

English in Brazil

An examination of policy, perceptions
and influencing factors



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Introduction

Brazil's unique position as Latin America's most populous country is perhaps best illustrated by the country's commitment to the Portuguese language in defining what it means to be Brazilian. The country has been shaped by centuries of inward migration, from the Portuguese colonisers to Africans brought originally into slavery to waves of European, Arab and Japanese immigrants, as well as those from Korea, China, Paraguay and Bolivia. The resulting diverse population is a distinct hallmark of Brazil, but a national commitment to linguistic sovereignty has restricted the country's competitiveness in the global market, especially in sectors where English is commonly used. The high profile "Science Without Borders" mobility programme designed to expand the reach of STEM is an example of a government attempt to internationalise, but the autonomy granted by the Federal Constitution to schools and universities acts as a barrier to change. While the teaching of foreign languages is now part of the curricular framework, limited teaching hours and lack of qualified teachers impede progress. A continued focus on simply raising the standards of general literacy and numeracy suggest Brazil is still a considerable distance from implementing a national policy that focuses solely on foreign language learning.

Methodology

Phase 1

Literature review

During the first phase of the research process we carried out an extensive literature review of current knowledge and available data to shape our research design and situate our investigation in the current context.

Phase 2

Desk research and secondary data collection

Working with local language analysts, we compiled extensive background information on the local education and policy environment during phase two. An audit of secondary data sources framed the structure and design of our later primary data collection phase.

Phase 3

Quantitative primary data collection

During phase three we collected primary data through two main channels:

- An online survey of 2,002 people from the general Brazilian population sampling males and females mostly aged from 16 to 35 years old.
- An online survey of 116 Brazilian employers varying in size from 10 to over 1,000 employees with the sample taken from managerial and executive level staff.

Phase 4

Qualitative primary data collection, in-depth stakeholder interviews

The final phase of our research and data collection involved a series of face-to-face and telephone stakeholder interviews carried out in Sao Paulo and Rio de Janeiro.

Interviews

Government

- International affairs director, CAPES – Brazilian Federal Agency for Support and Evaluation of Graduate Education
- Head of international affairs, State Secretariat of Education, São Paulo
- Anonymous, Secretary of Education of Sao Paulo, Division of International Education
- Coordenadoria Tecnica, Prefeitura Municipal do Rio Grande, Rio de Janeiro
- Coordenadoria de Educacao, Equipe Tecnica de Lingua Inglesa, Prefeitura Municipal do Rio Grande, Rio de Janeiro

Education institutions

- Coordinator, International Affairs Office, Federal University of Rio de Janeiro
- Language Coordinator, FAETEC - Technical School Support Foundation, Rio de Janeiro
- Professor, Departamento de Letras Modernas, Universidade de São Paulo
- Professor, Departamento de Letras Modernas, Universidade de São Paulo
- Professor, Departamento de Letras Modernas, Universidade de São Paulo
- Professor, Universidad de São Paulo
- Literature Department Manager, Universidade Deferal de Ouro Preto
- Professor, Universidad Estaduad de Campinas, Campinas
- International Relationship Officer, Pontificia Universidade Catolica de Minas Gerais

Education professionals

- Development Editor - Online Learning, British Council, Rio de Janeiro
- Global English Advisor, British Council, Rio de Janeiro
- Deputy Director English, British Council, Sao Paulo
- Country Director Brazil, British Council, Sao Paulo
- Director English, British Council, Sao Paulo
- Senior Director English and Exams, British Council, Sao Paulo
- Independent English language consultant, Rio de Janeiro
- Programas Internacionales y Traducccion, Global Affairs, Universidad Panamerica
- Professor, Universidad Autonoma, Metropolitana, Xochimilco

English language schools

- CNA Director, Sao Paulo
- Academic Coordinator, Cultura Inglesa
- Anonymous , CCAA

Human resources and recruitment professionals

- Lead Human Resources Advisor, BG Brasil, Rio de Janeiro
- Human Resources intern, BG Brasil
- Regional Marketing Director Latin America, Page Group Sao Paulo

Professional associations

- President, BRAZ-TESOL, Sao Paolo

English learners

- One focus group of five students aspiring to take IELTS Academic Exam, Sao Paulo
- One focus group of five students aspiring to take IELTS General Training Exam, Sao Paulo

Olympic Committee

- Interpretation services manager, Rio 2016 Organising Committee for the Olympic and Paralympic Games
- Head of press operations, Rio 2016 Organising Committee for the Olympic and Paralympic Games

Key findings

- There is a positive correlation between level of education and English as well as higher incomes and English learning.
- Respondents mostly took English lessons at secondary school (71%) and private English language schools (54%).
- Fifty-one per cent of survey respondents said they learned English because it was mandatory in their secondary school and 48 per cent learned for better employment prospects. Of the latter group, just nine per cent stated the skill was actually necessary for their job.
- Brazilian English speakers are more confident in their reading abilities as compared to their writing and speaking skills.
- English without Borders, part of the larger Idiomas sem Fronteiras (Languages without Borders), was borne after Science without Borders uncovered the lack of English language proficiency at the tertiary level.
- Many young people now believe English is part of their personal growth.
- The majority of respondents (61%) said the reason why they did not learn English was because it was too expensive; other reasons include a general lack of time and the perception that results take a while to achieve.
- Eighty-two per cent of Brazilian respondents who have not learned English stated they would do so in order to improve their employment prospects. Further, English learners and non-learners alike value English most for its links to increased employability.
- English is needed more in Brazil's internationalised industries, including Financial and Professional Services, and less in those that are largely local, such as Property, Real Estate, Construction and Engineering.
- Thirty-one per cent of surveyed employers offer English language training for their staff.
- Roughly eighty percent of jobs acquired through executive head hunters formally require English.
- English is considered a luxury by some and an extracurricular activity by others. In general, basic education is prioritised first, followed by higher education, and then English.

Macro analysis

The Constitution of the Federative Republic of Brazil

Brazil is a federal republic with 26 states and a federal district. The 1988 Constitution of the Federative Republic of Brazil provides the framework for the organisation of the Brazilian government and for the relationship of the federal government to the states, to citizens, and to all people within Brazil. It was written as a reaction to the previous period of military dictatorship and sought to guarantee individual rights and restrict the state's ability to limit freedoms, to punish offences and to regulate individual citizens' lives. The constitution grants broad powers to the federal government, made up of executive, legislative, and judicial branches.

Education is regarded in the Brazilian Constitution as:

'a right that belongs to everybody; the duty of the State and of families, promoted and stimulated with the cooperation of society, with a view to the full development of the individual for the exercise of citizenship and the preparation for work.'

Article 206 of the constitution stipulates that education shall be provided on the basis of the following principles:

1. Equal conditions of access and permanence in school
2. Freedom to learn, teach, research and express thought, art and knowledge
3. Pluralism of pedagogic ideas and conceptions and coexistence of public and private teaching institutions
4. Free public education in official schools
5. Appreciation of the value of teaching professionals, guaranteeing, in accordance with the law, career plans for public school teachers, with a professional minimum salary and admittance exclusively by means of public entrance examinations consisting of tests and presentation of academic and or professional credentials, a single legal regime being ensured for all the institutions maintained by the Union
6. Democratic administration of public education, in the manner prescribed by law
7. Guarantee of standards of quality

The Federal Constitution recognises three education systems organised hierarchically in accordance with the nationally defined bases and guidelines, each one maintaining its autonomy within the country's federal agreement. The three systems are: the federal system, the state systems and federal district system, and the municipal system¹.

National Education Guidelines and Framework of Law of 1996

According to the National Education Guidelines and Framework Law of 1996 (Lei De Diretrizes e Bases da Educacao – or the LDB) 'national education, inspired by the principles of freedom and by the ideals of human solidarity, has the purpose of a) understanding individual rights and responsibilities, as well as those of citizens, the State and other community groups; b) respecting the dignity and fundamental freedoms of human beings; strengthening national unity and international solidarity; c) preparing individuals and the society to master scientific and technological resources which will allow the use of the existing possibilities for common welfare; d) protecting, disseminating and expanding the cultural heritage; and e) condemning any

¹ UNESCO, "World Data on Education", April 2010. Retrieved from: http://www.ibe.unesco.org/fileadmin/user_upload/Publications/WDE/2010/pdf-versions/Brazil.pdf

unequal treatment resulting from philosophical, political or religious beliefs, social class, or racial prejudices.’

At a federal level, as well as within the Constitution of 1988, the National Education Guidelines and Framework Law no. 9.394, approved in December 1996, contained new features and a large number of measures that changed education considerably in Brazil. This law provides for the decentralisation and autonomy of schools and universities, which are responsible for drafting and implementing their pedagogical proposals and managing their personnel, materials and financial resources. The LDB stipulates that the Union, the states and the municipalities must organise their respective school systems in a collaborative way and decide their respective administrative responsibilities.

Detailed within the Constitution is the guarantee of compulsory and free primary education for all, including those who did not have the opportunity to access school at the proper age. It also guarantees a shift to a free and compulsory secondary education. According to Constitutional Amendment no. 59 written in November 2009, the duration of compulsory education will increase from nine to 14 years, from ages four to 17, a process that should be completed by the states and municipalities by 2016. On the basis of this process it is now a constitutional obligation to ensure that 18 per cent of national revenue, after deducting transfers, is invested in education. This figure seems to also be given as a guideline.

The National Curriculum and Common National Base

Historically the definition of education programmes has been the responsibility of the states, taking the form of non-compulsory curricular proposals designed with the aim of helping schools organise their teaching programmes. Until 1995 there was neither a national curriculum nor guidelines for its preparation. After a broad consultation period with a number of education stakeholders in 1995 the curriculum for the first four grades of primary school and accompanying teacher training were created. Between 1995 and 1998 one of the Ministry of Education’s priorities was to generate reference points for the primary curriculum by gathering ideas for reform that were already being used in various states and municipalities. This process was adopted with the aim of creating a democratic and participatory spirit in the adoption of the basic education national curriculum in Brazil. In 2010 the National Education Council approved national curriculum guidelines or parameters for early childhood, primary, secondary, indigenous, adult education and teacher training².

As part of the curriculum development process the following documents were produced: National Curriculum Parameters (PNC) for primary education; National Curricular Guidelines for early childhood education; National Curricular Guidelines for adult education and National Curricular Guidelines for indigenous education. The National Curricular Parameters can be used by state and municipal secretariats of education in the process of defining or revising their proposals, which are adapted according to the needs and characteristics of their contexts. The guidelines do not include lists of compulsory content but provide an overview of each subject area allowing the secretariats of education, schools and teachers to revise the subject content taught and choose what they view as more important topics.

The LDB describes the construction of the curriculum in primary and secondary education as having a ‘Common National Base which is complemented in each education system and teaching establishment, by a differentiated section answering the regional and local characteristics of the society, culture and economic life of the target group’. The LDB also stipulates that the Common National Base must include:

‘Portuguese Language and Mathematics studies, the knowledge of the physical and natural world as well as the social and political reality, especially of Brazil, the teaching of Arts [...] in such a way as to promote the cultural development of students, and Physical Education, as incorporated into the school’s pedagogical project.’

Subsequent amendments to the legislation specified curriculum content to include ‘diverse aspects of the history and culture that characterise the formation of the Brazilian population, beginning with these two ethnic groups, such as the study of the history of Africa or Africans, the struggle of the black and indigenous peoples in Brazil, the Brazilian black and indigenous culture and Indians in the formation of national society, recovering their contribution in the social, economic and political areas, pertinent to the history of Brazil.’

² UNESCO, “World Data on Education”, April 2010. Retrieved from: http://www.ibe.unesco.org/fileadmin/user_upload/Publications/WDE/2010/pdf-versions/Brazil.pdf

Government policy for modern foreign languages

The National Education Guidelines contain the framework under which foreign language learning is detailed. Modern Foreign Languages are to a certain extent given a degree of importance within the guidelines not previously granted. Often viewed as an inessential element of the curriculum, they have now gained the same status as any other course in the curriculum from the student's individual development viewpoint. Foreign languages are described within the National Education Guidelines as part of the wealth of knowledge that is essential to allow students to draw closer to different cultures and, as a result, allow their fully-fledged inclusion in a globalised world³. According to the guidelines at least one foreign language is compulsory at the secondary school level⁴.

Foreign languages at the average school have been almost entirely based on the study of grammatical formulae; the memorisation of rules and a focus on written language give little context to students' practical application of the language. Now as part of a major section of the National Curricular Guidelines – Languages, Codes and Related Technologies – it is hoped that Foreign Languages can play a more significant role as an essential means of international communication, as recognised in the national guidelines.

Although the legislation demonstrates an awareness of the practical nature that the teaching of foreign languages should take, this has not always been the case. Factors such as the limited number of hours allotted to the study of foreign languages, coupled with a lack of teachers with the linguistic and pedagogical background required have accounted for the non-enforcement of the legislation. Therefore, instead of training the student to speak, read and write in a foreign language, classes at secondary level often ended up taking on a repetitive character which can deprive both students and teachers of motivation for learning.

As shown by the terminology used within the National Education Guidelines, the Brazilian government guideline suggests that schools must focus on the teaching of Modern Foreign Languages, not English alone. Therefore in many schools English is one of a number of languages that students can opt to study. The autonomy schools and universities have to implement their pedagogical proposals and manage their personnel, materials and financial resources in achievement of the Common National Base has created an environment in Brazil in which many students in public schools have little or no exposure to English language learning. The degree of exposure to English in public schools varies considerably across Brazil's diverse geography, especially in rural communities where Portuguese is spoken second to indigenous languages; it is largely dependent on the federal, state or municipal application of the National Curricular Parameters.

Federal, state and municipal government policy implementation

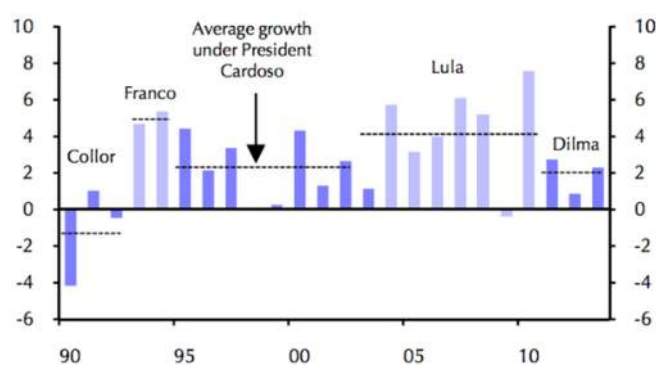
The devolved administrative responsibility for the development and implementation of the National Curriculum Parameters, or PNC, empowers the municipalities, the states, the federal district, and the federal government to develop programmes that they feel fulfil the goals of the Common National Base, applying the framework or guideline documents to the regional and local characteristics of the society, culture and economic life of the target group, as stipulated by amendments to the constitution.

At a federal level this is led by the current Brazilian President Dilma Rousseff and her appointed Cabinet. President Rousseff's first term in government ended in October 2014, when she was re-elected in a close race. As Brazil's current leader reach this milestone, she was increasingly compared to her predecessors, the most recent of whom was her mentor and fellow leftist Luiz Inácio (Lula) da Silva. Lula is now viewed as the President that led Brazil from a developing country to one of the rising global economic stars dubbed the 'BRIC' nations in 2001, whose growth became symbolic of the shift in economic power from the G7 to the emerging economies of the world.

³ Brazil Ministry of Education, "National Curriculum Parameters". Retrieved from: <http://portal.mec.gov.br/seb/arquivos/pdf/pcning.pdf>

⁴ UNESCO, "World Data on Education", April 2010. Retrieved from: http://www.ibe.unesco.org/fileadmin/user_upload/Publications/WDE/2010/pdf-versions/Brazil.pdf

Brazilian GDP growth year on year under consecutive leadership



Source: Thomson Datastream, Capital Economics Latin America Focus

However, whilst President Rousseff retained popularity during her first four-year term, the country was perceived as having entered an economic rut both internally and internationally. Growth had been slower, inflation higher and the country witnessed for the first time in decades nationwide protests in all 27 states from an estimated one million Brazilian citizens spanning all social classes, particularly the growing middle class. Protests were fuelled by the growing frustration with inadequate provision of social services in Brazil. Despite the rise of over 40 million Brazilians out of poverty to form the nova Classe C, described as having comfortable access to a middle class consumer market, government policies have been criticised as being no more than vote-winning strategies, whilst corruption is reported to still be rife. The priority in government spending given to two global sporting events hosted by Brazil, the 2014 World Cup and the 2016 Rio Olympics, has also featured within the discourse of Brazilian protesters' dissatisfaction with government policies.

Federal English language initiatives

There is minimal involvement on the federal level with foreign language training. However an important programme launched in July 2011 attracted significant global media attention to Brazil with a focus on the development and progression of the country's research and development capacity. The *Ciencia sem Fronteiras*, or Science without Borders programme, is described as being motivated by major challenges faced by Brazil: the growing need for high level research capacity within the population; the need for better interaction between academia and industry; the promotion of international collaboration and the aim of increasing the rate of patent applications. The main goal of the programme itself was to promote the consolidation and expansion of science, technology and innovation in Brazil by means of international exchange and mobility, specifically by placing 101,000 qualified Brazilian students and researchers in top universities worldwide by 2014. A new phase is being supported in 2015. The funding for the programme was significant and gave students the opportunity to study in universities in partner countries, with the largest numbers going to the US, UK, Portugal and Spain.

Launching such a significant programme that attracted the attention of the world's higher education community and global media did not come without apparently unexpected consequences and the need to make subsequent changes and improvements. The Federal government had to make adjustments to the programme to deal with the reality of student expectations and levels of ability, for example the demand for courses of study in Portugal from an unprecedented number of students led to a cap on numbers, as over 30,000 students signed up to study there. In a March 2014 interview Professor Paulo Speller, the Brazilian Higher Education Secretary, commented;

'There was huge demand to study in Portugal, and we eliminated the country from the list of options for students enrolled in undergraduate sandwich programs. There were 30,000 signed up to go, and the idea is that the students have the opportunity not only to live in another country, but also to develop fluency in another language, in particular—although not exclusively—in English. We realized that a large number of students did not have the necessary fluency in English, so we created a new program called English without Borders, which is currently operating in all, or virtually all, the federal universities. There are 63 federal universities, including the four that were recently created⁵.'

⁵ UNICAMP Ensino Superior, "Interview with Paulo Speller, Brazilian higher education secretary", June 2014. Retrieved from: <http://www.revistaensinosuperior.gr.unicamp.br/entrevistas/interview-with-paulo-speller-brazilian-higher-education-secretary>

The English without Borders language programme was developed as an unexpected consequence of the huge funding and emphasis put on the Science without Borders initiative. During a number of stakeholder interviews held as part of this study, it was stressed that the Brazilian academic community did have a level of awareness of the lack of English proficiency that would prevent Brazilian students from studying in English-speaking institutions, but this was not taken into account when the programme was first launched. English without Borders, comprising either English language study prior to going overseas, via distance education, or in some cases provided by the partner institution in the destination country before undertaking study, has been described as very popular amongst students and teachers. During an interview with a Brazilian university representative involved with the English without Borders programme, he explained that the next development would be to expand the programme to cover other foreign languages, creating Languages without Borders, or *Idiomas sem Fronteiras*. It is important to note students do not need to be enrolled in Science without Borders to participate in Languages without Borders.

State English language initiatives

Each state has its own framework for provision of foreign languages, but evidence of these programmes is difficult to access, further lending evidence to the impenetrability of Brazilian systems. However, one can look at the state of Sao Paulo to begin to understand the scale of state-led English initiatives.

