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English-Taught Master's Programs in Europe: A 2013 Update

Prepared by Megan Brenn-White and Elias Faethe

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809 United Nations Plaza

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www.iie.org

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Report Authors

Megan Brenn-White is managing director of The Brenn-White Group, LLC. The Brenn-White Group (www.brenn-white.com) provides marketing, strategy, training and translation services with a focus on helping universities and higher education organizations reach their international goals.

Elias Faethe is head of the Intelligence Unit at StudyPortals. StudyPortals publishes a set of websites that help students to find and compare all their on-campus education options across Europe, and all online studies worldwide.

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Alice Lam, project associate, The Brenn-White Group, LLC
Edwin van Rest, chief executive officer, StudyPortals

Press inquiries:

Sharon Witherell

Director, Public Affairs

switherell@iie.org

+1 212 984 5380

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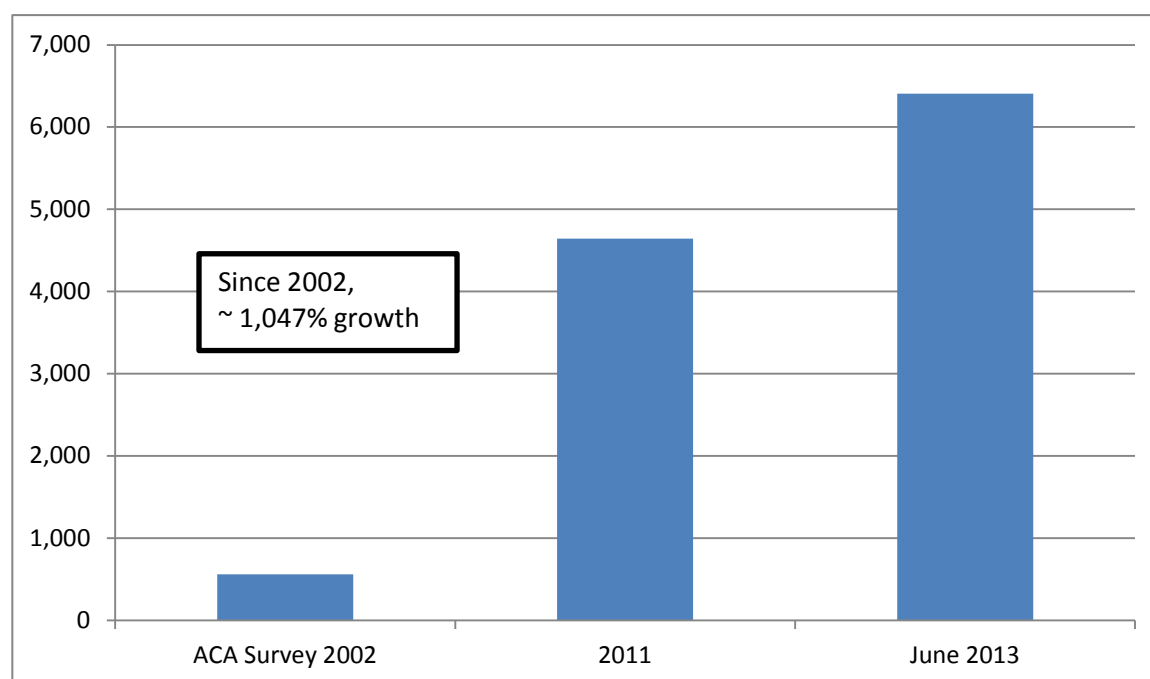
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English-Taught Master's Programs in Europe: 2013 Update

In recent years, European countries in which English is not the primary language of instruction have developed an increasing number of programs taught either fully or partly in English in order to serve domestic demand for higher education in English and to attract students from around the world. In an IIE briefing paper published in 2012, we looked at trends related to English-taught master's programs in Europe. We were able to gain new insights into the types of programs that were on offer, as well as the types of programs international students were looking for. This paper takes another look at data from StudyPortals.eu, the most comprehensive website related to educational offerings in Europe, in order to get a sense of where the market is going. In 2011, StudyPortals estimated that 90 percent of English-taught master's programs in Europe were represented on the website, which makes it a remarkably accurate reflection of the situation on the ground.

