

The changing landscape of English-taught programmes

2021



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1. Introduction

The internationalisation of higher education is accelerating faster than ever. Never have so many students studied abroad, and never before have so many universities been keen to recruit the best talent globally. The number of students enrolled on a course outside their home country has increased from 3.8 million in 2010 to 5.6 million in 2018 and is growing steadily on average by 4.8% per year¹. While the Covid-19 pandemic is likely to temporarily slow the growth numbers for the current academic year, the effect is expected to be temporary.

A major driver of internationalisation has been the increasing offer of English-taught programmes (ETPs). Once the unique value proposition of the Big Four study destinations (United Kingdom, United States, Australia and Canada), English-taught programmes are now widely available in locations from Europe to Asia, South America, and Africa.

In 2001, findings from a study identified 725 English-taught Master's in Europe, a number which soon rose to 2,389 in 2007 and 8,089 in 2014²³. In 2017, the first research on the growth of English-taught Bachelor's in Europe identified an additional 3,000 programmes at the undergraduate level taught in English within the EHEA area⁴. To date, however, no study offers a full overview of the growth of English-

taught programmes outside the United Kingdom, United States, Australia, or Canada. This report sets to illuminate how the international education landscape is changing and how it is influencing study choice.

The report covers English-taught full degree programmes at the Bachelor's and Master's level across non-anglophone countries. The main data source is represented by Studyportals' database of over 207,000 English-taught programmes globally across over 3,750 higher education institutions (HEIs).

From key destinations increasing their offer of English-taught programmes, to regional differences across continents and regions, discipline breakdowns, study methods, formats, differences in English language requirements and deep-dives into specific destinations, this report sets to explore a wide-range of topics to help navigate and better understand developments in international education over the past number of years.

One thing is sure: English as a medium of instruction is here to stay, and it has a profound impact on the shape of international education.

¹ OECD (2021). Education at a Glance 2020: OECD Indicators. Retrieved 21 June 2021 from https://www.oecd-ilibrary.org/sites/69096873-en/1/3/3/6/index.html?itemId=/content/publication/69096873-en&_csp_=b68ed930151b9d0f354aa48ee27178db&itemlGO=oecd&itemContentType=book

² Maiworm, F. & Wächter, B. (eds.) (2002). English-Language-Taught Degree Programmes in European Higher Education: Trends and Success Factors. ACA Papers on International Cooperation in Education. Bonn: Lemmens.

³ Maiworm, F. & Wächter, B. (eds.) (2014). English-Taught Programmes in European Higher Education: The State of Play in 2014. ACA Papers on International Cooperation in Education. Bonn: Lemmens.

⁴ Sändström, A. & Neghina, C. (eds.) (2017). English-Taught Bachelor's Programmes: Internationalising European Higher Education. EAIE Association for International Education (EAIE). Amsterdam.

2. English and international education

The importance of English

English as a medium of instruction has been key to the growth of international education⁵, which in turn has led to major political, economic, and cultural implications. The preference for English as a medium of instruction was in part driven by the increased globalisation brought along by multinational companies where English became the official working language⁶. This in turn increased student demands on universities for equipping them for a global labour market, with a specific focus on English language skills, as well as the need for intercultural skills and competencies. Furthermore, in time English also became the preferred language for scientific research and academic publications⁷ placing more pressure on teachers and professors to improve their English proficiency.

English-taught programmes include two major categories of study options. The first encompasses programmes offered by universities in anglophone countries, where most of the population speaks English and so English is the default instruction language in tertiary education. The Anglosphere includes countries such as the United States, the United Kingdom, Canada, Australia, Ireland, and New Zealand. These are also the countries that traditionally have had the largest shares of

international students, as a large proportion of HEIs in the countries are accessible to international students.

The second category of English-taught programmes is that of “English Medium Instruction” (EMI), which refers to “the use of English language to teach academic subjects in countries or jurisdictions where the first language (L1) of the majority of the population is not English”⁸. Across OECD countries, in 2015 the following locations had the largest numbers of international students: France, Germany, Japan, Italy, the Netherlands, Spain, Turkey, Austria, Belgium, Korea, Switzerland, Poland, Czech Republic, Denmark, Sweden, Finland, Hungary, Portugal, Slovak Republic, Mexico, Norway and so forth. While French, German and Spanish are also medium instruction languages in certain countries, most of the student mobility is now being driven by English as a medium of instruction. In 2016, Studyportals identified 8,000 courses taught in English at universities in non-anglophone countries around the world among the top universities.

Findings from a Studyportals collaborative study with the Academic Cooperation Association (ACA) identified 725 English-taught Master’s in continental

⁵ Rigg, P. (2013). English as the lingua franca of higher education? University World News, 22 November 2013, Retrievable at <http://www.universityworldnews.com/article.php?story=20131121152245865>

⁶ Neeley, T. (2012). Global Business Speaks English. Harvard Business Review, May 2012, Retrieved from <https://hbr.org/2012/05/global-business-speaks-english>

⁷ Huttner-Koros, A. (2015). The Hidden Bias of Science’s Universal Language. The Atlantic, August 21, 2015, retrieved from

<https://www.theatlantic.com/science/archive/2015/08/english-universal-language-science-research/400919/>

⁸ Dearden, J. (2014). English as a medium of instruction – a growing global phenomenon. British Council, retrieved from https://www.britishcouncil.org/sites/default/files/e484_emi_-_cover_option_3_final_web.pdf

Europe in 2001, a number which rose to 2,389 in 2007 and 8,089 in 2014⁹ in a similar collaborative research together with the Institute for International Education (IIE)¹⁰. In 2017, the first research on the growth of English-taught Bachelor's in Europe in collaboration with the European Association for International Education identified an additional 3,000 programmes at the undergraduate level taught in English within the EHEA area¹¹.

In 2021
Studyportals identified

27,874

English-taught programmes

Outside the Big Four
anglophone destinations

Within Asia-Pacific, there has been a recent explosion of demand throughout the region to raise English language competences and promote

internationalisation and international student recruitment targets¹². In 2017, foreign enrolments in China were up by 10.5%. India has also announced the intention to host 200,000 visiting students by 2023. These signals are pointing to a shift in Asian-Pacific countries transitioning from "sending" markets to "receiving" markets for international students.

The Big Four & impact of Covid-19

For several years, the Big Four anglophone countries have been the main study destinations, attracting nearly 38% of international students globally¹³.

With just over 1 million foreign students in 2018/19, the United States received the largest share of international students, yet its growth as a study destination had slowed significantly to just 0.05%¹⁴. The impact of Covid-19 on the United States as a destination is even more pronounced, with the US government reporting a decline of 18% in international student enrolments in 2020¹⁵.

Pre-pandemic, Australia was the second largest destination globally for international students, hosting 758,000 students in 2019, after an almost 10% growth compared to the previous year¹⁶. However, that number significantly dropped in 2020 with universities enrolling 210,000 fewer international

⁹ Maiworm, F. & Wächter, B. (eds.) (2014). English-Taught Programmes in European Higher Education: The State of Play in 2014. ACA Papers on International Cooperation in Education. Bonn: Lemmens.

¹⁰ Brenn-White, M. & Faethe, E. (2013). English-Taught Master's programmes in Europe: a 2013 update. Institute of International Education.

¹¹ Sändström, A. & Neghina, C. (eds.) (2017). English-Taught Bachelor's Programmes: Internationalising European Higher Education. EAIE Association for International Education (EAIE). Amsterdam.

¹² Walkinshaw, I., Fenton-Smith, B. & Humphreys, P. (2017). English Medium Instruction in Higher Education in Asia-Pacific, Multilingual Education 21, DOI 10.1007/978-3-319-51976-0_1

¹³ UNESCO UIS (2021), Inbound internationally mobile students by country of origin. Retrieved 4 May 2021 from <http://data.uis.unesco.org/>

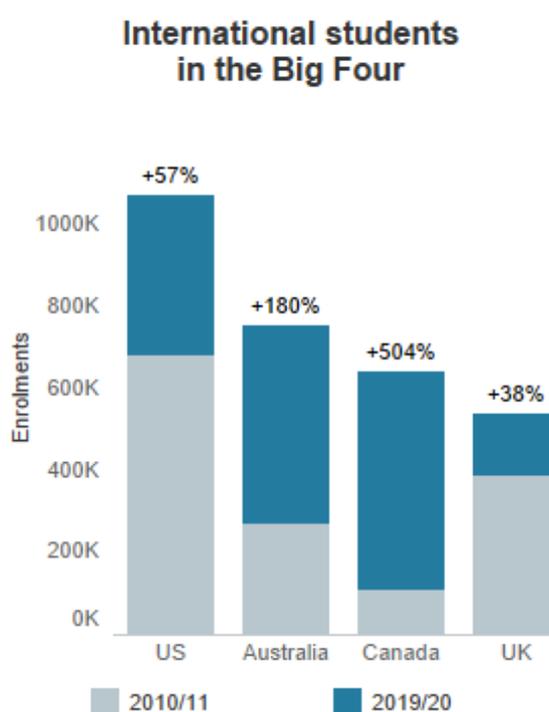
¹⁴ IIE (2019). Number of international students in the United States hits all-time high. Retrieved 21 June 2021 from <https://www.iie.org/Why-IIE/Announcements/2019/11/Number-of-International-Students-in-the-United-States-Hits-All-Time-High>

¹⁵ U.S. Immigration and Customs Enforcement (2020). Sevis by the numbers: Annual report on international student trends. Retrieved 21 June 2021 from <https://www.ice.gov/doclib/sevis/pdf/sevisBTN2020.pdf>

¹⁶ ICEF Monitor (2020). Australia's foreign enrolment up 10% in 2019. Retrieved 21 June 2021 from <https://monitor.icef.com/2020/02/australias-foreign-enrolment-up-10-in-2019/>

students than expected in 2020¹⁷. With border closings expected to continue until mid-2022, the numbers are likely to continue decreasing.

Figure 1. Number of international students enrolled in the Big Four countries



Sources UNESCO, HESA, IIE, Austrade, CBIE

The United Kingdom hosted 556,000 international students in 2019/20 and is preparing for a challenging enrolment year in lieu of Brexit's impact on European student recruitment. The full impact of these two factors will be known shortly, with some

¹⁷ ICEF Monitor (2021). Australia: large-scale return of international students not expected until 2022. Retrieved 21 June 2021 from <https://monitor.icef.com/2021/05/australia-large-scale-return-of-international-students-not-expected-until-2022/>

¹⁸ Conlon, G., Lader R., Halterbeck, M. & Hedges, S. (2021). EU exit: estimating the impact on UK higher education. Retrieved 21 June 2021 from https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/958998/EU_exit_estimating_the_impact_on_UK_higher_education.pdf

government bodies projecting a decline of 57% of first-year EU students for 2021/22¹⁸.

Canada had the fewest international students in 2018 among the Big Four countries, but was among the fastest growing destinations, with 642,000 international students in 2019¹⁹. The effect of the pandemic saw international student numbers decline to 530,000 at the end of 2020²⁰.

Global competition

As English becomes more commonly used as a language of instruction, the competition for non-anglophone study destinations increases.

