Bernd Wächter, Friedhelm Maiworm (eds.)

English-Taught Programmes in European Higher Education

The State of Play in 2014

**ACA Papers on
International Cooperation in Education**

Lemmens

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Abbreviations

ACA	Academic Cooperation Association
EMI	English-Medium Instruction
ETP(s)	English-Taught Programme(s)
GES	Gesellschaft für Empirische Studien (Group of Experts for Empirical Studies)
AT	Austria
BE	Belgium
BG	Bulgaria
CH	Switzerland
CY	Cyprus
CZ	Czech Republic
DE	Germany
DK	Denmark
EE	Estonia
ES	Spain
FI	Finland
FR	France
GR	Greece
HR	Croatia
HU	Hungary
IS	Iceland
IT	Italy
LT	Lithuania
LV	Latvia
NL	The Netherlands
NO	Norway
PL	Poland
PT	Portugal
RO	Romania
SE	Sweden
SI	Slovenia
SK	Slovak Republic
TR	Turkey

Country Groups in the Study

Baltic:
- EE Estonia
- LT Lithuania
- LV Latvia

Central East Europe:
- CZ Czech Republic
- HU Hungary
- PL Poland
- SI Slovenia
- SK Slovak Republic

Central West Europe:
- AT Austria
- BE Belgium
- CH Switzerland
- DE Germany
- NL The Netherlands

Nordic:
- DK Denmark
- FI Finland
- IS Iceland
- NO Norway
- SE Sweden

South East Europe:
- BG Bulgaria
- CY Cyprus
- GR Greece
- CR Croatia
- RO Romania
- TR Turkey

South West Europe:
- ES Spain
- FR France
- IT Italy
- PT Portugal

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But first and foremost, it is Europe's higher education institutions and the directors of English-Taught Programmes that the authors owe thanks. Without their willingness to provide information and data on their English-Taught Programmes, this study would not be available.

Bernd Wächter (on behalf of the research team)

Brussels, November 2014

Executive summary

Queenie K.H. Lam, Bernd Wächter (ACA)

The present study was produced between October 2013 and November 2014 by the Academic Cooperation Association (ACA), in collaboration with the Gesellschaft für Empirische Studien (GES) and StudyPortals BV. The study was made possible by a grant from the Lifelong Learning Programme (Accompanying Measures) of the European Commission's Directorate General for Education and Culture.

History

The present study is the third one which maps and analyses the provision of English-Taught Programmes (ETPs) in Europe. The earlier studies[1] appeared in 2002 and 2008. The 2002 study was the first ever attempt to investigate systematically the phenomenon of ETPs in non-English-speaking countries in Europe, i.e. in countries where English is not the domestic language. Its results were based on two large-scale surveys (the Institutional Survey and Programme Survey) of almost 1,600 higher education institutions in 19 European countries. From among a total of 821 institutions which responded to the survey, 725 programmes taught in English were identified and their characteristics described. For the first time, some hard facts were made available to inform and turn more rational a heated debate going on at the time on the provision of ETPs in non-English-speaking European countries. Five years later, in 2007, ACA and GES repeated the surveys to keep track of the development of ETPs and investigate both the quantitative and qualitative aspects of such programmes. The geographical coverage of the second study was expanded to 27 countries[2] and the definition of ETPs narrowed to include only programmes taught fully in English. The 2007 surveys addressed 2,218 higher education institutions and identified 2,389 ETPs. This indicated substantial growth in ETP provision when compared with the earlier study, although such provision remained the exception and outside the mainstream. In 2007, only between 2.1% and 6.8% of all programmes were taught in English; and enrolment in ETPs amounted to just between 0.7% and 1.4% of

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[1] The two previous studies being:
ETPs in European Higher Education. The Picture in 2007.
Wächter, Bernd & Maiworm, Friedhelm. Bonn: Lemmens, 2008. ISBN 978-3-932306-89-1.
English-Language-Taught Degree Programmes in European Higher Education.
Friedhelm Maiworm, Bernd Wächter. Bonn: Lemmens 2002. ISBN 3-932306-47-3.
[2] The 27 EU member states at the time (minus the United Kingdom, Ireland, Malta and Luxembourg), the four European Free Trade Association (EFTA) countries (minus Liechtenstein), plus Turkey.

enrolment in all programmes. Besides, the earlier findings showing that the provision of ETPs was largely concentrated in Central West Europe (with the Netherlands and, Germany in the lead) and the Nordic countries, and that there was a visible North-South divide were both confirmed in 2007.

In order to guarantee comparability with the results of the earlier studies and be able to create a time series, the design of the present study and, in particular, the questionnaires used in the main surveys, was purposely kept, to the greatest extent possible, similar to that of the previous two studies. 'Europe' this time consists of 28 countries[3] with the addition of Croatia, a new EU member state since 2013. The Institutional Survey 2014 addressed a total of 2,637 higher education institutions in the 28 countries. Among them 1,155 responded, accounting for a response rate of 43.8%, which is lower than the 52.7% in our 2001 Institutional Survey but higher than the 38.4% in the one carried out in 2007. Comparatively speaking, the response rate of the 2014 Programme Survey, at 16.2%, is much lower than that in the two predecessor studies. However, in absolute terms, the number of programmes responded to the survey remains high at 1,154, largely due to the record high number of ETPs identified, which is 8,089 in 2014.

Volume and country distribution as in 2014

The big picture

In short, the numbers of identified ETPs went up from 725 programmes in 2001, to 2,389 in 2007 and to 8,089 in the present study. Although we have reasons to believe that the exponential growth since 2001 might be a combined result of actual growth over the years and possible undercounts in the earlier studies, there is now little doubt that a critical mass of ETPs is on offer across non-English-speaking Europe.

The largest absolute number of ETPs was identified in the Netherlands (1,078), whose growth (39.3%) is still below the European average. Closely following the Netherlands is Germany (1,030). Sweden follows in third place (822), ahead of France (499) and Denmark (494). It is interesting to note that some countries with relatively low numbers of programmes in the earlier studies, such as Poland (405), have seen above average growth rates. The same goes for Estonia, where 18 ETPs were identified in 2007 compared with 59 in 2014. These figures indicate that while traditional ETP leaders in Central West Europe and Nordic countries continue to consolidate their positions, new players from Central East Europe and, in particular, the Baltic states are catching up fast.

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[3] The same 27 countries surveyed in 2007, plus Croatia a new EU member state added in 2013.

Despite the remarkable growth of ETPs, only a small proportion of students across Europe are enrolled in ETPs (1.3% of total student enrolment in the countries covered, which translates into an estimate of 290,000[4] students in the academic year 2013/14). Overall, 27% of the higher education institutions addressed in the study[5] offered at least one ETP and about 6% of all study programmes estimated are provided exclusively in English[6]. Even fewer of these programmes enrolled only domestic students (5% of ETPs responded to the survey) or primarily domestic students (20%).

Having said that, one must note that there are considerable regional differences in the spread of ETPs and size of enrolment. Most common are ETPs in the Nordic region where 61% of institutions offer Bachelor and/or Master programmes completely taught in English, 20% of all programmes fall into this category and 5% of all students are enrolled in ETPs. Central West Europe and the Baltic states follow with a substantial proportion of institutions offering ETPs (44.5% and 38.7% respectively), a share of ETPs at about 10% of all study programmes and an enrolment share of about 2%. In all other regions at most one fifth of institutions are running ETPs, at most 5% of all programmes are ETPs and not more than 1% of students are enrolled. The North-South divide observed in the previous two studies clearly remains.

Leading ETP providers in non-English-speaking Europe

In order to identify the 'leaders' in ETP provision, a 'league table' was created, based on three indicators. These are the share of higher education institutions in a country offering ETPs at all, the share of ETPs of all programmes, and the enrolment in ETPs as a share of total enrolment of a country. Countries were ranked on each of these indicators, their rank values added up and divided by three. The country with the lowest value is on top, the one with the highest at the bottom. The Netherlands, Denmark and Sweden, in that order, are the European leaders in the provision of higher education provided in English, followed by Finland, Cyprus, Switzerland, Lithuania and Latvia. Countries such as Hungary and Germany form a middle group, while South Europe (with the notable exception of Cyprus) very much lags behind.

Overall, it is remarkable that all five Nordic countries, as well as all three Baltic ones, are amongst the first twelve countries. The Nordics have consistently been on upper ranks in our earlier studies. The new runners up are clearly the Baltics. Lithuania and Latvia are in the top 10 group and Estonia is slightly

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[4] Of these, the far largest numbers are found in the Netherlands (57,000), in Denmark (34,000), Germany (30,500), and Sweden (20,100) (see Table I.7).

[5] Calculated on the basis of information provided by StudyPortals BV and responses to the Institutional Survey

[6] Calculated on the basis of information gathered with the help of the Institutional Survey

below, in 12th place. The overall ranking also confirms the 2001 and 2007 pattern of a 'north-south divide'.

Institutional context

Not surprisingly, PhD-awarding universities with a large student population and a wide subject range offer the highest number of English-Taught programmes. The same was found in the previous two studies.

The vast majority of the respondents in the study named not only one single but several reasons as crucial for the introduction of ETPs. The two most frequently stated reasons are student-oriented a) to remove language obstacles for the enrolment of foreign students and b) to improve the international competences of domestic students. Another important motive is the possible contribution of ETPs to the sharpening of the international profile of the institution, interestingly not only for fostering partnerships with institutions from other countries but also for sharpening their profile in comparison with other institutions in their own country. Also not a big surprise, the intention to create 'brain gain', in terms of the attraction of future PhD students, international faculty and foreign students who could contribute to the future work force of their own country, turns out to be another highly cited reason. Overall, revenue generation is the least often stated reason, whereas altruistic motives – for example in the area of development cooperation – still play an astonishingly strong role.

What deserves some thought and attention in this study are the substantial regional differences in the reasons for introducing and running ETPs observed between institutions located in the Nordic region and Central West Europe on the one hand and institutions located in South and East Europe on the other hand. The largest difference is in the role of ETPs for the compensation of shortages of the institutions, i.e. for improving the income base of the institution through tuition fees gathered from foreign students and for counterbalancing a lack of enrolment of domestic students. These aspects are far more often a motive for institutions from the Baltic States, from Central East Europe and from South East Europe than for institutions from other regions. Institutions from South European countries most often stated the improvement of international competences of domestic students as the major goal.

The reasons associated with the offer of ETPs further differ between the Bachelor and the Master level. Programme Directors of Master programmes more frequently highlighted the importance of removing language obstacles for the enrolment of foreign students (82% in comparison to 68%) and to attract top talents like future PhD students (74% compared to 40%). Directors of Bachelor programmes on the other hand put more emphasis than directors

of Master programmes on the role of ETPs for the improvement of international competences of domestic students, the sharpening of the international profile of the institution and the compensation of shortages of the institution.

As for reasons not to offer ETPs, they mainly concern the lack of language proficiency of the staff, the lack of confidence that the programme will meet any demand from the students and the lack of funding in general and of human resources in particular. Some considered it 'unnecessary' to offer ETPs as they can also attract some foreign students for study in the domestic language. This was stated more frequently by respondents from more widely spoken language communities, such as German, French or Spanish. In some countries, external constraints, of a legal or regulatory sort, hinder the spread of ETPs. In a number of countries in Central East Europe, but also in countries with more than one domestic language, there is the requirement to double an ETP with one in the domestic language.

Operational aspects of ETPs

Characteristics of ETPs

ETPs in Europe are predominantly offered in the second cycle (Master level). Four fifths of all programmes (80%) belong to this category. Only 20% are Bachelor programmes. These figures are identical with those found in 2007. The dominance of Master programmes is strongest in Central West Europe (91%), South West Europe (91%) and the Nordic countries (82%). On the contrary, ETPs in South East Europe (61%), Central East Europe (42%) and the Baltics (34%) lead more often to a Bachelor degree than on the European average.

How old are ETPs? This is not only of interest to historians, but it also displays 'growth curve'. The years 2009 and 2010 saw a peak in the creation of new ETPs. Since then, growth has continued, but at lower rates. Whether this is indicative of a future stagnation at a high level remains to be seen. As was already the case in the predecessor studies, the 'age' of ETPs differs between countries. A comparable high proportion of programmes starting in recent years, i.e. since 2011, could be found in South West and Central East Europe (respectively 37% and 35%) and the Baltics (33%).

In terms of duration, the completion of a second-cycle degree (Master) requires two years in the majority of Master programmes (67%). Only 18% offer a Master degree within only one year and 10% have a standard period of 1.5 years. Long university programmes of four or more years leading to a Master equivalent degree are a clear minority. It is interesting to note that short Master programmes of less than two years' duration are most common in Spain

(85% of the respective programmes), Switzerland (65%), Latvia (55%) and the Netherlands (51%).

According to the ISCED 2011 classification of broad groups and fields of education, the highest proportion of ETPs covered by the survey is offered in social sciences, business and law (35%), followed by sciences (23%) and engineering, manufacturing and construction (18%). All other subject areas remain below 10%, although a large variety of subjects are available as ETPs in Europe as indicated in StudyPortals' database.

The overall distribution across disciplines differs by levels of study. The subject area group of social sciences, business and law is the clear leader in undergraduate (Bachelor-level) programmes (42%). Programmes in natural sciences, on the other hand, tend to be offered more often at the Master level (26% as compared to 11% at the Bachelor level).

Student enrolment

Bachelor programmes are considerably larger than Master programmes in terms of programme size. In the academic year 2013/14 about two thirds of all Bachelor programmes (66%) have an enrolment of above 50 students, while the respective proportion of Master programmes is only about one quarter (26%). The smaller programme size of Master programmes is not country specific, but the rule throughout all regions.

With regard to selectivity, a comparison of the number of applicants with the number of first year students shows, on average, a demand six times higher than the offer (places available). Admission in Bachelor programmes taught in English is not as selective as that in Master programmes (31% success rate compared to 14%). In contrast, the number of applicants for Master programmes is often three or more times higher than the number of first year students admitted.

In terms of student mix, on the European average about 54% of all students enrolled in ETPs are foreign students. In the 2007 surveys, their proportion was considerably higher, at 65%, and in 2002 only slightly higher, at 60%. Most ETPs now have a mix of foreign and domestic students. Only 5% of the ETPs surveyed reported that only domestic students are enrolled in their programmes. On the other hand, 10% of ETPs stated that all students are from outside their own country. Comparatively speaking, ETPs in the Baltics and in South East Europe tend to enrol domestic students, while those in the Nordic region and Central West Europe foreign students. The proportion of foreign students in Master programmes is on average substantially higher than in Bachelor programmes (57% as compared to 39%).

The enrolment of domestic and foreign students in ETPs differs substantially by country. Domestic students have a share of more than three quarters in Lithuania (97%), Latvia (92%), Romania (90%) and Turkey (84%). On the other hand, the proportion of foreign students from non-EU/EFTA countries is highest in Poland (54%), Belgium (54%), Finland (54%) and Germany (51%).

Student admission practice

The most important criteria for selecting students for both Bachelor and Master programmes are the academic and intellectual potential of the applicants (92% of the programmes apply these selection criteria) and the proficiency in English (88%). Following that, personality, social and cultural competences are more often a selection criterion for Bachelor programmes whereas practical experience plays a more important role in Master programmes. Altogether, only a few programmes rely solely on educational credentials like grades or certificates for the selection of students (7%).

More specifically, the requirement of an English test is most frequent in the Nordic countries (85%) and Central West Europe (80%), whereas only 41% of institutions in the Baltics have this requirement in place. It is also interesting to note that access to ETPs without the requirement to fulfil any specific criteria or passing tests is easiest in the Baltic countries (37%) and Central East Europe (23%). The Nordic, Central and South West countries have a very low proportion (9-10%) of institutions without any admission requirements.

Language matters

Language proficiency

The large majority of Programme Directors rated the proficiency in English of students enrolled in their ETPs as good or very good. The competences of domestic students were however more positively assessed than that of foreign students, at 80% with a good or very good command of English compared to 73%. The only exceptions are Spain, France, Italy and Turkey, where the proficiency of foreign students was rated higher than that of the domestic students.

The English proficiency of students also differs by subject area and study level. Students in social sciences, business and law, both foreign and domestic, were reported to be better prepared to learn in English than those in engineering, manufacturing and construction as well as in sciences. By level of study, both the English proficiency of Master-level foreign students (75% compared to 64%) and of domestic students (81% compared to 78%) was reported to be higher than those in Bachelor programmes. Correspondingly, regions where there has been high growth in the number of Bachelor pro-

grammes taught in English (e.g. Central East Europe and the Baltics) are also more likely to have enrolled students with lower English proficiency.

Among all the six regions compared in this study, Central East Europe, which provides over one third of the ETPs at Bachelor level responded to this survey, reported the biggest concern over the English proficiency of foreign Bachelor students. Only 55% of the Programme Directors rated the English skills of these students positively.

As was found in the previous studies, the English proficiency of academic staff involved in the teaching of ETPs continues to be perceived positively across Europe. Almost all Programme Directors rated the English proficiency of academic staff teaching in ETPs as good or very good (95%). Respondents from Spain were most critical of the English proficiency of their teaching staff (88%).

Contradictory to the nearly perfect picture presented above, the English proficiency of administrators was reportedly the least impressive among all those involved in ETPs, particularly in new growth countries (e.g. Turkey) and the south (e.g. Spain). This may not be a surprise though, considering that ETPs are a rather new phenomenon in these regions and that they are much more likely to enrol domestic students who are able to communicate in the domestic language.

Language problems

By and large, the command of English of both domestic students and foreign students appears to be more than sufficient according to the Institutional Coordinators and Programme Directors, but the 'heterogeneity' in the command of English of the students in the classroom was viewed as a problem. What has not changed over the years is the unmet expectation of the mastery of the domestic language by foreign students. This remains the most important language-related problem in the eyes of Institutional Coordinators.

In relation to the key language problem in classroom teaching – 'heterogeneity' in the command of English, the main language-related challenge encountered by teaching staff is their ability (or the lack of it) to deal with such diversity in addition to their mastery of the language itself.

Beyond the classroom, problems found among administrative staff were the most frequently reported in this study. The English proficiency of administrative staff, especially those in central administration (such as the registry, financial office, housing office, student service centre, etc.), was regarded as least satisfactory by the survey respondents. Some Programme Directors pointed out that the administrative staff are not only unprepared to deal with students in English, but also unwilling to do so.

Language support measures

Corresponding to the perceived lack of domestic language skills among foreign students, training in the domestic language for foreign students was more often mentioned than English language training for domestic or foreign students. Overall, less than one third of all responding programmes and institutions provide no language training element at all (29% of the programmes and 27% of the institutions). More than half offer support for improving the command of the domestic language (55% and 58%), about half offer training in English for domestic students (48% and 51%) and foreign students (49% and 43%). With regard to training in the domestic language, South West Europe, specifically France (71%) and Italy (68%), is the most active in this respect. This is followed by the Nordic and Baltic regions, as well as South East Europe, where the emphasis is placed on the Bachelor students.

By study level, English language training is more often a characteristic of first-cycle, Bachelor programmes. This corresponds to the reportedly lower English proficiency of students enrolled in Bachelor programmes. Specifically, Bachelor students, both foreign and domestic, in South West Europe and South East Europe are more likely to receive English support than those in other regions.

In Central East Europe, where there is a large share of English-taught Bachelor programmes and a serious problem perceived in the English proficiency of foreign Bachelor students, the emphasis has been placed on foreign Bachelor students. On the contrary, in the Baltic region, and in particular Lithuania (79%), English language support has been primarily offered to domestic students since ETPs in this region attract predominantly domestic students (over 90% of students enrolled in ETPs).

Relating to the English skills of academic staff, about half of the Master programmes and 70% of Bachelor programmes that responded to the survey reported that English proficiency is an important selection criterion for the recruitment of new academic staff. Denmark, Turkey and Belgium are the countries where two thirds of ETPs reported that English is a selection criterion for new staff recruitment. On the contrary, mandatory English courses for academic staff are rather rare (19% for Bachelor and 11% for Master programmes). However, there are country differences. In Belgium and the Netherlands, 59% and 42% of all the programme respondents reported that it is mandatory for academic staff to improve their English. Less so, but still one third of the programmes in Hungary and Lithuania reported the same. Except the Netherlands, such a mandatory measure appears to be more commonly adopted by the 'rising stars' than those that are established providers (e.g. Norway and Sweden where no programme reported such a measure).

As to administrative staff, the introduction of English proficiency as a selection criterion was mentioned by 50% of the Programme Directors of Bachelor programmes and 43% of the Directors of Master programmes. This criterion was most frequently found in Austria (62%), the Czech Republic (62%), Hungary (61%), Switzerland (60%) and France (60%). Although mandatory measures to improve the English proficiency of administrative staff are rarely taken, nearly one fifth of the programmes in the Netherlands, Romania and Italy reported to have requested their staff to undergo such training.

Impact of ETPs

The most frequently mentioned effects of ETPs are an improved international profile/awareness of the institutions (84%), the strengthening of cooperation with foreign partner universities/institutions (81%) and the improvement of assistance/guidance/advice for foreign students (71%) which includes the provision of information and services in English. Furthermore, as a result of ETPs, 56% of respondents declared to attribute higher importance to marketing and promotion in general, as well as to the 'targeted recruitment of students' in particular (54%). Further effects are the increased offers for English language training (51%) and a higher flexibility in the admission of foreign students (50%). Among the countries compared, we again observed a pattern that mature ETP providers, i.e. the Nordic countries and Central West Europe experienced less of the effects than the newcomers, i.e. the Baltic States, South East and South West Europe. This is new but not surprising as the young ones tend to change also faster.

Part I – The big picture

Friedhelm Maiworm (GES), Bernd Wächter (ACA)

1 Objectives and methods

1.1 Background and aims

To increase the international mobility of students has been one of the most widely shared objectives of higher education policy in Europe in the past two or three decades. This goes for temporary (credit) mobility, which was boosted by the ERASMUS Programme started in 1987[7], but also for degree mobility, i.e. the study of a full degree programme in another country. In the policy discourse, international mobility is almost exclusively positively connoted. It is viewed as resulting in a wide range of benefits, amongst them

– increasing international understanding (or, in Europe, the building of a European identity),

– educating future 'ambassadors' for the host country and the country of origin,

– learning 'from contrast'

– enhancing education opportunities for students from low and middle income countries (including 'developing' countries)

– securing a steady inflow of talented students who would later become young researchers in the host countries and thus strengthen the higher education and research system,

– increasing labour market opportunities 'abroad' by providing graduates with an international experience and internationally valued competences ('employability' at home and abroad), and

– generating income by means of tuition fees in those countries where the latter can be charged.

Therefore, one of the policy priorities in Europe – and increasingly elsewhere in the world, too – has been to remove or to reduce barriers possibly preventing students from becoming internationally mobile. Efforts to remove

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[7] ERASMUS marked in many, though not in all European countries, the onset of large-scale student mobility. Some countries, such as Germany, had already had prior to ERASMUS, a considerable number of scholarship programmes both for outgoing and incoming mobility.

mobility obstacles have included a systematic collaboration between study programmes in different countries to ease transition from one programme to another, the introduction of a 'common exchange currency' for study abroad in the form of the ECTS (both started in the context of the ERASMUS Programme and aiming at facilitating credit mobility), the creation of a 'welcome culture' for foreign students and the introduction of an array of student services, and even the introduction of a common (or, at any rate, very similar) degree architecture in Europe through the Bologna Process, which was believed to facilitate mobility across country borders.