As of June 2013, according to StudyPortals.eu, the total number of English-taught programs in Europe was 6,407, representing a 38 percent increase since 2011. This number can be broken down into courses taught entirely in English and partially in English, with the largest growth occurring in the former category. The number of master's programs taught entirely in English rose from 3,701 at the end of 2011 to 5,258 in June 2013, an increase of 42 percent occurring in the remarkably short span of one and a half years. Programs taught partially in English increased from 963 to 1,149 over the same period, a 19 percent increase.

Figure 1: Overall Growth in English-Taught Programs Since 2002



The overall number of master's programs in Europe has also been growing, but not as quickly as the number of English-taught programs. From 2011 to June 2013, the number of master's degree programs offered by 1,200 public and private universities across Europe rose to 21,000, an increase of 25 percent.

Programs by Host Country

Figure 2 shows the increase in English-taught master's programs in top host countries from 2007 to 2013. Although the Netherlands and Germany still lead the way in offerings of English-taught master's programs, since 2011 the fastest growth rates have been in Denmark and Sweden, at 74 percent and 73 percent, respectively. As we stated in our previous report, Scandinavian countries have switched almost all their postgraduate teaching to English. Italy, Finland and France also displayed growth rates of over 40 percent since 2011.

Many factors influence the prevalence of English-taught programs across countries. They include whether or not institutions are allowed to charge tuition to international students, government policies regarding the provision of English-taught courses, the capacity to offer courses in English, and simple perceived market demand.

Figure 2: English-Taught Master's Programs at MastersPortal.eu (by Country and Year)

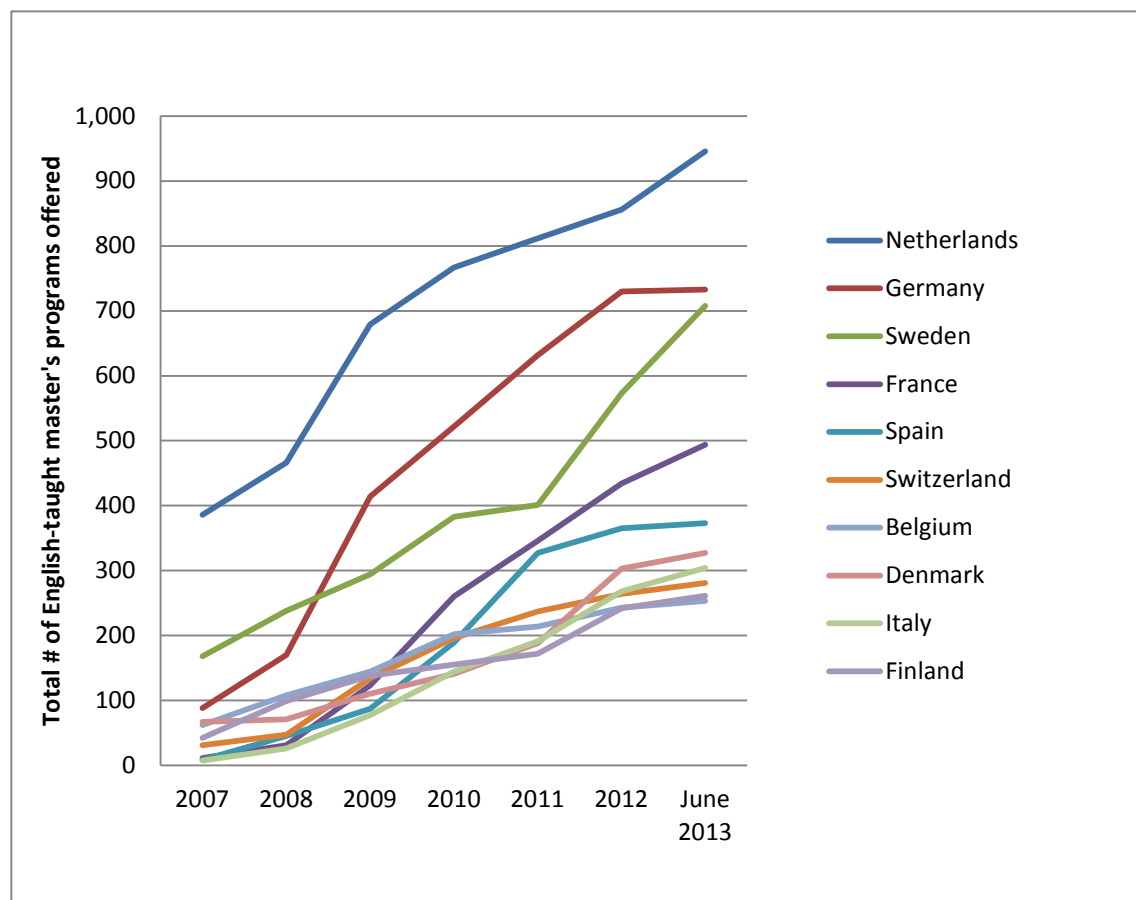


Table 1 shows countries with the greatest percentage increase in English-taught master's programs since 2011. It shows that Nordic countries, despite an already high number of English-taught master's programs relative to population, have continued to add programs quickly over this time period. Italy experienced rapid growth of 60 percent since 2011, but from the low base of 191 programs in a country

