessing and evaluating schools. The teaching of another subject in English will be a mandatory part of the final year of high school in all tracks starting in 2014, though the lack of English skills among teachers has proven a hurdle for implementation. This year, 2,000 Italian high school teachers are attending university courses to improve their English and learn new teaching methodologies.

It is clear to many that Italy must transition to being a more knowledge-based economy. Our research shows that knowledge-based economies with high levels of international integration rely on an English-speaking workforce to collaborate with partners around the world. If Italy can make meaningful reform and convince qualified young Italians to return to Italy, bringing their language and cultural skills with them, the country as a whole will benefit.

Immigration to Italy has risen by 283% in the last decade, which will inevitably open Italy up to the world.

SPAIN

Spain—Accepting English in a challenging economy

EF EPI Rank: #23

Trending Up

Spain's EF EPI score has increased by 4.50 points.

Spanish adults are progressively improving their English, as attitudes towards English shift and economic pressure makes practical job skills more important. In the first EF EPI report, published using data gathered from 2007 to 2009, Spain ranked last among all European countries in English proficiency. Today, although proficiency levels are still moderate, Spain has made progress, outpacing both France and Italy. In Europe, only Poland and Hungary have improved their English more than Spain during the past six years.

Although there are many challenges in Spain, we may be witnessing a tipping point in regard to English. In high proficiency countries, English is seen as a key skill that everyone will master to a high level during their education. In low proficiency countries, it is generally accepted that most people will not be able to use English when they graduate, and adults will readily admit to not speaking the language. Spain's current education reforms defining English, math, and Spanish as the three key subjects, the explosion of bilingual education at the primary and pre-primary level, and a growing number of Spanish students and professionals overseas all point to a sea change in Spain's attitude towards English proficiency.

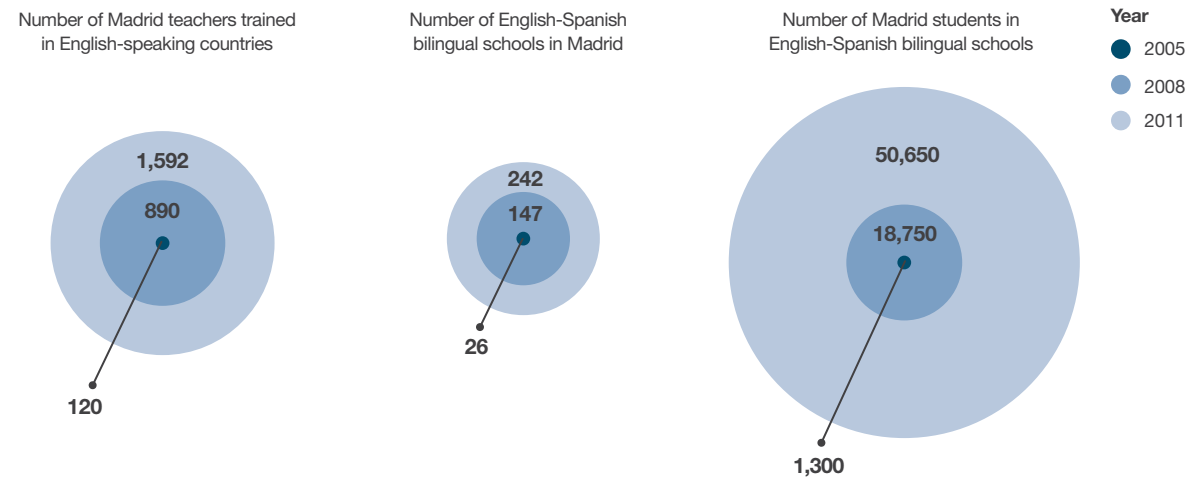
English as a basic skill

In Spain, English is shifting from an admirable skill to a basic one. This is illustrated most clearly by the expansion of bilingual public schools across the country. Piloted 15 years ago in a handful of schools in Andalusia and Madrid, the bilingual English-Spanish program is now in 300 primary schools and 91 secondary schools. In these schools, students spend at least 30% of their day in English, not only studying the language, but also using it to learn other subjects such as history, math, science, art, and physical education.

The increase in the number of Spanish teachers who have tested at an intermediate level or above, as well as large numbers of foreign guest teachers, have enabled the program to spread to new schools every year. Critics argue that the level of English of most primary school teachers is not sufficient for them to teach in English and that students may be learning core subjects less thoroughly as a result. Although these bilingual schools are too new to have had an impact on adult proficiency levels, their spread across the country is evidence that many parents and educators see English as a top priority.

Other signs also point to Spain prioritizing English. In 2014 for the first time, graduating high school students will be required to pass an oral English test as part of the Selectividad, Spain's high school exit exam. Scores on the English portion of the 2013 Selectividad

Explosion of English-Spanish bilingual education in Spain



Madrid is a case study for the expansion of bilingual public schools across the country, as policymakers aim to improve students' English skills through increased exposure. This growing acceptance of English, difficult economic conditions, and a pro-English government are all driving more people to study English with greater intensity than ever before.

indicate that there is still work to be done: the average score in English was 6.04, lower than any other subject tested. There is discussion of an English graduation requirement for all university students, which could be met through a minimum score on a standardized English test, a final project in English, or time spent studying abroad in an English-speaking country.