One major 'mobility obstacle' was obviously the language of instruction, which was, with very few exceptions, the domestic language (or one of them in multilingual countries) until the end of the last century. This posed an 'access problem' almost everywhere in Europe. But while countries with widely spoken languages, such as France or Germany, still were accessible for a larger number of foreign students, the problem in countries with more rarely spoken languages was severe. How could Iceland, Finland, Hungary or even the Netherlands ever hope of attracting considerable number of foreign students (credit and degree mobile students alike) if they continued to exclusively teach in their own language? One obvious strategy to overcome the 'linguistic disadvantage' was to revert to the most widely taught language in secondary education world-wide, i.e. English. This strategy appeared all the more promising since, from about the year 2000 onwards, an increasing number of European governments started to try to attract non-European students into their higher education institutions and mounted major marketing campaigns for this purpose. This group of foreign students could be even less expected to master (or even try to learn) the domestic language in their European host country. In addition, teaching in English and in a multi-national learner group was believed to be an attractive option for an internationalised education of domestic students, too.

However, the emerging trend to 'go English' was not greeted by all parties alike. When at the beginning of the present century this trend to offer ETPs in non-English-speaking countries set in[8], it produced a controversial and at times highly emotional debate. There were signs that this debate would finally calm down. In our last book on ETPs published in 2008 (surveys conducted in 2007), we came to the conclusion that there was "normalcy, at last". The authors have since developed second thoughts on this. Be that as it may, at the beginning of the century there were two camps when it came to English-

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[8] Some English-Taught Programmes were started in the 1990s and even the 1980s. Hungary started to offer even under a Communist government programmes in Medicine and Dentistry, and a number of countries provided programmes for students from developing countries in English. But these were far and few between.

medium instruction. Its proponents, who did not all claim there were no language issues at all, saw no alternative to the introduction of ETPs, given the 'linguistic disadvantage' of countries with small language communities addressed earlier. The camp of the critics, on the other hand, painted a picture of gloom and doom. They predicted the death of many smaller languages as a medium of scientific expression (strangely ignoring the point that English-Medium Instruction, or EMI, is about education, and not - mainly - research and the publication of its results, which had switched to English quite some time earlier). Further claims were that EMI was incompatible with the national mission of higher education institutions to first and foremost educate their own citizens. Further, the allegation was that teaching and learning in a foreign language would unavoidably lower the quality of education provided. Sometimes, claims went so far to suggest that in ETPs, students who did not understand English were taught by staff unable to speak and write the language properly. The heat of these discussions stood in remarkable contrast to the very modest body of empirical knowledge available on the issue. At the turn of the millennium, there was not a single publication providing a comprehensive and systematic overview of the extent and the nature of the phenomenon in European higher education. Anybody could claim whatever – or the opposite – and get away with it. It was time to try to change this.

The predecessor studies

In this less than satisfactory situation, the Academic Cooperation Association (ACA) decided in the year 2000 to systematically investigate the phenomenon of ETPs in Europe. The outcome of this decision was the publication, in 2002, of *English-Language-Taught Degree Programmes in European Higher Education: Trends and Success Factors*, which ACA had produced in collaboration with the Gesellschaft für Empirische Studien (GES, Kassel, Germany). The study was based on the findings of two large-scale surveys of a total of 1,558 higher education institutions in 19 European countries.[9] The study identified 725 programmes taught in English from among a total of 821 institutions which responded in the survey. These programmes represented between roughly two and four percent of all programmes on offer in the 19 countries and they enrolled between 0.2% and 0.5% of all students studying in the said countries. In other words, in 2001, when the surveys were carried out, English-medium instruction was a rare phenomenon. This applied to any country in Europe, even though most of the offer was concentrated in the Nordic countries and the Netherlands and southern Europe was largely 'ETP free'. However, growth was fast.

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[9] The at that time 15 European Union member states with the exception of the UK, Ireland and Luxembourg, the four member states of EFTA excluding Liechtenstein, and four countries at the time in accession to the EU, the Czech Republic, Hungary, Poland and Slovakia.

In order to keep track of developments, ACA and GES repeated the surveys five years later. The result was the publication ETPs in European Higher Education. The Picture in 2007, which appeared in 2008 but was based on surveys carried out in 2007. This time, the number of countries covered was 27.[10] Unlike the first study, this one did no longer include programmes partly taught in English. This – and a few other but minor – changes apart, the design of the study remained very much the same, which made comparisons with the results of the first surveys possible. The 2007 surveys addressed 2,218 higher education institutions and identified 2,389 ETPs. On average, between 2.1 and 6.8% of all programmes were taught in English, a clear rise on the earlier study. In terms of enrolment, between 0.7% and 1.4% of all programmes were in ETPs. Again, the Netherlands and the Nordic countries were amongst the leaders in offering such programmes.

Team, structure of the publication and issues covered

As was the case with the studies published in 2002 and 2008, the present publication was the result of a cooperative effort between ACA and GES. However, for the first time, the consortium also entailed the Dutch company StudyPortals BV, whose online database of ETPs proved to be very helpful for the production of this report. Further, the team was supported by Ulrich Teichler (Kassel, Germany), who acted as the head of an expert group, the External Quality Council, which advised on important aspects of methodology as well as on the substance of the publication itself.

Like the earlier studies, the present one tries to give a detailed account of the volumes as well as the nature of the European offer of ETPs. In this attempt, it addresses the following issues, amongst others:

What are the volumes of ETPs in Europe in 2014? Has growth continued since 2007, and has perhaps even a 'critical mass' been reached, exceeding the modest levels reached earlier? Have there been any marked changes in the European 'ETP league table', or is the north and the north-west of Europe still in the lead, as was the case earlier? The answers to these questions are addressed in Sub-section 2, which follows right onto this methodological section. Both sections are part of Part I of this publication.

So is Sub-section 3, which explores which kinds of higher education institutions are offering ETPs and which not. Is the offer concentrated in large, research-focused universities, or are ETPs more common in smaller and specialised institutions offering programmes up to the Master level? Are comprehensive institutions (in terms of disciplinary focus) more likely to provide

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[10] The 27 EU member states at the time, minus the UK, Ireland, Malta and Luxembourg, the four EFTA countries minus Liechtenstein, plus Turkey.

ETPs than their specialised counterparts? Sub-section 3 also deals with the reasons of institutions for offering ETPs – or not offering them.

Part II, which is made up of nine sections, deals with key features and aspects of the daily operation of ETPs. While Part I deals, by and large, with the institutional level, the focus of Part II is on the ETPs as such. We address questions such as the age (year of creation) of ETPs, the level (Bachelor or Master) at which they are offered, and the subject areas they cover. Likewise, we are addressing questions related to the means and channels of marketing, programme size and number of applicants, the regional origin of ETP students, characteristics of the curriculum beyond the fact that the programmes are taught in English, and, last but not least, the main challenges encountered in the operation of ETPs.

Part III focusses on issues of language quality. This means first and foremost the level of mastery of English of students, as well as of teaching (and, to a smaller degree, administrative) staff. However, Part III also addresses the degree of proficiency of ETP students in the domestic language.

Part IV, the final one, consists of three sections, which explore the wider institutional impact of ETPs on institutional policies and administrative procedures, the benefits of ETPs for participating students and the institution as such, and also look into the development of student services in English (potentially) as a result of ETPs.

The book ends with an outlook on the future of English-medium instruction in Europe.

1.2 Definitions

Which types of higher education programmes does this study cover, and which not? There was a need for definition concerning three main issues.

– *Geographical* coverage, or to put it differently, which countries are covered by the present study?

– *Institutional eligibility*: how was the sample of institutions which were addressed in our surveys defined?

– *ETPs*: what exactly were the requirements for a programme to qualify as an English-Taught Programme?

The geographical coverage of the study is Europe. For the purposes of this study, "Europe" consists of the following 28 countries:

– The member states of the European Union, which had grown from 27 to 28 since the 2007 surveys (with Croatia as the additional member state), except the United Kingdom, Ireland and Malta, where English is the (or a) standard medium of instruction, as well as Luxembourg (because of size). These are 24 countries.

– The countries making up the European Free Trade Association (EFTA), with the exception of Liechtenstein, which is a case similar to that of Luxembourg. These are Iceland, Liechtenstein and Norway.

– Turkey.

To increase comparability and be able to more clearly sketch the bigger picture, the 28 countries have been grouped in 6 regions, the results being presented both by country and by region (when interesting). This is a novelty compared to the 2002 and 2008 studies.

The 28 European countries covered in the study by region

Baltic:	**Nordic:**
EE Estonia	DK Denmark
LT Lithuania	FI Finland
LV Latvia	IS Iceland
	NO Norway
	SE Sweden
Central East Europe:	**South East Europe:**
CZ Czech Republic	BG Bulgaria
HU Hungary	CY Cyprus
PL Poland	GR Greece
SI Slovenia	HR Croatia
SK Slovak Republic	RO Romania
	TR Turkey
Central West Europe:	**South West Europe:**
AT Austria	ES Spain
BE Belgium	FR France
CH Switzerland	IT Italy
DE Germany	PT Portugal
NL The Netherlands	

In these 28 countries, any higher education institution was included in the sample which held a so-called "ERASMUS Charter" in the academic year 2012/13. Like in the predecessor studies, there were two sets of reasons for this "eligibil-

ity criterion", one pragmatic, the other substantive. The pragmatic reason was that we had access to the electronic addresses of all "Institutional ERASMUS Coordinators" of institutions with an "ERASMUS Charter". This provided the project team with a "port of entry" in all institutions concerned, which is extremely helpful in the case of a large-scale survey. One of the substantive reasons for the "ERASMUS charter" criterion was that universities and colleges able to participate in ERASMUS are chosen by the government of their country, and are therefore 'recognised institutions'. At the same time, the policy of most countries for nominating institutions able to participate in ERASMUS is not selective, in the sense that only particularly high-performing institutions would be nominated. In other words, countries would only eliminate non-accredited institutions. Therefore, the institutions addressed are fairly identical with the entirety of Europe's higher education institutions.[11] The application of the above selection criterion resulted in a total of 2,637 higher education institutions and thus over 400 more than in the surveys carried out in 2007.

Three criteria were applied to define an "English-taught" Programme.

– Programmes had to be either at Bachelor or Master level (or an equivalent of the latter). This had already been the case in our 2008 publication, though not in the first study of 2002. In accordance with the Bologna requirements, a Bachelor programme is defined as a first-cycle programme of at least three years' duration. A Master programme is a second-cycle programme of at least one year's duration and requiring, as a minimum entry qualification, a Bachelor degree, or a single-cycle 'pre-Bologna' qualification, of a minimum duration of four years. The study thus excluded, as already did the previous one, 'short-cycle' sub-Bachelor qualifications of under three years, but also PhD studies.

– In order to qualify, programmes had to be 100% taught in English. In other words, the study excluded "mixed" programmes taught predominantly, but not entirely in English. This approach had already been applied in our 2007 surveys, but not in the initial 2001 ones (where 21% of programmes identified were 'mixed-mode').

– Like in the two predecessor studies, programmes in which English is (part of) the object of study, were excluded. Programmes in the area of English language and literature or in American Studies, to name only two examples, were not eligible.

We would like to let the reader know that in this study, like in our last one on the issue, we are using the terms English Taught Programmes and English-

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[11] Only in France and in Spain did we eliminate a number of institutions with an ERASMUS Charter from the list, because these offered only programmes at the sub-Bachelor level (ISCED 5).

Medium Instruction synonymously. The same applies to the abbreviations for these terms, ETPs and EMI.

1.3 Methods

This study was carried out mainly with the help of four surveys, two smaller and two larger ones. These information and data sources were complemented by a review of relevant literature, internet searches and official legal or regulatory documentation.

The first of the two smaller surveys addressed a selection of the members of the IntlUni project (coordinated by Aarhus University in Denmark), which is an ERASMUS Academic Network addressing "the challenges of the multilingual and multicultural learning space of the international university". In order to develop more targeted questions for the Institutional and the Programme Survey, the partners of this network were asked to detail quality challenges, particularly in the field of (English) language command of staff and students. The feedback from this small-scale survey consisting exclusively of open questions helped immensely to enrich and to better focus the questionnaires for the Institutional and Programme Surveys.

The second small-scale survey – again following mainly an open question approach – was directed at staff of education ministries and other knowledgeable persons and sought to find out about legal and regulatory restrictions for the offer of ETPs, but also supporting measures, in the 28 countries covered by this study. The results of this survey, like those of the first one, are not separately presented in this study. But they have provided important contextual information, which has helped to interpret the quantitative and qualitative findings of the Institutional and the Programme Surveys.

Institutional Survey

The Institutional Survey addressed a total of 2,637 higher education institutions in the 28 countries covered by the study[12]. An Institutional Questionnaire was sent to the ERASMUS Institutional Coordinators. Its prime purpose was to find out if these institutions offered ETPs or not, as well as to gather information and data on the institution which would be helpful in contextualising the findings of this study. The questionnaire also contained questions on the experiences made in the introduction and operation of ETPs at the institutional level. The majority of questions were 'closed', but the Institutional Survey still contained more open questions than those of 2007, particularly

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[12] The original size of the sample was 3,042 higher education institutions of which 405 could not be contacted due to invalid e-mail addresses of our contact points, i.e. the ERASMUS Institutional Coordinators.

on issues of (English) language quality. The questionnaire also asked institutions to provide the names and contact details of up to 10 ETPs per institution. Since we intended to rely, in the Programme Survey, on the coordinators of programmes in StudyPortals' database of ETPs in Europe, this information was intended to open the possibility of a "Plan B", in case the return rate from contact persons in the StudyPortals' database would be below expectations.

The Institutional Survey was carried out between February and June 2014. Three rounds of reminder e-mails were sent to unresponsive addressees. This way, 1,155 higher education institutions filled in the Institutional Questionnaire. The return rate across Europe was 43.8% (Table I.1). This compares with a return rate of 52.7% in our 2001 Institutional Survey, and 38.4% in the one carried out in 2007.

Programme Survey

The Programme Survey was carried out between April and July 2014. The original addressees were the Programme Directors of StudyPortals' database on ETPs. It became soon clear that response rates would be low, despite concerted efforts to increase it, which is why 'Plan B' was soon activated. This meant additionally addressing the Programme Directors identified through the Institutional Survey. Overall, 8,089 programmes taught in English could be identified with the help of StudyPortals' database and the information provides by Institutional Coordinators.

However, not all of these programmes were addressed in the Programme Survey. It turned out that, in the majority of cases, the contact persons for the StudyPortals' database were not identical with the Programme Directors, but they were persons responsible for a larger number of ETPs – in some cases all of them – at their institutions. In order not to overburden these persons, they were asked to provide the necessary information for a maximum of 10 ETPs per institution. This way, the number of ETPs from StudyPortals' database actually addressed dropped to 6,009. By adding the 1,094 programmes additionally identified with the help of the Institutional Survey the sample for the survey consisted of 7,103 programmes. Even after a number of reminder rounds (for both the addressees responsible for StudyPortals-listed programmes and those identified through the Institutional Survey), the return rate remained very modest indeed. All in all, there were 1,154 respondents to the Programme Survey. This constituted 16.2% of all Programme Directors addressed. Countries with the highest response rates in 2014 were Estonia (34.8%), Slovakia (34.0%), countries with only one-digit response volumes were Bulgaria (6.3%), Slovenia (8.1%), Norway (8.2%), and Denmark (8.7%). Response patterns shifted from the earlier studies, where – with exceptions – the countries north of the Alps had high and southern European countries low response rates (Table I.2).

It needs to be stressed that both the questionnaires for the Institutional and the Programme Survey were designed in a spirit of continuity with the 2001 and 2007 surveys. The only major change was a set of additional and mostly open questions relating to language quality issues. The other parts of the questionnaires remained largely untouched, even in formulations, to facilitate comparisons with the findings of the earlier studies.

Table I.1

Higher education institutions addressed in the Institutional Survey, respondents and return rates in % – by country

Country	Institutions identified (gross sample)	Institutions addressed [1] (net sample)	Respondents	Return rate
AT	73	66	42	63.6
BE	72	67	37	55.2
BG	49	37	13	35.1
CH	39	39	28	71.8
CY	23	19	11	57.9
CZ	79	68	40	58.8
DE	356	311	158	50.8
DK	50	45	22	48.9
EE	23	22	13	59.1
ES	177	156	66	42.3
FI	42	41	28	68.3
FR	701	556	208	37.4
GR	42	34	9	26.5
HR	29	29	13	44.8
HU	54	52	31	59.6
IS	8	6	3	50.0
IT	207	179	53	29.6
LT	43	33	19	57.6
LV	45	40	16	40.0
NL	60	55	27	49.1
NO	56	53	31	58.5
PL	332	297	112	37.7
PT	98	81	29	35.8

Country	Institutions identified (gross sample)	Institutions addressed [1] (net sample)	Respondents	Return rate
RO	77	65	23	35.4
SE	42	41	21	51.2
SI	70	65	27	41.5
SK	33	30	20	66.7
TR	162	150	55	36.7
Total	3,042	2,637	1,155	43.8

Source: Database of ERASMUS Institutional Coordinators of the European Commission 2013
[1] 405 institutions could not be reached because of invalid e-mail addresses of ERASMUS Institutional Coordinators

Table I.2

ETPs addressed in the Programme Survey, respondents and return rates in % – by country

Country	ETPs identified [1] (gross sample)	ETPs addressed [1] (net sample)	Respondents	Return rate
AT	225	222	36	16.2
BE	202	196	47	24.0
BG	32	32	2	6.3
CH	236	230	29	12.6
CY	102	73	9	12.3
CZ	202	199	57	28.6
DE	1,030	1,001	185	18.5
DK	494	392	34	8.7
EE	59	46	16	34.8
ES	417	359	48	13.4
FI	395	347	84	24.2
FR	499	485	87	17.9
GR	24	24	4	16.7
HR	12	12	3	25.0
HU	183	159	45	28.3
IS	33	33	7	21.2
IT	307	281	70	24.9

Country	ETPs identified [1] (gross sample)	ETPs addressed [1] (net sample)	Respondents	Return rate
LT	187	171	25	14.6
LV	99	90	21	23.3
NL	1,078	797	80	10.0
NO	187	183	15	8.2
PL	405	377	51	13.5
PT	139	138	40	29.0
RO	85	80	14	17.5
SE	822	666	93	14.0
SI	99	99	8	8.1
SK	77	53	18	34.0
TR	459	358	26	7.3
Total	8,089	7,103	1,154	16.2

Source: StudyPortals' database on ETPs in addition with ETPs identified with the help of the Institutional Survey
[1] Per contact person the number of ETPs included in the sample was limited to a maximum of 10 ETPs.

As explained earlier, the study had been designed in such a way that the data necessary to answer our questions would become available through two sources: a) the Institutional Survey and b) the data bases of StudyPortals, a leading web platform for the provision of information about study programmes at higher education institutions in European countries but also beyond Europe. Especially through the cooperation with StudyPortals, the information base on the number of institutions offering ETPs and the number of ETPs is much more comprehensive than it was in the previous ACA studies published in 2002 and 2008. On the other hand, there are downsides. The very strong growth of ETPs observed since the first survey in 2001 might be slightly misleading. The numbers went up from the originally 725 programmes identified in 2001, to 2,389 in 2007 and to 8,089 in the present study. The authors have no reason to mistrust the data of the present study, but it could easily be that our earlier studies produced an undercount of ETPs, since the StudyPortals database did not yet exist, and the 2001 and 2007 surveys might have failed to identify a considerable number of ETPs.

The number of students enrolled in ETPs became available solely through the Institutional Survey. Since a substantial number of institutions did either not return the Institutional Questionnaire at all, or did not answer the questions on enrolment, the body of data on enrolment is more incomplete (and thus slimmer), which obviously entails that the conclusions derived from the enrolment information should be looked at with some reservations.

2 Status quo and quantitative trends in the provision of ETPs

Before presenting detailed findings about institutions offering ETPs and major characteristics of this kind of study programmes, the authors found it useful to provide an overview of the main quantitative trends with regard to three questions. First, is ETPs a sizeable phenomenon at all? Second, which of the 28 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, in which way has the offer of programmes taught in English changed during the past thirteen years?

As described in detail in Sub-section 1, the study had been designed in a way that the data necessary to answer these questions would become available through three sources: a) the Institutional Survey, b) the Programme Survey and c) the ETP database of StudyPortals.

To remind readers we would like to recall some key findings contained in Table I.1 and I.2 in the previous section:

The total number of ETPs identified (not of those addressed, see earlier section) in all countries covered by the 2014 surveys was 8,089. This is an enormous growth on the number of programmes identified in 2007 (2,389). In percentage terms, growth in this period amounts to 239%.

The leading country with the highest offer of ETPs in terms of absolute numbers – which, we know, favour countries with large populations and higher education systems and are in this section always presented together with 'weighted' values expressed in percentages – is the Netherlands (1,078 programmes) closely followed by Germany (1,030 programmes). Sweden is now at the third place, at 882 ETPs, ahead of France (499) and Denmark (494) (Table I.2).

2.1 Spread of ETPs and size of enrolment

In order to draw a realistic picture of the relative importance of ETPs, three particular questions needed to be answered:

– How many higher education institutions offer ETPs, and what is their proportion of all higher education institutions addressed in the study?

– How many ETPs 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 ETPs, and what is their proportion of

all students enrolled in the higher education institutions addressed in the study?

Overall, 27% of higher education institutions addressed in the study offer ETPs and about six percent of all study programmes are provided in English. Despite these remarkable figures, the small proportion of students enrolled in ETPs (1.3%) makes it clear that ETPs are still a rare option for the student population as a whole (Table I.3).

Table I.3

Indicators for the quantitative importance of ETPs – by region (%)

	Region						Total
	Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	
Proportion of higher education institutions offering ETPs	60.6	38.7	44.5	19.9	17.2	18.3	26.9
Proportion of study programmes fully provided in English	19.9	10.3	9.9	5.0	2.8	2.1	5.7
Proportion of students enrolled in ETPs in the academic year 2013/14	5.3	1.7	2.2	1.0	0.5	0.8	1.3

Sources: Institutional Survey, Programme Survey, StudyPortals, EUROSTAT

A comparison by region[13] shows considerable differences in the spread of ETPs and size of enrolment (see Table I.3). Most common are ETPs in the Nordic region where 61% of institutions offer Bachelor and/or Master programmes completely taught in English, where ETPs make up 20% of all programmes, and where five percent of total enrolment is in ETPs. Central West Europe and the Baltic states follow with a substantial proportion of institutions offering ETPs (44.5% and 38.7% respectively), a share of ETPs at about 10% of all study programmes and an enrolment share of about two percent. In all other regions at most one fifth of institutions are running ETPs, at most

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[13] The countries covered by this study were allocated to the following regions: Baltic region (Estonia, Latvia, Lithuania), Central East Europe (Czech Republic, Hungary, Poland, Slovenia, Slovak Republic), Central West Europe (Austria, Belgium, Germany, Switzerland, the Netherlands), Nordic region (Denmark, Finland, Iceland, Norway, Sweden), South East Europe (Bulgaria, Croatia, Cyprus, Greece, Romania, Turkey), and South West Europe (France, Italy, Portugal, Spain).

five percent of all programmes are ETPs and not more than one percent of students are enrolled.

