

Bernd Wächter, Friedhelm Maiworm

English-Taught Programmes in European Higher Education

The Picture in 2007

ACA Papers on
International Cooperation in Education

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Preface

This is the second time that the Academic Cooperation Association (ACA) devotes a large-scale study to the phenomenon of English-medium higher education in Europe. Compared to the first study of 2002, the present one covers a larger number of countries and is thus more ambitious and more comprehensive. It demonstrates that English-taught programmes are becoming more numerous almost by the day. In a number of countries of Europe, they have now become a standard feature of the higher education landscape. English-taught programmes have also 'come of age': they are regarded as a much less exotic phenomenon than they were five years ago, and the heated controversy which raged about them half a decade ago has calmed down considerably.

Many have contributed to the rich findings of this book. To all of them, the authors owe thanks. A wide range of experts from all over Europe, most of them on the Advisory Board of the project which led to this study, advised the authors on the methodological approach and helped them to contextualize and better understand the empirical findings obtained in the course of large-scale surveys. These experts were: Bernadette Allaert (Brussels), Lars Ove Breivik (Bergen), Robert Coenen (Leiden), Marta Fischer (Budapest), Dirk Haaksman (Den Haag), Marius Hartmann (Copenhagen), Jette Kirstein (Copenhagen), Esko Koponen (Helsinki), Jaanaliissa Kuoppa (Helsinki), Christian Müller (Bonn), Neza Pajnic (Ljubljana), Costas Papaspyrides (Athens), Soehirman Patmo (Den Haag), Jean-Kely Paulhan (Paris), Alberts Prikulis (Riga), Silvia Schmid (Bonn), Olga Subenikova (Bratislava), Ondrej Svaton (Prague), Gunta Takere (Tallinn), Rait Toompere (Tallinn), Louise Watts (Paris), Ireneusz Zbicinski (Lodz), Johanna Ziberi (Bern) and Karla Zimanova (Bratislava). In addition, the network of ACA member organisations was very helpful in encouraging their countries' higher education institutions to participate in the surveys undertaken as part of this study. Chripa Kizhakeparampil, Policy Officer at ACA, has given many valuable pieces of advice, which have improved this study.

But first and foremost, it is Europe's universities and colleges that the authors are deeply indebted to. Without their willingness to provide information and data on their English-medium programmes, this study would never have seen the light of day.

Bernd Wächter
Brussels
January 2008

1 Executive summary

The present study was prepared between November 2006 and January 2008 by the Academic Cooperation Association (ACA), in collaboration with the Gesellschaft für Empirische Studien (GES). The authors, Bernd Wächter (ACA) and Friedhelm Maiworm (GES), were supported by Chripa Kizhakeparampil (ACA). The study was made possible by a grant from the Socrates Programme (Accompanying Measures) of the European Commission's Directorate General for Education and Culture.

Background, objectives and definitions (Chapter 2)

The present study is a sequel to the book *English-Language-Taught Degree Programmes in European Higher Education*¹, which the same authors published in September 2002. This earlier study was the first attempt to create a systematic body of knowledge on programmes taught in English in non-English-speaking countries in Europe, i.e. in countries where English was not the domestic language. Its results were based on two large-scale surveys of almost 1,600 higher education institutions in 19 European countries. The study helped to inform and turn more rational a very heated debate on the issue of English-medium higher education provision in non-English-speaking countries, which raged at the time, and in which all discussants lacked any hard facts.

The present study pursues the same aim as its predecessor: to create transparency about the main quantitative and qualitative aspects of English-taught programmes in Europe. In terms of country coverage, "Europe" translates into a total of 27 countries, made up of (a) all member states of the European Union, with the exception of the United Kingdom, Ireland and Malta (where English is the/a domestic language) and Luxembourg, which was at the time of the surveys only starting to develop higher education programmes of the academic level required; (b) the countries belonging to the European Free Trade Association (EFTA), with the exception of Liechtenstein, which was excluded for reasons similar to those applying to Luxembourg; and (c) Turkey.

In order for higher education offers to be eligible as "English-taught programmes", programmes have to satisfy a number of requirements. First, they must be taught entirely in English, i.e. programmes taught in a mix of English and the domestic (or any other) language do not qualify, which was not the case in the predecessor study. Second, the study covers only Bachelor and Master programmes (in the definition of the Bologna Process), and excludes 'short' first-cycle programmes, as well as PhD programmes. Third, pro-

1 Friedhelm Maiworm, Bernd Wächter, *English-Language-Taught Degree Programmes in European Higher Education. Trends and Success Factors*, ACA Papers on International Cooperation in Education, Bonn: Lemmens 2002.

grammes in which English is (part of) the object of study, such as English Language and Literature, or American Studies, are also excluded. Fourth, the surveys targeted only 'recognised' higher education institutions. The criterion for 'recognition' is that the institution had been nominated by the country's competent authorities as eligible to participate in the European Union's Erasmus Programme.

The data and information used in the present study were collected by means of two large-scale surveys (both carried out in the course of 2007). First, a questionnaire survey addressed at the "Erasmus Institutional Contract Coordinators" of the 2,218 higher education institutions mentioned above (Institutional Survey). Second, a questionnaire survey targeting the "Programme Directors" of each English-taught programme identified by means of the Institutional Survey (Programme Survey). In three countries, the information obtained through the Institutional Survey was complemented by a search of national databases.

A team of experts from across Europe advised the authors on the methodological approach and the interpretation of the information obtained in the course of the surveys.

Volumes and country distribution (Chapter 3)

Programmes taught in English have become a much more common feature of European higher education than they were in 2002. But they are still not a mass phenomenon. The present study identified almost 2,400 English-medium programmes, compared to slightly over 700 in 2002. Even when allowing for differences in the approach and coverage of the two studies, it can safely be concluded that the provision of English-taught programmes has at least tripled since 2002. Amongst the institutions responding to the surveys, almost every second one offers at least one such programme. The Europe-wide share of English-taught programmes of all programmes (in the domestic language, in English or in any other language) is about seven percent amongst responding institutions, and about two percent across all institutions (assuming none of the non-respondents offers any programmes in English). The European average percentage of students enrolled in English-medium programmes in the institutions participating in the survey is about two percent (and less than one percent assuming that non-responding institutions do not offer any such programmes).

English-medium provision is very unevenly spread across Europe. By and large, the offer is concentrated in the countries in the north-eastern part of the continent. The conclusion of the 2002 study that the Alps constitute a 'watershed' for English-taught programmes still applies. The phenomenon is very rare in southern Europe. In absolute terms (number of programmes), the leading provider country is the Netherlands, with 774 programmes, followed at a considerable distance by Germany (415), Finland (235) and

Sweden (123). In relative terms (taking into account the different sizes of higher education systems), the Netherlands are the leading provider country, followed by Finland and Cyprus. Since 2002, the Netherlands and Finland have swapped places. Cyprus was not part of the 2002 surveys.

Institutional context (Chapter 4)

What is the profile of a higher education institution most likely to offer English-medium programmes?

First, higher education institutions which offer advanced degrees provide English-medium programmes much more frequently than others. 56 percent of PhD-awarding institutions offer English-medium education, compared to only 27 percent of institutions whose most advanced degree is a Bachelor, and 46 percent of those who award degrees up to the Master level.

Second, there is an obvious link between the provision of English-taught programmes and the size of an institution in terms of student enrolment. The larger the institution, the more likely it is to offer English-medium education. 62 percent of all institutions with more than 10,000 students provide this kind of education, but only 26 percent of very small ones with up to 500 students.

Third, there is a strong correlation between the provision of programmes taught in English and a wide range of subject areas on offer by an institution. 55 percent of all higher education institutions with a comprehensive range of subject areas provide English-medium education. This percentage drops in line with the degree of subject specialisation of the institution.

Fourth, and taking into account the above, the typical English-taught-programme-offering institution is a large, multi-disciplinary, PhD-awarding institution. This is not surprising at all, since universities with the right to award PhD degrees and a full spectrum of academic disciplines are larger than small Bachelor-type and specialised institutions.

Fifth, the relationship between a large enrolment of international students at an institution and the existence of programmes taught in English is less clear-cut. The percentage of institutions providing English-medium education rises from 35 percent with an international enrolment of below one percent, to 62 percent of institutions with between 10 and 20 percent of international students – only to fall again to the European average of 48 percent at institutions with an international enrolment of over 20 percent. This is probably explained by the fact that institutions in some countries with less-often spoken languages – and a lower international enrolment as a consequence – very often use English-medium education as a counter-steering strategy.

The findings on the institutional profile of the typical providers of English-taught programmes are very much in line with those of the 2002 predecessor study.

Characteristics of English-taught programmes (Chapter 5)

Across Europe, the subject area in which English-taught programmes are most frequently offered is engineering (27 percent), followed by business and management studies (24%), and the social sciences (21%). Together, these three subject areas make up 72 percent of all programmes on offer. The subject area distribution has changed since 2002, when provision in business and management led the second-ranked subject area, engineering, by more than double, and when the social sciences were only in fourth place.

English-medium education is very predominantly offered at the Master level, with a share of almost four fifths of all programmes. In some countries (Sweden, Belgium, Switzerland and Germany), the postgraduate share even exceeds 90 percent. Since 2002, when the postgraduate share stood at 68 percent, the trend towards the second cycle has thus been further strengthened. Bachelor programmes require on average 3.4 years of study and Master degree studies usually take 1.7 years. The duration of programmes has only very marginally changed since 2002.

The vast majority of programmes require, as a condition for admission, a Bachelor degree for access to a Master programme and an upper secondary school leaving certificate, such as a *baccalauréat* or a *Matura*, for access to a Bachelor programme. Next to these standard demands, most programmes have special requirements. The most common one is a test of sufficient proficiency in English, such as the TOEFL or IELTS, which 86 percent of programmes require. 30 percent of programmes make students sit entrance exams.

The 2002 study characterised English-medium education as “a very young phenomenon”. This still holds true today. The majority of programmes (51%) was set up in the last four years; more than a quarter were even created in the past two years. Master-level programmes are even younger than Bachelors. Only about a fifth of all programmes were established before the year 2000.

English-taught programmes are not only taught in a foreign language, they are also characterised by other features typical of modern and international curricula. 96 percent of all programmes have an ‘international dimension’ of some sort. 62 percent of programmes provide language training (in English, the domestic language, or both). Almost every programme (85%) issues, next to the national diploma, the ‘Diploma Supplement’. A mandatory study-abroad phase is a part of only 16 percent of all programmes – but then, most students in English-medium education are already ‘abroad’ anyway.

More than two thirds (70%) of all programmes charge tuition fees, a share considerably higher than in 2002. Only Europe’s north (Finland, Sweden, Norway) is still almost ‘fee-free’. Fee levels vary greatly. On a European average, the annual fee for domestic students is about EUR 3,400 and the one

for non-EU/EEA international students is EUR 6,300. Amongst those participating in the surveys, Danish programmes were most expensive, at 11,000 Euros on average. The least expensive programme in Europe charges the largely symbolical amount of EUR 150; the most expensive one costs EUR 26,000 per year.

Students enrolled in English-medium education are predominantly foreigners in their country of study. Their share stands at 65 percent, up from 60 percent in 2002. Domestic students, whose overall share is 35 percent, tend to be concentrated in Bachelor programmes, where they make up more than half (53%) of all students. Amongst non-domestic students, the largest group is made up of Europeans (36%), followed by Asians (34%) and Africans (12%). There have not been any dramatic changes in the origins of international students since 2002: the share of Europeans and Africans has slightly dropped, and that of Asians slightly risen.

Introduction and operation of English-taught programmes (Chapter 6)

Why do Europe's universities and colleges offer English-medium education? Which objectives are they pursuing with these offers? Out of a list of nine reasons, Institutional Coordinators and Programme Directors most often mentioned the motive "to attract foreign students" (84% and 81%). "To make domestic students 'fit' for the global/international labour market" was the second most frequent reason overall (84% and 75%) and the number one reason in the case of Bachelor programmes (in which domestic students are in the majority). The objective to "sharpen the profile of the institution" came out number three (52% and 55%), followed by the development-related aim of "providing high-level education for third-world students" (47% and 45%). Interestingly, a lack of domestic enrolments was rarely stated as a motive to set up English-medium programmes.

The introduction of English-taught programmes is about equally strongly driven by actors at the central and the departmental/faculty level of institutions. Administrators (such as heads of international relations offices) and academic staff are also involved to similar degrees. The pattern differs only marginally from the 2002 study, when the faculties and departments were slightly more often the driving force.

One of the most palpable changes took place in the field of marketing, which had been found to be underdeveloped in 2002. About two thirds of programmes are now active in marketing to both domestic and international target audiences, as compared to 43 percent in 2002. The share of programmes with no marketing at all fell from 23 to 11 percent. The by far most often used marketing channel remains the internet (87%). In comparison to 2002, percentages values have risen with regard to every single instrument. Increases are particularly high in the use of printed promotion material (up to from 16% to 80%) and the participation in student fairs (22% to 62%).

Language problems play a relatively small role in English-taught programmes. As far as students are concerned, problems are most often identified with international students' command of the domestic language (39% among Institutional Coordinators and 16% among Programme Directors), which was already the most sensitive area in 2002. An insufficient English-language proficiency of international students follows at a considerable distance (16% and 13%). Strong English-language deficits of domestic students play hardly any role (9% and 4%). In comparison to the 2002 study, the percentage values for all three problem areas have gone down. The perceived degree of English-language problems of teachers is also low (14% and 2%).

Which other problems do Europe's colleges and universities encounter in the context of English-medium provision? In the large majority of institutions, problems are rather rare. The most frequently stated problem consists of late withdrawals of students who had been offered a place (26% and 31%), followed by a lack of interest (enrolments) on the domestic front (18% and 20%), and a lack of interest among foreign students (15% and 8%). The hierarchy of these problem areas was the same in 2002.

Accreditation is becoming a standard feature of English-medium education, with 70 percent of all programmes accredited by some body at the domestic or international level. Although accreditation is mainly sought from and accorded by national bodies (66%), a considerable minority reports foreign accreditation (16%). Coming to speak of the wider field of quality assurance, only one quarter of programmes are entirely 'abstentious'. Over a third of programmes (37%) are regularly assessed by teams of internal and external experts. 26 percent rely on internal experts only, and 12 percent use exclusively external peers.

English-taught provision seems to encourage European higher education institutions to improve in other areas, too. The above-mentioned increase in marketing activities is the most obvious example. This is mentioned as the most frequent 'spin-off' of English-medium programmes, together with improvements in the field of student services (both 72% of Programme Directors). The third most often stated improvement (62%) – more targeted recruitment of students – is obviously closely linked to marketing.

2 Objectives and methods

2.1 Background and aims

Like it or not, there is a global higher education market. In 2005, about 2.7 million tertiary students studied outside of their country of nationality. This figure is up from 1.8 million in 2000 and 600 000 in 1975.² This steep rise is fuelled by a number of factors, amongst them a lack of (quality) higher education provision in some emerging economies which makes students seek educational opportunities abroad, and the increasing efforts by a growing number of OECD-level economies to attract foreign students into their universities and colleges. In some countries, particularly those which charge foreign students substantial tuition fees, these efforts are driven by motives of revenue generation (and cross-subsidizing the cost of educating their own nationals). In others, 'brain gains' are the ultimate target, which, it is hoped, will provide the receiving countries with high-level human resources necessary to fuel their knowledge economies and give them a competitive edge over others.

As a result of the above, an at times fierce competition over international students has set in. Individual higher education institutions, but also whole countries (and, more recently, supranational entities such as the European Union), have begun to promote and market their higher education offers internationally, by means of promotional websites and other IT tools, higher education fairs, 'road shows' and media campaigns. Other ways of increasing attractiveness are novel educational offers. In this regard, the language of tuition plays a major role. As a rule, countries with internationally less-often-spoken languages are at a disadvantage in the competition over foreign students. The dominance of English-speaking countries as destinations for international students³ can – at least to a degree – be attributed to the competitive advantage of English as a language of instruction. This is one of the reasons why non-English-speaking countries started some years ago to offer tertiary programmes in English too, i.e. in a foreign language in their country. This way, they hoped to be more easily able to compete with English-speaking destination countries.

The fact that higher education institutions in non-English-speaking countries offer programmes in English led to a very controversial debate. Critics predicted the death of many a respectable language as an idiom of scientific expression. They claimed that such offers were incompatible with the 'national mission' of higher education systems to educate their own citizens. They

2 OECD, *Education at a Glance. OECD Indicators*, Paris: OECD, 2007, pp. 302-303.

3 Well over 40 percent of all international students worldwide are enrolled in the US, the UK, Australia and New Zealand alone. Cf. OECD, *Education at a Glance*, op.cit., p. 304.

were also convinced that teaching in a foreign language would, by necessity, lower the quality of education, sometimes to the point where professors unable to express themselves in English would ‘teach’ students incapable of understanding it. The heat of these discussions stood in remarkable contrast to the modest body of safe knowledge about English-medium instruction. Before 2002, there was no single comprehensive and systematic overview of the extent and nature of the phenomenon in European higher education.

What changed all of this was the publication *English-Language-Taught Degree Programmes in European Higher Education*, which the Academic Cooperation Association (ACA) published in early 2002. This study, which ACA had produced in collaboration with the Gesellschaft für Empirische Studien (GES) in Kassel, Germany, was based on two large-scale surveys of 1,558 universities and colleges in 19 European countries.⁴ The study identified a total of 725 programmes taught in English from among the 821 institutions which responded to the survey. These programmes made up between two and four percent of all programmes taught in those countries, and they enrolled between 0.2 and 0.5 percent of all students studying there. In other words: English-medium tuition was a marginal phenomenon. That went for any country in Europe, even though there were large differences between them – the offer was concentrated in the Nordic countries and in the Netherlands – and growth was fast.

In order to keep track of the development of English-taught programmes in Europe, ACA and GES repeated the exercise five years later. This time, a larger number of countries was included in the surveys, and the definition of English-taught programmes was slightly adapted, in the light of earlier experiences (for details, see below). The results of the surveys were not only used to produce the present publication, but also to create a searchable online database of English-medium programmes in Europe (ACA Database of Programmes Taught in English, to be accessed via: www.aca-secretariat.be), for the use of potential students looking for such education. But by and large, the design of the study remained the same, which makes it possible to compare the situation half a decade ago with that of today.

Like its predecessor, the present study attempts to give a detailed account of the scale as well as the nature of English-taught programmes in European higher education today. In doing so, it tries to answer, amongst others, the following questions:

- What is the overall volume of provision of English-taught programmes in Europe? Is it still, as it was in 2002, a quantitatively negligible phenomenon, or are we talking of substantially larger numbers? Which countries in

⁴ The – at the time – 15 member states of the European Union minus the UK, Ireland and Luxembourg, the four member states of EFTA minus Liechtenstein, and the – then – EU accession countries Czech Republic, Hungary, Poland and Slovakia.

Europe are the “leaders” in the provision of such programmes, and which are more or less “abstentious”? The answers to these questions are given in Chapter 3 of this study.

- Which are the characteristics of institutions providing this form of education? Are they predominantly large, research-oriented universities, or are they smaller, specialised colleges? Are comprehensive institutions (in terms of disciplinary coverage) more likely to provide English-medium education than their specialised counterparts? These issues are dealt with in Chapter 4.
- What are the characteristics of the programmes taught in English currently on offer in European higher education? Which subject areas are the most common ones? At which academic level is English-medium education predominantly offered, i.e. as Bachelor or Master degrees? What are the qualifications required of a student to be admitted to these programmes? Are they a young phenomenon? Are tuition fees charged, and are scholarships available? Which parts of the world do the students come from? These questions are addressed and answered in Chapter 5.

While the above-mentioned parts of the study are, by their very nature, largely descriptive, those parts which address issues of critical importance in the conception, introduction and operation of English-medium programmes are of a more qualitative nature. Chapter 6, which deals with these issues, covers the following topics and areas. Why do universities and colleges offer programmes taught in English at all? What are their aims and motives? Who are the persons most likely to support and promote the introduction of programmes taught in English, and who can be expected to be sceptical, or in outright opposition? Which efforts do European higher education institutions make to attract “customers” onto these programmes, i.e. how do they market their products, and are the marketing strategies successful? Do students and teachers avail of a satisfactory level of English, or are there serious problems of a linguistic sort? Is any training in the English language provided? Which role does the domestic language play, and does it create problems? Likewise, is the level of content-related knowledge and skills of students sufficient, and what do institutions do to assure this? Which financial means are available in Europe for the introduction and operation of English-medium programmes? How and to which extent are English-taught programmes accredited and quality-assured? Which intended, or surprising, spin-off effects have been created by English-medium programmes?

2.2 Definitions

Which exact types of tertiary programmes are included in this study, and which are not? There was a need for definition with regard to three main issues.

- (a) Geographical coverage: which countries constitute “Europe”, for the purposes of this study?