An extensive package of reforms to the basic law governing public education in Spain lists "improving foreign language learning" as one of its seven explicit goals. Promoted by the Spanish government, the reforms aim to modernize the Spanish education system through the introduction of technology, the restructuring of the school curriculum, and the decentralization of some decisions. Under the reforms, English will be defined as an "instrumental subject" along with math and Spanish and given extra instruction time in the curriculum at all schools.

Crisis driving change

Spain's ongoing economic crisis, which started in 2008, is also having a major impact on the importance of English in the country, fueling ongoing debate about English proficiency levels. Large numbers of unemployed people are getting English training or returning to university in hope of improving their professional prospects. Faced with enormous demand and shrinking budgets, prices for English courses in public continuing education schools have skyrocketed, rising as much as 200% in 2013. The government, strapped for cash and largely unable to borrow, has cancelled the popular Becas Mec program, which funded thousands of students for three weeks of language immersion abroad during their summer holidays. Due to budgetary constraints, Becas Mec has been replaced with a cheaper program in which 14,000 students receive funding for a week of intensive English immersion in Spain.

Faced with an uncertain outlook for their own country's future, Spanish students are studying abroad now more than ever before, hoping to gain skills that will make them more attractive to future employers. The European Erasmus program sent nearly 40,000 students abroad from Spain in 2011-2012, more than from any other country. Spanish students most often go to Italy, France, and Germany, but over 4,000 of them studied in the U.K. last year. The Erasmus program has grown by 58% in Spain since 2007, one of the highest rates in Europe.

The economic crisis in Spain has hit young people particularly hard, with a youth unemployment rate of 56%. Many unemployed young people are seeking work abroad, even when the jobs they can find there are menial. In 2011, over 30,000 Spaniards were registered U.K. residents, up 300% from 2007.

Although Spain's English proficiency remains moderate, there are signs that the progress Spain has made in English will continue in years to come. A growing acceptance of English as an essential tool worthy of investment, difficult economic conditions, and a pro-English government are all driving more people to study English with greater intensity than ever before. There is still a great deal to do, but Spain appears to be well on its way to embracing English as a necessary skill in a globalized world.

Spain's economic crisis has hit young people particularly hard, with a youth unemployment rate reaching 56%.

BRAZIL

Brazil—A booming economy demands more English speakers

EF EPI Rank: #38

Trending Up

Brazil's EF EPI score has increased by 2.80 points.

While Brazilian adults' English has improved in the past six years, their progress does not match the magnitude of Brazil's economic development over the same period. The World Economic Forum's 2009 Global Competitiveness Report observed the incongruity between economic growth and education as a whole: While Brazil has an "extensive and growing domestic market," "one of the most developed financial markets in the region," and "significant potential for innovation," its "education system remains in serious need of upgrading." The report ranked Brazil 79th for primary education and 58th for higher education and training.

The Brazilian government and the private sector have taken note and initiated major education programs in the past few years. Since these investments target children and university students, their results are not yet evident in improved adult English proficiency.

International spotlight

In 2009, when Brazil received news that Rio de Janeiro had been selected to host the 2016 Olympic Games, the Secretary of Education called for the city's children to receive English lessons. These language courses would "prepare these children so that they can actively participate in the opportunities that will open up because of the Olympics."

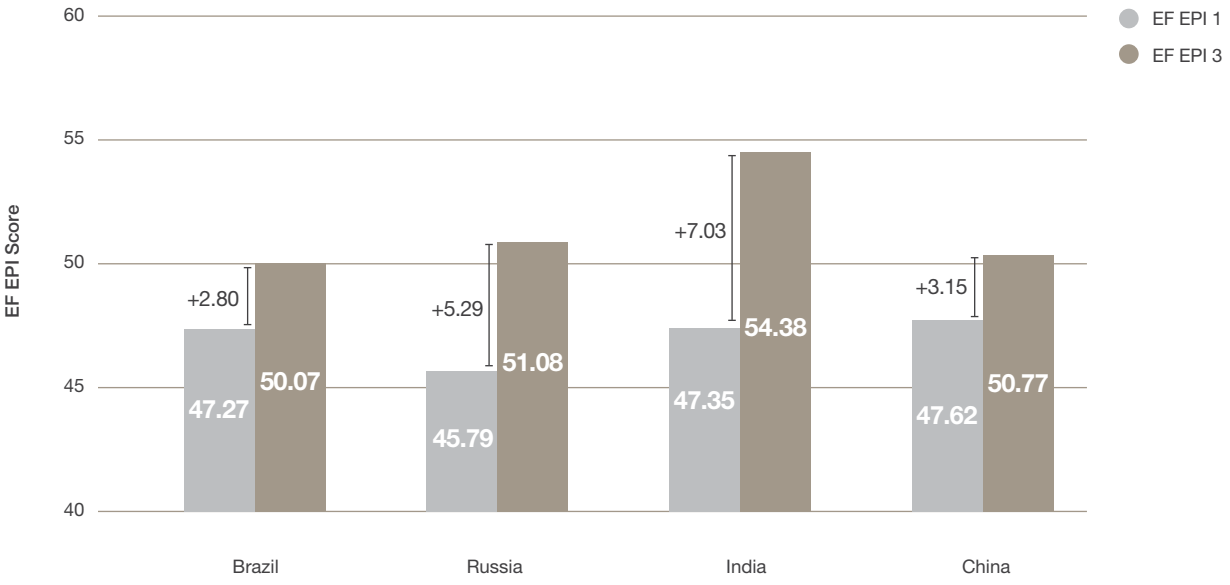
Athletes from around the globe will also converge in Brazil for the 2014 FIFA World Cup. In anticipation of this event, the Brazilian government has granted English lessons to 306,000 tourism professionals. As Brazilians from students to professionals brush up on their English for these major international games, the country's average proficiency level will continue to improve.