Within the individual regions, substantial differences between countries could be observed (see Table I.4):

– *Nordic region:* The highest share of institutions offering ETPs could be found in Finland (83%) and Sweden (81%) while Denmark is top with respect to the proportion of programmes taught in English (38%) and the number of students enrolled (12%).

– *Baltic States:* Lithuania has the highest proportion of institutions offering ETPs (49%) while the three Baltic States differ only marginally according to the other two criteria.

– *Central West Europe:* The Netherlands is the outstanding provider of ETPs in this region (65% of institutions offering ETPs, 30% of the programmes are ETPs and seven percent of students are enrolled in ETPs). Another country with a high proportion of programmes taught in English is Switzerland (14% of all study programmes are ETPs).

– *Central East Europe:* Hungary has the highest proportion of institutions offering ETPs (35%). Slovenia on the other hand is on the last place in this respect (9%), but it has the highest share of ETPs (10% of all study programmes are ETPs) and the highest enrolment in ETPs (3% of all students are ETP students) in the region.

– *South West Europe:* No remarkable differences can be observed between France, Portugal, Spain and Italy. Overall, values in all countries of the region are low.

– *South East Europe:* Cyprus is outstanding according to all criteria (48% of institutions offering ETPs, 26% of the programmes are ETPs and seven percent of students are enrolled in ETPs).

Table I.4

Indicators for the quantitative importance of ETPs – by region and country (%)

	Proportion of higher education institutions offering ETPs	Proportion of study programmes provided in English	Proportion of students enrolled in ETPs in the academic year 2013/14
Nordic countries	60.6	19.9	5.3
DK	48.0	38.0	12.4
FI	83.3	23.2	2.9
IS	50.0	3.3	1.6
NO	41.1	8.1	2.4
SE	81.0	24.2	4.4
Baltic countries	38.7	10.3	1.7
EE	30.4	9.1	1.5
LT	48.8	11.0	1.5
LV	33.3	9.9	2.2
Central West Europe	44.5	9.9	2.2
AT	46.6	9.4	1.8
BE	29.2	7.5	1.1
CH	48.7	13.9	2.1
DE	43.3	5.9	1.0
NL	65.0	29.9	7.2
Central East Europe	19.9	5.0	1.0
CZ	27.8	6.3	1.5
HU	35.2	5.5	2.0
PL	17.8	4.9	0.7
SI	8.6	9.9	2.7
SK	21.2	2.3	0.8
South West Europe	17.2	2.8	0.5
ES	20.3	2.3	0.3
FR	16.1	3.4	0.7
IT	19.8	2.9	0.5
PT	14.3	3.0	0.5

	Proportion of higher education institutions offering ETPs	Proportion of study programmes provided in English	Proportion of students enrolled in ETPs in the academic year 2013/14
South East Europe	18.3	2.1	0.8
BG	16.3	1.4	0.1
CY	47.8	25.5	6.6
GR	19.0	1.6	0.1
HR	6.9	1.2	0.1
RO	16.9	1.9	0.3
TR	17.3	19	1.0
Total	26.9	5.7	1.3

Sources: Institutional Survey, Programme Survey, StudyPortals, EUROSTAT

2.2 Proportion of institutions providing ETPs

The total number of higher education institutions forming the gross sample of this study was 3,042.[14] By analysing the database of StudyPortals and with the help of the Institutional Survey, 817 of these institutions could be identified as providers of at least one programme taught in English (a share of 26.9%).

As Table I.5 shows, in absolute numbers, Germany has the largest number of institutions which offer ETPs (154), followed by France (113) and Poland (59). However, absolutes have little analytical value in this case, since the number of higher education institutions per country differs tremendously. Therefore, percentages are much more revealing. In percentage terms, Finland leads the table with 83%, followed by its Nordic neighbour Sweden with 81% as well as the Netherlands (65%) and Iceland (50%). Countries with a share of more than 40% of ETP-providing institutions are Lithuania, Switzerland, Denmark, Cyprus, Austria, Germany and Norway. With percentages below 20, the lowest share of ETP-offering institutions is found in South East Europe (Bulgaria, Romania, Croatia and Turkey) and in two Central East European countries, Slovenia and Poland. This result shows no dramatic deviation from the 2001 and 2007 surveys. There was, at the time, also a 'north-south rift'.

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[14] These included 405 institutions with invalid email or other addresses, so that the net sample amounts to 2,637.

Table I.5

Higher education institutions offering ETPs – by country (absolute numbers and %)

Country	All Institutions [1]	ETP-offering Institutions [2]	Share of ETP-offering institutions of all institutions (%)
AT	73	34	46.6
BE	72	21	29.2
BG	49	8	16.3
CH	39	19	48.7
CY	23	11	47.8
CZ	79	22	27.8
DE	356	154	43.3
DK	50	24	48.0
EE	23	7	30.4
ES	177	36	20.3
FI	42	35	83.3
FR	701	113	16.1
GR	42	8	19,0
HR	29	2	6,9
HU	54	19	35,2
IS	8	4	50.0
IT	207	41	19.8
LT	43	21	48.8
LV	45	15	33.3
NL	60	39	65.0
NO	56	23	41.1
PL	332	59	17.8
PT	98	14	14.3
RO	77	13	16.9
SE	42	34	81.0
SI	70	6	8.6
SK	33	7	21.2
TR	162	28	17.3
Total	3,042	817	26.9

[1] Database of the European Commission on higher education institutions awarded an ERASMUS Charter
[2] Identified with the help of the data base of StudyPortals and the Institutional Survey

2.3 Proportion of programmes provided in English

As can be seen in Table I.6, the highest number of programmes identified through the Institutional Survey and the database of StudyPortals was found in the Netherlands (1,078), followed by the Germany (1,030), Sweden (822), France (499) and Denmark (494). Greece (24) and Croatia (12) reported the smallest numbers.

Measured against the overall number of programmes in Europe, the average proportion of ETPs is about six percent. The lowest proportion can be found in Croatia (1.2%), and the highest in Denmark (38%). The Netherlands (30%), Cyprus (26%), Sweden (24%) and Finland (23%) follow. Apart from the five leaders, only Switzerland and Lithuania have an ETP share of over 10%. South and East European countries are generally at the bottom of the list, with very low values.

Since the 2008 study, Denmark and Sweden have swapped ranks, as the proportion of ETPs in Denmark went up by more than 50%: Even bigger increases in the past seven years can be observed in the cases of Sweden and Cyprus. In the 2007 surveys, the maximum values for these two countries were 5.8% and 11.5% respectively.

Table I.6

Overall number of programmes and number of ETPs – by country (absolute numbers and %)

Country	Estimated number [1] of programmes	Number of ETPs [2]	Proportion of ETPs of all programmes (%)
AT	2,400	225	9.4
BE	2,700	202	7.5
BG	2,300	32	1.4
CH	1,700	236	13.9
CY	400	102	25.5
CZ	3,200	202	6.3
DE	17,500	1,030	5.9
DK	1,300	494	38.0
EE	650	59	9.1
ES	18,500	417	2.3
FI	1,700	395	23.2
FR	14,500	499	3.4

Country	Estimated number [1] of programmes	Number of ETPs [2]	Proportion of ETPs of all programmes (%)
GR	1,500	24	1.6
HR	1,000	12	1.2
HU	3,300	183	5.5
IS	1,000	33	3.3
IT	10,500	307	2.9
LT	1,700	187	11.0
LV	1,000	99	9.9
NL	3,600	1,078	29.9
NO	2,300	187	8.1
PL	8,300	405	4.9
PT	4,600	139	3.0
RO	4,500	85	1.9
SE	3,400	822	24.2
SI	1,000	99	9.9
SK	3,400	77	2.3
TR	24,000	459	1.9
Total	141,950	8,089	5.7

[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] Identified with the help of the data base of StudyPortals and the Institutional Survey

2.4 Enrolment in ETPs

The overall number of students enrolled in ETPs estimated on the basis of the information provided by institutions and Programme Directors is about 291,000 (academic year 2013/14). Of these, the far largest numbers are found in the Netherlands (57,000), in Denmark (34,000), Germany (30,500), and Sweden (20,000) (see Table I.7).

Table I.7

Overall number of all students in 2012 and of students enrolled in ETPs in the academic year 2013/14 – by country (absolute numbers and %)

Country	Total number of students [1]	Estimated number of ETP students [2]	Share of ETPs of all students (%)
AT	376,500	6,750	1.8
BE	477,700	5,350	1.1
BG	285,000	350	0.1
CH	269,600	5,700	2.1
CY	31,800	2,100	6.6
CZ	440,200	6,500	1.5
DE	2,939,500	30,500	1.0
DK	275,000	34,000	12.4
EE	67,600	1,000	1.5
ES	1,965,800	5,500	0.3
FI	308,900	9,000	2.9
FR	2,296,300	15,000	0.7
GR	663,700	400	0.1
HR	157,300	150	0.1
HU	380,800	7,600	2.0
IS	19,100	300	1.6
IT	1,925,900	10,500	0.5
LT	175,100	2,600	1.5
LV	97,000	2100	2.2
NL	793,700	57,000	7.2
NO	238,200	5,600	2.4
PL	2,007,200	13,200	0.7
PT	390,300	1,900	0.5
RO	705,300	2,000	0.3
SE	453,300	20,100	4.4
SI	104,000	2,800	2.7
SK	221,200	1,850	0.8
TR	4,353,500	41,500	1.0
Total	22,419,500	291,350	1.3

[1] Source: EUROSTAT student numbers for the year 2012.
[2] The data were collected with the help of the Institutional and the Programme Questionnaire. The number of students in ETPs which did not provide numbers was estimated on the basis of the available information about the median number of students per ETP in the respective country.

Looking at the steep growth curve of English-Medium Instruction in Europe since our first publication in 2002, there is only one thing that prevents us from talking of a critical mass which has now been achieved: the very low enrolment rates. On a European average, 1.3% of total enrolment is in ETPs. There are only few countries with a share of students in ETPs above two percent. With 12%, Denmark leads, followed by the Netherlands and Cyprus with seven percent each, and Sweden with four percent.

2.5 Leading countries in the provision of ETPs

In order to arrive at an overall (average) ranking of the individual countries as providers of ETPs, the three indicators used above were transformed into one single value. This was calculated by making the sum of each country's rank rank (in relative, not in absolute, terms) for the three indicators, i.e.

– institutions offering ETPs

– study programmes fully taught in English, and

– 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 study programmes provided in English, and which ones score poorly.

The Netherlands, Denmark and Sweden, in that order, are the European leaders in the provision of higher education provided in English, followed by Finland, Cyprus, Switzerland, Lithuania and Latvia. Countries such as Hungary and Germany form a middle group, while South Europe very much lags behind (see Table I.8).

Overall, it is remarkable that all five Nordic countries, as well as all three Baltic ones, are amongst the first twelve countries. The Nordics have consistently been on top ranks in our earlier studies. The new runner ups are clearly the Baltics.

Table I.8

Ranks of individual countries by three different criteria measuring the provision of ETPs

Country	Institutions offering ETPs Rank	Programmes taught in English Rank	Enrolment of students in ETPs Rank	Mean value	Rank
NL	3	2	2	2.3	1
DK	7	1	1	3.0	2
SE	2	4	4	3.3	3
FI	1	5	5	3.7	4
CY	8	3	3	4.7	5
CH	6	6	9	7.0	6
LT	5	7	13	8.3	7
LV	13	8	8	9.7	8
AT	9	10	11	10.0	9
NO	11	12	7	10.0	9
IS	4	19	12	11.7	11
EE	14	11	13	12.7	12
HU	12	16	10	12.7	12
SI	27	8	6	13.7	14
DE	10	15	17	14.0	15
CZ	16	14	13	14.3	16
BE	15	13	16	14.7	17
PL	21	17	20	19.3	18
SK	17	22	19	19.3	18
IT	19	21	22	20.7	20
FR	25	18	20	21.0	21
TR	22	24	17	21.0	21
ES	18	22	24	21.3	23
PT	26	20	22	22.7	24
RO	23	24	24	23.7	25
GR	20	26	26	24.0	26
BG	24	27	26	25.7	27
HR	28	28	26	27.3	28

Source: Own calculations.

The overall ranking confirms the 2002 and 2008 pattern of a 'north-south divide'. The Netherlands is still on the top place and Sweden and Denmark have moved further to the top. The Baltics have moved up the list as Table I.8 shows. Lithuania and Latvia are in the top 10 group and Estonia is slightly below, in 12th place.

2.6 Change from 2007 to 2014

In the period since the last study in 2007, substantial growth in the number of ETPs could be observed in Europe. From 2,389 programmes identified in 2007 we have arrived to 8,089 programmes in 2014, i.e. the number has more than trebled in the past seven years. As Table I.9 shows, the growth rates were highest in South West Europe (866%) and in the Baltic States (516%). While most South European countries are still at the bottom of the ranking list - despite the impressive growth rates – the Baltic States have climbed up significantly during the past seven years. The pioneers in the implementation and running of ETPs, i.e. the countries in the Nordic region and in Central West Europe, are characterised by growth rates below the average. This is of course no surprise, given their leading role, where further growth becomes more and more difficult.

Table I.9

ETPs identified in 2007 and 2014 – by region in which the institutions are located (absolute numbers)

	Region						Total
	Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	
ETPs identified in 2007	508	56	1,307	204	141	173	2,389
ETPs identified in 2014	1,931	345	2,771	966	1,362	714	8,089
Growth rates from 2007 to 2014 (%)	280	516	112	374	866	313	239

Sources: 2007: Institutional Survey and national databases on ETPs; 2014: StudyPortals and Institutional Survey

What applies to absolute numbers is equally true of percentages. The share of ETPs of all programmes in 2007 was about two percent. In the present study, the value has tripled to 5.7% (Table I.10). The proportion of higher education institutions offering ETPs has also increased: from 18% in 2007 to 27% in 2014. How has student enrolment developed in the last seven years? Low as the numbers of students enrolled in English-medium programmes in the present study may still be, they are up considerably from 2007 (from 0.7% to 1.3%).

The increase in proportions of institutions offering ETPs, the proportion of ETPs as compared to all study programmes and the average increase of students enrolled in ETPs is not only a general trend but could also be observed in most regions. In the Nordic region the highest increase with respect to all criteria could be observed, followed by the Baltic States and Central West Europe. On the other hand, only minor changes take place in South East Europe and in Central East Europe.

Table I.10

ETPs identified in 2007 and 2014 – by region (%)

	Region						Total
	Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	
Proportion of higher education institutions offering ETPs							
2007	31.5	25.0	22.6	19.9	7.6	20.7	18.1
2014	60.6	38.7	44.5	19.9	17.2	18.3	26.9
Proportion of study programmes provided in English							
2007	5.9	1.7	4.0	1.6	0.5	1.1	2.1
2014	19.9	10.3	9.9	5.0	2.8	2.1	5.7
Proportion of students enrolled in ETPs							
2007	1.7	0.8	1.2	0.4	0.1	0.8	0.7
2014	5.3	1.7	2.2	1.0	0.5	0.8	1.3

Sources: Institutional Survey, Programme Survey, StudyPortals, EUROSTAT

3 Drivers and reasons for introducing ETPs

3.1 The institutional context

What type of institution provides ETPs – and what type does not? Are the research-oriented universities which award degrees up to PhD level more likely than Bachelor-only colleges to offer English-medium programmes? Do larger institutions – in terms of student enrolment – offer ETPs more often than smaller ones? How does the degree of internationalisation of an institution – measured by its share of foreign students – impact on the provision of ETPs? These are the questions which are raised in this section to prove the relevance of the institutional context for the provision of ETPs.

In the current study we distinguish institutions by the highest academic degree awarded, i.e. Bachelor, Master or PhD. Almost half of the institutions in the sample (47%) offer academic programmes up to the PhD level and 35% of the sample award degrees up to the Master level. The Bachelor is the highest degree awarded at only 20% of the sample and a few institutions stated as highest degree a short-cycle qualification (which we had actually excluded from the study). As Table I.11 shows, there is a strong link between the offer of ETPs and the highest degree awarded. While two thirds of the research-oriented universities awarding degrees up to PhD provide ETPs, this is only the case for about one third of the Master-level institutions and a mere one fifth of Bachelor-level institutions.

Table I.11

ETPs offered at higher education institutions – by type of institution (%)

	Highest degree awarded				Total
	Sub-Bachelor	Bachelor or equivalent	Master or equivalent	Doctoral degree	
No	100	80	65	32	53
Yes	0	20	35	68	47
Total	100	100	100	100	100
Count (n)	(32)	(164)	(375)	(486)	(1,057)

Source: Institutional Questionnaire
Question 2.1: Does your institution offer ETPs that conform to the definition above?

A second important factor influencing the implementation and running of ETPs is the size of the student population. Table I.12 displays a clear correspondence between the size of an institution and its likelihood to offer ETPs according to the definition of the study. While only 14% of small institutions with at most 500 students offer ETPs, the proportion is 52% at institutions of medium size, i.e. 2,501-5,000 students, and 81% in the case of large universities with more than 10,000 students. Not surprisingly, size turns out to be one of the strongest determinants for the existence of ETPs. Larger institutions offer more programmes (of any kind) than smaller ones and are therefore 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 ETPs.

Table I.12

ETPs offered at Bachelor or Master level – by number of students enrolled (%)

	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	
No	86	78	57	48	34	19	54
Yes	14	22	43	52	66	81	46
Total	100	100	100	100	100	100	100
Count (n)	(244)	(141)	(154)	(135)	(130)	(235)	(1,039)

Source: Institutional Questionnaire
Question 2.1: Does your institution offer ETPs that conform to the definition above?

There is also a link between the volumes of enrolment of foreign students and the fact that an institution offers ETPs. The percentage of institutions offering programmes in English rises in parallel with the percentage of foreign students: from 21% of those with a share of foreign students up to 1% to 61% with a foreign student share of five percent. A higher share of foreign students than five percent, however, seems to have no further impact (see Table I.13).

Table I.13

ETPs offered at Bachelor or Master level – by % of foreign students enrolled

	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	
No	79	66	39	39	36	54
Yes	21	34	61	61	64	46
Total	100	100	100	100	100	100
Count (n)	(196)	(260)	(215)	(188)	(131)	(990)

Source: Institutional Questionnaire
Question 2.1: Does your institution offer ETPs that conform to the definition above?

3.2 Reasons for offering ETPs

Both Institutional Coordinators and Programme Directors were asked to state the relative importance of the following reasons for the introduction of ETPs:

– *Sharpening of the international profile of the institution*, e.g. in comparison to other institutions in their own country or as a driver to foster partnerships with institutions from other countries, e.g. by setting up double degree or exchange programmes.

– *Abolition of language obstacles for the enrolment of foreign students*, i.e. to attract foreign students who would not enrol in a programme taught in the domestic language.

– *Improvement of international competences of domestic students* by fostering the intercultural understanding and competences of domestic students, by enriching learning through study together with students from different national/cultural backgrounds and by making domestic students 'fit' for global/international labour markets.

– *Compensation of shortages of the institution*, e.g. to counterbalance a lack of enrolment of domestic students or to improve the income base of the institution through revenue from tuition fees paid by foreign students.

– *Brain gain*, i.e. recruitment of international academic staff and top talents, e.g. PhD students, and attraction of foreign students as a future work force for their own country/region.

– *Altruistic motive*, i.e. to contribute to the development of the 'Third World' by providing high level education for students from respective countries.

The vast majority of Institutional Coordinators and Programme Directors considered not only a single but several reasons as important for the introduction of ETPs. Both from the perspective of the institutional, as well as the programme level, ETPs serve mainly as a means to remove language obstacles for the enrolment of foreign students and for the improvement of international competences of domestic students. Four out of five Institutional Coordinators and Programme Directors stated the importance of these two functions (see Table I.14). A further important motive is the possible contribution of ETPs to the sharpening of the international profile of the institution in two directions: a) in comparison to other institutions in their own country and b) for fostering partnerships with institutions from other countries. Institutional Coordinators stressed the relevance of ETPs for the second aspect more often than Programme Directors (79% as compared to 63%).

'Brain gain' turns out to be also a strong driver for the introduction of ETPs for the majority of Institutional Coordinators and Programme Directors. About two thirds each stated that ETPs should help to attract top talents to the institution, e.g. PhD students. The importance of ETPs for the attraction of international academic staff is more often highlighted by respondents at the institutional level (60% as compared to 44% of the Programme Directors) while about half of both groups agreed that foreign students could contribute to the future work force for the own country/region.

The 'altruistic motive' of providing high-level education for students from developing countries is not top-ranked, but still plays an astoundingly strong role (44% of the Institutional Coordinators and 43% of the Programme Directors).

Compensation of shortages of the institution by counterbalancing a lack of enrolment of domestic students or by improving the income base of the institution through tuition fees from foreign students is least often stated as an important reason for the introduction of ETPs. Only about one third of the Institutional Coordinators and a quarter of the Programme Directors considered these issues as relevant.

Table I.14

Important reasons of Institutional Coordinators and Programme Directors for the introduction of ETPs (%*)

	Institutional Coordinators	Programme Directors
Abolition of language obstacles for the enrolment of foreign students		
To attract foreign students who would not enrol in a programme taught in the domestic language	81	79
Improvement of international competences of domestic students		
To enrich learning through joint study with students from different national/cultural backgrounds	76	78
To make domestic students fit for global/international markets	85	75
To serve to the intercultural understanding and competences of domestic students	77	66
Sharpening the international profile of the institution		
To sharpen the profile of your institution in comparison to other institutions in the own country	74	71
To foster partnerships with institutions from other countries, e.g. by setting up double degree or exchange programmes	79	63
Brain Gain		
To attract top talents to the institution, e.g. PhD students	67	68
To attract international academic staff	60	44
To attract foreign students as a future highly qualified work force for your region/country	49	45
Altruistic motives		
To provide high level education for students from the Third World (as a mean of development aid)	44	43
Compensation of shortages of the institution		
To counterbalance a lack of enrolment of domestic students in certain subject areas by foreign students	31	29
To improve the income base of the institution through revenue from tuition fees paid by foreign students	36	24
Count (n)	(417)	(793)

Source: Institutional Questionnaire
Question 3.1: What are the objectives your institution is trying to reach by offering the existing ETPs and how important are these aims for your institution?
* Scale points 5 and 4 on a scale from 1 = 'not important at all' to 5 = 'very important'

Substantial differences in the reasons for introducing and running ETPs could be observed between institutions located in the Nordic region and Central West Europe on the one hand and institutions located in South and East Europe on the other hand. Taking into account only those aspects considered of similar importance by Institutional Coordinators and Programme Directors, the largest difference is the role of ETPs for the compensation of shortages of the institutions, i.e. for improving the income base of the institution through tuition fees gathered from foreign students and for counterbalancing a lack of enrolment of domestic students (see Table I.15 and I.16). These aspects are far more often a motive for institutions from the Baltic States, from Central East Europe and from South East Europe than for institutions from other regions. Institutions from south European countries most often stated the improvement of international competences of domestic students as the major goal. It could be assumed that the high unemployment rates in these countries have contributed to the importance of this aim. It might be also interesting to note that Institutional Coordinators and Programme Directors from institutions in the Nordic region stated only one aspect more often as important as their colleagues from other regions: to attract foreign students as future highly qualified work force for the own country.

