About the EF English Proficiency Index for Companies (EF EPIc) Report

The EF English Proficiency Index for Companies (EF EPIc) is an evaluation of global workforce English skills. It measures English proficiency levels in 18 industries and 24 countries, in companies with an annual turnover ranging from under USD1 million to over USD100 billion. This report aims to set national and international benchmarks for workforce English, against which individuals and companies can evaluate their communicative competitiveness.

The EF EPIc is based upon research conducted over a three-year period. Between 2009 and 2011, 114,578 employees of companies and governments took an English proficiency test administered by EF Corporate Language Learning Solutions and completed a questionnaire. These employees were not enrolled in an English-training program at the time, and the results of the test were not used to determine pay. Geographically, 56% of the employees were European, 30% were from Asia, and 12% were from the Americas. The other 2% were from the Middle East. Employees from 1,207 companies and government bodies participated. Looking at levels of seniority, 66% of test takers identified themselves as staff, 27% as managers, and the rest as executives.

This report is a companion to the EF EPI report, which evaluates adult English proficiency levels around the world based on a separate set of test results from 1.7 million people over the same three-year period. Together, these two reports provide a multifaceted perspective of English ability around the world. Both reports, as well as a collection of country fact sheets, are available for download at www.ef.com/epic.

We would like to thank all participants for their contribution to this research.
Executive summary

In an increasingly international environment, companies are turning to global markets in search of revenue, operational efficiencies, and strategic partnerships. The ability to communicate and understand foreign cultures contributes to the success of corporate expansion abroad. Professionals are challenged by the differences in language and culture impeding their progress. In a 2012 Economist Intelligence Unit survey of 572 executives, nearly 90% of respondents said that if cross-border communication improved at their company, then profit, revenue, and market share would improve as well.

English is the most common medium of international communication today, and all the more so in the workplace. An increasing number of companies, both large and small, are making English their official language. In the same Economist survey, nearly 70% of executives said their workforce will need to master English to realize corporate expansion plans, and a quarter of them said more than 50% of their total workforce will require English proficiency. Yet today’s companies and governments lack adequate industry-wide and country-wide benchmarks against which to measure their employees’ English. Without them, determining which individuals and groups require additional training, and how much, is haphazard. The EF EPIc aims to provide these missing benchmarks so that companies and professionals can see precisely how their English skills measure up to the competition.

Below are some of the key findings of the report:

The workforce often speaks less English than the adult population as a whole
Despite the critical role English plays in international business, this skill is underrepresented in national workforces. In two-thirds of the countries tested, the national workforce has weaker English than the adult population as a whole, sometimes by a significant margin.

English skills are lacking in almost every group
Only people with very high English proficiency can read and understand technical writing, engage in subtle dialog on topics both within and outside their area of specialization, and communicate effortlessly without prior preparation on a range of professional topics. None of the countries or industries surveyed attained such high proficiency. With current skills, our data shows a universal loss in efficiency and effectiveness in the workplace when communication must take place in English.

Global industries speak English better than national ones
Multinational industries such as travel and consulting have stronger English proficiency skills than industries that tend to operate on a local or national scale like education, government, and retail. But industry variation is high between countries. In Finland the education sector has the strongest English, while in Sweden public service attracts the best English speakers.

Medium-sized companies speak English best
Both large and small companies can do more to improve the English skills of their employees. The companies with the best English are those with annual turnover between USD100 million and USD500 million, although managers in somewhat larger companies are the strongest individual group. Executive English consistently lags behind in companies of all sizes.

Some executives excel in English, others fail
Executives are not average employees. Their uniqueness is evident in their English skills. In France, Italy, and South Korea, executive-level English is far better than that of other employees. In the Netherlands, Norway, and China, it is far worse. Whether broken down by country, industry, or company size, executives are far more likely than any other group to score a meaningful distance above or below average. This finding has important ramifications for executives considering how best to improve the English of their employees. Their experience with the language is unlikely to be representative.
Skills stretched to the limit

Global economic integration continues apace
Production, consumption, and the provision of services are increasingly globalized activities. International mergers and acquisitions are commonplace as companies compete for customers the world over. This internationalization of markets shows no signs of slowing despite the economic challenges many countries currently face. If anything, it appears to be picking up speed as economic pressures increase competitiveness and push companies to search for new opportunities outside their familiar national markets.