In the State of Sao Paulo there are over 5,500 schools, 4.3 million students and over 230,000 teachers. In 2013 a number of pilot projects were launched for the teaching of English and other foreign languages. Early Bird: English for the early years is aimed at English language learning for first, second and third years of primary school. The programme was modelled on similar initiatives running in the Netherlands and is being supported by the University of Rotterdam and the National Centre for Early Knowledge of English. The programme aims to develop skills of listening, understanding and speaking in children. The project will be supported in its first phase by the private sector training approximately 40 teachers. Phase two will expand this with the aim of training 1,000 English language teachers.

In Sao Paulo state they have also developed a Centre of Language Studies aimed at middle school and high school students. The Centre does not focus only on English teaching, but offers students the chance to learn one of seven languages. Spanish is by far the most popular, followed by English:

Language	Number of students
Spanish	47,677
English	9,451
French	3,561
German	1,491
Italian	1,338
Japanese	1,292
Mandarin	251
Total	65,061

Source: Ministry of Education, Sao Paulo

The State Secretariat of Education in Sao Paulo has also piloted a Virtual School Educational programme, the purpose of which is to provide regular educational programmes and training in situations that demand assistance to meet the requirements of specific population groups. The EVESP programme focuses on high school students and all Secretariat employees developing courses in accordance with the national curriculum guidelines and resolutions of the State Council of Education, one element of which is Online English. In 2012 they provided 50,000 places, which grew to 60,000 in 2013. Finally the state government began a pilot International Mobility Program in 2013 for high school students. Targeting public school students, the first visits in 2013 took place in Argentina by 128 students, France by 40 students and England with 60 students. This programme was developed to improve the international competitiveness of public school students in Sao Paulo state.

Municipal English language initiatives

Just as information on state-level English frameworks was difficult to come by, so it was at the municipal level. One city, however, that has made concrete moves towards incorporating English into its basic education system is Rio de Janeiro.

In 2009 the municipal government introduced a programme called Criança Global, or Global Child, that requires public schools in Rio de Janeiro to teach English to all children between the ages of six and eight. According to the diagnosis performed in 2009, foreign language lessons in the city's schools were limited to the second half of basic learning (sixth to ninth year), which restricted the fluency of the students. English, Spanish, and French were offered as options, which entailed an additional difficulty as it was not always possible to ensure that students could concentrate their foreign language studies on a single language during this entire period. The Rio Criança Global program establishes teaching English as a foreign language as the priority, with the aim of consolidating this language in the city's schools by 2016⁶. The investment in the programme is estimated at around R\$ 151.4 million, or almost £ 40 million.

The government programme was reportedly put in place in order to "prepare these children so that they can actively participate in the opportunities that will open up because of the Olympics," according to a statement from Claudia Costin, Secretary of Education⁷. Hosting two major global sporting events in Brazil, and more specifically the city of Rio de Janeiro, seems to have catalysed the government to proactively promote English language learning. However, there seems to be very little awareness of this programme.

Capturing far more attention from the global media have been the English programmes designed for people working in industries that will be affected by large numbers of tourists in Brazil for both the World Cup and the Olympic Games. In June 2012, the Ministry of Tourism and the Ministry of Education launched a program called Pronatec Turismo. Through the training programme, 166,000 professionals working in the tourism industry have signed up to take 160 hours of English or Spanish classes for free in one of 120 cities that will either host games or are deemed tourist destinations. Each of the 54 courses offered was designed to help employees working in specific sectors, such as tourism, hospitality, management and business, educational and social development, environment and health, information and communication, food production, cultural and design production, and security.

Administration and management of the education system

At the pre-elementary level, there are approximately 94,000 institutions, with 5,718,900 students enrolled. At the elementary level, there are approximately 197,000 schools, with 36 million students. Secondary education enrolments in Brazil amount to approximately 20 million students with 13 million in lower secondary and seven million in upper secondary. Higher education is provided by 35 federal universities, 15 state universities, two municipal universities and 31 private universities, as well as other institutions - seven federations and 788 independent establishments - of which 607 are private, while the remainder function at municipal (90), state (72) or federal (19) level.

The responsibility for public education in Brazil is primarily divided as follows⁸: the Federal Constitution lays down that the states and municipalities are obliged to spend at least 25 per cent of income from tax revenues on education, 60 per cent of which must go on primary education.

⁶ The Municipal Olympic Company, "Rio Criança Global". Retrieved from: http://www.cidadeolimpica.com.br/wp-content/themes/cidadeolimpica_v3/projetos/EOM/en/projeto-riocriancaglobal.php

⁷ Langlois, J., "Brazil learns to speak English", *Global Post*, 5 October 2011. Retrieved from: <http://www.globalpost.com/dispatch/news/regions/americas/brazil/111004/brazil-english-language>

⁸ UNESCO, "World Data on Education", 2006. Retrieved from: http://www.oei.es/pdfs/Brazil_datos2006.pdf

Structure of the education system and education authorities (2008)

GENERAL PROGRAMME	SPECIFIC PROGRAMME	INTERNATIONAL DENOMINATION	GRADE/YEARS	THEORETICAL AGE	AUTHORITY
Basic education	Early childhood education	Initial education	4 years	0-3	Municipalities
		Pre-school	2 years	4-5	
	Primary education (compulsory)	Elementary education	1st grade	6-10	Municipalities states
			2nd grade		
			3rd grade		
			4th grade		
			5th grade		
		Lower secondary school	6th grade	11-14	
			7th grade		
	8th grade				
	Secondary education	Upper secondary	9th grade	15-17	States
1st form					
2nd form					
Vocational and technological education	Upper secondary education	3rd form	15-17	States	
		Forms 1-3			
Higher education	Sequential courses (specific)		1,600 hours	18 or older	Federal government
	Complementation courses		Variable		
	Graduate	Bachelor's	2,400 hours		
		Higher Diploma	2,800 hours		
		Technological Diploma	1,600 hours		
	Postgraduate	Master's	2 years		
		PhD	2 years		
		Professional degree	3 years		
Specialisation courses (certificate)		360 hours			

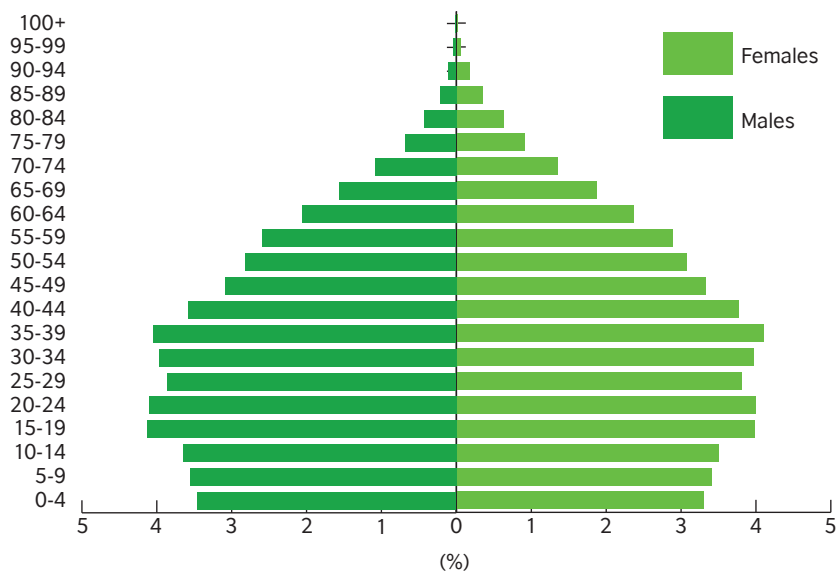
Source: Ministry of Education, 2008

The municipalities must offer free early childhood and primary education in their jurisdictions and must regulate the provision of early childhood education in private day care and pre-school institutions. The states must offer free primary and secondary education and regulate private provision. The federal district is responsible for the provision of early childhood, primary and secondary education, the federal government must offer free higher education in its institutions and regulate the provision of the private sector.

Education indicators

Brazil is the largest country in South America and the fifth most populous in the world, with an estimated population of over 200 million people in 2014. Brazil is currently quite a young country with the largest proportion of the population aged between 16 and 24 years old. Today it is estimated that over 60% of the population are aged 29 years or under.

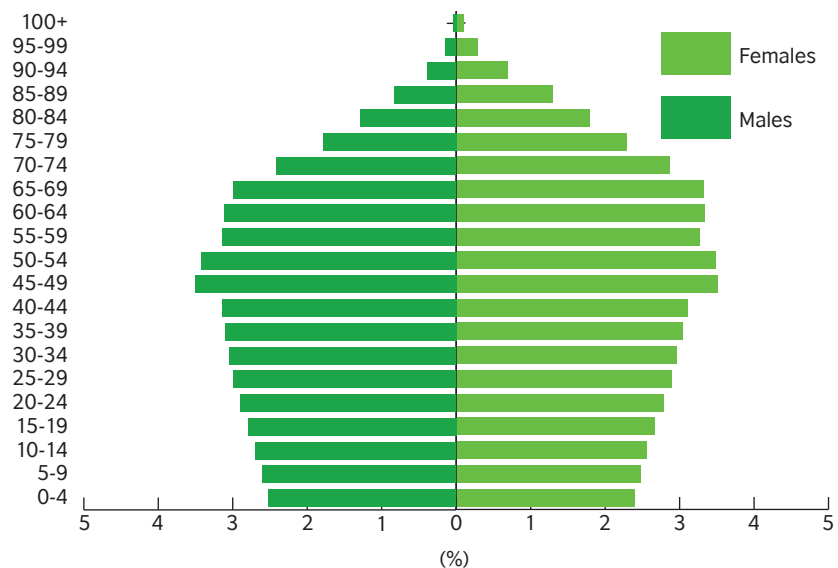
Brazil population projections, 2020



Source: UN Populations Division 2014

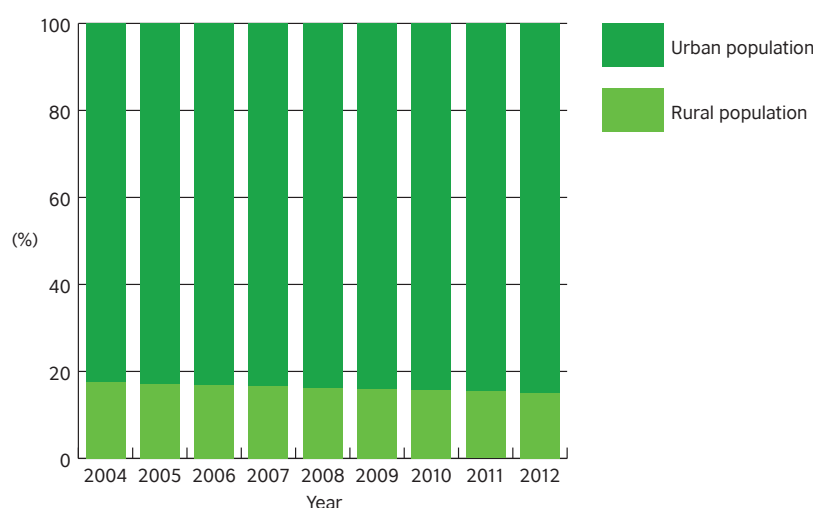
Population growth in Brazil is slowing and is estimated to peak at about 230 million in around 2055. This is a large part due to the fast development of Brazilian society, growth of the middle C class and access to improved health care services.

Brazil population projections, 2050



Source: UN Populations Division 2014

Approximately 19 per cent of the total population, or roughly 36 million people, live in rural areas of Brazil. In the country as a whole, about 35 per cent of the population lives in poverty, on less than two dollars a day. But in Brazil's rural areas poverty affects about 51 per cent of the population. This means that Brazil has about 18 million poor rural people, the largest number in the western hemisphere. And Brazil's Northeast region has the single largest concentration of rural poverty in Latin America. The Northeast is the country's poorest and least developed region and the focus of The International Fund for Agricultural Development's operations. In this region, 58 per cent of the total population and 67 per cent of the rural population is poor⁹.



Source: World Bank 2014

Government spending on education

All three levels of government in Brazil, the municipal, state and federal, are involved in the financing and provision of all levels of public education. The Secretariats of Education for each state are responsible for administering the network of schools belonging to those states and to the Federal District, as well as for the supervision of the private network. At the state level, standards are set by the State Education Councils. Brazil's public investment in education increased steadily during the last decade. Between 2000 and 2010, public expenditure on education as a percentage of GDP increased by 2.1 percentage points, from 3.5 per cent in 2000 to 5.8 per cent in 2010 but still remains below the average for OECD countries of 6.3 per cent¹⁰.

Government expenditure on education as a per cent of GDP

2004	2005	2006	2007	2008	2009	2010
4.0	4.5	5.0	5.1	5.4	5.6	5.8

Source: UNESCO Institute for Statistics

Increased investment is in part due to the creation in 1998 of the basic education equalisation fund¹¹, Fundo de Desenvolvimento do Ensino Fundamental (FUNDEF). It aimed to address ongoing disparities in education through a threefold strategy: firstly it guaranteed a minimum level of spending per student in primary education; secondly it introduced a federally mandated system of redistribution within states and a federally managed top-up fund; the third key feature was a mandate that 60 per cent of the total per student allocation be spent on teacher salaries and 40 per cent on other operating costs.

⁹ The International Fund for Agricultural Development, Retrieved from: <http://www.ifad.org/>

¹⁰ OECD, "Education at a Glance 2013 Country Note," 2013. Retrieved from: http://www.oecd.org/edu/Brazil_EAG2013%20Country%20Note.pdf

¹¹ Bruns, B., David Evans and Javier Luque, "Achieving World Class Education in Brazil: The Next Agenda", The World Bank, 2012. Retrieved from: <https://openknowledge.worldbank.org/bitstream/handle/10986/2383/656590REPLACEMENT0hieving0World0Class0.pdf?sequence=1>

Expenditure on levels of education as per cent of government expenditure on education

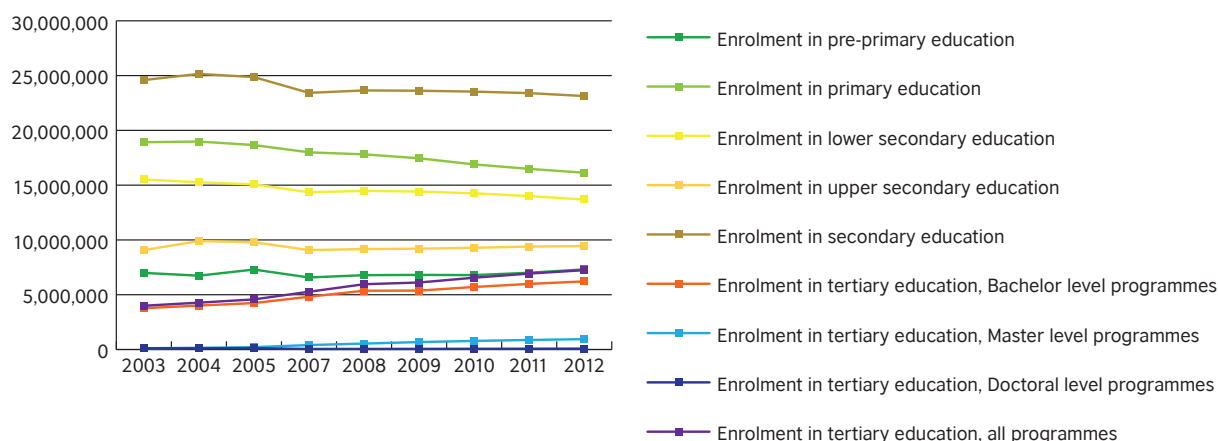
	2004	2005	2006	2007	2008	2009	2010
Pre-primary	8.8	8.2	7.5	8.0	7.6	7.0	7.6
Primary	32.9	34.0	32.0	32.2	31.9	32.4	31.3
Lower secondary	27.9	27.7	30.7	30.1	30.7	31.1	29.7
Upper secondary	11.5	11.1	13.1	13.6	13.9	13.5	14.9
Tertiary	18.9	19.0	16.7	16.2	15.9	16.0	16.4

Source: UNESCO Institute for Statistics

Data from UNESCO shows that investment in primary education is highest at 31.3 per cent of total government expenditure on education which sits in line with the constitutional guarantee of compulsory and free primary education for all Brazilian citizens. This can be misleading, however, as the amount spent per student is significant lower at the school level as compared to the tertiary level. Government spending on public education has remained relatively consistent, with only upper secondary level receiving a fairly significant 3.4 per cent point increase in funding between 2004 and 2010, which also sits in line with the 1996 National Education Guidelines and Framework Law that stipulated a shift to free and compulsory secondary education. In October 2012 the Brazilian Congress approved a National Education Plan for the next 10 years setting a target for public education spending at 10 per cent of GDP by 2020, which if achieved would be the highest share of government expenditure on education in the world.

Enrolment in levels of education in Brazil

Statistics on Brazilian education are not easily available. The UNESCO Institute for Statistics does not have data on the gross enrolment ratios of Brazilian students in different levels of education. The available data shows the overall number of students in different levels of Brazilian education, as shown in the graph below:



Source: UNESCO Institute for Statistics

Educational attainment rates in Brazil have been rising over the past decade, but are still lagging far behind the average for OECD countries. The proportion of people with an upper secondary qualification has risen from 26 per cent among 55 to 64 year-olds to 53 per cent among 25 to 34 year-olds. In 2011, 43 per cent of 25 to 64 year-olds had attained this level of education, whereas across OECD countries 75 per cent had.

Schooling in Brazil faces two major shortcomings: short school days and severe lack of space. Most students go to school for a four-hour shift, either in the morning or in the afternoon, and teachers often travel from one school to another, delivering multiple lessons within the divided day. It is reported that this policy was put in place to counter the lack of school places and growing number of young people, but it has been described as a huge issue when considering the preparation of the

Brazilian population to compete in a global economy.

The results of the 2012 Programme for International Student Assessment (PISA), a triennial test that evaluates the abilities and competencies of 15-year-old students of participating countries, showed that although progress had been made in Mathematics since PISA 2003, Brazil only barely achieved position 58 in the ranking of 65 countries.

Tertiary attainment rates have also increased, but at a slower pace. They now stand at nine per cent among 55 to 64 year-olds and 13 per cent among 25 to 34 year-olds. At 12 per cent, Brazil's tertiary educational attainment rate for 25 to 64 year-olds remains well below the average of 32 per cent for OECD countries and 26 per cent for G20 ones.

English language learning analysis



Portuguese, a symbol of Brazilian identity, is spoken by nearly 100 per cent of the population and foreign languages, including English, are not widely used. The British Council in 2012 estimated that roughly 43 million people, or 21.28 per cent of the population were learning English in some form; these channels included formal education, both public and private, consisting of primary, secondary and tertiary, as well as private English language schools and self-access learning. Estimates suggested there are about 2.5 million people who are undertaking (or have the potential to undertake) face-to-face or blended English courses at private institutes and roughly 14.5 million with interest in self-access learning.