Table I.15

Important reasons of Programme Directors for the introduction of ETPs – by region (%*)

Removal of language obstacles for the enrolment of foreign students
To attract foreign students who would not enrol in a programme taught in the domestic language
Improvement of international competences of domestic students
To enrich learning through joint study with students from different national/cultural backgrounds
To make domestic students fit for global/international markets
To serve to the intercultural understanding and competences of domestic students
Sharpening the international profile of the institution
To sharpen the profile of the institution in comparison to other institutions in your own country
To foster partnerships with institutions from other countries, e.g. by setting up double degree or exchange programmes
Brain Gain
To attract top talent to the institution, e.g. PhD students
To attract international academic staff
To attract foreign students as a future highly qualified work force for the own region/country
Altruistic motives
To provide high level education for students from the Third World (as a mean of development aid)
Compensation of shortages of the institution
To counterbalance a lack of enrolment of domestic students in certain subject areas by a higher enrolment of foreign students
To improve the income base of the institution through revenue from tuition fees paid by foreign students
Count (n)

Source: Programme Questionnaire
Question 4.1: What are the current aims you pursue with the English-Taught Programme and how important are these?
* Scale points 5 and 4 on a scale from 1 = 'not important at all' to 5 = 'very important'

Region						Total
Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	
73	70	81	79	89	68	79
76	78	81	64	85	75	78
67	74	74	75	82	87	75
60	76	65	67	69	72	66
58	78	70	77	78	90	71
42	72	60	68	82	83	63
62	62	74	55	74	60	67
34	64	43	48	45	53	44
54	43	46	23	50	47	45
29	45	41	52	51	39	42
24	41	23	39	31	35	29
10	55	10	55	26	45	24
(171)	(40)	(267)	(121)	(167)	(32)	(798)

Table I.16

Important reasons of Institutional Coordinators for the introduction of ETPs – by region (%*)

Removal of language obstacles for the enrolment of foreign students	
To attract foreign students who would not enrol in a programme taught in the domestic language	
Improvement of international competences of domestic students	
To enrich learning through joint study with students from different national/cultural backgrounds	
To make domestic students fit for global/international markets	
To serve to the intercultural understanding and competences of domestic students	
Sharpening the international profile of the institution	
To sharpen the profile of the institution in comparison to other institutions in your own country	
To foster partnerships with institutions from other countries, e.g. by setting up double degree or exchange programmes	
Brain Gain	
To attract top talent to the institution, e.g. PhD students	
To attract international academic staff	
To attract foreign students as a future highly qualified work force for the own region/country	
Altruistic motives	
To provide high level education for students from the Third World (as a mean of development aid)	
Compensation of shortages of the institution	
To counterbalance a lack of enrolment of domestic students in certain subject areas by a higher enrolment of foreign students	
To improve the income base of the institution through revenue from tuition fees paid by foreign students	
Count (n)	

Source: Institutional Questionnaire
Question 3.1: What are the objectives your institution is trying to reach by offering the existing ETPs and how important are these aims for your institution?
* Scale points 5 and 4 on a scale from 1 = 'not important at all' to 5 = 'very important'

The aims associated with ETPs further differ between the Bachelor and the Master level (see Table I.17). Programme Directors of Master programmes more frequently highlighted the importance to abolish language obstacles for the enrolment of foreign students (82% in comparison to 68%) and to attract

	Region					Total
Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	
87	67	84	75	84	79	81
85	91	81	80	91	90	85
78	95	67	74	88	80	77
82	73	70	63	91	81	76
66	77	73	80	91	90	79
66	91	75	79	65	80	74
65	57	66	68	68	76	67
57	77	50	65	59	71	60
57	41	47	46	46	55	49
46	27	35	48	44	69	44
14	86	14	69	26	60	36
15	68	29	48	20	36	31
(69)	(22)	(119)	(82)	(82)	(43)	(417)

top talents like PhD students (74% compared to 40%). Directors of Bachelor programmes on the other hand put more emphasis as Directors of Master programmes on the role of ETPs for the improvement of international competences of domestic students, the sharpening of the international profile of the institution and the compensation of shortages of the institution. For contextualisation, we would like to point out that 80% of all ETPs identified by us were Master programmes.

Table I.17

Important reasons of Programme Directors for the introduction of ETPs – by degree awarded at the end of the programme (%*)

	Degree awarded		Total
	Bachelor	Master	
Abolition of language obstacles for the enrolment of foreign students			
To attract foreign students who would not enrol in a programme taught in the domestic language	68	82	79
Improvement of international competences of domestic students			
To enrich learning through joint study with students from different national/cultural backgrounds	79	78	78
To make domestic students fit for global/ inter-national markets	84	73	75
To serve to the intercultural understanding and competences of domestic students	77	63	66
Sharpening the international profile of the institution			
To sharpen the profile of your institution in comparison to other institutions in the own country	78	70	71
To foster partnerships with institutions from other countries, e.g. by setting up double degree or exchange programmes	73	61	63
Brain Gain			
To attract top talents to the institution, e.g. PhD students	40	74	68
To attract international academic staff	45	45	45
To attract foreign students as a future highly qualified work force for your region/country	51	42	44
Altruistic motives			
To provide high level education for students from the Third World (as a mean of development aid)	43	42	43
Compensation of shortages of the institution			
To counterbalance a lack of enrolment of domestic students in certain subject areas by foreign students	39	26	29
To improve the income base of the institution through revenue from tuition fees paid by foreign students	41	20	24
Count (n)	(147)	(646)	(793)

Source: Programme Questionnaire
Question 4.1: What are the current aims you pursue with the English-Taught Programme and how important are these?
* Scale points 5 and 4 on a scale from 1 = 'Not important at all' to 5 = 'very important'

3.3 Reasons for not offering ETPs

The universities and colleges which participated in the Institutional Survey and did not offer programmes taught in English at all or only programmes partly taught in English were asked in an open question to explain why they did not do so. An analysis of the answers shows that there are several main reasons or groups of perceived obstacles to offering ETPs.

a) Language proficiency

Institutional Coordinators in the sample mentioned several reasons related to language proficiency issues which account for not providing ETPs, such as low levels of proficiency in English among teaching staff, low-level of English skills amongst domestic students or, on the other hand, high proficiency of foreign students in the domestic language. Low English skills of teachers were mentioned quite frequently as the major reason for not introducing ETPs. Institutional Coordinators mentioned poor language skills of teaching staff, and, understandably, a resulting reluctance to teach in English. On the other hand, in countries with more widely spoken languages, such as Germany, France or Spain, the perception is often that there is no need to introduce programmes fully taught in English since foreign students already speak or want to learn the domestic language.

b) Type of higher education institution and discipline

A significant number of responses refer to specificities of the institution which make ETPs unnecessary, difficult to introduce or even incompatible with the discipline taught. For example, a number of institutions in the sample are academies of music or the arts where instruction is, in part, on a one-to-one basis and where it is therefore quite common to flexibly agree on the language which the student and the teacher master best. On the other hand, some institutions offer programmes with highly specialised terminology which students have to master in the domestic language, as is, for example, the case in teacher training or law.

c) Insufficient international enrolment

Quite a few Institutional Coordinators mentioned a low number of foreign students as the main reason for not providing ETPs. In some cases it was considered too expensive to set up courses for just a few students so foreign students are required to learn the language of instruction in case they do not yet speak it. According to some Institutional Coordinators, though, there is simply no interest in English-Taught courses among the few foreign students in their institution. Some institutions, on the other hand, are involved only in ERASMUS exchanges and have adapted part of the curriculum to cater for exchange students, or have

established bilateral agreements with institutions abroad on the understanding that incoming students master the domestic language.

These answers struck us as quite surprising. A lack of sufficient demand for ETPs could only safely be identified if there was an ETP offer at all. Likewise, a lack of demand for ETPs among foreign students already studying at the institution is not surprising, since these appear to have been admitted on the condition that they speak – or are willing to learn – the domestic language.

d) Lack of resources

Another obstacle which Institutional Coordinators identified frequently is the lack of funding and human resources. The survey conducted with representatives of regional and national governments confirms that there is a lack of incentives for the introduction of programmes fully taught in English. This appears to negatively affect the development of ETPs even if there are no major legal constraints.

e) Legal obstacles

In some countries, the absence of ETPs stems from the limitations imposed by the national or regional legislative and regulatory framework. For example, this seems to be often the case in Spain, where the curriculum depends on regional authorities and institutions do not have enough autonomy to design study programmes.

In some countries such as the Netherlands, the Dutch and French-speaking communities of Belgium and a number of Central European countries, there is the requirement to double an ETP in the domestic language. We have gained the impression that this requirement is often hypothetical, as long as no national of the country insists to be taught in the domestic language. Where it is seriously applied, it raises issues of human resources and ultimately also funds.

Accreditation, i.e. a lack of accreditation of ETPs is another major obstacle, according to the Institutional Coordinators from a number of countries. It appears to be a major hurdle in the Czech Republic, as well as in some institutions in Hungary, Romania, Slovakia and Slovenia. We were somewhat astonished by these comments, assuming that higher education institutions 'cleared' by their country for participation in English should, in principle, be eligible for accreditation by the country's authorities.

Many institutions are in the process of launching one or more ETPs or have just started an ETP so there are no data available yet. Some institutions surveyed are very young and are still building the infrastructure but a number of Institutional Coordinators mentioned the intention of introducing programmes taught in English in the next one or two years.

Part II – Traits and daily operation of ETPs

Irina Ferencz (ACA), Friedhelm Maiworm (GES), Marija Mitic (ACA)

The previous part provided an overview of the state of play and trends in the development of ETPs in the 28 European countries in the sample. It looked into the spread of ETPs, the leaders among countries in the provision of ETPs as well as the changes over years. It also provided an analysis of the drivers and reasons for the introduction of ETPs. The second part of the study examines some basic traits of this kind of programmes and their daily operation. More specifically, it looks at the age of programmes, their disciplinary profiles, at the levels of study (Bachelor/Master), at the standard period of study, at the admission conditions, marketing and at the challenges faced during the implementation of the programmes. Further, it tries to answer the important question as to where the students enrolled in ETPs come from.

1 Age of programmes – year of introduction

The 2002 study came to the conclusion that ETPs were "a very young phenomenon" and the 2008 study found a continued strong growth in the creation of respective offers. However, the current study suggests that the peak of the introduction of new ETPs is over and we are now in a phase of consolidation of existing offers.

Chart II.1 shows the distribution of ETPs covered in the current study by year of introduction. The figure shows a continuous increase in the proportion of newly introduced programmes until the years 2009-2010 (from 6% in the years 2001-2002 up to 21%). In the following years, the respective share decreased to 17% in 2011-2012 and to 13% in 2013-2014. Although it has to be taken into consideration that the study did not cover the complete year 2014 and that the real number of programmes starting in 2013-2014 will finally be higher, it is not very likely it will top the numbers of 2009-2010. Under the assumption that the sample of ETPs covered by the study is largely representative, it might be justified to conclude that after the peak in 2009-2010, the growth in the number of new ETPs has at least temporarily ended, although the total number of ETPs continues to increase.

Chart II.1

Proportion of newly introduced ETPs – by year of introduction of programme (%)
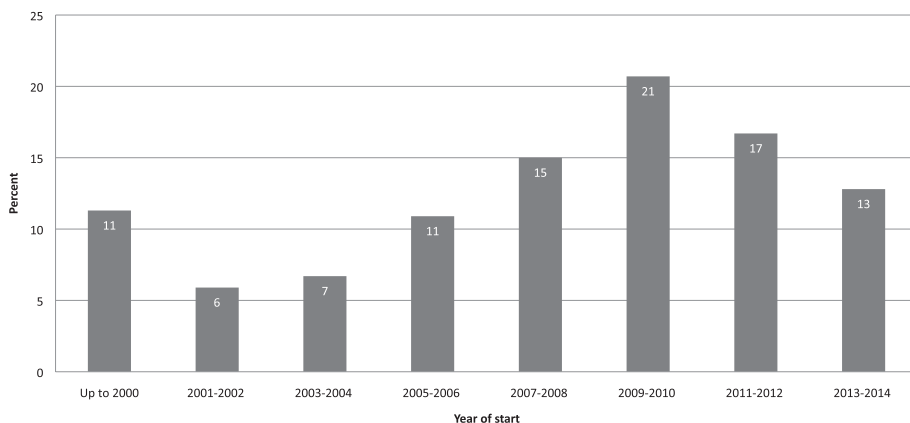
Source: Programme Questionnaire
Question 2.4: Year in which this programme was set up:

As was already the case in the predecessor studies, the 'age' of ETPs differs between countries, as shown in the Table II.1. A high proportion of programmes starting in recent years, i.e. since 2011, could be found in South West and Central East Europe (37% and 35% respectively) and in the Baltics (33%).

Table II.1

Year of introduction of the ETPs – by region (%)

	Region						Total
	Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	
Up to 2000	13	10	13	13	3	27	11
2001-2005	13	17	24	17	10	5	16
2006-2010	48	40	38	35	50	46	43
2011-2014	26	33	25	35	37	22	30
Total	100	100	100	100	100	100	100
Count (n)	(190)	(48)	(283)	(136)	(186)	(41)	(884)

Source: Programme Questionnaire
Question 2.4: Year in which this programme was set up:

2 ETPs by study levels

ETPs in Europe are predominantly offered in the second cycle (Master level). Four fifths of all programmes (80%) belong to this category. Only 20% are Bachelor programmes. These figures are identical to those found in 2007.

There are some variations by country groups (see Table II.2). ETPs in South East Europe (61%), Central East Europe (42%) and the Baltics (34%) lead more often to a Bachelor degree than the average of all programmes. On the contrary, the dominance of Master programmes is strongest in the Central West (91%), South West (91%) and the Nordic countries (82%).

Table II.2

Degree awarded at the end of the ETPs – by region (%)

	Region						Total
	Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	
Bachelor or equivalent	18	34	9	42	9	61	20
Master or equivalent	82	66	91	58	91	39	80
Total	100	100	100	100	100	100	100
Count (n)	(196)	(47)	(296)	(136)	(186)	(41)	(902)

Source: Programme Questionnaire
Question 2.6: Which degree is being awarded at the end of the programme?

If we compare the introduction of Bachelor and Master programmes over the last decades, it could be shown that Master programmes were always the dominant type (see Table II.3). However, the proportion of Bachelor ETPs up to the year 2000 was about one third. Between 2001 and 2010 only each sixth newly introduced programme led to a Bachelor degree. Since 2011 a slight increase to one fifth could be observed.

Table II.3

Degree awarded at the end of the ETPs – by year of introduction of the programme (%)

	Year of introduction				Total
	Up to 2000	2001-2005	2006-2010	2011-2014	
Bachelor or equivalent	36	15	17	21	20
Master or equivalent	64	85	83	79	80
Total	100	100	100	100	100
Count (n)	(99)	(144)	(376)	(259)	(878)

Source: Programme Questionnaire
Question 2.6: Which degree is being awarded at the end of the programme?

3   Subject areas covered by ETPs

According to the ISCED 2011 classification of broad groups and fields of education, the highest proportion of ETPs covered by the survey is offered in social sciences, business and law (35%), followed by sciences (23%) and engineering, manufacturing and construction (18%). While the data does not allow for this differentiation, we would expect that in the field social sciences, business and law the majority of ETPs are offered in business and law studies, rather than in social sciences. All other subject areas remain below 10% although a large variety of subjects are available as ETPs in Europe as indicated in Study-Portals' database.

Table II.4

**Subject areas to which the ETPs mainly belong – by year
of introduction of the programme (%)**

	Year of introduction				Total
	Up to 2000	2001-2005	2006-2010	2011-2014	
Agriculture	6	3	1	1	2
Education	0	3	1	3	2
Engineering, manufacturing and construction	23	19	15	20	18
Health and welfare	13	6	4	4	5
Humanities and arts	7	6	7	8	7
Sciences	8	19	29	23	23
Services	2	3	2	1	2
Social sciences, business and law	34	34	38	35	36
Other subject area	6	6	4	5	5
Total	100	100	100	100	100
Count (n)	(99)	(144)	(378)	(260)	(881)

Source: Programme Questionnaire
Question 2.8: To which subject area does your programme (mainly) belong (cf. ISCED 2011 classification of broad groups and fields of education)?

Some changes over time could be observed. While only 8% of the programmes starting until the year 2000 focused on sciences, the respective proportion increased to 29% in the years 2006-2010. At the same time the share of newly established programmes in social sciences, business and law remains stable while new programmes in health and welfare decreased (see Table II.4).

As Table II.5 shows, the overall distribution across disciplines differs by levels of study. The subject area group of social sciences, business and law is the clear leader in undergraduate (Bachelor-level) programmes (42%). Programmes in natural sciences, on the other hand, tend to be offered more often at the Master level (26% as compared to 11% at the Bachelor level).

Table II.5

Subject areas to which the ETPs mainly belong – by degree awarded at the end of the programme (%)

	Degree awarded		Total
	Bachelor	Master	
Agriculture	2	2	2
Education	3	1	2
Engineering, manufacturing and construction	19	18	18
Health and welfare	6	5	5
Humanities and arts	10	7	7
Sciences	11	26	23
Services	3	1	2
Social sciences, business and law	42	34	35
Other subject area	3	6	5
Total	100	100	100
Count (n)	(175)	(725)	(900)

Source: Programme Questionnaire
Question 2.8: To which subject area does your programme (mainly) belong (cf. ISCED 2011 classification of broad groups and fields of education)?

The discipline pattern of ETPs differs between countries and regions to a certain extent, as Table II.6 reveals. On the Master level, Central East Europe and the Baltics have a comparably high proportion of programmes in the fields of social sciences, business and law while sciences are above average in the Central West (33%) and South West Europe (30%) countries. On the Bachelor level, a considerably high proportion of ETPs in social sciences, business and law are offered in South West Europe (75%) while in South East Europe the share of programmes in engineering, manufacturing and construction is clearly above average (46%).

Table II.6

Subject areas to which the ETPs mainly belong – by region (%)

	Region						Total
	Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	
Agriculture							
Bachelor	0	0	0	5	0	0	2
Master	2	3	3	5	1	0	2
Education							
Bachelor	0	7	4	4	6	0	3
Master	1	6	1	3	1	0	1
Engineering, manufacturing and construction							
Bachelor	22	27	4	14	13	46	19
Master	18	10	14	14	25	25	18
Health and welfare							
Bachelor	19	13	4	2	0	0	6
Master	7	3	3	13	3	6	5
Humanities and Arts							
Bachelor	8	13	7	11	0	17	10
Master	8	16	6	13	2	19	7
Sciences							
Bachelor	11	7	11	14	6	8	11
Master	23	10	33	8	30	19	26
Services							
Bachelor	6	0	4	2	0	8	3
Master	1	0	2	1	2	0	1
Social sciences, business and law							
Bachelor	31	33	48	49	75	21	42
Master	35	52	30	42	32	31	34
Other subject area							
Bachelor	3	0	19	0	0	0	3
Master	7	0	8	3	5	0	6
Total	100	100	100	100	100	100	100
Count (n)	(197)	(46)	(296)	(137)	(187)	(41)	(904)

Source: Programme Questionnaire
Question 2.8: To which subject area does your programme (mainly) belong (cf. ISCED 2011 classification of broad groups and fields of education)?

4 Duration and admission requirements

In half of the programmes, the award of a first-cycle degree (Bachelor) requires 3 years, in a further fifth the standard period of study is 3.5 years and it lasts 4 years in the remaining 29% of the Bachelor programmes covered by the study. The award of a second-cycle degree (Master) requires 2 years in the majority of the Master programmes (67%). Only 18% offer the award of a Master degree within only 1 year and 10% have a standard period of 1.5 years. Long university programmes of 4 or more years leading to a Master equivalent degree are a clear minority (see Table II.7). It might be interesting to notice that short Master programmes of duration of less than two years are most common in Spain (85% of the respective programmes), Switzerland (65%), Latvia (55%) and the Netherlands (51%), based on country-specific data.

Table II.7

Standard period of study of the ETPs – by degree awarded at the end of the programme (%)

	Degree awarded		Total
	Bachelor	Master or equivalent	
1 year	n.a.	18	14
1.5 years	n.a.	10	8
2 years	n.a.	67	54
2.5 years	n.a.	1	1
3 years	51	0	10
3.5 years	20	0	4
4 years	29	1	6
5 years	n.a.	2	1
5.5 years and longer	n.a.	1	1
Total	100	100	100
Count (n)	(172)	(724)	(896)

Source: Programme Questionnaire
Question 2.7: Please state the standard period of study for the programme in years.

As Table II.8 shows, for the large majority of ETPs (88%), both at Bachelor and Master level, admission is based on some specific selection criteria. Nevertheless, almost a quarter of ETPs at Bachelor level have open admissions, i.e. all applicants can enrol.

Table II.8

Selection amongst the applicants qualified for entry – by degree awarded at the end of the programme (%)

	Degree awarded		Total
	Bachelor	Master	
No, all can enrol	22	8	10
Enrolment on the first come first served basis	3	2	2
Application of specific selection criteria/measures	76	90	88
Total	100	100	100
Count (n)	(157)	(691)	(848)

Source: Programme Questionnaire
Question 3.2: Do you select amongst the applicants qualified for entry?

For almost all ETPs at Bachelor level, 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. Almost every second-cycle programme requires an undergraduate degree for admission.

Among the given criteria by the 88% of ETPs that use selection criteria, the most important ones are the academic/intellectual/artistic potential of the applicants (92% of the programmes apply these selection criteria), followed by the proficiency in English (88%). Personality, social and cultural competences (44%) or practical experiences (33%) on the other hand, are relevant criteria for only a minority of the Programme Directors. While intellectual skills and the proficiency in English are of similar importance for Bachelor and Master programmes, personality, social and cultural competences are more often a selection criterion for Bachelor programmes, whereas work/practical experience plays a more important role when selecting students for Master programmes (see Table II.9).