- (b) 'Eligible' higher education institutions: how exactly was the sample of institutions defined which was addressed in this study?
- (c) English-taught programmes: what are the exact requirements for a programme to qualify as 'English-taught'?

For the purposes of this study, "Europe" consists of the following countries:

1. The member states of the European Union, with the exception of the United Kingdom, Ireland and Malta, where English is the (or a) standard medium of instruction, and Luxembourg, which is only now starting to develop an offer of programmes at the academic level required (see below). These are 23 countries.
2. The countries belonging to the European Free Trade Association (EFTA), with the exception of Liechtenstein, where the situation is similar to that in Luxembourg. These are three countries.
3. Turkey.

In the above countries, any tertiary institution qualified for inclusion which had been awarded a so-called "ERASMUS Charter" in the Erasmus/Socrates Programme of the European Union in the academic year 2005/2006. There were pragmatic and substantive reasons for selecting this definition of 'eligibility'. First, and on a pragmatic level, the authors had access to the addresses of all institutions with an "Erasmus Charter", and thus a 'port of entry' into all of these institutions, which is of immense practical value for a large-scale survey. Second, and substantively, the institutions which may participate in the Erasmus Programme are nominated by their governments, and can thus be viewed as officially recognised. Moreover, the nomination by governments is inclusive, that is, it eliminates only non-recognised institutions, but does not otherwise constitute a 'selection'.⁵ The above definitions resulted in a sample of 2,218 higher education institutions in Europe, which form the basis of this study.

Three criteria were applied to define an "English-taught programme":

1. Programmes had to be either at Bachelor or Master level (or the equivalent of the latter). In accordance with the Bologna requirements, a Bachelor programme is defined as a first-cycle programme of at least three years' duration. A Master is defined either as a second-cycle programme requiring, as an admission condition, at least a Bachelor qualification, and lasting at least one academic year, or a single-cycle 'long' qualification, of a minimum duration of four years.
2. Programmes had to be taught 100 percent in English. This excluded 'mixed' programmes taught predominantly, but not entirely in English. The predecessor study had still included such 'mixed' programmes, which at the time accounted for 21 percent of all identified provision.

⁵ Since in some countries, such as France, the list of institutions eligible to participate in Erasmus also contains some which only offer programmes below the Bachelor level, these institutions were excluded whenever the authors could safely identify them.

3. Programmes in which English is (part of) the object of study were excluded. Thus, programmes in English language and literature or in American studies, to name but two examples, were not eligible as English-taught programmes.

It is important to note that the above definition does not include all 'tertiary' provision. It excludes a substantial number of short-duration offerings at sub-Bachelor level (ISCED level 5B), as well as doctoral programmes (ISCED level 6).

2.3 Methods

Next to a review of relevant literature, the perusal of official documentation and internet searches, the study was mainly conducted by means of two surveys. Both surveys were carried out on-line, and both used standardised (mainly) closed questionnaires. The first one, the Institutional Survey, addressed the Erasmus Institutional Coordinators of each higher education institution included in the study. The second one, the Programme Survey, was sent to the directors of each programme identified.

In the case of non-responding institutions from some countries (see below), the Institutional Survey was complemented by a search for additional English-taught programmes in national databases.

Institutional Survey

The Institutional Survey addressed 2,218 higher education institutions in the 27 countries included in the study. An Institutional Questionnaire was sent to the Erasmus Institutional Coordinators, with the prime purpose of identifying whether or not the respective institutions offered English-medium programmes, which these were, and who the Programme Director was. A second purpose of the Institutional Survey was to gather information on the institutional context, and to learn about the experiences gained in the introduction and operation of English-taught programmes at institutional level. The questionnaire contained predominantly closed questions. It was made available in English only.

The questionnaire was mailed out in January 2007. A first e-mail reminder letter was sent in the first week of March 2007, followed by a second reminder in the first week of April 2007. 851 Institutional Questionnaires were filled in and received back until mid-May 2007. The return rate was almost 38 percent (see Table 1 in Chapter 3.1).

Programme Survey

As a result of the Institutional Survey, more than 1,500 programmes were identified and used as the base pool for the second survey carried out in the framework of the study, i.e. the Programme Survey. All the persons respon-

sible for one or more programmes taught in English (Programme Directors) were informed about the project and the web address of the online Programme Survey via e-mail in the first week of May 2007. Non-responding Programme Directors were sent a reminder email in mid-June 2007. A second reminder was sent in the second half of August 2007.

Since the overall response rate to the Programme Survey remained somewhat below expectations, the research team took an additional step in countries where the existence of public sources allowed the identification of further programmes. This was the case in The Netherlands, Germany and Finland, where relatively comprehensive online databases of English-taught programmes exist. This way, additional programmes could be identified, which had not been reported in the course of the Institutional Survey. The additional programmes raised the overall number of identified programmes to 2,381. The coordinators/directors of those additional programmes were also asked to fill in the Programme Questionnaire, and, in case of non-response, were sent at least one reminder. In the end, a total of 852 programmes participated in the Programme Survey, which corresponds to a response rate of 36 percent.

The Programme Questionnaire served to collect detailed information on the characteristics of the programmes, as well as on their introduction and operation. Some information items were intended to be used solely for the presentation of the programmes in the *ACA/GES Database of Programmes Taught in English* (see above)⁶ and have thus not been used for the present study. Some information items were used to create the statistical basis for this book only. A third set of information and data was used for both the publication and the database.

In order to be better able to understand and interpret the data and information obtained through the above surveys and additional methods, the authors were supported by a group of experts – mostly from ACA member organisations – from all across Europe.

6 Accessible via the ACA website: www.aca-secretariat.be.

3 The volumes of English-taught programmes in individual European countries

The detailed results of this study will be presented in the following chapters. They provide a description of those institutions which offer programmes taught in English (Chapter 4), they describe the major characteristics of English-medium tuition (Chapter 5), and they deal with a number of thematic issues of major importance (Chapter 6). Before presenting these detailed findings, the authors found it useful to provide an overview of the main quantitative trends with regard to three questions. First, is English-medium education a sizeable phenomenon at all, or is it still, as it was in 2002, rather marginal? Second, which of the 27 European countries included in the study are the 'leaders' in the provision of such education, and which offer few or none of these programmes? Third, to what extent has the offer of programmes taught in English changed during the past five years? In order to draw a realistic picture of the relative importance and the country distribution of English-taught programmes, three particular questions needed to be answered.

- How many higher education institutions offer English-medium programmes, and what is their proportion of all higher education institutions addressed in the study?
- How many English-taught programmes are there, and what is their proportion of all programmes taught at the higher education institutions addressed in the study?
- How many students are enrolled in English-medium programmes, and what is their proportion of all higher education institutions addressed in the study?

The study had been designed in a way that the data necessary to answer these questions would become available through the Institutional Survey. However, a substantial number of institutions did either not return the Institutional Questionnaire at all, or did not answer all of the questions, such as the one on the overall number of students in their institution, or the one on the overall number of programmes. The result is an incomplete body of data, which obviously entails the risk of invalid conclusions. In order to limit this risk, the below 'safeguarding' measure was introduced.

For each of the three above questions, results were calculated on the basis of an 'optimistic scenario' (maximum score) and a 'pessimistic scenario' (minimum score).

- In the *optimistic scenario*, the results are calculated on the assumption that the institutions responding to the survey constitute a representative sample of all higher education institutions addressed, in terms of the overall number of programmes, of the number of English-taught programmes, and in respect of the overall number of students and of the number of students enrolled in English-medium education.

- In the *pessimistic scenario*, the results are calculated on the assumption that non-respondents do not offer any programmes taught in English.

There are indications that many non-responding universities and colleges do not offer English-medium education and that therefore the 'pessimistic scenario' could be the more realistic one. For example, many addressees of the Institutional Survey let the authors know they saw no point in filling in the questionnaire, since they offered no programmes in English. On the other hand, at least in the case of certain countries, such as the Netherlands, it is clear from other sources that a substantial proportion of institutions providing tuition in English did not participate in the survey, which would speak for the 'optimistic scenario'. Which of the two scenarios applies therefore probably varies by country.

3.1 Countries participating in the study

Readers are reminded that the study targeted a total of 27 European countries, i.e. (1) all European Union member states, except the United Kingdom, Ireland and Malta, where English is the (or a) standard language of instruction, and Luxembourg, which is only now starting to offer degree-level higher education, (2) the countries belonging to the European Free Trade Association (EFTA) with the exception of Liechtenstein, which is a case similar to that of Luxembourg, and (3) Turkey, which is in accession to the EU.

Each higher education institution in the countries taking part in the Erasmus programme (award of an "Erasmus Charter" in the year 2005/06) was included in the Institutional and Programme Survey.⁷ With the exception of very few and in most cases very small institutions, the sample of the surveys was the entire tertiary system of the above countries. The number of institutions addressed was 2,218.

As Table 1 shows, more than one third of the addressees in the sample (38.4%) filled in and returned the Institutional Questionnaire, which provides a solid basis for the analysis of most of the issues addressed in this study. However, return rates differ very much between countries. The classically highly responsive Norway and Finland head the table of respondents with 70 percent each, followed by Switzerland with 61 percent, and some of the smaller countries with fifty and more percent each: Cyprus, Estonia, Iceland, Slovakia, Sweden, Lithuania and Latvia. At the – non-responsive – bottom end are France (22%), Spain (23%) and Italy (30%), with modest response rates only. As will later be seen, the countries with a high response rate are mostly also those with a concentration of English-taught provision, so that the modest response from some countries does not negatively affect the overall results of the study.

⁷ In the case of France, a few institutions which clearly offered only sub-Bachelor-level education were eliminated from the list.

Table 1
Higher education institutions and programme directors addressed by the study, respondents and return rates – by country

Country	Higher education institutions			English-taught programmes		
	All institutions	Respondents	Return rate	All programmes	Respondents	Return rate
AT	82	36	43.9	23	10	43.5
BE	83	40	48.2	43	18	41.9
BG	40	17	42.5	36	1	2.8
CH	31	19	61.3	52	27	51.9
CY	14	8	57.1	10	6	60.0
CZ	51	25	49.0	41	11	26.8
DE	291	109	37.5	415	211	50.8
DK	106	37	34.9	96	45	46.9
EE	23	13	56.5	13	2	15.4
ES	84	19	22.6	18	5	27.8
FI	53	37	69.8	235	123	52.3
FR	417	90	21.6	79	26	32.9
GR	41	16	39.0	8	2	25.0
HU	52	21	40.4	49	7	14.3
IS	9	5	55.6	1	1	100.0
IT	142	42	29.6	35	6	17.1
LT	43	22	51.2	31	16	51.6
LV	26	13	50.0	12	3	25.0
NL	62	30	48.4	774	191	24.7
NO	47	33	70.2	53	26	49.1
PL	222	80	36.0	90	17	18.9
PT	96	41	42.7	9	2	22.2
RO	53	24	45.3	25	4	16.0
SE	39	21	53.8	123	61	49.6
SI	10	4	40.0	0	-	-
SK	22	12	54.5	24	4	16.7
TR	79	37	46.8	94	27	28.7
Total	2,218	851	38.4	2,389	852	35.7

Overall, 2,389 programmes taught in English could be identified. 1,894 of those were reported by higher education institutions taking part in the Institutional Survey⁸ and an additional number of 495 could be identified by other

⁸ This number refers to programmes which were, in the academic year 2006/07, either in operation (majority), or in the final phase of preparation (minority).

means (see Chapter 2). In terms of absolute numbers of programmes, the Netherlands are the uncontested leader, with 774 programmes. The so much larger Germany follows at a large distance (415). Other countries with an identified number of more than one hundred English-taught programmes are Finland (235) and Sweden (123).

Altogether 852 Programme Directors responded to the survey and provided detailed information on structure and content of the courses by filling in the Programme Questionnaire. The overall return rate was 35.7 percent – and thus on a similar level as that of the Institutional Survey. Again, addressees from most Nordic countries were highly responsive, with return rates of about 50 percent or more. Comparable rates are only reached in the cases of Germany, Switzerland, Cyprus and Lithuania (see Table 1). The fact that countries from the central and eastern parts of Europe figure at the bottom of the list could be an indication that the programmes reported by Institutional Erasmus Coordinators were not always considered by Programme Directors as compatible with the definition of English-taught programmes applied in this study, for example with the requirement that programmes had to be taught entirely in English.

3.2 Proportion of institutions providing English-taught programmes

401 of the 851 institutions responding to the survey (or about 47%) offer at least one programme taught in English. As already mentioned, however, there are some doubts if it is legitimate to extrapolate from the sample of responding institutions to the entirety of institutions addressed in the survey. Indeed, the assumption that this is not possible is supported by a number of non-responding institutions which informed the research team by email, fax or phone that they offer no English-taught programmes.

In order to provide a more realistic picture of the proportion of higher education institutions offering English-medium education, the figures calculated on the basis of respondents to the survey (maximum score, optimistic scenario) are contrasted with a calculation of the percentage of English-programme-providing institutions of all institutions addressed in the survey (minimum score, pessimistic scenario).

Overall, the proportion of institutions offering tuition in English lies between 18 percent in the 'pessimistic scenario' and 47 percent in the 'optimistic' version. The extent of the difference between the minimum and maximum estimates for individual countries, which is mainly a reflection of the return rate and the share of English-programme-providing institutions among the respondents, can be used as an indicator to assess the likely validity of the scores. The smaller the difference, the closer the estimates should be to reality. For most countries the difference is more than 20 percent, which indicates a rather high degree of uncertainty.

Table 2
Higher education institutions offering English-taught programmes (ETPs) – by country (absolute numbers and percentages)

Country	(1) Institutions addressed	(2) Institutions ¹⁾ responding	(3) Institutions offering ETPs	Percentage of institutions offering ETPs		
				A Minimum (3:1)	B Maximum (3:2)	Difference B - A
AT	82	36	12	14.6	33.3	18.7
BE	83	40	9	10.8	22.5	11.7
BG	40	17	6	15.0	35.3	20.3
CH	31	19	7	22.6	36.8	14.3
CY	14	8	7	50.0	87.5	37.5
CZ	51	25	15	29.4	60.0	30.6
DE	291	109	70	24.1	64.2	40.2
DK	106	37	17	16.0	45.9	29.9
EE	23	13	5	21.7	38.5	16.7
ES	84	19	7	8.3	36.8	28.5
FI	53	37	35	66.0	94.6	28.6
FR	417	90	33	7.9	36.7	28.8
GR	41	16	5	12.2	31.3	19.1
HU	52	21	11	21.2	52.4	31.2
IS	9	5	1	11.1	20.0	8.9
IT	142	42	12	8.5	28.6	20.1
LT	43	22	13	30.2	59.1	28.9
LV	26	13	5	19.2	38.5	19.2
NL	62	30	26	41.9	86.7	44.7
NO	47	33	15	31.9	45.5	13.5
PL	222	80	36	16.2	45.0	28.8
PT	96	41	4	4.2	9.8	5.6
RO	53	24	12	22.6	50.0	27.4
SE	39	21	12	30.8	57.1	26.4
SI	10	4	0	0.0	0.0	0.0
SK	22	12	9	40.9	75.0	34.1
TR	79	37	17	21.5	45.9	24.4
Total	2,218	851	401	18.1	47.1	29.0

1) A remarkable number of institutions (75) did not return the Institutional Questionnaire, but provided at least one of the programme questionnaires. For systematic reasons only institutions responding to the Institutional Survey are shown in the table.

Taking the minimum estimates ('pessimistic scenario') as the best approximation of reality, the table of countries with institutions offering English-taught programmes is topped by Finland (66%), followed by the Cyprus (50%), the Netherlands (42%), Slovakia (41%), Norway (32%) and Sweden (31%). The lowest providers of English-medium education are higher education institutions in France, and in the southern countries Italy, Portugal and Spain, with a percentage of under 10. Table 2 displays clearly that there is a 'north-south divide' (with the notable exception of Cyprus). Based on the "optimistic scenario", Finland again comes out top (95%), ahead of Cyprus (88%), the Netherlands (87%), Slovakia (75%) and Germany (64%). Once again, the southern countries except Cyprus come out low. By and large, the Alps are still a European 'English-medium watershed'. In most countries north of them, English-taught programmes are a relatively common feature, while those in the south seem to be almost 'English-free'. Most of countries in the centre and east of Europe occupy a middle position.

This result shows no very dramatic deviation from the 2002 study. There was, at the time, also a 'north-south rift'. Finland was likewise the leader, followed, however, by the Czech Republic and Iceland. Cyprus, now number three, was then not part of the survey.

3.3 Proportion of programmes provided in English

Although a total number of 2,389 programmes taught in English was identified, the data and statistical analysis in the further part of this chapter is only based on those 1,894 programmes which were reported in the course of the Institutional Survey. This approach had to be taken for only in the case of those 1,894 programmes comparative data on the number of all study programmes offered by individual higher education institutions (i.e. in the domestic language, in English or in a third language) were available.

Measured against the overall number of programmes the average proportion of English-medium programmes ranges between two and seven percent only (see Table 3). On the basis of the minimum estimate ('pessimistic scenario'), the highest proportion of programmes taught in English can be found in the Netherlands (17%), followed by Finland (14%) and (Denmark (7%). In the 'optimistic' version, the Netherlands again lead (34%), but Denmark (21%) moves ahead onto rank two, before Finland (15%). All southern countries are at the bottom of the list, with very low values.

3.4 Enrolment in English-taught programmes

The overall number of students in English-medium programmes reported by institutions is roughly 121,000 (academic year 2006/07). In relation to the number of students enrolled in all programmes, these students still form a small minority (see Table 4). In the 'optimistic scenario', their average proportion is 2.1 percent. In the 'pessimistic' version, the percentage is a meagre 0.7.

Table 3
Overall number of programmes and number of English-taught programmes – by country (absolute numbers and percentages)

Country	Number of programmes			Proportion of ETPs		
	(A) Estimated number of programmes ¹⁾	(B) Reported number of programmes ²⁾	(C) ETPs ³⁾	(D) Minimum % (C : A)	(E) Maximum % (C : B)	Difference % (E-D)
AT	1,300	916	23	1.8	2.5	0.7
BE	2,000	1,016	43	2.2	4.2	2.1
BG	2,400	526	36	1.5	6.8	5.3
CH	1,400	638	52	3.7	8.2	4.4
CY	400	171	10	2.5	5.8	3.3
CZ	2,100	688	41	2.0	6.0	4.0
DE	13,500	3,360	214	1.6	6.4	4.8
DK	1,300	467	96	7.4	20.6	13.2
EE	600	421	13	2.2	3.1	0.9
ES	4,500	906	18	0.4	2.0	1.6
FI	1,500	1,342	208	13.9	15.5	1.6
FR	14,500	2,360	79	0.5	3.3	2.8
GR	1,500	343	8	0.5	2.3	1.8
HU	3,000	806	47	1.6	5.8	4.3
IS	300	221	1	0.3	0.5	0.1
IT	8,000	2,134	35	0.4	1.6	1.2
LT	2,000	748	31	1.6	4.1	2.6
LV	700	280	12	1.7	4.3	2.6
NL	3,000	1,502	509	17.0	33.9	16.9
NO	2,100	1,196	53	2.5	4.4	1.9
PL	5,300	1,251	90	1.7	7.2	5.5
PT	2,500	744	9	0.4	1.2	0.8
RO	3,000	906	25	0.8	2.8	1.9
SE	3,000	1,070	123	4.1	11.5	7.4
SI	300	211	0	0.0	0.0	0.0
SK	2,000	1,386	24	1.2	1.7	0.5
TR	8,500	2,216	94	1.1	4.2	3.1
Total	90,700	27,825	1,894	2.1	6.8	4.7

1) The overall number of programmes per country was calculated on the basis of data collected with the help of the Institutional Questionnaire. The number of programmes in non-responding institutions was estimated by taking into account available data from other sources, i.e. the number of students enrolled, and the average size of programmes in individual countries calculated on the basis of data collected by the survey.

2) Data were collected with the help of the Institutional Questionnaire.

3) As reported in the Institutional Questionnaire. Note: This number does not include the additional 487 English-taught programmes that were identified at institutions/universities not responding to the Institutional Survey.