of nearly 60m people. France, starting from 346 programs in 2011, also experienced rapid growth of 43 percent.

Table 1: Increase in English-Taught Master's Programs Listed on MastersPortal.eu

	Total # of programs offered Dec 2011	Total # of programs offered June 2013	Percent increase
Europe	4,644	6,407	38%
Denmark	188	327	74%
Sweden	401	708	73%
Italy	191	304	60%
Finland	172	261	52%
France	346	494	43%
Switzerland	237	281	19%
Belgium	214	253	18%
Netherlands	812	946	16%
Spain	327	373	14%
Germany	632	733	13%

Table 2 shows the change in ranking of European countries by number of English-taught master's programs offered in 2007, 2011 and 2013. Nordic countries, the Netherlands and Germany were early leaders in English-taught master's programs, while countries where Romance languages are spoken had few English-taught master's programs until more recently. The top three spots have been consistently held by the Netherlands, Sweden and Germany. Since 2011, France and Spain have maintained the fourth and fifth spots, even as many new programs have been created in Denmark and Italy.

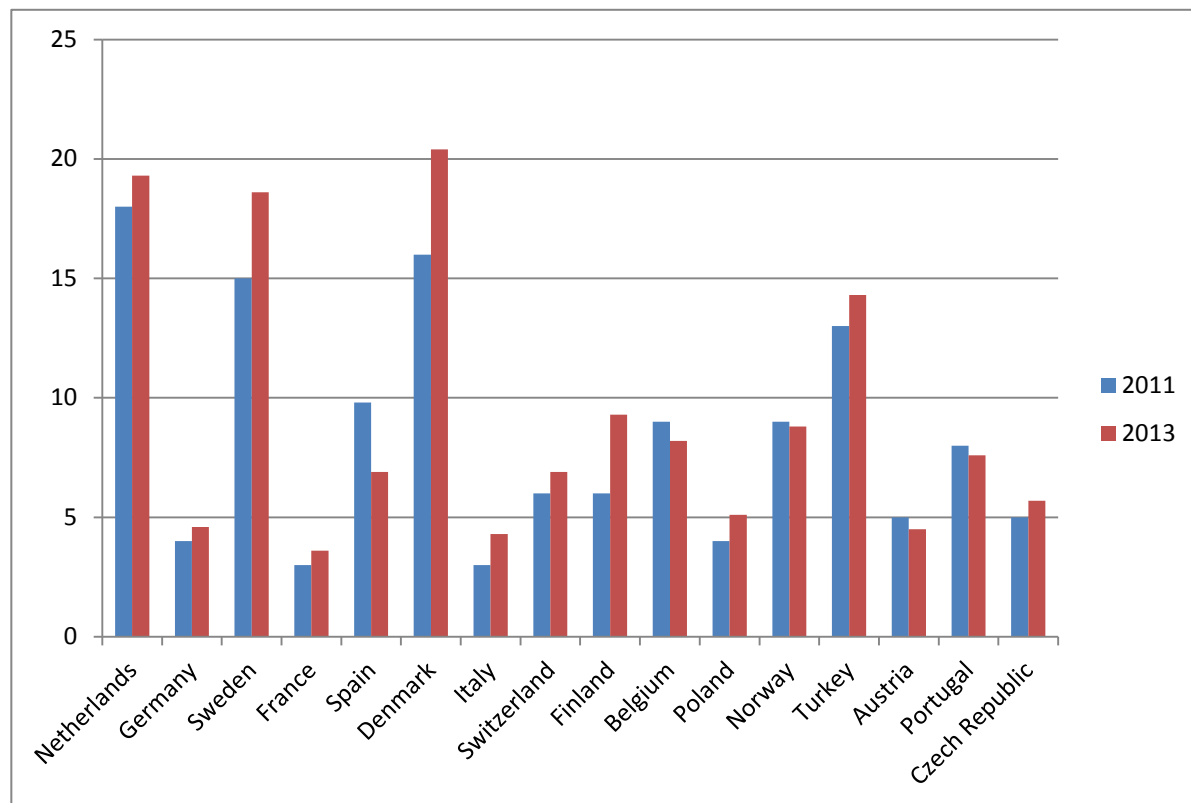
Table 2: Ranking of European Countries by Number of English-Taught Master's Programs