European landscape

The offer of English-taught programmes within Europe is continuously growing following the introduction of the Bologna process.

Aside from anglophone countries, universities in the Netherlands, Germany, and France lead this trend within Europe. While originally the internationalisation strategy of European HEIs focused on postgraduate programmes, more programmes are now being offered at undergraduate level, with a recent study identifying 3,000 undergraduate programmes within the European Higher Education Area²¹.

¹⁹ Canadian Bureau for International Education (2020). International students in Canada continue to grow in 2019. Retrieved 21 June 2021 from <https://cbie.ca/international-students-in-canada-continue-to-grow-in-2019/>

²⁰ ICEF Monitor (2021). Canada's foreign enrolment fell nearly 17% in 2020. Retrieved 21 June 2021 from <https://monitor.icef.com/2021/03/canadas-foreign-enrolment-fell-nearly-20-in-2020/>

²¹ Sändström, A. & Neghina, C. (eds.) (2017). English-Taught Bachelor's Programmes: Internationalising European Higher Education. EAIE Association for International Education (EAIE). Amsterdam.

The Netherlands was at the forefront of these developments, having grown its international student numbers to 94,000 in 2019/20²².

The increasing German competition for anglophone educational options is primarily driven by free education provision in public universities and colleges, which is also available for international candidates. In 2013, there were 197,000 international students in Germany; by 2019/20, this number grew to 320,000²³. Similarly, as we have seen in other European countries, English-taught programmes have become more appealing for both the international student audience who could previously only study in German, as well as to domestic students.

The Netherlands and Germany are not the only countries recruiting internationally though, and internationalisation seems to be the highest priority for HEIs across Europe, from Benelux, Southern Europe, Baltics, Scandinavia and more recently Central and Eastern Europe.

Asian ambitions

A key development in terms of English-taught education globally has been the ambition of Asian HEIs to recruit internationally, which often means introducing English-taught programmes.

China has strong international education ambitions, developing its higher education system to improve in global rankings, provide scholarships for prospective students, create global partnerships and recruit internationally. Pre-pandemic, China's aim was to recruit 500,000 international students by 2020, having reached 492,000 in 2019²⁴.

In addition to China, the biggest countries in Asia in terms of the number of hosted international students include Japan, Malaysia, South Korea, and Taiwan.

HEIs in the Middle East have also shown strong interest in offering English-taught programmes, some in collaboration with UK HEIs or in the form of transnational education.

One hypothesis emerging after the pandemic is that students might prefer destinations closer to home, and since most international students currently originate from Asia it is expected that Asian destinations will benefit from the pandemic in terms of global recruitment.

Students have never had more options to study abroad in English, and while the pandemic has slightly dampened these ambitions, students' interests to study across borders is likely to continue to grow.

²² Nuffic (2020). How is COVID-19 affecting international students' plans to study in the Netherlands? Retrieved 21 June 2021 from <https://www.nuffic.nl/sites/default/files/2020-08/how-is-covid-19-affecting-international-students-plans-to-study-in-the-netherlands.pdf>

²³ ICEF Monitor (2020). Germany's foreign enrolment grew again in 2019/20. Retrieved 21 June 2021 from

<https://monitor.icef.com/2020/12/germanys-foreign-enrolment-grew-again-in-2019-20/>

²⁴ ICEF Monitor (2019). China's foreign enrolment growth flattened out in 2018. Retrieved 21 June 2021 from <https://monitor.icef.com/2019/04/chinas-foreign-enrolment-growth-flattened-out-in-2018/>

3. Methods

Data Sources

The research will be based on Studyportals data of 207,000 programme listings in English that can be segmented by a multitude of programme and organisation characteristics such as destination country, discipline, programme title, tuition fee, degree level, delivery mode, etc. The strength of this dataset comes from two main characteristics: first, the dataset is comprehensive of unique, proprietary data collected over more than ten years of company operations; second, the dataset is organised in a reliable structure that allows detailed access to information. Studyportals' data team has developed its capabilities around the large amount of information stored in its database. The database is proprietary and contains detailed information on programmes offered in the English language all around the world, as well as on the institutions providing these programmes. The core criteria for data quality involves the completeness of information and aims to include all relevant information on stored entries. This proprietary dataset has been built around individual programmes and therefore offers a finer level of detail compared to alternative listings of education providers. Studyportals collected data on single programmes, and defined for each of them multiple criteria, covering duration (measured both in months and in expected ECTS credits), tuition fees, entry requirements, and delivery method (usually codified as on-campus, online delivery, or blended learning). In addition to the details of each individual programme, Studyportals has organised information on programme providers as well. Higher education institutions are mapped and identified with information on the organisation and the venues where the courses are offered.

Data quality

This database is being constantly updated by a data insertion team that validates and corrects programme entries, as well as by the universities themselves, that have access to their programme listings and content. In addition, each of the 50 million portal users can flag inaccurate or incomplete data on the platforms. This considerable amount of work keeps Studyportals' listings up to date and matches the most recent trends in supply for higher education.

The dataset is monitored through a Data Quality Score that takes into consideration several different indicators, mostly related to the completeness of information available on the portals. The score takes into consideration all programmes listed on all portals, for over 207,000 programmes available on the four Studyportals-operated websites with study information.

As of June 2021, the Data Quality Score totalled 97.02 out of 100 possible points.

The Data Quality Score is measured monthly and considers the completeness of each entry. Each programme is considered of good quality when the information about it is complete and up to date. The Data Quality Score involves all parts of the information set presented to students including links to the programme website; tuition fees; duration of the programme; application deadlines; start date of the programme; entry requirements; programme summary; description; programme outline (content); credits awarded.

Methodology constraints

Studyportals will have done their utmost to keep our database on academic offers complete and up to date, however, since we rely on rankings, institutions' websites and self-reported data by these institutions, in some cases this data might be incomplete or outdated. Studyportals will have done their utmost to register information in the most accurate and representative way. Studyportals cannot guarantee nor accept liability for the accuracy of any of the data provided. Studyportals has a primary focus on comprehensiveness among institutions with at least 50 international students per academic year, which influences coverage in countries that although might teach in English have a solely domestic focus (e.g. not all institutions in India, South Africa or the United States have an international recruitment focus).

Covid-19 limitations

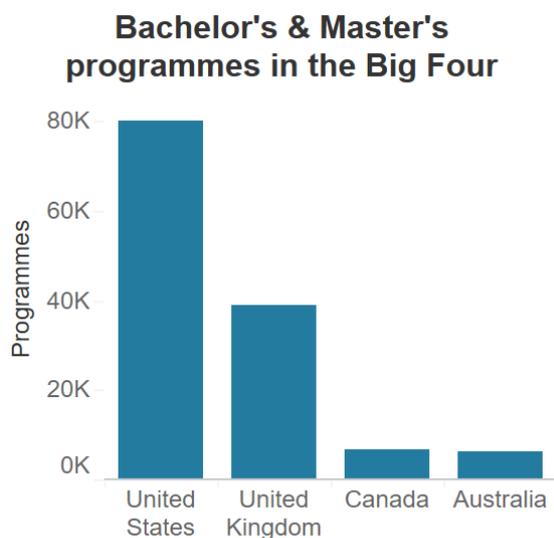
Programmes on Studyportals represent degrees – the proof of education pursued by students. This means that in the case of a programme temporarily offered online, such a programme will still be considered as delivered on-campus. Similarly, in the case where the delivery of a programme is unbundled from the premises of the awarding body (e.g., flying faculty agreements) these programmes are represented by their parent awarding body rather than by the single premises where these blended courses take place. Such choices lead to a correct representation of degrees taught and awarded on the premises; at the same time, these choices lead to an under-representation of cases – especially in local study centres and in executive education – where partnerships are established. A disclaimer is due for hubs where proper campuses abroad are not always present, but education is delivered through blended learning in local sites (e.g., Hong Kong; Dubai; Abu-Dhabi; etc.).

4. International Landscape

Growth over time

Studyportals mapped 157,278 Bachelor's and Master's programmes worldwide, 81.7% of which are offered by the Big Four anglophone destinations. While this number is high, it does now show that almost one-in-five ETPs are offered outside the Big Four; such a category remains too big to be ignored and is worth understanding the changing landscape of ETPs by region.

Figure 2. Number of English-taught programmes (ETPs) in key study destinations vs rest of the world



In May 2021, Studyportals identified 27,874 programmes outside the Big Four. This represents a growth of 77% compared to just January 2017, showing that more and more HEIs are boosting their internationalisation strategies with programmes taught in English.

While most ETPs outside the Big Four are still offered at the Master's level, the number of undergraduate ETPs is growing at a faster rate (85% compared to 74%).

Among the fastest growing disciplines, ETPs are increasingly being offered within Medicine & Health – which includes fields such as Health Sciences, Human Medicine, or Public Health – more than doubling (126% growth), as well as Education & Training (114%) which is more focused on Teaching, together with Applied Sciences & Professions (103%), Natural Sciences & Mathematics (96%) with fields such as Mathematics, Biochemistry, Bioinformatics, Physics or Genetics, and Computer Science and IT (95%) where most programmes are offered in Computer Science, Data Science & Big Data, Informatics & Information Sciences, as well as Software Engineering.

The world ahead

The historic growth of English-taught programmes outside the Big Four in the past five years has been largely a European affair. As countries in Western Europe reassess their internationalisation objectives focusing less on attracting larger numbers and more on providing academic excellence, the growth of ETPs is likely to slow down.

However, while Master's programmes in Europe appear to have reached their relative zenith, other trends will charge the growth of ETPs worldwide. Firstly, Bachelor's programmes have risen more rapidly than their Postgraduate counterparts: this growth is likely to accelerate, analytics predict.

More interestingly, data suggests that much of the growth of ETPs worldwide will materialise in Asia, in particular in the Chinese Region – bound to overtake Europe in overall size by the end of the 20s – and in East Asia.

