THE TEFL INSTITUTE · RESEARCH TEAM

The State of TEFL 2027

Europe

Europe edition · Published November 2026

Teaching English in Europe in 30 pages and 16 charts: who is learning, what is officially paid, the legal wage floor in each country, what the money buys, who has the right to work and when the hiring happens. Twelve country profiles. Every figure dated and sourced.

47%
of Europeans can hold a conversation in English

97.7%
of EU lower secondary pupils learn English

€850 – €1,670
official assistant pay a month, six countries

12
country profiles, from Spain to Poland

Published by The TEFL Institute · teflinstitute.com
New datasets read 19 November 2026 · Assistant programme figures for France and Spain verified 17 October 2026
Qualification references confirmed against the Ofqual register 1 September 2026
How to cite this report is on the last page.

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How to read the charts

Every chart and table carries its source and its basis. Three colours are used throughout, and a figure is never shown in a colour it has not earned.

Official
Published by a government, regulator, statistical office or the programme itself, and dated. Green.

Market estimate
Compiled from job listings and guides in March 2026 for the global edition; not re-verified. Blue.

Survey or derived
A survey result, or arithmetic on a published figure, and labelled as such. Amber.

Dates that matter

What	When it was checked
British Council assistant allowances, hours and dates (2027–28 placements)	19 November 2026, on the British Council's own page
Eurostat minimum wages, price levels and school language data	19 November 2026; primary releases and named secondary reports
EF English Proficiency Index 2025, European scores and ranks	19 November 2026; secondary tabulation of the EF report
Eurobarometer, Europeans and their languages	19 November 2026; European Commission release of 21 May 2024
TAPIF and NALCAP pay and application windows	17 October 2026, on each programme's own page (global edition)
Qualification references (Ofqual register)	1 September 2026, by hand (global edition)
Market pay, cost-of-living and season estimates	Compiled March 2026; labelled wherever they appear

How this edition relates to the global report. This is the Europe edition of The State of TEFL 2027. It carries forward the European figures from the global edition unchanged and adds eight datasets read for Europe on 19 November 2026. Where a figure could not be sourced it is left out and the gap is stated.

SECTION 1

Executive summary

> **In one paragraph.** Europe is the region where English is most widely taught at school and least well documented as a teaching market. Eurostat counts 97.7% of lower secondary pupils in the EU learning English, and the Commission's 2024 Eurobarometer finds 47% of Europeans can hold a conversation in it, rising to 70% of those aged 15 to 24. No source this report could verify publishes Europe's share of the global English-teaching market. The only teaching pay that is published is for language assistants: between €850 and €1,670 a month for 12 to 16 hours a week in six European countries, on the British Council's 2027–28 figures. Every other salary figure is a market estimate, and the legal minimum wage, from €838 a month in Hungary to €2,391 in Ireland, is the floor to test an offer against.

This edition is written for a teacher choosing between European countries: an EU or Irish citizen who can work anywhere in the EU without a visa, and a UK, US or other non-EU citizen who cannot.

If you hold	Your main question	Start at
An Irish or other EU passport	Which country, on what pay, against what prices	Section 4, then the profiles in Section 5
A British passport	Which routes are open without an employer-sponsored permit	Sections 4 and 6
A US, Canadian or other non-EU passport	Which schemes come with a permit, and when they open	Section 4, data block, and Section 6
A place on an assistant scheme already	What the allowance buys and what to do in summer	Sections 4 and 7

What is new in the Europe edition

- **Official assistant pay for six countries**, read on the British Council's page on 19 November 2026: Austria, Belgium, France, Germany, Italy and Spain, with Switzerland alongside.
- **A legal wage floor for eleven countries**: Eurostat's national minimum wages for 1 January 2026, and the UK's National Living Wage from 1 April 2026.
- **Price levels for eleven countries**, from Eurostat's 2025 figures, so that pay can be read against local prices.
- **English proficiency for 23 EU countries** from the EF English Proficiency Index 2025, with the gap between reading and speaking scores.
- **Demand measured two ways**: what adults say they can do (Eurobarometer 2024) and what pupils are taught (Eurostat, 2023 school year).
- **Border and mobility changes with dates**: the EU Entry/Exit System, the delayed ETIAS authorisation and the UK–EU Youth Experience Scheme talks.

Five numbers to carry

Figure	Value	Source and date
Europeans who can hold a conversation in English	47%; 70% of those aged 15 to 24	European Commission, Special Eurobarometer, 21 May 2024
EU lower secondary pupils learning English	97.7% (2023)	Eurostat, foreign language learning statistics
Official assistant pay, six European countries	€850 to €1,670 a month for 12 to 16 hours a week	British Council, 2027–28 placements, read 19 November 2026
Legal minimum wage, countries profiled	€838 (Hungary) to €2,391 (Ireland) a month gross	Eurostat, 1 January 2026
Highest English proficiency in the world	Netherlands, score 624, rank 1 of 123	EF English Proficiency Index 2025

AT A GLANCE

Twelve numbers and ten findings you can quote

Start here. Twelve figures carry most of the argument in the pages that follow. Each shows its source underneath; the context, caveats and charts are in the sections named in the contents.

47%
Europeans who can hold a conversation in English
Eurobarometer, 21 May 2024

70%
Of 15 to 24 year olds in the EU, the same measure
Eurobarometer, 21 May 2024

97.7%
EU lower secondary pupils learning English, 2023
Eurostat

82.6%
EU primary pupils learning English, 2023
Eurostat

624
Netherlands' EF score, first of 123 countries and regions
EF EPI 2025

513
Italy's EF score, lowest of the 23 EU countries ranked
EF EPI 2025

€1,670
Highest official assistant pay a month, net (Austria, 13 hours a week)
British Council, 2027–28

€850
Lowest official assistant pay a month, net (Italy, 12 hours a week)
British Council, 2027–28

€2,391
Ireland's monthly minimum wage, highest of the countries profiled
Eurostat, 1 Jan 2026

€838
Hungary's monthly minimum wage, lowest of the countries profiled
Eurostat, 1 Jan 2026

139.6
Ireland's price level, EU = 100; Poland is 71.1
Eurostat 2025, via Euronews

10 Apr 2026
EU Entry/Exit System fully operational at Schengen borders
European Commission

Ten findings in citable form

Each sentence stands alone, with its source and date, so it can be quoted without the surrounding text.

1. Almost half of Europeans (47%) can hold a conversation in English, and 70% of those aged 15 to 24 can (European Commission, Special Eurobarometer, 21 May 2024).
2. In 2023, 97.7% of lower secondary pupils and 82.6% of primary pupils in the EU were learning English (Eurostat).
3. The Netherlands ranks first of 123 countries and regions in the EF English Proficiency Index 2025 with a score of 624; Italy, at 513, is the lowest of the 23 EU countries ranked (EF, November 2025).
4. The Netherlands scores 634 for reading but 514 for speaking in the EF index, a gap of 120 points (EF EPI 2025, secondary tabulation).
5. British Council language assistants are paid between €850 net a month (Italy) and €1,670 net a month (Austria) for 12 to 16 hours a week on 2027–28 placements (British Council, read 19 November 2026).
6. France's assistant allowance is €1,010.67 gross a month, the same figure on the French and British programme pages (Villa Albertine, 17 October 2026; British Council, 19 November 2026).
7. Among the countries profiled, the gross monthly minimum wage on 1 January 2026 ranged from €838 in Hungary to €2,391 in Ireland; Italy has no statutory national minimum wage (Eurostat).
8. Consumer prices in Ireland were 39.6% above the EU average in 2025 and in Poland 28.9% below it (Eurostat, reported by Euronews, 25 June 2026).
9. An EU citizen needs no work visa to teach in any of the 27 EU member states; since 10 April 2026 non-EU visitors are recorded by the EU Entry/Exit System at Schengen borders (European Commission).
10. No source this report could verify publishes Europe's share of the global English language training market; Market.us publishes a regional share for Asia-Pacific only (Market.us, 26 August 2025).

SECTION 2

Europe in the global market

How big is the European market? Nobody publishes a figure this report could verify. Market.us values the global English language training market at US$89.5 billion in 2024 and forecasts US$181.1 billion by 2034, and gives one regional share: Asia-Pacific, 42%. The other 58% is not broken down, so Europe's share is stated as unknown, not estimated.

US$89.5bn
Global ELT market, 2024
Market.us, 26 Aug 2025

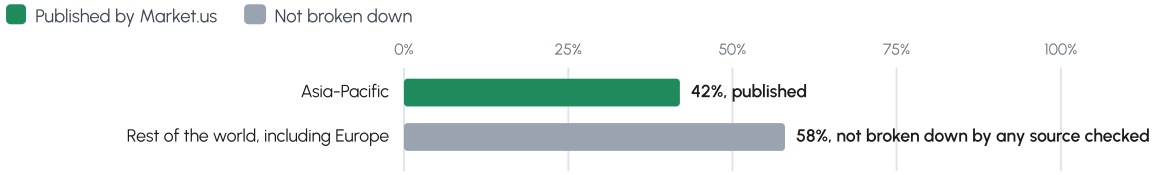
42%
Asia-Pacific share, the only regional share published
Market.us

Not published
Europe's share of the market
No verifiable source found

48%
Online share of ELT by method, worldwide, 2024
Market.us

What is published and what is not

Share of the global English language training market, 2024, per cent



Source: Market.us, English Language Training (ELT) Market, 26 August 2025; checked on the publisher's page 1 November 2026 for the global edition.

Why Europe is hard to size

- **Most English teaching in Europe happens in state schools**, taught by local teachers on national pay scales. That is education spending, not a market a research house can count.
- **The private sector is fragmented**: small academies, freelance teachers and in-company trainers, with no trade body that reports continent-wide figures.
- **The March 2026 edition quoted roughly 30% for Europe.** That figure came from a LinkedIn estimate and was withdrawn in the global edition's corrections ledger. It is not used here.

How Europe differs from the other regions

	Europe	East Asia	Gulf
Typical work	Private academies, in-company and adult classes, school assistant schemes	Government programmes and private academies	International schools and salaried posts
Published pay	Assistant stipends only (Section 4)	JET and EPIK publish full-time scales	None published
Right to work	None needed for EU citizens in the EU	Work visa; degree required	Work visa; degree required
Housing	Not usually provided	Provided on EPIK; own cost on JET	Usually provided
Proficiency of learners	High to very high in most countries (Section 3)	Lower on the EF index	Lower on the EF index

What this means for a teacher. Europe is not where the highest cash pay is. It is where an EU or Irish passport removes the visa, the degree requirement and the document legalisation that East Asia and the Gulf impose, and where learners arrive with more English than anywhere else.