	2007	2011	2013
1	Netherlands (386)	Netherlands (812)	Netherlands (946)
2	Sweden (168)	Germany (632)	Germany (733)
3	Germany (88)	Sweden (401)	Sweden (708)
4	Denmark (67)	France (346)	France (494)
5	Belgium (62)	Spain (327)	Spain (373)
6	Finland (42)	Switzerland (237)	Denmark (327)
7	Switzerland (31)	Belgium (214)	Italy (304)
8	France (11)	Italy (191)	Switzerland (281)
9	Spain (8)	Denmark (188)	Finland (261)
10	Italy (7)	Finland (172)	Belgium (253)

Figure 3 shows the average number of English-taught programs per higher education institution (HEI) in selected countries in Europe. Countries are placed from left to right in order of most to fewest English-taught master's programs in 2013. Denmark leads the way in programs per HEI, with an average of 20.4 programs offered per institution in 2013. France offers the fewest English-taught programs per institution, an average of 3.6 in 2013. In most countries, institutions appear to be increasing their

offerings of English-taught master's programs. However, since 2011 the average number of English-taught master's programs per HEI declined in Spain, Austria, Portugal, Norway and Belgium.

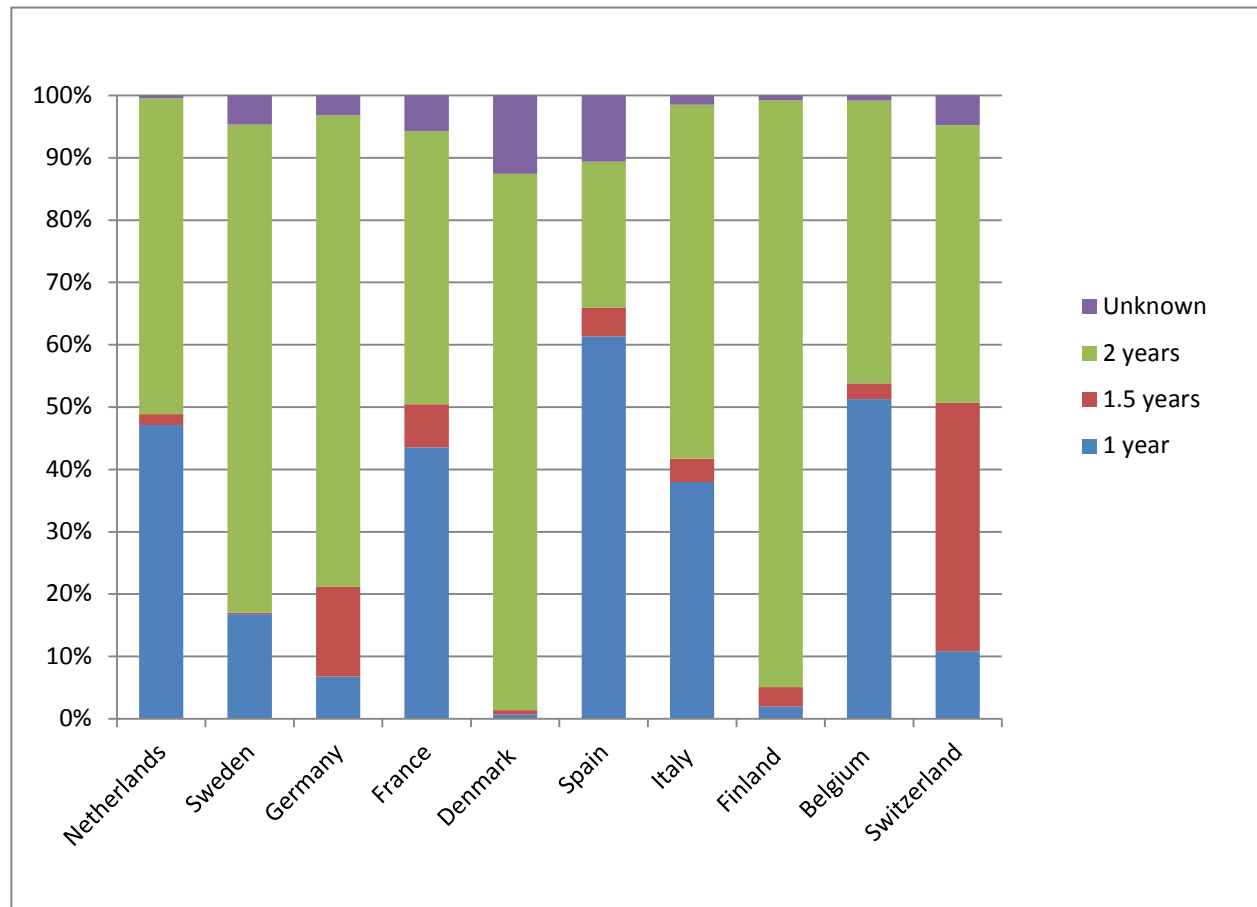
Figure 3: Average Number of English-Taught Programs per Institution Listed on MastersPortal.eu