At the same time physical boundaries no longer slow communication. Online and mobile technologies combine to enable instant contact around the world. But instant contact does not mean smooth communication. Although many decry globalization’s omnipresence, national languages and cultures remain highly distinctive and deep-rooted. Creating an efficient, cohesive workforce from the cultural and linguistic diversity that new technology enables is a challenge for today’s business leaders.

Companies need communicators
Companies find themselves stretched between opposing forces. Global competition drives businesses to operate internationally, but their employees’ limited linguistic skills and cultural inflexibility hamper communication with partners and customers outside their own countries. While it used to be possible to centralize international communication in a department staffed by individuals with the necessary skills, today such a structure seems quaint. Communication between employees with different native languages and cultures, within a company and outside it, is pervasive at all levels of seniority and across all functions.

The dramatic increase in international communication and travel both in the workplace and in everyday life over the past three decades guarantees a certain disconnect between the skills today’s workforce learned at school and those they need at work. On-the-job training and continuing education have closed the gap for some people. But in many countries a large portion of the national workforce is still unprepared to work in a multicultural, multilingual environment. One of the most essential skills they are lacking is English.

International industries use English most
The industries with the highest and lowest English proficiencies are exactly those one would expect to see. International communication is a cornerstone of the travel and consulting industries, giving them a vested interest in ensuring high English proficiency. The English skills of workers in these industries are the best of any surveyed. It is also no surprise to see that employees in retail, the public sector, and media, sports, and entertainment are struggling in English. These industries operate largely on a national scale.

Executives underperform in English
The picture is more nuanced when broken down by levels of seniority. Retail executives speak far less English than their staffs, as do executives in banking and financial services. Staff below managerial level in these industries are in direct contact with customers, some of whom are likely to be from other countries. Thus the demands on their English skills are higher. Across all industries, executives are the most likely group to underperform their industry average.

Opportunity for governments
Governments, coming at the bottom of the proficiency rankings, have a unique opportunity to improve the English of their nations’ workforces by training and incentivizing public servants to master the language. In most countries more than 10% of working adults are employed in the public sector, and in many cases standardized exams determine entry into these positions. The logistics industry scores surprisingly poorly overall considering its inherent need for international communication, with the contrast between management and executives more pronounced than in most other industries.

Workforce English across industries

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Definition of terms
Executive: An employee with senior managerial responsibility often involved in defining and setting corporate strategy.
Manager: An employee with control or direction over a department or a team of workers.
Staff: An employee who does not fit into either of the above categories, with no direct responsibility for a department or team.
## Workforce English across industries

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<tr>
<th>Industry</th>
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Note: To interpret EF EPic scores as concrete skills, refer to the definitions in the appendix.
A world divided by English proficiency

Our data shows that there is an astonishingly wide gap between the most and the least proficient national workforces in English (24.63 points). Given that companies from every nation are partners and competitors in a globalized economy where English is the lingua franca, the continued existence of such a divide has significant implications for corporate competitiveness.

In higher proficiency countries, English communication is taught seriously in school at all levels, and applicants for office jobs are expected to speak English regardless of their position. Knowing this, any unqualified graduate will undertake the necessary training to raise his or her English skills in order to find employment. Television and movies are not often dubbed, ensuring frequent exposure to a variety of English accents in everyday contexts from childhood onwards. Northern Europe and parts of Central Europe have higher proficiency workforces.

In lower proficiency countries, English is taught as a secondary academic subject in school, often using outdated methods. English is not considered an essential skill for employability and even well-educated adults will readily admit that they do not speak the language. Television and movies are usually dubbed, restricting exposure to English to school classrooms and corporate meeting rooms—rare and stilted appearances. Companies cannot use English as a key criterion in selecting new employees because so few applicants would qualify. Parts of Europe, the Americas, the Middle East, and Asia have lower proficiency workforces.

The countries found in the middle are interesting cases of transition. Spain has implemented extensive education reform to promote English learning, but these reforms are too recent to have touched most of the adult population. Germany requires English of all students, but most media is dubbed, limiting everyday exposure. China’s professionals make up for the outdated teaching methods used in school by enrolling in droves for English-training courses in their spare time. The Czech Republic only introduced the teaching of English in school after the end of the Cold War, and subtitled American sitcoms and movies arrived around the same time.