Economics driving better English

As of 2012, Brazil was home to 6,215 branches of more than 70 language school brands, according to the Brazilian Franchising Association. Private tutorials with native English-speaking teachers cost 30 to 50 USD per lesson, more than 10% of what a minimum wage earner makes in a month. Therefore, only those in the middle or upper classes can afford them.

In the last decade, Brazil has tripled its GDP. The Brazilian government estimates that 55% of the country is middle class today, compared to just 34% in 2005. The expansion of Brazil's middle class has allowed for increased investment in private English courses.

English proficiency in Brazil and other BRIC countries is trending up



Across the board, English language skills are improving in the BRIC countries. This year, India and Russia have moved ahead of China, and Brazil is closing in fast.

One could argue that most of Brazil's improvement in adult English skills can be attributed to private language schools. The education system is consistently criticized for its poor quality. If this is the case, then Brazil's economic boom can be credited with giving millions of people enough disposable income to invest in their English skills.

Despite an already healthy sector, there is still room for growth in the language training market. According to the Brazilian Institute of Public Opinion and Statistics, about 80% of the middle class say they do not speak any foreign languages.

An eye towards the future

The World Economic Forum's 2009 Global Competitiveness Report applauded Brazil for leading its region in "local companies turning global." By 2007, Brazil's foreign direct investment outflows surpassed inflows by 10 million USD. However, the labor market needs more competent English speakers to fill new international positions. Dr. Alvaro A. Comin and Dr. Rogerio Barbosa of the Brazilian Institute at King's College, University of London, confirmed that Brazil lacks "a high-skilled labor force, a concern often expressed by the entrepreneurs and their business associations."

To address this serious problem, the Brazilian government has launched several aggressive initiatives to better train its labor force. Through the Science Without Borders program, by 2014, the Ministry of Education, the Ministry of Science and Technology, and the private sector will have fully funded 100,000 Science, Technology, Engineering, and Mathematics (STEM) students to spend a year at top foreign universities.

By 2014, Brazil will have funded 100,000 STEM students to spend a year at top foreign universities.

However, because many students have tested below the English language requirement for Science Without Borders, the government also created a parallel program called English Without Borders to help more students take advantage of Science Without Borders. English Without Borders aims to give five million university students access to online English courses and fund 500,000 TOEFL tests. Students with the highest scores on the TOEFL will be awarded in-person English courses.

Separately, Brazil has strengthened educational ties with the United States. Through the Institute of International Education, 1,080 Brazilian teachers per year are sent to the United States for English language and pedagogy training. In addition, the U.S. State Department has increased the number of Fulbright English Teaching Assistantships in Brazil, bringing American English teachers to work with 200,000 Brazilian university students.

The Brazilian government and the private sector are determined to lift the country's English proficiency level. Only the years to come will show if these investments have been successful.

MEXICO

Mexico—Poor English a sign of its troubled education system

EF EPI Rank: #40

Slight Decline

Mexico's EF EPI score has decreased by 1.57 points.

Since Mexico signed the North American Free Trade Agreement in 1994, the United States has become Mexico's largest trading partner. With a long border and increasing economic connectivity, many Mexicans have recognized the importance of English. Despite this understanding, Mexico is one of four Latin American countries that have experienced a decline in English skills in the past six years. Although in absolute terms the decline was small, it was enough to move Mexico into the Low Proficiency band.

Policymakers and international observers have publicly lamented the dysfunction and ineffectiveness of Mexico's education system. In the 2009 PISA results, which measure the knowledge of 15-year-olds across the world, Mexico ranked last among Organisation for Economic Co-operation and Development (OECD) countries for reading literacy skills. With such low Spanish reading skills, Mexican students are ill equipped to learn English. According to our research, Mexico is also last among OECD countries in adult English proficiency.

In light of these challenges, Mexico's president has called for a remake of the Mexican education system. Mexico's Congress has passed dramatic reforms, but they faced violent protests from the nation's powerful teachers' union. Mexico's future progress in English learning depends on the effectiveness of these reforms.