Duration and Types of English-Taught Programs

Figure 4 shows the duration of English-taught programs in June 2013. The biggest change since our last report has been the increase in two-year master's programs and the decrease in one-year master's programs. Two-year English-taught degree offerings became more common in the Netherlands, Sweden, Germany, France, Spain, Italy, Finland, Belgium and Switzerland, while one-year English-taught degree offerings declined in the Netherlands, Germany, Denmark, Spain, Italy, Belgium and Switzerland.

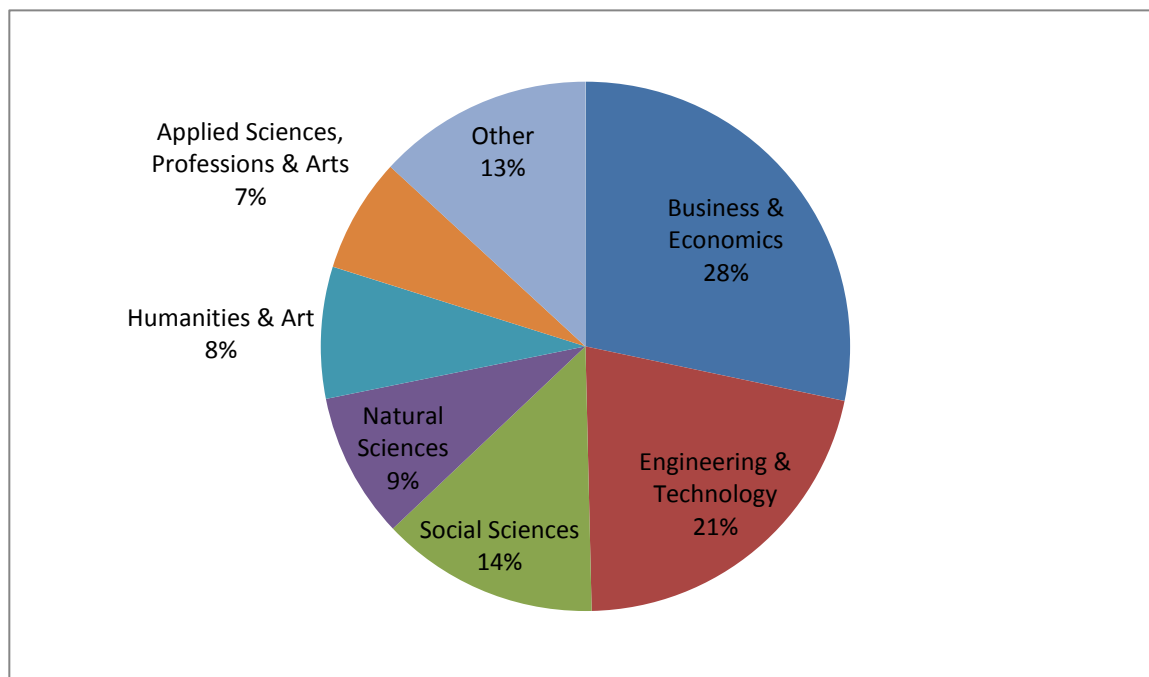
Figure 4: Duration of English-Taught Programs in Selected Countries, June 2013



Surveying the Field: What Institutions Are Offering

Since 2011, the representation of disciplines within the English-taught master's program listings has remained fairly constant, even as the total number of programs has increased. Figure 5 shows the distribution of disciplines in June 2013. The most popular fields are still business and economics (28 percent) and engineering and technology (21 percent). Together, these disciplines are represented in 3,282 programs, a figure that has increased 44 percent since 2011. As in 2011, the third most popular discipline is social sciences (14 percent), followed by natural sciences (9 percent), humanities and art (8 percent), applied sciences (7 percent), and professions and arts (7 percent).