Table II.9

Important criteria for selecting students for the programme – by degree awarded at the end of the programme (%*)

	Degree awarded		Total
	Bachelor	Master	
Academic/intellectual/artistic potential	89	93	92
Proficiency in English	90	87	88
Personality/social competences/ cultural competences	57	42	44
Work/other practical experience	14	36	33
Count (n)	(116)	(622)	(738)

Source: Programme Questionnaire
Question 3.3: How important are the following criteria for selecting students for the programme?
* Scale points 5 and 4 on a scale from 1 = 'Not important at all' to 5 = 'very important'

Altogether, as Table II.10 shows, only a few programmes rely solely on educational credentials like grades or certifications for the selection of students (7%). In most cases the students have not only to show their credentials, but have to additionally pass a language test (38%) or pass both an entrance exam and a language test (31%). As Table II.10 further shows, the main mode of selecting students in Master programmes is the examination of educational credentials in combination with a language test (43%), while the selection for Bachelor ETPs more often involves an entrance test in addition to credentials and language tests.

Table II.10

Information/measures taken into account for the selection of students – by degree awarded at the end of the programme (%)

	Degree awarded		Total
	Bachelor	Master	
Only educational credentials, certificates, etc.	4	8	7
Certificates and entrance tests	5	7	6
Certificates and language tests	15	43	38
Credentials, entrance and language tests	36	30	31
Only entrance or language tests	13	3	5
No selection criteria employed	26	10	13
Total	100	100	100
Count (n)	(157)	(691)	(848)

Source: Programme Questionnaire; Question 3.4: What information do you take into account or what kind of measures do you employ for selecting among applicants?

Overall, entrance examinations are more common in Bachelor than in Master programmes (53% as compared to 39%) and mostly happen in the form of interviews (30% of all programmes). Written examinations play a role only in Bachelor programmes (29%), while other forms of oral examinations (i.e. other than interviews) are neither an important measure for the selection of students in Bachelor (10%) nor in Master programmes (5%).

Apart from IELTS where the minimum score to be reached by students in the language test is the same (6 points), at both levels, the requirements in Master programmes are higher than in Bachelor programmes (see Table II.11). On the Master level the minimum score to be reached in the TOEFL iBT is 86 and in the TOEFL paper-based test it is 563.

Table II.11

**Minimum score to be reached by students in language tests –
by degree awarded at the end of the programme (Mean)**

	Degree awarded		Total
	Bachelor	Master	
TOEFL iBT	79	86	85
TOEFL paper based test	538	563	560
IELTS	6	6	6
Count (n)	(66)	(361)	(427)

Source: Programme Questionnaire
Question 3.4: What information do you take into account or what kind of measures do you employ for selecting among applicants?

As Table II.12 shows, the admission requirements differ to a certain extent between country groups. While Master programmes in the Nordic countries and in Central West Europe more often use the combination of certificates and language tests for the selection of students than the respective programmes in Central East Europe, the latter more often use additional entrance tests, partially by giving less importance to the educational credentials and certificates of students. On the Bachelor level the figures are similar but not as pronounced.

Table II.12

Information/measures taken into account for the selection of students – by region (%)

	Region						Total
	Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	
Only educational credentials, certificates, etc.							
Bachelor	6	0	0	6	7	6	4
Master	2	16	5	5	16	13	8
Certificates and entrance tests							
Bachelor	0	7	8	2	13	11	5
Master	1	6	6	10	10	13	7
Certificates and language tests							
Bachelor	19	7	31	12	7	11	15
Master	66	16	48	19	32	6	43
Educational credentials, entrance and language tests							
Bachelor	34	27	35	39	47	28	36
Master	16	26	32	41	33	44	30
Only entrance or language tests							
Bachelor	38	0	4	8	0	22	13
Master	5	10	1	8	1	13	3
No selection criteria employed							
Bachelor	3	60	23	33	27	22	26
Master	11	26	8	16	7	13	10
Total	100	100	100	100	100	100	100
Count (n)	(184)	(46)	(284)	(125)	(178)	(35)	(852)

Source: Programme Questionnaire
Question 3.4: What information do you take into account or what kind of measures do you employ for selecting among applicants?

5   Marketing channels

To attract foreign or domestic students to the ETPs, a broad range of marketing measures and communication channels were used, as shown in Table II.13. Most common are the provision of information via the university website (81%), distribution of printed information material (71%), presentations at student fairs and information events at home (65%) and abroad (58%), use of entries in international portals/databases (64%), programme overviews/databases of national agencies (52%) and social media (56%). On the other hand, advertisements in newspapers (31%) and the use of agents in target countries (18%) play only a minor role.

Table II.13

Kind of marketing activities used – by degree awarded at the end of the programme (%, multiple replies possible)

	Degree awarded		Total
	Bachelor	Master	
Provision of information via the university website	81	80	81
Production and distribution of printed information material/brochures etc.	73	70	71
Information events in your home country/home institution	80	61	65
Entry in international portals/databases (e.g. StudyPortals)	56	66	64
Distribution of information via existing networks/partnerships of the institution	64	61	61
Information events abroad, i.e. student fairs, conferences etc.	70	55	58
Social media (e.g. Facebook)	68	53	56
Entry in programme overviews/databases of national agencies	55	51	52
Advertisements in newspapers/mass media	48	26	31
Employment/use of agents in target countries	31	15	18
No special marketing activities	16	16	16
Other marketing activities	7	6	6
Total	650	561	578
Count (n)	(147)	(639)	(786)

Source: Programme Questionnaire
Question 5.2: Which kind of marketing activities or strategies do you use?

In comparison to the results of the 2007 survey, there is an increase in the use of programme overviews/databases of national agencies, while the frequency of all other marketing activities has slightly decreased since 2007. However, the hierarchy of the individual activities has not changed significantly over the years. Thus, the internet (the university website) was already in 2002 and 2008 the top dissemination instrument for promotional messages.

Bachelor Programme Directors use several marketing instruments more often than those of Master programmes, e.g. student fairs and information events at home and abroad, social media, advertisements in newspapers, and agents in target countries. On the other hand, Master programmes use only one type of instrument more often than Bachelor programmes, namely entries in international portals/databases.

Naturally, the marketing instruments are adjusted to the target groups. To reach foreign students ETPs use mainly student fairs abroad as well as entries in international portals and databases of national agencies, but also agents in the target countries. Domestic students are more often addressed by information events in the country in which the institution is located, social media and advertisements in newspapers (see Table II.14).

Table II.14

**Kind of marketing activities used – by target groups
(%, multiple replies possible)**

	Target groups			Total
	Foreign and domestic students	Only foreign students	Only domestic students	
Provision of information via the university website	97	92	88	80
Production and distribution of printed information material/brochures etc.	87	76	94	71
Information events in your home country/ home institution	88	42	88	65
Entry in international portals/databases (e.g. StudyPortals)	78	76	41	64
Distribution of information via existing networks/partnerships of the institution	76	65	53	61
Information events abroad, i.e. student fairs, conferences etc.	72	63	35	58
Social media (e.g. Facebook)	70	56	65	56
Entry in programme overviews/databases of national agencies	62	61	47	52
Advertisements in newspapers/ mass media	41	22	47	31
Employment/use of agents in target countries	22	21	0	18
Other marketing activities	8	6	6	7
Total	703	579	565	579
Count (n)	(483)	(156)	(17)	(781)

Source: Programme Questionnaire
Question 5.2: Which kind of marketing activities or strategies do you use?

When it comes to regional differences, it is interesting to observe that about one fifth of the covered ETPs from the Nordic countries (21%) and Central West Europe (19%) use no specific marketing activities at all. On the other hand, the Baltic states seem to be, comparatively speaking, very active in participating in information events, both abroad (88%) and at home (80%) and in using the university website and social media for promotion purposes (98% and 90% respectively). In fact, they seem to be, of all country groups, the ones most frequently using the different type of marketing channels listed in Table II.15.

Table II.15

**Kind of marketing activities used – by region
(%, multiple replies possible)**

	Region						Total
	Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	
Provision of information via the university website	74	98	77	85	84	90	81
Production and distribution of printed information material/ brochures etc.	64	88	71	77	70	74	71
Information events in your home country/ home institution	54	80	62	73	66	84	65
Entry in international portals/databases (e.g. StudyPortals)	51	68	70	63	69	58	64
Distribution of information via existing networks/ partnerships of the institution	52	83	58	70	64	68	62
Information events abroad, i.e. student fairs, conferences etc.	51	88	57	69	53	52	58
Social media (e.g. Facebook)	47	90	48	71	56	74	56
Entry in programme overviews/databases of national agencies	43	65	58	57	44	48	52
Advertisements in newspapers/mass media	24	63	23	47	25	61	31
Employment/use of agents in target countries	8	38	13	40	16	13	18
No special marketing activities	21	3	19	12	13	6	16
Other marketing activities	9	5	7	2	7	3	6
Total	498	765	562	666	568	632	578
Count (n)	(168)	(40)	(266)	(121)	(164)	(31)	(790)

Source: Programme Questionnaire
Question 5.2: Which kind of marketing activities or strategies do you use?

6   Programme size and number of applicants

With respect to the number of students enrolled in ETPs, large differences were observed. We found on the one hand programmes with less than five students and on the other programmes with more than 500 students. But most of the programmes (67%) are rather small, with up to 50 students (Table II.16). Medium size programmes with 51-100 students as well as programmes with more than 100 students are rarer, with shares of 17% and 16% of the sample respectively.

Bachelor programmes are considerably larger than Master programmes (see Table II.16). In the academic year 2013/14 about two thirds of the Bachelor programmes (66%) have more than 50 students enrolled, while the respective proportion of Master programmes rises only to about one quarter (26%). The smaller size of Master programmes is not country specific, but the rule throughout all regions.

Table II.16

Number of students enrolled in the ETPs in the academic year 2013/14 – by degree awarded at the end of the programme (%)

	Degree awarded		Total
	Bachelor	Master	
Up to 20 students	18	34	31
21-50 students	17	40	36
51-100 students	24	15	17
101 and more students	42	11	16
Total	100	100	100
Count (n)	(119)	(581)	(700)

Source: Programme Questionnaire
Question 3.5: Please state (estimate) the number of applicants for and students in the programme in the academic year 2013/14 or most recent year for which data are available.

A comparison of the number of applicants with the number of first year students shows, on average, a demand (number of applicants) six times higher than the offer (places available). The demand and availability of study places in Bachelor programmes taught in English is often more balanced than in Master programmes (31% compared to 14%). In contrast, the number of applicants for Master programmes is often three or more times higher than the number of first year students admitted (see Table II.17).

Table II.17

Relation of applicants and first year students of ETPs in the academic year 2013/14 – by degree awarded at the end of the programme (%)

	Degree awarded		Total
	Bachelor	Master	
Balanced	31	14	17
2 times higher	12	24	21
3-5 times higher	24	28	27
6-10 times higher	12	19	18
11 and more times higher	21	16	17
Total	100	100	100
Count (n)	(100)	(407)	(507)

Source: Programme Questionnaire
Question 3.5: Please state (estimate) the number of applicants for and students in the programme in the academic year 2013/14 or most recent year for which data are available.

An analysis by regions shows a highly balanced situation, comparably speaking, between the number of applicants and the number of study places available at both Bachelor and Master level in two regions – South East Europe and the Baltic states (see Table II.18). ETPs in the Nordic countries and in Central West Europe on the other hand have registered in the academic year 2013/14 a much higher number of applicants than available places.

Table II.18

Relation of applicants and first year students of ETPs in the academic year 2013/14 – by region (%)

	Region						Total
	Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	
Balanced							
Bachelor	3	50	24	33	80	86	31
Master	6	36	5	33	19	50	14
2 times higher							
Bachelor	7	17	6	23	0	0	12
Master	15	18	19	31	36	20	24

	Region						Total
	Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	
3-5 times higher							
Bachelor	14	25	41	33	0	0	24
Master	28	36	33	29	18	30	28
6-10 times higher							
Bachelor	24	8	12	3	20	0	12
Master	31	9	24	2	13	0	19
11 and more times higher							
Bachelor	52	0	18	7	0	14	21
Master	20	0	19	6	15	0	16
Total	100	100	100	100	100	100	100
Count (n)	(110)	(23)	(177)	(80)	(101)	(17)	(508)

Source: Programme Questionnaire
Question 3.5: Please state (estimate) the number of applicants for and students in the programme in the academic year 2013/14 or most recent year for which data are available.

Based on these findings, it is not surprising that Programme Directors from South East Europe and the Baltics more often reported significant difficulties related to insufficient enrolment of foreign students than Programme Directors in the Nordic region and in Central West Europe (see Table II.19). With respect to the enrolment of domestic students, the picture is not so clear. Programme Directors from Central East Europe and from South East Europe most often mentioned difficulties to find a sufficient number of domestic students for their ETPs, possibly because in countries where the same programme is offered also in the domestic language, the differences in fee levels between the English and the domestic language programme are considerable.

Last minute withdrawals of foreign and/or domestic students are a problem for a quarter of ETPs. This difficulty affects most often ETPs in the Baltic states (40%). In all other regions the extent of this problem is more or less at the same level, i.e. it seems not to be country specific.

Table II.19

**Significant difficulties which affected the running of the ETPs –
by region (%*)**

	Region						Total
	Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	
Lack of/insufficient enrolment of foreign students	19	46	11	41	21	41	22
Lack of/insufficient enrolment of domestic students	23	22	16	41	22	32	23
Last minute withdrawals of international and/or domestic students	28	40	21	29	25	20	25
Count (n)	(171)	(37)	(258)	(118)	(157)	(31)	(772)

Source: Programme Questionnaire
Question 4.7: To which extent have the following difficulties affected the running of the programme?
* Scale points 5 and 4 on a scale from 1 = 'not at all' to 5 = 'to a great extent'

7 Classroom composition – regional origin of students

In order to determine the geographical origin of students enrolled in ETPs, the Programme Directors were asked to provide information on the total number of students in the academic year 2013/14 in one of two ways. Preferably, they were asked to 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 foreign students. Unfortunately, only slightly more than half of all respondents were able or willing to provide data on the country/region of students' origin. 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 of the geographical distribution of students in ETPs.

In total, about 54% of all students enrolled in ETPs are foreign students (Table II.20). In the 2007 survey, their proportion was considerably higher, at 65%, and in 2001 slightly higher, at 60%. Given these variations, there is obviously no clear trend in the enrolment of foreign students in the period 2001-2014.

With respect to the proportion of foreign students, a large variety between the ETPs covered in the survey could be observed. In a small proportion of 5% only domestic students are enrolled and in a further fifth of ETPs the share of foreign students is at most 25%. On the other hand, 10% of ETPs stated that all students are from outside their own country and in a quarter of programmes the proportion is 76% or higher. As Table II.20 shows, low enrolment of foreign students is most common in the Baltics and in South East Europe while it is highest in the Nordics and Central West Europe.

Table II.20

Proportion of foreign students enrolled in ETPs in 2013/14 – by region (% and mean)

	Region						Total
	Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	
None	2	26	0	15	3	16	5
1-25%	7	39	18	17	27	56	20
26-50%	28	13	28	17	28	16	26
51-75%	26	6	16	11	12	4	16
76-99%	30	16	32	8	21	0	24
100%	8	0	6	32	9	8	10
Total	100	100	100	100	100	100	100
Count (n)	(149)	(31)	(215)	(84)	(149)	(25)	(653)
All ETPs (mean)	62	27	59	55	51	22	54
Bachelor (mean)	60	10	36	45	29	30	39
Master (mean)	63	36	60	61	52	18	57

Source: Programme Questionnaire
Question 3.5: Please state (estimate) the number of applicants for and students in the programme in the academic year 2013/14 or most recent year for which data are available.

The proportion of foreign students in Master programmes is on average substantially higher than in Bachelor programmes (57% as compared to 39%). This finding supports the assumption that Bachelor programmes more often serve as a means to make domestic students fit for the global market while Master programmes more often suit to attract foreign students as top talents for the own labour markets, as fee payers, etc.

Students with a European nationality form the largest cohort in ETPs, in fact the majority (about 68% - i.e. 17% EU//EFTA, 6% other European and 45% domestic). In Europe, of all foreign students in ETPs,

– 17% come from European Union and EFTA countries,

– 6% come from other European countries,

– 14% come from Asia, (or, to be precise, 4% from China, 4% from India, and 6% from other Asian countries),

– 5% come from Africa,

– 5% come from the Near and Middle East,

– 3% come from North America, and

– 4% come from Latin America[15].

Thus, the group of foreign students from Europe forms the largest continental group (23%), followed closely by Asians (14%). Africa and the Near and Middle East come third while the Americas play only a minor role. Leaving aside Europeans, the majority of foreign students come from developing or emerging economies, where demand for (quality) higher education is rising, but higher education supply is still insufficient.

The enrolment of domestic and foreign students in ETPs differs substantially by country of institutions. As Chart II.2 shows, domestic students have a share of more than three quarters in Lithuania (97%), Romania (90%) and Turkey (84%). On the other hand, the proportion of foreign students from non-EU/EFTA countries is highest in Poland (54%), Belgium (54%), Finland (54%) and Germany (51%).

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[15] Australia and Pacific have less than 1%.

Chart II.2

Home country/region of students enrolled in the ETPs in the academic year 2013/14 – by country (%)
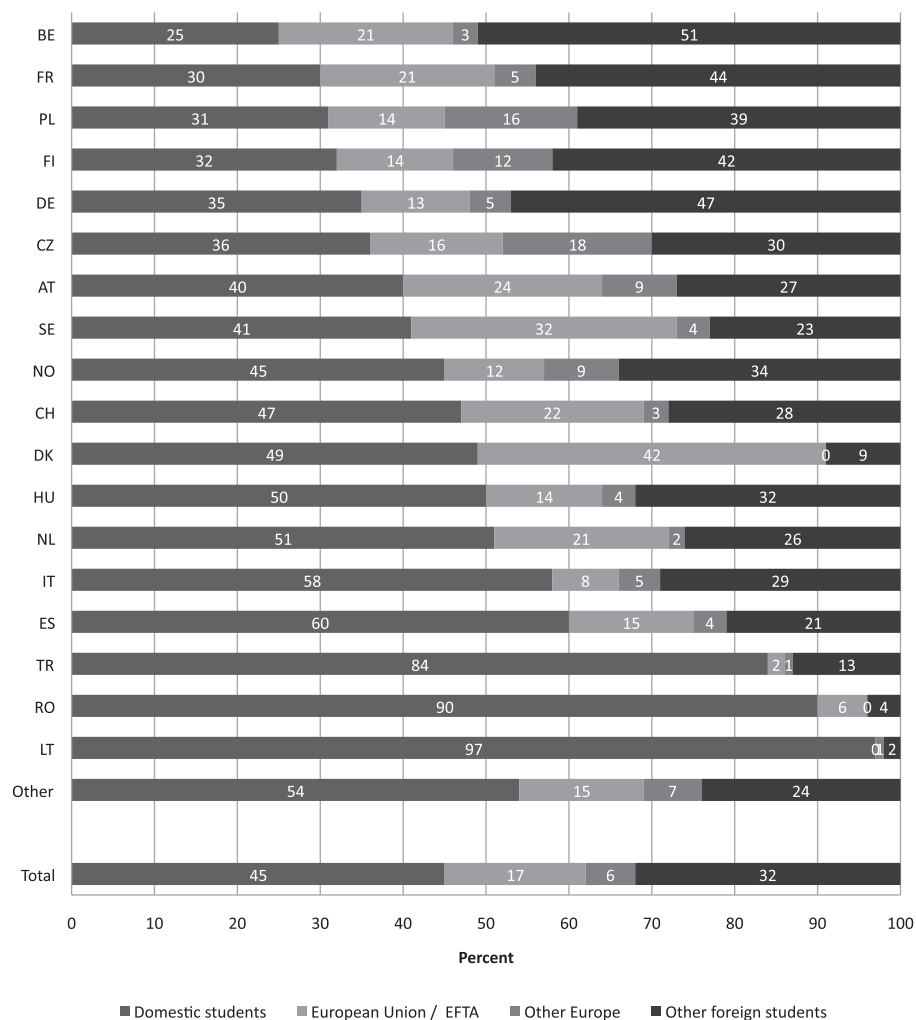
Source: Programme Questionnaire

Question 3.5: Please state (estimate) the number of applicants for and students in the programme in the academic year 2013/14 or most recent year for which data are available.

Question 3.6: If data are available, please state (estimate) the number of students in the academic year 2013/14 or most recent year for which data are available for each region listed below. If numbers are not available, please estimate percentages.

8 Characteristics of the curriculum

Experience indicates that pioneers in one particular field of reform and internationalisation, such as the creation of ETPs, 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 have further features typical of modern and internationalised programmes. From the descriptions of the curriculum by Programme Directors the following characteristics could be elaborated:

Contents especially designed for foreign students.

Contents suitable for the preparation of students for international professions, e.g. interdisciplinary area and regional studies, broadening of traditional programmes through an internationally comparative approach, offering international subject matters like international relations, European law etc., or addressing cross-cultural communication issues and the provision of training in intercultural skills:

– Award of joint or double degrees.

– Mobility windows within the curriculum, e.g. mandatory study periods or work placements abroad. Spending a period abroad is usually a requirement for the award of a joint or double degree.

– Mandatory work placements in the country where the institution is located.

– Special courses to bring students' abilities to a homogeneous level.

It turns out that the vast majority of ETPs have tailored contents to prepare students for international professions (80%) (Table II.21). This is often done by broadening traditional programmes by an internationally comparative approach (46%), by focusing on international subject matters (39%) or by addressing cross-cultural communication issues and providing training in intercultural skills (35%).

Table II.21

Characteristics of the curriculum of the ETPs – by degree awarded at the end of the programme (%, multiple replies possible)

	Degree awarded		Total
	Bachelor	Master	
Contents suitable for the preparation of students for international professions	**87**	**78**	**80**
Traditional/original subject area broadened by an internationally Comparative approach	61	43	46
International subject matter Addressing of cross-cultural communication issues and provision of	46	38	39
Training in intercultural skills Interdisciplinary programme such as	53	30	35
area and regional studies	23	25	24
Contents especially designed for foreign students	**30**	**47**	**44**
Award of joint or double degrees	**25**	**28**	**28**
Mobility windows within the curriculum	**20**	**19**	**19**
Mandatory study abroad	14	15	15
Mandatory work placement abroad	12	6	7
Special courses to bring abilities of students to a homogenous level	**20**	**27**	**26**
Mandatory work placements in the country where the institution is located	**26**	**10**	**13**
Other characteristics of the curriculum	**31**	**32**	**32**
Total	238	242	241
Count (n)	(167)	(696)	(863)

Source: Programme Questionnaire
Question 2.9: Which of the following aspects are characteristics of the programme's curriculum?

Slightly more than two fifths of the ETPs are especially designed for foreign students (44%), while 28% award joint or double degrees and 19% have introduced mobility windows in the curriculum in the form of mandatory study or work placements abroad. Mandatory work placements in the country in which the institution is located is a characteristic of 13% of the ETPs and 26% offer special courses to bring abilities of students to a homogeneous level.

What might come as a surprise – at first glance – is the relatively low percentage of programmes with an integrated mobility window in the curriculum (Table II.21). But most of the ETPs are offered at the Master level and are 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, since 55% of all students are non-domestic students and have thus already moved abroad (see Sub-section 7 of Part II).