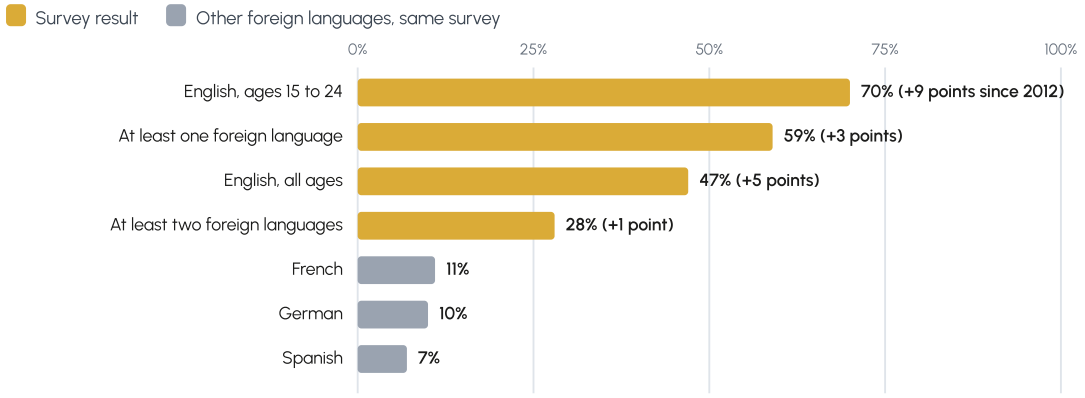
SECTION 3

Demand: what Europeans say they can do

How many Europeans speak English? Almost half. The European Commission's Special Eurobarometer on Europeans and their languages, published on 21 May 2024 from 26,523 interviews across the EU, found that 47% can hold a conversation in English as a foreign language, five points more than in 2012. Among those aged 15 to 24 the figure is 70%, nine points more.

Europeans who can hold a conversation in a foreign language

Per cent of respondents, EU, 2024



Source: European Commission, Special Eurobarometer, Europeans and their languages, press release of 21 May 2024. Survey result, self-reported.

86%
Say everyone should speak at least one foreign language
Eurobarometer 2024

85%
Name English as the most important language for children's future
Eurobarometer 2024

31%
Of those with a foreign language use it every day (+8 points)
Eurobarometer 2024

26,523
People interviewed across the EU member states
Eurobarometer 2024

CANONICAL DATA BLOCK · EUROBAROMETER 2024

Measure	2024	Change since 2012
Can hold a conversation in English as a foreign language, all ages	47%	+5 points
The same, ages 15 to 24	70%	+9 points
Can hold a conversation in at least one foreign language	59%	+3 points
The same, ages 15 to 24	79% (four in five)	+5 points
Can hold a conversation in at least two foreign languages	28%; 39% of ages 15 to 24	+1 point; +2 points

Three readings for a teacher

- **The gap between generations is the adult market.** If 70% of the young can converse in English and 47% of everyone can, the people who cannot are disproportionately working-age and older adults. They are the learners in evening classes and in-company courses.
- **English has pulled away from every other language.** French, German and Spanish sit at 11%, 10% and 7%. A teacher of English in Europe is teaching the one foreign language most people expect to need.
- **Parents are the demand for children's classes.** 85% of respondents name English as the most important language for children's future, which is the motive behind after-school academies in Spain, Italy, Greece and Poland.

What this number does not say. It is self-reported: respondents judged for themselves whether they can hold a conversation. It is not a test result, and it is not a count of people taking lessons. The tested picture is on the next two pages.

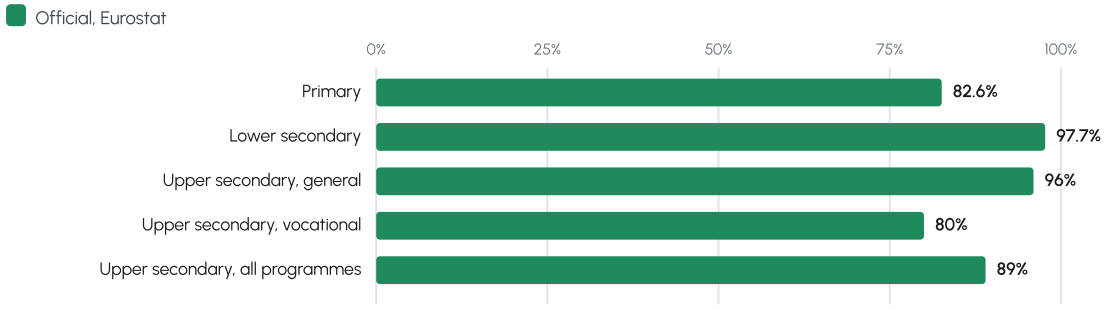
SECTION 3

Demand: what pupils are taught

How much English is taught in European schools? Nearly all of it that can be. In 2023, 82.6% of primary pupils, 97.7% of lower secondary pupils and 89% of upper secondary pupils in the EU were learning English as a foreign language, on Eurostat's figures. In upper secondary general programmes the share is 96%; in vocational programmes it is 80%.

Pupils learning English as a foreign language, EU, 2023

Per cent of pupils at each level of education



Source: Eurostat, Foreign language learning statistics (datasets educ_uoe_lang01 and educ_uoe_lang02), 2023 reference year.

Where the school system leaves a gap

Finding	Value	Why it matters to a teacher
Vocational upper secondary pupils learning English	80%, against 96% in general programmes	One in five vocational students stops English before entering work. They return to it as adults.
Upper secondary general pupils learning English, Portugal	67%, the lowest share in the EU	Portugal has the sixth-highest EF score in the world and the lowest school share at this level: English there is acquired outside the classroom as much as in it.
Upper secondary general pupils learning English, Denmark and Bulgaria	79% and 87%	The only other EU countries below 90% at this level.
Primary pupils learning English in Malta, Cyprus, Spain, Austria and Poland	99% to 100%	English from the first years of school is universal in these countries.
Lower secondary pupils learning English, 2013 to 2023	96.7% to 97.7%	Already close to the ceiling ten years ago. Growth in demand is not coming from more pupils.

What follows

School coverage in Europe is close to complete, so the paid work for a visiting teacher is not in replacing the state school teacher. It sits in three places: beside that teacher, as a language assistant on a government scheme (Section 4); after school, in private academies preparing children and teenagers for exams; and after education, with adults whose English stopped at 16 or 18.

Limits. These figures count pupils enrolled in English, not hours taught or the level reached. Eurostat's upper secondary figure for all programmes (89%) and for general programmes (96%) measure different groups and should not be averaged.

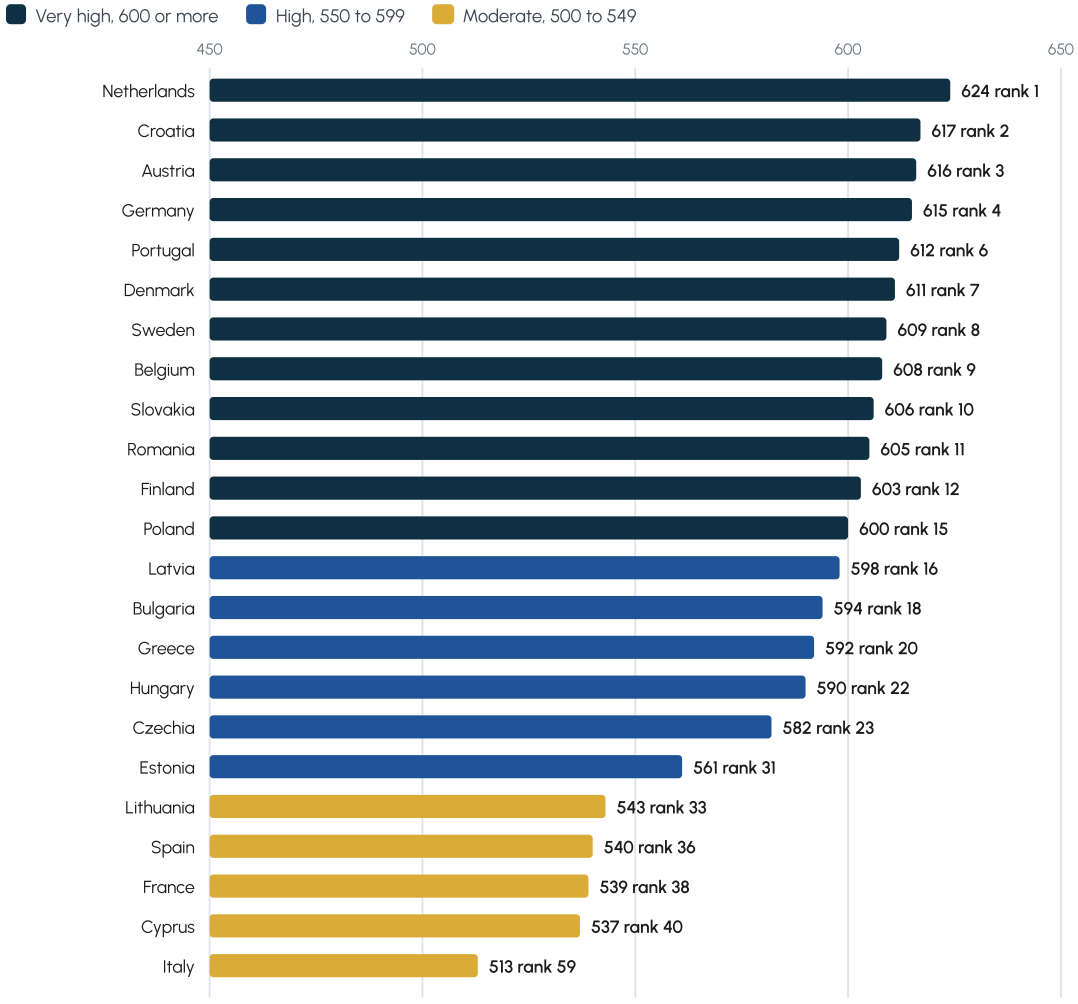
SECTION 3

How well Europe speaks English: the EF index

Which European countries score highest? In the EF English Proficiency Index 2025, published in November 2025 from 2.2 million test takers in 123 countries and regions, the Netherlands ranks first, followed by Croatia, Austria and Germany. Twelve of the 23 EU countries ranked score 600 or more. Five sit in the moderate band: Lithuania, Spain, France, Cyprus and Italy.

EF English Proficiency Index 2025: the 23 EU countries ranked

EF score, with world rank among 123 countries and regions. Ireland, Malta, Luxembourg and Slovenia are not in the index.



Source: EF Education First, EF English Proficiency Index 2025; scores and ranks as tabulated by GermanPedia (1 September 2026) from the EF report, top four checked against EF's launch release. Bars start at 450.

How to read an index like this

- **It ranks test takers, not populations.** The index is built from people who chose to take EF's online test. It is a comparative signal, not a census.
- **Neighbouring scores are not meaningfully different.** Croatia, Austria and Germany are separated by two points.
- **A score is not a pay forecast.** Nothing in the index says what a teacher earns; pay is in Section 4.

The pattern. The three largest Mediterranean teaching markets in this report, Spain, France and Italy, are the three with the lowest scores among the countries profiled. Lower measured proficiency is consistent with more demand for teaching, but the index does not measure demand, and the link is an inference, not a finding of the EF report.