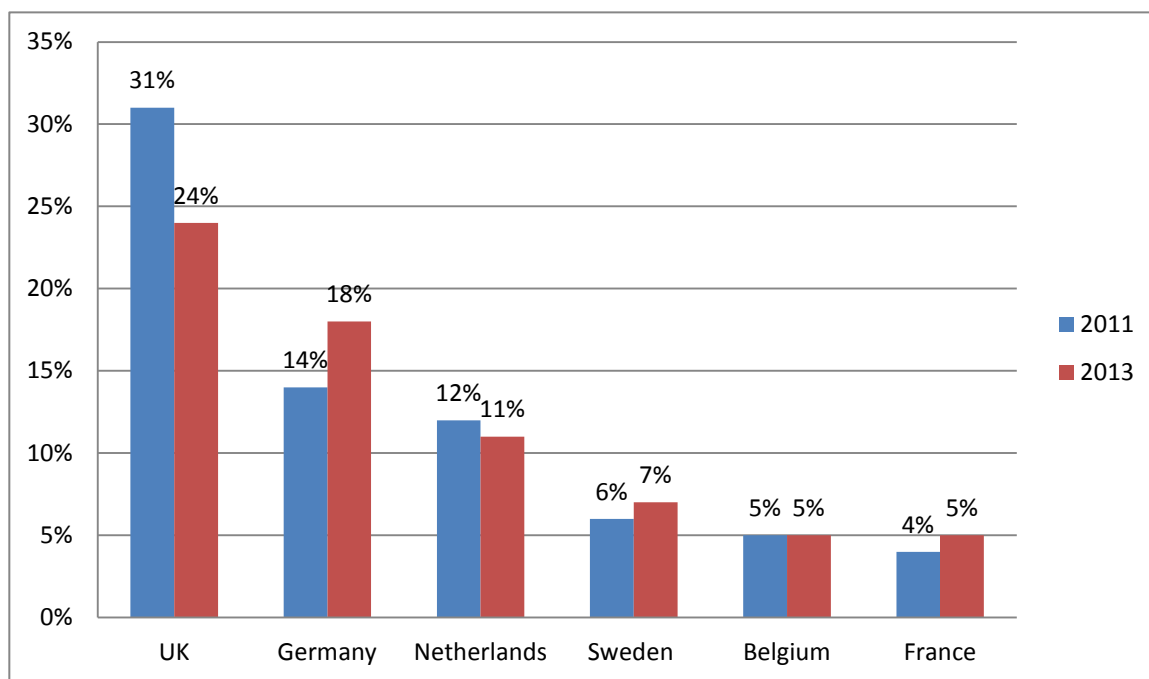
Figure 5: Disciplines of English-Taught Master's Programs, June 2013



Growing Student Interest in Continental Europe

Since 2011, patterns of site traffic on StudyPortals.eu suggest that a geographical shift in student interest may be underway. The data show a lower percentage of all pageviews for UK programs, and more pageviews for programs in the rest of Europe. Programs in the United Kingdom received 31 percent of total pageviews in 2011, but only 24 percent of total pageviews in 2013. Meanwhile, Germany has increased its share of total pageviews from 14 percent to 18 percent. While these numbers are influenced by many factors, they suggest greater student interest in programs in continental Europe. The increase in English-taught master's programs is likely an important factor driving this trend.

Figure 6: Most Popular Host Countries by % of Total Views



Conclusion

From 2011 to 2013, continental Europe experienced a rapid increase in English-taught master's programs. It is not clear whether there is still room for growth or whether, as we have seen in some countries such as Germany, the number of programs will begin to level off. In certain fields, such as engineering and technology, high student interest indicates that there may still be opportunities for growth and new program development. Of course, many external economic and demographic factors will continue to influence demand, as well. Our data sources do not reveal how many students actually take part in each program, but this would be an interesting direction for future research. Since so many programs have been launched in such a short time period, it is difficult to know how many of them will be sustainable. We hope to continue monitoring these trends in the coming years.

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