Source: British Council, Education Intelligence, Latin America Databank 2014

Public education English language penetration

Brazil has greatly expanded its basic education provision: the 2006 National Household Survey (Pesquisa Nacional por Amostra de Domicílios, or PNAD) indicates that roughly 99 per cent of students aged seven to ten are enrolled in pre-primary, primary, or secondary school. According to UNESCO, in 2012 enrolments for public education at all levels were as follows:

Enrolment in pre-primary education	5,193,414
Enrolment in primary education	13,576,652
Enrolment in lower secondary education	11,900,420
Enrolment in upper secondary education	7,767,928
Enrolment in secondary education	19,668,348

Source: UNESCO Institutes for Statistics

Despite nearly complete enrolment in basic education, there are systemic issues that plague the public education system including inadequate funding, diminished capacity and abbreviated school days. As previously mentioned, due to the unitary nature of the Brazilian system, implementation of programmes often falls upon local administrators and teachers who, according to the National Guidelines, are able to best interpret programmes in a contextually appropriate way. In reality, however, teachers are not well-prepared or trained to deliver new syllabi and pedagogies and little professional development exists; what is provided comes in the form of the multiplier method, wherein select teachers are trained and then expected to disseminate their new knowledge to their peers.

Funding is also an issue. Publically-funded education is free to students, and according to the OECD in 2011 the annual expenditure per student at the primary level was US\$2,778 and at the secondary level was US\$2,571; these expenditures were US\$5,000 and US\$7,000, respectively, below the OECD average that year and are significantly less than the amount spent per tertiary-level student¹². Many argue that the systemic issues in basic public education have arisen from the rapid growth in provision and enrolments and that, in time, these challenges will be resolved.

Provision of English at public schools remains poor for a number of reasons. It is difficult to recruit highly qualified teachers for the public system in Brazil¹³. The English teachers in Brazilian public schools are generally undertrained and overworked, with no formal English training beyond it being a part of a liberal arts college curriculum, if that¹⁴. On many occasions, teachers in other subject areas with extra time are asked to take on English classes. Anecdotally, students are often graded as having passed English classes in spite of poor performance in order for them to continue in the school system, therefore reinforcing the idea that English is not important in the public school setting.

Further to this is the fact that the level of English taught in schools is very low and often consists of beginner level books with grammar patterns and vocabulary by grade level. Teachers are encouraged to teach reading skills due to the difficulty in teaching speaking skills in a classroom setting. Classes are generally 45 minutes, once or twice a week and as a result, students do not practice English on a regular basis and seldom learn to be proficient in the language¹⁵. As a result, though these students may know grammar, they are not practised in comprehension or communication.

Private education English language penetration

The private education sector in Brazil is regulated by the public sector and educates 16 per cent of those in primary education and 15 per cent of those in secondary education. Generally, private school is expensive and as a result up to 80 per cent of students enrolled are from families of high socio-economic status; just five per cent, doubtless aided by government and external programmes, are from the lowest class.¹⁶ Enrolments in 2012, according to UNESCO, were as follows:

Enrolment in pre-primary education	2,120,750
Enrolment in primary education	2,558,237
Enrolment in lower secondary education	1,791,318
Enrolment in upper secondary education	1,674,406
Enrolment in secondary education	3,465,724

Source: UNESCO Institute for Statistics

Private secondary school costs roughly R\$2,756 per month, though this varies depending on school and region¹⁷. It is interesting to note that this estimate alone accounts for one half of the amount spent annually by the government on a student in the public education system.

Private schools do have a large degree of autonomy in management and administration and as a result, the quality of education is universally better than that in the public system, though many English language classes are also ineffective. In fact, bilingual schools, which are mostly privately run and offer the best quality all-around education, are also costly but are popular with a group of families who deduce that the schooling is roughly equivalent to the cost of private schooling and external English classes¹⁸.

Often, the private school curriculum, taught by better funded and motivated teachers, is shaped in order to best prepare students for the Vestibular, or university exam. In Brazil, there is a reversal of systems upon graduation from secondary schools; as the public tertiary system is considered of higher quality, those students who undergo private secondary education generally attempt to gain entrance to public tertiary education. This leaves the students from the public school system, if they are unable to perform well in the exams and gain entrance, with the choice between more costly private tertiary education, entrance to the workplace or other forms of higher education such as vocational education.

¹² OECD, "Education at a Glance 2013 Country Note," 2013. Retrieved from: http://www.oecd.org/edu/Brazil_EAG2013%20Country%20Note.pdf

¹³ EF Education First, "English Proficiency Index country profile: Brazil," <http://www.ef.se/epi/south-america/brazil/>.

¹⁴ Jill Langois, "Brazil learns to speak English," *Global Post*, 5 Oct. 2011, <http://www.globalpost.com/dispatch/news/regions/americas/brazil/111004/brazil-english-language>

¹⁵ Jill Langois, "Brazil learns to speak English," *Global Post*, 5 Oct. 2011, <http://www.globalpost.com/dispatch/news/regions/americas/brazil/111004/brazil-english-language>

¹⁶ Curi, A.Z. & Menezes-Filho, N.A. "Os determinantes dos gastos com educacao no Brasil," 2009.

¹⁷ Akkari, A. "Blurring the Boundaries of Public and Private Education in Brazil." *Journal of International Education and Leadership* 3.1 (2013). Retrieved from: <http://www.jielusa.org/wp-content/uploads/2012/01/Akkari-Final.pdf>

¹⁸ Euromonitor, 2014

Higher education English language penetration

As noted before, the public universities are perceived to offer the best quality education and as such, are inundated with students who were privately educated through basic and secondary school. However, public education cannot fulfil all demand and most tertiary provision in Brazil is private, accounting for the majority of tertiary institutions¹⁹. In order to enrol in the tertiary system, students take the Vestibular, a challenging and competitive entrance exam that varies according to the university being applied to; the exam is the main determinant of university entrance. The Vestibular tests a variety of subjects, sometimes including English, though anecdotally English reading comprehension is tested with the use of an English language passage and Portuguese language questions. There are no standard English entry or exit requirements for tertiary education in Brazil.

Tertiary enrolments have grown in the last decade, and increased 73 per cent from 2003 to 2011²⁰. As of 2012, students in higher education numbered:

Enrolment in tertiary education, Bachelor level programmes	6,217,023
Enrolment in tertiary education, Master level programmes	944,904
Enrolment in tertiary education, Doctoral level programmes	79,478
Enrolment in tertiary education, all programmes	7,241,405

Source: UNESCO Institute for Statistics

Roughly 80 per cent of students in higher education attended private institutions²¹ but those going to university remain a small portion of the population. As of 2011, 32 per cent of those aged 25 to 64 graduated from upper secondary school but just 13 per cent of those aged 25 to 34 had completed a higher education degree and according to the OECD, 39 per cent of today's youth is expected to complete tertiary education²².

Governance of public universities falls to the federal government or the state and annual expenditure per student is US\$13,137, nearly five times what it is for those in basic education²³. Generally, public universities have autonomy when it comes to budgets and policies however the concept of institutionalised internationalism is fairly new to Brazilian universities. Up to this point universities have internationalised by way of motivated faculties or staff with relationships abroad but a centralised, integrated effort and continuity in policies has been uncommon. There are unique challenges to traditional internationalisation in Brazil. For example, the best students in Brazil, who generally attend public universities may want to study abroad at the best universities in the UK; however, due to the price differential and uncertainty about whose responsibility it is to cover the costs, he or she may not do so. Further, despite the excellence of some Brazilian universities, foreign students studying in Brazil may have difficulties unless they are fluent in Portuguese. While universities do not prioritise English learning, those in masters and doctoral programmes especially in the sciences do tend to have an interest in English proficiency due to the fact that scientific research is primarily written and published in English.

¹⁹ ICEF Monitor, "Public and private sector investment aims to increase higher education participation in Brazil." 21 November 2013. Retrieved from: <http://monitor.icef.com/2013/11/public-and-private-sector-investment-aims-to-increase-higher-education-participation-in-brazil/>

²⁰ Arnold, J.M. and Joao Jalles. "Dividing the Pie in Brazil: Income Distribution, Social Policies and the New Middle Class. OECD, 9 January 2014. Retrieved from: [http://www.oecd.org/officialdocuments/publicdisplaydocumentpdf/?cote=ECO/WKP\(2014\)1&docLanguage=En](http://www.oecd.org/officialdocuments/publicdisplaydocumentpdf/?cote=ECO/WKP(2014)1&docLanguage=En)

²¹ Instituto Nacional de Pesquisa Educacional

²² OECD, "Education at a Glance 2013 Country Note", 2013. Retrieved from: http://www.oecd.org/edu/Brazil_EAG2013%20Country%20Note.pdf

²³ OECD, "Education at a Glance 2013 Country Note", 2013. Retrieved from: http://www.oecd.org/edu/Brazil_EAG2013%20Country%20Note.pdf

Commercial English language penetration

The private English school market in Brazil is a crowded one and English is seen by many as a stand-alone skill and expense, apart from general education. As a result of the inadequacies of English provision in the education system, there are a multitude of private language school options that compete for various demographics based on price, programme and curriculum. British Council estimates state that there are roughly 2.5 million Brazilians in or who have the potential to be in private English language training.

The sector sits outside and alongside the public sector, teaching millions of students English at all levels annually. In 2012, Data Popular, a Brazilian consumer intelligence service, stated that Brazil's rising middle class, of which only 20 per cent speak English, would spend up to US\$13.8 billion on education that year and estimated that language schools in the country would grow by 30 to 40 per cent over the following four years²⁴. In a recent Data Popular survey, 87 per cent of those in the middle class stated they have gone to private English schools.

Students who can afford private English schools or personal after-school tuition do invest in it²⁵. Currently, there are a plethora of private English language schools ranging from large chains to small local franchises. Most private schools are costly, with private lessons ranging from R\$50 to 100 (US\$26 to 53) per hour. This is generally out of the price range that can be afforded in a country where the minimum wage is roughly R\$724 (US\$310) monthly²⁶. That said, if it is at all affordable, students will enrol in private English schools²⁷. More affordable options do exist, however, and offer group classes ranging from R\$12 to 40 (US\$6 to 20) per hour²⁸.

The private English schools operate autonomously; they draw up their own curriculum and teaching methods and hire their own teachers. Many have digital and video modules. Classes can range from two hours per week to more intensive programmes that take up 12 to 15 hours weekly. Generally, schools offer group classes catering to four to six students per class that meet for three hours per week. However, classes can cater to up to 20 students²⁹. It is worth noting, as well, that there is an existing market for English books and materials alongside classes.

Private teachers are sometimes native speakers but more often are Brazilians who have travelled outside the country and used their English internationally. They normally have some level of fluency and technical language knowledge. In some cases, teachers have little to no experience with English in a natural setting. In general, there are not many native English speakers who have work permits to live and teach English in Brazil.

Marketing of English language schools in Brazil is commonplace; English schools are attuned to the marketplace and many offer courses that they believe will bring in the most clientele. For example, increasing numbers of businesses promoted English for Tourism in light of the World Cup in Brazil and, now, the 2016 Olympic Games. Others have publicised programmes that will allow adults to become proficient in Business English in a short amount of time.

Self-accessed English language penetration

Despite the fact that digital technologies are growing, just one per cent of the middle class in a recent Data Popular survey stated they would opt for online courses. Due to the breadth and diversity of face-to-face English language schools, self-access learning is anecdotally not the first choice for Brazilian students. However, according to British Council estimates, there are currently 14.5 million people in Brazil learning or with the potential to learn English through self-access or online learning.

According to estimates, the majority of learners listen to English language radio programmes though it is unclear if the goal of the programming is English language acquisition. In line with the popularity of books and materials from private schools, textbooks are the second most popular form of self-access learning in Brazil followed by the Internet and online materials.

Anecdotally, dropout rates for online-only courses are high and there is a history within Brazil of companies trying to set up online initiatives and then looking for bricks and mortar partners due to the loss of money and threats of closure.

²⁴ Rachel Glickhouse, "Lost in translation: English in Brazil," *The Christian Science Monitor*, 24 May 2012, <http://www.csmonitor.com/World/Americas/Latin-America-Monitor/2012/0524/Lost-in-translation-English-in-Brazil>

²⁵ EF Education First, "English Proficiency Index country profile: Brazil," <http://www.ef.se/epi/south-america/brazil/>.

²⁶ "Rousseff says Brazil raises 2014 minimum wage by 6.78 pct." *Reuters*, 23 December 2013. Retrieved from: <http://www.reuters.com/article/2013/12/23/brazil-economy-wage-idUSL2N0K21FW20131223>

²⁷ Jill Langois, "Brazil learns to speak English," *Global Post*, 5 Oct. 2011, <http://www.globalpost.com/dispatch/news/regions/americas/brazil/111004/brazil-english-language>.

²⁸ British Council, Education Intelligence, *Latin America Databank*, 2014

²⁹ British Council, Education Intelligence, *Latin America Databank*, 2014

International English language evaluation

There is not a history of exams or testing in Brazil, outside perhaps of the Vestibular, and as such the idea of benchmarking English language levels in-country is non-existent. As there are no national standards or levels of English in the curriculum it is difficult to comprehensively categorise levels of English proficiency. However, we can look to international exams and standards to better ascertain the levels of specific samples of the Brazilian population.

TOEFL

The Test of English as a Foreign Language, known as the TOEFL, is a commonly accepted test of English abilities that is accepted by universities globally. The test consists of four sections, Reading, Listening, Speaking and Writing. Each section is scored from 0 to 30 and each score is summed for a total score out of 120.

Reading	Listening	Speaking	Writing	Total
21	21	20	20	83

In December 2013, the average score for Brazil TOEFL examinees was 83. The average Writing and Speaking scores can be categorised as Fair, while the average Listening and Reading scores are Intermediate.

IELTS

The IELTS exam, which measures English language levels, is also accepted internationally for university admission and is the main competitor to the TOEFL. The IELTS is comprised of four sections, Listening, Reading, Writing and Speaking; a General Training version of the test is offered alongside an Academic version.

ACADEMIC				
Reading	Listening	Speaking	Writing	Overall
6.8	6.4	6.6	6.1	6.5
GENERAL TRAINING				
Reading	Listening	Speaking	Writing	Overall
6.3	6.4	6.8	6.2	6.5

Brazilian student performance on the IELTS in 2013 was competent, meaning that a student can communicate, especially in common situations but with some complex language, and with some errors.

Comparative English language levels

In order to better understand how each of the exams and results compare, we must examine the relationships between each of the standards. It is worth noting that despite the fact that Brazil does not utilise the Common European Framework of Reference for Languages (CEFR), we have used it as a touchstone for comparisons of not only the exam scores within Brazil but also in the region.

COMPARATIVE ANALYSIS OF LANGUAGE TESTS		
CEFR (Common European Framework of Reference for Languages)	TOEFL iBT	IELTS Academic
C2	120	9
C2	110	8
C2	105	7.5
C1	100	7
C1	90	6.5
B2	84	6
B2	80	6
B2	71	5.5
B1	61	5
B1		Between 4.5-5
A2		Less than 4

The range of TOEFL scores show a B2 proficiency amongst TOEFL test-takers, which is equivalent to a 6 IELTS Academic score. The 6.5 average IELTS Academic score is roughly equal to a C1 language proficiency.

It is important to note that the samples of people evaluated in the above exercise are dissimilar. Those taking the TOEFL and IELTS Academic test are presumably doing so to study abroad and as such probably have long histories of studying English and current proficiencies that would allow them to succeed in an English-speaking academic environment. Given that this exercise does not include the millions of people who have little to no contact or relationship with English, it is safe to assume that the above benchmarks are not representative of the entire population.

English learning motivations

As part of this research, we surveyed 2,002 Brazilians, mostly between the ages of 16 to 35, to better understand sentiments towards English language learning. The survey was administered in Portuguese. Through this questionnaire, we aimed to ascertain how occupation, levels of education and household income affect English language acquisition in Brazil. Further, we examined self-assessed levels of English as well as sentiments towards the language from learners and non-learners alike. By contrasting the responses from these samples, we gained knowledge of the similarities and differences in opinions as well as the overall value placed on English.

Age and gender of respondents

Age	Non-learners	English learners	% of total
Under 16	60%	40%	0%
16	64%	36%	1%
17	33%	67%	1%
18	43%	57%	3%
19	47%	53%	3%
20	44%	56%	4%
21	44%	56%	5%
22	41%	59%	5%
23	42%	58%	6%
24	47%	53%	5%
25	50%	50%	6%
26	58%	42%	6%
27	46%	54%	6%
28	50%	50%	5%
29	54%	46%	6%
30	55%	45%	7%
31	55%	45%	7%
32	48%	52%	6%
33	58%	42%	7%
34	52%	48%	5%
35	50%	50%	6%
36	67%	33%	0%
37	100%	0%	0%
38	0%	100%	0%
39	100%	0%	0%
41	100%	0%	0%
43	50%	50%	0%
46	0%	100%	0%

Source: British Council, Education Intelligence, Latin America Databank 2014

Gender	Non-learners	English learners	Total
Female	46%	54%	51%
Male	54%	46%	49%
Total	50%	50%	100%

Source: British Council, Education Intelligence, Latin America Databank 2014

The majority of respondents were aged between 18 and 35, accounting for 98 per cent of the total sample. The proportions of English learners to non-learners are fairly equal, though generally there are a slightly higher proportion of learners of those aged below 26 years old and a slightly higher proportion of non-learners for those aged over 29. Teenagers aged 16 and under had a higher percentage of non-learners but this differs from those aged 17 and above. Due to the small sample of those over 35 years old, no conclusions can be made regarding the percentage of English language learners for these age groups.

Of the 2,002 respondents, 51 per cent were female and of that sample, 54 per cent were English learners. Forty-nine per cent of respondents were male and of that group, 46 per cent were English language learners.

Proportion of respondents that have studied English by state

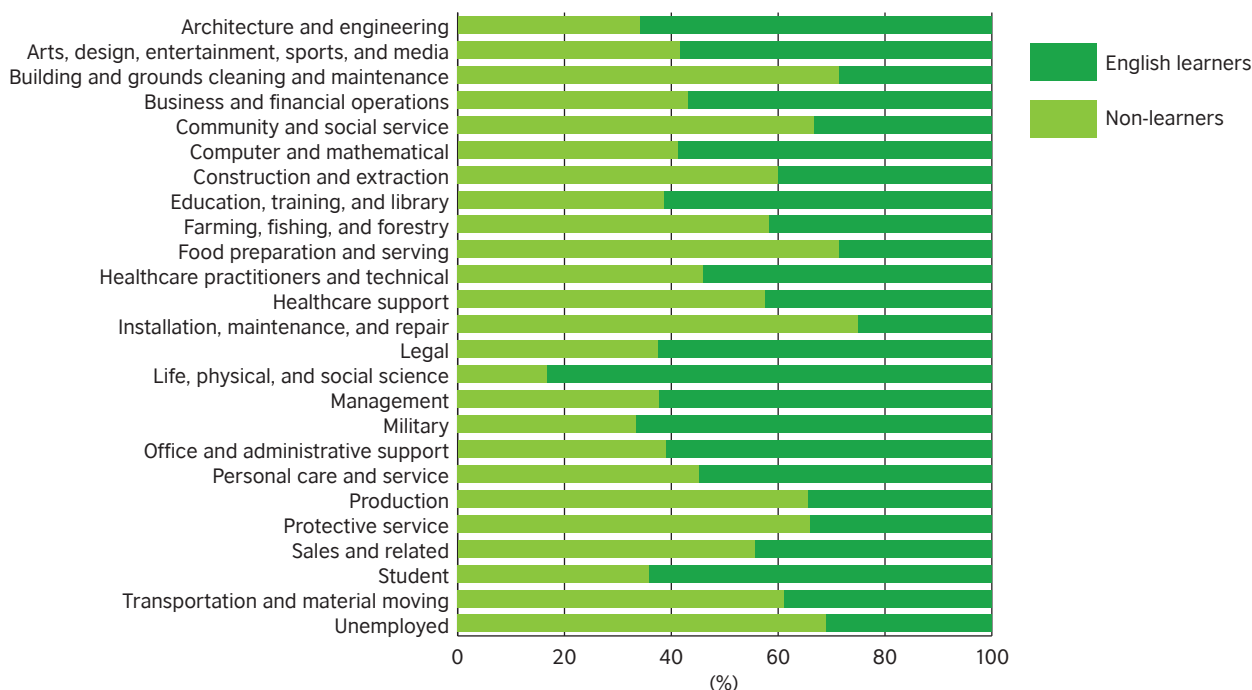
This chart represents the proportion of respondents from our primary data that indicated they are learning or have learned English by their state of residence. The states that had the highest percentages of English learners were Paraíba, Rio Grande do Norte, Ceara, Distrito Federal and Tocantins. Those that had the lowest proportions included Rondônia, Alagoas, Maranhão, Goiás and Mato Grosso.