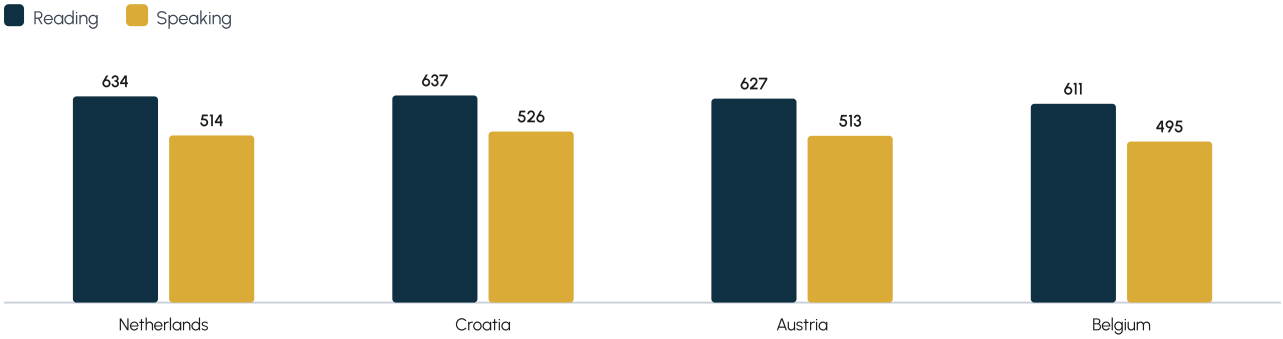
SECTION 3

Reading it well, speaking it less

Where is the gap a teacher fills? In speaking. The 2025 EF index reported productive skills for the first time, and the highest-scoring countries read English far better than they speak it. The Netherlands scores 634 for reading and 514 for speaking. Croatia, Austria and Belgium show gaps of more than 110 points.

Reading against speaking, four high-scoring countries

EF English Proficiency Index 2025 skill scores



Source: EF English Proficiency Index 2025, skill scores as tabulated by GermanPedia (1 September 2026) from the EF report. Secondary source; the EF report was not read directly.

Gaps derived by this report: Netherlands 120 points, Belgium 116, Austria 114, Croatia 111.

The EU by proficiency band

EF EPI 2025 score in each tile. A schematic grid, not a geographic map.



Source: EF EPI 2025 as above. Ireland, Luxembourg, Slovenia and Malta are not in the index; the UK is not ranked as an English-speaking country.

Why it matters. Reading and listening improve with exposure: subtitled television, the internet, school textbooks. Speaking needs a person to speak with. A conversation class with a fluent teacher is the one part of the skill set that the exposure does not supply, in the strongest markets as well as the weakest. This is this report's reading of the scores, not a conclusion EF draws.

SECTION 3

Students who travel to learn: the UK, Ireland and Malta

Where in Europe do English-language schools teach visiting students? Three of the eight major study destinations are European: the United Kingdom, Ireland and Malta. In 2024 the eight destinations together hosted about 1.01 million students, 73% of the 2019 total. The UK took 38% of them. Ireland and Malta are the only two destinations reported above their 2019 student weeks.

38%
UK share of all students in the eight destinations, 2024
EnglishUK, 2025 overview

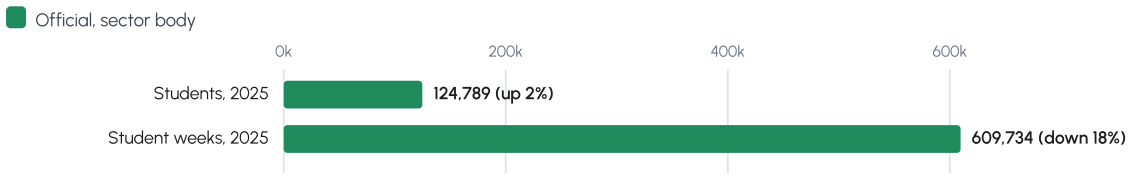
19%
UK share of student weeks: its students are the youngest and stay the shortest
EnglishUK, 2025 overview

124,789
Students in Ireland, 2025, up 2%
English Education Ireland, via ICEF Monitor

4.9 weeks
Average stay in Ireland, 2025; it was 6.4 weeks in 2024
English Education Ireland, via ICEF Monitor

Ireland: more students, fewer weeks

English Education Ireland annual report for 2025



Source: English Education Ireland, Annual Report 2025, as reported by ICEF Monitor, 18 June 2026 (secondary source).

Measure	United Kingdom	Ireland
Students	38% of the eight-destination total, 2024	124,789 in 2025, up 2%
Student weeks	19% of the total, 2024	609,734 in 2025, down 18%
Juniors	62% of UK students are juniors	57% of enrolments; 20% of student weeks
Largest source market	Not stated in the source read	Italy: 47,693 students, about 38% (derived)
Economic contribution	Not stated in the source read	€817.6 million
Against 2019	Below 2019 with the other destinations	Above 2019 student weeks in 2024

What it means for teaching work

- **The work is seasonal and junior.** In both countries most students are under 18 and come for short summer courses. Summer schools hire in volume for June to August and need vetted staff: a DBS check in the UK, Garda vetting in Ireland.
- **Year-round posts follow the adults.** In Ireland adults are 43% of enrolments (derived) but generate 80% of student weeks. Adult weeks are the closest published measure of year-round teaching volume.
- **Shorter stays mean less teaching.** Ireland taught 18% fewer weeks to 2% more students in 2025. Headline student numbers can rise while teaching hours fall.

Malta is named by EnglishUK as above its 2019 student weeks, but no Maltese figures were read for this edition, so none are shown. UK figures are shares only; EnglishUK's country-level counts were not read.

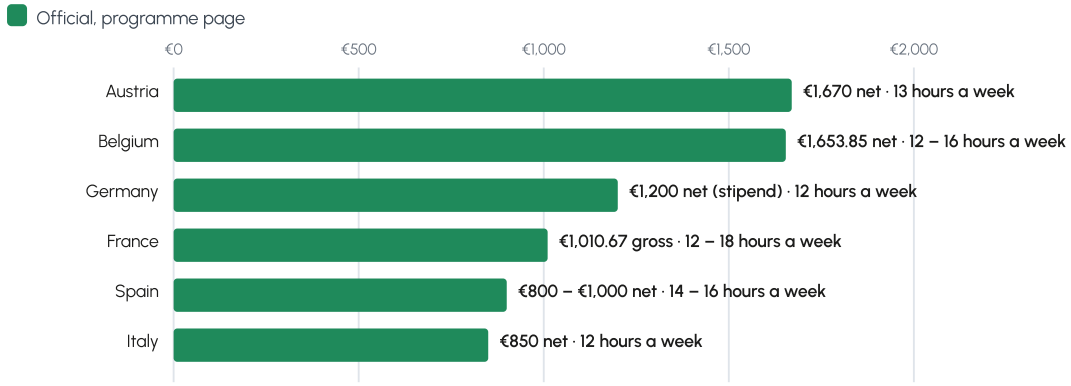
SECTION 4

Pay that is published: the language assistant schemes

Which European teaching pay is official? Only the language assistant schemes. The British Council publishes a monthly allowance for each European country it places assistants in: for 2027–28, from €850 net in Italy to €1,670 net in Austria, for 12 to 16 hours a week. These are part-time stipends for a school year, not full-time salaries.

Monthly allowance, British Council English Language Assistants, 2027–28

Euros a month as published; net unless marked. Spain is drawn at the midpoint of its €800 to €1,000 range.



Source: British Council, Where can I go as an English Language Assistant?, updated for 2027–28 placements, read 19 November 2026. France is gross; the others are net.

Country	Allowance a month	Hours a week	Length	Dates, 2027–28	Language asked
Austria	€1,670 net	13	8 months	1 Oct – 31 May	A2 German
Belgium	€1,653.85 net	12 – 16	8 months	1 Oct – 31 May	B1 French
Germany	€1,200 net (stipend)	12	5 or 8 months	mid-Sep – 31 May	A2 German
France	€1,010.67 gross	12 – 18	7 months	1 Oct – 30 Apr	B1 French
Spain	€800 – €1,000 net	14 – 16	8 to 9 months	1 Oct – 31 May or 30 Jun	None
Italy	€850 net	12	8 months	1 Oct – 31 May	B1 Italian
Switzerland	CHF 2,600 net	12	10 to 11 months	Aug/Sep – May/Jul	A2 French or A1 German

Reading the table

- **Austria and Belgium pay about twice what Italy does** for the same hours. An applicant choosing by income alone has a clear answer; one choosing by language has a narrower one, because six of the seven destinations set a language requirement.
- **Spain asks for no language** and is the only destination that does not.
- **France's figure is gross.** The French programme's own page gives about €810 net (Villa Albertine, 17 October 2026).
- **Germany restricts other work.** The British Council states that the residence permit does not allow assistants to take official secondary employment in Germany.

Who can apply. These are the British Council's figures for applicants from the UK. Other countries run their own routes to the same posts: TAPIF for applicants from the United States and NALCAP for North Americans (next page), and Ireland's Department of Education English Language Assistant Scheme, which published 2026/27 terms for Austria, France, Germany, Italy and Spain. The host-country allowance is set by the host, but each sending scheme's terms should be read on its own page.

SECTION 4

The assistant schemes: data block and application windows

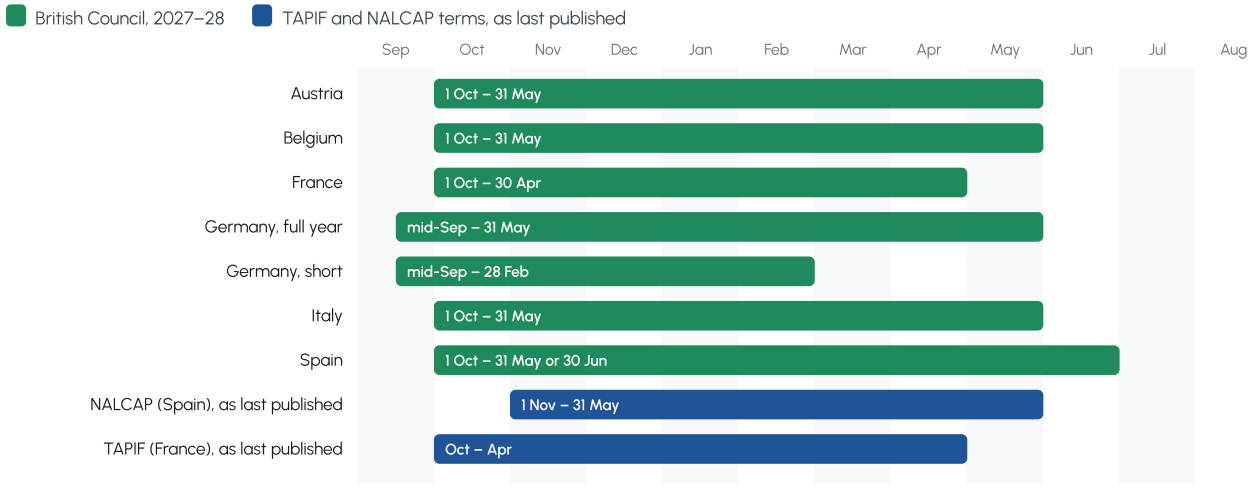
> **When do the schemes open?** As published on 17 October 2026, France's TAPIF was open from 15 October 2026 to 15 February 2027, and Spain's NALCAP was closed, its last call having run from 2 to 30 June 2026 with no next date published. British Council placements for 2027–28 start between mid-August and 1 October 2027.