Characteristics of the ETPs curriculum differ to a certain extent by subject area (see Table II.22). Programmes in social sciences, business and law on Bachelor and on Master level put special emphasis on the preparation of students for international professions (99% and 95%). Contents especially designed for foreign students are most common in natural sciences (51%). The award of joint and double degree is most often a characteristic of ETPs in engineering, manufacturing and construction (32% each of Bachelor and Master programmes) and in social sciences, business and law (35% and 33%). On the Bachelor level it turned out that mobility windows within the curriculum are most frequent in in social sciences, business and law (33%). An interesting case is that ETPs in health and welfare where on the one hand a comparable high proportion of Bachelor programmes are especially de-signed for foreign students while the respective proportion of Master pro-grammes is clearly below the average of all Master programmes.

Table II.22

Characteristics of the curriculum of the ETPs – by main subject area (%, multiple replies possible)

	Main subject area		
	Engineering, manufacturing and construction	Health and welfare	Humanities and arts
Contents especially designed for foreign students			
Bachelor	13	45	25
Master	53	32	54
Contents suitable for the preparation of students for international professions			
Bachelor	68	91	81
Master	67	79	88
Award of joint or double degrees			
Bachelor	32	0	6
Master	32	9	10
Mobility windows within the curriculum			
Bachelor	6	18	13
Master	10	12	16
Mandatory work placements in the country where the institution is located			
Bachelor	19	36	25
Master	9	9	10
Special courses to bring abilities of students to a homogenous level			
Bachelor	16	27	13
Master	25	32	20
Other characteristics of the curriculum			
Bachelor	16	27	38
Master	28	32	30
Total	212	216	221
Count (n)	(147)	(45)	(66)

See previous page

	Main Subject area			Total
	Sciences	Social sciences, business and law	Other	
Contents especially designed for foreign students				
Bachelor	35	38	21	30
Master	53	42	44	47
Contents suitable for the preparation of students for international professions				
Bachelor	71	99	95	87
Master	55	95	87	78
Award of joint or double degrees				
Bachelor	12	35	11	24
Master	26	33	35	28
Mobility windows within the curriculum				
Bachelor	12	33	5	20
Master	17	22	28	19
Mandatory work placements in the country where the institution is located				
Bachelor	35	28	16	26
Master	9	12	13	10
Special courses to bring abilities of students to a homogenous level				
Bachelor	29	21	21	20
Master	30	26	29	27
Other characteristics of the curriculum				
Bachelor	29	35	42	31
Master	38	27	38	32
Total	228	265	264	242
Count (n)	(191)	(319)	(98)	(866)

Source: Programme Questionnaire
Question 2.9: Which of the following aspects are characteristics of the programme's curriculum?

As Table II.23 shows, the importance attached to individual characteristics differs from one country group to another. However, it could not clearly be decided to what extent these are peculiarities of country groups or effects of different compositions of programmes by level of degree and subject area. If we look at those aspects of the curriculum which are of special importance from a national point of view for the recruitment of foreign students, the preparation of domestic students for international professions and the fostering of international cooperation's of higher education institutions, the following strength and weaknesses could be observed:

– Programmes with a content especially designed for foreign students are most common in South West Europe (55% of the Master programmes and 38% of the Bachelor programmes). In Central West Europe the respective proportion of Master programmes is above average (51%) and in Central East Europe the proportion of Bachelor programmes (40%).

– Preparation of students for international professions is a frequent characteristic of curricula of Bachelor programmes in most regions. The respective proportions are lowest in South East Europe (67%) and in the Baltics (69%).

– Most joint or double degree ETPs taking part in the study could be found in South West Europe (56% of the Bachelor and 50% of the Master programmes) and in the Baltics (44% and 32%).

– Mobility windows within the curriculum are most common in ETPs in Central West Europe (46% and 22%) and in South West Europe (38% and 28%).

Table II.23

Characteristics of the curriculum of the ETPs – by region (%, multiple replies possible)

	Region			
	Nordic	Baltic	Central West Europe	Central East Europe
Contents especially designed for foreign students				
Bachelor	33	19	23	40
Master	40	42	51	34
Contents suitable for the preparation of students for international professions				
Bachelor	97	69	96	85
Master	81	84	81	88
Award of joint or double degrees				
Bachelor	19	44	31	6
Master	10	32	27	24
Mobility windows within the curriculum				
Bachelor	22	6	46	8
Master	9	13	22	14
Mandatory work placements in the country where the institution is located				
Bachelor	36	19	15	31
Master	7	16	9	13
Special courses to bring abilities of students to a homogenous level				
Bachelor	31	6	27	15
Master	26	19	36	14
Other characteristics of the curriculum				
Bachelor	39	19	46	27
Master	34	23	37	17
Total	221	213	265	209
Count (n)	(188)	(47)	(281)	(129)

	Region		Total
	South West Europe	South East Europe	
Contents especially designed for foreign students			
Bachelor	38	10	30
Master	55	38	47
Contents suitable for the preparation of students for international professions			
Bachelor	100	67	87
Master	66	81	78
Award of joint or double degrees			
Bachelor	56	33	25
Master	50	13	28
Mobility windows within the curriculum			
Bachelor	38	10	20
Master	28	0	19
Mandatory work placements in the country where the institution is located			
Bachelor	19	19	26
Master	14	0	10
Special courses to bring abilities of students to a homogenous level			
Bachelor	6	29	20
Master	23	13	27
Other characteristics of the curriculum			
Bachelor	13	33	31
Master	31	25	32
Total	269	187	242
Count (n)	(184)	(38)	(867)

Source: Programme Questionnaire
Question 2.9: Which of the following aspects are characteristics of the programme's curriculum?

9 Challenges

Programme Directors of ETPs, both at Bachelor and Master levels, encounter different types of difficulties in the day to day running of their programmes. The biggest problems reported by both groups of coordinators are the large differences in the academic level/ability of students – 30% of respondents in each category mentioned this as a significant difficulty (Table II.24). This seems to be by far the biggest difficulty encountered in the Nordic countries. Although the survey had not asked about such difficulties in programmes taught in the domestic language, we assume that this is not a challenge specific to ETPs, but a general one; however in the case of ETPs this might be felt as more acute, as it is often coupled with heterogeneity in the command of the English language, which is felt more, according to our survey, by Institutional Coordinators of ETPs at Bachelor than at Master level (21% compared to 13%).

While some of the coordinators providing more extended comments to this question regarded the heterogeneity of the student body in ETPs also as an important asset, they reported that some aspects deriving from this diversity are difficult to manage at programme level. Such challenging aspects include the different expectations of students with regards to teaching styles in the classroom given their diverse backgrounds – expectation for more passive versus more interactive approaches –, different levels of subject area knowledge, and different student academic practices and ethical standards (e.g. different habits in referencing academic work).

Table II.24

**Significant difficulties which affected the running of the ETPs –
by region (%*, multiple replies possible)**

	Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	Total
				Region			**Total**
Lack of/insufficient enrolment of foreign students							
Bachelor	9	62	9	41	8	15	25
Master	22	38	11	41	22	60	21
Lack of/insufficient enrolment of domestic students							
Bachelor	9	31	0	46	0	27	23
Master	27	17	18	38	23	31	23
Lack of support from faculty/ academic staff							
Bachelor	9	15	9	13	0	18	11
Master	7	13	7	6	7	15	7
Insufficient proficiency in English of foreign students							
Bachelor	16	8	9	7	0	0	8
Master	13	4	8	9	4	14	8
Insufficient proficiency in English of domestic students							
Bachelor	0	0	4	7	8	0	4
Master	1	0	3	5	4	0	3
Insufficient proficiency in English of academic staff							
Bachelor	0	0	4	7	0	0	3
Master	4	17	3	3	6	0	4
Insufficient proficiency in English of administrative staff							
Bachelor	0	0	17	12	0	9	8
Master	1	8	5	9	14	0	7
Insufficient proficiency of foreign students in the domestic language at your institution							
Bachelor	19	17	22	14	8	0	15
Master	2	17	7	1	6	8	6

	Region						Total
	Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	
Heterogeneity in the command of English of students in the classroom							
Bachelor	19	17	13	36	8	8	21
Master	17	22	10	21	9	21	13
Large differences in the academic level/ability of students							
Bachelor	34	58	17	39	0	8	30
Master	38	26	31	25	24	15	30
Last minute withdrawals of foreign and/or domestic students							
Bachelor	28	58	0	35	0	9	24
Master	28	30	23	25	26	31	26
Count (n)							
Bachelor	(32)	(13)	(23)	(47)	(12)	(15)	(142)
Master	(138)	(24)	(235)	(71)	(144)	(15)	(627)

Source: Programme Questionnaire
Question 4.7: To which extent have the following difficulties affected the running of the programme?
* Scale points 5 and 4 on a scale from 1 = 'not at all' to 5 = 'to a great extent'

Significant shares of ETPs at Bachelor and Master programmes further suffer (more or less to the same extent) because of last minute withdrawals of foreign and/or domestic students (24% and 26%), as well as from a lack of/insufficient enrolment of foreign students (25% and 21%) and of domestic students (23% each). These difficulties seem to affect particularly programmes in the Baltic states, in Central East and in South East Europe, where relatively big shares of respondents identified last minute withdrawals and lack of/insufficient enrolment of both international and domestic students as serious challenges.

Last-minute withdrawals are often due, some of the coordinators report, to delays in processing the applications of students because not all administrative staff are supportive of ETPs or understand the need of a speedy response, but also to the lack of funding from the part of students that do not manage to get scholarships, for example. Some of the coordinators also felt they were losing some of the accepted applicants because of the more

"aggressive" countries that offer students attractive grants and scholarships. On the other hand, the low enrolment of domestic students seems to be in certain countries caused by national regulations that restrict the access of domestic students to such programmes, which are primarily targeting foreign students.

Other difficulties were mentioned by Programme Directors in addition to those covered in Table II.24 and they are quite diverse, as follows:

– lack of institutional support, particularly from administrative staff, which leads to academic staff having to become involved in programme administration as well. Related to this, some institutions and programmes suffer from a high turnover of administrative staff, which leads to a lack of continuity and loss of expertise when dealing with administrative matters in ETPs.

– restrictive national regulations particularly when it comes to issuing visas for foreign students, which can cause in countries like France, the Netherlands, Finland, Portugal or Sweden, some Programme Directors said, very long delays, of up to one year (depending on where the foreign students come from).

– lack of (structural) funding for the programmes, as well as for the foreign students taking part in the programme. Very often the sustainability of the programmes depends on the tuition fees that students pay, but on the other hand many programmes feel the pressure to lower their fee levels to be more competitive and be able to attract foreign students. Many programmes do not have any funding available to compensate for the fees by granting scholarships to at least some of their ETP students, and feel they are disadvantaged because of this compared to other programmes that do. Lack of funding makes it difficult, some coordinators said, to keep the quality of the ETPs at a very good level.

– competition – many of the Programme Directors felt they are in a fierce competition with established, top-ranked programmes in countries where English is the mother tongue and they found this difficult.

– challenges to select the "right students" – Some of the Programme Directors complained that especially for new ETPs they are forced to lower the standards to be able to attract foreign students and to launch the programmes, and thus they don't always get as good students as they would like. Other Programme Directors, especially from the Nordic countries, complained that they are flooded with very good applications and it is at times very difficult to select in a fair manner.

Part III – English in the classroom and beyond

Queenie K.H. Lam (ACA), Friedhelm Maiworm (GES)

When ETPs in non-English-speaking European countries first became a matter of academic attention around the turn of the century, a highly controversial debate set in. It concentrated on the quality of learning, which critics maintained was in danger. Concerns were raised that the classroom reality of ETPs was marked by teachers who could not properly express themselves in English and students who were unable to fully understand. At its height, the dispute displayed all signs of religious warfare. The discussion on English as a "medium of instruction" appears to have calmed down considerably, but the issue of language mastery is still on the agenda.

The 2001 and 2007 surveys 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 foreign students' mastery (or rather the lack of mastery) of the domestic language of their host country.

How has the situation developed in the past seven years? The 2014 survey tried to shed light on this matter with a close look into language-related issues, which are presented in this part of the study.

1   Language proficiency

1.1   Language proficiency of students

The vast majority of Programme Directors rated the proficiency in English of students enrolled in their ETPs as good or very good. The competences of domestic students were however more positively assessed than those of foreign students, 80% compared to 73% (Table III.1). There are some exceptions on the country level, however. In Spain, France, Italy and Turkey, the proficiency of foreign students was rated higher than that of the domestic students. In Italy and Turkey, this could be explained by the relatively low English proficiency of the domestic students, whereas in France and Spain, it was clearly because of the higher English proficiency of the foreign students. 98% and 84% of the Programme Directors in France and Spain, compared to the average 73% among all directors, considered the English of their foreign students to be of very high standard (Table III.3).

Also shown in Table III.1 below, the English skills of Master students were perceived more positively than that of Bachelor students. Directors of Master programmes assessed the English proficiency of both foreign students (75% compared to 64% at Bachelor level) and domestic students (81% compared to 78%) more positively than the directors of Bachelor programmes.

Table III.1

Positive rating (good or very good) of the proficiency in English of students enrolled in the ETPs – by degree awarded at the end of the programme (%*)

	Degree awarded		Total
	Bachelor	Master	
Foreign students (who are not native speakers of English)	64	75	73
Domestic students	78	81	80
Count (n)	(148)	(644)	(792)

Source: Programme Questionnaire
Question 4.2: How would you rate the proficiency in English of students and staff members enrolled or involved in your English-Taught Programme?
* Scale points 5 and 4 on a scale from 1 = 'very poor' to 5 = 'very good'

The English proficiency of students also differs by subject area. While the vast majority of directors in charge of programmes in social sciences, business and law reported good or very good English skills for both foreign and domestic students, the respective proportions are considerably lower (for both categories of students) for programmes in engineering, manufacturing and construction as well as in sciences (see Table III.2).

Table III.2

Positive rating of the proficiency in English of students enrolled in the ETPs – by main subject area (%*)

	Main Subject area						Total
	Engineering, manufacturing and construction	Health and welfare	Humanities and arts	Sciences	Social sciences, business and law	Other	
Foreign students (who are not native speakers of English)	65	70	72	64	80	80	73
Domestic students	66	86	76	77	88	85	80
Count (n)	(140)	(43)	(61)	(179)	(283)	(89)	(795)

Source: Programme Questionnaire
Question 4.2: How would you rate the proficiency in English of students and staff members enrolled or involved in your English-Taught Programme?
* Scale points 5 and 4 on a scale from 1 = 'very poor' to 5 = 'very good'

On country level, as shown in Table III.3, foreign students studying in Belgium, Hungary, Sweden, and to a lesser extent, Turkey, Poland and Norway, were seen as less proficient in English than those studying in other countries. On average, 73% of the Programme Directors rated their foreign students as good or very good in English, whereas in the above-mentioned countries, only 50%-65% of the Programme Directors held the same view.

Table III.3

Positive rating of the proficiency in English of students, academic and administrative staff members involved in ETPs – by country (%*)

	Country								
	AT	BE	CH	CZ	DE	DK	ES	FI	FR
Foreign students (who are not native speakers of English)	88	51	73	73	73	68	84	74	98
Domestic students	96	78	80	76	84	89	61	95	85
Teaching staff	100	100	93	95	91	95	88	95	92
Administrative staff	88	82	73	84	57	63	28	77	58
Count (n)	(26)	(39)	(15)	(43)	(129)	(19)	(32)	(66)	(53)

	Country										Total
	HU	IT	LT	NL	NO	PL	RO	SE	TR	Other	
Foreign students (who are not native speakers of English)	57	79	71	79	63	63	73	54	60	72	73
Domestic students	71	53	93	86	100	82	83	87	50	72	80
Teaching staff	97	94	93	98	100	97	100	96	100	94	95
Administrative staff	68	66	73	66	75	50	50	66	42	62	65
Count (n)	(31)	(53)	(15)	(58)	(8)	(30)	(12)	(70)	(12)	(85)	(796)

Source: Programme Questionnaire
Question 4.2: How would you rate the proficiency in English of students and staff members enrolled or involved in your English-Taught Programme?
* Scale points 5 and 4 on a scale from 1 = 'very poor' to 5 = 'very good'

To explain the above observations, one must take into account both expectations from the ETP Programme Directors and the actual language proficiency of the students, among others. For example, in the Nordic countries, where ETPs have long been established and admissions tend to be more selective, the Programme Directors' expectation for good English may be higher, and thus more difficult for the students to reach, than that in other regions. Whereas in Central East Europe or Turkey, where ETPs tend to be new, income-driven and less selective in admissions, the less than satisfactory English skills of the foreign students may actually reflect the insufficiency of English skills.

1.2 Language proficiency of academic staff

Almost all Programme Directors rated the English proficiency of academic staff teaching in ETPs as good or very good (95%) (Table III.3). Among those who responded to the survey, those from Spain were the most critical of the English proficiency of their teaching staff (88%). Some country differences were observed, but the ratings are overwhelmingly positive. All programme Directors (100%) from Austria, Belgium, Norway, Romania and Turkey rated the English proficiency of their teachers as very good or good. Nearly all from the Netherlands, Sweden, Hungary and Poland indicated the same high ratings.

The positive picture presented here seems unrealistically positive across Europe when contrasted with some of the negative remarks over the English skills of ETP teachers often heard from students or critics of ETPs. The contradiction may again be explained by the differences in the expectation of the students and the programme providers with regard to the actual English skills of the teachers. It may, however, also be the results of proactive selection and

training measures employed by institutions to ensure the high English proficiency of their teaching staff (see Sub-section 3.2 below).

1.3   Language proficiency of administrative staff

Also shown in Table III.3, about two thirds of the Programme Directors rated the proficiency in English of administrative staff members involved in the ETPs as good or very good. The respective proportion is highest in Austria (88%), Czech Republic (84%) and Belgium (82%), while it is lowest in Turkey (42%) and Spain (28%). A mixed picture was perceived in Germany, France, Poland and Romania, where only about half of the Programme Directors viewed the English proficiency of their administrative staff positively.

From a broader perspective, some noticeable regional differences by level of programme were observed. In South West Europe, administrative staff members supporting Master-level ETPs in this region were seen as the least proficient in English. Only 52% of the Programme Directors rated their English proficiency positively. This is a stark contrast from that of the administrative staff supporting Bachelor-level ETPs who received a high rating from over 90% of the Programme Directors surveyed. A slightly similar pattern was observed in the Nordic and Baltic countries where administrative staff supporting Bachelor-level ETPs was seen to be more proficient in English than those supporting Master-level ETPs.

On the contrary, in Central West Europe, Central East Europe and South East Europe, English proficiency of all those involved in Master-level ETPs was rated higher than those involved in Bachelor-level ETPs across the board. The biggest concern over English proficiency in these regions appears to be with the administrative staff supporting Bachelor-level ETPs. Less than 60% of the Programme Directors rated the English proficiency of administrative staff for Bachelor-level ETPs as good or very good.

Among all regions, administrative staff in South East Europe is the least prepared in English. This may be explained by the fact of ETPs primarily enrolled domestic students in countries like Turkey (84%) and Romania (90%). In such cases, the introduction of ETPs does not necessarily lead to the introduction of English into the administrative environment (see Chart II.2).

Table III.4

Positive rating of the proficiency in English of students, academic and administrative staff members involved in ETPs – by region (%*)

	Region						Total
	Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	
Foreign students (who are not native speakers of English)							
Bachelor	63	62	68	55	93	60	64
Master	65	72	73	71	87	86	75
Domestic students							
Bachelor	94	86	79	70	71	63	78
Master	91	80	85	75	68	81	81
Teaching staff							
Bachelor	100	93	92	94	100	100	96
Master	95	88	95	96	93	100	95
Administrative staff							
Bachelor	75	71	58	58	93	44	65
Master	70	69	67	68	52	75	64
Count (n)							
Bachelor	(32)	(14)	(24)	(48)	(14)	(16)	(148)
Master	(138)	(26)	(243)	(72)	(151)	(16)	(644)

Source: Programme Questionnaire
Question 4.2: How would you rate the proficiency in English of students and staff members enrolled or involved in your English-Taught Programme?
* Scale points 5 and 4 on a scale from 1 = 'very poor' to 5 = 'very good'

2 Language problems in ETPs

2.1 Language problems of students

By and large, insufficient English proficiency of both domestic students and foreign students appears to be the smallest language-related problem, while "heterogeneity" in the command of English used by the students in the class-room is more of a problem according to the respondents of both the Institutional Survey and Programme Survey (Chart III.1).

It is interesting to note though that there are big differences across the board between the answers of Institutional Coordinators and of Programme Direc-

tors, with Institutional Coordinators rating more frequently all the four language-related issues as "a serious/a very serious problem" than Programme Directors. The biggest discrepancy is related to the insufficient proficiency of foreign students in the host language – while 34% of Institutional Coordinators viewed this as a serious (and as the biggest) problem, only 7% of Programme Directors held this view. Instead, the most often encountered problem for Programme Directors seems to be the heterogeneity in the command of English of students (15%), while for Institutional Coordinators this is only the second most frequent problem (25%). These differences are not that surprising, though. In most cases, the Programme Directors are likely to have more contact with the students in the classroom setting where English is used, while the Institutional Coordinators are more likely to assist the students with the administrative matters that require the use of the host language.

Chart III.1

Significant problems encountered with language proficiency – by type of respondents (%*)
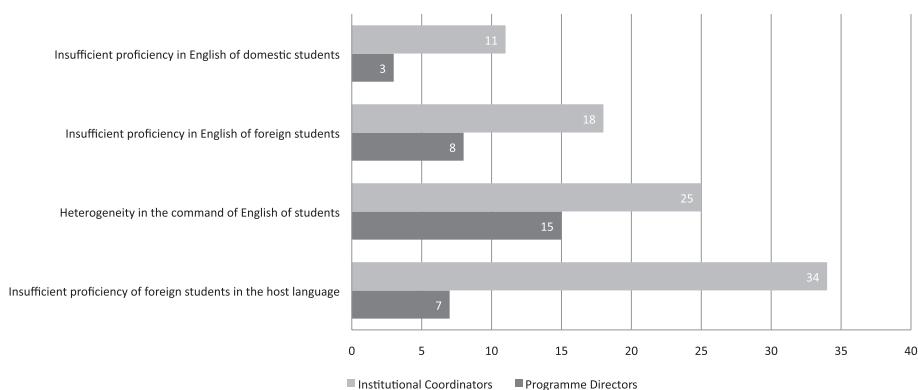
Source: Institutional Questionnaire
Extract from Question 3.7: To what extent did your institution encounter difficulties in any of the following areas in running of the English-Taught Programme(s)?
Source: Programme Questionnaire
Extract from Question 4.7: To which extent have the following difficulties affected the running of the programme?
* Points 4 and 5 on a scale from 1 = 'not at all' to 5 = 'very serious difficulties'

While we are interested in trends, a comparison of the present data with the data from 2001 and 2007 surveys is only partly legitimate. This is because the countries surveyed and the definitions of ETPs in the three studies are not identical, as explained earlier in Part I of the study. In particular, the 2001 sur-

vey included mixed-language programmes, in which a good command of the domestic language was also necessary in the classroom. Despite all these limitations, it could still be mentioned that the percentage of Programme Directors who identified significant problems with regard to all four questions had gone down in 2007 and decreased further in 2014. Programme Directors who viewed the foreign students' proficiency in the host-country language as insufficient went down from 39% in 2001 to 7% in the current study. The percentage value for the lack of English proficiency of foreign students went down from 21% to 8%. And the frequency of the least-often perceived problem in both surveys, an insufficient mastery of English of domestic students, decreased from 8% to 3% in the view of Programme Directors.