Figure 3: Projected growth of English-taught programmes

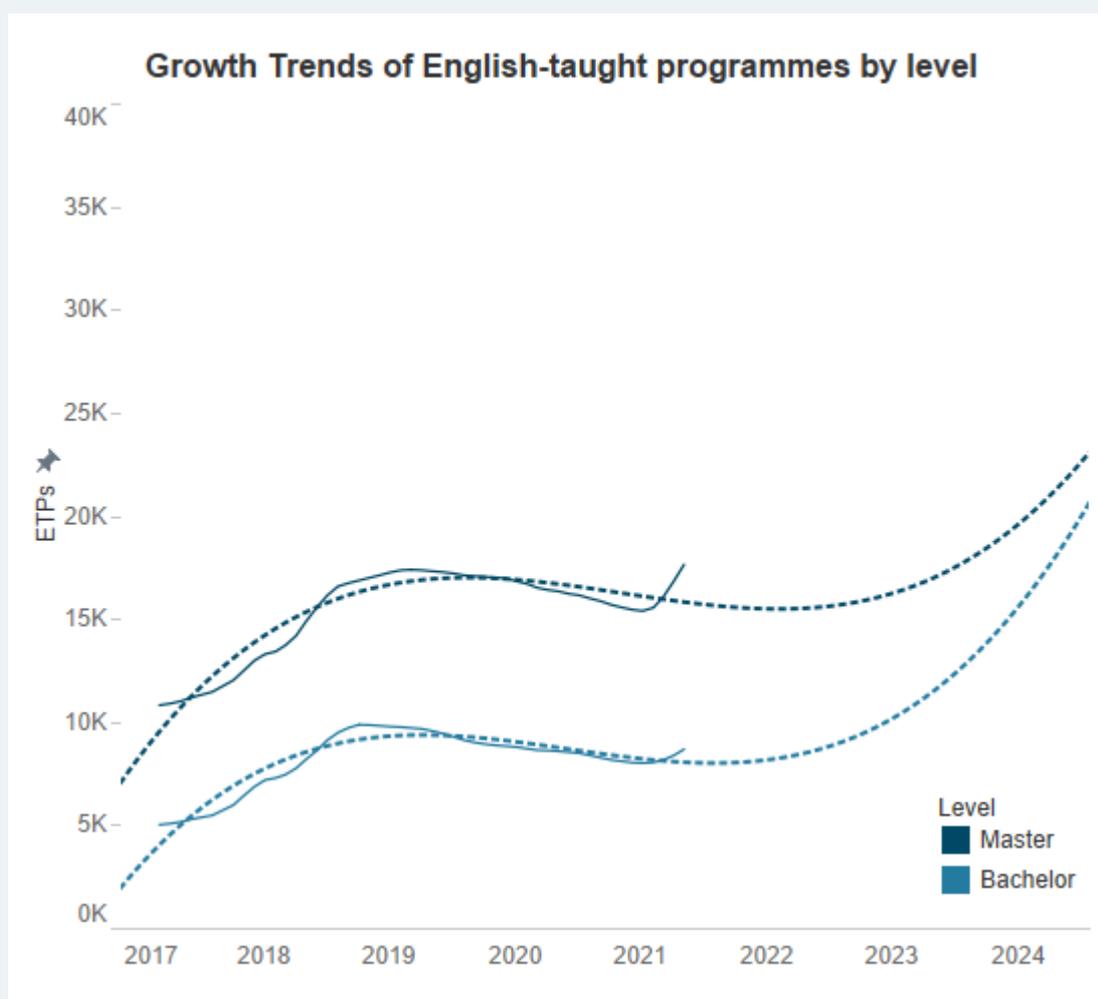


Figure 4: Change of ETPs outside the Big Four Destinations

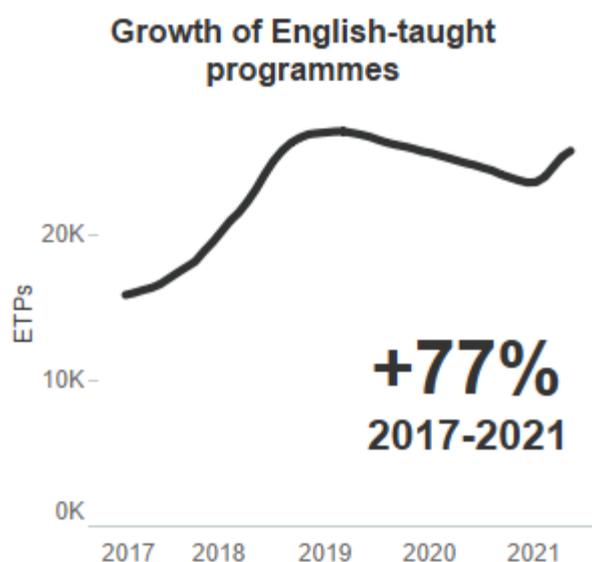


Figure 5: Change of ETPs outside the Big Four across study levels

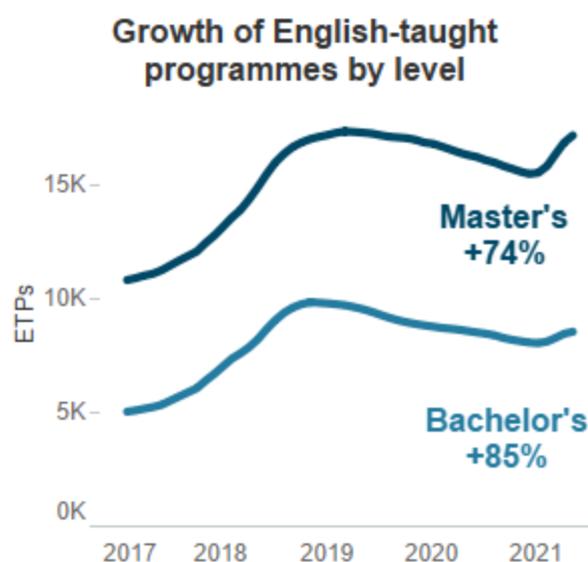


Table 1: Growth by disciplines - Bachelor's programmes 2017-2021

Between 2017 and 2021 4,227 ETPs were added at a Bachelor's level outside the Big Four	Education & Training	155%
	Applied Sciences & Professions	123%
	Law	123%
	Natural Sciences & Mathematics	117%
	Computer Science & IT	117%
	Environmental Studies & Earth Sciences	114%
	Medicine & Health	106%
	Agriculture & Forestry	101%
	Arts, Design & Architecture	100%
	Engineering & Technology	94%
	Journalism & Media	86%
	Business & Management	86%
	Average Bachelor's	85%
	Social Sciences	76%
	Hospitality, Leisure & Sports	74%
	Humanities	68%

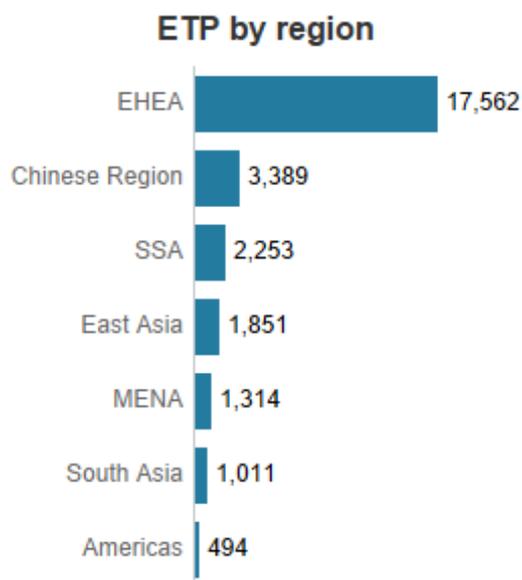
Table 2: Growth by disciplines - Master's programmes 2017-2021

Between 2017 and 2021 7,905 ETPs were added at a Master's level outside the Big Four	Medicine & Health	135%
	Education & Training	97%
	Engineering & Technology	94%
	Applied Sciences & Professions	94%
	Natural Sciences & Mathematics	89%
	Computer Science & IT	84%
	Arts, Design & Architecture	81%
	Hospitality, Leisure & Sports	78%
	Journalism & Media	77%
	Average Master's	74%
	Business & Management	69%
	Environmental Studies & Earth Sciences	68%
	Law	66%
	Humanities	65%
	Agriculture & Forestry	61%
	Social Sciences	47%

Regional differences

Of the 27,874 ETP programmes outside the Big Four, the vast majority are offered within the EHEA region (63.0%), followed by Chinese region (12.2%), Sub-Saharan Africa (SSA) (8.1%) and East Asia (6.7%). The Middle East and North Africa (MENA), South Asia and Americas regions offer a relatively lower number of ETPs (4.7%, 3.6% and 1.8% respectively).

Figure 6: ETPs per region



Within EHEA, a few countries stand out in terms of their ETP offer: Ireland, the Netherlands and

Germany are at the forefront of the internationalisation process within EHEA.

Some countries such as Turkey, Sweden, Spain, Italy, and France also have a significant offer, where others offer fewer programmes and are just beginning to introduce ETPs.

Outside of EHEA, Chinese universities appear particularly strong in the number of ETPs, helped partly by their continuous ascent in university rankings²⁵.

In Sub-Saharan Africa the number of HEIs teaching in English remains limited, but large South-African universities have extensive programme portfolios that cater both to the needs of domestic students and students from (mainly) other African countries²⁶.

Among other markets for ETPs, both East Asia and the Arab countries in the Middle East and Northern Africa act as powerful regional hubs. In the former, Malaysia offers the majority of ETPs delivered by universities while in the latter, the United Arab Emirates acts as a main player alongside other Gulf countries.

South Asia and Latin America are at early stages of offering ETPs. Even as India sets goals for becoming an educational hub²⁷, only a small portion of its universities are open to international degree seekers²⁸.

²⁵ Linney, Sarah. The Rise of Chinese Higher Education Institutions in Global Rankings. QS. (2019, November 28). <https://www.qs.com/rise-chinese-higher-education-institutions-global-rankings/>.

²⁶ South Africa remains an important regional hub for education. ICEF Monitor - Market intelligence for international student recruitment. (2020, October 21). <https://monitor.icef.com/2017/03/south-africa-remains-important-regional-hub-education/>.

²⁷ India set on becoming a major regional study destination. ICEF Monitor - Market intelligence for international student recruitment. (2020, February 20). <https://monitor.icef.com/2018/04/india-set-becoming-major-regional-study-destination/>.

²⁸ International student numbers rise is fraction of goal. University World News. (n.d.). <https://www.universityworldnews.com/post.php?story=2019092708443536>.

Table 3: Institutions and programmes by main countries (May 2021)

	Destinations	Institutions	Programmes
Big Four	United States	1,252	76,112
	United Kingdom	227	35,208
	Australia & NZ	67	7,024
	Canada	84	6,316
EHEA	Ireland	33	2,776
	Netherlands	54	1,937
	Germany	186	1,826
	France	151	1,035
	Spain	77	995
	Sweden	33	952
	Turkey	30	941
	Other EHEA	574	7,100
Chinese Region	China	133	2,481
	Hong Kong & Macao	13	763
	Taiwan	24	145
SSA	South Africa	12	1,963
	Namibia	2	137
	Kenya	1	73
	Other SSA	11	80
East Asia	Malaysia	15	848
	Singapore	7	272
	Japan	24	187
	Other East Asia	23	544
MENA	United Arab Emirates	23	509
	Palestine	2	185
	Northern Cyprus	4	161
	Egypt	2	106
	Israel	8	103
	Other MENA	10	250
South Asia	India	15	555
	Pakistan	5	290
	Other South Asia	6	166
Americas	Jamaica	3	298
	Trinidad and Tobago	2	36
	Colombia	1	35
	Other Americas	27	125

In the EHEA, the differences among destinations are mostly found in Western Europe. Here the top destinations in 2017 added even more programmes to their ETP offers: Ireland maintained its top spot thanks to a large increase in supply, while the Netherlands reached 1,900 programmes (more than Ireland offered in 2017). Germany is a close third with approximately 1,800 ETPs. Modest yet significant changes materialised for France and Spain, topping Sweden in overall number of ETPs.

Other countries in the EHEA appear to be reaching their potential in offering ETPs, particularly Finland (where tuition fees for non-nationals were introduced in late 2016), Portugal and Cyprus.