CANONICAL DATA BLOCK · OFFICIAL ASSISTANT PAY IN EUROPE

Scheme	Official pay	Hours and term	Open to	Status when read	Source
France · TAPIF Official	€1,010.67 a month gross; about €810 net	Up to 12 hours a week, October to April	Applicants from the United States; ages 20 to 35; B1 French; US$149 fee	Open 15 Oct 2026 to 15 Feb 2027	Villa Albertine, 17 Oct 2026
Spain · NALCAP Official	€800 to €1,000 a month by region	14 to 16 hours a week, 1 Nov to 31 May; medical insurance	North American applicants	Closed; last call 2 to 30 Jun 2026	Spanish Ministry of Education, 17 Oct 2026
British Council ELA · six EU countries Official	€850 to €1,670 a month (previous page)	12 to 16 hours a week; 5 to 9 months	Applicants from the UK	2027–28 details published	British Council, 19 Nov 2026
Ireland · English Language Assistant Scheme Official	Not read for this edition	Not read	Applicants from Ireland	2026/27 terms published for five countries	gov.ie, Department of Education

The assistant year, 2027–28

Placement periods as published, September to August.



Sources: British Council, 2027–28 placements (read 19 November 2026); Villa Albertine and Spanish Ministry of Education (17 October 2026).

Two discrepancies recorded, not resolved

- **Hours in France.** The French programme page read on 17 October 2026 gives up to 12 hours a week; the British Council's 2027–28 page gives 12 to 18. Both are official pages for different sending schemes. An applicant should take the figure in their own contract.
- **Spain through the British Council.** One UK university's guidance read on 19 November 2026 lists Spain as suspended for 2026–27, while the British Council's own pages list Spain for 2026–27 and 2027–28. The British Council page is the one used here.

None of the summer is covered. Every scheme ends by 30 June. An assistant who wants to stay needs summer-school work or private teaching from July, which is why the UK and Irish summer schools in Section 3 recruit from the same pool.

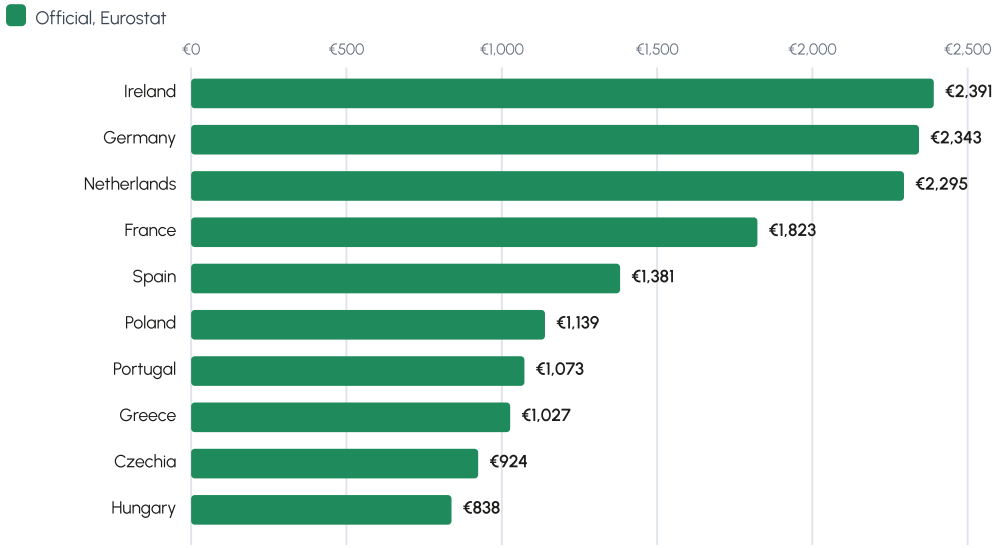
SECTION 4

The legal floor: minimum wages

What is the least a full-time teaching job can lawfully pay? The national minimum wage. Among the countries profiled, Eurostat's figures for 1 January 2026 run from €838 a month gross in Hungary to €2,391 in Ireland. Italy has no statutory national minimum wage. The UK's National Living Wage is £12.71 an hour from 1 April 2026 for workers aged 21 and over.

National minimum wage, euros a month gross, 1 January 2026

Full-time equivalents as published by Eurostat. Italy has no statutory national minimum wage and is not drawn.



Source: Eurostat, national minimum wages (earn_mw_cur), 1 January 2026, as published in Eurostat's release of 30 January 2026 and by EURES, 5 March 2026.

How Eurostat builds the monthly figure

- Where the minimum is set by the hour, as in **Germany, France, Ireland and the Netherlands**, Eurostat converts the hourly rate into a monthly wage.
- Where it is paid in 14 instalments a year, as in **Spain, Portugal and Greece**, Eurostat spreads the 14 payments over 12 months. The figure on a Spanish payslip is therefore lower than the €1,381 shown.
- For **Poland, Czechia and Hungary**, national currency is converted to euros, so the euro figure moves with the exchange rate.

Change during 2026	As reported for 1 July 2026	Source
France	€1,867, up 2.4%	Eurostat, via Euronews, 4 August 2026
Netherlands	€2,338, up 1.9%	Eurostat, via Euronews, 4 August 2026
Greece	€1,073, up 4.5%	Eurostat, via Euronews, 4 August 2026
Spain	€1,425	Eurostat, via Euronews, 4 August 2026

How to use a floor

The minimum wage is not a teaching salary and no country in this report sets one for private language schools. It is the test of whether a full-time offer is lawful. An academy offer of €900 a month for a full-time contract in Spain is below the €1,381 floor; the same €900 for 14 hours a week as an assistant is not, because it is part-time. Hours come first, then the comparison.

Ireland. A Joint Labour Committee for English language schools has been established by statutory instrument (S.I. No. 593 of 2019). This report found no order in force setting a pay rate for the sector, so the national minimum wage is the floor used. **Freelance work**, common in Germany, Czechia and Poland, is not covered by a minimum wage at all.

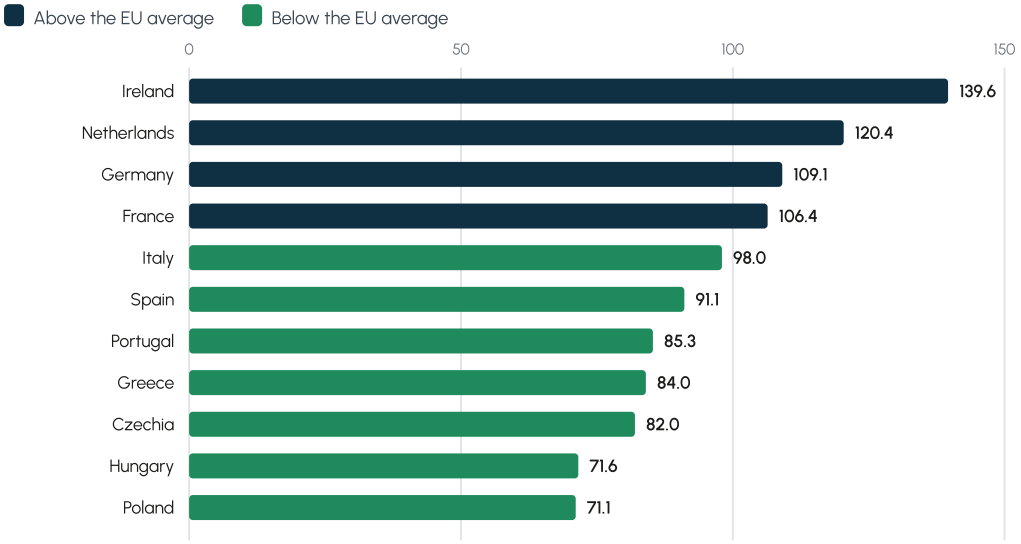
SECTION 4

What the money buys: price levels

Where does a euro go furthest? Poland and Hungary. Eurostat's price level index for 2025 puts consumer prices in Poland at 71.1 and Hungary at 71.6 against an EU average of 100, and Ireland at 139.6. The same basket of goods and services costs almost twice as much in Ireland as in Poland.

Price level for consumer goods and services, 2025

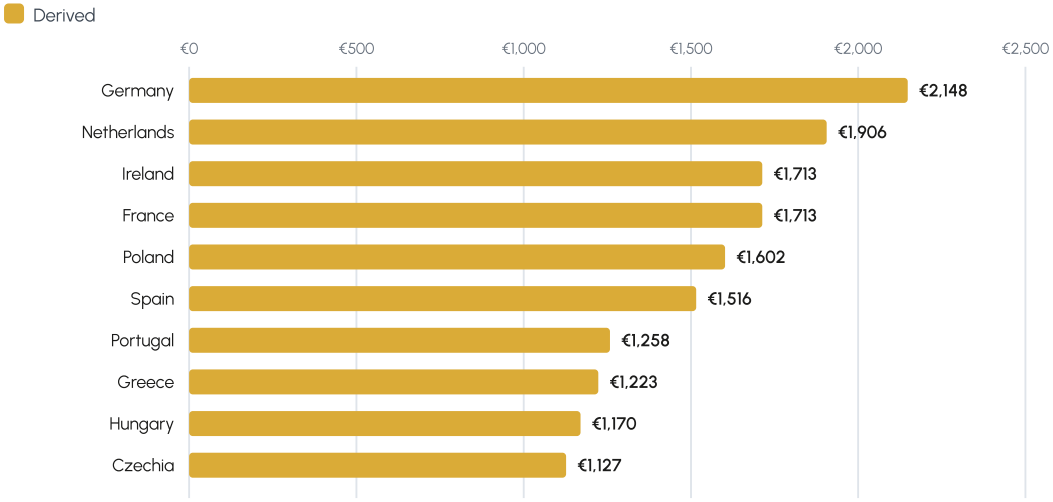
EU average = 100. Actual individual consumption, Eurostat's broader measure.



Source: Eurostat, price level indices 2025 (actual individual consumption), as reported by Euronews, 25 June 2026. Secondary report of official data. The UK is not in the EU figures read.

The minimum wage adjusted for prices

Monthly minimum wage divided by the price level: what the floor buys at EU-average prices. Derived by this report.



Derived: Eurostat minimum wage (1 January 2026) ÷ Eurostat price level (2025). Not Eurostat's own purchasing-power figure, which uses a different price measure; the ordering is consistent with Eurostat's published groups.