Table 4
Overall number of all students and of students enrolled in English-taught programmes in the academic year 2006/07 – by country (absolute numbers and percentages)

Country	Number of students			Proportion of ETP students		
	(A) Estimated total number ¹⁾	(B) Reported total number ²⁾	(C) ETP students ³⁾	(D) Minimum % (C : A)	(E) Maximum % (C : B)	(F) Difference %
AT	244,400	208,903	1,792	0.7	0.9	0.1
BE	389,500	159,296	1,409	0.4	0.9	0.5
BG	237,900	68,838	546	0.2	0.8	0.6
CH	199,700	92,786	2,414	1.2	2.6	1.4
CY	20,100	9,512	5,208	25.9	54.8	28.8
CZ	336,300	122,113	1,252	0.4	1.0	0.7
DE	2,268,700	713,677	9,461	0.4	1.3	0.9
DK	232,300	85,693	7,014	3.0	8.2	5.2
EE	67,800	44,558	647	1.0	1.5	0.5
ES	1,809,400	500,241	675	0.0	0.1	0.1
FI	306,000	249,682	8,118	2.7	3.3	0.6
FR	2,187,400	322,094	5,607	0.3	1.7	1.5
GR	646,600	158,572	860	0.1	0.5	0.4
HU	436,000	162,713	5,834	1.3	3.6	2.2
IS	15,200	11,648	20	0.1	0.2	0.0
IT	2,015,000	487,273	1,551	0.1	0.3	0.2
LT	195,400	86,972	1,789	0.9	2.1	1.1
LV	130,700	47,237	744	0.6	1.6	1.0
NL	565,000	358,311	30,040	5.3	8.4	3.1
NO	213,900	122,040	1,236	0.6	1.0	0.4
PL	2,118,100	610,783	6,007	0.3	1.0	0.7
PT	380,900	143,495	192	0.1	0.1	0.1
RO	738,800	238,375	2,698	0.4	1.1	0.8
SE	426,700	168,833	3,579	0.8	2.1	1.3
SI	112,200	74,602	0	0.0	0.0	0.0
SK	181,400	81,582	789	0.4	1.0	0.5
TR	2106,400	566,728	21,830	1.0	3.9	2.8
Total	18,581,800	5,896,557	121,312	0.7	2.1	1.4

1) Source: EUROSTAT student numbers for the year 2005.

2) The data were collected with the help of the Institutional Questionnaire.

3) The number of students in English-taught programmes in institutions which did not provide numbers was estimated on the basis of the median students of programme offering institutions in the respective country.

Class sizes vary very considerably between countries. On a European average, 64 students are enrolled in an English-taught programme. In Cyprus, where enrolment is highest, the average English-taught programme has 521 students (which should be part of the explanation for its surprisingly good performance on this indicator). Turkey also has huge class sizes, with an average of 232 students⁹. The only other countries with an average enrolment of over 100 are Hungary (124), Romania (108) and Greece (107).

Based on the figures of the 'pessimistic scenario', there are only a few countries with a share of students in English-taught programmes above one percent. With 26 percent, Cyprus leads, light years ahead of the Netherlands with five percent, and Denmark and Finland with three percent each. In other countries with a comparably elevated number of English-medium-programme students, such as Germany, Poland or Turkey, the respective proportion is close to the average.

3.5 Leading countries

In order to arrive at an overall (average) ranking of the individual countries as providers of English-medium tuition, the three indicators used above were transformed into one single value. This was calculated by making the sum of each country's rank for the three indicators of the pessimistic scenario (a. institutions offering English-medium education, b. programmes taught in English, and c. student enrolment in those programmes) and by dividing the sum by three. The overall ranking gives an indication which countries are the leaders in the provision of education provided in English, and which ones score very poorly.

The Netherlands, Finland and Cyprus, in that order, are the European leaders in the provision of education provided in English, followed by Sweden, Switzerland, Denmark and Norway. Countries such as Hungary and Germany form a middle group, while southern Europe very much lags behind. The good position of Cyprus is strongly influenced by the large student cohorts in its English-taught programmes. Students per programme far exceed those in most other countries, except for Turkey.

Excluding Cyprus, the overall ranking confirms the 2002 pattern of a 'north-south divide'. Finland and the Netherlands have swapped the top two places and Sweden has moved further to the top.

9 As will be seen later in Chapter 5, the Turkish enrolment consists almost entirely of Turkish nationals. This is very different in Cyprus.

Table 5
Ranks of individual countries by different criteria measuring the provision of programmes taught in English (ETPs)

Country	Institutions offering ETPs	Programmes taught in English	Enrolment of students in ETPs	Total	
	Rank	Rank	Rank	Mean value	Rank
NL	3	1	2	2.0	1
FI	1	2	4	2.3	2
CY	2	7	1	3.3	3
SE	6	4	10	6.7	4
CH	11	5	6	7.3	5
DK	17	3	3	7.7	6
NO	5	6	12	7.7	6
EE	12	8	8	9.3	8
LT	7	16	9	10.7	9
CZ	8	10	16	11.3	10
HU	14	15	5	11.3	10
SK	4	18	14	12.0	12
DE	9	14	15	12.7	13
TR	13	19	7	13.0	14
LV	15	12	13	13.3	15
AT	19	11	11	13.7	16
RO	10	20	17	15.7	17
PL	16	13	19	16.0	18
BE	22	9	18	16.3	19
BG	18	17	21	18.7	20
GR	20	22	22	21.3	21
FR	25	21	20	22.0	22
IS	21	26	23	23.3	23
IT	23	23	24	23.3	23
ES	24	24	26	24.7	25
PT	26	25	25	25.3	26
SI	27	27	27	27.0	27

3.6 Development during the past five years

How has the offer of English-taught programmes changed during the past five years? In order to provide a realistic answer, the comparison has to be limited to those 19 countries which were already included in the 2002 study, i.e. (1) all former EU-15 countries with the exception of the United Kingdom and Ireland, where English is the standard language of instruction, and Luxembourg, which did not offer degree-level higher education at the time, (2) the four countries belonging to the European Free Trade Association

(EFTA) with the exception of Liechtenstein, which is a case similar to that of Luxembourg, and (3) the Czech Republic, Hungary, Poland and Slovakia. It must further be borne in mind that the definition of programmes eligible to take part in the study changed between 2002 and 2007. In the 2002 study, programmes partly taught in English were included; in the present study, they are not. Given that over 20 percent of the programmes in 2002 offered at least some of their courses and lectures in the domestic language, the overall number of programmes in 2007 would certainly have been higher if this type of programmes had remained eligible in the present study.

In the period since the last study, a substantial growth in the number of English-taught programmes could be observed in Europe. About 700 programmes identified in 2002 compare with about 1,700 (in the countries included in both studies). Given that programmes only partly taught in English were excluded in the present study, it can safely be assumed that the number of English-medium programmes has tripled in the past five years.

What applies to absolute numbers is not equally true of percentages, however. The share of English-taught programmes of all programmes in 2002 ranged between two percent ('pessimistic scenario') and four percent ('optimistic scenario'). In the present study, the value for the 'pessimistic scenario' has hardly changed (2.3%). Only the value in the 'optimistic scenario' has markedly increased, to 7.5 percent. Viewed together with a three-fold rise in the number of English-medium programmes, that would seem to suggest that not only the numbers of English-medium programmes have risen, but also those of all courses. This could possibly be an effect of the degree structure reform of the Bologna Process, in which formerly one-cycle study programmes at the Master level have been divided into two separate study programmes, i.e. one leading to a Bachelor and a second leading to a Master degree.

The proportion of higher education institutions offering English-taught programmes has slightly increased. In the 2002 study, the figure for the 'pessimistic scenario' was 16 percent as compared to 17 percent in 2007, whereas for the 'optimistic' version it was 30 percent as compared to now 47 percent. There has thus been at least a modest growth in the proportion of institutions which offer English-taught programmes. Seen together with the far more substantial rise in the number of programmes, this would seem to suggest that a concentration process has taken place. Whereas in the earlier study, the average number of English-taught programmes available at the respective institutions was slightly under three ($725 : 246 = 2.9$), the average has now risen to five ($1,673 : 336 = 5.0$).

How has student enrolment developed in the last five years? Low as the numbers of students enrolled in English-medium programmes in the present study may still be, they are up considerably from 2002. In the earlier study, about 28,000 students were found to be enrolled in programmes delivered in

Table 6
Number of English-taught programmes (ETPs) and Indicators of Quantitative Importance – by country and by year of survey (absolute numbers and percentages)

Country	Number of ETPs reported by responding institutions		Indicators of quantitative importance (pessimistic scenario)					
	Number in 2001/02	Number in 2006/07	Proportion of Institutions offering ETPs		Proportion of study programmes taught in English		Proportion of ETP students	
			2001/02	2006/07	2001/02	2006/07	2001/02	2006/07
AT	6	23	6.0	14.6	0.8	1.8	0.1	0.7
BE	57	43	11.0	10.8	7.1	2.2	0.4	0.4
CH	15	52	11.4	22.6	2.5	3.7	1.2	1.2
CZ	35	41	42.3	29.4	3.5	2.0	0.5	0.4
DE	180	214	30.2	24.1	2.4	1.6	0.3	0.4
DK	42	96	13.2	16.0	7.0	7.4	0.5	3.0
ES	4	18	1.4	8.3	0.1	0.4	0.0	0.0
FI	85	208	66.7	66.0	5.0	13.9	2.0	2.7
FR	33	79	5.7	7.9	0.5	0.5	0.0	0.3
GR	9	8	6.5	12.2	0.9	0.5	-	0.1
HU	21	47	20.6	21.2	3.0	1.6	0.9	1.3
IS	3	1	37.5	11.1	3.0	0.3	0.3	0.1
IT	11	35	6.5	8.5	0.3	0.4	0.0	0.1
NL	115	509	28.3	41.9	11.5	17.0	0.9	5.3
NO	35	53	21.4	31.9	3.9	2.5	0.3	0.6
PL	27	90	16.0	16.2	1.0	1.7	0.2	0.3
PT	0	9	0.0	4.2	0.0	0.4	0.0	0.1
SE	42	123	26.3	30.8	3.5	4.1	0.2	0.8
SK	5	24	17.6	40.9	0.7	1.2	0.0	0.4
Total	725	1,673	15.8	17.4	2.0	2.3	0,2	0.6

English. The present figure of roughly 90,000 (in the countries involved in both studies) amounts to an almost three-fold rise. As absolutes, percentages have gone up, to roughly the same extent. The 1.8 percent (optimistic) and 0.6 percent (pessimistic) of today correspond to dismal 0.5 percent (optimistic) and 0.2 percent (pessimistic) in the 2002 study.

However, these averages are somewhat treacherous, since they say little about the developments in individual countries. Growth in the Netherlands and in Finland, above all, but also in Sweden, Switzerland and Denmark, has been stupendous. In other countries, not much has happened.

4 The institutional context

What sort of institution provides English-medium education – and what does not? Are research-oriented universities awarding degrees up to the PhD more likely than Bachelor-only colleges to offer English-medium programmes? Do larger institutions – in terms of student enrolment – more often offer English-taught programmes than smaller ones? How does the degree of internationalisation of an institution – measured by its share of international students – impact on the provision of English-medium education? Does the disciplinary profile of an institution matter, that is, do institutions with a broad subject range offer more programmes in English than mono-disciplinary ones? These are the questions which are raised – and answered – in this chapter. The findings of this chapter are based on the results of the Institutional Survey.

4.1 Level of academic degrees awarded

As Table 7 shows, the institutions participating in the Institutional Survey heavily lean towards advanced qualifications. Almost half of the institutions in the sample (49%) award academic programmes up to the PhD level. 36 percent of the sample award degrees up to the Master level. The Bachelor is the highest degree at only 15 percent of the sample. There are strong variations between countries, though. The Bachelor-only-type of institution in the sample forms the majority in Latvia and provides half of all institutions in Denmark. Slovak institutions participating in the survey are exclusively PhD-awarding universities; in Romania, this type of institution makes up 91 percent of the sample, and in Turkey and Spain 82 percent.

Of all the institutions responding to the Institutional Survey, slightly less than a half (48%) offer English-taught programmes. Of those who do not, eight percent intend to do so in the future. These values are considerably higher than those in the 2002 study, in which less than a third of all institutions offered English-medium education.

As can be seen from Table 8, institutions which award advanced degrees provide English-medium tuition much more often than those who award only Bachelors. 56 percent of all PhD-awarding universities offer English-taught programmes, but only 46 percent of Master-level institutions and a mere 27 percent of Bachelor-level colleges. It is, however, not unreasonable to suspect that the overall programme offer of universities with the full range of degrees is much higher than that of Bachelor-type colleges, and that the above finding says at least as much about the impact of institutional size as that of degree levels.

Table 7
Highest academic degree awarded by the institution – by country
(percentages)

	Country of university												HU
	AT	BE	BG	CH	CZ	DE	DK	EE	ES	FI	FR	GR	
Bachelor or equivalent	21	18	6	11	21	4	50	31	12	3	1	36	43
Master or equivalent	41	61	6	44	21	50	19	15	6	54	62	0	14
Doctorate / PhD	38	21	88	44	58	47	31	54	82	43	37	64	43
Total	100	100	100	100	100	100	100	100	100	100	100	100	100
Count (n)	(34)	(38)	(17)	(18)	(24)	(101)	(32)	(13)	(17)	(35)	(87)	(14)	(21)

	Country of university											Total	
	IT	LT	LV	NL	NO	PL	PT	RO	SE	SK	TR		Other
Bachelor or equivalent	8	52	0	17	3	24	38	0	11	0	0	13	15
Master or equivalent	28	5	36	45	55	25	38	9	32	0	18	53	
Doctorate/ PhD	64	43	64	38	42	51	24	91	58	100	82	33	49
Total	100	100	100	100	100	100	100	100	100	100	100	100	100
Count (n)	(39)	(21)	(11)	(29)	(31)	(76)	(37)	(22)	(19)	(12)	(34)	(15)	(797)

Source: Institutional Questionnaire

Question 1.4: Which degrees can be obtained at your institution?

Table 8
Offer of English-taught programmes – by highest degree awarded
(percentages)

	Highest academic degree awarded			Total
	Bachelor or equivalent	Master or equivalent	Doctorate/PhD	
Yes	27	46	56	48
No, but intend in the near future	10	9	7	8
No	63	45	37	44
Total	100	100	100	100
Count (n)	(120)	(287)	(390)	(797)

Source: Institutional Questionnaire

Question 1.5: Does your institution offer English-taught programmes?

4.2 Student population

The average number of students at the institutions responding to the survey is 7,133. It should be noted that it was impossible to differentiate between full-time and part-time students (and thus compute full-time-equivalents). Data according to this differentiation are available from some countries only.

Table 9
Overall number of students (full-time equivalents) enrolled in the academic year 2005/06 – by country (percentages)

	Country of university												
	AT	BE	BG	CH	CZ	DE	DK	EE	ES	FI	FR	GR	HU
Up to 500	15	14	19	28	33	14	19	8	13	3	28	7	5
501 - 1,000	18	11	6	6	4	12	23	23	0	0	16	0	5
1,001 - 2,500	35	24	25	22	17	9	32	46	6	19	28	7	30
2,501 - 5,000	6	27	19	6	13	25	6	8	0	25	11	13	15
5,001 - 10,000	9	16	25	11	13	20	13	0	19	33	5	33	10
10,001 and more	18	8	6	28	21	20	6	15	63	19	11	40	35
Total	100	100	100	100	100	100	100	100	100	100	100	100	100
Count (n)	(34)	(37)	(16)	(18)	(24)	(103)	(31)	(13)	(16)	(36)	(81)	(15)	(20)
Average number of students	6065	4094	4152	5030	5011	6676	2558	3428	27762	6788	3841	9905	7955

	Country of university											Total	
	IT	LT	LV	NL	NO	PL	PT	RO	SE	SK	TR		Other
Up to 500	29	18	9	11	17	9	25	5	17	10	0	38	16
501 - 1,000	9	14	18	7	14	10	19	5	6	10	3	19	11
1,001 - 2,500	14	32	18	11	28	22	14	5	0	0	17	6	19
2,501 - 5,000	0	14	45	11	21	7	19	16	11	20	10	13	15
5,001 - 10,000	3	14	0	7	10	25	8	32	39	40	10	19	16
10,001 and more	46	9	9	52	10	26	14	37	28	20	59	6	23
Total	100	100	100	100	100	100	100	100	100	100	100	100	100
Count (n)	(35)	(22)	(11)	(27)	(29)	(68)	(36)	(19)	(18)	(10)	(29)	(16)	(764)
Average number of students	13422	3953	3746	12049	3912	8063	3780	11231	8380	6761	15439	5967	7133

Source: Institutional Questionnaire

Question 1.1: Number of students (full-time equivalents) at your institution in the academic year 2005/06.

A look at Table 9 reveals substantial deviations from the overall average. Spanish and Turkish institutions are the largest, with averages of 27,762 and 15,439 respectively, while the Danish average is lowest, with 2,558. Accordingly, the percentage of all Spanish and Turkish universities with more than 10,000 students is highest at 63 and 59 percent, whereas small institutions with up to 2,500 students make up 77 percent of all respondents in Estonia, and 74 and 72 in Denmark and France respectively.

Table 10 displays a clear correspondence between the size of an institution and its likelihood to offer English-medium programmes. On average, 48 percent of all institutions offer such programmes. The percentage rises steadily from the smallest type of institution with up to 500 students, with 26 percent, to 62 percent in the case of the large universities (+ 10,000 students). Not surprisingly, size turns out to be one of the strongest determinants for the existence of English-taught programmes. Larger institutions offer more programmes (of any kind) than smaller ones and are therefore also statistically more likely to offer programmes in English. And since size mostly correlates with the award of the full spectrum of academic qualifications up to the PhD, it is realistic to conjecture that it is the larger, PhD awarding universities with a wide subject range which offer the highest number of English-medium programmes.

Table 10
Offer of English-taught programmes – by number of students enrolled (percentages)

	Overall number of students enrolled					Total	
	Up to 500	501 - 1,000	1,001 - 2,500	2,501 - 5,000	5,001 - 10,000	10,001 and more	
Yes	26	31	47	59	60	62	48
No, but intend in the near future	7	8	9	7	6	7	8
No	66	61	44	34	35	31	44
Total	100	100	100	100	100	100	100
Count (n)	(125)	(84)	(149)	(112)	(121)	(175)	(766)

Source: Institutional Questionnaire

Question 1.5: Does your institution offer English-taught programmes?

4.3 Enrolment of international students

As Table 11 shows, the average percentage of international students enrolled in the universities and colleges which participated in the Institutional Survey is 8.4 percent (up from 6.8% in 2002). The percentage is highest in Switzerland, at 19.6 percent, followed by Germany (15.5%) and Austria (13.9%). Switzerland also has the highest percentage of all in the group of institutions with over 20 percent of international students (39). Slovakia, Turkey and Poland are at the bottom of the table, with 1.2 and 1.4 percent respectively. It is noteworthy, though, that on a European average, the group of institutions

in the sample with the lowest percentage of international students (under one) is largest and the group with the highest percentage (20) is smallest.

Table 11
Percentage of international students (full-time equivalents) enrolled in the academic year 2005/06 – by country (percentages)

	Country of university												
	AT	BE	BG	CH	CZ	DE	DK	EE	ES	FI	FR	GR	HU
Up to one percent	9	18	29	11	30	3	33	54	0	8	6	54	55
1.1-5.0 percent	25	35	14	6	22	14	10	23	40	58	16	38	20
5.1-10.0 percent	9	24	21	28	26	33	13	15	47	25	26	8	15
10.1-20.0 percent	38	18	29	17	22	29	30	8	13	6	38	0	0
More than 20 percent	19	6	7	39	0	20	13	0	0	3	14	0	10
Total	100	100	100	100	100	100	100	100	100	100	100	100	100
Count (n)	(32)	(34)	(14)	(18)	(23)	(99)	(30)	(13)	(15)	(36)	(77)	(13)	(20)
Average percentage of foreign students	13.9	6.8	10.2	19.6	6.0	15.5	10.1	3.1	6.4	5.5	12.5	1.9	7.8

	Country of university												Total
	IT	LT	LV	NL	NO	PL	PT	RO	SE	SK	TR	Other	
Up to one percent	27	67	60	17	19	68	41	44	13	70	70	25	28
1.1-5.0 percent	42	24	20	33	44	25	53	44	47	30	26	19	27
5.1-10.0 percent	21	5	0	29	22	7	3	6	20	0	4	25	19
10.1-20.0 percent	3	0	10	13	15	0	3	6	13	0	0	13	16
More than 20 percent	6	5	10	8	0	0	0	0	7	0	0	19	9
Total	100	100	100	100	100	100	100	100	100	100	100	100	100
Count (n)	(33)	(21)	(10)	(24)	(27)	(68)	(32)	(18)	(15)	(10)	(23)	(16)	(721)
Average percentage of foreign students	7.7	2.2	5.5	12.3	5.4	1.4	2.5	3.0	9.5	1.2	1.2	14.9	8.4

Source: Institutional Questionnaire

Question 1.1: Number of students (full-time equivalents) at your institution in the academic year 2005/06.

When comparing the data in the above table with OECD data¹⁰, it turns out that the enrolment of international students in the institutions in the sample is not wholly untypical of the enrolment of international students in general in the countries in question. The high percentage values for Switzerland (19.6%) and Austria (13.9%) in the sample are roughly in line with OECD data for the entire higher education systems of these countries (Switzerland: 18.4% and Austria: 14.1%). But there are also important deviations. The percentage values for Germany deviate already visibly (sample: 15.5%, OECD: 11.5%), as do the ones for Finland (sample: 5.5%, OECD: 2.8%). In the case of the Netherlands, the deviation is substantial (sample: 12.3%, OECD: 5.6%).