In interpreting the above findings – on all four problem categories – one must bear in mind that 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. By and large, however, the findings of the present surveys suggest that the conclusions of the 2001 and 2007 surveys still apply, and that English language proficiency has become less of a problem over the past seven years.

It is not to be ruled out, though, that institutions have, over time, gotten used to the imperfection of communication in an international classroom, of which they might have originally had too high an expectation. The newly found problem in the view of the Programme Directors these days is rather the "heterogeneity" in the command of English of the students and the difficulties to manage such heterogeneity in the classroom.

Beyond the classroom, the lack of domestic language skills for students to access the domestic labour market for internships, summer or post-study employment was raised by a number of Programme Directors in their replies to the open questions of the survey. This points to a new type of employment-related language problems of ETP students (or graduates), but it does not seem to have developed into a common concern for ETP providers yet.

2.2 Language problems of academic staff

As shown in Sub-section 1.2 above, most Programme Directors have a very positive view of the English proficiency of their academic staff involved in the delivery of ETPs. According to the additional comments given by the respondents to the open questions of the surveys, the use of English proficiency as a selection criterion at the stage of recruitment was said to have improved and guaranteed the English proficiency of the teaching staff in some cases. To see it from a broader perspective, some Programme Directors ex-

plained that with English being the global lingua academia, the offering of ETPs is a means, if not the only means, for them to access global talent and widen the potential choices of their new recruits. These new recruits inevitably speak English but not necessarily the local language (especially small languages) and therefore the courses offered by them "naturally" have to be taught in English. It was noted, however, that the strong English proficiency of the teaching staff does not imply that they can readily handle the heterogeneous command of English, academic and cultural differences of the students in the classroom. As a result, the need to train the teachers, including native English-speakers, to handle linguistic and cultural diversity was mentioned by quite a few of the respondents.

2.3 Language problems of administrative staff

In contrast to the very positive ratings given to the academic staff, the English proficiency of administrative staff, especially those in central administration (such as the registry, financial office, housing office, student service centre, etc.), was regarded as the least satisfactory by the survey respondents. Some Programme Directors pointed out, in their replies to the open questions, that the administrators in the service units are not only unprepared to deal with students in English, but also unwilling to do so. It was therefore seen as a matter of attitude and openness to the foreign students on campus in addition to the lack of language ability.

In some universities where there is no critical mass of ETPs, the Programme Directors admitted that the problem is likely to persist because it is difficult for them to justify the "Englishisation" of the university's administrative system and train all related staff in English to meet the needs of a few foreign students. Moreover, the lack of sustainable funding for ETPs, which are often self-financed or dependent on project funds, was said to have discouraged universities from making long-term investments to solve the language problems of the administrative staff.

Instead of advocating for more language training for administrative staff, some respondents, particularly those from countries with other widely-spoken languages, started to question whether the problem of the administrators' lack of English proficiency is not a problem of the students' lack of domestic language skills. The current practice to completely waive the domestic language requirement in the recruitment of foreign students, even if the study programmes are fully taught in English, was challenged by a number of respondents. From this point of view, the insufficient proficiency of the foreign students in the host language and the problem of the administrative staff in mastering English are closely related.

3   Language support

3.1 Language support to students

Which efforts do higher education institutions in Europe make to support students with language problems related to English proficiency and mastery of domestic languages? This issue was addressed in the Institutional Survey as well as in the Programme Survey. The picture emerging from the responses is that a considerable proportion of institutions offer language training both in English and the domestic language. As Chart III.2 below shows, training in the domestic language for the foreign students was more often mentioned than English language training for domestic or foreign students. This finding shows that training offers are in line with the language difficulties of students.

Chart III.2

Offer of language training especially tailored for students enrolled in ETPs – by type of respondent (%, multiple replies possible)
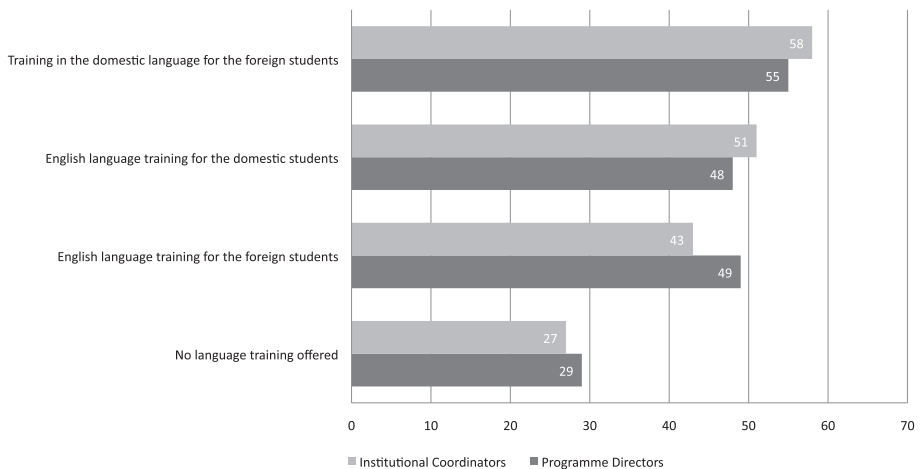
Source: Programme Questionnaire
Question 4.6: Does your institution offer language training especially tailored for students enrolled in English-Taught Programme(s)?
Source: Institutional Questionnaire
Question 3.5: Does your institution offer language training especially tailored for students enrolled in English-Taught Programme(s)?

Overall, less than one third of all responding programmes and institutions include no language training element at all (29% of the programmes and 27%

of the institutions). More than half offer support for improving the command of the domestic language (55% and 58%), about half offer training in English for domestic students (48% and 51%) and foreign students (49% and 43%). From the programme perspective, slightly more English support is offered to foreign students than domestic students who were perceived to be more proficient in English as shown in Sub-section 2 above. At the institutional level, however, more English support was said to have been provided to domestic students.

As Table III.5 shows, English language training is more often a characteristic of first-cycle, Bachelor programmes who, as we know from Part II.4, were also admitted with lower language test requirements when compared to Master students. The percentages of Bachelor-level ETPs offering English language training to foreign students and to domestic students (63% and 60%) are significantly higher than those of second-cycle, Master programmes (46% and 45%).

Among the regions compared, Bachelor students, both foreign and domestic, in South West Europe and South East Europe are much more likely to receive English support than those in other regions. This corresponds to the North-South divide that was mentioned earlier. The same emphasis on English language support to foreign Bachelor students was also found in Central East Europe, where there is a large share of English-taught Bachelor programmes and a serious problem perceived in the language proficiency of foreign Bachelor students.

Similarly, almost all Bachelor programmes (85%) in the Baltic region, and in particular Lithuania (79%), reported to have provided language support to their students, but the support is predominantly provided to domestic students. This does not come as a surprise knowing that ETPs in this region target largely domestic students (over 90% in Lithuania) (Table III.5, Table III.6 and Chart II.2).

As for training in domestic language, some 65% of both Bachelor and Master programmes in South West Europe, specifically France (71%) and Italy (68%), reported to have provided foreign students with domestic language training. The Nordic and Baltic regions, as well as South East Europe place substantially more emphasis on Bachelor students than Master students in the training of the domestic language (Table III.5 and Table III.6). Based on these observations, it seems that stronger emphasis on domestic language support is more likely to associate with new ETP offers on Bachelor level or in new areas of growth. This may have arisen from less developed English language services and thus a stronger need for the foreign students to communicate in the domestic language beyond the classroom.

Table III.5

Offer of language training especially tailored for students enrolled in ETPs – by region (%, multiple replies possible)

	Region						Total
	Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	
No language training offered							
Bachelor	23	8	33	19	21	0	19
Master	39	48	28	30	28	47	32
English language training for foreign students							
Bachelor	57	46	50	70	79	75	63
Master	49	41	53	48	36	20	46
English language training for domestic students							
Bachelor	47	85	46	49	79	100	60
Master	37	48	53	38	43	33	45
Training in the domestic language for foreign students							
Bachelor	67	62	42	51	64	50	55
Master	50	30	55	59	65	33	55
Total							
Bachelor	193	200	171	189	243	225	197
Master	175	167	189	175	172	133	178
Count (n)							
Bachelor	(30)	(13)	(24)	(47)	(14)	(16)	(144)
Master	(134)	(27)	(240)	(71)	(149)	(15)	(636)

Source: Programme Questionnaire
Question 4.6: Does your institution offer language training especially tailored for students enrolled in English-Taught Programme(s)?

One interesting observation, though not surprising, when comparing language support across individual countries, is that the Nordic countries display rather different patterns in the language support provided to students. Norwegian programmes reported that no English training is provided to the

students in ETPs, and only half of them provided domestic language training to foreign students. Next to Norway, only a small percentage of Danish programmes (11%) provided language support to foreign students. No language support is provided for domestic students in ETPs. The relative importance of language training (a small percentage of 32% programmes) is placed on the training in the domestic language for foreign students. Sweden, though providing a bit more support than Denmark and Norway, is comparatively "lax" in the provision of language support compared to many other European countries, especially the support for its own students. Finland is at the other extreme. A large majority of Finnish programmes (74-78%) provide all four categories of language support (Table III.6).

The differences among the Nordic countries, which are all established ETP providers, suggest that mature systems may have very different approaches to language support.

3.2 Language support to academic staff

According to most Programme Directors, specific means are employed to ensure or to enhance the English proficiency of academic staff involved in ETPs (see Table III.7). This is positively associated with the above response from them that about 95% of academic staff teaching in ETPs has good or very good proficiency in English.

Overall speaking, in about half of the Master programmes and some 70% of Bachelor programmes responded to the survey, English proficiency is an important selection criterion for the recruitment of new academic staff. Denmark, Turkey and Belgium are the countries where over 70% of ETPs reported that English is a selection criterion for new staff recruitment. On the contrary, Spain is the country where English proficiency is seldom considered a staff recruitment criterion, with less than one fifth of the programmes reporting that English is a selection criterion (Table III.8). Taking Turkey and Spain as examples, the use of English as a recruitment criterion does seem to have an impact on the perceived English proficiency of the teaching staff.

Almost as often, academic staff members are encouraged to improve, optionally, their English language proficiency (57% of those involved in Bachelor-level ETPs and 48% in Master-level ETPs). Denmark, Finland, Spain and Switzerland are the countries where such an optional language support is most likely offered to academic staff.

About one third of the respondents in both Bachelor and Master programmes stated that the institution offers English-language courses that are tailored to the needs of academic staff. In Hungary, the Netherlands, Finland, Denmark

Table III.6

Offer of language training especially tailored for students enrolled in ETPs – by country (%, multiple replies possible)

	Country																			Total
	AT	BE	CH	CZ	DE	DK	ES	FI	FR	HU	IT	LT	NL	NO	PL	RO	SE	TR	Other	
No language training offered	42	21	33	12	32	63	47	11	23	23	23	14	18	50	24	25	48	8	45	29
English language training for foreign students	38	51	47	64	46	11	38	78	37	71	51	43	75	0	48	42	43	67	30	49
English language training for the domestic students	42	49	53	38	50	0	44	74	35	35	58	79	65	0	62	67	24	92	39	48
Training in the domestic language for foreign students	46	49	67	52	58	32	47	78	71	74	68	50	49	50	55	33	39	42	44	55
Total	167	169	200	167	186	105	175	242	165	203	200	186	207	100	190	167	154	208	158	181
Count (n)	(24)	(39)	(15)	(42)	(129)	(19)	(32)	(65)	(52)	(31)	(53)	(14)	(57)	(8)	(29)	(12)	(67)	(12)	(84)	(784)

Source: Programme Questionnaire
Question 4.6: Does your institution offer language training especially tailored for students enrolled in English-Taught Programme(s)?

and Belgium, tailored English courses for academic staff are much more often offered when compared to others. It is worth noting that these countries are either leading providers of ETPs or the up-and-coming ones.

Mandatory English courses for academic staff, on the other hand, are rather rare (19% for Bachelor and 11% for Master) in general. However, country differences are observed. In Belgium and the Netherlands, respectively 59% and 42% of all the programme respondents reported that it is mandatory for academic staff to improve their English. Less so, but still one third of the programmes in Hungary and Lithuania reported the same. Except the Netherlands, such a mandatory measure appears to be more commonly adopted by the new providers than those that are established (e.g. Norway and Sweden where no programme reported such a measure).

The survey results also point to a general tendency for Bachelor programmes to employ more interventionist measures to ensure a high level of English proficiency among the teaching staff when compared with Master programmes. The largest discrepancy to this trend was found in Central East Europe where academic staff in Master programme received significantly more mandatory training (15% compared to 9% at Bachelor-level) and specific training tailored for their needs (40% compared to 21% at Bachelor level) than those in Bachelor programmes. On country level, it was also found that some countries are more interventionist than others either by including English proficiency as a recruitment criterion or requesting academic staff to improve their English with mandatory courses. Among all, Belgium, the Netherlands, Hungary and Lithuania appear to be more interventionist than other countries (e.g. Spain, Switzerland) when it comes to language enhancement measures (Table III.8).

Although the lack of English proficiency of academic staff has been perceived as an issue in the offering of ETPs in non-English-speaking countries, the results in this study suggest that this is a 'non-issue' because of the perceived high English standard of the academic staff involved in the teaching of such programmes (Table III.4) across the board. Spain is the only country where less than 90% of the Programme Directors rated the English of their academic staff positively. Correspondingly, less than 10% of all Programme Directors surveyed reported that there are consequences related to insufficient English proficiency of academic staff (Table III.9). Among all the countries compared, Denmark and Belgium are the strictest towards academic staff members who do not have a sufficient level of English, whereas Turkey and Lithuania reported a perfect satisfaction with the English proficiency of their academic staff and thus no problem to be dealt with. While potential bias of the responses cannot be ruled out, it is worth noting that these are also the four countries that are most likely to use English as a selection criterion for academic staff recruitment.

Table III.7

Employment of specific means to ensure and/or enhance the English proficiency of academic staff involved in the ETPs – by region (%, multiple replies possible)

	Region						Total
	Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	
No specific means							
Bachelor	6	15	13	15	7	33	14
Master	38	30	20	26	33	31	28
English proficiency is an important selection criterion for the recruitment of new academic staff							
Bachelor	81	62	71	60	79	67	69
Master	33	44	58	56	36	63	47
Academic staff is encouraged (optional) to improve their English language proficiency, where necessary							
Bachelor	77	69	50	49	71	27	57
Master	45	37	51	47	49	31	48
Academic staff is required (mandatory) to improve their English language proficiency, where necessary							
Bachelor	23	31	42	9	14	7	19
Master	3	7	18	15	7	13	11
The institution offers English-language courses that are tailored to the needs of academic staff							
Bachelor	45	31	38	21	21	20	30
Master	30	22	33	40	15	6	28
Other means are employed							
Bachelor	13	0	13	0	0	20	7
Master	4	11	5	3	1	19	4
Total							
Bachelor	245	208	225	153	193	173	196
Master	153	152	185	188	140	163	166
Count (n)							
Bachelor	(31)	(13)	(24)	(47)	(14)	(15)	(144)
Master	(139)	(27)	(240)	(72)	(152)	(16)	(646)

Source: Programme Questionnaire
Question 4.3: Does your programme/institution employ any specific means to ensure and/or enhance the English proficiency of academic staff involved in the English-Taught Programme(s)?

Table III.8

Employment of specific means to ensure and/or enhance the English proficiency of academic staff involved in the ETPs – by country (%, multiple replies possible)

	Country																			Total
	AT	BE	CH	CZ	DE	DK	ES	FI	FR	HU	IT	LT	NL	NO	PL	RO	SE	TR	Other	
No specific means	27	8	20	23	28	11	32	13	30	16	38	29	4	63	20	33	53	27	27	26
English proficiency is an important selection criterion for the recruitment of new academic staff	58	72	47	60	56	74	16	49	55	55	44	64	61	25	57	58	30	73	39	51
Academic staff is encouraged (optional) to improve their English language proficiency, where necessary	46	31	60	28	56	79	61	65	40	58	44	57	53	25	57	50	34	18	52	49
Academic staff is required (mandatory) to improve their English language proficiency, where necessary	12	59	0	9	3	5	6	15	6	29	9	29	42	0	7	17	0	9	6	13
The institution offers English-language courses that are tailored to the needs of academic staff	35	46	27	23	21	42	35	51	17	58	7	29	53	0	27	17	17	9	15	28
Other means are employed	8	15	0	2	6	0	0	12	2	0	2	7	0	13	3	8	0	36	4	5
Total	185	231	153	147	170	211	152	204	149	216	144	214	212	125	170	183	134	173	142	171
Count (n)	(26)	(39)	(15)	(43)	(127)	(19)	(31)	(68)	(53)	(31)	(55)	(14)	(57)	(8)	(30)	(12)	(70)	(11)	(85)	(794)

Source: Programme Questionnaire
Question 4.3: Does your programme/institution employ any specific means to ensure and/or enhance the English proficiency of academic staff involved in the English-Taught Programme(s)?

Table III.9

Consequences, if academic staff members involved in English-Language-Taught Programmes do not have a sufficient level of English – by country (%)

	Country																			Total
	AT	BE	CH	CZ	DE	DK	ES	FI	FR	HU	IT	LT	NL	NO	PL	RO	SE	TR	Other	
Not relevant. All staff have a sufficient proficiency	81	79	87	98	88	78	88	85	82	93	80	100	82	88	93	83	89	100	92	87
No consequences	4	3	7	0	6	0	6	9	8	3	6	0	2	0	0	8	4	0	5	5
Specific consequences	15	18	7	2	6	22	6	6	10	3	15	0	16	13	7	8	7	0	4	8
Total	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
Count (n)	(26)	(38)	(15)	(43)	(128)	(18)	(32)	(68)	(50)	(30)	(54)	(14)	(57)	(8)	(30)	(12)	(71)	(12)	(85)	(791)

Source: Programme Questionnaire
Question 4.4: If academic staff members involved in English-Language-Taught Programme(s) do not have a sufficient level of English, what are the consequences?

3.3 Language support to administrative staff

As in the case of teachers involved in ETPs, a large majority of the programmes indicated that specific means are employed to ensure or to enhance the English proficiency of administrative staff members (see Table III.10). English proficiency as an important selection criterion for the recruitment of new administrative staff was mentioned by 50% of the Programme Directors of Bachelor programmes and 43% of the Programme Directors of Master-level ETPs. Encouragement for administrative staff to improve their English language proficiency as an option plays often a role also (50% and 44%). About a third of the Programme Directors of Bachelor-level ETPs and a fifth of the Programme Directors of Master-level ETPs reported that English-language courses tailored to the needs of administrative staff are offered. Mandatory requirements for administrative staff to improve their English language proficiency on the other hand are rare (7% and 8%).

A comparison of answers by country (Table III.11) shows that English proficiency as an important selection criterion for the recruitment of new administrative staff was mentioned most frequently by Programme Directors from Austria (62%), Czech Republic (62%), Hungary (61%), Switzerland (60%) and France (60%). In most countries, encouraging administrative staff to improve their English by optional means was frequently reported, except the Czech Republic where using English as a recruitment criterion is a predominant measure. Although mandatory measures to improve the English proficiency of administrative staff are rare, nearly one fifth of the programmes in the Netherlands, Romania and Italy reported to have requested their staff to undertake such training.

The Netherlands, amongst all countries compared, is the one that has placed the highest importance on the English proficiency of their administrative staff by tackling the problem from all directions (Table III.11). This does not come as a big surprise knowing that it is also the leading provider of ETPs in non-English-speaking countries with nearly 20% of the programmes taught in English and 61% of its institutions involved (Table I.4).

Table III.10

Employment of specific means to ensure and/or enhance the English proficiency of administrative staff involved in the ETPs – by region (%, multiple replies possible)

	Region						Total
	Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	
No specific means							
Bachelor	28	31	8	19	7	44	22
Master	42	26	22	26	23	50	28
English proficiency is an important selection criterion for the recruitment of new academic staff							
Bachelor	47	46	63	56	50	25	50
Master	26	44	51	50	43	44	43
Academic staff is encouraged (optional) to improve their English language proficiency, where necessary							
Bachelor	47	46	54	46	71	44	50
Master	35	44	51	33	47	19	44
Academic staff is required (mandatory) to improve their English language proficiency, where necessary							
Bachelor	6	0	21	2	0	13	7
Master	1	19	7	13	12	6	8
The institution offers English-language courses that are tailored to the needs of academic staff							
Bachelor	28	8	33	21	36	31	26
Master	20	19	29	16	17	6	22
Other means are employed							
Bachelor	6	0	8	0	0	0	3
Master	1	0	4	0	1	6	2
Total							
Bachelor	163	131	188	144	164	156	157
Master	126	152	164	137	144	131	147
Count (n)							
Bachelor	(32)	(13)	(24)	(48)	(14)	(16)	(147)
Master	(137)	(27)	(241)	(70)	(148)	(16)	(639)

Source: Programme Questionnaire
Question 4.5: Are there any specific means to ensure and/or enhance the English proficiency of administrative staff involved in the English-Taught Programme within your institution?

Table III.11

Employment of specific means to ensure and/or enhance the English proficiency of administrative staff involved in the ETPs - by country (%, multiple replies possible)

	Country																			Total
	AT	BE	CH	CZ	DE	DK	ES	FI	FR	HU	IT	LT	NL	NO	PL	RO	SE	TR	Other	
No specific means	27	28	7	26	22	21	25	25	20	10	26	36	13	75	17	58	54	42	27	27
English proficiency is an important selection criterion for the recruitment of new administrative staff	62	49	60	62	51	47	19	39	60	61	41	43	50	25	48	25	19	25	41	45
Administrative staff is encouraged (optional) to improve their English language proficiency, where necessary	46	38	60	14	53	53	59	52	36	52	39	50	59	25	59	33	20	42	51	45
Administrative staff is required (mandatory) to improve their English language proficiency, where necessary	4	10	0	14	5	0	3	3	10	10	17	7	20	13	0	17	1	8	11	8
The institution offers English-language courses that are tailored to the needs of administrative staff	27	33	27	14	25	32	38	34	16	19	13	7	38	0	21	25	9	25	14	22
Other means are employed	0	0	7	0	8	0	3	1	0	0	2	0	2	0	0	0	4	0	1	2
Total	165	159	160	131	164	153	147	155	142	152	137	143	180	138	145	158	107	142	145	149
Count (n)	(26)	(39)	(15)	(42)	(129)	(19)	(32)	(67)	(50)	(31)	(54)	(14)	(56)	(8)	(29)	(12)	(70)	(12)	(85)	(790)

Source: Programme Questionnaire
Question 4.5: Are there any specific means to ensure and/or enhance the English proficiency of administrative staff involved in the English-Taught Programme within your institution?