Three readings

- **Prices narrow the gap.** In cash, Ireland's floor is 2.9 times Hungary's. Adjusted for prices it is about 1.5 times (derived).
- **Poland moves up.** Poland's cash floor is below Spain's, but after prices it buys more than Spain's and comes close to France's and Ireland's.
- **The index is national.** It does not separate Dublin from Donegal or Warsaw from a small town, and it does not measure rent on its own. Capital-city rent is the largest cost a teacher faces and the one this index hides.

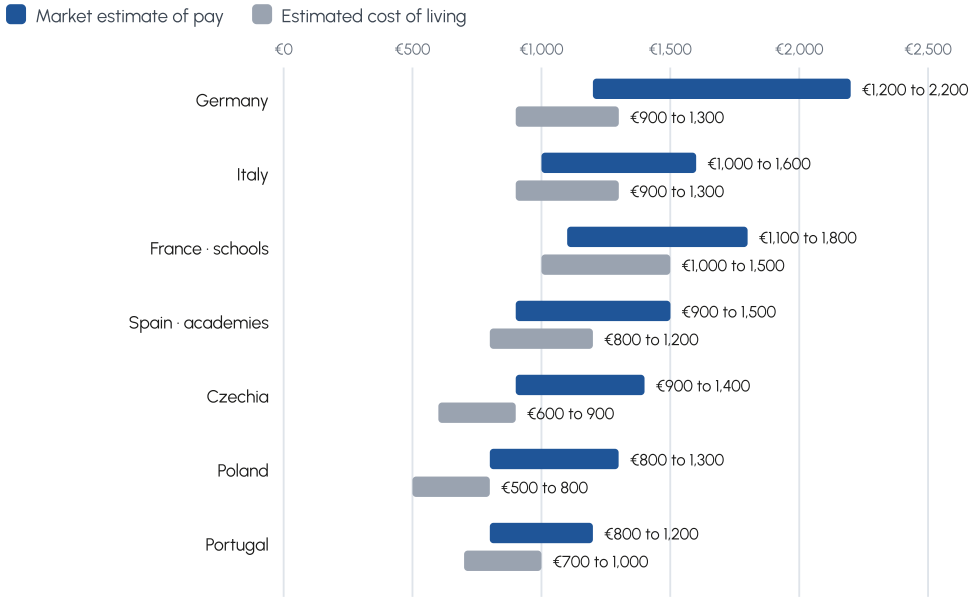
SECTION 4

Market estimates: pay against cost of living

What do private schools pay? No one publishes it. The ranges below are market estimates compiled from job listings in March 2026 for the global edition and carried forward unchanged: Germany €1,200 to €2,200 a month, Italy €1,000 to €1,600, France €1,100 to €1,800, Spain €900 to €1,500, Czechia €900 to €1,400, Poland €800 to €1,300 and Portugal €800 to €1,200.

Monthly pay against monthly cost of living, euros

Seven countries with a market estimate. Blue: pay. Grey: estimated cost of living.



Source: GoOverseas, Teach Away and listings compiled March 2026 for The State of TEFL 2027 global edition; estimates, not re-verified.

Country	Pay estimate	Legal floor, 1 Jan 2026	Bottom of the estimate against the floor
Germany	€1,200 – 2,200	€2,343	Below the full-time floor
France · schools	€1,100 – 1,800	€1,823	Below the full-time floor
Spain · academies	€900 – 1,500	€1,381	Below the full-time floor
Poland	€800 – 1,300	€1,139	Below the full-time floor
Portugal	€800 – 1,200	€1,073	Below the full-time floor
Czechia	€900 – 1,400	€924	About level with the floor
Italy	€1,000 – 1,600	No statutory minimum	No comparison possible

What the comparison shows, and what it does not

In five of the six countries with a statutory minimum, the bottom of the March estimate sits below the full-time legal floor, and in Germany and France the whole range does. A lawful full-time job cannot pay less than the floor, so the estimates are not describing full-time employment. They are consistent with three things this report cannot separate: part-time hours, pay quoted after tax, and freelance contracts paid by the lesson.

- **Ask for the hours.** A typical academy timetable is 20 to 25 teaching hours a week (provider guidance, not verified here). Monthly pay without the hours cannot be compared with anything.
- **Ask whether it is gross or net.** Eurostat's floors are gross. Listings often quote take-home pay.
- **Ask whether you are an employee.** A freelance contract carries no minimum wage, no paid holiday and no employer social insurance.

Status of these figures. The March 2026 compilation was the weakest evidence in the global edition and is the weakest here. It is shown because teachers ask the question, with its limits beside it. No estimate was compiled for Hungary, Greece, the Netherlands, Ireland or the UK, and none is invented for this edition.

SECTION 4

Twelve countries on one page

> **How do the countries compare?** The matrix sets the five measures in this report side by side for the twelve countries profiled in Section 5. Three columns are official and two are not: the pay estimate is a March 2026 compilation, and the EF score is a test-taker index.

CANONICAL DATA BLOCK · EUROPE, TWELVE COUNTRIES

Country	EF EPI 2025 Survey	Minimum wage, month Official	Price level, EU = 100 Official	Market pay estimate Estimate	Official assistant pay, month Official
Spain	540 · rank 36	€1,381	91.1	€900 – 1,500	€800 – 1,000 (NALCAP; British Council)
Italy	513 · rank 59	None	98.0	€1,000 – 1,600	€850 net
France	539 · rank 38	€1,823	106.4	€1,100 – 1,800	€1,010.67 gross
Germany	615 · rank 4	€2,343	109.1	€1,200 – 2,200	€1,200 net
Portugal	612 · rank 6	€1,073	85.3	€800 – 1,200	No scheme read
Czechia	582 · rank 23	€924	82.0	€900 – 1,400	No scheme read
Poland	600 · rank 15	€1,139	71.1	€800 – 1,300	No scheme read
Hungary	590 · rank 22	€838	71.6	No estimate	No scheme read
Greece	592 · rank 20	€1,027	84.0	No estimate	No scheme read
Netherlands	624 · rank 1	€2,295	120.4	No estimate	No scheme read
Ireland	Not ranked	€2,391	139.6	No estimate	Destination, not a host
United Kingdom	Not ranked	£12.71 an hour	Not in EU data	No estimate	Destination, not a host

Sources: EF EPI 2025 (secondary tabulation); Eurostat minimum wages, 1 January 2026; Eurostat price levels 2025 via Euronews, 25 June 2026; UK National Living Wage from 1 April 2026 (gov.uk); March 2026 compilation; British Council 2027–28, Villa Albertine and Spanish Ministry of Education.

Four patterns across the matrix

- **The published pay is in the west and south.** All six host countries with an official assistant allowance are older EU member states. Central Europe has no scheme in the sources read, so everything there is a private offer.
- **Low prices and high English go together in central Europe.** Poland, Hungary and Czechia combine price levels of 71 to 82 with EF scores of 582 to 600: capable learners, low living costs and no published pay.
- **The lowest scores sit with the largest assistant schemes.** Spain, France and Italy are the three lowest EF scores in the matrix and all three run national assistant programmes.
- **The two English-speaking countries are a different job.** In Ireland and the UK the learners are visiting students, the employer is a language school, and the floor is the highest in the matrix.

What each blank means

Entry	Meaning
No estimate	The March 2026 compilation did not cover the country. Nothing is known here about private-sector pay; it is not a sign that pay is low.
No scheme read	No national assistant scheme open to foreign applicants appeared in the sources read. One may exist.
Not ranked	EF does not rank English-speaking countries.
None (Italy)	Italy has no statutory national minimum wage; pay floors are set in sector collective agreements.

How to use it. Pick the row, then go to the country profile for the season, the right to work and what was not found. A blank is information: "no estimate" means none was compiled, not that pay is low.

SECTION 5

Country profiles: Spain and Italy

The two largest assistant markets. Both teach English to nearly every pupil, both score in the EF moderate band, and both run a national assistant scheme. Italy is the lowest-scoring EU country in the index and has no statutory minimum wage.

Spain

Academies from September to June; three assistant routes in the sources read

EF EPI 2025 Survey 540 · rank 36 of 123 · moderate	Minimum wage Official €1,381 a month, 1 Jan 2026; €1,425 reported for 1 Jul 2026	Price level 2025 Official 91.1 (EU = 100)
Market pay estimate Estimate €900 – 1,500 a month in academies; living costs €800 – 1,200	Official assistant pay Official €800 – 1,000 a month for 14 – 16 hours (NALCAP; British Council)	Season Academies September to June; assistants 1 Oct or 1 Nov to 31 May or 30 Jun

Read it as. Spain is where an assistant post is easiest to qualify for: the British Council sets no language requirement, primary school English is universal (99% to 100% of pupils, Eurostat 2023), and posts are in primary schools, secondary schools and state language schools for adults. The stipend is part-time and at the level of the cost-of-living estimate, which is why assistants add private lessons. For a full-time academy job, check the offer against the €1,381 floor and ask for the hours.

Check before you accept.

- The weekly hours: 14 to 16 as an assistant; ask an academy for teaching hours in writing.
- Whether pay is in 12 or 14 instalments. Eurostat's €1,381 spreads 14 payments over 12 months.
- Whether the post ends on 31 May or 30 June.

Not found for this edition. A count of assistants placed; NALCAP's next application date (none published at 17 October 2026).

Italy

The lowest EF score in the EU and no national wage floor

EF EPI 2025 Survey 513 · rank 59 of 123 · moderate	Minimum wage Official No statutory national minimum wage	Price level 2025 Official 98.0 (EU = 100)
Market pay estimate Estimate €1,000 – 1,600 a month; living costs €900 – 1,300	Official assistant pay Official €850 net a month for 12 hours; B1 Italian asked	Season September to June; assistants 1 Oct to 31 May

Read it as. Italy combines the weakest measured English in the EU with near-universal school coverage: all lower secondary pupils learn English (Eurostat 2023). Demand shows up abroad as well as at home, since Italians are the largest group of students in Ireland's English-language schools (47,693 in 2025). The assistant allowance is the lowest of the six countries, and with no legal floor, an academy offer has to be tested against the market range and the contract, not against a statute.

Check before you accept.

- Which collective agreement, if any, the contract cites. Italy sets pay floors by sector agreement, not by statute.
- B1 Italian, which the assistant route requires.
- The start and end dates, and whether anything is paid over the summer.

Not found for this edition. Any sector pay agreement for language schools; a count of assistants.

SECTION 5

Country profiles: France and Germany

The two largest economies. France pays its assistants a published gross figure that two official pages agree on. Germany has the fourth-highest EF score in the world, the highest pay estimates in Europe and a wage floor that the estimates do not reach.