A Latin American context

Compared to other regions, Latin America has some of the weakest adult English skills. Though two-thirds of Latin American countries have made progress over the past six years, they began with such poor English that more than half are still in the lowest proficiency band. Argentina is the only country in the region with moderate English skills.

The 2009 PISA results show that our findings are consistent with overall education trends in Latin America. Despite "slightly better" performance, PISA reports, "the countries in the region are ranked among the lowest performing countries." Many Latin American students fail to reach PISA's level two, which means they "have difficulties performing the most rudimentary reading tasks and lack the essential skills needed to participate effectively and productively in society." If students struggle to read in their native language, they are unlikely to be ready to learn a foreign language.

Mexico is not doing much better than other Latin American countries; in fact, Mexico's English skills have weakened. In 2007, Mexico placed second in Latin America, just after Argentina. By 2012, it was surpassed by Uruguay, Costa Rica, Brazil, and Peru in English proficiency.

Mexico follows the low English proficiency trend in Latin America

Rank	Country	EF EPI	Level
19	Argentina	54.43	Moderate Proficiency
29	Uruguay	51.49	Low Proficiency
37	Costa Rica	50.23	Low Proficiency
38	Brazil	50.07	Low Proficiency
39	Peru	49.96	Low Proficiency
40	Mexico	49.91	Low Proficiency
44	Chile	48.20	Very Low Proficiency
46	Colombia	47.07	Very Low Proficiency
48	Ecuador	46.90	Very Low Proficiency
49	Venezuela	46.44	Very Low Proficiency
52	Guatemala	45.72	Very Low Proficiency
53	El Salvador	45.29	Very Low Proficiency
56	Panama	43.61	Very Low Proficiency

Other than Argentina, the rest of Latin America is stuck in the Low or Very Low proficiency bands. Mexico is not doing much better than its neighbors. Six years ago, Mexico placed second in Latin America, just after Argentina. It has since slipped, while Brazil, Costa Rica, Peru, and Uruguay have surpassed it.

Battling existing inequalities

Persistent inequalities are one of the reasons why Mexico's average level of English is low. Most students who already have strong English come from Mexico's expensive private schools, but a vast majority of students attend public schools. These public school students cannot compete with their privately educated peers. Private schools start English education as early as kindergarten, whereas public schools are only required to offer English courses between seventh and ninth grade. Private schools also have the resources to hire qualified English teachers and send their students to overseas summer programs.

Dr. Juan Manuel Martinez Garcia, Planning Director for Curricular Development at the Ministry of Education, said, "It is necessary to make it very clear for all the stakeholders that learning English is not only a political issue, but a social, cultural, and, why not say it, an economic one."

Recognizing these inequalities, the Mexican Secretariat of Public Education has proposed universal English education for all primary schools. In the fall of 2009, supported by federal funding, the Secretariat piloted the expansion of English education to 5,000 primary schools across 21 states.

However, to eventually teach English to all 12 million of its primary school students, Mexico will need to recruit and train an additional 85,000 English teachers. This will be an enormous challenge because, like any country with a low level of English proficiency, Mexico does not have enough college graduates with strong English skills who are interested in joining the teaching profession.

Challenges ahead

Moving forward, the challenge for Mexico is not the prioritization of English, as the Mexican government has identified English as an important tool for improving the country's economy. Fernando Gonzalez, Deputy Minister of Basic Education, said: "The ability to speak English in the 21st century is a must if we want to insert ourselves in the global economy [and] improve our standard of living."

More than 24,000 schools and 6.7 million students are now participating in the National English Program in Basic Education, a new English program that aims to help students to reach level B1 by the ninth grade, which is the end of compulsory education in Mexico.

Instead, the challenge for Mexico is improving the overall health of its education system. With the government locked in a contentious fight with the teachers' union, education has become highly politicized. It remains to be seen whether reforms can revitalize a system that has so far failed to deliver a quality education for most of its students.

If English classes are eventually extended to all primary public schools, and teacher quality is enhanced, then perhaps the average level of English will be lifted. To achieve this, however, politicians and educators will first have to reconcile their differences and work towards a common goal of helping students learn more effectively.

Mexico will need to recruit an additional 85,000 teachers to teach English to all of its 12 million primary school students.

EF EPI CORRELATIONS

Over the past six years, we have found strong and consistent correlations between English proficiency and a number of social and economic indicators.