State	Per cent of respondents that have learned English
Acre	50%
Alagoas	33%
Amapá	33%
Amazonas	40%
Bahia	43%
Ceará	62%
Distrito Federal	61%
Espírito Santo	56%
Goiás	38%
Maranhão	33%
Mato Grosso	38%
Mato Grosso do Sul	46%
Minas Gerais	50%
Pará	48%
Paraíba	80%
Paraná	53%
Pernambuco	56%
Piauí	50%
Rio de Janeiro	52%
Rio Grande do Norte	72%
Rio Grande do Sul	52%
Rondônia	20%
Roraima	100%
Santa Catarina	47%
São Paulo	49%
Sergipe	47%
Tocantins	60%

Source: British Council, Education Intelligence, Latin America Databank 2014

Occupation and English language learning

Respondents were asked to identify the industry they work in from a provided list; this selection was cross-referenced with the respondents' English learning experience.



Source: British Council, Education Intelligence, Latin America Databank 2014

The industries that had the highest proportion of English language learners were Life, physical and social science (83%), Military (67%), Architecture and engineering (66%), Students (64%), Legal (63%) and Management (62%). Education, training and library (61%) also had a higher proportion of English learners as did Office and administrative support (61%).

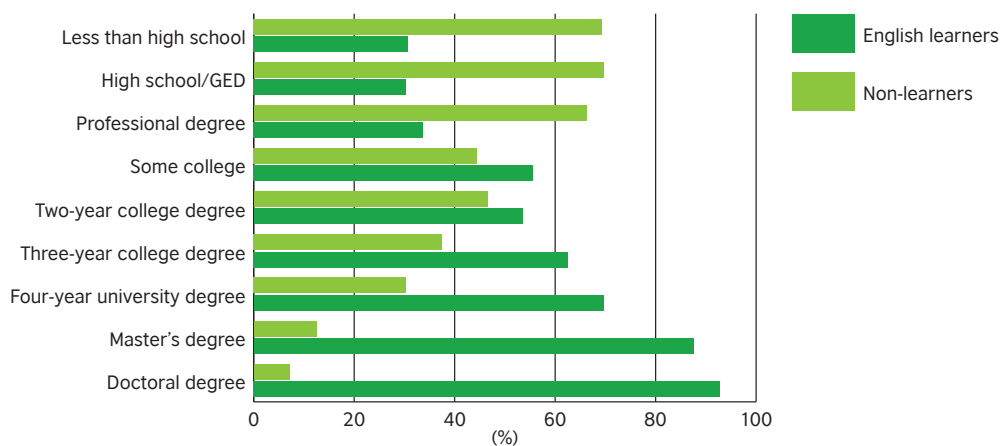
Those industries that had significantly higher proportions of English non-learners included Installation, maintenance, and repair (25% English learners), Food preparation and serving (29%), and Building and grounds cleaning and maintenance (29%). Just 31 per cent of those who are unemployed stated they have learned or are learning English.

There was a relatively even proportion of English learners to non-learners in industries including Personal care and service (55%), Healthcare practitioners and Technical (54%) and Sales and related (44%).

Those industries with the highest percentage of English learners generally require the most academic qualifications. For example, careers in the Sciences, Architecture, Engineering, Law and Management require high levels of education while those in Maintenance and Food preparation and serving, which are more labour-intensive, may not demand such certifications.

Level of education, household income and English language learning

A distinct correlation between level of education and propensity to learn English was displayed in the survey results. Respondents that had undergone fewer years of education had lower proportions of English learners and those with advanced degrees were much more likely to have studied the language.



Source: British Council, Education Intelligence, Latin America Databank 2014

Only those who had less than a high school degree (31%), a high school degree (30%) or a professional degree (34%) had a lower proportion of English learners. There was a higher percentage of English learners who had undergone some college (56%), two-year college (53%), three-year college (63%) and a four-year university degree (70%). Those with a master's degree and a doctoral degree had the highest percentages of English learners, at 88 and 93 per cent respectively.

English language learning is also linked to household income, according to survey results. Whether this is because wealth is correlated with increased levels of education or because those with money have increased access to private schools and institutes, or both, is unknown.

Motivations for studying English

Half of the sample, or 1,001 respondents, indicated that they have learned or are learning English. In order to better understand their relationship with the language, we asked the participants when and why they learned English as well as to self-evaluate their English reading, writing and speaking levels.

When did you study English?

Respondents were asked to indicate when they learned English. As many people use multiple pathways in language learning, participants were allowed to choose more than one answer.

During secondary school	71%
While attending a private English language school	54%
During primary school	49%
During undergraduate study	15%
While studying English for my job	10%
While travelling overseas	7%
While participating in a government-funded programme	4%
While studying or teaching overseas	4%
During postgraduate study	1%

Source: British Council, Education Intelligence, Latin America Databank 2014

The majority of people indicated that they had some experience learning English in secondary school (71%) and over half the respondents stated that they attended a private English language school. Just under half (49%) of the sample stated they learned in primary school. All other options were significantly less popular, with just 15 per cent learning during their undergraduate education and ten per cent studying for their job. Only seven per cent learned while travelling overseas, four per cent while participating in a government-funded programme and four per cent while studying or teaching overseas.

Why did you study English?

Due to the fact that people may have multiple reasons to learn English, respondents were allowed to choose more than one answer when responding to why they decided to study English.

It was mandatory during secondary school	51%
To improve my employment prospects	48%
It was mandatory during primary school	36%
To be able to access more sources of information	21%
To create a wider personal and professional network	20%
To travel	14%
I needed to acquire English skills for university	12%
My parents and/or friends encouraged me to study English	10%
It was necessary for my job	9%
Other	4%
To gain social standing	3%

Source: British Council, Education Intelligence, Latin America Databank 2014

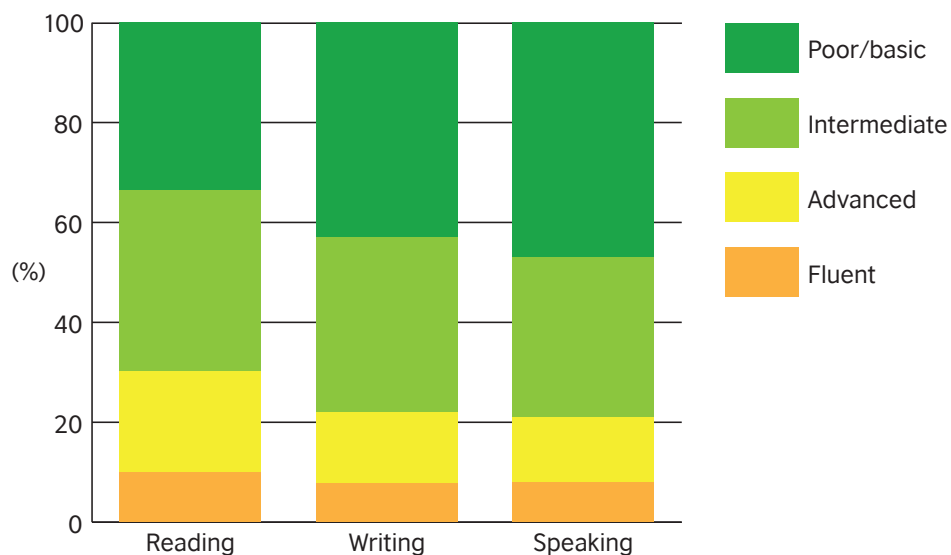
The highest percentage of respondents indicated they learned English because it was mandatory in their secondary school (51%), which partially explains the high percentage of respondents who learned English in secondary school. Survey participants also stated they learned English to improve their employment prospects (48%) and because it was mandatory in primary school (36%).

The least popular reasons for learning English were that it was necessary for the respondent's job (9%), "other" reasons (consisting mostly of an affinity for the language) (4%) and to gain social standing (3%). In Brazil, the ability to speak English is not something in itself that will advance the perception of one's social status.

It is interesting to note that of the 48 per cent of respondents that learned English to improve their employment prospects, just nine per cent stated that it was necessary for their jobs, indicating a preparatory attitude from these respondents.

English proficiency

Survey respondents who have learned or are learning English were asked to self-identify their skills in reading, writing and speaking, choosing between Poor/basic, Intermediate, Advanced and Fluent.



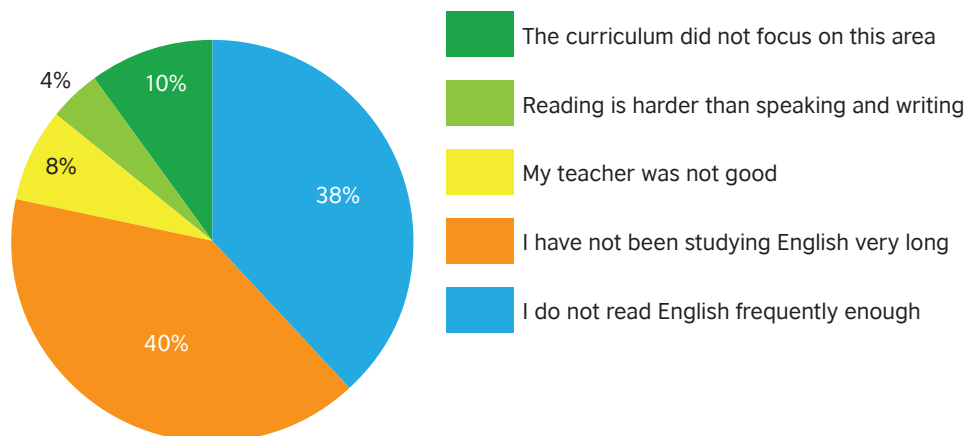
Source: British Council, Education Intelligence, Latin America Databank 2014

With the knowledge that self-evaluation is subjective, the majority of English language learners do not rate their English skills at higher than an Intermediate level. Respondents were most confident in their reading abilities, with 30 per cent stating their reading is at an advanced or fluent level. Participants were less confident in other skills with 22 per cent stating their writing skills are advanced or fluent and 21 per cent saying their speaking skills are advanced or fluent.

Of the 62 respondents that stated they were fluent in reading, writing and speaking, the largest number were students (16%). The next largest groups within this sub-sample were those in Education, Training and Library (11%) and Architecture and Engineering (11%). The highest percentage of this group had gone to a 4-year university (32%) or had a master's degree (27%).

Reading skills in English

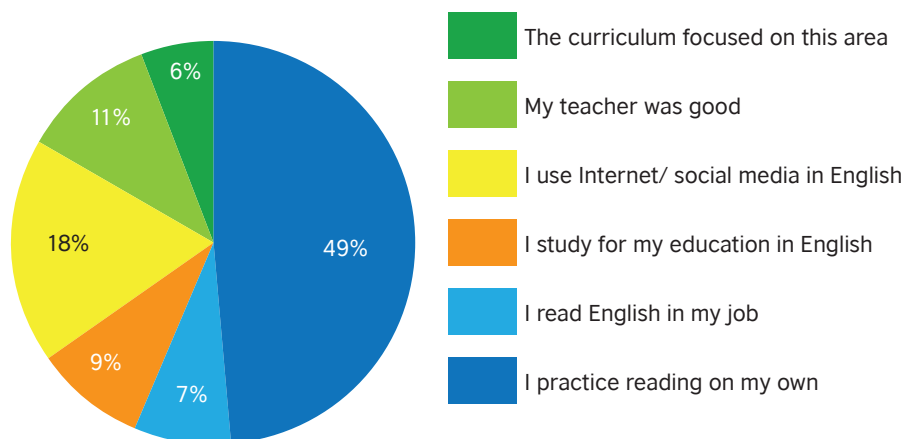
We asked the respondents who self-assessed their reading skills as Poor/basic or Intermediate to explain why their reading skills could use improvement.



Source: British Council, Education Intelligence, Latin America Databank 2014

The largest percentage of respondents stated that their English reading could be improved due to the fact that they had not been studying English very long (40%). A further 38 per cent stated that they do not read English frequently enough. Just 22 per cent stated that it was due to reasons outside of their control, such as the curriculum (10%), the teachers (8%) and the difficulty of reading English (4%).

We asked those at an Advanced or Fluent level of reading why these skills were good.

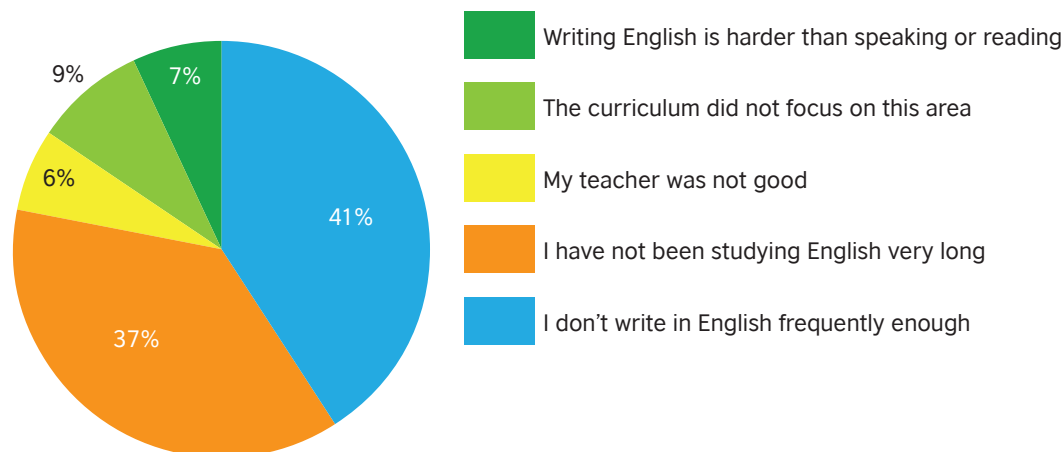


Source: British Council, Education Intelligence, Latin America Databank 2014

Nearly half of respondents stated that they practice reading on their own, hence their proficiency in reading. Eighteen per cent stated that they use the Internet and social media in English and 11 per cent credit their teachers. Nine per cent of respondents stated that they use English in their education and seven per cent in their job. Just six per cent stated their good reading was due to the curriculum.

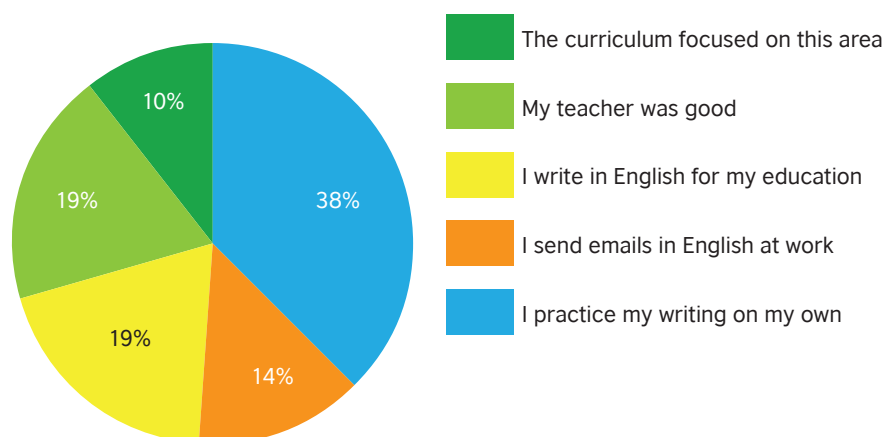
Writing skills in English

We asked the respondents who self-assessed their writing skills as Poor/basic or Intermediate to explain why their writing skills could use improvement.



Source: British Council, Education Intelligence, Latin America Databank 2014

Similar to those who answered the same question about reading skills, the top two responses as to why respondents' writing skills could be improved were that they don't write English frequently enough (41%) and they have not been studying English for very long (37%). Nine per cent stated that the curriculum didn't focus on writing while seven per cent stated that writing is harder than speaking or reading and six per cent stated that the teacher was not good.

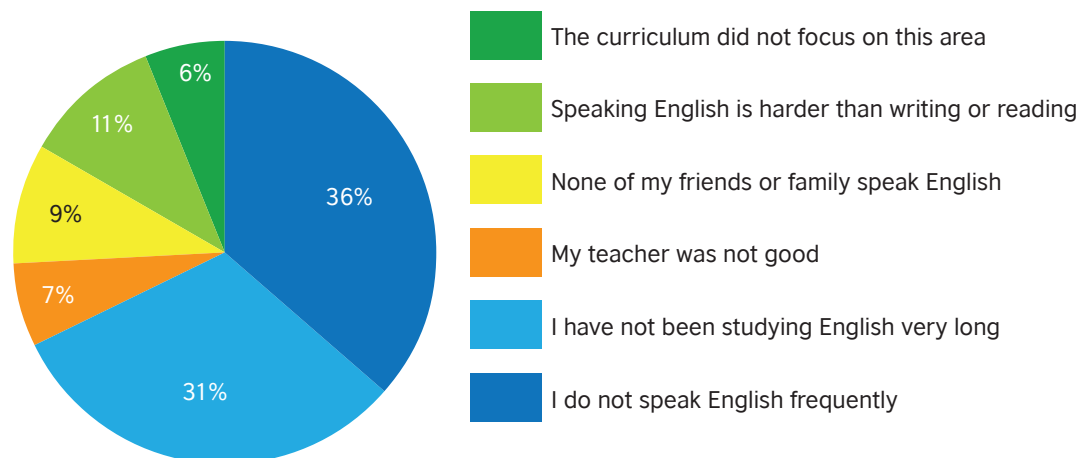


Source: British Council, Education Intelligence, Latin America Databank 2014

Those that write English well do so because they generally practice writing on their own (38%) however credit is also given to teachers (19%) and the use of English in education (19%). Fourteen per cent of people stated they use English at work and 10 per cent stated that the curriculum focused on writing.

Speaking skills in English

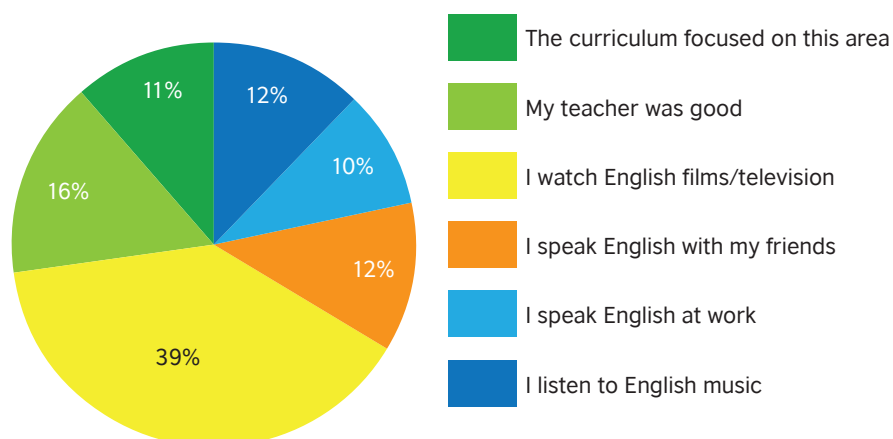
We asked the respondents who self-assessed their speaking skills as Poor/basic or Intermediate to explain why their speaking skills could use improvement.