France

A published stipend, a short season and the highest costs of the Mediterranean three

EF EPI 2025 Survey 539 · rank 38 of 123 · moderate	Minimum wage Official €1,823 a month, 1 Jan 2026; €1,867 reported for 1 Jul 2026	Price level 2025 Official 106.4 (EU = 100)
Market pay estimate Estimate €1,100 – 1,800 a month in schools; living costs €1,000 – 1,500	Official assistant pay Official €1,010.67 gross a month, about €810 net; up to 12 hours (TAPIF)	Season October to May; assistants 1 Oct to 30 Apr

Read it as. France is the one country where the assistant figure is exact to the cent and identical on the French and British pages. At about €810 net against a cost-of-living estimate that starts at €1,000, it does not cover a month in a French city on its own. Read it as a funded seven months with twelve hours of teaching, to be combined with savings or private lessons. B1 French is required on both routes.

Check before you accept.

- Gross or net: €1,010.67 gross is about €810 net.
- The hours in your own contract: 12 on one official page, 12 to 18 on another.
- Age and language rules: TAPIF asks for ages 20 to 35 and B1 French.

Not found for this edition. Whether TAPIF's 12 hours and the British Council's 12 to 18 describe the same posts.

Germany

Very high English, year-round hiring and a great deal of freelance work

EF EPI 2025 Survey 615 · rank 4 of 123 · very high	Minimum wage Official €2,343 a month, 1 Jan 2026	Price level 2025 Official 109.1 (EU = 100)
Market pay estimate Estimate €1,200 – 2,200 a month; living costs €900 – 1,300	Official assistant pay Official €1,200 net a month (stipend) for 12 hours; A2 German asked	Season Year-round; assistants mid-September to 31 May, or to 28 Feb

Read it as. Germany's learners are among the most proficient in the world, so the paid work is business English and exam preparation for adults, not beginners' classes. The whole of the March pay estimate sits below the full-time minimum wage, which indicates part-time or freelance contracts, not employment at those rates. The assistant stipend is a published net figure, but the British Council notes that the residence permit does not allow official secondary employment.

Check before you accept.

- Whether you are an employee or freelance. The minimum wage covers employees only.
- As an assistant, that the permit rules out an official second job.
- A full-time employed offer against €2,343 a month gross.

Not found for this edition. The share of English teachers working freelance; any published rate for in-company training.

SECTION 5

Country profiles: Portugal and Czechia

Two very different routes to good English. Portugal has the sixth-highest EF score in the world and the lowest share of upper secondary pupils learning English in the EU. Czechia is the lowest-scoring of its neighbours and one of the cheapest places in this report to live.

Portugal

High proficiency, low prices and low pay

EF EPI 2025 Survey	Minimum wage Official	Price level 2025 Official
612 · rank 6 of 123 · very high	€1,073 a month, 1 Jan 2026	85.3 (EU = 100)
Market pay estimate Estimate	**Official assistant pay**	**Season**
€800 – 1,200 a month; living costs €700 – 1,000	No scheme in the sources read	September to June

Read it as. Portugal's pay estimate is the lowest in this report and its wage floor is among the lowest of the older member states, but its prices are low too. Only 67% of upper secondary general pupils were learning English in 2023 (Eurostat), the lowest share in the EU, alongside one of the highest test scores. That combination points to English learned through media and work, and to a private market for exam preparation and adults. It is a lifestyle choice more than a savings one.

Check before you accept.

- A full-time offer against €1,073, remembering it is paid in 14 instalments.
- Whether the contract pays anything from July to August.
- Rent in Lisbon or Porto. The national price level hides it.

Not found for this edition. Any national assistant scheme open to foreign applicants; city-level pay for Lisbon and Porto.

Czechia

Year-round hiring where the estimate and the floor meet

EF EPI 2025 Survey	Minimum wage Official	Price level 2025 Official
582 · rank 23 of 123 · high	€924 a month, 1 Jan 2026	82.0 (EU = 100)
Market pay estimate Estimate	**Official assistant pay**	**Season**
€900 – 1,400 a month; living costs €600 – 900	No scheme in the sources read	Year-round

Read it as. Czechia is the only country in this report where the bottom of the pay estimate (€900) sits about level with the legal floor (€924), so the estimates here are closer to describing real full-time pay. Its EF score is the lowest among its neighbours: one report puts Germany, Poland and Slovakia a band higher. Year-round recruitment makes it one of the practical options for a start outside September.

Check before you accept.

- Whether you are an employee or freelance.
- Pay in koruna against the floor; the euro figure moves with the exchange rate.
- The city: the estimates do not separate Prague from elsewhere.

Not found for this edition. The balance of employed and freelance posts; pay outside Prague and Brno.

SECTION 5

Country profiles: Poland and Hungary

The two cheapest countries in the report. Poland and Hungary have the lowest price levels profiled, 71.1 and 71.6, and EF scores in the top 25 of 123. Neither has a published teaching scale or an assistant scheme in the sources read.

Poland

Very high English, the lowest prices and a floor that buys a lot

EF EPI 2025 Survey	Minimum wage Official	Price level 2025 Official
600 · rank 15 of 123 · very high	€1,139 a month, 1 Jan 2026	71.1 (EU = 100), lowest profiled
Market pay estimate Estimate	**Official assistant pay**	**Season**
€800 – 1,300 a month; living costs €500 – 800	No scheme in the sources read	Year-round

Read it as. Poland teaches English to virtually every primary pupil (99% to 100%, Eurostat 2023) and has reached EF's very high band. Adjusted for prices, its minimum wage buys about €1,600 at EU-average prices (derived), more than Spain's. For a teacher, that means a modest euro salary goes further here than anywhere else profiled, and that learners are advanced: the work is exam classes, business English and conversation.

Check before you accept.

- Pay in złoty against the floor; the euro figure moves with the exchange rate.
- The level of the classes. Expect B2 and above.
- Whether you are an employee or freelance.

Not found for this edition. A count of private language schools; pay for exam-preparation specialists.

Hungary

The lowest wage floor profiled and no pay data at all

EF EPI 2025 Survey	Minimum wage Official	Price level 2025 Official
590 · rank 22 of 123 · high	€838 a month, 1 Jan 2026	71.6 (EU = 100)
Market pay estimate	**Official assistant pay**	**Season**
None compiled	No scheme in the sources read	Not compiled

Read it as. Hungary is in this report to show what an honest blank looks like. Proficiency is high, prices are almost the lowest in the EU and the legal floor is the lowest profiled, but no pay estimate was compiled in March 2026 and none is invented here. A teacher considering Budapest should treat any quoted salary as a single school's offer, compare it with the €838 floor and the Polish and Czech ranges, and ask for the hours.

Check before you accept.

- The offer against €838 a month gross, in forint.
- The weekly hours and the contract length, in writing: no season was compiled.
- Whether housing or anything else is included.

Not found for this edition. Any pay estimate, teaching season or assistant scheme. These are gaps for the next edition.

SECTION 5

Country profiles: Greece and the Netherlands

> **The private-lesson market and the saturated one.** Greece has a high EF score and a wage floor that rose 4.5% during 2026. The Netherlands is first in the world for English and has the largest recorded gap between reading and speaking.

Greece

High proficiency built on after-school teaching

EF EPI 2025 Survey	Minimum wage Official	Price level 2025 Official
592 · rank 20 of 123 · high	€1,027 a month, 1 Jan 2026; €1,073 reported for 1 Jul 2026	84.0 (EU = 100)
Market pay estimate	**Official assistant pay**	**Season**
None compiled	No scheme in the sources read	Not compiled

Read it as. Greece scores in EF's high band, above Spain, France and Italy. Its minimum wage is paid in 14 instalments, so the €1,027 Eurostat figure is higher than a single month's payslip. No pay estimate was compiled for this edition. The sources read do not describe the Greek private school sector, so this profile makes no claim about how teachers are hired there.

Check before you accept.

- Pay in 12 or 14 instalments.
- The offer against the floor in force: €1,073 was reported for 1 July 2026.
- The weekly hours and the months the contract covers.

Not found for this edition. Pay estimates; hiring season; any description of the private language school sector with a stated source.

The Netherlands

First in the world, and the least room for a general English teacher

EF EPI 2025 Survey	Minimum wage Official	Price level 2025 Official
624 · rank 1 of 123 · very high	€2,295 a month, 1 Jan 2026; €2,338 reported for 1 Jul 2026	120.4 (EU = 100)
Market pay estimate	**Official assistant pay**	**Season**
None compiled	No scheme in the sources read	Not compiled

Read it as. With the highest English proficiency of any country ranked, the Netherlands has little demand for general English classes. The one measured gap is speaking: 514 against 634 for reading (EF EPI 2025, secondary tabulation). Where work exists it is likely to be specialist, such as academic or professional English, but this report found no data on it and says so. High prices and a high wage floor make it the most expensive EU country profiled after Ireland.

Check before you accept.

- What specialism the post needs and how you would evidence it.
- A full-time offer against €2,338 a month gross (reported for 1 July 2026).
- Rent, in the EU's second most expensive country profiled.

Not found for this edition. Any evidence of the size or pay of the Dutch English-teaching market.

SECTION 5

Country profiles: Ireland and the United Kingdom

The two destinations. In Ireland and the UK the learners are visitors, the employers are English-language schools and the peak is summer. Both require vetting to work with under-18s. Ireland is the only English-speaking member state of the EU.

Ireland

Record student numbers, shorter stays, the highest floor and the highest prices

EF EPI 2025 Not ranked (English-speaking)	Minimum wage Official €2,391 a month, 1 Jan 2026, highest profiled	Price level 2025 Official 139.6 (EU = 100), highest profiled
Sector size Official 124,789 students, 609,734 student weeks, 2025	Economic contribution Official €817.6 million, 2025	Peak Summer for juniors (57% of enrolments); adults year-round

Read it as. Ireland's schools taught more students in 2025 than in 2024 but 18% fewer weeks, because the average stay fell from 6.4 to 4.9 weeks. For teachers that means more short summer contracts and fewer long ones. An EU citizen can take a post without a visa; so can a British citizen under the Common Travel Area. Garda vetting is required for work with juniors. The wage floor is the highest in this report and so are prices, by a wide margin.

Check before you accept.

- Garda vetting, and how long before the start date it must be in hand.
- The contract length in weeks. Stays are shortening.
- The hourly rate against the national minimum, which Ireland sets by the hour.

Not found for this edition. A sector pay order (a Joint Labour Committee exists; no rate was found in force); teacher headcount.

United Kingdom

The largest destination by students, and a visa for almost everyone but the Irish

EF EPI 2025 Not ranked (English-speaking)	Minimum wage Official £12.71 an hour from 1 Apr 2026 (age 21 and over)	Price level 2025 Not in the EU figures read
Sector size Official 38% of students and 19% of student weeks across eight destinations, 2024	Juniors Official 62% of UK students	Peak Summer; the most junior mix of any destination

Read it as. The UK takes more English-language students than any other destination but a much smaller share of weeks, because 62% are juniors on short courses. The work is concentrated in summer schools and needs a DBS check. Since Brexit an EU citizen needs a visa to work in the UK; an Irish citizen does not. The Graduate Route is set to shorten to 18 months from January 2027 (UK policy, compiled March 2026), and a UK–EU Youth Experience Scheme was still under negotiation when this edition closed (Section 6).