These differing frames of reference on the importance of English for professionals leave a stark divide between those national workforces which communicate easily in English and those which do not. Many indicators of income, innovation, and trade correlate positively with English proficiency. Workforces with lower proficiency cannot communicate internationally with ease, making them less competitive in a globalized marketplace.

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Workforce English across countries

English skills vary significantly between nations, but also within them

The extremely wide range of English skill levels exhibited by national workforces is indicative of the differing levels of priority placed on English in the school system and the workplace. Varying levels of English within a country, however, cannot be explained so simply.

In some cases, a generational divide separates those who learned English in school from those who did not. This is the most likely cause of weaker executive-level English in both China and Russia, since executives tend to be older than the average member of the workforce. On the other hand, in Korea and France, strong executive-level English cannot be explained by history. Their skills spring from social norms. Korea has, for decades, sent many elite students to complete their education in the U.S. France educates top-tier students to a very high level in English via a system of elite graduate schools. In both countries, executives are far more likely to speak English well than other employees because of their atypical educational profiles.

In many countries, managers speak English far better than the workforce average. Their strength is indicative of corporate structures in these countries, where managers are called upon to interact with foreign partners and colleagues. Many employers reinforce managerial English skills by providing them with language training more readily than for general staff.

It is interesting to note that although most recent graduates, who still remember the English they learned in school, are in non-managerial staff positions, staff rarely speak English better than their managers. This is the case even though managers tend to have learned English at school longer ago than junior colleagues. This indicates that young professionals improve their English as they move up the career ladder into managerial positions.
Workforce English across countries

Country | EF EPiC Score
---|---
Netherlands | 65
Sweden | 60
Belgium | 55
Norway | 50
Denmark | 45
Finland | 40
Switzerland | 35
Poland | 30
Spain | 25
Germany | 20
China | 15
Czech Republic | 10
France | 5
Korea | 0
Saudi Arabia | -5
Colombia | -10
Italy | -15
Vietnam | -20
Japan | -25
Turkey | -30
Mexico | -35
Russia | -40
Chile | -45
Brazil | -50

Note: To interpret EF EPiC scores as concrete skills, refer to the definitions in the appendix.
English is a basic skill

Rightly or wrongly, English is everywhere

English is not just another language. True, it is spoken at home by hundreds of millions of people, and for those people English is just like any other language. However, two-thirds of English-speakers today did not learn the language at home. For them, English has an entirely different, and unique, function. It is a tool that they have acquired through determined study in order to communicate with those who do not share their native language. In a world teeming with international opportunity, it is an enviable skill.

Cultural and political debate on whether or not it is acceptable for English to be so pervasive is of little interest to ambitious professionals. If international communication is to be effortless, a common language is necessary. In our time the common language is English. In the minds of savvy business people, it follows logically that they must master this key skill.

Executive English weak in companies of all sizes

Executives have weaker than average English skills across companies of all sizes. Only in companies with annual turnover of USD100M–500M do executives have an equivalent level of English to other employees. This consistent trend underlines the challenges facing all language learners: insufficient time and motivation. Busy executives find it too time-consuming, or too humbling, to devote themselves to improving their English.

Average English proficiency in companies of all sizes is low, with the worst performers being the smallest and largest companies. Small companies often operate on a local or national scale and feel a less pressing need for English, which influences their recruitment priorities. The largest companies have operations so extensive in many countries that their employees can pursue their careers without ever leaving home, allowing them to recruit non-English speakers for many positions. However, for small companies wishing to grow, and for large companies looking for improved internal integration, English training may hold the key.

Note: To interpret EF EPIc scores as concrete skills, refer to the definitions in the appendix.
Professionals need better English
In almost every group evaluated in this year’s EF EPIc report, there is a significant English skill deficit. The only groups with an average skill level adequate for complex, in-depth interaction on technical subjects within their specialty are the national workforces in the Netherlands, Sweden, Belgium, Norway, and Denmark. All other countries have an average workforce English that only allows basic interaction on familiar topics—fine for chatting at the water cooler, but not nearly enough for efficient strategy sessions. Similarly, no industries or companies attained this higher proficiency level. A few groups and industries in individual countries do have strong English, but this is far from being the norm.