Source: British Council, Education Intelligence, Latin America Databank 2014

Respondents felt their English speaking skills could use improvement due to the fact that they did not speak English frequently enough (36%) and they had not been studying English for very long (31%). Fewer respondents stated that English speaking is more difficult than reading and writing (11%), none of their family or friends spoke English (9%), the teacher wasn't very good (7%) and the curriculum did not focus on speaking (6%).

It is interesting to note that of the six per cent of people who stated that the curriculum did not focus on speaking, 70 per cent (33 respondents) learned English in secondary school, where the curriculum anecdotally focuses more on grammar than oral communication.



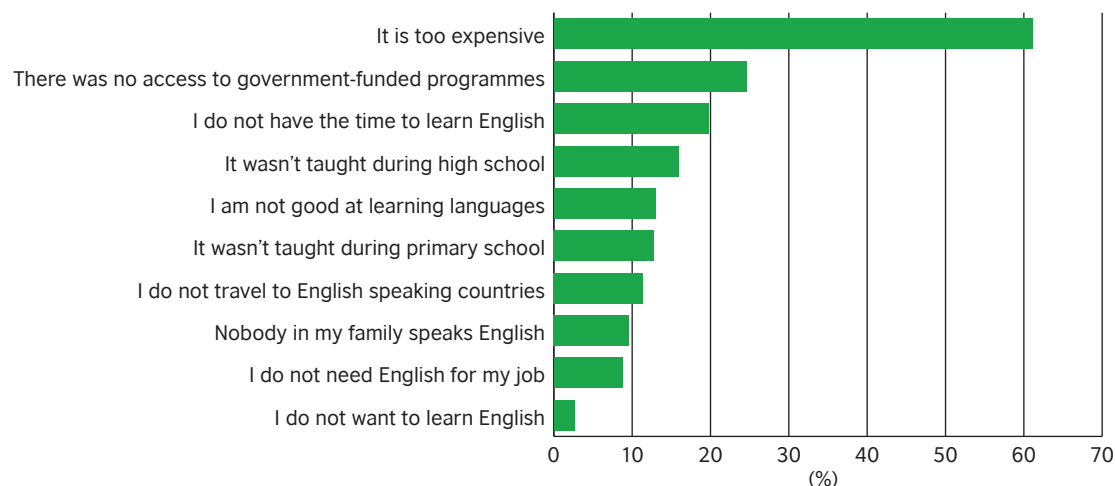
Source: British Council, Education Intelligence, Latin America Databank 2014

Those who rated their speaking skills highly felt their skills were Advanced and Fluent due to watching English language films and television (39%), good teachers (16%), speaking English with friends (12%), listening to English language music (12%), a strong curriculum (11%) and speaking English at work (10%); over 50 per cent of those with strong speaking skills attribute these competencies to popular media.

Barriers to studying English

We asked the 1,001 respondents who stated they have not taken English language training what their motivations were and what may encourage them to learn English in the future.

Why haven't you learned English?



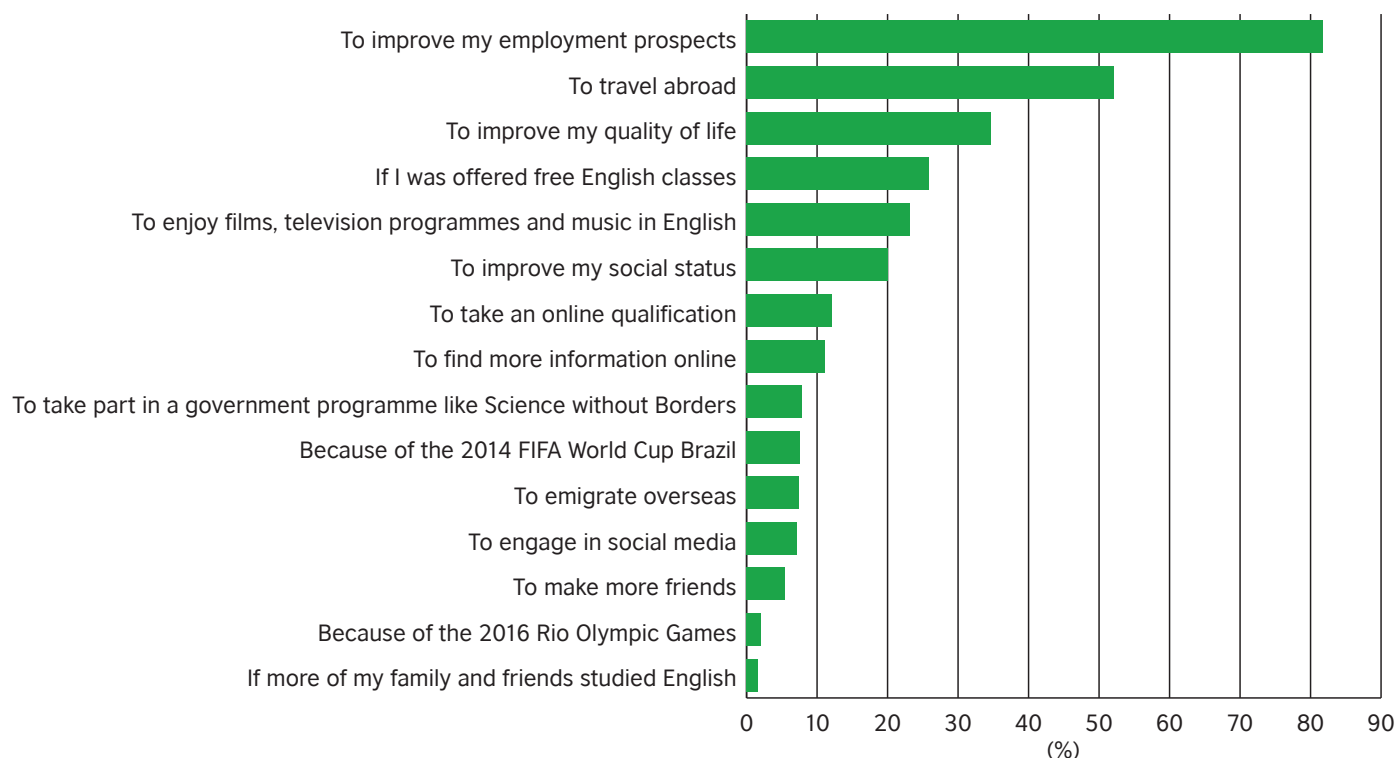
Source: British Council, Education Intelligence, Latin America Databank 2014

As there may be multiple reasons people have not elected to learn English, respondents were allowed to choose more than one answer in response to why. By an overwhelming margin, the majority of respondents stated that learning English was too expensive (61%). The next most popular answer choices were that there was no access to government-funded programmes (25%), there was not enough time to learn English (20%) and that it wasn't taught during high school (16%). Less popular answers included that respondents' family did not speak English (10%) and English was not needed in the respondent's job (9%). Just three per cent of respondents indicated they did not have the desire to learn English.

Of the 612 respondents who stated that the costs of learning English are too expensive, the largest group are those whose highest level of education is high school (42%) followed by some college (20%). The majority of people in this group (85%) make less than R\$5,500 annually. Further, the top industry groups for those that indicated English is too expensive are those that are unemployed (25%), Sales and related (10%) and Office and administrative support (9%). This breakdown reveals that to a population that makes less money and has yet only completed comparatively lower levels of education the cost of English language classes may be prohibitive.

According to a Data Popular survey that surveyed a sample from the C socio-economic class in Brazil, one of the major reasons students give up their courses or don't take English is cost and price, along with a lack of time and the fact that it takes time before a student can see results³⁰.

For what possible reasons would you start to learn English?



Source: British Council, Education Intelligence, Latin America Databank 2014

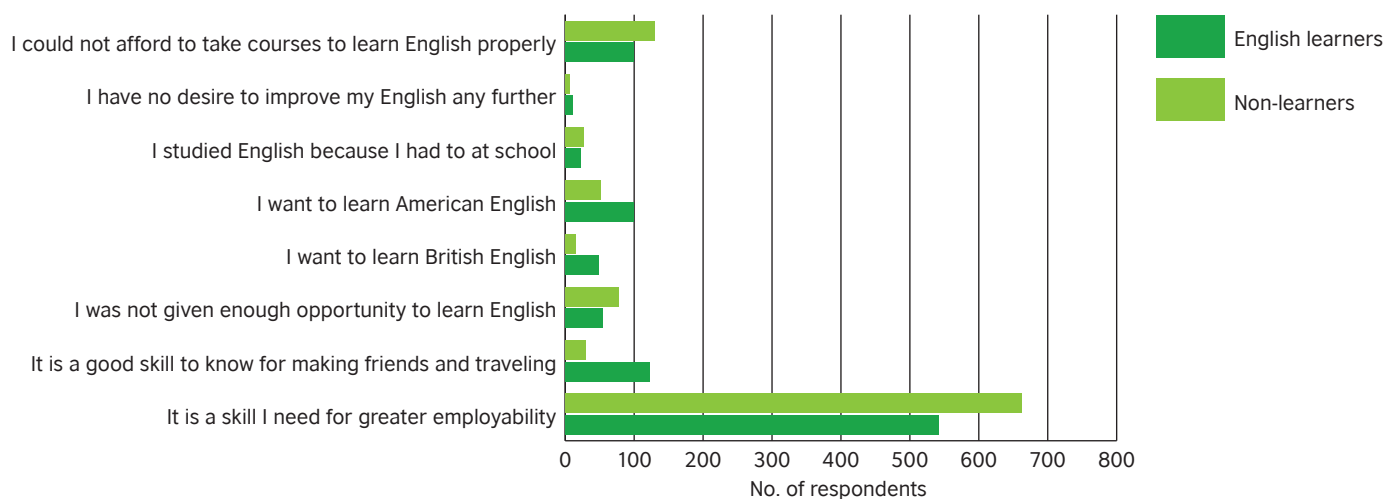
The majority of respondents, when asked what would drive them to learn English, stated that they would do so to improve their employment prospects (82%). Other popular reasons would be to travel abroad (52%), to improve the quality of life (35%) and if the respondent was offered free English classes (26%).

The least popular incentives were to emigrate overseas (7%), to engage in social media (7%), to make more friends (5%), for the 2016 Rio Olympic Games (2%) and if more family and friends studied English (2%).

These answers indicate that Brazilians who are not learning English would do so in order to engage further through better jobs and more travel. While the majority of respondents (61%) indicated costs were the biggest deterrent, just 26 per cent said they would take English classes for free. Thus, while cost may be the biggest barrier, there are stronger drivers, including employability and travel, to learning English.

Views of learning English

All respondents were asked to provide their views on English language learning; each respondent was asked to select the one statement they felt best reflected their sentiments.



Source: British Council, Education Intelligence, Latin America Databank 2014

The highest percentage of English non-learners stated that English is a skill they need for greater employability (66%) while the next most popular view was that they could not afford to take English courses (13%). Less popular views held by this group were that they were not given the opportunity to learn it (8%), they want to learn American English (5%) and it's a good skill for travel and making friends (3%). Interestingly, just below three per cent of this group said they studied English because they had to in school, indicating that they are technically not English non-learners but perhaps identify as such due to reasons that may include a low quality of teaching and learning, few class hours and poorly administered curricula.

Of English learners, the highest proportion of respondents also stated that English is a skill that is necessary for greater employability (54%), followed by it is a good skill for making friends and travelling (12%).

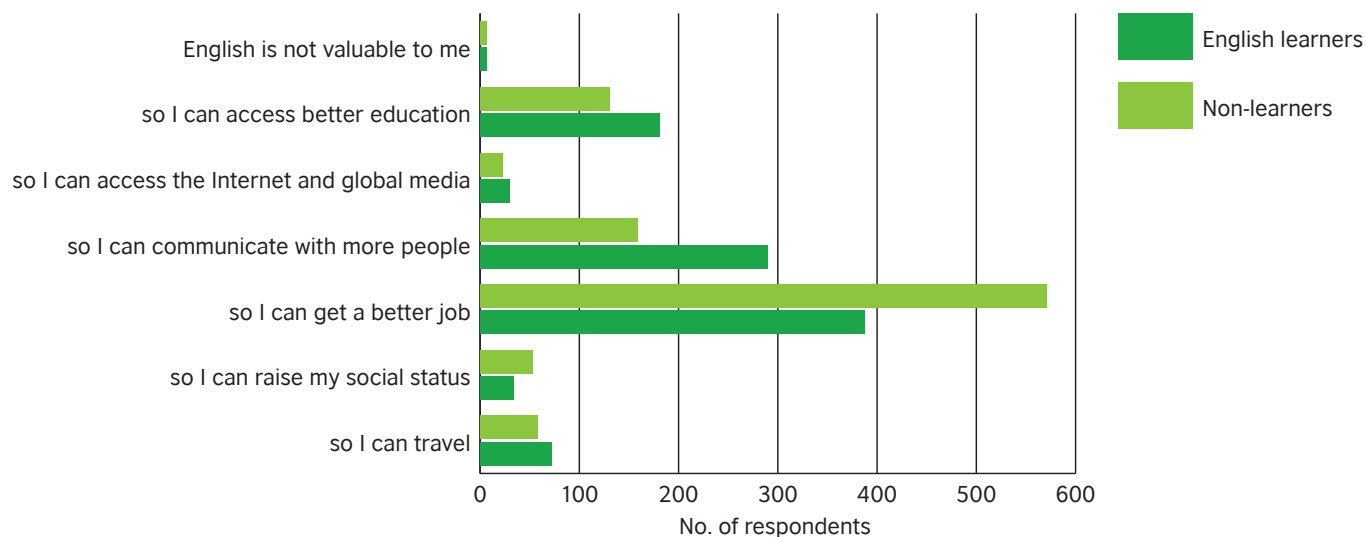
Ten per cent of those who have taken English classes stated they could not afford to take courses to learn English properly, indicating that their learned level of English is quite low. Upon further investigation, we discovered that of this group, 86 per cent made less than R\$5,500 annually and 31 per cent were either unemployed or students. In this group there was mostly a mix of high school graduates (28%), those with some college (25%) and 4-year university graduates (23%). Further, most respondents in this group (84%) learned English in secondary school and 53 per cent learned it in primary school. Lastly, 64 per cent stated that they learned because it was mandatory in secondary school. As such, we can conclude there is a population of people for whom learning English in school is compulsory but who cannot afford to supplement those classes privately; as a result, their English may not be at the level they desire.

The least popular views on English from those who have learned the language are that they have no desire to learn the language further (1%); they studied it because it was mandatory in school (2%); and they wanted to learn British English (5%).

Both English learners and non-learners emphasised the importance, first and foremost, of English in employability. There were also similar percentages of each group that felt that English was not affordable, it was studied because it was mandatory at school and that the opportunities to learn English were not as common as would be preferred. However, the groups differed slightly when it came to English being a skill that helps with travel and making friends.

Value of learning English

All respondents were asked to reflect upon the value they personally place on English language learning; each respondent could only select one view that they most identified with.



Source: British Council, Education Intelligence, Latin America Databank 2014

The highest percentage of English non-learners stated that they thought the main value of English was to get a better job (57%), followed by to communicate with more people (16%) and to access a better education (13%). Less popular answers regarding the value of English involved travel (6%) increased social status (5%) and accessing the Internet and global media (2%). Less than one per cent stated that English is not valuable.

English language learners placed value on English in the same way that non-learners did, albeit in different proportions. The highest percentage stated that English is beneficial in getting a better job (39%), to communicate with more people (29%), and to access better education (18%). They additionally stated that English is useful in travel (7%), to raise social status (3%) and to access the Internet and global media (3%). Less than one per cent stated that English is not a valuable skill to them.

Our data shows that there is a desire to learn English and to improve upon existing English skills, especially for the purpose of employability. Deterrents to English language learning include cost and the quality of provision in schooling.

Employer demand for English

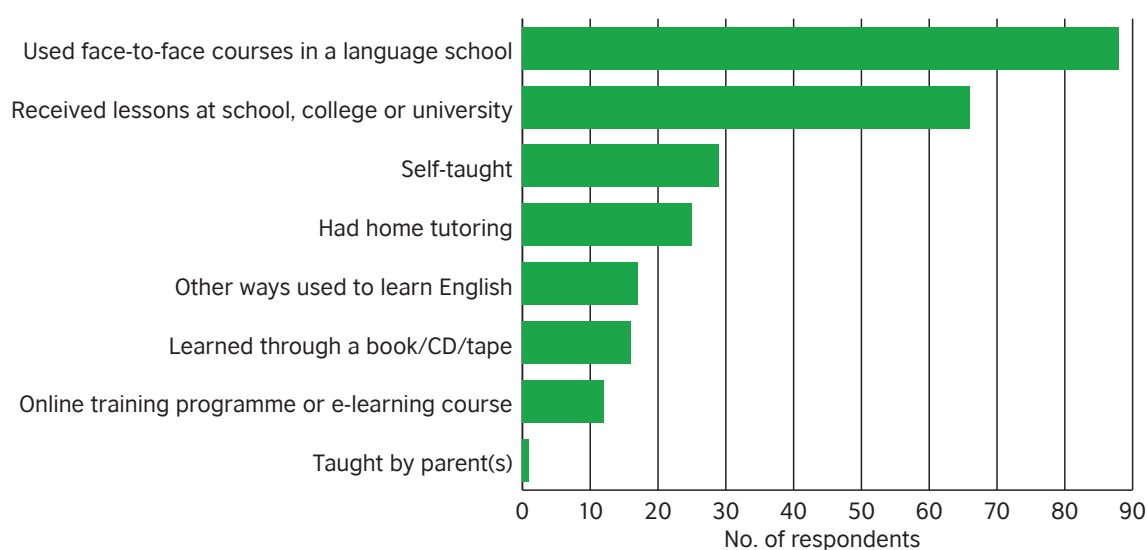
To better understand views from the marketplace, we surveyed 116 employers from different industries in Brazil and asked questions regarding their personal language ability and the relationship between employers, employment and English language acquisition.

Management-level profile

The respondents to the survey were at the management or directorial level in their respective businesses and therefore had already reached the level of employment that many aspire to. Of the 116 respondents, 61 were director-level and 55 were management level. Further, the majority (70%) of respondents are in Owner, Proprietor, CEO, Managing Director or General Management roles.

Basic	20
Proficient	41
Fluent	54

Of the 116 respondents, 115 stated that they speak English at a basic level (17%), a proficient level (36%) or a fluent level (47%).



Source: British Council, Education Intelligence, Latin America Databank 2014

When asked where the management level respondents had learned English, participants were allowed to select more than one answer. The majority of respondents stated that they had learned English using face-to-face courses in a private language school (77%) or had received lessons in school, college or university (57%). Less popular answers included that they had been self-taught (25%) or had home tutoring (22%). A small percentage had used media or e-learning to learn and just one respondent was taught by his or her parent(s).

The one respondent who was unable to speak English stated that he or she would like to learn to speak English.