Growth in Europe

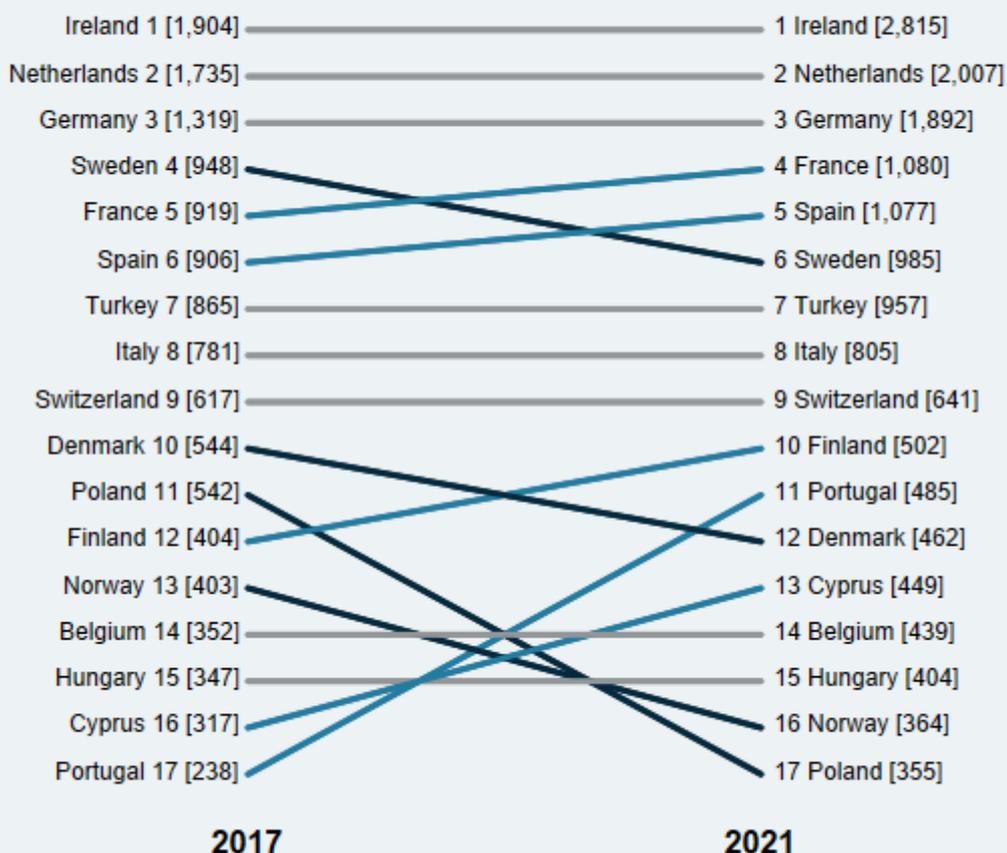
The EHEA hosts some of the largest providers of English-taught programmes worldwide. Ireland, the Netherlands, and Germany sit steadily on top the list of overall supply of programmes. Some of the largest growth comes from Ireland and Germany increasing their supply by more than 40%. The Netherlands, France, Spain, and Turkey also grew, albeit by less than 20% from 2017 (average) to 2021 (average).

Among the fastest growers were Portugal, Cyprus, Finland, and Belgium, all of which are not in the top-10 by sheer size of programmes.

Unsurprisingly, the slowest growth rates came from the Nordics, where Swedish programmes only grew by 4%, and Denmark and Norway ultimately decreased the extent of their English-taught portfolios.

Figure 7: Countries by number of ETP and university size (2017 average – 2021 average)

Top-15 destinations in the EHEA by number of programmes



HEI breakdown

The number of ETPs is also strongly influenced by the number of HEIs within a country, and the share of these HEIs teaching in English.

For many institutions offering ETPs outside of anglophone countries, these programmes are run alongside programmes in other languages, and therefore do not make up the bulk of the study offer. There are of course exceptions to these rules.

A general finding is that most HEIs are only offering a small number of ETPs, thus fitting with internationalisation-at-home strategies, in support of a programme portfolio still delivered in their traditional language of teaching.

Table 4: ETP Programmes and HEIs per region

	Institutions	Programmes	Programmes per institution
Total	1,511	27,874	19
EHEA	1,138	17,562	15
Chinese Region	170	3,389	20
SSA	26	2,253	87
East Asia	69	1,851	27
MENA	49	1,314	27
South Asia	26	1,011	39
Americas	33	494	15

Table 5: Distribution of institutions by regions

Institutions by ETP portfolio size

	Less than 10 programmes	<20 ETPs	<30 ETPs	<40 ETPs	<50 ETPs	50-100 ETPs	More than 100 programmes
Americas (33)	64%	18%	6%	3%	6%	0%	3%
EHEA (1,138)	61%	19%	7%	4%	3%	4%	3%
East Asia (69)	54%	16%	7%	0%	0%	17%	6%
Chinese Region (170)	46%	24%	12%	4%	3%	10%	2%
SSA (26)	38%	15%	8%	0%	8%	12%	19%
MENA (49)	31%	27%	12%	10%	2%	14%	4%
South Asia (26)	31%	12%	8%	15%	12%	15%	8%
Big Four (1,630)	23%	8%	6%	9%	8%	21%	26%

The overview of a region fails to capture the complexity of English-taught higher education: within each group there are countries where regional trends are more pronounced, while others perform as outliers.

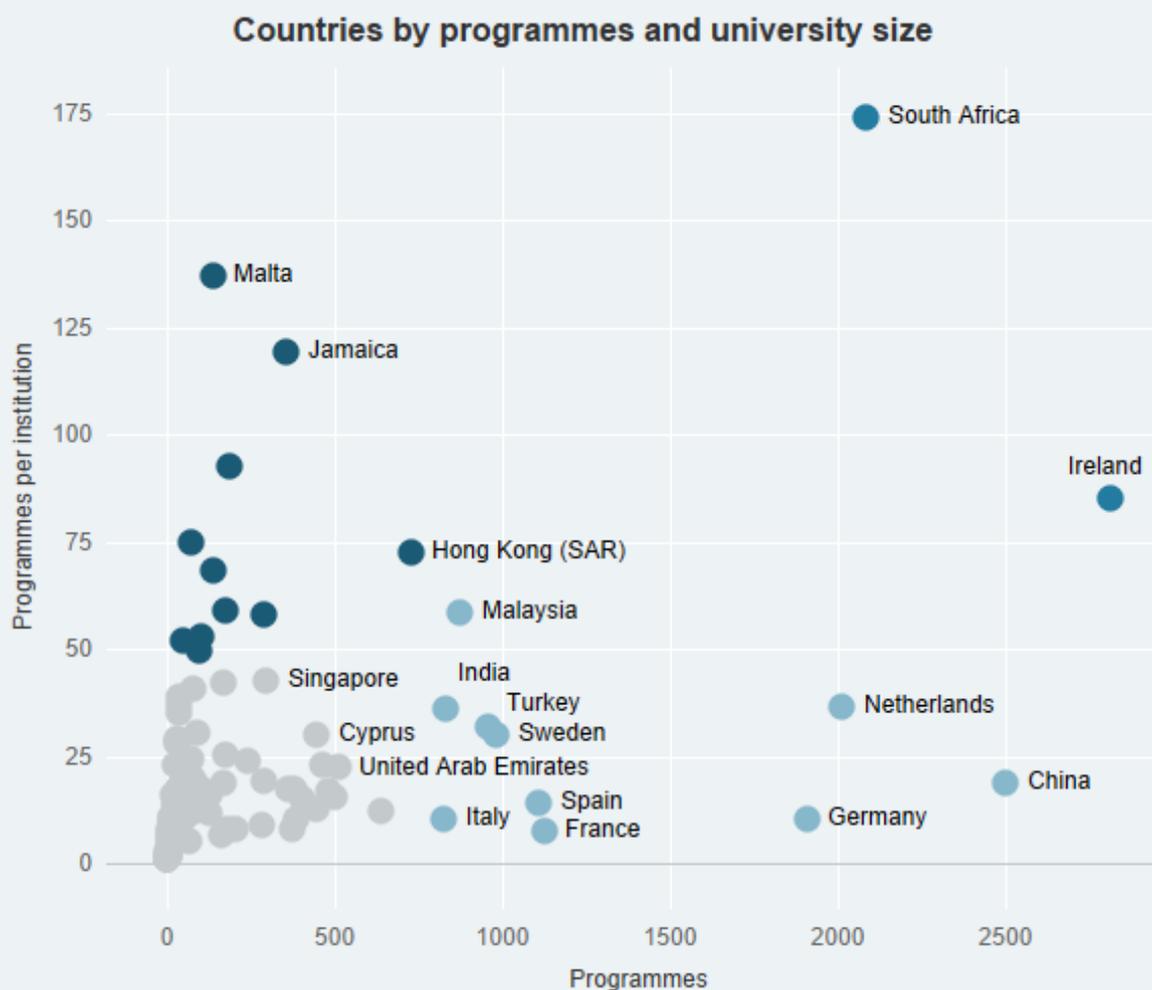
The forest for the trees

Grouping countries by area helps identifying differences and common points. However, a regional focus can also hide larger clusters worldwide, as shown below. Studyportals mapped countries by their overall offer, with Ireland unsurprisingly offering the largest number of ETPs.

A high-level analysis of clusters identifies some groups: the two large outliers in **blue** (South Africa and Ireland) have a tradition of teaching in English despite not being considered among the Big Four anglophone countries; or the **light blue** countries of the Netherlands, Germany, and China that have sizeable ETP portfolios spread over several institutions; or the **dark blue** cluster of highly concentrated programmes in just a handful of HEIs.

However, this high-level approach removes much of the nuance seen in the same groups. For example, among developing ETP education (in **grey**), Spain, France, Turkey, and Sweden are significantly more developed than Cyprus or Denmark. Even within more selective clusters there are outliers, such as Malaysia and Hong Kong, that appear well-developed in their ETP offering.

Figure 7: Countries by number of ETP and university size



As countries pursue internationalisation through different strategies, some are clearly more mature markets for ETPs.

To differentiate each market stage in higher education, Studyportals will take a closer look at certain proxy measures:

- Rankings
- Presence of Hubs
- Disciplines in the portfolio

Global rankings

Rankings are valuable both to prospective international students and to universities. They allow us to benchmark and differentiate HEIs based on their performance. While the criteria in the World University Ranking represent different aspects of the academic world, one of the most important is found in the university international dimension. Internationalisation is both a requisite for improving rankings positions and an outcome of being highly ranked and more visible to international students and professors.

Globally, for every non-ranked university offering ETPs, Studyportals found four ranked universities. The ratio of non-ranked to ranked HEIs is: 1 : 4.

Such finding spurs a two-fold explanation: firstly, ranked universities are more likely to offer ETPs than non-ranked; and secondly, ranked universities are more likely to actively try to attract international students, hence being recorded in the Studyportals' dataset.

Even more interestingly, the distribution of ETPs favours ranked and top-ranked universities.

For every programme offered at a non-ranked university, 6 are offered at ranked universities, and little more than one at top-ranked universities.

The ratio of programmes offered at non ranked universities to ranked universities is 1 : 6.