At the same time, the above data make it possible to cautiously conclude that the drivers of foreign enrolment and of English-taught programmes are somewhat different. The relatively low enrolment rates of foreign students in Finland, the Netherlands, Norway and Denmark (on both sample and OECD data) stand in considerable contrast to the relatively elevated provision of English-taught programmes in these countries. This is almost certainly linked to the fact that these countries with – globally – quite rarely spoken languages cannot hope to enrol large numbers of foreign students in programmes taught in the domestic language, and therefore need to revert to English-taught provision as a counter-acting measure. This is not quite the same in Austria and Switzerland, with German and French being more often spoken than Dutch, especially in neighbouring countries, from which Switzerland and Austria draw many of their international students.

The interpretation that the drivers of foreign enrolment and the drivers of English-taught programmes are slightly different is also supported by Table 12 below. This table compares the institutions' foreign enrolment with the existence of a provision of English-taught programmes.

Table 12
Offer of English-taught programmes – by percentage of international students enrolled (percentages)

	Percentage of foreign students					Total
	Up to one percent	1.1-5.0 percent	5.1-10.0 percent	10.1-20.0 percent	More than 20 percent	
Yes	35	54	60	62	48	48
No, but intend in the near future	16	4	4	8	2	8
No	49	42	36	30	50	44
Total	100	100	100	100	100	100
Count (n)	(202)	(198)	(140)	(117)	(64)	(721)

Source: Institutional Questionnaire

Question 1.5: Does your institution offer English-taught programmes?

¹⁰ Cf. OECD, *Education at a Glance*, op. cit., p. 317.

The percentage of institutions offering programmes in English rises in parallel with the percentage of international students, but it drops again in the top category to the average of all institutions (48 percent). This is another reminder that the provision of English-medium programmes and international mobility are slightly different things. First, not all students enrolled in English-taught programmes are foreigners in the country where they study, as this study shows. Second, the 'counter-acting' role of English-medium programmes in some countries mentioned above certainly plays a role here.

4.4 Disciplinary profile

Almost three fifths of the universities and colleges which participated in the Institutional Survey (59%) offer programmes in a wide range of subject areas and are thus classified here as 'general', as Table 13 reveals. For the purposes of this study, a 'general institution' is one which offers programmes in the areas of the humanities, the social sciences, the natural (and life) sciences as well as in engineering. 26 percent of higher education institutions offer education only in the humanities and social sciences, and a mere 12 percent provide education in the natural sciences and engineering only. Compared to the 2002 study, the share of 'general' institutions in the sample has increased (from 53% to 59%), as has that of institutions in the humanities and social sciences (from 26% to 28%), whereas the share of universities and colleges in the natural and engineering sciences has decreased (from 15% to 12%).

Table 13
Disciplinary profile of institutions – by country (percentages)

	Country of university												
	AT	BE	BG	CH	CZ	DE	DK	EE	ES	FI	FR	GR	HU
General (Hum/Soc/Nat)	46	63	76	56	33	71	47	31	88	83	33	93	67
Humanities and social sc.	23	21	12	33	46	25	41	31	12	8	38	0	33
Natural sc. and engineering	23	13	12	6	17	3	9	38	0	8	28	7	0
Other	9	3	0	6	4	1	3	0	0	0	1	0	0
Total	100	100	100	100	100	100	100	100	100	100	100	100	100
Count (n)	(35)	(38)	(17)	(18)	(24)	(103)	(34)	(13)	(17)	(36)	(85)	(15)	(21)

	Country of university											Total	
	IT	LT	LV	NL	NO	PL	PT	RO	SE	SK	TR		Other
General (Hum/Soc/Nat)	43	48	58	69	60	54	68	65	67	58	85	44	59
Humanities and social sc.	46	38	42	24	30	36	15	4	11	17	6	25	26
Natural sc. and engineering	3	14	0	7	7	8	15	26	17	8	9	19	12
Other	8	0	0	0	3	3	3	4	6	17	0	13	3
Total	100	100	100	100	100	100	100	100	100	100	100	100	100
Count (n)	(37)	(21)	(12)	(29)	(30)	(76)	(40)	(23)	(18)	(12)	(34)	(16)	(804)

Source: Institutional Questionnaire

Question 1.3: In which of the following subject areas (according to the ERASMUS subject area classification) does your institution offer degree programmes?

Again, there are important differences between countries. The highest share of institutions with a 'general' subject range are found in Greece (93%), Spain (88%) and Turkey (85%), while Estonia (31%), France and the Czech Republic (both 33%) have the lowest share of such institutions. The share of institutions specialised in the natural sciences and engineering is surprisingly low in Germany, Italy (both 3%) and Switzerland (6%).

Table 14
Offer of English-taught programmes – by disciplinary profile
(percentages)

	Disciplinary profile				Total
	General (Hum/Soc/Nat)	Humanities and social sciences	Natural sc. and engineering	Other	
Yes	55	39	39	23	48
No, but intend in the near future	7	9	8	14	8
No	38	51	53	64	44
Total	100	100	100	100	100
Count (n)	(474)	(213)	(95)	(22)	(804)

Source: Institutional Questionnaire

Question 1.5: Does your institution offer English-taught programmes?

Institutions with a wide subject range ('general') do not only form the majority among those participating in the survey. They are also the type with the highest proportion of English-taught programmes. 55 Percent of them do offer English-medium instruction. Only 39 percent of both types of 'specialised' institutions do so.

The pattern of institutions offering education in English becomes quite clear now. The type of institution which typically offers English-taught programmes is a research-oriented (PhD-awarding) institution, with a large student population, and a comprehensive ('general') disciplinary offer.

4.5 Reasons for not offering programmes in English

The universities and colleges which participated in the Institutional Survey and did not offer programmes taught in English were asked to explain why they did not do so. Across Europe, the most frequently stated reasons were the following:

- Lack of financial resources for the development or operation of English-taught programmes (50%);
- Lack of academic staff members with sufficient foreign language skills (43%);
- Lack of interest of faculties to offer such programmes (23%);
- Other reasons (45%).

Table 15
Reasons for not offering English-taught programmes – by country
(percentages, multiple replies possible)

	Country of university																Total
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other		
Lack of financial resources for the development or operation of English-taught Programmes	50	52	22	33	46	14	100	52	25	67	67	50	0	33	57	50	
Lack of interest of faculties to offer such programmes	36	22	22	17	21	14	0	21	25	33	22	25	100	22	20	23	
Lack of academic staff members with sufficient foreign language skills	29	35	11	100	39	29	0	45	50	0	33	42	50	44	51	43	
Other reasons	43	52	89	33	43	100	0	42	50	100	56	29	0	67	38	45	
Total	157	161	144	183	150	157	100	161	150	200	178	146	150	167	167	161	
Count (n)	(14)	(23)	(9)	(6)	(28)	(7)	(1)	(33)	(4)	(3)	(9)	(24)	(2)	(9)	(84)	(256)	

Source: Institutional Questionnaire

Question 1.6: If your institution does not offer English-Taught Programmes, what are the reasons?

A country-comparative analysis of the reasons which institutions state for not offering English-taught programmes is only partially possible. In the case of countries with fewer than five responding institutions (Finland, Sweden, The Netherlands, and Lithuania), a statistical analysis is hardly justifiable. Disregarding these countries, the Norwegian institutions in the sample surprisingly are the 'poorest', i.e. they have the biggest share of any country referring to a lack of financial means to set up English-taught programmes (67%). Such a lack of solvency plays the least role in Danish (14%) and Swiss institutions (22%). A lack of interest on the part of the faculty is least often quoted as an obstacle by Danish (14%) and Czech respondents (17%), and most often by Austrian survey participants. Language command is an obstacle for all (100%) Czech responding institutions, but it plays practically no role in the case of Swiss institutions (11%). The countries with the lowest percentage values in the above three categories – Switzerland and Denmark – are also those that mention “other reasons” most often (89% and 100% respectively).

The answer “other reasons” allowed institutions to respond in free text; in other words, this was not a 'closed' question. A closer look at the sub-group of the 119 institutions in this category reveals a number of thematic clusters.

16 percent of respondents in the 'other' category claim they intend to offer English-taught programmes in the future. A further group (9%) does offer programmes partially taught in English, which this study excludes (but the 2002 predecessor study did not).

The explanations of the remaining institutions for not offering and not planning to offer English-taught programmes can be broken down into the following categories.

- Legal / regulatory impediments: 24 institutions, or about 20 percent, claim to be bound by legal restrictions and/or institutional regulations. This is certainly true for (the Flemish-speaking part of) Belgium, where only a certain percentage of programmes may be offered in another language than Dutch.
- Legal / employment-related impediments: One third of the above-mentioned 24 institutions states employment-related reasons for not expanding their offer to fully English-taught programmes. This mainly concerns such groups as medical students or students training to be teachers, whose future profession is deemed to require a good command of the domestic language. One Austrian institution remarks that "in order to safeguard the doctor-patient relationship" students need to be able to communicate in the local language.
- Fine arts / individual teaching: These respondents, often conservatories of music, offer one-to-one training and the classes are usually taught in the language the teacher and student master best, which may of course be different from the local language. As one Swiss respondent so aptly puts it: "Music is our common language." Seven institutions (about 6%) stated this reason.
- 'Other priorities': 19 institutions (about 16%) answered that they had more urgent priorities than introducing English-taught programmes. One Portuguese institution, for example, replied it was busy implementing other change ("merging with two other nursing colleges"). Next to answers that pick up the reasons offered in Table 15, 7 (3) respondents feel they are too small (too young) an institutions to be offering such programmes.
- Lack of demand: The most common reason stated for not offering English-medium tuition is an anticipated lack of student demand: 27 institutions believe there would not be enough students interested in taking an English-taught degree at their university. While this may be understandable in the case of language-related subjects such as Hebrew Studies, which was reported by an institution in Germany and is, even there, geared to a rather exclusive target group, it is often unclear upon what exactly the assessment of the institutions is based. The respondents in this group were mainly from southern European countries (Portugal, Spain, Italy), but also from Germany (5) and Poland (4). It is interesting to note that no Scandinavian country was featured in this group.

5 Characteristics of English-taught programmes

The previous chapter provided a description of the institutions which offer English-medium education. This present chapter examines the programmes themselves. It looks at the disciplinary distribution of English-taught programmes, at the levels of study in which they are provided (Bachelor/Master), at the duration of programmes, and at the admission conditions. Further, the chapter tries to establish the 'age' of English-taught programmes – are they a fairly recent phenomenon, or have they already been in place for many years -, it examines if they charge tuition fees and how high those are, and it looks at the provision of scholarships. Last, it tries to answer the important question where the students enrolled in English-taught programmes come from.

The data and information presented in this chapter were obtained first and foremost by means of the Programme Survey (cf. Chapter 2). In the Programme Survey, the Programme Directors of 2,381 English-taught programmes identified by means of the earlier Institutional Survey and by an additional scrutiny of online databases in the Netherlands, Finland and Germany were asked to fill in a Programme Questionnaire, which 852 did (36%). In most countries, the return rate was close to 50 percent. Excluding countries with a number of programmes below 20 (Cyprus, Estonia, Spain, Greece, Iceland, Latvia, Portugal), return rates below 30 percent occur only in Turkey (29%), the Czech Republic (27%), the Netherlands (25%) and Poland (19%). For most countries, the base of available data is thus sufficiently broad to draw a relatively reliable picture of the characteristics of English-taught programmes.

5.1 Subject areas

About two thirds of all programmes reported in the Programme Survey are mono-disciplinary. One third is multi-disciplinary, i.e. the curriculum is made up of components from at least two different subject area groups.

As Table 16 displays, the most frequent subject area is engineering, with a share of 27 percent, closely followed by business and management studies (24%) and the social sciences (21%). Together, these three groups constitute the bulk of all English-medium education in Europe. Further disciplines with a share of more than ten percent are the natural sciences (15%) and mathematics/informatics (12%). All other subject areas remain below ten percent. Despite this concentration, it is noteworthy that there is no single discipline, and probably hardly any specialisation, which is not available as an English-taught programme somewhere in Europe.

The above results deviate somewhat from those of the 2002 study. In 2002, the top subject area group was business/management studies, with a huge lead over the second-ranked subject area group, engineering (more than

double the share). These two groups have now swapped ranks. The social sciences, on fourth place in 2002, have moved to the third rank, with a proportion not much smaller than that of business/management studies.¹¹

Table 16 shows that the overall distribution across disciplines differs by level of study. The field of business and management studies is the clear leader in undergraduate (Bachelor-level) programmes. Programmes in engineering, the natural sciences and mathematics and computer science, on the other hand, tend to be offered at the Master level.

Table 16
Subject areas of English-taught programmes – by level of academic degree awarded (percentages, multiple replies possible)

	Level of degree awarded			Total
	Bachelor	Master	Bachelor + Master	
Agricultural Sciences	6	5	3	5
Architecture, Urban and Regional Planning	2	3	0	2
Art and Design	5	3	3	3
Management	42	20	28	24
Education, Teacher Training	2	1	8	2
Engineering, Technology	19	28	33	27
Geography, Geology	3	11	6	9
Humanities	3	7	17	7
Languages and Philological Sciences	2	1	3	2
Law	1	5	0	4
Mathematics, Informatics	7	13	14	12
Medicine, Health Sciences	4	7	6	6
Natural Sciences	6	17	22	15
Social Sciences	21	20	22	21
Communication and Information Sciences	2	3	0	2
Other areas of study	1	3	3	2
Total	126	148	167	145
Count (n)	(140)	(676)	(36)	(852)

Source: Programme Questionnaire

Question 1.6: What is the subject area of the programme (according to the ERASMUS subject area codes – see end of this questionnaire)?

11 It is not easy to compare the percentages of the individual subject areas between 2002 and today. Due to the fact that the present survey allowed multiple subject area entries (up to three), but the earlier one did not, the percentage values in the present study are higher. But this does not affect the validity of the ranking of subject areas.

Table 17
Subject areas of English-taught programmes – by country
(percentages, multiple replies possible)

	Country of university															Total
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other	
Agricultural Sciences	20	0	7	45	6	13	2	0	0	4	19	0	0	0	5	5
Architecture, Urban and Regional Planning	0	11	0	9	4	0	0	0	0	3	0	0	5	0	0	2
Art and Design	10	6	0	0	1	2	5	0	0	8	0	0	2	0	2	3
Management	30	22	11	27	20	11	34	31	31	26	12	41	13	37	26	24
Education, Teacher Training	0	0	0	0	0	4	2	0	0	2	0	0	3	7	2	2
Engineering, Technology	20	11	41	27	36	36	24	42	6	15	23	6	43	26	19	27
Geography, Geology	10	17	11	18	12	13	7	0	6	8	15	6	7	0	7	9
Humanities	10	6	4	9	3	13	5	0	0	10	15	0	11	11	2	7
Languages and Philological Sciences	0	0	0	0	1	4	0	0	0	3	0	0	0	7	2	2
Law	10	0	7	0	5	0	1	12	13	8	4	0	2	0	2	4
Mathematics, Informatics	10	11	7	0	14	4	13	15	6	8	23	12	20	15	19	12
Medicine, Health Sciences	10	6	4	0	6	4	7	0	13	7	4	6	10	4	7	6
Natural Sciences	10	6	22	27	26	11	11	8	13	11	23	6	13	4	14	15
Social Sciences	10	33	11	18	17	11	14	12	19	32	27	35	15	22	23	21
Communication and Information Sciences	0	0	0	0	3	7	2	0	0	4	4	0	2	0	0	2
Other areas of study	0	6	0	0	2	0	5	0	0	3	0	6	2	0	2	2
Total	150	133	126	182	156	136	133	119	106	154	169	118	146	133	133	145
Count (n)	(10)	(18)	(27)	(11)	(211)	(45)	(123)	(26)	(16)	(191)	(26)	(17)	(61)	(27)	(43)	(852)

Source: Programme Questionnaire

Question 1.6: What is the subject area of the programme (according to the ERASMUS subject area codes – see end of this questionnaire)?

The discipline pattern of English-medium programmes differs between countries to a certain extent, as Table 17 reveals. In the Netherlands, Europe's top provider of English-medium education, the social sciences (32%) are most frequent in the sample, which probably partly explains this subject group's relatively strong presence in the overall European picture (see above).

Management and business studies come second (26%), and engineering, the Europe-wide leader, is only a weak third (15%).

In Germany, Europe's number two provider in absolute terms, engineering leads in the sample, with 36 percent. This is probably the single most important factor which made engineering overtake business and management as Europe's top discipline in English-medium tuition (even though other countries, such as Sweden with 43 percent, add to this result too). Business and management are under-represented in this country, at 20 percent. Germany has Europe's strongest share in the natural sciences (26%).

Finland, in absolute terms the number three provider of English-taught programmes in Europe, is strongest in management and business with 34 percent in the sample (a share only topped by Poland, with 41%). The Finnish institutions in the sample perform slightly under the European average in engineering.

5.2 Degree levels

English-taught programmes in Europe are very predominantly offered in the second cycle (Master level). As Table 18 shows, almost four fifths of all programmes (79%) belong to this category. Only 16 percent are Bachelor programmes. Only four percent stated they offer the opportunity to earn both a first-cycle and a second-cycle degree.¹²

Table 18
Degree(s) awarded for the successful completion of the programme – by country (percentages)

	Country of university															Total	
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other		
Only Bachelor level		20	6	0	18	7	20	28	8	25	21	4	12	2	41	37	16
Only Master level		80	94	93	73	92	80	72	92	69	76	88	65	95	11	56	79
Bachelor + Master		0	0	7	9	1	0	1	0	6	3	8	24	3	48	7	4
Total		100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
Count (n)		(10)	(18)	(27)	(11)	(211)	(45)	(123)	(26)	(16)	(191)	(26)	(17)	(61)	(27)	(43)	(852)

Source: Programme Questionnaire

Question 1.11: Please state the level of academic degree awarded on successful completion of the programme and the standard period of study in months or alternatively the number of ECTS credits allocated to the programme.

¹² These are programmes for which Programme Directors in the Programme Survey ticked both the "Bachelor" and "Master box", which was not foreseen as a possibility. In some cases, these might be 'long' single-cycle programmes of the pre-Bologna type (which respondents were asked to classify as Masters). In other cases, it might be that the programme exists both as a Master and as a Bachelor (in which eventually respondents had been expected to fill in two separate questionnaires).

The trend towards Master-level programmes, which could already be observed in the 2002 study, has thus been further strengthened. In 2002, the share of second-cycle programmes was 68 percent. Bachelor programmes made up almost one quarter (24%) at the time.

There are some variations by country. Turkey has a relatively high proportion of Bachelor programmes, at 41 percent of total provision. The share is also high in the “other” countries, with 37 percent, which have been grouped into one single category because the number of programmes in each single country turned out to be too small for a statistical analysis. The dominance of Master programmes is strongest in Sweden, Belgium, Switzerland and Germany, where the postgraduate share exceeds 90 percent. Turkey has a very high proportion of programmes leading to both a Bachelor and a Master.

5.3 Duration and admission requirements

The award of a first-cycle degree (Bachelor) requires on average 3.4 years of study. The award of a second-cycle degree (Master) requires a further 1.7 years. The duration of both types of degrees was almost identical in the 2002 study (3.4 and 1.8 years). Among the ‘standard’ types of English-taught programmes, i.e. first-cycle programmes demanding as a minimum admission requirement the eligibility to attend higher education and second-cycle programmes requiring a Bachelor or equivalent for admission, only marginal differences can be found in the duration between countries, which is why no table is presented here.

For almost all Bachelor programmes, the minimum educational admission requirement is a secondary-school-leaving certificate at advanced level (*baccalauréat*, *Matura*, *Abitur*, etc.) or the general eligibility to enter into higher education. Of these programmes

- 48 percent have a duration of three years,
- 21 percent have a duration of 3.5 years, and
- 31 percent have a duration of four years.

Compared to 2002, when 40 percent lasted three years, 33 percent 3.5 years and 27 percent four years, the 3.5-year type has lost ground, whereas the shorter and longer types have become more frequent.

Almost every second-cycle programme requires an undergraduate degree for admission (98%, up from 87% in 2002). Only two percent of English-taught Master programmes accept secondary school leavers directly. Of the programmes requiring a Bachelor Degree (or an equivalent) for admission, 36 percent have a duration of between one and 1.5 years and the remaining 64 percent have a duration of about two years. There is thus a clear preference for the two-year Master.