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

Importance of English as a foreign language

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

Globalization is driving English learning

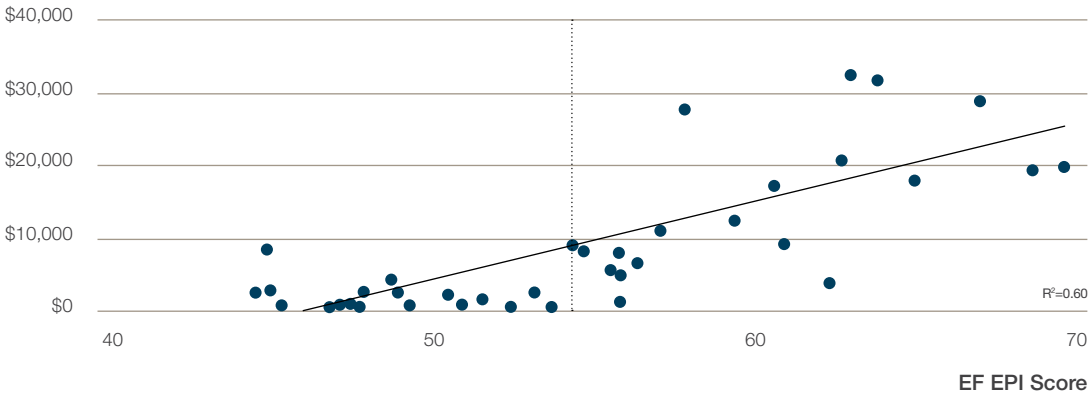
A 2010 survey of 26,000 non-native English-speaking employees in international corporations, conducted by Global English, indicated that 55% of employees were using English every day at work. Only 4% indicated that they did not use English at work at all.

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

Export-driven economies require English

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

Exports per capita*



English fuels exports

The correlation between English proficiency and exports per capita has an interestingly sharp dividing line. Countries with low and very low proficiency have uniformly low levels of exports per capita, with the notable exception of Saudi Arabia's unusually oil-based economy. Starting at moderate proficiency, however, the relationship between improved English and increased exports is clear. A minimum level of English is required to export successfully.

***Source:** CIA World Factbook, Exports per Capita, 2011

English and Economic Development

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

Individual earning power and English

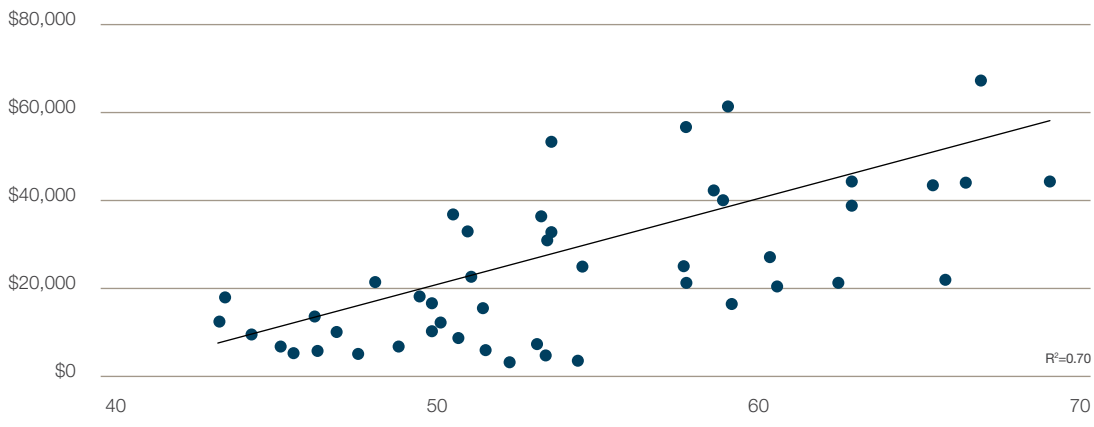
Although English skills have long been an explicit requirement in certain types of jobs such as diplomacy and translation, those skills today are an implicit advantage in nearly any job across all sectors of the economy. Recruiters and HR managers around the world report that candidates with unusually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

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

English is key to attracting foreign investment

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

Gross National Income per Capita*

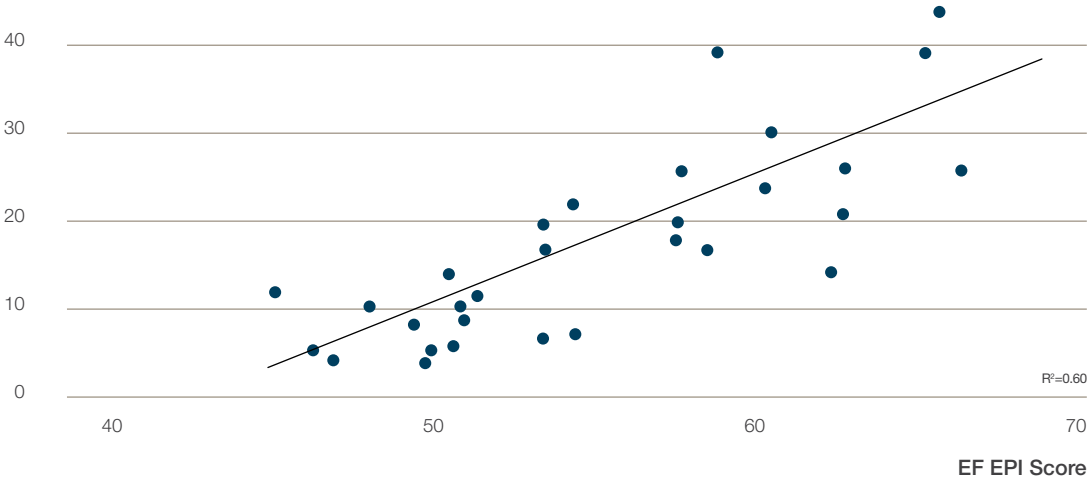


Better English and higher income go hand in hand

The interaction between English proficiency and gross national income per capita is a virtuous cycle, with improving English skills driving up salaries, which in turn give governments and individuals more money to invest in English training. The relationship also applies anecdotally on a micro level, where improved English skills allow individuals to apply for better jobs and raise their standards of living.