Table 6: Distribution of institutions by region

Institutions	Non-ranked	Ranked	Top-100
Americas	1	5	-
Chinese Region	1	3	0.3
East Asia	1	8	1
EHEA	1	5	0.4
MENA	1	3	-
South Asia	1	10	-
SSA	1	5	-
United Kingdom	1	18	2
United States	1	2	0.5
Australia & NZ	1	12	2
Canada	1	4	1

Table 7: Distribution of programmes by region

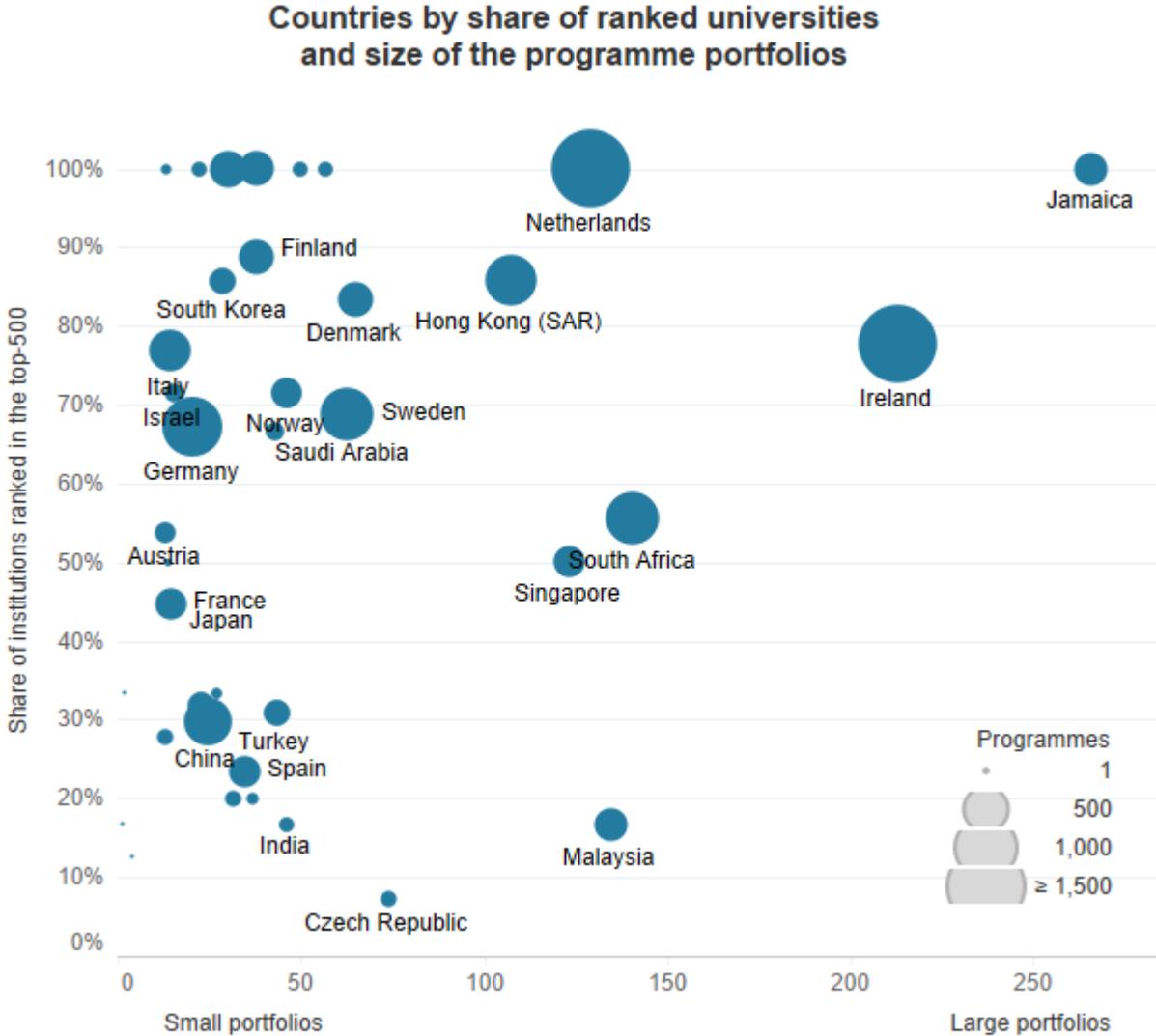
Programmes	Non-ranked	Ranked	Top-100
Americas	1	34	-
Chinese Region	1	4	1
East Asia	1	4	2
EHEA	1	9	2
MENA	1	7	-
South Asia	1	81	-
SSA	1	41	-
United Kingdom	1	53	9
United States	1	2	1
Australia & NZ	1	18	3
Canada	1	8	2

One consequence of such ratios is in the concentration of programmes by provider. Emerging from the ratios is an international landscape where it is much more common to find ETPs among ranked universities. One finding is that the more universities are accredited in the top-500, the larger their ETP portfolios.

Ranking and ETPs

Some countries have a large share of ranked universities combined with many programmes: the **Netherlands**, and **Hong Kong**, together with **Ireland**, **Jamaica** and **South Africa** top the list. However, looking at the total number of ETPs, **Germany** and **Sweden** are closer to the top group.

Figure 8: Size of ETP offering and position in THE WUR ranking (2021)



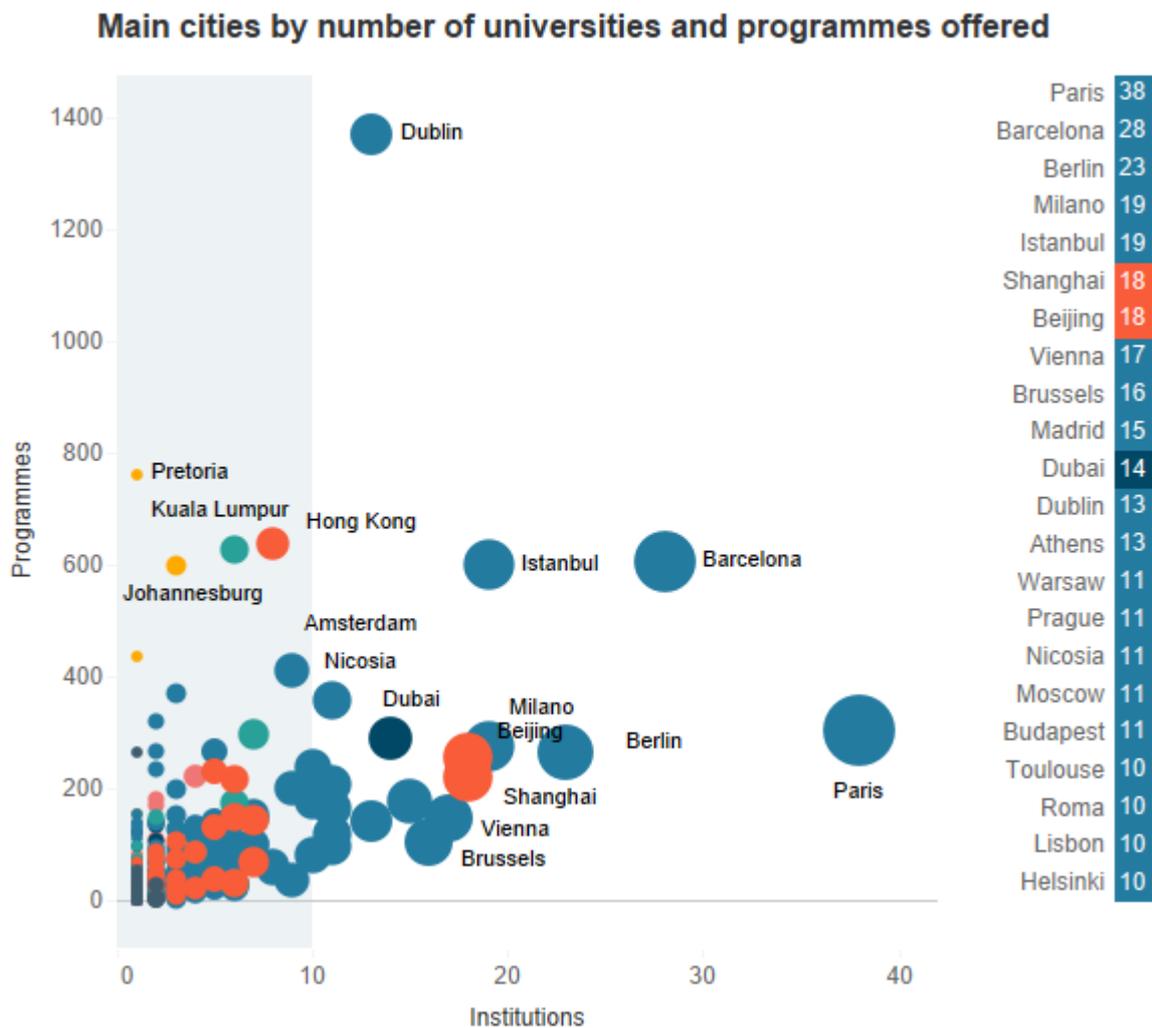
City hubs

Cities are pivotal in bringing together known academics, masses of students, and the reputable institutions connecting them. In defining a hub, Studyportals marked cities hosting at least 10 higher education providers. 19 of the 22 cities clearing the threshold are in the EHEA, confirming the important role covered by the region in the provision of ETPs; other cities exceeding 10 institutions are Beijing, Shanghai, and Dubai.

It is important to remember that the EHEA region includes all the signatory members of the Bologna process and stretches well beyond Western Europe: Istanbul and Moscow also emerge as important hubs for ETPs.

It is also worth taking into consideration the sheer number of programmes in display: Paris, Barcelona, Berlin, and Istanbul are by far the largest hubs in the region in terms of HEIs offering ETPs.

Figure 9: Major cities by number of HEIs offering ETPs



Discipline diversification

As universities undertake ambitious plans to raise their international standing, one main difference emerges from the Big Four countries: portfolio diversification.