Beyond these standard educational admission requirements, almost all Programme Directors state additional conditions to be admitted to an English-taught programme. As Table 19 shows,

- 86 percent require a test of proficiency in English (such as the TOEFL, IELTS, etc),
- 30 percent require an entrance examination,
- 16 percent demand “extraordinary disciplinary, artistic or intellectual potential” (often in the fine and performing arts),
- 9 percent demand professional work experience,
- 9 percent require an extraordinary personal and social potential, and
- 48 percent mention other admission requirements, e.g. letters of motivation, references or recommendations, special skills etc.

As in 2002, the most common admission requirement is a test of English language skills. It has even gained in importance. In 2002, 68 percent of all programmes had this requirement. Now the share has risen to 86 percent. This might indicate a concern that the language skills of many applicants are not satisfactory. Most of the remaining requirements had higher values in the 2002 study, i.e. they have become less important, with the exception of the category ‘other requirements’ (48%, up from 21% in 2002).

An English test is more common in Master-level programmes than in Bachelor programmes (90%, compared to 67%). On the other hand, Bachelor programmes more often require candidates to take an entrance examination test.

Table 19
Other admission requirements – by level of academic degree awarded (percentages, multiple replies possible)

	Level of degree awarded			Total
	Bachelor	Master	Bachelor + Master	
Test of proficiency in the language of instruction	67	90	76	86
Entrance Examination/Test	57	23	59	30
Extraordinary disciplinary/ artistic/ intellectual potential	9	18	7	16
Extraordinary personal/ social potential	10	10	0	9
Professional work experience	0	12	0	9
Other admission requirements	30	53	14	48
No other admission requirements	9	0	7	2
Total	183	206	162	200
Count (n)	(138)	(610)	(29)	(777)

Source: Programme Questionnaire

Question 2.1: a) Admission Requirements: b) Other requirements

As Table 20 shows, these extra admission requirements differ substantially between countries. The requirement of an English test is most frequent in Sweden, the Netherlands, Switzerland and Germany. In each of these countries, more than 90 percent of all programmes feature this admission requirement. Against the trend, few Lithuanian and Czech institutions insist on a proof of proficiency in English (36% and 40% respectively). Entrance examinations play a key role in Turkey with 74 percent, but this may be standard admission practice and not a specific feature of English-taught programmes. ‘Other’ admission requirements are very important in Switzerland (80%) and Germany (63%), but it will always remain the secret of the Swiss and Germans which exactly these are.

Table 20
Other admission requirements – by country
(percentages, multiple replies possible)

	Country of university															Total
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other	
Test of proficiency in English	70	89	92	40	92	81	80	85	36	94	89	55	96	72	69	86
Entrance Examination/Test	50	17	8	70	25	13	45	46	27	20	0	45	6	84	74	30
Extraordinary disciplinary/ artistic/intellectual potential	20	17	4	20	31	0	8	4	0	19	0	9	7	0	10	16
Extraordinary personal/ social potential	20	0	4	10	24	0	3	8	0	4	0	9	4	0	13	9
Professional work experience	0	17	4	0	22	3	3	12	0	4	5	9	6	0	10	9
Other admission requirements	20	33	80	20	63	26	28	23	64	62	47	36	44	20	26	48
No other admission requirements	0	0	0	10	0	6	3	4	27	1	0	27	0	0	3	2
Total	180	172	192	170	256	129	170	181	155	203	142	191	163	176	205	200
Count (n)	(10)	(18)	(25)	(10)	(200)	(31)	(120)	(26)	(11)	(178)	(19)	(11)	(54)	(25)	(39)	(777)

Source: Programme Questionnaire

Question 2.1: a) Admission Requirements: b) Other requirements

5.4 Year of introduction

The 2002 study came to the conclusion that English-medium programmes were “a very young phenomenon”. This holds true still today. The main reason behind this finding is the continued strong growth in the creation of English-medium offers.

Only about one fifth of all programmes participating in the survey are pre-2000 creations. The majority (51%) was set up in the last four years (since 2004). More than one quarter were even created in the last two years. Master-level programmes are even younger than Bachelor-type ones, which confirms the earlier finding that growth since the last survey has been particularly strong in the second cycle. Only the programmes which respondents categorised as belonging both to the Bachelor and the Master level were created predominantly before the year 2000. Should these be mainly long single-cycle programmes, this would appear to suggest that the formative power of the Bologna Process has reached English-medium tuition, too.

Table 21
Year of implementation of English-taught programmes – by level of academic degree awarded (percentages)

	Level of degree awarded			Total
	Bachelor	Master	Bachelor + Master	
Up to 1999	37	16	57	21
2000 – 2003	29	27	17	27
2004 – 2005	17	26	17	24
2006 – 2007	17	30	9	27
Total	100	100	100	100
Count (n)	(126)	(652)	(35)	(813)

Source: Programme Questionnaire

Question 1.2: Year in which the programme was set up.

As was already the case in the predecessor study, the 'age' of English-medium programmes differs between countries, of which Table 22 gives account.

Table 22
Year of implementation of English-taught programmes – by country (percentages)

	Country of university																Total
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other		
Up to 1999	20	28	4	11	25	7	24	19	20	14	15	12	16	83	31	21	
2000 – 2003	40	28	4	11	36	22	17	8	20	40	38	18	18	13	14	27	
2004 – 2005	10	11	44	56	17	24	21	19	20	37	23	35	23	4	24	24	
2006 – 2007	30	33	48	22	22	46	39	54	40	10	23	35	43	0	31	27	
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	
Count (n)	(10)	(18)	(27)	(9)	(211)	(41)	(119)	(26)	(15)	(168)	(26)	(17)	(61)	(23)	(42)	(813)	

Source: Programme Questionnaire

Question 1.2: Year in which the programme was set up.

Turkey is an ‘anomalous’ case, since in this country the very vast majority (83%) of all programmes date back to the time before 2000. No other country comes anywhere near a similar proportion of ‘old’ programmes. Countries with a high share of ‘new programmes’, i.e. such started in 2006 or 2007, are France (54%), Switzerland (48%), Denmark (46%) and Sweden (43%). Countries with a very low rate of ‘new’ programmes are Turkey (none), the Netherlands (10%), Germany (22%) and Norway (23%). In most of these countries, the peak of programme creation lies in the years between 2000 and 2005. One is tempted to conjecture that in most of these countries a saturation point has been reached. Future surveys will track if this is indeed the case.

5.5 Use of Diploma Supplement

In order to increase transparency and recognition of higher education qualifications, the European Commission, in cooperation with the Council of Europe and UNESCO/CEPES, developed the so-called “Diploma Supplement”. This document, to be issued in addition to the “regular” diploma, provides extra information on the national higher education system, a description of the type and level of the academic degree awarded, the higher education institution which awarded the degree, the structure and content of the programme, and a transcript of record of the graduate.

Table 23
Use of the Diploma Supplement – by country (percentages)

	Country of university															Total
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other	
Yes	80	88	92	100	89	52	91	60	100	89	86	100	74	89	75	85
No	20	12	8	0	11	48	9	40	0	11	14	0	26	11	25	15
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
Count (n)	(10)	(17)	(25)	(11)	(196)	(44)	(117)	(25)	(16)	(170)	(22)	(16)	(47)	(27)	(40)	(783)

Source: Programme Questionnaire

Question 1.13: Do you use the Diploma Supplement as an attachment to the diploma?

As Table 23 shows, the use of the Diploma Supplement has become almost standard practice in English-taught programmes in Europe. On a European average, 85 percent of all programmes provide their graduates with this document. All programmes in the Czech Republic, Lithuania and Poland do so. Only in Denmark (52%), France (60%) and Sweden (74%), the share of non-users exceeds a quarter of all programmes.

The use of the Diploma Supplement has increased very palpably since the 2002 study. At the time, only half of all English-medium programmes issued this document. The authors cannot exclude, however, that this is a general trend not peculiar of English-medium programmes.

5.6 Characteristics of the curriculum

Experience indicates that pioneers in one particular field of reform and internationalisation, such as the creation of English-taught programmes, are also innovators in other respects. It might therefore be reasonable to expect that, next to the use of English as a medium of instruction, curricula of programmes delivered in English would be characterised by further features typical of modern and internationalised programmes. Indeed, this turned out to be – by and large – a tenable assumption, for

- 96 percent of Programme Directors claim that their English-taught programme has an “international dimension”;
- 62 percent of programmes provide language training (be it in English, the domestic language, or both);
- 31 percent of Programme Directors report the offer of ‘bridging’ courses aimed at bringing students with different degrees of prior knowledge to a homogeneous academic level;
- 27 percent of programmes include a mandatory internship or work placement in the country in which the institution is located;
- 16 percent include a mandatory study period abroad;
- 21 percent report other reform characteristics.

What might come as a surprise – at a first glance – is the relatively low percentage of programmes with an integrated and mandatory study abroad phase. But most of the English-taught programmes are offered at the Master level and thus of relatively short (maximum two years’) duration, where it is more difficult to integrate a study-abroad phase than in longer programmes. In addition, it is less necessary than in ‘conventional’ programmes to internationalise the study experience through a stay abroad, for 65 percent of all students are non-domestic students and have thus already moved abroad.

It is hardly surprising that almost every Programme Director stresses the ‘international dimension’ of the programme. Based on an OECD typology for internationalised curricula¹³, the “international dimension” was broken down into the nine sub-categories below. According to Programme Directors,

- 85 percent of all programmes award an internationally recognised type of degree, such as a Master or a Bachelor;
- 53 percent of all programmes prepare students for international employment and careers, e.g. those in international business administration;
- 49 percent of programmes are on an ‘international’ subject matter, for example International Relations, European Law etc.;
- 44 percent broaden traditional subjects by means of an internationally comparative approach;

13 Cf. M.C. van der Wende, „Internationalizing the Curriculum in Higher Education. Synthesis Report of Country Case Studies Conducted in Austria, Denmark, France, Germany, Japan and the Netherlands”, OECD/CERI, *Internationalisation of Higher Education*. Paris 1996.

- 43 percent of curricula address cross-cultural communication issues and provide training in intercultural skills;
- 29 percent of programmes are ‘area’ or ‘regional studies’ of an interdisciplinary sort (e.g. European, Nordic, South-East Asian Studies);
- 27 percent of all programmes feature curricula that are especially designed for international students;
- 18 percent of programmes award joint or double degrees; and
- 16 percent of programmes are characterised by other international characteristics.

English-taught programmes at the Bachelor level seem to be somewhat more ‘internationalised’ than Master programmes (see Table 24). They clearly more often address an international subject matter (62% as compared to 46%) and cross-cultural communication issues (66% and 38%), but they also score higher on most of the other characteristics of internationalisation.

Table 24
International dimension within the curriculum – by level of academic degree awarded (percentages, multiple replies possible)

	Level of degree awarded			Total
	Bachelor	Master	Bachelor + Master	
International subject matter (e.g. international relations, European law)	62	46	44	49
Traditional/ original subject area broadened by an internationally comparative approach	52	42	47	44
Preparation of students for international professions (e.g. international business administration)	61	51	47	53
Addressing of cross-cultural communication issues and provision of training in intercultural skills	66	38	50	43
Interdisciplinary programme such as area and regional studies (e.g. European, Scandinavian, Asian studies)	35	28	28	29
Internationally recognised qualifications awarded (e.g. Bachelor or Master)	82	86	86	85
Joint or double degree awarded	21	17	31	18
Content is especially designed for foreign students	25	27	22	27
Other	17	15	11	16
None	4	3	6	3
Total	426	354	372	366
Count (n)	(134)	(668)	(36)	(838)

Source: Programme Questionnaire

Question 1.7: Which of the following aspects are characteristics of the curriculum?

As Table 25 shows, the importance attached to individual characteristics differs from country to country.

Table 25
International dimension within the curriculum – by country (percentages, multiple replies possible)

	Country of university														Total	
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other	
Internationally recognised qualifications awarded (e.g. Bachelor or Master)	60	94	100	73	92	90	76	58	79	91	88	82	82	74	79	85
Preparation of students for international professions (e.g. international business administration)	60	33	54	36	58	51	52	65	36	59	50	76	28	37	45	53
International subject matter (e.g. international relations, European law)	80	50	50	36	45	56	42	69	50	61	50	71	16	33	50	49
Traditional/original subject area broadened by an internationally comparative approach	20	44	12	55	35	51	39	58	50	57	71	71	36	30	48	44
Addressing of cross-cultural communication issues and provision of training in intercultural skills	50	28	15	36	58	18	44	54	43	38	46	53	30	37	43	43
Interdisciplinary programme such as area and regional studies (e.g. European, Scandinavian, Asian studies)	20	17	50	27	36	36	29	12	29	25	38	47	16	26	24	29
Content is especially designed for foreign students	10	44	8	18	36	13	24	58	50	21	33	35	26	7	19	27
Joint or double degree awarded	40	17	12	36	18	15	16	50	21	11	8	12	15	33	36	18
Other	10	17	8	9	21	3	16	27	0	17	8	24	15	0	7	16
None	0	0	0	9	2	8	4	0	0	4	0	0	5	11	0	3
Total	350	344	308	336	401	341	343	450	357	384	392	471	269	289	350	366
Count (n)	(10)	(18)	(26)	(11)	(211)	(39)	(122)	(26)	(14)	(190)	(24)	(17)	(61)	(27)	(42)	(838)

Source: Programme Questionnaire

Question 1.7: Which of the following aspects are characteristics of the curriculum?

The picture is relatively homogenous with regard to the overall top-named characteristic (internationally recognised qualifications). All countries, with the exception of Austria and France, accord the highest importance to this trait. There is only moderate variation between countries, with percentages ranging from 100 (Switzerland) at the top, to Austria at the bottom, with 60 percent. With regard to the second-ranked characteristic (preparation of students for an international profession), the spread is somewhat wider, with Belgium at 33 percent at the bottom, and Poland at the top, at 76 percent. Differences between countries are most marked in the third-often-named category (international subject matter), with Austria at the top end (80%) and Sweden at the bottom, with a mere 16 percent. It is interesting that Sweden accords less importance than the European average to every single characteristic, which might of course also indicate a general scepticism with regard to the question.

Table 26
Characteristics of the curriculum – by level of academic degree awarded (percentages, multiple replies possible)

	Level of degree awarded			Total
	Bachelor	Master	Bachelor + Master	
International dimension within the curriculum	93	97	94	96
Language training	82	57	83	62
Special courses to bring abilities of students to a homogenous level	29	31	39	31
Mandatory Work Placement in home country	47	22	25	27
Mandatory Study/ work placement abroad	36	15	17	19
Other characteristics	24	20	17	21
Not ticked	4	1	0	2
Total	316	243	275	257
Count (n)	(140)	(676)	(36)	(852)

Source: Programme Questionnaire

Question 1.7: Which of the following aspects are characteristics of the curriculum?

The percentage values for undergraduate and graduate-level courses differ remarkably with regard to three items: language training, work placements (in the country of study), and study abroad. In all three cases, the value for the Master level is considerably lower than that for the Bachelor level.

The percentage values for language training are 82 at the Bachelor level and 57 for Master programmes. Language training comprises both training in English and in the domestic language. In the case of English, it could be that European higher education institutions – reasonably or not – assume that older students in (often already research-gearred) postgraduate education

have a higher proficiency in this language and therefore need less extra help. In the case of training in the domestic language, the phenomenon is even less easily explained. As will be seen further on, the share of international students is much higher in Master-level English-taught programmes and, one could assume, therefore also furthers the need for language improvement. On the other hand, we do not know how many of the Master-level students have already been in the country for some time (for a Bachelor programme, for example) and how many English-medium students actually feel the need for improvement in the domestic language, given that the main supplier countries (such as the Netherlands and the Nordic countries) are virtually bilingual (domestic language and English).

The discrepancy is equally large in the case of a mandatory internship in the country of study. As Table 26 shows, the respective proportion is twice as high in first-cycle programmes as in second-cycle English-taught education (47% compared to 22%). On average the duration of mandatory work placements is four months in first-cycle programmes, and five months in second-cycle programmes. There is also a large Bachelor-Master gap with regard to study and internship abroad. A study or internship period in a foreign country is a mandatory part of 19 percent of all English-taught programmes, but much more common in the first (36%) than in the second cycle (15%). The average duration of mandatory study periods abroad is five months in first-cycle programmes and 4.5 months programmes at the Master level. In both cases – internships at home as well as study and internship periods abroad – an explanation of the concentration on the Bachelor level is probably the longer duration of first degrees. As stated above, in the case of study abroad, the fact that most English-medium graduate students are already in a foreign country certainly comes into play.

Again, the picture is more varied by country, as a look at Table 27 reveals. Between-country variation is least pronounced in the case of the most-frequently named category (international dimension in the curriculum), with a spread between 100 (Switzerland) and 84 percent (Denmark). Differences between countries are much stronger when it comes to the provision of language training, with a range from 92 percent (France) to 25 percent (Lithuania). It is interesting to note that the Scandinavian countries (Denmark, Sweden and Norway) and the Netherlands, which were earlier in this study characterised as 'bilingual', all have below-average percentage points. Between-country differences are also substantial with regard to the provision of 'bridging courses' to bring students' prior knowledge onto a homogenous level. No courses of this type are offered in Swiss English-medium programmes at all, whereas almost every second Polish programme (47%) provides them. In-country work placements as part of the curriculum are also unevenly distributed across Europe - with no single Belgian programme making such a requirement, but 54 percent of all programmes in France and 48 percent in Poland. Differences between countries are almost as marked in the case of

Table 27
Characteristics of the curriculum – by country
(percentages, multiple replies possible)

	Country of university																Total
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other		
International dimension within the curriculum	100	100	96	91	98	84	95	100	88	97	92	100	97	93	98	96	
Language training	80	39	81	64	76	53	76	92	25	40	46	71	38	81	77	62	
Special courses to bring abilities of students to a homogenous level	10	22	15	0	35	9	37	31	19	28	38	47	44	37	28	31	
Mandatory Work Placement in home country	20	0	22	18	29	13	27	54	31	23	8	18	34	48	33	27	
Mandatory Study/work placement abroad	40	11	26	0	21	7	19	38	13	24	23	12	3	4	14	19	
Other characteristics	10	22	7	9	25	13	16	23	13	25	12	24	20	22	21	21	
Not ticked	0	0	4	0	0	13	1	0	13	1	8	0	0	0	2	2	
Total	260	194	252	182	285	193	271	338	200	237	227	271	236	285	272	257	
Count (n)	(10)	(18)	(27)	(11)	(211)	(45)	(123)	(26)	(16)	(191)	(26)	(17)	(61)	(27)	(43)	(852)	

Source: Programme Questionnaire

Question 1.7: Which of the following aspects are characteristics of the curriculum?

mandatory study or internship periods abroad. No such requirements exist in the Czech Republic, and they are also very rare in Sweden (3%), Turkey (4%) and Denmark (7%), whereas they are most common in Austria (40%) and France (38%).

Almost two thirds of all English-taught programmes (62%) offer language training (see Table 28). With a share of 85 percent, the proportion is substantially higher in first-cycle programmes than at the Master level (57%).

Slightly more than one quarter of all English-taught programmes (27%) offer training both in the domestic language and in English. 18 percent provide such offers only in the domestic language and 17 percent provide English only.

Table 28
Offer of language training – by level of academic degree awarded
(percentages)

	Level of degree awarded			Total
	Bachelor	Master	Bachelor + Master	
Foreign and domestic language	47	23	36	27
Only foreign language	28	14	31	17
Only domestic language	10	20	14	18
No language training offered	15	43	19	37
Total	100	100	100	100
Count (n)	(134)	(668)	(36)	(838)

Source: Programme Questionnaire

Question 1.7: Which of the following aspects are characteristics of the curriculum?

Table 29
Offer of language training – by country (percentages)

	Country of university																Total
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other		
Foreign and domestic language	20	11	77	36	27	10	53	23	14	14	33	18	13	33	33	27	
Only foreign language	50	22	0	9	8	46	10	27	0	19	13	29	5	48	38	17	
Only domestic language	10	6	8	18	41	5	14	42	14	6	0	24	20	0	7	18	
No language training offered	20	6	1	15	36	24	38	23	8	71	61	54	29	62	19	21	37
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	
Count (n)	(10)	(18)	(26)	(11)	(211)	(39)	(122)	(26)	(14)	(190)	(24)	(17)	(61)	(27)	(42)	(838)	

Source: Programme Questionnaire

Question 1.7: Which of the following aspects are characteristics of the curriculum?

The country comparison, contained in Table 29, reveals some already familiar patterns. Amongst the top five countries providing the least language training are Sweden, the Netherlands and Norway (with 62%, 61% and 54% of programmes providing no such tuition at all). The top non-provider, though, is Lithuania. The countries which most frequently provide language training are Switzerland, where 92 percent of all programmes offer some sort of language instruction, followed by Switzerland (85%) and Turkey (81%). Countries which offer tuition in both English and the domestic language are led by Switzerland (77%), followed by Finland (53%).