***Source:** United Nations, GNI per capita PPP($), 2012

Trade in Services (% of GDP)*



Globalized service economies are English-speaking economies

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

***Source:** World Bank, 2012. The sum of service exports and imports divided by the value of GDP, all in current U.S. dollars.

Doing Business in English

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

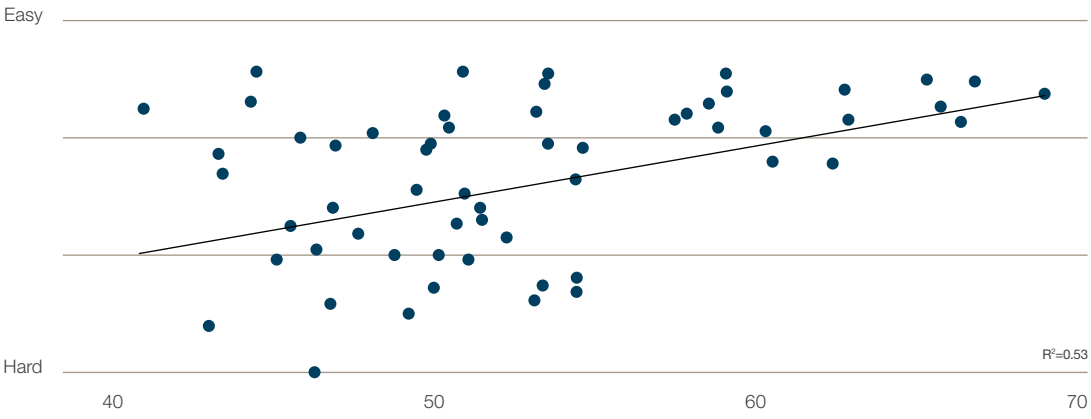
English as the company language

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

In 2010, Rakuten, Japan's largest online marketplace, also took the plunge. In her case study, Harvard Professor Tsedal Neely lays out the goals and challenges of this ambitious move. The goals were evident: to increase the company's competitiveness on the global playing field, to remove linguistic bottlenecks in internal task and resource allocation, and to speed integration in international mergers and acquisitions. The primary challenges were to make sure the new policy was implemented uniformly, to motivate employees to raise their level of English quickly without undermining their self-confidence, and to minimize productivity losses during the period when many employees' English was still limited.

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

Ease of Doing Business Score*



It's easier to do business in English

The World Bank and IFC's Ease of Doing Business Index ranks the regulatory environments of economies around the world by how conducive they are to starting and operating a business. In countries where English is not an official language, doing business is easier when English skills are better. This may indicate that the countries delivering quality English language instruction in schools are thereby encouraging mindsets and skill sets that lead to entrepreneurship. Countries that wish to stimulate entrepreneurial activity take note: English skills are a key component to creating a business-friendly environment.

***Source:** World Bank and IFC Ease of Doing Business Index, 2012

English and Quality of Life

English as a basic skill

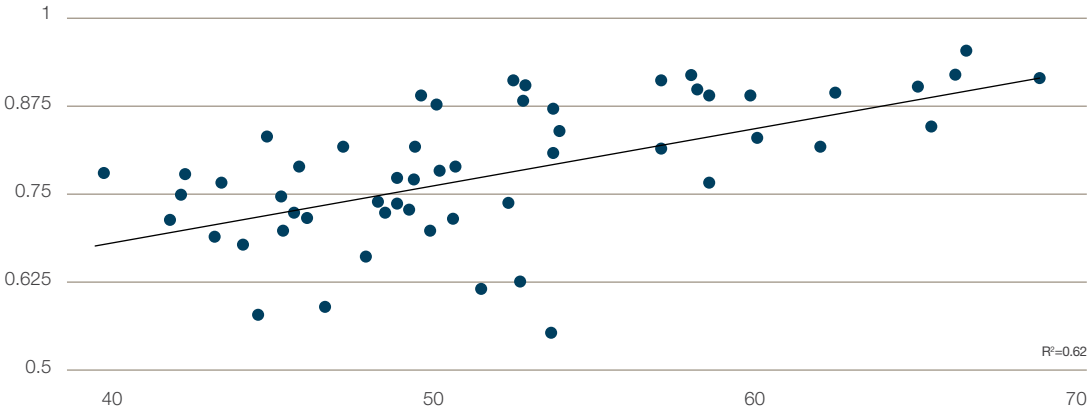
English skills are key to a country's economic development. Their link to human development is more tenuous. Obviously teaching English is not possible when populations are struggling to gain access to clean water, health care, schools, and adequate security. It is only after a society is sufficiently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

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

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

Too often English is treated as a luxury.