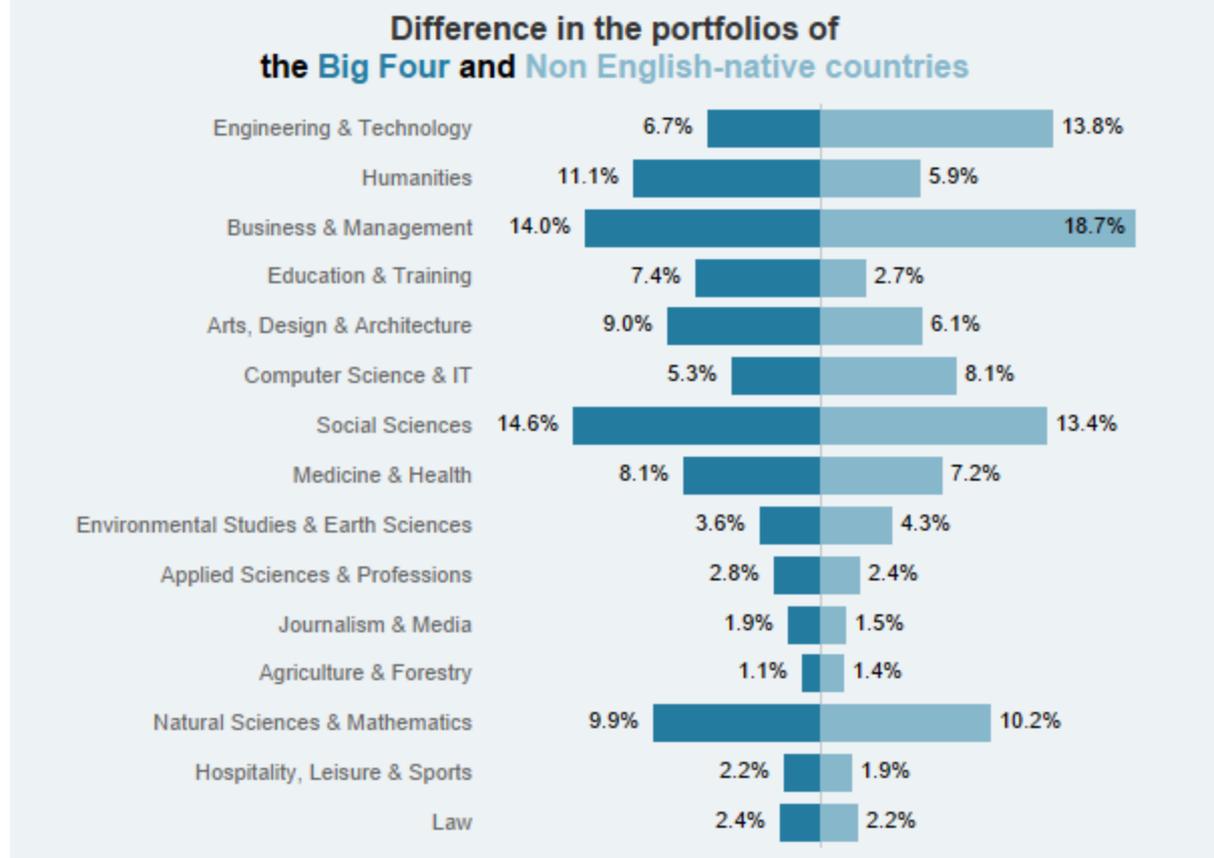
Traditionally, ETPs outside anglophone countries focused on programmes in International Business & Management, as well as Engineering & Technology. However, with time, we are noticing a diversification of the portfolio of ETPs in certain countries.

Well disciplined

It is not surprising that the discipline portfolio in the Big Four countries is diverse and includes all available subjects. In non-anglophone countries, however, deciding which programme will be delivered in English is often the outcome of a calculated effort.

Humanities and Education & Training are severely under-represented in non-English native countries, as these fields are often emphasise the domestic language of education to convey results and train experts. At the same time non-English native countries are focusing on ETPs in highly internationalised fields: Engineering & Technology, Business & Management, and Computer Sciences & IT make for more than 40% of all ETPs. The same subjects in the Big Four sum up to a meagre 25%.

Figure 10: Share of programmes per discipline



Differences by region may be pronounced and presenting a coherent picture of disciplines across markets is not an easy feat. For instance, a discipline like Computer Science & IT does not collect a large share of programmes in key anglophone destinations (varying from a low of 5% in the US and Canada to a high of about 6% in Australia and the UK). Such a discipline is more popular across non-English native countries (where it represents 8% of the programmes offered).

Table 8: Discipline distribution by region

Discipline		Non-anglophone countries (total)	Big Four	World
Main	Business & Management	19%	14%	15%
	Engineering & Technology	14%	7%	8%
	Social Sciences	13%	15%	14%
	Total	46%	35%	37%
Staple	Natural Sciences & Mathematics	10%	10%	10%
	Computer Science & IT	8%	5%	6%
	Medicine & Health	7%	8%	8%
	Total	26%	23%	24%
Market specific	Humanities	6%	11%	10%
	Arts, Design & Architecture	6%	9%	8%
	Environmental Studies & Earth Sciences	4%	4%	4%
	Education & Training	3%	7%	7%
	Total	19%	31%	29%
Marginal	Applied Sciences & Professions	2%	3%	3%
	Law	2%	2%	2%
	Hospitality, Leisure & Sports	2%	2%	2%
	Journalism & Media	2%	2%	2%
	Agriculture & Forestry	1%	1%	1%
	Total	9%	10%	10%
Grand total		1	1	1

Instead of focusing on differences, Studyportals tried to summarise what disciplines are most represented in the ETP landscape in non-anglophone regions by identifying disciplines in four categories:

1. Main disciplines are disciplines that make up the bulk of ETPs in non-English-speaking countries and represent programmes in Business & Management, Engineering & Technology, and Social Sciences. These amount to a staggering 46% of all programmes offered in non-English-native countries.

2. Staple disciplines are part of (almost) every country's ETP offer but are less common than programmes in the main disciplines. These include Natural Sciences & Mathematics, Computer Science & IT, and Medicine & Health. These are particularly pronounced in the Chinese and South Asian regions. Conversely, in EHEA they do not have a large following due to the region's lacklustre supply of English-taught Medicine & Health programmes.

3. Market specific disciplines constitute a group of mostly non-scientific disciplines whose weight varies region by region. These are disciplines that are normally offered in key anglophone countries but are not present in non-English speaking regions. A larger share of programmes captured by these disciplines makes regions like Ireland, SSA, and the Americas more akin to traditional destinations than to the EHEA.

4. Finally, marginal disciplines groups programmes that teach domain-specific knowledge and do not make up a large share of programmes in any specific market. Such disciplines are valuable as they cater to a niche of important, qualified professionals, but are rarely widespread across English-taught offers.

The main outcome of this analysis is a re-evaluation of the EHEA as a region. For some metrics, the region appears still very polarised, with most programmes in the main disciplines of Business & Management, Engineering & Technology, and Social Sciences. At the same time, however, it is far from differentiating its offer enough to be on-par with the key anglophone countries.

While the large majority of ETPs are offered in the EHEA, it emerges that the region shows characteristics that are very specific, and each market requires individual considerations.

Figure 11: Discipline distribution by market



Table 9: Discipline distribution by region

Discipline		Chinese Region	MENA	EHEA (without Ireland)	South Asia	East Asia	Americas	Ireland	SSA	Non-anglophone countries	Key anglophone countries	World
Main	Business & Management	18%	19%	21%	13%	16%	23%	16%	14%	19%	14%	15%
	Engineering & Technology	23%	20%	13%	18%	15%	4%	9%	9%	14%	7%	8%
	Social Sciences	10%	10%	15%	10%	12%	17%	13%	13%	13%	15%	14%
	Total	51%	49%	48%	41%	43%	44%	38%	35%	46%	35%	37%
Staples	Natural Sciences & Mathematics	12%	10%	10%	12%	10%	9%	8%	11%	10%	10%	10%
	Computer Science & IT	7%	9%	9%	9%	8%	5%	7%	5%	8%	5%	6%
	Medicine & Health	9%	6%	5%	12%	9%	8%	12%	15%	7%	8%	8%
	Total	28%	25%	24%	34%	27%	22%	27%	30%	26%	23%	24%
Market Specific	Humanities	5%	4%	6%	4%	5%	9%	9%	8%	6%	11%	10%
	Arts, Design & Architecture	3%	6%	7%	6%	6%	3%	7%	5%	6%	9%	8%
	Environmental Studies & Earth Sciences	3%	4%	5%	4%	4%	3%	3%	5%	4%	4%	4%
	Education & Training	2%	4%	2%	3%	6%	7%	4%	3%	3%	7%	7%
	Total	14%	18%	19%	17%	21%	22%	23%	22%	19%	31%	29%
Marginal	Applied Sciences & Professions	2%	2%	2%	4%	3%	3%	3%	4%	2%	3%	3%
	Law	2%	2%	2%	1%	2%	4%	3%	3%	2%	2%	2%
	Hospitality, Leisure & Sports	1%	1%	2%	1%	1%	2%	3%	1%	2%	2%	2%
	Journalism & Media	1%	2%	2%	1%	1%	2%	2%	1%	2%	2%	2%
	Agriculture & Forestry	1%	1%	1%	1%	1%	1%	2%	4%	1%	1%	1%
	Total	7%	8%	9%	8%	9%	12%	12%	13%	9%	10%	10%
Grand total	1	1	1	1	1	1	1	1	1	1	1	

Regional differences

In this section Studyportals will investigate further aspects of English-taught higher education. This will identify regional differences and similarities across regions based on several dimensions. First, level and methods can determine where a country sits in terms of its English-taught offer; then formats and English requirements can be used to determine access; lastly disciplines can shed light on the type of ETPs offered.

Where previous sections of the report focused on large hubs with more than 10 institutions, such high-level view underestimates the underlying picture.

What emerges are both large hubs, and a myriad of smaller centres. Figure 12 superimposes the hubs (blue dots) with the large and disperse cloud of ETPs.

The landscape of higher education extends far beyond the EHEA area, and it is present in more nuanced ways than the results from the initial picture, with several programmes outside major cities.

China, some countries in the Middle East, and South-East Asia emerge as important destinations for ETPs; at the same time, Europe shows a large network of delocalised universities.

Figure 12: Destination anywhere

Programmes worldwide and cities with at least 10 programme providers



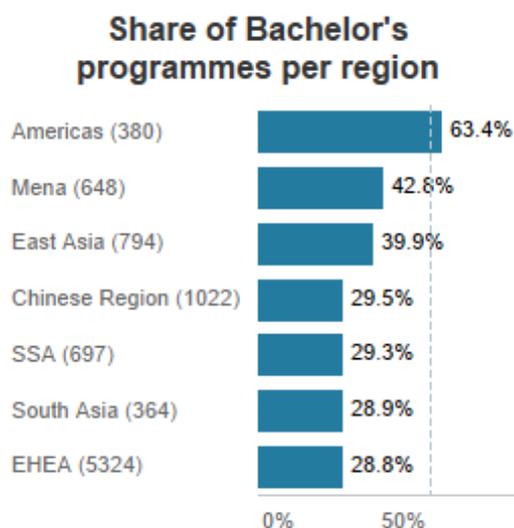
- Blue dots show cities with at least 10 programme providers.
- The size of each dot is proportional to the number of programmes offered.
- The blue cloud shows the location of programmes.
- The darker the colour the more programmes offered in a given location.

Level and method

Levels of education largely reflect the stage at which students start engaging with a new academic language. Countries with a sizeable number of English-taught Bachelor's equip their students with the right tools to move further with their education.

Bachelor's degrees should – in theory – outnumber Master's degrees, as they are a prerequisite of postgraduate education: they represent 59% of programmes in the Big Four (dotted line in Figure 13). While Bachelor's programmes tend by design to have rather general curricula, Master's programmes often share a specialistic angle on their disciplines.