Check before you accept.

- Your right to work: a visa unless you are British, Irish or hold settled status.
- A DBS check for work with under-18s.
- The hourly rate against £12.71, and whether preparation time is paid.

Not found for this edition. UK student and week counts (shares only were read); any published summer-school pay.

SECTION 6

Right to work: who needs what

> **Who can teach in Europe without a visa?** A citizen of an EU member state can live and work in all 27 EU states, plus Iceland, Liechtenstein, Norway and Switzerland, with no work visa. Everyone else needs a national work or residence permit, normally arranged with an employer, and the rules are set by each country, not by the EU.

Your passport	Teaching in the EU	Teaching in the UK	Teaching in Ireland
Irish	No visa: EU free movement	No visa: Common Travel Area	Home country
Other EU or EEA, Swiss	No visa: free movement	Visa required since Brexit, unless already holding settled status	No visa: free movement
British	National permit required in each country	Home country	No visa: Common Travel Area
US, Canadian, Australian, South African and other non-EU	National permit required in each country	Visa required	Permit required

Summary of the general legal position (EU free movement; UK and Irish government guidance on the Common Travel Area). Not legal advice; confirm with the embassy or immigration service before relying on a row.

What changed at the border in 2026

12 Oct 2025
EU Entry/Exit System began its phased start
European Commission

10 Apr 2026
Entry/Exit System fully operational at Schengen external borders
European Commission

€20
ETIAS fee once the system starts; valid three years
European Commission

Not live
ETIAS at 19 November 2026; no applications are being taken
European Commission

- **The Entry/Exit System records every non-EU short stay.** Since 10 April 2026 a biometric record replaces the passport stamp. The limit of 90 days in any 180 for visa-free visitors is now counted by the system, not by a border officer reading stamps.
- **That ends teaching on a tourist entry.** Working without a permit was never lawful, but overstays and repeated border runs are now recorded automatically. A non-EU teacher needs the permit before the job.
- **ETIAS is not operating.** The Commission's page read for this edition still says it will start in the last quarter of 2026 and that the date will be announced several months ahead. Press reports during 2026 point to a start in 2027. It is a travel authorisation for visa-free visitors, not a work permit, and it changes nothing about the right to work.

For non-EU teachers: what the official pages say

- **Assistant schemes carry their own permit.** The British Council, TAPIF and NALCAP place assistants with the paperwork for the placement, and only for it. In Germany the residence permit does not allow official secondary employment (British Council).
- **Costs are small but real.** The British Council lists residency permit costs on arrival in Belgium of €20 to €30; TAPIF charges a US$149 application fee.
- **Everything else is national.** Student, freelance, working-holiday and sponsored-employee routes differ in every country. This report does not summarise them, because no single official source does and provider summaries date quickly.

The practical point. For an EU or Irish citizen, the right to work is settled and the decision is about pay, prices and season. For everyone else, the right to work is the decision, and the assistant schemes are the only route in this report with published terms.

SECTION 6

The UK and the EU: what is open, what is being negotiated

> **Can British teachers still work in the EU?** Yes, with a national permit in each country, and through the British Council's assistant scheme without arranging one themselves. A reciprocal UK–EU Youth Experience Scheme was agreed in principle in May 2025 but had not been concluded when this edition closed on 19 November 2026. A UK–EU summit was scheduled for 20 November 2026.

Route	Status at 19 November 2026	Source
British Council English Language Assistants	Open annually; 2027–28 details published for nine destinations, seven in Europe	British Council
UK–EU Youth Experience Scheme	Agreed in principle, May 2025. No final agreement, age range, cap, fee or start date published. The UK government states any scheme will be capped, time-limited and subject to a visa.	UK Parliament written answers; press reports
UK Graduate Route	Shortens to 18 months from January 2027	UK policy, compiled March 2026
Common Travel Area	British and Irish citizens may live and work in each other's country	UK and Irish government guidance
Erasmus+	UK association reported as agreed; not read at source for this edition	Press reports

What is reported about the Youth Experience Scheme, and how firmly

- **Firm:** both sides have said they are working towards a scheme, and the UK has said it will be capped and time-limited.
- **Reported, not confirmed:** a UK proposal for a cap in the tens of thousands; a cross-party UK commission's recommendation of an initial 44,000; some member states seeking a much higher cap or none; a possible deferral of the deadline beyond the November summit.
- **Unknown:** the age range, the length of stay, the fee, whether teaching work is treated differently from any other work, and the date applications open.

Dated warning. This page was written the day before the summit. If an agreement is announced, the table above is out of date; the Institute's editorial standards page will carry the correction, and the web version of this report will be updated first.

What it would change for teachers

If the scheme is agreed on the terms reported, a British teacher under the age limit could take an academy job in Spain or Italy for a fixed period without an employer-sponsored permit, and an EU teacher could work a UK summer school season the same way. That would reopen the private academy market that has been closed to most British teachers since 2021, and would matter more to the countries without an assistant scheme: Portugal, Czechia, Poland, Hungary and Greece. None of this is in force, and no teacher should plan on it until a start date is published.

What does not change

- The assistant schemes, which have their own permits and their own timetable.
- The right of Irish citizens to work across the EU and in the UK.
- The Entry/Exit System, which applies to British visitors as to any other non-EU national.

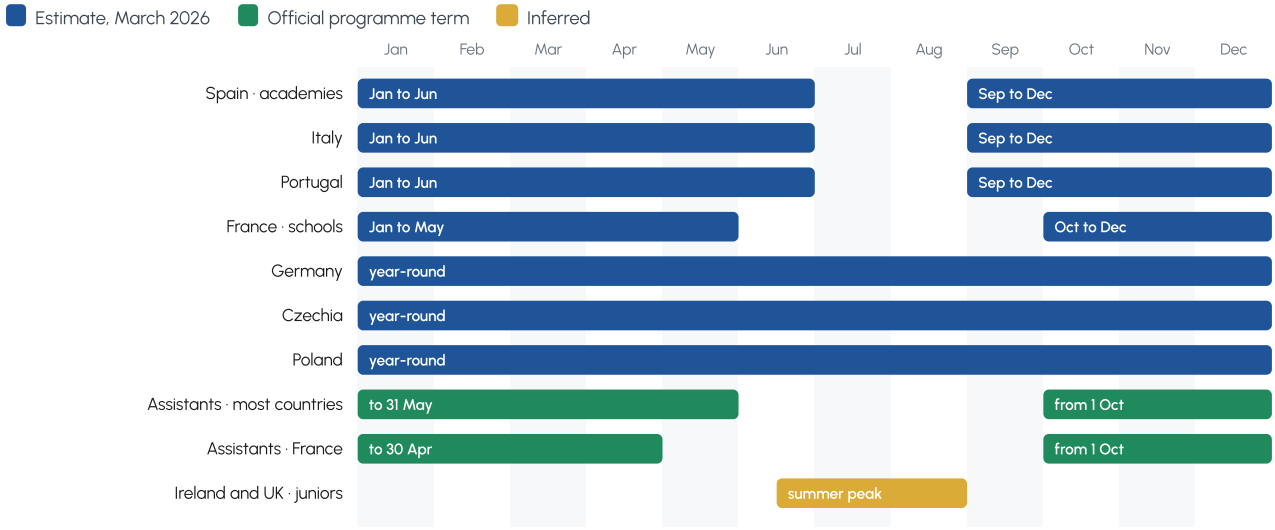
SECTION 7

The hiring calendar

When is the work? Southern European academies teach from September to June. The assistant schemes run from October or November to April, May or June. Germany, Czechia and Poland recruit year-round. Summer is the season in Ireland and the UK, when visiting juniors arrive and the rest of Europe's academies are closed.

Teaching seasons across the calendar year

Blue: season from the March 2026 compilation. Green: official programme terms. Amber: summer peak inferred from the junior share of students.



Sources: March 2026 compilation (estimates, not re-verified); British Council 2027–28 (official); EnglishUK and English Education Ireland junior shares (the summer peak is this report's inference, not a published season).

Working back from a start date

If you want to start	Apply or act	Why
As an assistant in October 2027	British Council applications for 2027–28 open in autumn 2026 and have closed in late January in recent years; TAPIF is open to 15 February 2027	Assistant schemes recruit eight to twelve months ahead
In a southern European academy in September	Spring and early summer	Schools fill their timetables before they close for August
Mid-year, from January	Autumn	Germany, Czechia and Poland recruit year-round; southern academies replace leavers in January but hire fewer
In a UK or Irish summer school	Early in the year	Vetting (DBS or Garda) is issued in advance and takes time

What the calendar changes

- **A full year in Europe is two contracts.** No scheme and no southern academy covers July and August. The teachers who stay employed twelve months combine a school year on the continent with a summer in Ireland or the UK, or teach online.
- **The assistant year is shorter than it looks.** Seven or eight paid months at €850 to €1,670 is an annual income of roughly €6,800 to €13,400 (derived: allowance multiplied by placement length; France and Italy at the low end, Austria at the high end).
- **Late applicants have three countries.** Germany, Czechia and Poland are the year-round markets in the data, and two of them have the lowest prices profiled.

Basis. British Council closing dates are described from previous years' published timetables and should be checked on the programme page. Seasons for Hungary, Greece and the Netherlands were not compiled.

SECTION 8

Qualifications employers can verify

Which TEFL qualification can a European employer check? A regulated one. A qualification on the Ofqual Register of Regulated Qualifications carries a number that any employer can search. Regulated Qualifications Framework Level 5 is referenced to Level 5 of the European Qualifications Framework, the framework used by the 27 EU member states.

CANONICAL DATA BLOCK · REGULATED QUALIFICATION REFERENCES

Qualification	Number	Level	Guided learning	Total qualification time	Awarding organisation
Level 5 Diploma in TEFL	610/1571/4	RQF Level 5	180 hours	382 hours	Highfield Qualifications, RN5219
Level 5 Advanced Diploma in TEFL	610/1573/8	RQF Level 5	300 hours	542 hours	Highfield Qualifications, RN5219

Confirmed by hand against the Ofqual Register of Regulated Qualifications on 1 September 2026 for the global edition. The two diplomas are separate specifications and are not to be combined.

Where Level 5 sits

The Regulated Qualifications Framework (England) and the European Qualifications Framework both run from Level 1 to Level 8.

Level 1	Level 2	Level 3	Level 4	**Level 5**	Level 6	Level 7	Level 8

RQF Level 5 is referenced to EQF Level 5. A framework level describes the demand of a qualification; it is not a statement that any employer or country recognises it.

What European employers ask for

Applicant	TEFL hours usually asked	Degree	Background check	Other
EU or Irish citizen	120	Not usually required	Yes: Garda vetting in Ireland, DBS in the UK, national equivalents elsewhere	Citizenship gives the right to work
Non-EU citizen	120	Usually required for a work permit	Yes	Employer sponsorship or a scheme placement
Language assistant	None stated by the schemes	Varies by scheme	Yes; the British Council requires a child protection certificate	A2 or B1 in the host language in five EU countries

Requirements rows 1 and 2 compiled March 2026 from provider and recruiter guidance for the global edition; not official rules. Row 3 from the British Council, read 19 November 2026.