Human Development Index (HDI)*



Better English and a better quality of life

The Human Development Index (HDI) is a measure of education, life expectancy, literacy, and standards of living. HDI and EF EPI scores correlate positively, but as with some other indicators, there is a cutoff mark for that correlation. Low and very low proficiency countries display variable levels of development. However, no country of moderate or higher proficiency falls below "Very High Human Development" on the HDI.

***Source:** United Nations Human Development Report, 2012

CONCLUSIONS

The ability to communicate in English is a requirement in a globalized economy.

Our data has shown that English proficiency correlates with social and economic indicators, such as Gross National Income per capita and the Human Development Index. Through close examination of 11 countries and territories, we see that governmental and non-governmental actors throughout the world recognize the link between English proficiency and a strong economy. In the past decade, they have poured resources into developing the English skills of their workforces, but not all policies and practices have proved effective.

By looking around the world at the English proficiency levels of 60 countries and territories, the EF EPI gives us a unique perspective on what strategies are successful in raising English proficiency among adults. As we take a look at the past six years, with data from nearly five million adults, we can draw the following conclusions:

- **Only smart investments pay off.** The biggest spenders in English training aren't always the winners. Therefore, governments, companies, parents, and professionals must consider carefully the English training program or policy that they choose to invest in.
- **Schools are the foundation of English education.** Though private English classes have become increasingly popular for both children and adults, most people don't study English after leaving school. Making English communication skills a core element of the public education system is the only reliable way to build an entire workforce that can use English in a professional context.
- **To train students, start with teachers.** When instruction and assessment are aligned to promote English communication competency, English language teachers need professional development and immersion programs to learn to teach spoken English. Teachers of other subjects need English training and methodology courses when they will be using English as a language of instruction. Getting this training right is central to the success of any reform program aiming to raise English proficiency.
- **Assessment shapes instruction.** National exams, especially high-stakes high school and university entrance and completion exams, must be aligned with the goal of proficient English communication skills. If high-stakes exams assess only grammar and translation, teachers and students will concentrate their efforts on those skills too.
- **Private investment can be optimized.** In countries where individual investment in English training is high, social and economic demand for English skills outpace what the school system is providing. Governments can assist individuals in identifying quality English training programs, setting national standards for adults, and partially funding the best professional English courses. The internet gives individuals access to high-quality English training even in remote areas.
- **Exposure to English is essential.** Learning to speak a language requires lots of practice. In schools, reforms that introduce English as a language of instruction for other subjects have consistently positive results on student English proficiency. At the university level, offering courses and degree programs in English not only improves local proficiency; it opens the university system to more foreign students. For professionals, using English at work and training that includes an immersion component are reliably effective strategies. On a national scale, subtitling English-language TV and movies rather than dubbing them brings English out of the classroom and into daily life.

By evaluating what other countries have tried, individuals, educators, and governments can identify strategies to improve English proficiency and avoid the most common pitfalls. There is no one-size-fits-all solution for improving English learning; however, international best practices are steadily emerging. We hope that by sharing our data on adult English proficiency trends around the world we have helped to highlight some of those best practices. It is our hope that the EF EPI will serve as a catalyst for discussions around English language learning and promote English as an essential tool for participation in the global marketplace of ideas and commerce.

There is no one-size-fits-all solution for improving English learning; however, international best practices are steadily emerging.

ABOUT THE INDEX

Methodology

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

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

There is no incentive for test takers to inflate their scores artificially on these low-stakes tests by cheating or cramming, as the results do not lead to certification or admission to a program.

Test takers

The EF EPI third edition was calculated using 2012 test data from about 750,000 test takers. Only countries with a minimum of 400 test takers were included in the index. Countries with fewer than 100 test takers on either of the two tests were also excluded, regardless of the total number of test takers. A total of 60 countries and territories were included.

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

In addition, because the tests are online, people without internet access or unused to online applications are automatically excluded. In countries where internet usage is low, the impact is logically the strongest. These biases would tend to skew scores higher than for the general population, excluding poorer, less educated, and less privileged people.

Score calculation

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

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

EF Education First

EF Education First *(www.ef.com*) was established in 1965 with the mission to break down barriers of language, culture, and geography. With 460 schools and offices in over 50 countries, EF specializes in language learning, educational travel, academic degrees, and cultural exchange programs. EF served as the Official Language Training Supplier of the Beijing 2008 Olympic Games and is currently the Official Language Training Supplier of the Sochi 2014 Winter Olympics. EF publishes the EF English Proficiency Index (*www.ef.com/epi*).

CEFR levels and can-do statements

Proficient User

C2 Can understand with ease virtually everything heard or read. Can summarize information from different spoken and written sources, reconstructing arguments and accounts in a coherent presentation. Can express him/herself spontaneously, very fluently and precisely, differentiating finer shades of meaning even in more complex situations.