Employer analysis

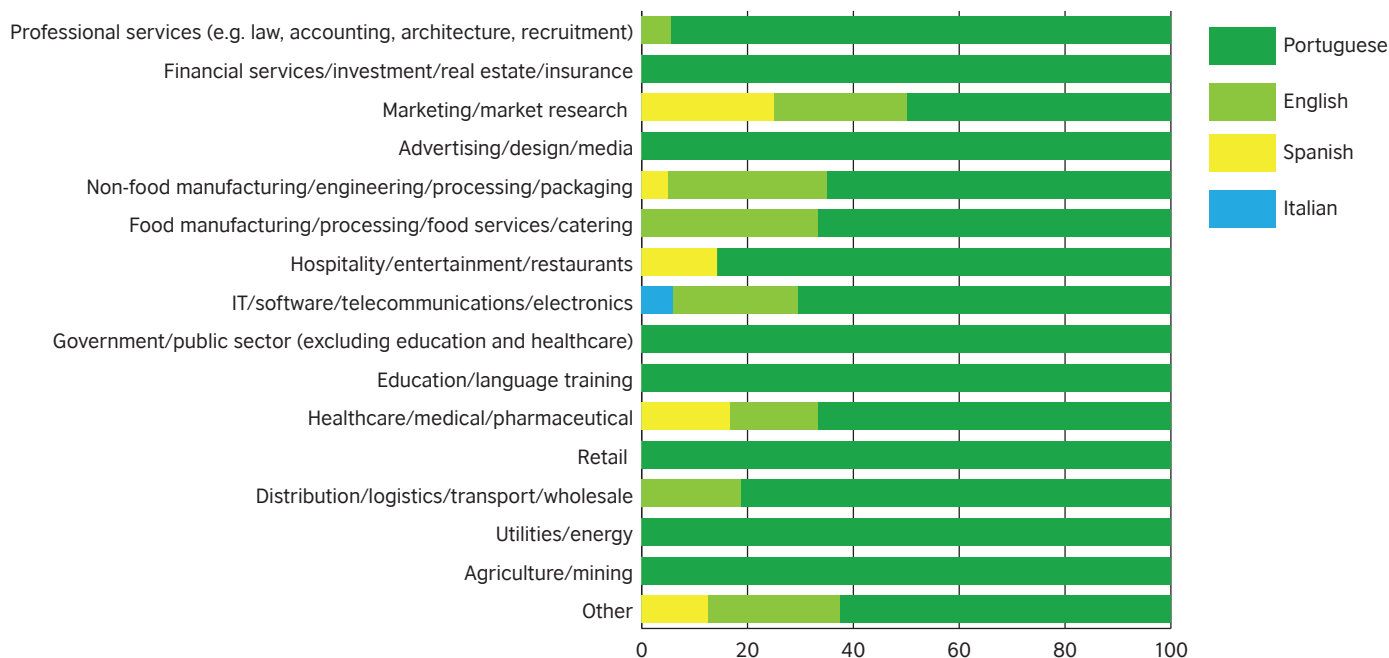
The businesses represented by the survey respondents were located mostly in Sao Paulo (35%), Rio de Janeiro (14%), Curitiba (6%), Brasilia (3%) and Belo Horizonte (3%), though there was representation from many metropolitan cities nationwide. Companies varied in size, with 45 per cent employing up to 49 employees and 21 per cent employing over 1,000 workers.

Sector	No. of respondents
Professional services (e.g. law, accounting, architecture, recruitment)	17
Non-food manufacturing, engineering, processing and packaging	16
IT, software, telecommunications and electronics	16
Distribution, logistics, transport and wholesale	13
Other	13
Financial services, investment, real estate and insurance	8
Hospitality, entertainment and restaurants	6
Retail	6
Advertising, design and media	4
Healthcare, medical and pharmaceutical	4
Education and language training	3
Agriculture and mining	3
Marketing and market research	2
Food manufacturing, processing, food services and catering	2
Utilities and energy	2
Government and public sector (excluding education and healthcare)	1

Source: British Council, Education Intelligence, Latin America Databank 2014

The respondents represented firms in Professional services (15%), Non-food manufacturing, engineering, processing and packaging (14%), IT, software, telecommunications and electronics (14%) and Distribution, logistics, transport and wholesale (11%). Eleven per cent also represented industries not listed, including Consulting. There was less representation from numerous other sectors.

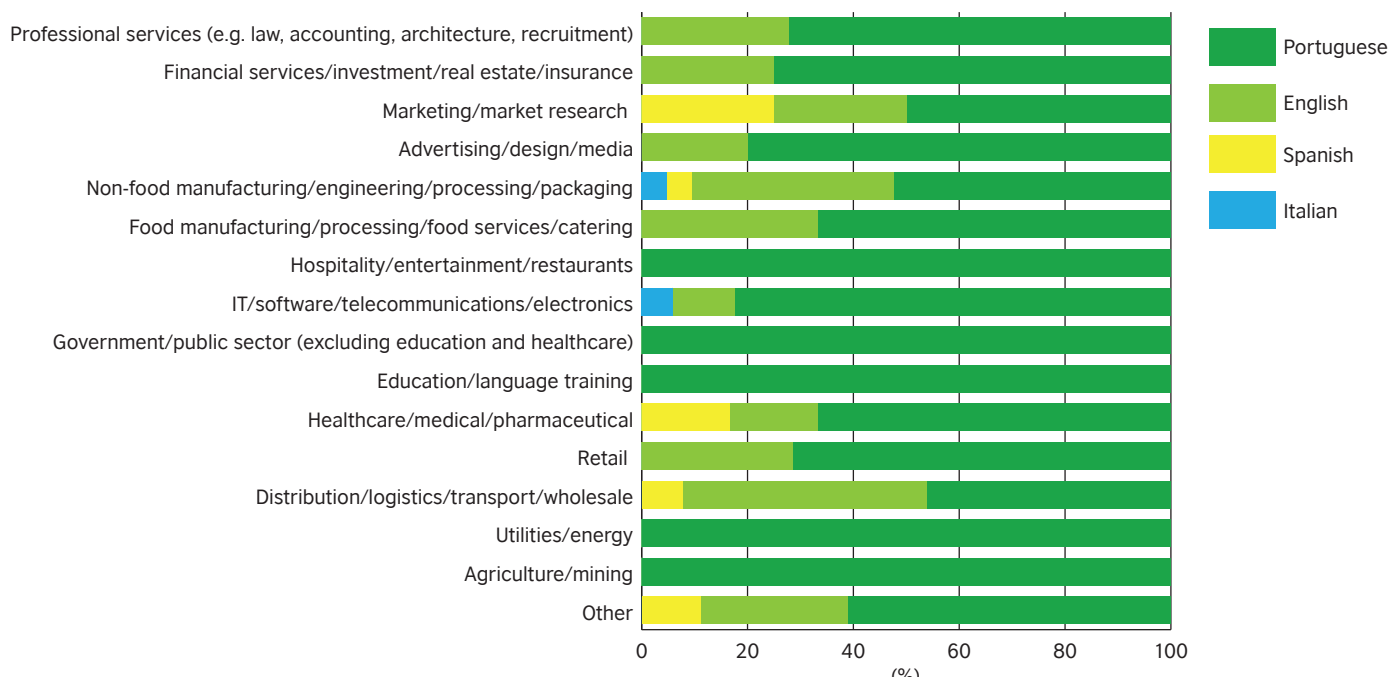
We asked respondents to identify what languages were used internally at their companies.



Source: British Council, Education Intelligence, Latin America Databank 2014

Respondents indicated that Portuguese was the most used language of communication internally, with English, Spanish and Italian also being used. The industries in which English as an internal language of communication was most often used, as compared to other languages, were Food manufacturing, processing, food services and catering, Non-food manufacturing, engineering, processing and packaging, Other (including Consulting), and Marketing and market research.

We asked respondents to identify what languages were used externally with their clients.



Source: British Council, Education Intelligence, Latin America Databank 2014

According to survey results, industries which use English the most, proportionally to Portuguese, externally include Distribution, logistics, transport and wholesale, Non-food manufacturing, engineering, processing and packaging, Food manufacturing, processing, food services and catering, Retail, Professional services (such as law, accounting, architecture,

and recruitment), Other (including Consulting), Financial services, investment, real estate and insurance and Marketing and market research.

No representatives of industries including Hospitality, entertainment and restaurants, Government and public sector (excluding education & healthcare), Education and language training, Agriculture and mining and Utilities and energy indicated that English was used externally with clients.

We asked the employers if their companies offered training and development courses in English language and 31 per cent of respondents indicated that their businesses did offer such a service. Employers were asked in what way they provided such support.

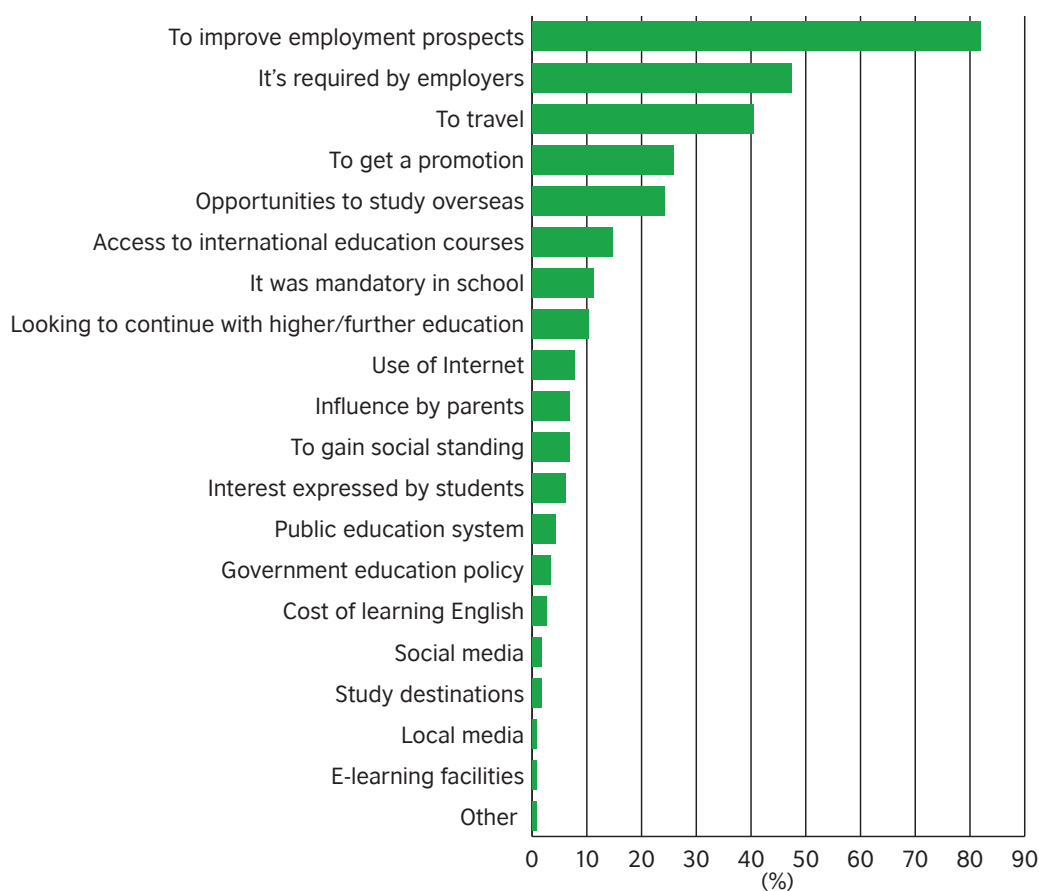
Partnership with an external private company	53%
Funding provision for English tutoring	47%
Internal provision	22%
Online learning	8%
In-house English classes	6%

Source: British Council, Education Intelligence, Latin America Databank 2014

The majority of training takes place through a partnership with an external private company, usually an English school that will send a teacher to the company a few times a week or hold special or discounted classes for employees on certain nights. Other forms of professional language support include funding for English tutoring, internal language provision, support for online learning and in-house English classes.

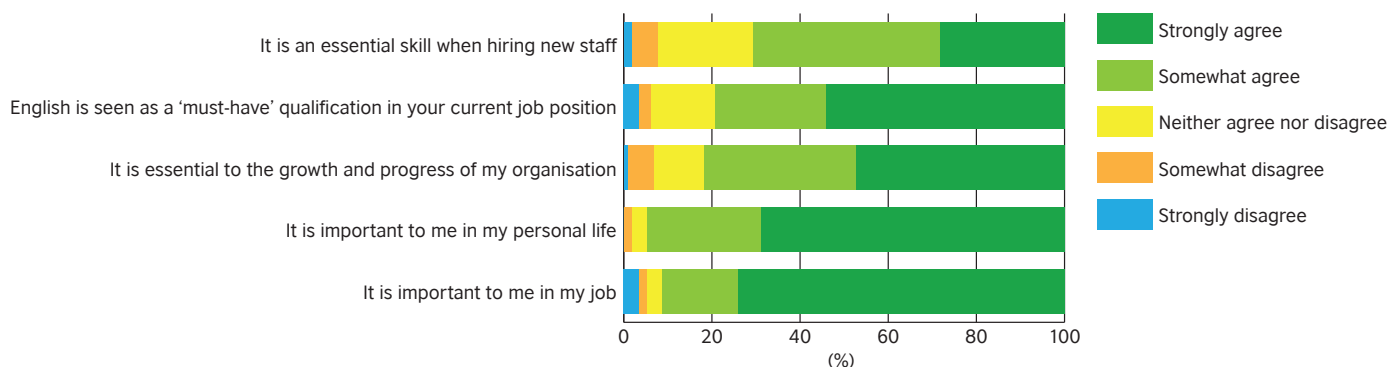
Employer views on English

As part of the survey, we asked respondents' personal views on the facts that most affect English language learning in Brazil.



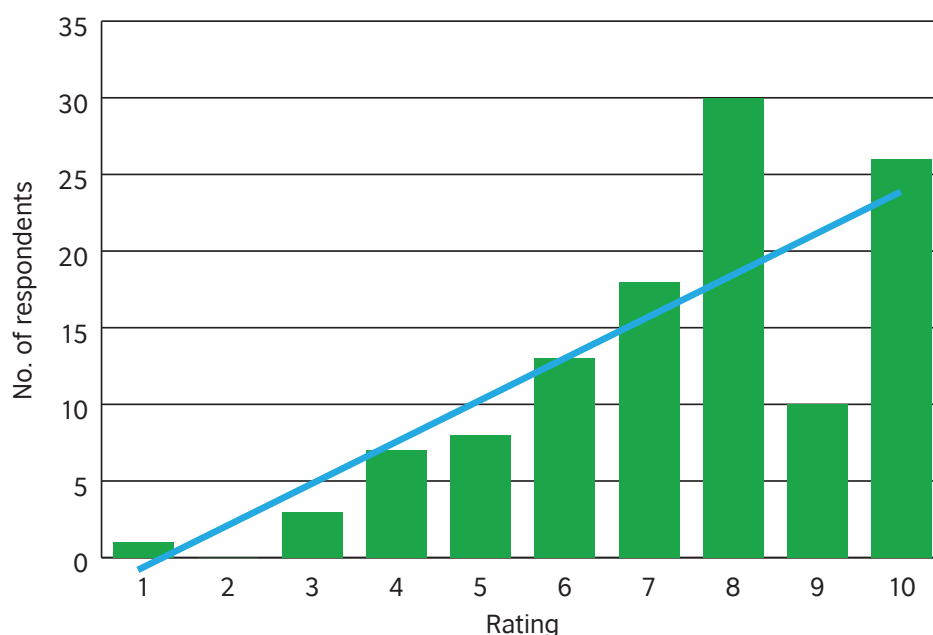
Source: British Council, Education Intelligence, Latin America Databank 2014

Managers and directors were asked what they thought the top drivers for English language acquisition were in Brazil; respondents were allowed to choose up three answers. The highest percentage of respondents indicated that people learn English to improve employment prospects (82%), followed by because it is required from employers (47%) and to travel (41%). Other popular answers were to get a promotion (26%), to study overseas (24%), to gain access to international courses (15%) and because it was compulsory in school (11%). All other factors accounted for ten per cent or less respondent answers. As such, it can be concluded that according to employers, the drivers most likely to incentivise people to learn English have to do with increasing employability and international travel and study.



Source: British Council, Education Intelligence, Latin America Databank 2014

We asked respondents to respond to a series of statements regarding English language as it relates to the individual and the business. While most of the survey participants responded positively to most of the questions, there was slight variation in the degree of agreement. Respondents most agreed with the fact that English is important to the respondent in his or her own personal life (95%) and in his or her job (91%). They also agreed, but to a lesser degree, that English is essential to the growth of the organisation (82%), and that it was a must-have qualification in their current (high-level) role (79%). Seventy-one per cent of respondents stated that English is an essential skill when hiring new staff; twenty-two per cent of respondents neither agreed nor disagreed with this statement.



Source: British Council, Education Intelligence, Latin America Databank 2014

We asked respondents to evaluate how essential the English language is, from a scale of one (not important) to 10 (essential). The highest percentage of respondents indicated that English language proficiency would be very important (an eight) and the second highest declared it essential. In addition, a strong and clear trend of English being an important and valued skill by managers and directors emerges from the data. Professionals in the financial services industry were most likely to see English as essential. Just one respondent stated that it is not important for workers to acquire English.



Source: British Council, Education Intelligence, Latin America Databank 2014

We asked employers to identify why they thought English was or was not essential and the above word cloud represents the answers received, with the size of the word signifying the frequency of it in respondents' answers. The relevant words that were most prominent were English, language, customers, international, company, essential, foreign, suppliers and communication. Upon further investigation of the answers, we determined that there was a largely universal concern that most customers lived outside of Brazil and spoke English and as such, English was a necessary skill in order to continue the expansion of business.

Factors shaping demand for English learning in Brazil

Brazil has a long and involved linguistic history that has led to the current situation wherein guidelines for foreign language learning, including English, are designed for interpretation and implementation by teachers and administrators closest to the local education delivery context on the ground. As such, English language provision and uptake within Brazil is inconsistent and complex. Our research has shown there are a number of new drivers and deterrents for English language learning in Brazil; through this data collection and analysis we have been able to explore a number of factors that influence levels of English learning in Brazil and identify new ways in which these factors are impacting the English learning environment.

Brazil's global engagement

Brazil has long taken a sovereign, non-interventionist approach to foreign policy, wherein it prioritises partnerships and interdependence within the region as well as with the Portuguese-speaking world. As such, collaborations in various spheres with the global South and within Latin American economic and political groups are characteristic, though possibly less beneficial to Brazil, according to some sources³¹. The Ministry of External Relations governs not only international relations, but trade policy; thus, foreign investment into Brazil is to a degree contained in foreign policy.

This business tie with foreign policy could be why Brazil, with more high-profile opportunities for multinational corporate interest than many Latin American countries, actually attracts lower-than-regional-average foreign direct investment as percentage of GDP. This is partly due to government restrictions which state that external investment should be in Brazil's long-term best interest and made in key growth areas such as agriculture, labour-intensive industries, information technology and manufacturing of certain products. Further, specific restrictions exist in fields including aviation and publishing as well as within areas linked to defence³².

While foreign direct investment is still significantly higher than 2009's US\$25.9 billion during the global recession, the trend is lower, with 2013 FDI at US\$64 billion compared with the 2011 high of US\$66.6 billion³³. Brazilian protectiveness of its political position and economy, which some see as detrimental to the country's commercial growth, extends to education policy and cultural heritage, with the umbrella term used to describe this sentiment popularly known as "Brazilianism."