Furthermore, in two-thirds of the countries surveyed, the average level of English proficiency in the workforce is lower than in the population as a whole. In Denmark, the Czech Republic, Japan, and Russia, the employees tested for the EF EPIc scored more than five points lower than the national average.

This trend reflects three tendencies:
• Employees are busy and become complacent in their positions. Without corporate training programs, they do not improve their English autonomously.
• Job seekers, on the contrary, are actively seeking to improve their résumés. English skills are key components to improved employability in most countries.
• Employees selected to take the test included in this report are those who have been identified by their employers as needing improvement in English.

A few countries buck this trend, most notably China, Saudi Arabia, and Colombia. All three are countries with low proficiency in the general population. In each case, their workforce outperforms the national average by more than six points. These countries all have deep class divides, with a small cadre of English-educated business people greatly removed from their compatriots both in skills and opportunities.

Of course every country has a group of very high proficiency English speakers, and this report is not intended to denigrate their skills. When their colleagues’ English is obviously lacking, these highly proficient individuals are called upon to be spokespeople, translators, and go-betweens. These indirect communication channels open due to a generalized language deficiency. They are far less efficient than direct communication would be, but when English skills are lacking, they are the only reliable solution.

The workforce compared to the population as a whole
Workforce English compared to national averages
In a large majority of the countries surveyed, the average level of English in the workforce is lower than the national average for all adults. In most countries the gap between the two groups is significant (two or more points): four countries in favor of the workforce, 12 in favor of all adults. In the four countries with the most proficient workforces—the Netherlands, Sweden, Belgium, and Norway—the gap is very narrow. It is equally narrow in Spain, France, and Mexico.
The workforce compared to the population as a whole

Note: To interpret EF EPic scores as concrete skills, refer to the definitions in the appendix.
One of the primary aims of this research is to provide companies and professionals with worldwide benchmarks which can be used to measure their current level of English against both partners and competitors in their industries. These benchmarks are presented on the pages that follow.

Consulting

Note: To interpret EF EPIc scores as concrete skills, refer to the definitions in the appendix.
Healthcare & Pharmaceuticals

<table>
<thead>
<tr>
<th>Country</th>
<th>EF EPic Score</th>
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<tr>
<td>Overall</td>
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<td>Sweden</td>
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<td>Norway</td>
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<td>Switzerland</td>
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<td>China</td>
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<td>Saudi Arabia</td>
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<td>Brazil</td>
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EF EPic Score
Note: To interpret EF EPic scores as concrete skills, refer to the definitions in the appendix.
Energy & Mining

Overall
Netherlands
Poland
Sweden
Norway
Finland
Denmark
Germany
Spain
China
Italy
Colombia
Mexico
Russia
Brazil
Saudi Arabia
France

EF EPIC Score

Note: To interpret EF EPIC scores as concrete skills, refer to the definitions in the appendix.
EF EPic Score

Note: To interpret EF EPic scores as concrete skills, refer to the definitions in the appendix.

Banking & Financial Services

- Overall
- Netherlands
- Norway
- Sweden
- Finland
- Denmark
- Poland
- Italy
- Germany
- Spain
- France
- China
- Mexico
- Brazil
- Russia

20 30 40 50 60 70 80
Technology

EF EPIC Score

Note: To interpret EF EPIC scores as concrete skills, refer to the definitions in the appendix.
Manufacturing

EF EPic Score
Note: To interpret EF EPic scores as concrete skills, refer to the definitions in the appendix.
Telecommunications

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<thead>
<tr>
<th>Country</th>
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<td>Overall</td>
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<td>Finland</td>
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<td>Colombia</td>
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<td>China</td>
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<td>Vietnam</td>
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<td>Brazil</td>
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Note: To interpret EF EPic scores as concrete skills, refer to the definitions in the appendix.
Food, Beverages & Tobacco

EF EPic Score
Note: To interpret EF EPic scores as concrete skills, refer to the definitions in the appendix.
Conclusions

English is an integral part of today’s interconnected global economy. For individuals, it is a basic skill determining employability and earning power. For companies, it is the difference between efficient cross-border operations and missed opportunities. For nations, it makes the workforce more agile, more appealing to foreign investors, more entrepreneurial. In every case English means communication, enabling those who master it to benefit from wider horizons and greater possibilities.