Why verification matters more in Europe

- **There is no visa to do the checking.** In East Asia and the Gulf, the work visa sets the minimum qualifications. For an EU citizen in the EU nothing does, so the school decides, and a qualification it can look up on a public register carries more weight than one it must take on trust.
- **The learners are advanced.** In countries scoring 590 to 624 on the EF index, classes are B2 and above. Employers look for evidence that a teacher can handle exam preparation and professional English.
- **The host language is the second credential.** Six of the seven European assistant destinations ask for A1 to B1 in the local language.

What is not claimed. The global edition withdrew the statement that Level 5 is "recognised across 39 countries", because no source supports it as a claim about employers. This edition makes no claim about recognition in any European country. It states what can be verified: the register entry, the hours and the framework level.

SECTION 9

Online teaching and AI

Does online teaching change the European picture? It changes where the teacher lives, not where the learner is. Online learning was 48% of the global English language training market by method in 2024 (Market.us), and digital English language learning is forecast to grow about 15.8% a year to 2030, roughly twice the rate of the whole market. Neither figure is published for Europe on its own.

48%
Online share of ELT by method, worldwide, 2024
Market.us

15.8%
Implied annual growth, digital English learning, 2025–2030
Derived from Research and Markets

7.3%
Annual growth, whole ELT market, 2025–2034
Market.us

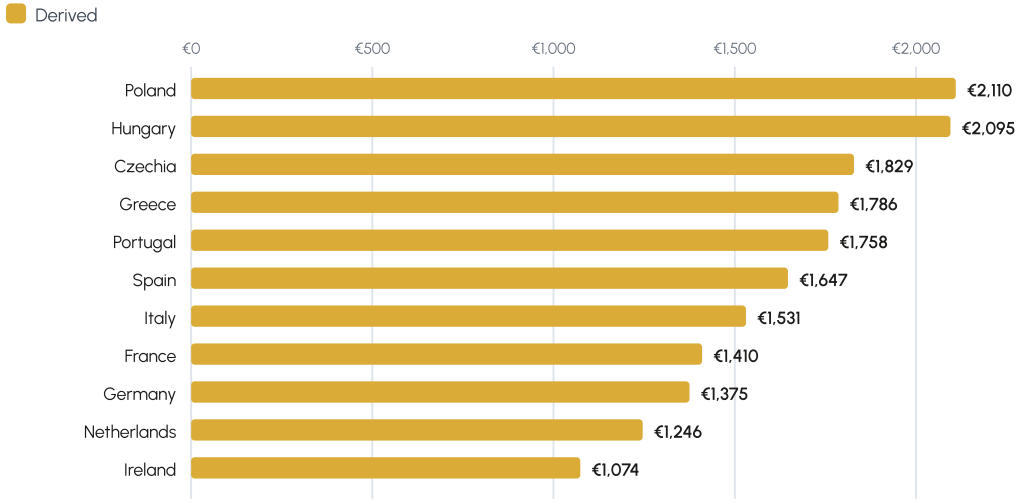
Not published
Any of these figures for Europe alone
No source found

Why Europe suits a teacher who works online

- **Free movement is also the right to live.** An EU or Irish citizen teaching online can base themselves in any member state. The price levels in Section 4 then matter more than local pay: the same online income buys almost twice as much in Poland or Hungary (71) as in Ireland (140).
- **The time zone fits two markets.** Central European time allows morning lessons with East Asia and evening lessons with European adults. This is a practical observation, not a measured one.
- **The summer gap has an answer.** July and August, when no scheme or southern academy pays, are the months an online timetable can fill.

One online income, eleven price levels

What €1,500 a month buys at EU-average prices in each country. Derived by this report from Eurostat's 2025 price levels.



Derived: €1,500 ÷ price level (Eurostat 2025, via Euronews). €1,500 is an illustration, not an estimate of online earnings. National averages; tax and rent are not modelled.

AI in the European classroom

The evidence is the same as in the global edition and no stronger for Europe. A 2025 peer-reviewed study found that combining ChatGPT with teacher feedback improved EFL learners' argumentative writing, and that the teacher's feedback made the difference. The tools in use are assistants for planning, first-pass correction and pronunciation practice.

- **What Europe adds is the speaking gap.** The EF data in Section 3 shows reading far ahead of speaking in the strongest countries. Tools give feedback on written English readily; live spoken interaction is what learners lack and what a teacher supplies.
- **No usage rate is quoted.** No figure with a stated method was found for how many European teachers or learners use these tools.
- **No effect on jobs is claimed.** Nothing read for this edition measures whether AI tools have changed the number of teaching posts in Europe.

Tax and residence. Living in one country while teaching learners in others raises tax and social insurance questions that differ by member state. This report does not cover them and no figure here accounts for them.

SECTION 10

What to watch in 2027

What will change for teachers in Europe in 2027? Five things have dates or decisions attached: the UK–EU Youth Experience Scheme, the start of ETIAS, the shortening of the UK Graduate Route, the next round of minimum wage rises on 1 January, and the next call for Spain's NALCAP. None of them is a forecast; each is a published date or an open decision.

Date	What	Status	Who it affects
20 November 2026	UK–EU summit	Scheduled; Youth Experience Scheme under negotiation	British teachers in the EU; EU teachers in the UK
1 January 2027	National minimum wages reset in most EU countries	Annual; Eurostat publishes the new figures at the end of January	Anyone testing a full-time offer against the floor
January 2027	UK Graduate Route shortens to 18 months	UK policy, compiled March 2026	International graduates teaching in the UK
15 February 2027	TAPIF applications close	As published 17 October 2026	US applicants for France, 2027–28
Not published	ETIAS start	Commission page: last quarter of 2026; press reports point to 2027	Visa-free visitors to the Schengen area, including British and US citizens
Not published	NALCAP next call	Last call 2 to 30 June 2026	North American applicants for Spain
1 October 2027	Most British Council placements begin	Published for 2027–28	UK applicants for six EU countries

Seven checks before you accept an offer in Europe

#	Check	Where in this report
1	Is the pay official or an estimate? Only the assistant schemes publish a figure.	Section 4, assistant schemes
2	How many hours is it for? An assistant allowance is for 12 to 16 hours; a monthly figure without hours cannot be compared.	Section 4, data block
3	Is a full-time offer at or above the legal minimum wage, gross?	Section 4, the legal floor
4	What does it buy locally? Compare the price level, then find the rent for the city.	Section 4, price levels
5	Do you have the right to work, or does the offer come with a permit?	Section 6
6	Is the start date inside the season? Nothing in southern Europe runs in July or August.	Section 7
7	Can the employer verify your qualification on a public register?	Section 8

Three things this report expects to be asked and cannot answer

- **How many English teachers work in Europe?** No count was found. State school teachers are counted by national ministries; private academy teachers and freelancers are not counted by anyone.
- **What does a private academy really pay?** Only listings data exists, and Section 4 shows it does not describe full-time employment at the legal minimum in most countries.
- **Is the market growing?** School coverage is at its ceiling and study travel is below 2019 across the eight destinations. The global forecasts are for the whole world and are not split for Europe.

Next edition. Gaps recorded for follow-up: pay and season data for Hungary, Greece and the Netherlands; Malta's study-travel figures; UK student and week counts; the outcome of the Youth Experience Scheme talks.

SECTION 11

Methodology

This edition was compiled by the Research Team at The TEFL Institute. It is the Europe edition of The State of TEFL 2027 and uses the same three-part basis as the global edition: official, market estimate, and survey or derived. Every figure is marked with one of them.

What was read for this edition, on 19 November 2026

Dataset	Read from	Primary or secondary
British Council English Language Assistants: allowances, hours, dates and language requirements for 2027–28	The British Council's own page	Primary
Eurostat national minimum wages, 1 January 2026	Eurostat release of 30 January 2026; EURES, 5 March 2026	Primary
Eurostat minimum wages, 1 July 2026 (four countries)	Euronews, 4 August 2026	Secondary
Eurostat price levels, 2025	Euronews, 25 June 2026	Secondary
Eurostat foreign language learning statistics, 2023	Eurostat, Statistics Explained	Primary
Special Eurobarometer, Europeans and their languages	European Commission press release, 21 May 2024	Primary
EF English Proficiency Index 2025: European scores, ranks and skill scores	GermanPedia tabulation, 1 September 2026; Euronews, 4 December 2025; EF launch release	Secondary, top four checked against primary
UK National Living Wage from 1 April 2026	UK government press release and Low Pay Commission report	Primary
EU Entry/Exit System and ETIAS status	European Commission, Migration and Home Affairs	Primary; press reports for the reported delay
UK–EU Youth Experience Scheme	UK Parliament written answers; press reports	Mixed; labelled where unconfirmed

What was carried forward from the global edition

TAPIF and NALCAP pay and windows (verified 17 October 2026); the Ofqual register references (confirmed by hand 1 September 2026); Market.us market figures (checked 1 November 2026); EnglishUK and English Education Ireland study-travel figures (read 12 November 2026); and the March 2026 compilation of pay, cost-of-living, season and requirement estimates, which has not been re-verified and is labelled as an estimate wherever it appears.

Derived figures

- The price-adjusted minimum wage (minimum wage divided by price level).
- The reading-to-speaking gaps in the EF skill scores.
- What €1,500 buys at each country's price level.
- The annual value of an assistant placement (allowance multiplied by months).
- Adults as 43% of Irish enrolments (100% less the 57% junior share) and Italy as about 38% of students in Ireland.
- Each is arithmetic on published figures, labelled as derived, and should be recomputed from the sources before being quoted as a statistic.

Limits

- **Secondary sources.** Three datasets were read through named secondary reports, not the publisher's own tables. They are identified in the table above and on each chart.
- **Twelve countries, not Europe.** The profiles cover twelve countries chosen for teaching volume and data availability. Turkey, covered in the global edition, is not profiled here. The Nordic and Baltic states, Austria, Belgium and the Balkans appear only where a dataset includes them.
- **No original survey.** No figure comes from a survey by the Institute or from the Institute's own customer data.
- **Uneven evidence.** Official data is strong on schools, wages and prices and absent on private-sector teaching pay. The report says where each gap is.

Corrections. No figure in this edition corrects the global edition. Later corrections will be recorded on the Institute's editorial standards page, and the web version of this report is the version of record.

SECTION 12

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About The TEFL Institute

The TEFL Institute (teflinstitute.com) is a TEFL course provider. Its Level 5 Diploma in TEFL and Level 5 Advanced Diploma in TEFL are regulated qualifications awarded by Highfield Qualifications and listed on the Ofqual Register of Regulated Qualifications. The Institute publishes The Hire Wire, a fortnightly report on TEFL hiring, and The State of TEFL, its annual market report, of which this is the Europe edition.

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