5.7 Scholarships and tuition fees

The Programme Questionnaire enquired if “scholarships were available to students of the programme”. About two thirds of respondents stated that this was the case, as Table 30 shows. Scholarships are most common in Switzerland (96%), in the Netherlands (92%) and in Turkey (89%). In Finland (9%) and in the Czech Republic (45%), less than half of all English-medium programmes provide grants to their students. A comparison with the 2002 study shows that scholarship provision has risen since the last survey, when only 56 percent of programmes reported the availability of scholarships.

Table 30
Availability of scholarships for students on the programme
– by country (percentages)

	Country of university															Total
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other	
No	22	38	4	55	34	15	91	29	47	8	23	25	21	11	27	33
Yes	78	63	96	45	66	85	9	71	53	92	77	75	79	89	73	67
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
Count (n)	(9)	(16)	(27)	(11)	(199)	(34)	(120)	(24)	(15)	(179)	(26)	(16)	(57)	(27)	(41)	(801)

Source: Programme Questionnaire

Question 1.14: Are scholarships available to students of the Programme?

It must, however, be underlined that the above findings need to be treated with caution. The question was intended to find out if the programme itself or the university offering it had any scholarships to award. But it cannot be ruled out that many respondents referred to the availability of scholarships ‘as such’, for example from the government or specialised internationalisation bodies in the country. The question was also phrased in a way that no distinction could be made between the availability of scholarships – even from the programme or institution – and the *de facto* likelihood of obtaining a scholarship. Lastly, it is not certain if respondents always differentiated properly between scholarships and loans.

Overall, 70 percent of all English-taught programmes charge tuition fees. This is a considerable increase from 2002, when the majority of programmes (57%) charged no fees at all. Likewise, the number of countries where all or the vast majority of institutions charge fees has risen markedly: in seven of the countries in Table 31, all programmes charge fees, and in most other countries, around four fifths of all programmes do so. Only Europe’s north – Finland, Norway and Sweden – is still almost fee-free.

Table 31
Tuition fees – by country (percentages)

	Country of university																Total
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other		
No	0	0	0	0	19	5	98	0	0	0	84	19	95	4	12	30	
Yes	100	100	100	100	81	95	2	100	100	100	16	81	5	96	88	70	
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	
Count (n)	(10)	(18)	(25)	(10)	(206)	(44)	(123)	(26)	(15)	(189)	(25)	(16)	(61)	(27)	(42)	(837)	

Source: Programme Questionnaire

Question 1.16: Are students requested to pay tuition fees for the programme?

The fee amounts requested per year, excluding administrative fees (student union fees, insurances, etc.), differ enormously. They range from an almost symbolical amount of EUR 150 at the low end, to the princely sum of EUR 26,000 as the maximum. On average, the fee per year is about EUR 6,300 for foreign and EUR 3,400 for domestic students.

As Table 32 demonstrates, the highest average fee amount for foreign students is reported by Programme Directors from Denmark, with more than EUR 11,000, followed by the Netherlands and France with about EUR 8,000 on average. With only about EUR 2,000 on average, the tuition fees charged in Austria, Belgium and the Switzerland are at the lower end (see Table 32). It should be noted, though, that the ‘averages’ for Finland and Sweden are made up of one or two programmes only – and most likely from among the few that charge fees in these countries at all – and that they therefore do not give a representative picture of the countries’ fee policies.

Table 32
Average amount of tuition fees – by country (mean)

	Country of university																Total
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other		
Tuition fees for domestic/EU-students	1178	1021	1323	2926	4412	3200	6250	6667	2110	2281	4000	3720	2000	4094	5081	3367	
Count (n)	(9)	(18)	(23)	(7)	(162)	(1)	(1)	(24)	(12)	(181)	(3)	(10)	(1)	(23)	(30)	(505)	
Tuition fees for non-EU/international students	2056	2186	1671	3550	4964	11590	11400	7752	3568	8121	4000	3742	6000	4463	5672	6320	
Count (n)	(9)	(18)	(23)	(6)	(156)	(41)	(2)	(25)	(13)	(179)	(3)	(12)	(1)	(22)	(34)	(544)	

Source: Programme Questionnaire

Question 1.16: Are students requested to pay tuition fees for the programme?

There are some notable differences to the 2002 study. As already mentioned, 57 percent of all programmes charged no tuition fees at all at the time of the earlier study, whereas today, only 30 percent are tuition-free. This devel-

opment, however, is almost certainly due to an overall trend to tuition fees in European higher education, rather than a phenomenon peculiar of English-medium programmes.

Fee levels, however, have not risen remarkably. The average (for international students) of EUR 6,300 is only marginally higher than it was 2002, when it stood at EUR 6,000. The single highest fee identified than was EUR 32,000, and thus above the present 'peak' of EUR 26,000.

5.8 Regional origin of students

In order to figure out the geographical origin of students enrolled in English-taught programmes, the Programme Directors were asked to provide information on the total number of students in the academic year 2006/07 in one of two ways. Preferably, they should specify the number of students by country/region of origin. Alternatively, in case they were not able to do so, they were asked to differentiate only between domestic and international students. Unfortunately, only slightly more than one third of all respondents were able or willing to provide data on the country/region of origin of students. When interpreting the data obtained, these limitations must obviously be borne in mind. It is clear that, at best, the data can yield only rough indications for the geographical distribution of students in English-medium programmes.

Table 33
Home country/region of students in English-taught programmes in 2006/07 – by level of academic degree awarded (mean)

	Level of degree awarded			Total
	Bachelor	Master	Bachelor + Master	
Domestic students	53.4	29.8	72.5	35.0
European Union / EFTA	16.6	15.5	9.7	15.4
Other Europe	4.8	5.4	2.2	5.2
North America (excluding Mexico)	1.8	2.7	0.9	2.5
South America (including Mexico)	0.8	5.2	1.8	4.4
Africa	8.7	8.9	4.1	8.7
Near and Middle East	2.8	4.5	2.1	4.2
China	6.5	10.5	1.3	9.5
India	0.5	6.3	0.2	5.2
Asia (excluding China, India)	4.1	10.9	4.8	9.7
Australia and Oceania	0.0	0.4	0.4	0.4
Total	100.00	100.00	100.00	100.00
Count (n)	(50)	(279)	(14)	(343)

Source: Programme Questionnaire

Question 2.4: If data available, please state the number of students and graduates in the academic year 2006/07 for each region listed below. If numbers are not available, please estimate percentages.

On average, about 35 percent of all students enrolled in English-medium education are domestic students. In the 2002 study, their proportion was still higher, at 40 percent. There thus seems to be a growing trend towards international students, which now make up 65 percent of total enrolment. Table 33 also shows that, inclusive of domestic students, students with a European nationality form the largest contingent in English-medium programmes, in fact the majority (about 56%).

Table 33 also reveals that the regional origin of students enrolled in English-taught programmes differs to a certain extent between the levels of degrees awarded. The proportion of domestic students is considerably higher in first-cycle programmes (53% as compared to 30% in second-cycle programmes). In contrast to this, the share of international first-cycle students from South America is very low (about 1% compared to about 5%), as is the share from Asia, i.e. inclusive of India and China (about 11% compared to about 27%).

Table 34
Home country/region of international students in English-taught programmes 2006/07 – by country (mean of percentages)

	Country of university																Total
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other		
European Union / EFTA	41	20	8	50	16	60	24	31	39	44	17	38	32	13	36	27	
Other Europe	0	5	10	25	7	11	9	19	27	9	21	0	6	7	16	9	
North America (excluding Mexico)	3	1	3	0	4	13	5	11	0	5	2	2	4	6	11	5	
South America (including Mexico)	21	16	18	0	10	0	3	2	33	5	5	2	3	0	7	6	
Africa	4	25	13	14	9	6	20	0	0	9	20	35	10	1	7	12	
Near and Middle East	4	2	18	0	10	0	3	1	0	3	4	0	5	33	5	6	
China	5	12	5	0	14	8	17	19	0	11	7	21	19	3	4	13	
India	21	3	0	0	12	0	5	5	0	3	2	0	6	0	3	7	
Asia (excluding China, India)	3	16	24	11	16	1	13	12	1	10	22	2	16	36	11	14	
Australia and Oceania	0	0	0	0	1	2	0	0	0	1	1	0	1	0	1	1	
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	
Count (n)	(3)	(11)	(2)	(2)	(110)	(10)	(57)	(10)	(3)	(58)	(13)	(4)	(21)	(6)	(17)	(327)	

Source: Programme Questionnaire

Question 2.4: If data available, please state the number of students and graduates in the academic year 2006/07 for each region listed below. If numbers are not available, please estimate percentages.

Table 34 presents the origin of the sub-group of international students only. It should be noted that only 327 Programme Directors provided information on the country or region of origin of students, so that anything beyond an analy-

sis of the European average would be very bold. On a European average, of all international students in English-medium programmes,

- 27 percent come from European Union and EFTA countries,
- 9 percent come from other European countries,
- 34 percent come from Asia, (or, to be precise, 13% from China, 7% from India, and 14% from other Asian countries),
- 12 percent come from Africa,
- 6 percent come from the Near and Middle East,
- 5 percent come from North America,
- 6 percent come from Latin America, and
- 1 percent come from Australia and Oceania.

Thus, the group of international students from Europe forms the largest continental group (36%), followed closely by Asians (34%). Africa comes third, with 12 percent. The Americas play only a minor role, with 11 percent. The Near and Middle East, and especially Australia/Oceania, provide only *quantités négligables* of international students (6% and 1% respectively). Leaving aside Europeans, the overwhelming majority of students comes from developing or emerging economies, where demand for (quality) higher education is rising, but where higher education supply is insufficient.

For a number of reasons, it is not easy to compare these data to those of the 2002 study. The problem concerns the data for European students. The European countries covered by the two surveys were not identical (compare Chapter 2), and the European Union underwent an enlargement from 15 to 27 member states since the first study. Nevertheless, some rough trends can be identified. As already stated, the share of domestic students of all students has fallen (from 40% to 35%) and, as a result, the proportion of international students has risen (from 60% to 65%).

Within the group of international students in the sample,

- the share of non-domestic Europeans has slightly declined, from 39 percent in 2002, to 36 percent in the present study;
- the share of non-Europeans among international students has risen, from 61 percent in 2002 to 64 percent in the present study;
- the share of Asians among international students has risen from 29 percent in 2002, to 34 percent now. Within this group, interestingly, the share of Chinese students slightly fell (from 14% to 13%), whereas the proportion of Indians increased (4% to 7%), as did the group of 'other' Asians (from 11% to 14%);
- the share of Africans among international students has slightly decreased, from 14 to 12 percent;
- the share of students from the Americas among international students remained almost stable (10% in 2002, 11% today); and
- the share of Martians and inhabitants of outer space has remained stable, at 0 percent.

6 Introduction and operation of English-taught programmes

The previous chapter provided an in-depth description of English-medium programme provision in Europe. The present one deals with a number of issues which are of critical importance in the introduction and the operation of such programmes. Questions addressed in this chapter are, amongst others, the following ones: Why do higher education institutions offer programmes taught in English? Who are the main actors in the introduction and running of English-taught programmes, that is, who are 'drivers'? How are these programmes marketed? Are there any serious language problems on the side of the students and teachers, both in English and in the domestic language? And what do institutions do to cope with these? How attractive are English-medium programmes to students, e.g. is there sufficient demand? How are English-taught programmes accredited and quality-assured? Are there any problems arising from heterogeneous levels of prior knowledge of students? Which services – in terms of assistance and advice – do programmes provide for international students? And which side effects and spin-offs do English-medium programmes produce?

6.1 Motivation

In both the Institutional and the Programme Survey, addressees were asked to state the relative importance of nine different reasons for the introduction of English-taught programmes. As Chart 1 shows, three motives are of outstanding importance for both central-level actors and Programme Directors in the faculties and departments. These are

- to attract international students who would not enrol in a programme taught in the domestic language (84% of Institutional Coordinators and 81% of Programme Directors);
- to make domestic students 'fit' for global or international labour markets (84% and 75%); and
- to sharpen the profile of the institution in comparison to others in the country (77% and 75%).

It is interesting to note that the top two answers in the present surveys were also top-ranked in the 2002 study, with similar percentage values.

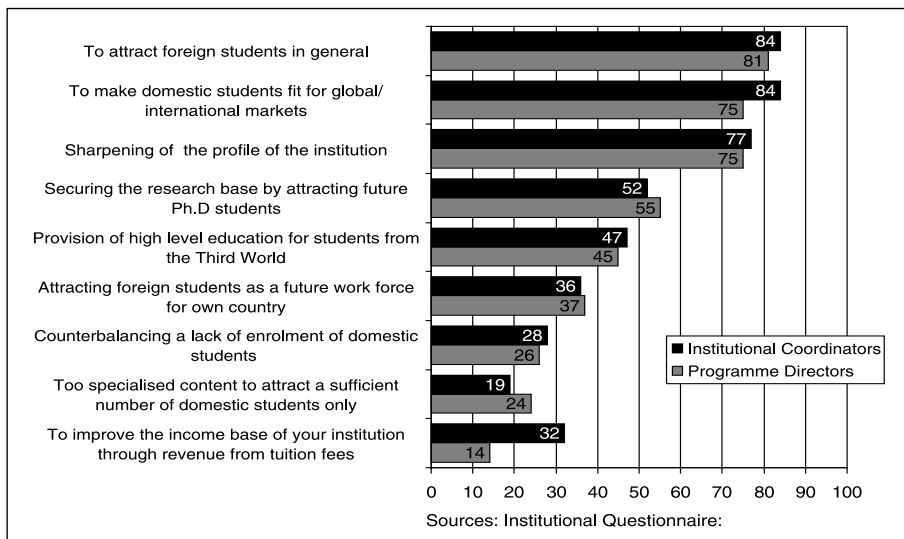
The high values for the second most often stated reason to make domestic students 'fit for the global market' appear somewhat astonishing, given that only 35 percent of all students enrolled in English-medium programmes are of domestic origin (see Chapter 5). These values could be due to responses mainly from first-cycle programmes, which enrol a majority of domestic students. But they could also indicate that institutions and programmes intend to attract more domestic students than they actually do. This hypothesis gets some support from the fact that both Institutional Coordinators and Pro-

gramme Directors more often report difficulties in attracting domestic rather than international students (see Chapter 6.5).

The number four motive for introducing English-medium provision is “to secure the research base by attracting future PhD students” (52% and 55%). This value is surprisingly high in view of the fact that only the sub-group of PhD-awarding institutions could state this reason (49% of institutions in the Institutional Survey). The motive therefore plays a much bigger role for research-oriented universities.

The ‘altruistic motive’ of providing high-level education for students from developing countries, in the fifth place, still plays an astoundingly strong role (47% and 45%). The remaining motives are of lesser importance, which comes as a surprise in the case of the ‘economic’ motivation to generate fee income (32% and 14%). It stands in some contrast to the fact that 70 percent of all English-taught programmes charge tuition fees (see Chapter 5.7). Institutional Coordinators, though, state this reason much more frequently than Programme Directors.

Chart 1
Important reasons for the introduction of English-taught programmes – by type of respondent (percentages*)



Sources:
 Institutional Questionnaire:
 Question 3.1: How important were the following reasons for your institution to implement English-taught programmes?
 Programme Questionnaire:
 Question 3.1: How important were the following reasons for the decision about the implementation of the programme?
 * Points 1 and 2 on a scale from 1 = “very important” to 5 = “not important at all”

It is also noteworthy that the offer of English-taught programmes hardly serves to counterbalance the effects of a lack of domestic enrolment (28% and 26%). One is tempted to conclude from this that the adverse effects of Europe's declining demography (in most countries) have not yet reached higher education institutions.

The motives determining the introduction of English-medium education partly differ between the Bachelor and the Master level, as the answers of Programme Directors reveal (see Table 35). The three top-ranked motives are the same for both groups, but the order is different. The number one motive for Bachelor programmes, 'to make domestic students fit for the international labour markets', is only ranked third in Master programmes. This can be partly explained by the fact that the share of domestic students in Bachelor programmes is almost twice as high as in Master programmes. What does not come as a surprise is that the objective to secure the future supply of PhD candidates is much more important in Master programmes (57% and rank 4 in Master programmes; 37% and rank 6 in Bachelor programmes).

Table 35
Important reasons for the introduction of English-taught programmes – by level of academic degree awarded (percentages*)

	Course type/level of study			Total
	Bachelor	Master	Bachelor + Master	
To sharpen the profile of your institution in comparison to other institutions in your own country	71	75	97	75
To counterbalance a lack of enrolment of domestic students in certain subject areas	19	27	23	26
To attract foreign students who would not enrol in a programme taught in the domestic language	80	83	56	81
To secure the research base of your institution by attracting future PhD. students	37	57	69	55
To attract foreign students as a future highly qualified work force for your country	38	37	26	37
To provide high level education for students from the Third World as a possible mean of development aid	39	46	38	45
To make domestic students fit for global/ international markets	88	72	87	75
To improve the income base of your institution through revenue from tuition fees paid by foreign students	26	11	20	14
The content of the programme is too specialised to attract a sufficient number of domestic students only	17	26	21	24
Count (n)	(107)	(561)	(31)	(699)

Source: Programme Questionnaire

Question 3.1: How important were the following reasons for the decision about the implementation of the programme?

6.2 Actors and approaches

Like its predecessor, the present study tries to identify the drivers behind the introduction of English-medium programmes. Who, from among the various academic and administrative actors in a higher education institution, are the main supporters? Does the initiative come mainly from the ‘academic base’, i.e. from the faculties and departments? Or are they being introduced in a top-down way, by the university leadership? Table 36 provides (multiple) answers to these questions.

Table 36
Important promoters of English-taught programmes – by country
(percentages*)

	Country of university															Total
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other	
Head of international relations or central administrative unit in charge of international activities	67	67	40	93	69	100	75	97	100	76	64	85	30	62	78	77
Dean of faculty/department	75	67	40	71	83	77	87	82	58	80	69	81	78	86	73	77
President/ rector/ vice-president/ vice-rector etc.	56	67	60	80	74	88	65	86	67	71	53	93	64	79	82	76
Individual academic staff members within the faculty/department	63	44	80	57	96	53	75	75	36	50	87	61	82	71	70	71
Staff especially in charge of international activities at the departmental level	63	78	0	73	77	91	87	76	45	65	67	73	78	55	62	70
Central committee in charge of international activities	20	20	25	45	38	78	45	75	75	33	38	73	33	58	62	52
Committee in charge of international activities at the departmental level	29	40	0	55	44	56	37	83	38	47	57	60	50	45	57	51
Student associations, individual students	13	0	0	27	17	25	22	19	36	20	29	37	20	29	43	27
Count (n)	(9)	(9)	(6)	(15)	(59)	(16)	(32)	(30)	(13)	(21)	(15)	(32)	(11)	(15)	(80)	(363)

Source: Institutional Questionnaire

Question 3.2: Which role did the following actors play as promoters of English-taught programmes?

* Points 1 and 2 on a scale from 1 = “very important role” to 5 = “no role at all”

According to the answers received, the initiative and support for the introduction of English-taught programmes are derived from the following:

- 77 percent attributed the effort to the head of the central administrative unit in charge of international activities (international office);
- 77 percent identified the deans of faculties and departments as important promoters;
- 76 percent held the president, rector, vice-president or vice-rector to be crucial;
- 71 percent thought likewise of academic staff members at faculty and department level;
- 70 percent of higher education institutions mentioned staff members with a particular responsibility for international activities at the departmental level as important promoters;
- 52 percent mentioned a central committee in charge of international activities;
- 51 percent referred to a departmental committee in charge of international activities;
- 27 percent named student associations or individual students.

The above results appear to indicate that actors at the faculty and department level are more or less equally often those who push the creation of English-medium provision. This finding differs only slightly from that of the 2002 study, which identified the faculties and departments as the slightly more frequent initiators. As was the case in the 2002 study, the development is mostly driven by persons, and less often by bodies (committees). Administrators and academics also seem to be equally often involved. Students, and their representative bodies, are at the bottom of the list. This was also the case in 2002, but the percentage value has gone up noticeably (from 16% to 27%).

In more than three quarters of all institutions, English-taught programmes are the result of an interaction between persons from both the central and the faculty/department level. An exclusive role of central-level actors can be found in only six percent of all institutions. The share of institutions where only department-level actors were responsible for the introduction of English-medium programmes is also relatively small (12%).

There are considerable differences between countries, but it is not easy to interpret them in terms of consistent 'country patterns'. In one of the two categories with the highest overall support rating, i.e. the central-level heads of international relations offices, support rates range from 100 percent in Denmark and Lithuania to a mere 30 percent in Sweden. In the other top category, the one composed of faculty deans and department heads, the highest support values are found in Finland (87%), Turkey (86%) and Germany (83%), and the lowest in Switzerland (40%). Rectors and vice-rectors are most supportive in Poland (93%); they play the least important role in

Switzerland (60%). Individual staff members are most frequently the drivers in Germany (96%), Norway (87%) and Sweden (82%), and least often in Belgium (44%) and Lithuania (36%). International administrators at faculty and department level were most often reported as supportive by Danish and Finnish institutions (91% and 87% respectively). Against the overall trend, committees play a considerable role in French, Danish and Polish institutions. For two reasons, the results of the above country comparison must be treated with caution, however. First, the samples in some countries are very small – for example in Switzerland. Second, overall support rates (across all categories) vary considerably between countries. Bearing this in mind, it is still safe to conclude that both German and Norwegian institutions in the sample follow a grass-roots approach, where individual academics and the heads of academic units (faculties, departments) are the main drivers of English-medium programmes.