Some groups have embraced English. In Nordic countries the language is given serious attention in school. In China, millions of young professionals take English courses to improve their fluency. In many corporations, English is the a priori lingua franca, if not the official corporate language. Industries operating on a global scale such as travel and consulting consider English a basic skill when hiring. All these groups combine a pressing demand for English in the workplace with recruitment processes that reward, or assume, English fluency.

In less proficient groups, English is often sought-after, but rarely mastered well enough to communicate effectively at work. School systems carry much of the blame for the low levels of English proficiency among adults. The language is treated as a secondary subject or drilled using rote learning techniques that have little relevance for developing communication skills. Some countries are changing, but it takes decades for education reform to show results among adults. Professionals and business leaders can take the lead by helping their education ministries understand the opportunities that mastering English will provide. But executives cannot wait for children to grow up, and many companies are already actively training their employees to improve their English skills. These programs are necessary for any ambitious company looking for opportunities outside national borders. The EF EPIc data should allow companies to calibrate their objectives better by providing benchmarks for industries, seniority levels, and countries. Training and incentivization schemes must be carefully planned and regularly reviewed in order to improve corporate competitiveness.

There is little evidence that any of the trends making English so important are slowing or reversing course. The integration of global markets continues apace and the current economic slowdown in some countries appears to be pushing companies towards greater internationalization. Technology continues to develop, allowing access to ever more information and tighter collaboration across borders. In business, we have reached a tipping point where English skills are no longer an advantage—they are a prerequisite.

For more information contact corporate-enquiries@ef.com or visit www.ef.com/epic

See where your company ranks, take the test at: http://www.ef.com/english-test
## Appendix: Workplace Definitions of English Competency

<table>
<thead>
<tr>
<th>CEFR Stage*</th>
<th>EPIc Score Range</th>
<th>Description</th>
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| **C2**      | 94–100           | Upper Advanced  
Can use a high level of English in discussions, communications, and presentations. Can talk about and understand complex or sensitive issues within different forums. Can understand almost everything when hearing English at native speed, including colloquial references. Can understand high-level documents, correspondence, and reports, including the finer points of complex texts. Can write documents on any subject with high-level vocabulary, expression, and accuracy. |
| **C1**      | 79–93            | Advanced  
Can use English reasonably effectively in relationship-forming internally and with customers. Can contribute effectively to meetings and seminars within own area of work and keep up a conversation with a good degree of fluency, coping with abstract expressions. Can understand most English when spoken at native speed. Can read quickly enough in order to understand general meaning. Can avoid ambiguity when writing professional correspondence. |
| **B2**      | 63–78            | Upper Intermediate  
Can use English sufficiently to increase knowledge and skills and to understand customer needs. Can talk on a familiar topic and keep up a conversation on a fairly wide range of areas. Can understand the general message when hearing English at native speed. Can read and understand relevant information, and understand detailed instructions or advice. Can make notes while someone is talking and write an email including non-standard requests. |
| **B1**      | 49–62            | Intermediate  
Can use English for basic communication with customers and for sharing information with colleagues. Can express opinions or facts on abstract or cultural matters in a limited way. Can understand oral instructions and routine information and the general meaning of non-routine information within a familiar area. Can read and understand the basic message of most texts. Can write correspondence and make notes on familiar or predictable matters. |
| **A2**      | 34–48            | Elementary  
Can use English for very basic communication internally. Can express simple opinions, facts, or requirements in a familiar context. Can understand straightforward oral information within a familiar area. Can read and understand basic communications and other written materials of a non-complex nature but there may be gaps in understanding. Can write short simple sentences covering a limited range of topics. |
| **A1**      | 0–33             | Beginner  
Can express basic everyday facts. Can understand very simple oral information when spoken to directly and at a slow pace. Can read and understand very basic notices, instructions, or other information although there may be gaps in understanding. Can write very simple sentences including stating times, dates, and places. |

* CEFR refers to the Common European Framework of Reference for Languages: Learning, Teaching, Assessment (abbreviated as CEFR), a guideline used to describe achievements of learners of foreign languages.  
Note: all definitions refer to the highest level of proficiency within that band. Students at the bottom of a band will not be able to perform all the actions described for their band, but will have mastered those in the bands below.