'Brazilianism'

Portuguese is synonymous with Brazilian sovereignty due to its unifying and distinctive role as the national language of the largest Latin American country. The nation has a long history of linguistic dominance, which has led to the unique type of Portuguese spoken in Brazil as well as careful consideration surrounding foreign language policies. Portuguese has become a symbol of Brazilian nationalism and pride, with around two per cent of the population presenting as bilingual, according to one source³⁴.

The sense of individuality and nationalism that has been borne from the diversity of ethnicities and traditions in Brazil is extremely strong; people take great pride in the uniqueness of their culture. The idea of 'Brazilianism,' which examines Brazil's powerful history and how its distinct communities have come together to form a cohesive and unified nation, is now being offered at the university level as a subject of study. Cultivated partially by decades of unfavourable sentiment directed at different times towards the Portuguese, Spanish, British and Americans, the Brazilian identity is also defined to a certain extent by its anti-imperialist views.

³¹ "Continental Regionalism: Brazil's prominent role in the Americas," CEPS Working Documents, February 2013. Retrieved from: http://aei.pitt.edu/40231/1/WD_No_374_Brazil's_Continental_Regionalism.pdf

³² PWC, "Doing Business and Investing in Brazil," 2013. Retrieved from: <http://download.pwc.com/ie/pubs/2013-doing-business-in-brazil.pdf>

³³ Deloitte, "Investment History in Brazil," 2014. Retrieved from: <http://www.deloitte.dbrazil.com.br/show.aspx?idCanal=Tap1ogfxsUipt3uYP217JA>

³⁴ Blankfeld, K., "Can teaching Brazilians new languages turn 'Wizard' into a billionaire?," *Forbes Magazine*, 5 April 2011, <http://www.forbes.com/sites/kerenblankfeld/2011/04/05/can-teaching-brazilians-new-languages-turn-wizard-into-a-billionaire/>.

The English language specifically has long been denied special consideration in Brazilian politics, policy and education due in part to the association between the language and the notion of cultural imperialism; generations of Brazilians have prospered without knowledge of the language and many in the country associate English with the United States and its role in the military regime from the 1960s to the 1980s. Due to this and the diversity of Brazilian history and the Brazilian people, it has been important not to refer to English as a second language - of which many exist in the form of indigenous languages – but as one of many foreign languages³⁵. Examples of the democratisation of language is exemplified by the fact that that seven foreign languages are offered to middle schoolers in Sao Paulo as well as the historical role of Spanish and French as the foreign languages of choice.

Our research has shown that the popular sentiment towards English is slowly changing, especially with the new generation of citizens that has no experience with the former dictatorship and an awareness of the increasingly globalised knowledge economy, of which Brazil is an important part.

Government policy for English language learning

The 1988 Brazilian constitution stipulates that education is a right that belongs to everyone, with a view to the full development of the individual for the exercise of citizenship and the preparation for work. The National Education Guidelines and Framework of Law, amended to the constitution in 1996 also emphasised the purpose of education as the strengthening of individual rights and preparing individuals and society for the benefit of common welfare. This law also gave significant autonomy to schools and universities making each responsible for implementing pedagogical proposals, and managing their own personnel, materials and financial resources.

In 2010 the approval of the National Curriculum Parameters (PNC) for early childhood, primary, secondary, indigenous, adult education and teacher training, the drafting of the guidelines documents and the creation of the Common National Base detailed the recommended content of basic education in Brazil. However the Common National Base focuses on students attaining proficiency of Portuguese language and mathematics and subsequent amendments stipulated knowledge of the diverse history and culture that characterise the formation of the Brazilian population.

As noted in an earlier section, foreign language learning is outlined as an area of study in the National Education Guidelines and Framework of Law within the field of Languages, Codes and Related Technologies. However the nature of the three recognised simultaneous education systems at federal, state and municipal levels and the nature of the Common National Base as only a recommendation, interpreted and implemented to account for regional and local characteristics of society, culture and economic life of the target group, combine to shift focus away from learning foreign languages across public schools in Brazil.

In some regions of Brazil general literacy and numeracy is the focus of teaching in basic education, which comprises only half a day of classroom teaching daily. This means there is limited time and resources for foreign or English language lessons. When languages are taught, English is often not the only foreign language offered to students. As is evident in the case studies highlighted in Sao Paulo and Rio de Janeiro, where languages programmes are being piloted, English is both popular and beginning to be given priority.

The creation and structure of Brazilian government education policy and within that, English language learning, reflects the complex make-up of Brazilian society, the context of the pre-1988 constitutional reform from the previous dictatorship and the need to focus limited government funding on reaching the 2015 Millennium Development Goals. By necessity, the creation of a cohesive society that will contribute to Brazil's growth as a global economy is the focus of Brazilian governments, so that in most cases English learning remains a luxury in public schools. The monopoly currently held by private language schools is therefore unlikely to be challenged.

The primary purpose of the Science without Borders programme launched by the federal government in 2011 was to promote the expansion of science, technology and innovation in Brazil by means of international exchange and mobility. A significant unintended consequence of this programme has been the creation of the Languages without Borders initiative and the attention that is now being given to language learning by the federal government at tertiary education level. A number of stakeholders that took part in this study described many of the Brazilian government language learning initiatives as gap filling in response to unmet demand. The complex decentralised nature of the slow moving machine of government has meant that steps to implement national policy that may imply non-constitutional emphasis on one foreign language-English- have not been taken. This is an excellent example of the democratisation of public education language provision in Brazil.

³⁵ De Almeida, R.L.T. "The teaching of English as a foreign language in the context of Brazilian regular schools: a retrospective and prospective view of policies and practices," *RBLA, Belo Horizonte* 12.2 (2012). Retrieved from: <http://www.scielo.br/pdf/rbla/v12n2/v12n2a06.pdf>

Level of education and assessment

Data from the survey administered to the Brazilian public showed a clear positive relationship between levels of education and English language proficiency. Of those with education levels up to a high school degree, just 30 to 31 per cent had learned English. However, over 50 per cent of those who had enrolled in college and 70 per cent of those with a university degree had studied English. Further, 88 per cent of those with a master's degree and 93 per cent of those with a doctoral degree had experience with the language. The majority of positive respondents had learned in secondary school because it was mandatory in school and 18 per cent of learners said they viewed English as a vehicle for access to better education.

While our data showed that English provision in private and public schools does correlate to English language learning, it does not necessarily precipitate it. The majority of positive survey respondents (71%) indicated they learnt English during secondary school, however due to language provision in public schools not being sufficient for students to truly master the language, English is mostly learned at external English language schools (54%). Upon speaking with Brazilian young people and adults, we found that English provision in basic and secondary education is generally viewed as a deterrent to acquisition of the language for a number of reasons, including a lack of assessment, time applied to English learning, and teacher training.

There is no standard curriculum or benchmark for English and therefore provision varies. While other nations have adopted various national and international frameworks, such as the Common European Framework, to measure language levels, stakeholders in Brazil are devising and employing uncoordinated structures to assess English levels. Schools rely heavily on teachers and administrators for face-to-face assessment, while English language training schools often create their own curricula and exams. Without evaluation from the education sector, employers and recruiters rely on staff to measure English levels of potential employees based on a short interview exchange. Municipal and state ministries are working towards a cohesive assessment scheme, but to date there are no fixed mechanisms in place.

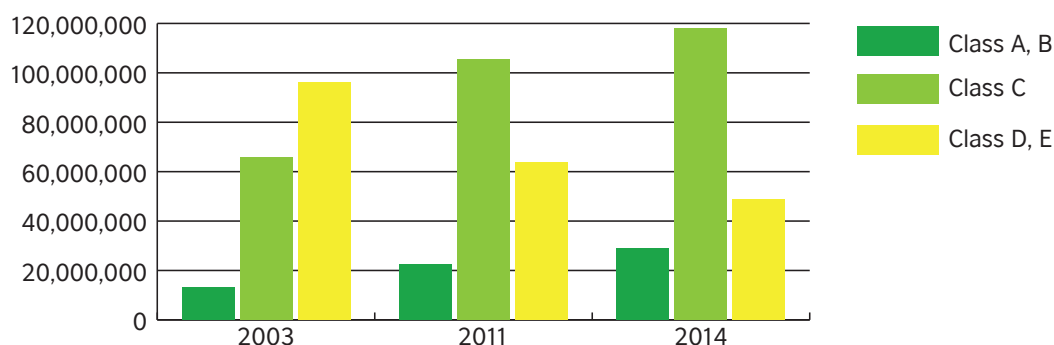
The presence of benchmarks in the Brazilian English learning landscape are not only important for appraising the system and its parts and tracking the progress of the students, but also for allowing the students themselves to understand their levels of English as compared to other learners nationally and internationally. Students we spoke to remarked that taking international English exams allowed them to compare themselves to a larger sample and therefore be more confident in their own English language skills.

Due to the half-day system and importance of other subjects, very little time is spent on English learning. The time that is devoted to the language focuses more on grammar and vocabulary and less on oral communication. This is partially because many of the English teachers themselves do not have a firm grasp on English or the practical pedagogies associated with teaching the language. There are various professional development programmes run at different government levels, including staff exchanges as the 'multiplier' method of training, but overall the support for English language teachers is nominal at best.

As students progress, however, to college and undergraduate as well as postgraduate degrees, education does precipitate English learning due to the availability of academic resources in the language. Graduates with higher levels of education may aim for management level positions, which by and large require proficiency in English. The current structure of English teaching within the school system can impart negative impressions to students on both the value and process of language learning; however those who progress into higher education may have the opportunity to understand the importance of learning the language framed by their own academic ambition.

Income and the emergence of the C class

The correlation between household income and English language learning is undeniable in Brazil as shown by our data collection and, unofficially, English language abilities are the best indicators of socio-economic status. The socio-economic distribution in Brazil has shifted profoundly in the last decade, during which the nation's richer classes (A and B) grew nominally, the poorest classes (D and E) shrunk, and the middle C class grew exponentially.



Source: Center of social policies - CPS/FGV based on PNAD/IBGE microdata

From 2003 to 2014, almost 16 million joined the A and B classes and over 52 million people rose to the C class, in part due to improved social programmes and an increased minimum wage^{36,37}. During this period the population of the D and E classes fell by almost 50 per cent³⁸.

The income levels associated with the Brazilian socio-economic framework are as follows:

Income class	Monthly household income (BRL, 2011)
A	>9745
B	7475-9745
C	1734-7475
D	1085-1734
E	<1085

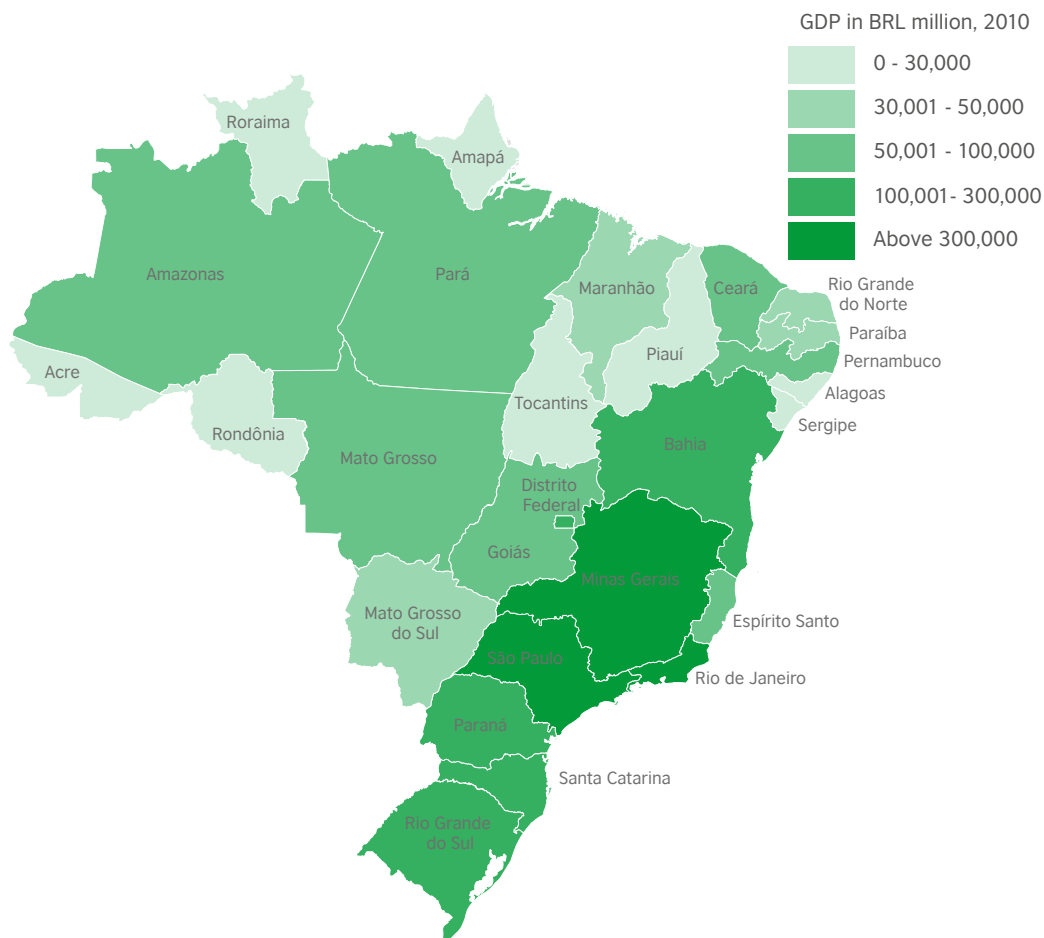
Source: OECD

³⁶ Arnold, J.M. and Joao Jalles. "Dividing the Pie in Brazil: Income Distribution, Social Policies and the New Middle Class." OECD, 9 January 2014. Retrieved from: [http://www.oecd.org/officialdocuments/publicdisplaydocumentpdf/?cote=ECO/WKP\(2014\)1&docLanguage=En](http://www.oecd.org/officialdocuments/publicdisplaydocumentpdf/?cote=ECO/WKP(2014)1&docLanguage=En)

³⁷ Euromonitor, 2014

³⁸ Neri, M., "Back to the Country of the Future: Forecasts, European Crisis and the New Middle Class in Brazil," Centro de Políticas Sociais, 2012. Retrieved from: http://www.cps.fgv.br/cps/bd/ncm2014/NCM2014_ENG_SUMARIO_final.pdf

Gross domestic product varies vastly by state in Brazil.

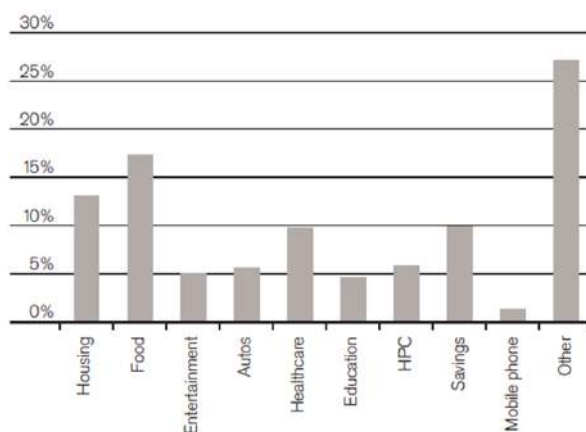


Source: CPS/FGV based on PNAD/IBGE microdata

While the redistribution of wealth is nationwide, the majority of those in the A, B and C classes are centred in south and southeast Brazil, especially in the major cities and their surrounding areas; our data also displayed these areas, along with the tourism hubs on the east coast, as having higher English levels. Undoubtedly, the redistribution of wealth is affecting education and English attainment in Brazil. Our data shows a direct correlation between income and English.

The burgeoning middle class in Brazil is perceived to hold slightly more modest aspirations than its counterparts in other countries. In Brazil, the C class priorities consist of providing a secure home and sustenance for close family, perhaps with the emphasis on goods such as televisions, refrigerators or microwaves to enhance quality of life. However, access to private education and transportation, for example, can still be difficult for this group³⁹.

Monthly spending by category (%)



Source: Credit Suisse Emerging Consumer Survey⁴⁰

The next step for the Brazilian middle class in terms of investment and spending is education. Currently, English is still considered a luxury good: one that affords status and possibly, in the future, employment opportunities. According to a 2014 survey carried out by Data Popular those in the C class aspire to have better jobs and travel more and as such, investment in education as well as English is growing. In the past, education has been one of the slowest growing sectors in consumer spending but this is forecast to change drastically to 2020, largely due to investment from the growing C class⁴¹.

For the D and E classes, English is an often unattainable extravagance. Our data showed that cost is one of the largest barriers to English language learning and 85 per cent of those who attributed that as the reason for not learning English made less than R\$458 monthly, putting them in the E class according to OECD categorisations. Many in the poorer classes do not see the need for English in their lives as they do not have jobs that call for English proficiency. As a result, these groups do not tend to learn English unless they come upon a government or externally subsidised programme. One last factor that drives the lack of English proficiency in poorer classes is the undercurrent of classism, which imparts the idea that education may not be a basic right for all Brazilians; looking back in history, upon independence Brazil's former slave communities transitioned to become the poorer classes within Brazilian society. The Constitutional stipulation that education should be available for all was not then believed to be a priority. An elitist mind-set is described as leading to the notion today that children from lower socio-economic classes may not have the aptitude for school and language learning⁴².

The attitudes towards education and English are vastly different for the A and B classes. Those belonging to the wealthier classes see English as a necessary extracurricular expense to ensure widened opportunities for the future. The children of these classes, who often attend private schools, tend to know they will speak English from a young age and are put into well-organised English language schools alongside their basic education. It is the children in these socio-economic groups that can aspire to travel and study abroad and then return to Brazil to attain high level management positions.

³⁹ Prado, P., "Special Report: Why Brazil's new middle class is seething," Reuters, 3 July 2013. Retrieved from: <http://www.reuters.com/article/2013/07/03/us-brazil-middle-specialreport-idUSBRE9620DT20130703>

⁴⁰ Credit Suisse Emerging Consumer Survey. Retrieved from https://www.credit-suisse.com/news/doc/media_releases/consumer_survey_0701_small.pdf

⁴¹ Euromonitor, 2014

⁴² Eulich, W., "Double shifts and lousy hours: Are Brazil's schools holding it back?," The Christian Science Monitor, 8 June 2014. Retrieved from: <http://www.csmonitor.com/World/Americas/2014/0608/Double-shifts-and-lousy-hours-Are-Brazil-s-schools-holding-it-back>

English for employability

Inadequacies in English language levels in Brazil are perceived to be adversely affecting international investment. The Global English Corporation Business English Index stated that Brazilian businesses and people are at a distinct “disadvantage” due to their lack of fluency in English⁴³. This is corroborated by the Economist Intelligence Unit which states that Brazilian adults do struggle in the global business arena due to their lack of English skills⁴⁴. Further, nearly 75% of surveyed Brazilian businesspeople stated that their company had suffered financially due to failed international transactions.

Increased employability was by far the most popular incentive for our survey respondents that had not learnt English to do so, with 82 per cent stating that they would learn the language to improve job prospects. Forty eight per cent of those that had learnt English stated that one of the reasons they learned English was to increase their employability. However, of this group only nine per cent stated that English was necessary in their current role, perhaps indicating a preparatory attitude and appreciation for the growing value of English as a skill.

While English is formally required for up to 80 per cent of jobs, according to an executive recruiter in Sao Paulo, a recent Catho survey indicated that only 11 per cent of Brazilian job candidates could communicate proficiently in English and only 3.4 per cent of candidates were fluent in the language. An earlier survey from 2009 showed that roughly a quarter of Brazilian professionals are proficient in English and only eight per cent are fluent⁴⁵. It is commonly accepted that English speaking candidates have a distinct advantage as language proficiency is often used by employers as a deciding factor between candidates. In Sao Paulo, English speaking jobs generally pay about 30 per cent more than other jobs and, according to one source, the language is viewed as “the passport to join the party of a good salary.”