It must be stressed that the above findings only render account of the support among the various categories, but say nothing about resistance against the introduction of English-medium programmes within the institutions. In the case of the 2002 study, additional site visits shed some light on the issue of resistance, which was found to be astonishingly low and concentrated among older teaching staff uncomfortable with teaching in English. The present study, in which no such site visits were made, cannot present any evidence if this is still so – even though the substantial growth of English-medium provision would appear to indicate this.

6.3 Marketing

Almost all Programme Directors report marketing activities with the aim to attract students into their English-taught programmes. International students are the primary target group. 19 percent of all programmes target them exclusively, whereas 67 percent state to seek them alongside domestic students. Only four percent of all programmes focus their promotion activities exclusively on domestic students. As Table 37 shows, second-cycle programmes are slightly more active in marketing than Bachelor programmes, and more often target international students. Only every tenth programme does not carry out any marketing activities at all.

The above data suggest that marketing has substantially increased in the last five years. In the 2002 study, 43 percent of Programme Directors reported marketing activities aimed at both domestic and international students (against 67% today). Almost one quarter of all programmes (23%) did not engage in any promotion at that time. These findings are not surprising, given that governments and specialised agencies in the countries most active in the provision of English-medium education have mounted major national-level marketing campaigns, which entail encouragement and capacity-building (training) measures for institutions to market their educational offers.

Table 37
Target groups of special marketing activities – by level of academic degree awarded (percentages)

	Course type/level of study			Total
	Bachelor	Master	Bachelor + Master	
Foreign and domestic students	63	67	64	67
Only foreign students	14	21	3	19
Only domestic students	8	3	15	4
None at all	15	10	18	11
Total	100	100	100	100
Count (n)	(109)	(595)	(33)	(737)

Source: Programme Questionnaire

Question 4.1: Do you conduct any special marketing activities in order to attract foreign or domestic students to the programme?

A comparison by country (Table 38) shows that the development of a marketing culture has not progressed in the same way everywhere.

Table 38
Target groups of special marketing activities – by country (percentages)

	Country of university															Total
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other	
Foreign and domestic students	63	67	92	50	68	45	67	59	56	84	57	50	52	23	69	67
Only foreign students	13	17	4	13	22	38	20	27	19	13	4	21	29	5	11	19
Only domestic students	0	6	0	0	2	5	2	9	13	1	13	14	2	32	6	4
None at all	25	11	4	38	8	12	11	5	13	3	26	14	17	41	14	11
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
Count (n)	(8)	(18)	(24)	(8)	(191)	(42)	(109)	(22)	(16)	(152)	(23)	(14)	(52)	(22)	(36)	(737)

Source: Programme Questionnaire

Question 4.1: Do you conduct any special marketing activities in order to attract foreign or domestic students to the programme?

Turkish programmes are marketed less often than those of any other country, with a share of institutions with no marketing activities whatsoever being up at 41 percent. Less than a quarter of Turkish respondents state to carry out marketing activities aimed at both Bachelor and Master students. However, Turkish providers promote their programmes more than those of any other European country vis-à-vis a domestic target audience. Czech and, to a les-

ser extent, Norwegian and Austrian programmes are also comparatively promotion-averse. Swiss and Dutch programmes in the sample are most active in marketing, at any rate measured by activities addressing both domestic and international target groups (92% and 84%).

Table 39 gives an overview of the kinds of marketing measures employed. Accordingly, of all Programme Directors asked

- 87 percent mention to provide information via the internet;
- 80 percent provide information material, brochures etc.;
- 74 percent use networks and partner institutions;
- 67 percent organise information events at the own institution or in the home country;
- 62 percent present the programme at student fairs, conferences etc. abroad;
- 44 percent strive to include their English-medium offers in programme guidelines of national exchange agencies or other national overviews;
- 43 percent advertise in newspapers or other public media;
- 16 employ/use agents in target countries; and
- 7 percent state other means.

Table 39
Marketing activities and strategies introduced – by level of academic degree awarded (percentages, multiple replies possible)

	Course type/level of study			Total
	Bachelor	Master	Bachelor + Master	
No special marketing activities conducted	15	9	18	11
Provision of information via the internet/ web sites	84	89	73	87
Production and distribution of printed information material/ brochures etc.	78	81	70	80
Distribution of information via existing networks/ partnerships of the university	70	75	76	74
Information events in the home country/ home university	72	66	79	67
Information events abroad, i.e. student fairs, conferences etc.	63	64	36	62
Entry in programme overviews of national promotion agencies	28	48	30	44
Advertisements in newspapers/ public media	51	42	42	43
Employment/ use of agents in target countries	28	14	3	16
Other marketing activities	10	6	6	7
Total	500	494	433	492
Count (n)	(109)	(607)	(33)	(749)

Source: Programme Questionnaire

Question 4.2: Which kind of marketing activities or strategies do you use?

These results confirm the finding that promotional activity has substantially increased over the last five years. The percentage value for every single measure has markedly increased since 2002. Thus, the value for the number one measure (promotion via the internet) more than doubled, from 42 per cent of all respondents to 87 per cent. The value for the second most often reported approach, the use of printed promotional material, skyrocketed from 16 to 80 per cent. The value for the number five activity, the participation in education fairs abroad, increased from 22 to 62 per cent. So did parallel information events at the domestic front (67%, up from 21%).

The comparison with the findings of the 2002 study further reveals that the hierarchy of the individual activities has not changed significantly. Thus, the internet was already in 2002 the top dissemination instrument for promotional messages. The same goes for the multi-instrument approach which most institutions apply. What has changed is not the promotional means employed, but the degree (level) of their use.

A comparison of marketing activities by cycles shows only marginal differences with regard to most instruments (see Table 39). Only the entry in programme overviews of national promotion agencies is significantly more often mentioned by directors of Master-level programmes (48% compared to 28%).

It must be stressed that the strong quantitative growth in marketing activities does not allow the authors to assess in any way the effectiveness and adequacy of the measures taken. In the course of the 2002 study, where site visits were part of the methodology, it was found that marketing was often too unfocused to achieve the intended results. Programmes complained that they attracted the 'wrong' students – in terms of nationalities and qualification, for example. It turned out that this was partly the result of an imprecise communication strategy. The institutions had not clearly conveyed which students they intended to attract, and they had not specifically targeted their promotion efforts at those countries and regions from where they wanted to recruit. It is to be hoped that the learning experiences of past years and the help from specialised national agencies in the field of promotion have led to more adequate and targeted measures. The present study, however, did not collect any evidence on this matter.

6.4 Language proficiency of students and teachers

When English-medium education in non-English-speaking countries first became a matter of academic attention around the turn of the century, a very controversial debate set in. It concentrated on the quality of learning outcomes, which critics maintained was in danger. Concerns were raised that the class-room reality of English-taught programmes was marked by teachers who could not properly express themselves in English and students who were unable to understand. At its height, the dispute displayed all signs of

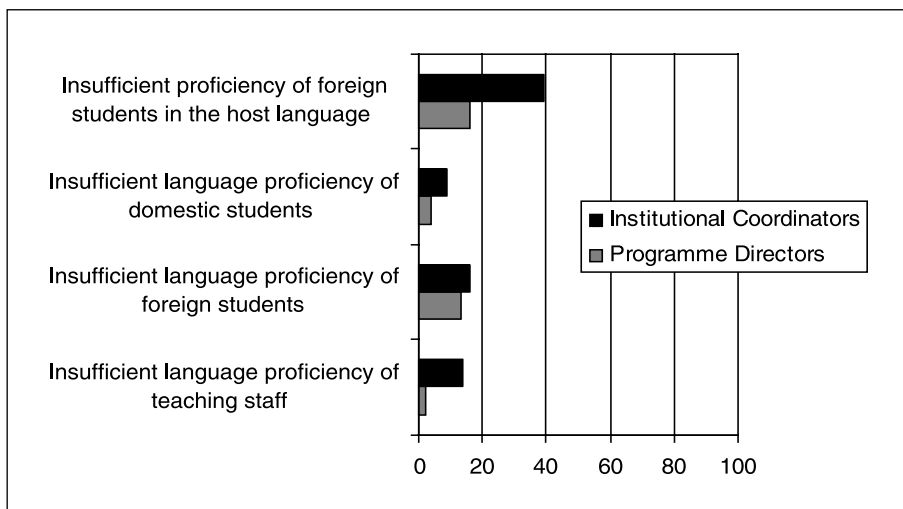
religious warfare. The discussion appears to have calmed down considerably, but the issue of language mastery is still on the agenda.

The 2002 study found that there were indeed language issues to be addressed. But it did not confirm that they were quite as serious as the critics of this form of delivery maintained. Moreover, it identified the most notable problems in an area not much debated until then: the mastery (or rather the lack of mastery) of the domestic language of the host country of international students. How has the situation developed in the past five years? Both the Institutional and the Programme Survey tried to shed light on this matter.

6.4.1 Students

Institutional Coordinators and Programme Directors were asked to indicate the relative importance of language-related problems of students and teachers in English-taught programmes by using a scale from 1 to 5 (1 = no problem at all, 5 = a very serious problem). Chart 2 displays the percentages of answers indicating scale points 4 and 5, i.e. “a serious/a very serious problem”.

Chart 2
Significant problems encountered with language proficiency



Sources:

Institutional Questionnaire:

Extract from Question 3.3: Did your institution encounter significant difficulties in any of the following areas with regard to the implementation of the English-taught programme(s)?

Programme Questionnaire:

Extract from Question 4.5: Did you encounter significant difficulties in any of the following areas with regard to the implementation and running of the programme?

* Points 4 and 5 on a scale from 1 = “no problems at all” to 5 = “very serious problems”

By and large, difficulties with the command of English of both domestic students and international students appear to be on a rather low level, while problems international students have with the domestic language are more frequent in the view of respondents.

As Chart 2 shows, Institutional Coordinators more often perceive significant language (and other) problems than Programme Directors. But problems with English are rather infrequently classified as significant. They play the least role in the case of the command of English of domestic students, but they are also not very frequent with international students. The really worrying perception is that which Institutional Coordinators have of the domestic-language proficiency of international students.

A comparison with the data from our earlier study is only partly legitimate. First, the 2002 surveys addressed only the Programme Directors with this set of questions. Second, the countries surveyed in both studies are not identical, as explained earlier. Third, the 2002 survey included mixed-language programmes, in which a command of the domestic language was also necessary in the classroom. With these limitations in mind, it should still be mentioned that the percentage of Programme Directors who identified significant problems with regard to all three questions has gone down. The most often stated problem in both studies, the proficiency of international students with the host-country language, went down from 39 to 16 percent. The percentage value for the second most important problem in 2002 and today, the mastery of English of international students, went down from 21 to 13 percent. And the frequency of the least-often perceived problem in both surveys, an insufficient mastery of English of domestic students, decreased from eight to four percent.

The perception of students' language problems varies considerably between countries, as Table 40 illustrates. Problems with the mastery of the domestic language are most frequently mentioned by Lithuanian Institutional Coordinators (70%) and Programme Directors (36%) and least frequently by Institutional Coordinators in Sweden (17%) and Programme Directors in Poland and Belgium (both 0%). As in Europe as a whole, Institutional Coordinator in each single country mention students' domestic-language problems more often than Programme Directors, with the exception of Denmark (25% Institutional Coordinators, 36% Programme Directors).

An insufficient English-language proficiency of international students is most-often perceived by Institutional Coordinators in Denmark (33%), Poland (32%) and Belgium (29%), and least frequently in Austria, Lithuania and the Czech Republic (all 0%). Among Programme Directors, the highest percentage values in this regard are found in Poland, Belgium (both 20%) and in Sweden (19%). The European-wide phenomenon that Institutional Coordinators more often than Programme Directors identify significant problems is repeated at the level of individual countries, with the exception of Norway

and Sweden, where the problem is more frequently perceived at the programme level.

The least often reported problem on a European average, deficits in the mastery of English of domestic students, is most frequently reported by Institutional Coordinators in Turkey (21%), Poland (19%), the Czech Republic (15%) and Belgium (14%). In six countries, no single Institutional Coordinator mentioned this problem. In line with the European average, Programme Directors much less frequently identify this problem. It is most often mentioned in France, where, against the Europe-wide tendency, Programme Directors much more often see problems (30%) than Institutional Coordinators (11%).

Table 40
Significant difficulties encountered in the introduction of English-taught programmes – by country (percentages*)

	Country of university																Total
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other		
Insufficient proficiency of foreign students in the domestic language at your institution																	
ERASMUS																	
Coordinator		33	40	50	36	44	25	32	33	70	40	25	40	17	23	43	39
Programme Directors		20	0	9	20	19	36	14	32	36	8	5	0	9	18	26	16
Insufficient language proficiency of domestic students																	
ERASMUS																	
Coordinator		0	14	0	15	8	0	0	11	8	10	0	19	0	21	11	9
Programme Directors		0	0	4	0	2	0	1	30	0	3	0	0	0	19	23	4
Insufficient language proficiency of foreign students																	
ERASMUS																	
Coordinator		0	29	25	7	11	33	19	11	8	27	7	32	18	8	15	16
Programme Directors		0	20	17	0	9	10	16	5	0	13	27	20	19	11	10	13
Insufficient language proficiency of teaching staff																	
ERASMUS																	
Coordinator		0	14	0	40	7	0	6	21	8	27	7	14	9	7	20	14
Programme Directors		0	0	0	0	2	0	2	0	0	2	0	9	0	5	0	2
Count (n)		(9)	(9)	(5)	(15)	(57)	(16)	(32)	(29)	(13)	(22)	(15)	(32)	(12)	(15)	(79)	(360)

Sources:

Institutional Questionnaire:

Extract from Question 3.3: Did your institution encounter significant difficulties in any of the following areas with regard to the implementation of the English-taught programme(s)?

Programme Questionnaire:

Extract from Question 4.5: Did you encounter significant difficulties in any of the following areas with regard to the implementation and running of the programme?

* Points 4 and 5 on a scale from 1 = "no problems at all" to 5 = "very serious problems"

The French finding is consistent with that of the 2002 study, when Programme Directors in France complained more often than those from any other country about their own (French) students' problems with the English language.

In interpreting the above finding – on all three problem categories – caution is necessary. The answers to these language-related questions are linked to expectations, and it is by no means certain that the levels of expectation – and the standards applied – are the same across Europe, and that there is a shared view of what constitutes a “significant” language problem. By and large, however, the findings of the present surveys strongly suggest that the conclusion of the 2002 study still applies, which found that significant language problems of students – particularly with regard to English – were much less frequent and serious as an at times hysterical discussion made them appear. If anything, these problems have diminished over the past five years. Why that is so is less clear. But it is not to be ruled out that institutions over time get more used to the imperfections of communication in an international classroom, which they may first have found highly irritating.

Which efforts do higher education institutions in Europe make to support students with language problems? This issue was addressed in the Programme Survey. The picture emerging from the responses is that a considerable proportion of English-medium programmes contain language training elements as an integral part of the curriculum. As Table 41 shows, overall, only slightly over one third of all responding programmes include no language training element at all (37%). 45 percent offer support for the improvement of the command of the domestic language, and 44 percent offer help with English. Language training is more often a characteristic of first-cycle programmes: 75 percent of Bachelor-level programmes offer training in English and 57 percent in the domestic language, compared to 37 percent and 43 percent of second-cycle programmes.

Table 41
Offer of language training – by level of academic degree awarded (percentages)

	Course type/level of study			Total
	Bachelor	Master	Bachelor + Master	
English and domestic language	47	23	36	27
Only English language	28	14	31	17
Only domestic language	10	20	14	18
No language training offered	15	43	19	37
Total	100	100	100	100
Count (n)	(134)	(668)	(36)	(838)

Source: Programme Questionnaire

Question 1.7: Which of the following aspects are characteristics of the curriculum?

A comparison with the answers to the same question in 2002 reveals no clear tendency. The share of programmes offering no language-training elements has gone up, from 26 percent to 37 percent. The proportion of those offering support with the mastery of the domestic language went up, from 40 to 44 percent. The share of programmes offering language training in English, however, went down, from 56 to 44 percent. Of course, it must be pointed out again that the samples – in terms of countries and types of English-taught programmes included – were not the same in the two studies.

In 2002, when the methodology applied included site visits, there were some doubts if the answers to the above question gave an adequate picture of the reality in English-taught programmes in Europe. Then, as in the present study, the question was if language-training was offered as part of the curriculum. The site visits revealed that, in many cases, the question was interpreted less specifically. Often, respondents answered as though it meant whether the institution offered any language training, for example as part of an offer for all of its students. Since capacities in these language classes were often severely limited, it appeared that not every student who wanted such training could actually get it. Whether this finding still applies today, and whether the above answers therefore paint the reality of language-training offers in a too rosy light, the authors cannot say.

6.4.2 Teachers

As Chart 2 shows, language problems of teachers are quite rarely identified. 14 percent of all Institutional Coordinators and only two percent of Programme Directors see such problems. Even though both groups thus perceive language problems of teachers rather rarely, the fact that Institutional Coordinators see such problems seven times more frequently than Programme Directors is striking. As Table 40 displays, there are some differences between countries, especially among Institutional Coordinators. 40 percent of Institutional Coordinators from the Czech Republic identify serious language problems of teaching staff. The percentage values in the Netherlands (27%) and in France (21%) are also above the European average. In contrast to this, Institutional Coordinators in Austria, Switzerland and Denmark perceive no problems at all. Among Programme Directors, only Polish (9%) and Turkish respondents (5%) report above-average values.

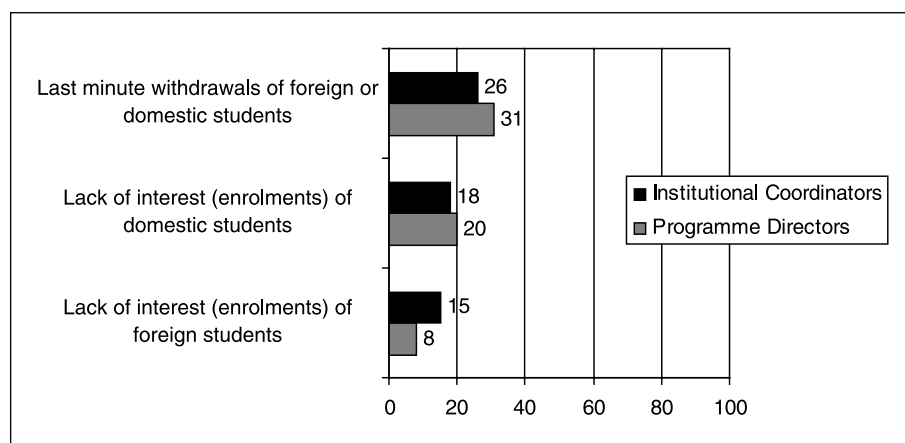
In 2002, the percentage of Institutional Coordinators that identified significant problems in the English-language proficiency of teaching staff was exactly the same. The 2002 survey did not address this question to the Programme Directors.

6.5 Attractiveness of programmes for students

Respondents were asked to state how serious the difficulties encountered in attracting students were. Specifically, they were to indicate the seriousness

of the following problems: (1) last-minute withdrawals of students (both domestic and international), (2) lack of interest (enrolments) of foreign students, and (3) lack of interest (enrolments) of domestic students.

Chart 3
Problems related to student demand



Sources:

Institutional Questionnaire:

Extract from Question 3.3: Did your institution encounter significant difficulties in any of the following areas with regard to the implementation of the English-taught programme(s)?

Programme Questionnaire:

Extract from Question 4.5: Did you encounter significant difficulties in any of the following areas with regard to the implementation and running of the programme?

* Points 4 and 5 on a scale from 1 = "no problems at all" to 5 = "very serious problems"

As Chart 3 shows, the most-often stated problem is that of last-minute withdrawals, i.e. of students who were offered a place and gave late notification that they would not take up the offer. 26 percent of all Institutional Coordinators classify this as a significant problem, and 31 percent of all Programme Directors think likewise. The problem number two is a lack of interest, among domestic students, expressed in terms of low enrolments, with values of 18 percent among Institutional Coordinators, and 20 percent among Programme Directors. A lack of interest on the part of foreign students is a problem in fewer cases. 15 percent of all Institutional Coordinators mention this difficulty, and only eight percent of all Programme Directors. The hierarchy of these three problems was the same in the 2002 study.