Figure 13: Share of Bachelor's programmes

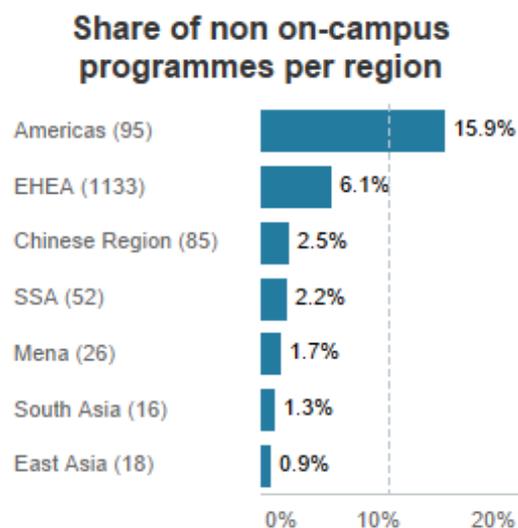


This in turn inflates the number of Master's level ETPs compared to the provision of Bachelor's ETPs. At the same time, the largest share of Master's programmes reflects that English is more often the second academic language of students who had an undergraduate education in their native languages, especially in less common destinations: less than one in three ETPs in the EHEA awards a Bachelor's degree.

The fascination of universities with online education started with distance learning programmes in anglophone countries to differentiate and expand access to higher education. Outside of the English-speaking academia, distance education has been marginal and rose to prominence mostly as part of discussions on the necessity of life-long learning and the up-skilling of an ageing workforce.

The EHEA is the second most important market for non-on-campus degrees, although the share of programmes opening to alternative delivery methods in the EHEA is only 6%, roughly half of the share of programmes common in the Big Four (11% - dotted line in Figure 14).

Figure 14: Share of non-on-Campus programmes



Although programmes delivered partly or entirely online remain marginal in ETP portfolios, the 2020 pandemic forced universities to make a choice: continue face-to-face delivery despite the risk of contagion, or switch to remote delivery accepting the risk of a radical transition.

Most universities still focus their proposition on residential learning experiences, and the shift to

another proposition of autonomous discovery, remote interaction, and physical distance from the classroom is still distant in the future. However, adopting online learning may be a foray into new teaching opportunities, especially by relatively new players.

A broader look of the main providers of ETPs worldwide is painted in broad strokes in Figure 15 (please note that Jamaica is not shown in the figure, despite being an important regional hub for ETPs in the Americas).

Excluding English-speaking countries (Ireland, South Africa), the large destinations are Europe and China.

With many simplifications, a third group of ETPs can be found in the countries in Asia where Bachelor's programmes are more common. These groups are:

1. Europe and China are skewed to the provision of Master's programmes, but here Bachelor's programmes also play a role.
2. Scandinavia, and Russia are mostly offering ETPs at Master's level.
3. South Asia and the Middle East host countries where it is easier to find ET Bachelor's than elsewhere in the world.

Figure 15: Main countries for number of programmes and levels



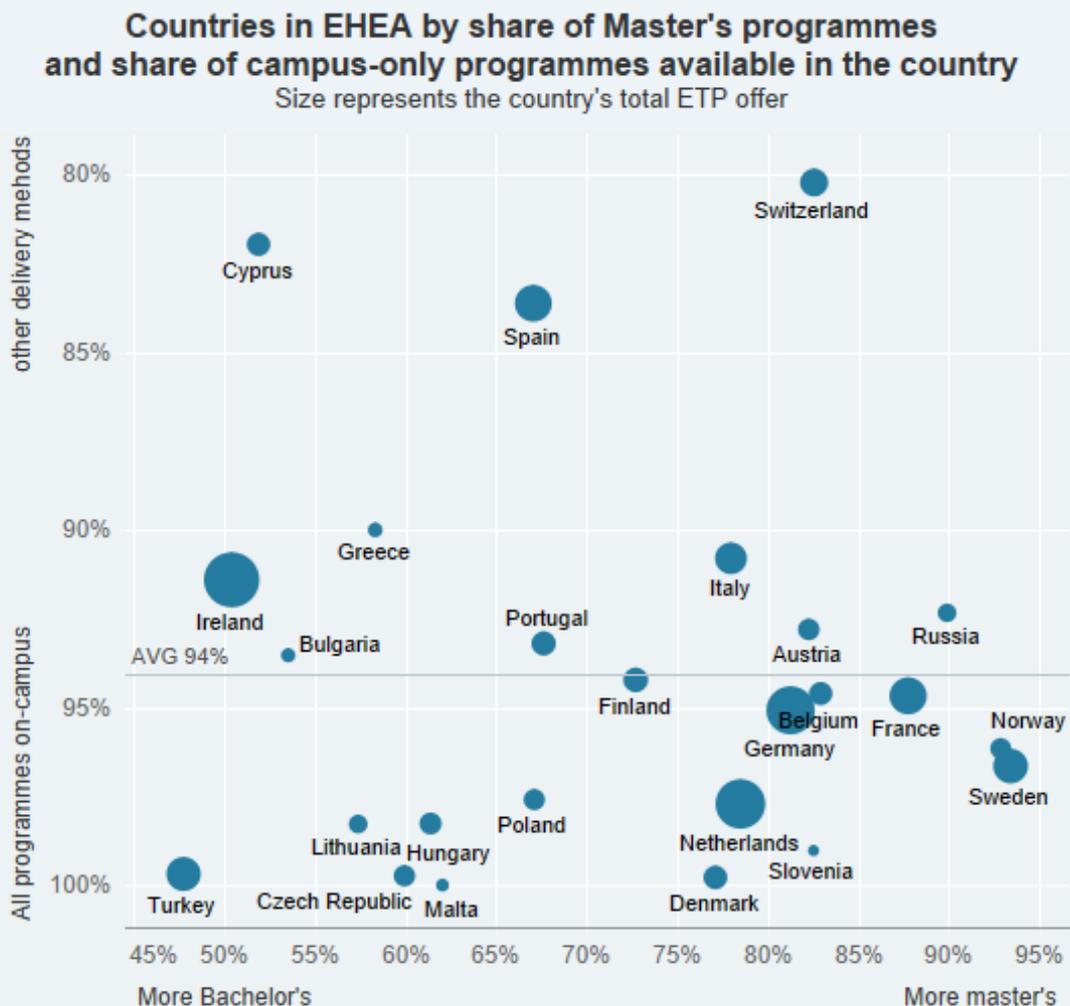
The European HE Area in focus

By its sheer size, the EHEA is the largest global destination for English-taught programmes outside of the Big Four. Its universities are often well-spread, extremely accessible, and a good match for most student pockets.

Internationalisation in the EHEA remains mostly a postgraduate affair, with comparably few English-taught Bachelor's degrees mostly outside of Northern Europe. It is also a matter of delivery methods: most countries rely firmly on on-campus programmes for their ETP portfolios and the only countries with a developed share of online, blended, and mixed methods are Cyprus, Spain, and Switzerland.

However, Master's degree seeking students are generally more autonomous, mobile, and internationally oriented than their younger Bachelor's seeking counterparts, and student movements within the EHEA also reflect the distribution of programmes in the region. Countries like Turkey, Cyprus, Bulgaria, Greece, Spain, and Eastern Europe have a larger share of ET Bachelor's than traditional destination markets in Northern and Western Europe.

Figure 16: EHEA countries by level and method



Format overview

Full-time, on-campus, English-taught education is the most common form of English-taught programme. The share of programmes taught on campus is the highest in Asia, and lowest in English-speaking Destinations, as well as in the Americas. The EHEA, where most of the known ETPs are offered lies in between these two extremes.

On-campus delivery is also available in part-time format: this availability of multiple formats is commonplace in most of the world, but is absent from South Asia, and very limited in the EHEA. Based on formats and methods, it is possible to define three main areas for ETPs worldwide:

1. The Big Four and the Americas, accommodating a larger array of choices (1 in 10 programmes allows for non-residential learning)
2. The EHEA, where on-campus delivery is clearly dominant, but there is a limited online offer (1 in 20 programmes)
3. The rest of the world, where universities have ETPs as part of their residential learning experiences (1 in 50 programmes)

Institutions have generally remained close to the core of their value proposition: a residential learning experience bundling qualifications, socialisation, and personal development.

This brings us to two considerations as to why universities may have shunned online opportunities: firstly, offering programmes online requires infrastructures, expertise, and monitoring that makes it unappealing for most traditional institutions; secondly, ETPs outside the Big Four cater to a more selected audience, combining both domestic students who want to broaden their horizons and internationally mobile students from abroad. For both

groups' international mobility and the social component of learning may be the key parts of the programmes they are looking for.

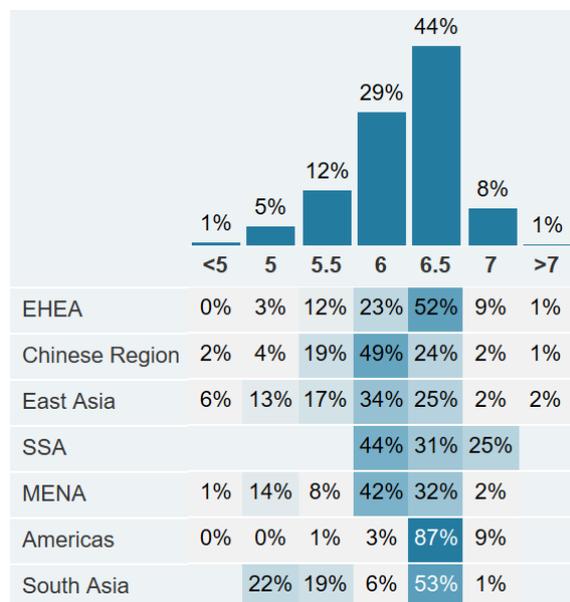
Table 10: Distribution of ETPs by format and method

		Full-time only	Multiple Formats	Part-time only	
EHEA	Campus Only	85%	6%	3%	94%
	Online Only	0%	0%	3%	3%
	Multiple Options	2%	1%	1%	3%
Chinese Region	Campus Only	87%	9%	2%	98%
	Online Only		0%	0%	0%
	Multiple Options	2%	0%	0%	2%
SSA	Campus Only	80%	16%	3%	99%
	Online Only	0%		0%	1%
	Multiple Options	0%	0%	0%	0%
East Asia	Campus Only	87%	12%	1%	99%
	Online Only	0%			0%
	Multiple Options	1%	0%		1%
MENA	Campus Only	87%	9%	2%	98%
	Online Only	0%		1%	2%
	Multiple Options	0%		0%	0%
South Asia	Campus Only	97%	1%	0%	98%
	Online Only	0%		1%	1%
	Multiple Options	0%		0%	0%
Americas	Campus Only	65%	16%	1%	83%
	Online Only	3%	0%	4%	7%
	Multiple Options	5%	1%	4%	10%
Main English Destinations	Campus Only	75%	12%	2%	89%
	Online Only	1%	1%	4%	5%
	Multiple Options	3%	3%	1%	6%
		80%	15%	6%	

English requirements differences

IELTS requirements for ETPs vary slightly per destination, with a preference in the EHEA for higher scores. The separation line between IELTS scores falls between IELTS 6.0 and IELTS 6.5, with most programmes falling under either one or the other scores.