Part IV – Impact of ETPs

Irina Ferencz (ACA), Friedhelm Maiworm (GES)

1 Impact on institutional policies and administrative procedures

Which wider effects did the introduction of teaching in English have on a higher education institution, on its different units, and on teachers and students? Is there any impact, be it of an expected or an unexpected sort? The Institutional Survey addressed the issue of impact that ETPs might have had since their introduction.

The most frequently mentioned effects are an improved international profile/ awareness of the institutions (84%), the strengthening of cooperation with foreign partner universities/institutions (81%) and the improvement of assistance/guidance/advice for foreign students (71%) (Table IV.1). These were the top three perceived effects in all country groups and in the exact same order, with the exception of the Baltic states, in which the strengthening of cooperation with foreign partner universities/institutions ranks third (and not second, as in all other regions) (Table IV.2). Furthermore, as a result of ETPs, 56% of respondents declared to attribute higher importance to marketing and promotion in general, as well as to the "targeted recruitment of students" in particular (54%) (Table IV.1). Further effects are the increased offers for English language training (51%) and a higher flexibility in the admission of foreign students (50%).

As Table IV.1 further shows, the perceived effects do vary by type of institution. Institutional Coordinators from institutions awarding as highest degree a PhD stated more often a higher flexibility in the admission of foreign students and more targeted recruitment of students as an impact of running ETPs compared to institutions awarding only Master or Bachelor degrees. At the same time, ETPs have led to much a lesser extent more targeted recruitment of students in institutions awarding up to a Master degree, compared to institutions awarding a Bachelor and a PhD as highest degrees.

Table IV.1

Changes of institutional policies and administrative procedures caused by the introduction and running of English-Taught Programme(s) – by highest degree awarded by the institution (%*)

	Highest degree awarded			Total
	Bachelor or equivalent	Master or equivalent	Doctoral degree	
Improved the international profile/ awareness of your institution	84	83	85	84
Strengthening of the cooperation with foreign partner universities/ institutions	84	81	80	81
Improvement of assistance/ guidance/advice for foreign students	64	69	72	71
Increase of marketing activities of the institution	60	49	59	56
More targeted recruitment of students	50	44	58	54
Increase the offers for English language training	58	45	52	51
More flexibility in the admission of foreign students	39	45	53	50
Count (n)	(25)	(112)	(264)	(401)

Source: Institutional Questionnaire
Question 3.8: To what extent has the introduction and running of English-Taught Programme(s) led to the following changes of institutional policies and administrative procedures?
* Scale points 5 and 4 on a scale from 1 = 'not important at all' to 5 = 'very important'

The responses per country groups show some additional interesting insights (Table IV.2). Leaving the top three stated effects aside, the Nordic countries reported a lower than average impact of ETPs in all remaining areas, namely marketing activities of the institution (40% vs. 56%), targeted recruitment of students (49% vs. 54%), offer of English-language training (31% vs. 50%) and flexibility in the admission of foreign students (36% vs. 50%). In contrast, the Baltic states reported the biggest changes across the four areas of all country groups, with values of 73%, 73%, 57% and 67% respectively. Overall though, ETPs seem to have generated the biggest impact across the seven areas in South East and South West Europe, where the responses across all and across six of the items are higher than average. Comparatively speaking, the lowest impact seems to be registered in Central West Europe (where the impact on each area is below average).

Table IV.2

Changes of institutional policies and administrative procedures caused by the introduction and running of English-Taught Programme(s) – by region (%*)

	Region						Total
	Nordic	Baltic	Central West Europe	Central East Europe	South Wes Europe	South East Europe	
Improved the international profile/awareness of your institution	87	82	82	80	90	88	84
Strengthening of the cooperation with foreign partner universities/ institutions	83	73	77	80	83	88	81
Improvement of assis- tance/guidance/advice for foreign students	71	77	69	73	66	71	70
Increase of marketing activities of the institution	40	73	50	68	58	64	56
More targeted recruitment of students	49	73	43	57	60	64	54
Increase the offers for English language training	31	57	41	65	53	71	50
More flexibility in the admission of foreign students	36	67	37	60	57	66	50
Count (n)	(68)	(22)	(111)	(81)	(77)	(42)	(401)

Source: Institutional Questionnaire
Question 3.8: To what extent has the introduction and running of English-Taught Programme(s) led to the following changes of institutional policies and administrative procedures?
* Scale points 5 and 4 on a scale from 1 = 'not important at all' to 5 = 'very important'

Some clear differences were observed also between individual countries, not only between different regions, when it comes to reported effects of ETPs (see Table IV.3). Overall, the biggest effects were stated by Institutional Co-ordinators from Bulgaria, France, Hungary, Latvia, the Netherlands, Poland, Romania, Slovakia and Turkey, while the impact of ETPs was clearly below the average in Austria, Switzerland and Norway. It is still a question though if indeed the effects were bigger in the first group of countries, or whether one of the two following situations occurred: the respondents from the first group were more prone to make more positive assessments than respondents in

the second group or rather that the effects, while felt in the second group of countries were not necessarily the result of ETPs, but of other factors.

A high impact with respect to single aspects (reported by at least two thirds of respondents) could be observed in specific countries, as follows:

– *Improved international profile/awareness of the institution:* The Netherlands (100%), Denmark (94%), Sweden (92%) and France (90%).

– *Strengthening of the cooperation with foreign partner universities/institutions:* Switzerland (100%), Denmark (94%) and Belgium (91%).

– *Improvement of assistance/guidance/advice for foreign students:* Sweden (83%), Belgium (82%) and the Netherlands (82%).

– *Increase of marketing activities of the institution:* Lithuania (77%), the Netherlands (75%), Hungary (73%) and France (72%).

– *More targeted recruitment of students:* Sweden (85%), the Netherlands (75%) and France (74%).

– *Increase the offers for English language training:* Romania (78%), Turkey (74%) and Poland (70%).

– *More flexibility in the admission of foreign students:* France (68%), Lithuania (67%) and Romania (67%).

Table IV.3

Changes of institutional policies and administrative procedures caused by the introduction and running of English-Taught Programme(s) – by country of institution (%*)

	Country																			Total
	AT	BE	CH	CZ	DE	DK	ES	FI	FR	HU	IT	LT	NL	NO	PL	RO	SE	TR	Other	
Improved the international profile/awareness of your institution	88	73	67	69	79	94	85	86	90	87	89	69	100	73	85	89	92	79	93	84
Strengthening of the cooperation with foreign partner universities/institutions	67	91	100	76	75	94	85	82	85	80	71	62	75	87	85	89	64	78	90	81
Improvement of assistance/guidance/advice for foreign students	63	82	67	71	67	73	62	77	67	73	61	77	82	53	77	67	83	68	74	70
Increase of marketing activities of the institution	47	30	50	44	50	56	38	32	72	73	47	77	75	13	68	44	69	68	68	56
More targeted recruitment of students	31	45	33	35	40	50	38	50	74	53	59	69	75	20	61	56	85	63	66	54
Increase the offers for English language training	44	55	50	56	37	25	69	45	50	60	47	42	42	20	70	78	25	74	65	50
More flexibility in the admission of foreign students	44	27	17	44	41	56	31	18	68	53	47	67	25	27	64	67	42	63	74	50
Count (n)	(18)	(11)	(6)	(17)	(64)	(16)	(13)	(22)	(39)	(15)	(18)	(13)	(12)	(15)	(40)	(9)	(13)	(19)	(41)	(401)

Source: Institutional Questionnaire
Question 3.8: To what extent has the introduction and running of English-Taught Programme(s) led to the following changes of institutional policies and administrative procedures?
* Scale points 5 and 4 on a scale from 1 = 'not important at all' to 5 = 'very important'

2 Benefits of ETPs

The Programme Directors were asked, through an open question, which they thought the main benefits of ETPs were, in comparison with study programmes taught in the domestic language, for the participating students and for the institution as a whole.

Concerning the benefits of ETPs for students, the most often cited ones can be grouped in the following categories:

– Improve the mastery of the English language, which is perceived by many Programme Directors as an essential element for students to be more successful in their future career. In some disciplines, like Computer Science this is a must, as the core terminology is already in English.

– Closer interaction with teachers – because of the in general smaller teacher-student ratio, students in ETPs benefit from closer guidance from their teachers, which enhances the quality of their education.

– More mobility opportunities – ETPs enable the creation of more structured mobility arrangements with specific international partners, that ETP students can take advantage of.

– Good preparation for working in an international and intercultural environment – because of their more international nature (multinational student body, curriculum integrating international elements, etc.). ETPs offer a better preparation for students to work on the international labour market.

– Higher employability – again, related to the international nature of ETPs, the ensuing degree gives better access to the labour market by opening more possibilities than graduates from domestic language programmes actually have. The Programme Directors also believed that an ETP degree is perceived as more valuable by potential employers.

– Better networking – thanks to the multinational composition of the student body in ETPs, students (that are often mature students, especially at Master level) establish contacts with classmates from other countries, which they could later resort to also for professional purposes.

The Programme Directors mentioned some other benefits, also for their institutions, in additions to the elements that were mentioned above under Impact, namely:

– ETPs are seen by some as an important means to increase the quality of the educational offer, as they enable institutions to "attract" or recruit better qualified staff and students. Through ETPs, institutions gain access to a global pool of talent that they can select from.

– ETPs are also praised for helping institutions and the study programmes in question to build an international network of partner universities, programmes, partner companies and international alumni, and thus develop closer relations and ties with "externals" that are perceived as beneficial.

3   ETPs and the development of student support services in English

One of the impact areas mentioned above in Tables IV.1-3 is the improvement of assistance/guidance/advice for foreign students. An important item that fits under this broader category is the provision of relevant documents and information in English. Although the Institutional Coordinators were not explicitly asked if the provision of such materials was the result of the introduction of ETPs, it could be expected that the respective developments are at least in part influenced by the ETPs. Overall, the majority of institutions (approx. 85%) stated an availability of at least some relevant documents in English (Table IV.4). Quite surprisingly though, according to the results there also seem to be ETPs for which no information is provided in English. Unless the respective programmes targeted exclusively domestic students or students that spoke the domestic language, we would find such cases quite surprising.

The information most frequently offered in English is on admission requirements and application procedures (84%), on the study programme itself (83%) and on orientation and welcoming services (80%). This is not surprising though, given that this is the core information needed by students before they decide to apply for a specific study programme. In contrast, less than half of Institutional Coordinators reported to provide information on academic/psychological counselling services, student representation regulations or career and alumni services in English. In many cases though, the lower values might be due to either the fact that such services are not open to foreign students studying in ETPs (e.g. student representation) or that the institutions in question do not offer such services to begin with (e.g. career and alumni services).

Table IV.4

**Documents relevant for foreign students that are provided in English –
by highest degree awarded at the institution
(%, multiple replies possible)**

	Highest degree awarded			Total
	Bachelor or equivalent	Master or equivalent	Doctoral degree	
Information about admission require-ments and application procedures	72	88	84	84
Programme description	75	87	82	83
Orientation and welcoming information	66	82	81	80
Information about the International Office and its responsibilities	66	83	79	79
Student accommodation information	69	78	81	79
Information about visa requirements	63	82	77	78
Course selection information	69	78	74	75
Library information	53	64	70	67
Examination regulations	63	72	63	66
University/Municipality registration information	56	64	65	64
On-campus recreational facilities/ social activities information	50	58	67	64
IT support information	44	66	64	63
Student financial support information	47	51	49	50
Academic/Psychological counselling services information	38	45	47	46
Student representation regulations	44	41	42	42
Career and alumni services information	31	44	42	42
No documents provided in English/ Not ticked	22	12	15	15
Other documents	13	12	12	12
Total	938	1,108	1,095	1,088
Count (n)	(32)	(130)	(330)	(492)

Source: Institutional Questionnaire
Question 3.6: Which of the following documents that are relevant for foreign students are provided by your institution in English?

As Table IV.4 further shows, the provision of relevant documents in English is less frequent in institutions awarding a Bachelor as highest degree, while the differences between institutions awarding a Master and respectively a PhD are rather small.

Looking at the provision of relevant information in English by country groups it is clear that the Nordic countries are in the lead, followed by the Baltic states (Table IV.5). Nordic respondents scored higher than average on all categories of documents, while respondents from the Baltic states did so for ten categories. At the other end of the spectrum is South West Europe, which is below average across all categories. This region also records the highest share of respondents that don't offer any documents in English. Central West and Central East Europe are more or less in a similar position with regards to the provision of relevant documents in English, while South East Europe follows them closely.

Table IV.5

Documents relevant for foreign students that are provided in English – by region (%, multiple replies possible)

	Region						Total
	Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	
Information about admission requirements and application procedures	91	92	83	84	77	80	83
Programme description	91	92	80	84	75	80	82
Orientation and welcoming information	91	92	79	78	73	69	79
Information about the International Office and its responsibilities	87	88	81	76	70	74	78
Student accommodation information	91	92	76	79	70	74	78
Information about visa requirements	86	92	76	75	71	72	77
Course selection information	88	88	74	72	64	72	74
Library information	87	79	61	66	57	65	66
Examination regulations	88	75	60	69	52	57	65

	Region						Total
	Nordic	Baltic	Central West Europe	Central East Europe	South West Europe	South East Europe	
University/Municipality registration information	83	54	66	58	51	63	63
On-campus recreational facili- ties/social activities information	79	58	58	62	62	59	63
IT support information	88	67	58	57	56	59	63
Student financial support information	65	33	53	40	42	50	49
Academic/Psychological coun- selling services information	78	42	49	27	35	44	45
Student representation regula- tions	69	42	38	35	29	46	41
Career and alumni services information	62	42	42	32	36	37	41
No documents provided in English/Not ticked	9	8	17	15	21	19	16
Other documents	16	17	13	8	13	11	12
Total	1,425	1,213	1,107	1,068	1,001	1,074	1,128
Count (n)	(77)	(24)	(144)	(95)	(104)	(54)	(498)

Source: Institutional Questionnaire
Question 3.6: Which of the following documents that are relevant for foreign students are provided by your institution in English?

When it comes to ETPs in individual countries (Table IV.6), the sampled programmes in Lithuania stand out, as they offer all information (100%) related to admission requirements and application procedures, programme description, orientation and welcoming, student accommodation, the international office and visa requirements in English. So do the Belgian ETPs covered by the study, when it comes to information about admission requirements and application procedures and orientation and welcoming, as well as the Italian programmes, but on admission requirements and application procedures only. Based on the number of categories on which each country is positioned above average and the size of the respective shares, the five countries offering most complete information in English across the dimensions covered in Table IV.6 are Denmark, Finland, Norway, Lithuania and Sweden. On the other side, about one third of the ETPs covered in the study from Switzerland, France and the Netherlands offer no documents in English.

Table IV.6

Documents relevant for foreign students that are provided in English – by country (%, multiple replies possible)

	Country									
	AT	BE	CH	CZ	DE	DK	ES	FI	FR	HU
Information about admission requirements and application procedures	89	100	67	89	84	94	84	92	63	88
Programme description	89	83	67	89	82	94	84	92	63	88
Orientation and welcoming information	84	100	67	84	80	94	79	92	61	88
Student accommodation information	74	92	67	89	78	94	84	92	54	88
Information about the International Office and its responsibilities	89	92	67	89	83	94	84	84	54	71
Information about visa requirements	74	83	67	84	80	94	79	92	61	82
Course selection information	84	75	67	84	75	88	63	92	56	71
Library information	63	58	50	84	61	82	53	92	46	71
Examination regulations	68	92	58	89	53	94	47	88	44	71
University/Municipality registration information	68	92	58	74	64	82	53	88	41	53
On-campus recreational facilities/social activities information	58	75	58	79	53	71	68	88	51	71
IT support information	58	75	50	84	57	82	63	92	42	59
Student financial support information	47	58	58	47	53	76	37	72	32	47
Academic/Psychological counselling services information	58	58	67	42	40	71	37	80	25	35
Student representation regulations	58	42	42	26	28	59	26	76	24	35
Career and alumni services information	47	42	58	32	36	71	47	64	32	29
No documents provided in English/Not ticked	5	0	33	11	16	6	16	8	34	12
Other documents	26	0	17	11	11	24	16	12	14	12
Total	1,142	1,217	1,017	1,189	1,033	1,371	1,021	1,396	797	1,071
Count (n)	(19)	(12)	(12)	(19)	(83)	(17)	(19)	(25)	(59)	(17)

See previous page

	Country									Total
	IT	LT	NL	NO	PL	RO	SE	TR	Other	
Information about admission requirements and application procedures	100	100	67	88	81	90	88	70	82	82
Programme description	90	100	67	88	81	80	88	74	82	81
Orientation and welcoming information	90	100	67	88	73	80	88	59	76	78
Student accommodation information	90	100	67	88	75	90	88	67	75	78
Information about the International Office and its responsibilities	90	100	61	82	77	90	88	67	71	77
Information about visa requirements	80	100	67	82	71	80	69	63	76	76
Course selection information	85	92	61	82	65	70	88	70	75	74
Library information	75	85	67	88	58	90	81	48	73	66
Examination regulations	75	69	61	82	65	60	88	44	67	64
University/Municipality registration information	75	46	61	76	52	60	81	56	65	63
On-campus recreational facilities/social activities information	70	54	67	88	54	80	69	48	63	62
IT support information	80	69	61	88	46	70	88	44	65	62
Student financial support information	60	23	56	65	38	30	50	48	49	49
Academic/Psychological counselling services information	55	31	61	82	19	40	75	44	43	45
Student representation regulations	45	38	56	59	35	40	81	41	45	41
Career and alumni services information	40	38	50	53	29	40	69	26	39	41
No documents provided in English/Not ticked	0	0	33	12	17	10	13	26	18	17
Other documents	5	15	11	12	8	10	19	11	10	12
Total	1,205	1,162	1,039	1,306	944	1,110	1,306	907	1,073	1,068
Count (n)	(20)	(13)	(18)	(17)	(48)	(10)	(16)	(27)	(51)	(502)

Source: Institutional Questionnaire
Question 3.6: Which of the following documents that are relevant for foreign students are provided by your institution in English?

Postscript

Bernd Wächter (ACA)

Many of the results of this study could have been anticipated, and therefore came as no surprise. Others were indeed unexpected.

What the authors had expected was that the number of universities and colleges offering ETPs would be considerably beyond those of our last (2007) surveys, and that the overall number of ETPs on offer across Europe would likewise have risen substantially. What none of us had expected was that the increase would be as steep as it turned out to be. In the year 2001, we had identified slightly over 700 programmes. In 2007, this number had more than trebled, to almost 2,400. In the 2014 exercise, we found over 8,000 ETPs. This looks like sensational growth and, indeed, it is. The numbers of 2001, 2007 and 2014 are, however, not easily comparable. In 2001, our only sources of identification of ETPs were our surveys. In 2007, quite a number of countries already had online databases, which we of course also used for the identification of ETPs. In 2014, we had the advantage of the existence of StudyPortals and its Europe-wide database of English-medium programmes. However, all of this casts little doubt on the validity of the 2014 figures. It rather makes us conjecture that the numbers in our earlier studies were an underrepresentation of the ETPs offered at the time.

Does that mean that ETPs are no longer a marginal phenomenon, as we concluded in 2001, and quite a modest one, as we felt in 2007? It does and it does not. The number of programmes has risen steeply. ETPs now make up nearly six percent of all programmes across Europe. But the share of students enrolled in ETPs of all students in the system remains very low, at 1.3%. By the measure of enrolment, ETPs are marginal still today.

European averages are, of course, somewhat treacherous. For ETPs remain very unevenly distributed over countries. The Alps still are an 'ETP watershed', as we put it in our earlier publications. The ETP leaders remain the Netherlands together with Europe's Nordic countries. We were surprised by the Baltic countries, who are the 'runners up' in the present publication, and who played no major role in our earlier studies. Germany, France and Central West Europe are in midfield. In the southern parts of Europe ETPs are few and far between - with the exception of Cyprus.

Are we likely to see further growth at the rate of the past? There are some indications that growth has passed its peak. In this study, we found declining growth rates since the years 2009 and 2010. In order not to be misunderstood: we are here not talking of declining numbers of ETPs, but of less

steep annual increases. If this will develop into a medium- or long-term trend is difficult to predict. We intend to revisit the European ETP landscape before 2020 once again.

In our last study, we concluded that the very heated and often highly ideological debates about the quality of English of both teaching staff and students were over and that English-medium instruction had become a no longer exotic and therefore normal feature of Europe's higher education systems. With a sigh of relief, we felt there was "normalcy, at last". Were we right? It is not clear at all. On the one hand, the warnings that the quality of teaching and learning in ETPs will necessarily be lower than that in the native language due to an insufficient command of English of all parties have not fully disappeared. Nor are worries no longer voiced that teaching in English would lead to a large number of languages disappearing as a means of scientific expression. On the other hand, administrative staff at central university level and Programme Directors 'on the ground' have in none of our earlier studies perceived fewer problems with the mastery of English by students (domestic as well as foreign) and teaching staff alike. What came as a slight surprise was that the central-level administrators saw more of these problems than the Programme Directors. But in both cases, the extent of the problems identified was small.

How can we explain the fact that the quality debate about ETPs goes on while those closely involved in ETPs see hardly any problems at all? We do not have an absolutely watertight answer to this question. But we believe that expectations *vis-à-vis* the necessary degree of the mastery of English differ between those actually involved the delivery of ETPs and those dealing with language issues and policies in general, and multilingualism in particular. Both 'camps' could probably agree that there remains room for improvement in the 'ETP classroom', to put it in a diplomatic way. But the practitioners on the ground appear to have developed a higher degree of 'language pain tolerance' and an acknowledgement of the fact that, whenever non-native speakers interact, some concessions on the beauty of expression have to be made.

What is ACA?

Founded in 1993, the Academic Cooperation Association (ACA) is a not-for-profit pan-European network of major organisations responsible in their countries for the promotion of internationalisation in education and training. Current membership is comprised of 29 such organisations in 18 European countries, as well as associate members from the Americas, Canada and Australia. ACA's secretariat is located in Brussels, Belgium, in easy reach of the European institutions.

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This is the third study on English-medium instruction of the Academic Cooperation Association (ACA). Like its predecessors, this report maps the provision of English-taught Bachelor and Master programmes in non-English-speaking European countries. Using the results of its predecessor publications as historical references, the present study is able to trace the quantitative – and, to an extent, qualitative – development of English-medium instruction over a 12-year period.

The number of English-taught Bachelor and Master programmes has risen by almost 1,000% in the period since 2002. Growth in student enrolment in these programmes has been far more moderate, however. Furthermore, there remain huge differences between individual countries, especially in the form of a North-South divide. As in our earlier reports, the Nordic countries and the Netherlands are the leading providers. The runners-up are the Baltic States. Southern European countries are still largely 'abstentious'. The bulk of the provision of English-medium instruction is concentrated in programmes at the Master level.