Again, the picture differs by country, as Table 42 reveals. Concerning the top-ranked of the three problems, last-minute withdrawals, Swedish and Finnish Institutional Coordinators mention this problem highly frequently (73% and

Table 42
Significant difficulties encountered in the introduction of English-taught programmes – by country (percentages*)

	Country of university																Total
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other		
Last minute withdrawals of foreign or domestic students																	
ERASMUS																	
Coordinator	38	17	33	17	24	14	42	21	40	33	20	17	73	10	22	26	
Programme Directors	20	7	57	29	26	44	36	24	0	32	24	18	48	11	23	31	
Lack of interest (enrolments) of domestic students																	
ERASMUS																	
Coordinator	25	14	0	7	23	13	29	12	31	5	14	19	64	0	14	18	
Programme Directors	17	13	26	0	23	7	24	19	0	7	27	18	60	0	10	20	
Lack of interest (enrolments) of foreign students																	
ERASMUS																	
Coordinator	0	14	0	13	7	13	13	16	23	9	20	39	0	17	18	15	
Programme Directors	17	7	22	14	2	7	12	0	8	7	0	10	10	24	29	8	
Count (n)	(9)	(9)	(5)	(15)	(57)	(16)	(32)	(29)	(13)	(22)	(15)	(32)	(12)	(15)	(79)	(360)	

Sources:

Institutional Questionnaire:

Extract from Question 3.3: Did your institution encounter significant difficulties in any of the following areas with regard to the implementation of the English-taught programme(s)?

Programme Questionnaire:

Extract from Question 4.5: Did you encounter significant difficulties in any of the following areas with regard to the implementation and running of the programme?

* Points 4 and 5 on a scale from 1 = "no problems at all" to 5 = "very serious problems"

42%). This is partly reflected at the level of the Programme Directors, with those from Sweden again leading the table (48%). Interestingly, this pattern is repeated in the case of the second-ranked difficulty – a lack of interest of domestic students. Swedish institutions suffer far more often from this than those from other countries (64% of the Institutional Coordinators, 60% of the Programme Directors), followed by Finnish universities and colleges (29% of the Institutional Coordinators, 24% of the Programme Directors). Differences are much less pronounced with regard to the third problem, a lack of enrolment of foreign students.

6.6 Accreditation and quality assurance

Quality assurance (QA) and accreditation were still in their early stages in 2002, when the predecessor study was published. They have, in the past five

years, become standard features in European higher education, not least because of the importance accorded to them in the Bologna Process. What is the picture with regard to accreditation and quality assurance in English-medium education?

Accreditation is indeed widespread in the countries covered by this study, as Table 43 displays. Over two thirds of all Programme Directors (71%) report that their programme is accredited by some body at the domestic or international level. Although accreditation is mainly sought from and accorded by national bodies (66%), a considerable minority of programmes (16%) reports accreditation by foreign agencies. There are no significant differences between the levels of accreditation in first and second-cycle programmes. It is not to be excluded that these findings slightly overstate the level of accreditation in English-medium programmes, because the question asked – in the present study as in the 2002 predecessor – was if programmes had obtained or would in the future seek to obtain accreditation.

Table 43
Accreditation of English-taught programmes – by level of academic degree awarded (percentages)

	Course type/level of study			Total
	Bachelor	Master	Bachelor + Master	
National and international body	10	11	16	11
Only national body	60	54	56	55
Only international body	4	6	3	5
No accreditation intended	27	29	25	29
Total	100	100	100	100
Count (n)	(113)	(609)	(32)	(754)

Source: Programme Questionnaire

Question 4.3: Which of the following means of accreditation and quality assurance are applied or will be applied to the programme?

A comparison with the answers obtained in 2002 shows no major changes in the Europe-wide levels of accreditation.

The country comparison displays considerable differences (Table 44). Programmes with no accreditation at all are the dominant feature in Finland and Switzerland, with a share of 85 and 83 percent respectively, and they also form the majority in Sweden (65%). Programmes with no accreditation are least frequently reported from the Netherlands and Germany (3% and 8%). Since the main 'no-accreditation' countries were already covered by the 2002 surveys, it can safely be concluded that the non-growth in accreditation across Europe is not due to the inclusion of new countries in the 2007 surveys.

Table 44
Accreditation of English-taught programmes – by country (percentages)

	Country of university															Total
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other	
National and international body	0	18	8	0	8	16	0	17	20	19	4	13	9	14	11	11
Only national body	38	65	8	88	82	65	14	43	40	65	70	40	24	52	56	55
Only international body	25	0	0	0	2	0	1	22	7	13	0	7	2	5	3	5
No accreditation intended	38	18	83	13	8	19	85	17	33	3	26	40	65	29	31	29
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
Count (n)	(8)	(17)	(24)	(8)	(186)	(43)	(104)	(23)	(15)	(177)	(23)	(15)	(54)	(21)	(36)	(754)

Source: Programme Questionnaire

Question 4.3: Which of the following means of accreditation and quality assurance are applied or will be applied to the programme?

Using as a measure accreditation awarded by national and international bodies (or both), the most 'highly accredited countries' are the Netherlands and Germany, with percentage values of 97 and 92 respectively. Programmes accredited only by national bodies are the rule in the Czech Republic (88%) and in Germany (82%). They are also very common in Norway (70%), Belgium, the Netherlands and Denmark (all 65%). Exclusively foreign accreditation is most often found in Austria (25%) and France (22%). French programmes are also those most often accredited by both a national and an international body (39%).

It is not clear if the above picture describes the specific situation in English-taught programmes only, or if it is also indicative of a general trend in European higher education. The 2002 study, which looked into the question of whether there were specific accreditation methodologies for this type of programme, found that this was generally not the case.

Next to accreditation, quality-assurance and evaluation measures are regular features of English-taught programmes, as Table 45 shows.

Only one quarter of all English-taught programmes do not have regular evaluation carried out by either internal or external experts. The highest shares of evaluation-abstentious programmes were reported from Turkey and Finland (43% and 35%) and the lowest from Norway (4%).

Exclusively external evaluation is rare, at 12 percent Europe-wide. It is most frequent in Sweden (28%), Lithuania (27%) and Austria (25%). No Swiss programme conducts purely external evaluations. The low share of a purely external approach does, however, not mean that the use of external reviewers is uncommon. The Europe-wide proportion of programmes that use teams of internal and external experts is substantial, at 37 percent, meaning

Table 45
Experts carrying out regular evaluations of English-taught programmes
– by country (percentages)

	Country of university																Total
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other		
Internal and external experts	25	59	13	50	34	26	21	17	47	60	61	27	30	24	31	37	
Only internal experts	25	12	75	25	32	42	34	39	7	7	13	27	28	19	25	26	
Only external experts	25	12	0	0	12	7	11	22	27	9	22	7	28	14	11	12	
No regular evaluation	25	18	13	25	22	26	35	22	20	24	4	40	15	43	33	25	
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	
Count (n)	(8)	(17)	(24)	(8)	(186)	(43)	(104)	(23)	(15)	(177)	(23)	(15)	(54)	(21)	(36)	(754)	

Source: Programme Questionnaire

Question 4.3: Which of the following means of accreditation and quality assurance are applied or will be applied to the programme?

that almost every second programme (49%) makes use of the services of externals in their evaluation efforts. The share of programmes which employs this combined approach is highest in Norway, with 83 percent, and still considerable in Belgium and the Netherlands (71% and 69%). The proportion of programmes solely reviewed by staff from the own institution is highest in France (39%) and Germany (32%).

In the Programme Survey, Programme Directors were also asked if they used any further measures aimed at assuring quality. Respondents state that in

- 96 percent of all cases students regularly assess the performance of teachers;
- 79 percent of all cases alumni networks have been established;
- 67 percent of all cases follow-up surveys to measure the success of graduates on the labour market are being conducted;
- 42 percent of all cases teachers' mastery of English is tested, and in 6 percent of all cases other means are applied.

Some of the above results are somewhat surprising, to say the least. Particularly the claim of almost all Programme Directors that students evaluate the performance of their teachers probably has to be taken with a grain of salt. It is more than likely that the impression gained during the 2002 site visits is still valid, which the authors expressed in the following way:

Most programmes asked students, at the end of each year, to give their opinion on the (academic and administrative) quality of single courses or the whole ELTDP (= English-language-taught degree programme). However, these quality control measures were mostly of a rather "home-made" sort, and lacked (but also did not aspire to) the methodological rigour as well as the scale of an exercise meriting the label "evaluation".

It is equally surprising that almost four fifths of all programmes report the creation of an alumni association. In the 2002 study, the percentage was considerably lower, at 57 percent, and the site visits stirred some doubt about the reliability of this figure. Many Programme Directors interviewed during the site visits stated that there were no resources to carry out such work for the time being and that the utmost to be achieved was to keep up informal contact with some graduates. The attention which alumni receive has certainly increased in European higher education over the past five years. But it is legitimate to assume that many programmes are rather stating intentions than presenting reality. The same goes for the two thirds of respondents who claim that they track their graduates through the labour market.

Even the claim of 42 percent of respondents that teachers have to provide evidence of a sufficient command of the English language is higher than was to be expected. In 2002, the share of programmes which claimed to test teachers was 13 percent. Anecdotal evidence from some countries suggests that institutions have indeed given up their earlier *laissez-faire* approach to some degree, but it is quite unlikely that 42 of all programmes actually have the courage to subject their teachers to proper exams. Again, these are probably intentions in most cases. In other cases, there might be a very relaxed interpretation of the term 'evidence'.

6.7 Prior knowledge of students

Programmes taught in English attract students from very different parts of the world. The homogeneity of learner groups can therefore be expected to be considerably lower than of those in "traditional" programmes. This applies to a number of factors, such as language issues, which were dealt with above, and intercultural challenges, for example. Another factor relevant in this respect could be diverging levels of prior "academic" (content) knowledge of students, due to the different educational backgrounds and pathways that students in English-medium programmes come from. In the 2002 survey, this was regarded as a significant problem by 30 percent of Programme Directors.

In which way does the heterogeneous prior knowledge of students in English-taught programmes affect the learning situation? According to respondents at the central as well as the departmental level, it poses a problem which should not be underestimated. The Institutional Survey reveals that "large differences in the academic level and abilities of foreign students" remain, as in 2002, the second most important challenge (21%), only surpassed by problems that foreign students have with the language of their host country (39%). Table 46 shows that programmes in Sweden (38%), Belgium (33%), Norway and Germany (26%) encounter the highest degree of difficulties with different levels of prior knowledge.

Table 46
Significant difficulties encountered in the introduction of English-taught programmes – by country (percentages*)

	Country of university															Total
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other	
Large differences in the academic level/ability of foreign students																
ERASMUS																
Coordinator	13	29	25	8	20	40	26	12	17	18	20	15	27	8	25	21
Programme																
Directors	17	33	17	0	26	12	19	0	0	14	32	0	38	10	21	20
Count (n)	(9)	(9)	(5)	(15)	(57)	(16)	(32)	(29)	(13)	(22)	(15)	(32)	(12)	(15)	(79)	(360)

Sources:

Institutional Questionnaire:

Extract from Question 3.3: Did your institution encounter significant difficulties in any of the following areas with regard to the implementation of the English-taught programme(s)?

Programme Questionnaire:

Extract from Question 4.5: Did you encounter significant difficulties in any of the following areas with regard to the implementation and running of the programme?

* Points 4 and 5 on a scale from 1 = "no problems at all" to 5 = "very serious problems"

However, it should be noted that the problem is, according to the results of the present survey, less widespread than five years ago. Since admission requirements do not seem to have become more demanding (entrance examinations, for example, were actually more frequent in 2002 than today), it is not probable that selection procedures leading to the intake of more homogeneous learner groups are the explanation. It is possible that the degree of heterogeneity has not decreased, but that this is viewed today as less of a problem than five years ago, when English-taught programmes were mostly a very recent creation, and the problem was very new. Perhaps the warning uttered in the 2002 study has thus been taken seriously:

It must be stressed that it would be unrealistic to hope to achieve the same level of homogeneity that institutions are used to when teaching groups coming from one single education system. In this respect, as in many others (language, culture), universities and colleges entering into programmes taught in English must be aware that one cannot hope to attract the youth of the world and come out of this experience unchanged. ELTDPs (= English-language-taught degree programmes) ultimately require adaptation at the providing end, too.

6.8 Student services

The majority of students enrolled in English-medium programmes are foreigners in their country of study (65% in this study). International students, and especially those with geographically distant and culturally diverging ori-

gins, have special needs, which their host universities and colleges try to meet by providing targeted services and assistance. The Programme Survey tried to find out which efforts institutions make to meet these needs. The answers indicate that institutions' efforts are by no means negligible. International students enrolled in English-taught programmes are being provided with assistance, guidance and advice in various respects. According to the Programme Directors,

- 96 percent give advice in personal matters;
- 81 percent assist in the provision of accommodation, or do provide accommodation;
- 78 percent of institutions provide substantial academic counselling;
- 74 percent support students to obtain a visa;
- 72 percent support students to obtain a residence permit;
- 59 percent offer services related to leisure and culture;
- 47 percent advise students on financial matters; and
- 32 percent help their students to obtain work permits.

While students in first and second-cycle programmes receive support to more or less the same extent, there are substantial national differences, as becomes a look at Table 47 reveals.

Table 47
Substantial provision of assistance and advice to foreign students enrolled in the programmes – by country (percentages*)

	Country of university																Total
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other		
Help and advice in personal matters	89	100	96	100	96	98	100	96	100	97	95	93	89	88	88	96	
(Help with) provision of accommodation	44	71	88	88	81	98	58	91	85	93	95	83	83	81	67	81	
Academic advice and counselling	56	53	88	100	82	80	62	91	77	95	73	77	54	81	64	78	
Support to obtain visas	56	53	96	86	81	84	41	61	75	97	68	50	55	53	71	74	
Support to obtain residence permits	44	71	95	83	75	86	43	64	83	95	71	36	48	53	70	72	
Offer of social/leisure activities	56	81	75	75	54	48	53	70	69	65	82	83	51	53	45	59	
Support and advice in financial matters	14	50	88	33	49	38	19	57	58	72	33	64	24	27	31	47	
Support to obtain work permits	0	40	0	25	42	56	13	13	50	41	43	20	15	25	33	32	
Count (n)	(9)	(18)	(24)	(8)	(192)	(43)	(105)	(23)	(14)	(152)	(22)	(15)	(53)	(20)	(34)	(732)	

Source: Programme Questionnaire

Question 3.2: To what extent are foreign students enrolled in your programme provided with assistance and advice?

In the top category, help and advice in personal matters, countries differ very little from one another. The differences are, however, substantial in the second most often reported category, the provision of accommodation. 98 percent of Danish programmes provide (or help to find) accommodation, but only 44 percent of Austrians do. The range is equally wide in the case of academic counselling, which all Czech programmes provide, but only 53 percent of Belgian programmes. There are also large differences in the help provided to obtain visas and residence permits. In the case of visas, Dutch programmes come out top (97%), whereas Finnish programmes are at the bottom (41%). Dutch – and Swiss – programmes are also in the lead when it comes to help with residence permits (both 95%), while Polish programmes provide this service least often (36%). Across all categories, the Dutch programmes are the most frequent service providers (a finding which is not inconsistent with other ACA research in the field of student services). It must be pointed out, however, that some services are more necessary in some countries than others – in the case of visas and work permits, for example, depending on differently strict immigration legislation and practice, which could distort the picture. It is also to be borne in mind that the concept of a ‘substantial service’ might differ between countries and that respondents in some countries had a more modest appreciation of their own efforts than those in others.

A comparison with the 2002 findings reveals no consistent tendencies. In five of the eight categories, the percentage values in the present study were lower; in the remaining three, they were higher.

6.9 Spin-offs and outcomes

Which wider effect does the introduction of teaching in English have on a higher education institution, on its different units, and on teachers and students? Are there any spin-offs, be they of an expected or unexpected sort? The Institutional Survey addressed the issue of spin-off effects which English-taught programmes might have brought about.

The most frequently mentioned spin-off effects on a European average are an “increase in marketing activities” and the “improvement of service and assistance measures for international students”. Both are mentioned by 72 percent of all Programme Directors. The importance which programmes now attribute to marketing and promotion is also highlighted by the number three category (62%), “targeted recruitment of students”, which is closely related to marketing. English-medium programmes appear to have acted as a catalyst in the improvement of marketing and promotion in European higher education, as also other findings of this study show. A higher degree of “flexibility in the admission of international students” follows in fourth place (47%).

Table 48
Spin-offs resulting from the introduction and operation of English-taught programmes – by country (percentages, multiple replies possible)

	Country of university																Total
	AT	BE	CH	CZ	DE	DK	FI	FR	LT	NL	NO	PL	SE	TR	Other		
Increase of marketing activities of the institution	60	43	83	79	82	80	79	71	85	64	57	68	64	80	67	72	
Improvement of assistance/ guidance/ advice for foreign students	60	29	50	71	73	80	79	54	92	82	86	84	82	53	70	72	
More targeted recruitment of students	60	71	67	50	57	87	62	64	85	77	50	58	55	73	56	62	
More flexibility in the admission of foreign students	70	14	0	50	47	67	41	57	31	32	50	65	18	53	48	47	
Other	10	29	17	7	14	7	7	11	0	14	0	16	9	0	10	10	
Total	260	186	217	257	273	320	269	257	292	268	243	290	227	260	251	263	
Count (n)	(10)	(7)	(6)	(14)	(51)	(15)	(29)	(28)	(13)	(22)	(14)	(31)	(11)	(15)	(79)	(345)	

Source: Institutional Questionnaire

Question 3.4: Were there any spin-offs resulting from the implementation and running of English-taught programme(s)?

There are some remarkable differences between countries. In the top-ranked category, i.e. marketing, Lithuanian programmes most often report increased activity (85%), closely followed by Swiss (83%), German (82%), Danish and Turkish institutions (both 80%). Belgian programmes least often report increased marketing activities. Some of the 'leaders' in the first category are also in the top group in the third-ranked category, "more targeted recruitment". This goes for Denmark (87%) and Lithuania (85%), with the highest percentage values, and to a lesser degree, for Turkey (73%). But it does not apply to Germany, which has a below-average percentage value (57%). Belgian programmes, which least often report increased marketing activity, on the other hand, attain an above-average percentage value in "recruitment". In the category "improvement of assistance", Lithuanian programmes come out at the top (92%), followed by Norwegian programmes (86%). Belgian institutions report least activity in this category, with 29 percent.

7 Postscript. Normalcy, at last

English-medium education is starting to become a regular feature of European higher education, at least in those countries of north-west Europe where the offer is concentrated. It is much more frequent now than it was in 2002. It is reasonable to expect that provision will further grow in the years to come.

Yet, despite the steady growth, in no country are English-taught programmes anywhere near challenging the survival of the domestic language. At best (or worst, depending on observer), English might become a language of instruction as frequent as the domestic ones in Master-level programmes in the leading provider countries – and particularly in the Netherlands. Elsewhere, English-taught programmes appear likely to occupy a smaller niche in the higher education offer. In large parts of Europe, and notably in the south of the continent, they will probably remain a rare exception.

Thus, earlier worries that ‘English will ‘take over’ now appear exaggerated, if not far-fetched. On the other hand, the predictions by some critics that the phenomenon would be short-lived and that the domestic languages would reconquer lost terrain have also turned out to be wishful thinking. English-medium education will have its place in European higher education, a smaller or larger one depending on the country we are talking about. Not more, but also not less.

This might be one of the reasons why English-medium education today is perceived as much less ‘exotic’ than five years ago. It is now seen as something quite normal. Neither the proponents nor the critics get half as excited about it as in the early days. As in the case of any other successful reform, this turn towards normalcy indicates that developments have gone past the early pioneer stage, and that the reform is being implemented. Some teething problems have been overcome, as the results of this study would suggest. Others remain, and might stay. What has changed is not so much the degree of the difficulties, perhaps, but the attitude towards them. Europe’s higher education institutions have learned to adapt to them, and to see them as a necessary by-product of a by and large desirable phenomenon. Or, to put it in a nutshell: English-medium education has come of age.

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International students have long favoured Anglophone countries as study destinations. And it goes without saying that the role of English as the lingua franca has been instrumental in attracting foreign students. In the last years of the past century, continental European higher education institutions started to teach in the English language, too, seeking to overcome their linguistic drawback. In 2002, the Academic Cooperation Association (ACA) produced the first ever overview and analysis of the phenomenon. The study, published in the *ACA Papers on International Cooperation in Education*, found that English-medium tuition in continental Europe was still a 'marginal phenomenon' then – even though the offer was expanding by the day. How has the situation developed since? The present book provides the answer to this question. Drawing a detailed European map of English-medium tuition in 27 European countries, it is essential reading for anyone interested in curricular internationalisation – and not least for those from English-speaking countries challenged by Europe's English-taught provision.

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