Figure 17: Distribution of IELTS requirements per region



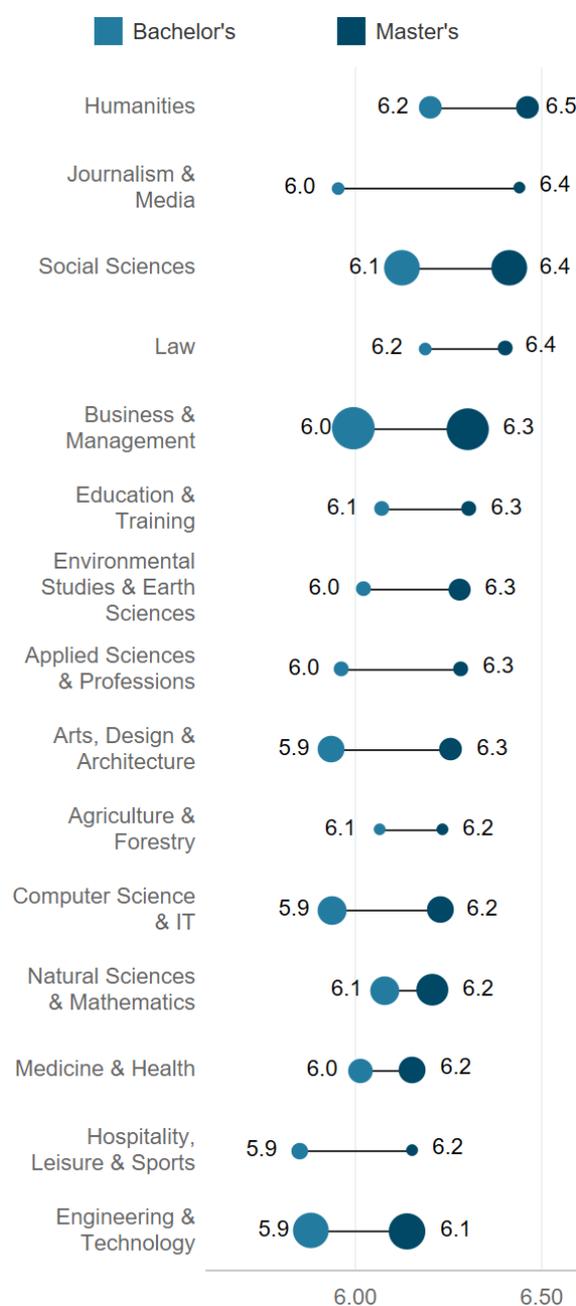
A breakdown by discipline and level sheds some light on the different score requirement to access different levels of education. Two elements emerge:

1. More theoretical subjects show higher entry requirements, while hands-on technical disciplines are relatively less selective in their language requirements.
2. The differences on average scores are not very pronounced.

This second finding leaves plenty of negotiating room for universities that can decide rather freely to be either on the high end of the entry requirements (6.5 to 7.0) or choose a more inclusive path (5.5 to 6.0).

While institutions can be tempted to lower admission criteria, students who enter higher education with lower levels of English often require more on-campus support from the institution once their studies begin. Many institutions therefore request a minimum IELTS band score of 6.

Figure 18: IELTS requirements per band score by level and discipline



5. Conclusion

In the last 5 years ETPs outside of the Big Four anglophone countries grew by 77%. Despite the EHEA adding the largest number of ETPs, the fastest growing locations were the Chinese region and Sub Saharan Africa. Both regions are more than doubling their programme offering, possibly in response to growing demographic demands.

While the US and the UK remain the major providers worldwide, the impact of ETPs in non-anglophone countries cannot be underestimated, for several reasons. Firstly, English is adopted as a language of education by many institutions that offer normally operate small programme portfolios. The landscape of universities offering ETPs is populated by a multitude of institutions and while some countries host large universities with sizeable portfolios (e.g., Malta, Jamaica, Hong Kong, Malaysia), most offer a relatively limited number of ETPs. Moreover, institutions offering ETPs are usually ranked. While this characteristic seems to be the norm rather than the exception also in the Big Four, it is not uncommon to find highly ranked institutions offering ETPs.

Secondly, the largest number of ETPs open to international students are in just a handful of countries: the Netherlands, Germany, and China stand out by overall size. Ireland and South Africa at the same time are countries with a large ETP offer, but where the focus is less on internationalisation. Countries are not the only way to consider the global landscape of ETPs, however, and some cities show a large concentration of HEIs: Paris, Barcelona, Berlin, Istanbul, and Milan are just ahead of Beijing and Shanghai in hosting the largest number of institutions with ETPs portfolios.

Thirdly, portfolios are growing more diversified. Although key disciplines like Business & Management, Social Sciences, and Engineering & Technology make up almost half of the programmes offered – in the Big Four is only one-third – they were also the slowest growing disciplines. The fastest growth has been among disciplines like Environmental Studies & Earth Sciences, Arts, Design & Architecture, Humanities, and Education & Training: the gap between anglophone countries and the rest of the world is narrowing, and portfolios are more likely to compete in more varied subject areas.

Furthermore, in relation to location and level of education, European destinations are focusing more on Master's programmes, where other destinations have more parity between the Bachelor's and Master's levels. There are also imbalances, however, within EHEA: Northern Europe has a stronger focus on post-graduate education, while Southern and especially Eastern Europe maintain more balanced portfolios. One common characteristic involves the methods (online, on-campus, and mixed) and formats (part-time and full-time) of ETPs outside the Big Four, because ETP delivery is one-sided: almost all programmes are on-campus, full-time experiences, except for a handful of European countries where distance learning is picking up pace.

Although we cannot predict that all changes are here to stay, we estimate that ETP growth will continue and contribute to the diversification of the HE landscape. Monitoring trends and changes in ETPs will require more than an overview of the supply of programmes globally: as opportunities for students to study in English anywhere in the world continue to grow, it is necessary to listen to student voice to determine where the industry is headed.

6. Appendix

Table 11: ETPs per country in 2017-2021

Destination	ISO Code	Jan 2017	May 2021
Ireland	IE	1,438	2,776
China	CN	586	2,481
South Africa	ZA	459	1,963
Netherlands	NL	1,459	1,937
Germany	DE	1,132	1,826
France	FR	733	1,035
Spain	ES	683	995
Sweden	SE	846	952
Turkey	TR	567	941
Malaysia	MY	337	848
Italy	IT	635	733
Hong Kong (SAR)	HK	203	690
Switzerland	CH	565	624
India	IN	89	555
United Arab Emirates	AE	127	509
Finland	FI	375	498
Portugal	PT	151	463
Belgium	BE	314	426
Denmark	DK	530	424
Hungary	HU	214	397
Cyprus	CY	254	386
Czech Republic	CZ	210	375
Austria	AT	265	371
Norway	NO	286	351
Poland	PL	360	346
Jamaica	JM	26	298
Pakistan	PK	3	290
Singapore	SG	120	272
Russia	RU	168	268
Lithuania	LT	206	230
Thailand	TH	80	195
Japan	JP	147	187
Palestinian Territory, Occupied	PS		185
Philippines	PH		177
Greece	GR	295	174
Bulgaria	BG	50	169
Northern Cyprus	CY	83	161
South Korea	KR	77	155
Taiwan	TW	182	145
Namibia	NA	4	137
Malta	MT	5	136
Latvia	LV	84	123
Egypt	EG	101	106
Israel	IL	130	103
Slovenia	SI	87	102
Saudi Arabia	SA	12	91
Qatar	QA	74	81
Estonia	EE	76	79
Kenya	KE	213	73
Macao (SAR)	MO	1	73
Kazakhstan	KZ	40	70
Luxembourg	LU	49	55
Romania	RO	72	54
Slovakia	SK	30	53
Iran	IR	3	52
Iceland	IS	43	51
Oman	OM	2	39
Trinidad and Tobago	TT	22	36
Sri Lanka	LK	1	36
Colombia	CO	65	35
Croatia	HR	18	33
United States Virgin Islands	VI	32	29
Nicaragua	NI		28
Bangladesh	BD		28
Georgia	GE	21	27
Nigeria	NG	17	27
Macedonia (FYROM)	MK	9	27
Mauritius	MU	5	26
Belize	BZ		26
Bahrain	BH	23	23
Uganda	UG	23	22
Kyrgyzstan	KG	12	16
Lebanon	LB	26	15
Grenada	GD	10	14
Bosnia and Herzegovina	BA	2	14
Indonesia	ID	18	12
Albania	AL	1	11
Puerto Rico	PR		11
Armenia	AM	10	10
Mexico	MX	1	10
Cayman Islands	KY	2	8
Monaco	MC	12	7
Aruba	AW	8	6
Serbia	RS	7	6
Brazil	BR	15	5
Vietnam	VN		5
Curaçao	CW	11	4
Afghanistan	AF	5	4
Ukraine	UA	1	4
Costa Rica	CR		4
Rwanda	RW	15	3
Liechtenstein	LI	5	3
Guyana	GY	3	3
Antigua and Barbuda	AG		3
Ethiopia	ET	2	2
Bhutan	BT	4	1
Sint Maarten	SX	1	1
Jordan	JO	1	1
Saint Kitts and Nevis	KN		1
Peru	PE		1
Cameroon	CM	39	
Samoa	WS	4	
Dominica	DM	3	
Maldives	MV	2	
Solomon Islands	SB	1	
Montserrat	MS	1	
Ghana	GH	1	
Fiji	FJ	1	
Djibouti	DJ	1	
Total		15,742	27,874

About British Council

The British Council builds connections, understanding and trust between people in the UK and other countries through arts and culture, education and the English language.

We help young people to gain the skills, confidence and connections they are looking for to realise their potential and to participate in strong and inclusive communities. We support them to learn English, to get a high-quality education and to gain internationally recognised qualifications. Our work in arts and culture stimulates creative expression and exchange and nurtures creative enterprise.

About IELTS

IELTS - the International English Language Testing System - is the world's most popular English language test for work, study and migration. More than 11,000 organisations trust IELTS as a reliable indicator of true-to-life ability to communicate in English.

Delivered on either computer or paper, IELTS assesses a test taker's English language proficiency across four skills: listening, reading, writing and speaking. It is the only high-stakes language test recognised for migration across Australia, Canada, New Zealand and the United Kingdom.

With a focus on human conversations, IELTS was a pioneer of four-skills English language testing more than 30 years ago and continues to set the standard for English language testing today.

About Studyportals

Studyportals is the global study choice platform. We help students find and compare all their education options globally, and make an informed choice. We help institutions to optimise their classroom from a quantity, quality and diversity perspective, on the basis of results. Over 50 million students annually from 220 countries and territories worldwide choose between 207,000+ programmes from over 3,700 universities in 117 countries, which allows us to help our clients with best practice from all over the world. Our mission is to empower the world to choose education.

Studyportals Analytics and Consulting Team

The Analytics and Consulting Team (ACT) at Studyportals advises and assists universities and other organisations in the higher education sector to realise their ambitions in the field of international marketing and international student recruitment. Our team of consultants covers everything from strategy, branding and marketing to customer relationship management (CRM), student recruitment, market insight, competitor analysis, web analytics, training as well as custom services. Our four areas of expertise are Analytics & ROI, Strategic Consulting, Market Insight & Intelligence and Staff Development Training.

Contact the authors

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Megan Agnew works as the IELTS Global Partnerships Manager, spearheading initiatives in support of higher education institutions. She brings together experience working with stakeholders, education marketing and international communication skills.

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