However, in practical terms speaking English is perhaps only an absolute necessity for higher-ranking positions. When the Brazilian economy opened up in the 1990s, most high-level staff were expatriates but this is no longer the case. In management and directorial level positions, English is necessary but those at lower levels may not have a chance to use the language, even if they are proficient. Specific job functions, such as marketing, sales, finance and human resources, call for English proficiency whereas others, including facilities and procurement, generally do not.

Just as English is only necessary in certain job functions, it is still only fundamental in specific industries. As one of the BRICs, Brazil has attracted foreign attention and while the country is open to foreign direct investment, which is lower than the regional average as a per cent of GDP, there are still industries that remain largely closed, including insurance, aviation and media; as a result, English is not as necessary in these sectors as others⁴⁶. Other sectors that are opening up but which remain mostly local include retail, engineering, construction, real estate and property. As these industries have not fully internationalised, it is still possible to be very successful in them as a non-English speaker though this will probably change over the next ten to fifteen years.

Alternatively, in order to be successful in more globalised industries, including information technology, education and fast-moving consumer goods as well as professional and financial services, one must speak English. According to one recruiter, 80 per cent of firms in these sectors are multi-national corporations or local businesses that deal internationally.

Most FDI is in the south and southeast, correlated to higher socio-economic groupings, though this is slowly expanding. More importantly, however, is the fact that Brazil is viewed externally as a place not only to set up factories and operational centres, but also headquarters, research and development hubs and sales and marketing centres. However, due to the inefficiencies in the Brazilian education system and the lack of English proficiency, it is difficult for companies to set up these executive and strategic functions, as there is a dearth of local talent that has the education and training to succeed in them; if conditions were more conducive, Brazil would be even more attractive to investors.

Internationalisation of higher education

It is the aspiration of most Brazilian universities to internationalise but only in recent years has the process become institutionalised. Formerly, faculties would develop singular programmes, largely dependent on staff relationships and similar courses, and funding would come from a departmental budget. The process of internationalisation is becoming centralised in many institutions, with special attention being given to student mobility and research as well as the role of English as an academic lingua franca. The popularisation of the Brazilian Association of International Education (FAUBAI) is testament to the degree of internationalisation across Brazilian tertiary education. This group of institutional international administrators was

⁴³ GlobalEnglish, “Business English Index,” 2012.

⁴⁴ Economist Intelligence Unit, “Competing across borders,” 2012.

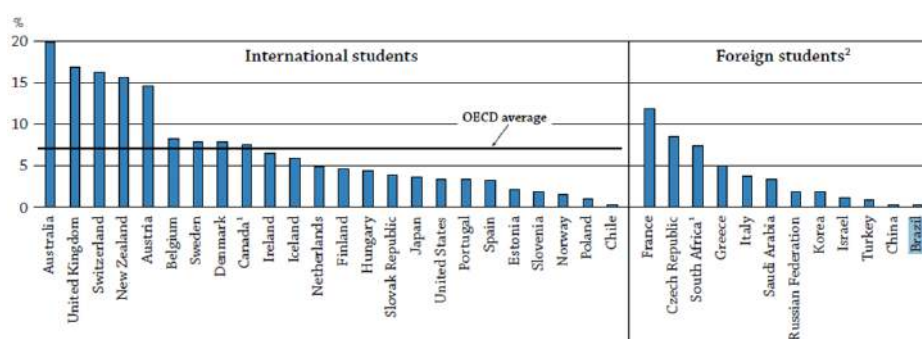
⁴⁵ Catho, “Inglês na ponta da língua,” Retrieved from: <http://blog.catho.com.br/2011/11/30/ingles-na-ponta-da-lingua/>.

⁴⁶ Euromonitor, 2014

created to ensure a complementary and consolidated approach and further develop internationalisation processes in Brazil, and mirrors many other national associations of this kind globally.

As of 2011, 215,000 Brazilian students studied abroad, largely in language learning courses of three months or less^{47,48}. It is interesting to note that the countries most favoured by Brazilian students include Canada, US, UK, Australia, Ireland, France, Spain and New Zealand; however those most visited by students are the US, France, Portugal, Germany and Spain⁴⁹. In 2009, UNESCO calculated the Brazilian outbound mobility ratio at 0.4 per cent⁵⁰. While the US is most favoured for undergraduate and graduate courses, it has been historically difficult for Brazilian students to enrol and for Brazilian universities to partner with American – or any nation's – universities for two salient reasons. Firstly, given that Brazil's best institutions are public and therefore government-funded, partnering with an excellent university internationally almost always brings up questions of who is responsible for exchange student fees, for example⁵¹. Further, for programmes with English-medium universities, often Brazilian students' levels of English are not high enough to succeed in an English language academic environment; the Science without Borders programme has also highlighted this issue. English in Brazil has historically not been seen as fundamental to tertiary education, but this is changing slowly on the institutional level but also on the individual level, as more students enrol in higher education.

International enrolments as a percentage of total enrolments in Brazil remain low.



1. Year of reference 2010.

2. Foreign students are defined on the basis of their country of citizenship, these data are not comparable with data on international students and are therefore presented separately in the chart.

Countries are ranked in descending order of the percentage of international or foreign students in total tertiary education.

Source: OECD

Inbound mobility of students is not high, with UNESCO calculating just 15,221 inbound students studied in Brazil in 2012⁵². This is not due to lack of interest in studying in Brazil but rather due to the fact that English is rarely a medium of instruction in Brazilian universities; therefore unless a student is learning or fluent in Portuguese, they will not be able to succeed academically in Brazil. The topic of English as a medium of instruction is widely discussed in academic circles, with some consensus around the idea that to internationalise effectively, English must be used as a medium of instruction in at least some faculties. As of now, despite the fact that some academics can speak English, few feel comfortable leading a class or course in the language. As a result, there is a need to further train academics in English for instruction.

Faculty apprehension towards English language affects internationalisation in one other key way as well. International rankings are largely based on the amount of English medium published research produced by a university. As such, in order to be more globally recognised, there is a need for professors to publish more in English. Anecdotally, in the hard sciences, research is published in English; even the Brazilian Journal of Physics, for example, is published in English and one university in particular now allows doctoral candidates to defend their dissertations in English. However, publishing in English in the humanities can be a sensitive topic due to the ideological issues surrounding English as a lingua franca and perceived attitudinal issues with regards to non-native English speakers publishing in English.

⁴⁷ The Brazilian Educational and Language Travel Association (BELTA), 2014

⁴⁸ ICEF Monitor, "Boosting Brazilian demand for long-term overseas study," 14 March 2014. Retrieved from: <http://monitor.icef.com/2014/03/boosting-brazilian-demand-for-long-term-overseas-study/>

⁴⁹ The Brazilian Educational and Language Travel Association (BELTA), 2014

⁵⁰ UNESCO, Retrieved from: <http://www.uis.unesco.org/Education/Pages/international-student-flow-viz.aspx>

⁵¹ The Brazilian Educational and Language Travel Association (BELTA), 2014

⁵² UNESCO, Retrieved from: <http://www.uis.unesco.org/Education/Pages/international-student-flow-viz.aspx>

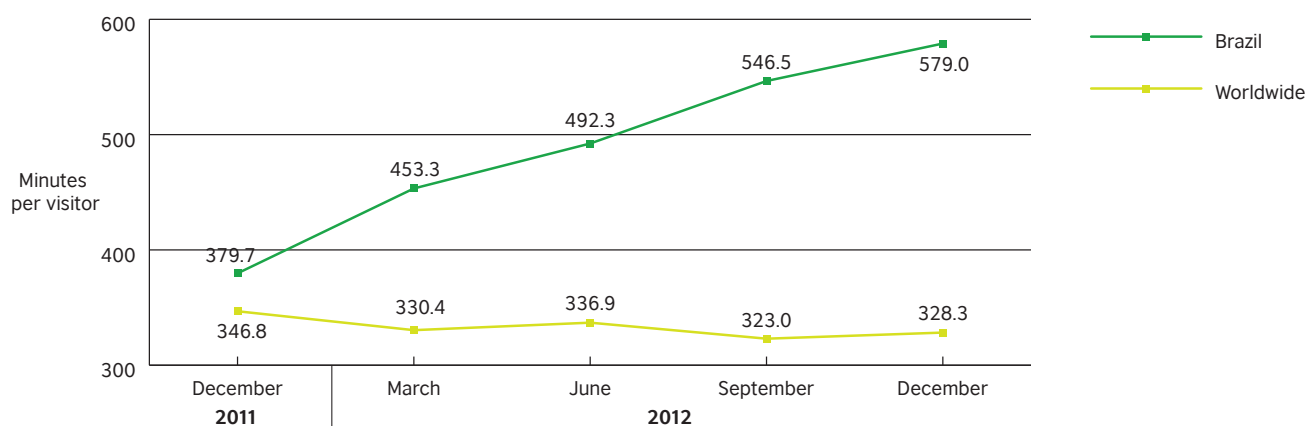
Media and technology

The use of technology in Brazil continues to grow, largely fuelled by the expansion of the middle class. The C class now views personal technology as an investment and despite slow growth since 2006 in the sector, the telecommunications industry is forecast to be the fastest growing in terms of consumer expenditure to 2020, with a predicted 55.7 per cent real increase from 2012⁵³.

Brazil had nearly 100 million Internet users as of 2013⁵⁴, approximately 40 per cent of whom logged on daily⁵⁵. According to digital marketing company eMarketing, Internet penetration is roughly at 50 per cent presently⁵⁶. It's important to note that many users still access the Internet from cafes, rather than their own homes⁵⁷. That said, home Internet access is rapidly on the rise and majority of Internet users in Brazil are under the age of 35, though Brazilians of all ages are going digital. The percentage of mobile phone users will also continue to rise; currently 20 per cent of mobile phone owners own smartphones⁵⁸.

Social networking is extremely popular in Brazil and 79 per cent of its Internet users, equal to 78.3 million people, are active on social media⁵⁹. In fact, 36 per cent of time spent online by Brazilians is on social networking sites, including but not limited to Facebook, YouTube, Twitter and Orkut⁶⁰. As of 2013, there were approximately 65 million Facebook users, more than any other country in the world, save the United States, and the number of social networkers is forecast to continue its rise.

Brazilians are spending increasing amounts of time on social media.



Note: ages 15+; home and work locations

Source: comScore Inc., "2013 Brazil Digital Future in Focus," March 14, 2013

Social networking is complementary to Brazilian culture, which is both inclusive and communal. As such, social media has played a role in not only sharing individuals' lives but also bringing people together for events and even protests. Some of the sites visited by Brazilians are in English and English-language music, movies, TV and video games have taken hold in the market, especially with the younger generations.

According to our survey data, 18 per cent of those with self-assessed strong reading skills attributed them to the use of the Internet and social media. Further, over 50 per cent of those who said they had strong spoken English said it was mainly due to popular English-medium cultural products and media. It is clear that the Internet and media play a role in developing interest in and the improvement of English language skills; however in Brazil technology and media are currently not primary learning tools. That said, there are currently over one million students enrolled in online classes in Brazil⁶¹.

⁵³ Euromonitor, 2014

⁵⁴ Guimaraes, T., "Brazil Social Media: The Middle Class Goes Mobile," eMarketer, June 2013. Retrieved from: <http://exp.co/wp-content/uploads/2013/12/BrazilSocialMedia.pdf>

⁵⁵ To Be Guarany, Dados, Estatísticas e Projeções sobre a Internet no Brasil." Retrieved from: http://tobeguarany.com/internet_no_brasil.php

⁵⁶ eMarketer, "Brazil's Social Audience Keeps Growing, as New Web Users Join In," 26 June 2013. Retrieved from: <http://www.emarketer.com/Article/Brazils-Social-Audience-Keeps-Growing-New-Web-Users-Join/1010003>

⁵⁷ BBC Country Profile, 2012

⁵⁸ Guimaraes, T., "Brazil Social Media: The Middle Class Goes Mobile," eMarketer, June 2013. Retrieved from: <http://exp.co/wp-content/uploads/2013/12/BrazilSocialMedia.pdf>

⁵⁹ eMarketer, "Brazil's Social Audience Keeps Growing, as New Web Users Join In," 26 June 2013. Retrieved from: <http://www.emarketer.com/Article/Brazils-Social-Audience-Keeps-Growing-New-Web-Users-Join/1010003>

⁶⁰ comScore, "2013 Brazil Digital Future in Focus," 7 March 2013.

⁶¹ Adkins, S.S., "The 2013-2018 Brazil Digital English Language Learning Market," April 2014. Retrieved from: <http://www.ambientinsight.com/Resources/Documents/AmbientInsight-2013-2018-Brazil-Digital-English-Language-Learning-Market-Abstract.pdf>

Online learning of the English language has not really taken hold in Brazil the way many expected it would. On paper, the conditions are present for its success: the majority of Brazil's population is cost-sensitive, beginning to become very Internet-savvy, and interested in personal growth. However, online programmes have historically not been particularly successful when not accompanied by an in-person component. According to our employer survey, 62 per cent of respondents stated that face-to-face interaction was most important when learning English. Further, for those willing to put money towards English language learning, there are a myriad of in-person options available in terms of cost and availability. Those courses that offer an online supplement are seen as having a value-add as they allow the learner the flexibility to use the technology at his or her discretion. Those for whom cost is an issue would be the primary market for an online programme, but much of that population doesn't have regular online access.

Shifting English sentiment, by generation

Perceptions of English are changing and for the purposes of this research we can split the population of potential English language learners into three distinct groups: the youth demographic, born after 1985, the adult demographic, born between 1965 and 1985, and the older (though not old) generation, born prior to 1965.

As discussed earlier, in Brazil, English is often inextricable from the concept of imperialism, and much of the older population in Brazil does not see a high value in English language acquisition; there is a sentiment that Brazilians do not and should not need English to succeed that in part results from living through an era of military dictatorship.

The adult generation is varied in their perceptions of English but a few trends do surface. Firstly, many of this demographic have had some experience with English, usually in basic and secondary education. However, due to the inadequacies in the system, those first exposures to English were not positive and as such there is a significant part of the adult population that feels negatively towards the language. That said, the adult English language learning market is huge, for a number of reasons. Firstly, there is a population of adults who eschewed English while growing up for the aforementioned reasons but in adulthood realise they need it to be increasingly employable. Secondly, there is a section of adults that did, in fact, learn English in their youth but did not use it for a number of years and therefore needs to take classes again in adulthood to increase their job prospects. Adults in Brazil generally know the importance of English in certain areas of business and functions, including communicating internationally, accessing materials and negotiating effectively; of English non-learners who wanted to learn English for increased employment prospects in our English language survey, 71 per cent were between the ages of 25 (born slightly after 1985) and 35.

Yet another group of adult learners exist, who are brand-new to English and from low to middle class backgrounds; often those who cannot afford English classes are faced with the choice after secondary school of whether to invest in private university or English classes. Inevitably, students will choose university, leaving aspirations for English language learning to adulthood, when they may be able to afford it. This is a reminder that English in Brazil is, in fact, not viewed as part of education or even as an extracurricular, but as a luxury.

According to our survey, 52 per cent of those born after 1985 have studied English in some form. There are two distinct attitudes that emerge from the youth in Brazil with regards to English. The first is similar to older age groups, partially due to sentiments passed through generations and to bad experiences with the English language; some students feel a lack of interest in the language and that English has been forced on them when they do not have the time for it. They are unmotivated by the basic education curriculum and become frustrated with the amount of time it takes to master the language.

The second group believes English is part of the package for personal growth. These students are generally from middle to upper class backgrounds and are open to migration, though it is not a goal. The youth of Brazil are mostly exposed to the American way of life through popular culture. As a result, many of the younger students will enrol in schools that teach American English and are oriented towards American English proficiency tests, like the TOEFL (currently over half of the English taught in Brazil is American English). In many communities, it is common to hear Portuguese peppered with English words and phrases and many teenagers wear clothes and accessories with English words and brands written on them. For these students, English is not a luxury, but a necessity.

Opportunities in Brazil

There are markets for English language learning in Brazil at the school and tertiary level, in tandem with government programmes and with the cooperation of private companies. According to British Council estimates, the total market of English learners totals just over 43 million, or 21 per cent of the population. Currently, effective English language provision is mostly delivered through private English language schools in urban areas, especially in the South and Southeast, catering to the middle and upper socio-economic classes. There is no cohesive English language government policy and as such, there are areas of opportunity due to the following considerations:

- There is a lack of interest in English language in the D and E classes due to the inapplicability of English to their daily lives and careers, high costs and lack of access (both face-to-face and online)
- There is no standardised evaluator system either in the education sector or the business sector that allows individuals to objectively measure their own and others' level of English proficiency
- There is a market for adult English training, particularly through corporations, for the purpose of increasing employability and contributing to high-value business operations
- There exists a small movement towards teaching more tertiary-level classes in English in order to attract foreign students, allow local students to learn in English and increase the confidence of professors in English language teaching and publishing
- Technology and social media usage, albeit mostly in Portuguese, is rising rapidly, though online learning has not yet been successfully exploited

In conclusion

Brazil's complex history, inclusive of inward migration and periods as a colony, dictatorship and military state, has precipitated an anti-hegemonic sentiment that permeates its policies and governance. Alongside its anti-imperialist position on foreign policy and trade, Portuguese linguistic history and unique culture - coined 'Brazilianism' - the Brazilian government has implemented a democratic approach in its foreign language education policy.

Brazil does not have a policy that focuses solely on teaching and learning English. The National Education Guidelines identify English as one of many foreign languages offered to students in primary and secondary education. Various English language learning initiatives have emerged at the federal, state and municipal levels however many English initiatives have limited success due to unbalanced curriculums, limited class time, teachers lacking the linguistic and pedagogical knowledge to effectively guide students, and minimal resources.

Despite the lack of a unified policy and inefficiencies in the school system, English is becoming recognised as an important language for employment and international communication. There exists a clear correlation between levels of education and English language levels, though this relationship may not be causal. As the nation's economy grows and the C class becomes wealthier, it is not just the A and B classes learning English, but also the C class, for whom English is now an attainable luxury that will help maintain and grow their economic status. Despite the plethora of private programmes, cost and perceived irrelevancy remain barriers to English for the D and E classes.

Those working in internationalised industries, especially in management roles, do need English for employment though they may use it sparingly. As FDI and interaction with other countries grow, especially in localised sectors, the demand for English as a medium of communication will increase. Currently, Brazil's average level of education and lack of English are perceived by some as detrimental to its economic growth and investment.

Investment in internationalisation at the tertiary level is growing, with universities institutionalising the process and coming together in associations such as FAUBAI. The importance of English, especially in the hard sciences, is gaining attention partially due to the Science without Borders and Languages without Borders programmes, but also for the purpose of increasing student mobility and rankings which are now high priorities for Brazilian universities. Technology use is expanding, in tandem with growth in the C class, and social media usage by Internet users is high, however online mechanisms for English language learning remain anecdotally unpopular.

Perceptions of English language use are changing. Younger generations are more open to English and link it less to a political agenda and more with personal growth and opportunity. Although there seem to be deeply-rooted ideological barriers at a national level to prioritise English over other languages, at an individual level, the language is gaining increased value and influence.

"Without English there is no internationalism" – Brazilian government official