C1 Can understand a wide range of demanding, longer texts, and recognize implicit meaning. Can express him/herself fluently and spontaneously without much obvious searching for expressions. Can use language flexibly and effectively for social, academic, and professional purposes. Can produce clear, well-structured, detailed text on complex subjects, showing controlled use of organizational patterns, connectors, and cohesive devices.

Independent User

B2 Can understand the main ideas of complex text on both concrete and abstract topics, including technical discussions in his/her field of specialization. Can interact with a degree of fluency and spontaneity that makes regular interaction with native speakers quite possible without strain for either party. Can produce clear, detailed text on a wide range of subjects and explain a viewpoint on a topical issue giving the advantages and disadvantages of various options.

B1 Can understand the main points of clear standard input on familiar matters regularly encountered in work, school, leisure, etc. Can deal with most situations likely to arise while travelling in an area where the language is spoken. Can produce simple connected text on topics which are familiar or of personal interest. Can describe experiences and events, dreams, hopes, and ambitions and briefly give reasons and explanations for opinions and plans.

Basic User

A2 Can understand sentences and frequently used expressions related to areas of most immediate relevance (e.g., very basic personal and family information, shopping, local geography, employment). Can communicate in simple and routine tasks requiring a simple and direct exchange of information on familiar and routine matters. Can describe in simple terms aspects of his/her background, immediate environment, and matters in areas of immediate need.

A1 Can understand and use familiar everyday expressions and very basic phrases aimed at the satisfaction of needs of a concrete type. Can introduce him/herself and others and can ask and answer questions about personal details such as where he/she lives, people he/she knows and things he/she has. Can interact in a simple way provided the other person talks slowly and clearly and is prepared to help.

Quoted from the Council of Europe

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

EF EPI COUNTRY SCORES

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

The EF EPI first edition used test data from 2007 to 2009, the second from 2009 to 2011, and the third from 2012.

Country	EF EPI First Edition	EF EPI Third Edition	Score Change
Algeria	47.13*	43.16	-3.97
Argentina	53.49	54.43	+0.94
Austria	58.58	62.66	+4.08
Belgium	57.23	58.74	+1.51
Brazil	47.27	50.07	+2.80
Chile	44.63	48.20	+3.57
China	47.62	50.77	+3.15
Colombia	42.77	47.07	+4.30
Costa Rica	49.15	50.23	+1.08
Czech Republic	51.31	54.40	+3.09
Denmark	66.58	65.15	-1.43
Ecuador	44.54	46.90	+2.36
Egypt	45.92*	48.89	+2.97
El Salvador	47.65	45.29	-2.36
Estonia	—	65.55	new
Finland	61.25	62.63	+1.38
France	53.16	50.53	-2.63
Germany	56.64	58.47	+1.83
Guatemala	47.80	45.72	-2.08
Hong Kong SAR	54.44	53.54	-0.90
Hungary	50.80	60.41	+9.61
India	47.35	54.38	+7.03
Indonesia	44.78	53.44	+8.66
Iran	52.92*	49.30	-3.62
Iraq	—	38.16	new
Italy	49.05	50.97	+1.92
Japan	54.17	53.21	-0.96
Jordan	—	46.44	new
Kazakhstan	31.74	43.47	+11.73
Kuwait	47.01*	46.97	-0.04

Country	EF EPI First Edition	EF EPI Third Edition	Score Change
Latvia	—	57.66	new
Libya	42.53*	44.65	+2.12
Malaysia	55.54	58.99	+3.45
Mexico	51.48	49.91	-1.57
Morocco	49.40*	47.71	-1.69
Netherlands	67.93	66.19	-1.74
Norway	69.09	66.60	-2.49
Panama	43.62	43.61	-0.01
Peru	44.71	49.96	+5.25
Poland	54.62	62.25	+7.63
Portugal	53.62	57.52	+3.90
Qatar	48.79*	45.97	-2.82
Russia	45.79	51.08	+5.29
Saudi Arabia	48.05	41.19	-6.86
Singapore	58.65*	58.92	+0.27
Slovakia	50.64	54.58	+3.94
Slovenia	—	60.19	new
South Korea	54.19	53.46	-0.73
Spain	49.01	53.51	+4.50
Sri Lanka	—	51.47	new
Sweden	66.26	68.69	+2.43
Switzerland	54.60	57.59	+2.99
Taiwan	48.93	50.95	+2.02
Thailand	39.41	44.44	+5.03
Turkey	37.66	49.52	+11.86
Ukraine	—	53.09	new
United Arab Emirates	45.53*	50.37	+4.84
Uruguay	53.42*	51.49	-1.93
Venezuela	44.43	46.44	+2.01
Vietnam	44.32	52.27	+7.95

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

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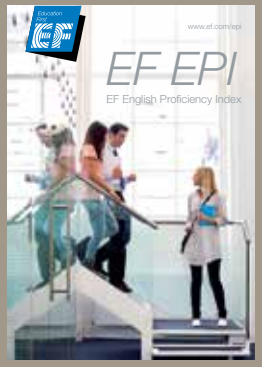

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