

Mapping English-taught programmes in Europe

Europe's rising significance for international education

 **studyportals**
Analytics and Consulting

 **BRITISH COUNCIL**

IELTS

Foreword by
Piet Van Hove from

 **EAIE**
European Association for
International Education

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"The European Economic Area (EEA) has the most diverse and innovative high-quality offering of higher education opportunities anywhere, including the world's oldest universities and a large variety of higher education systems with varying strengths in unique contexts. Europe also has a different flavour of internationalisation of higher education than the rest of the (Anglo-Saxon) world, having been shaped by Erasmus over the past 35 years, with the Bologna Process promoting transparency and openness. While multilingualism is a key goal of Erasmus, in reality this programme prompted universities in many countries to start teaching at least a limited number of courses in English. Offering fully English-taught programmes, and thereby entering the competition to attract international degree-seeking students, only became a priority for most universities later on.

COVID-19 obviously caused a tremendous shock to higher education around the world. It was at the time an open question what the longer-term effect would be on flows of international students. Adding to this in recent years, political trends are severely affecting migration policies as well as putting higher education in a defensive mode. All this adds up to a highly volatile and uncertain landscape for international student mobility. Provision of English-taught programmes is a key indicator of the state of internationalisation, and the EEA is still emerging a strong alternative to the Big Four. More and more, students are looking for truly global education experiences and going off the beaten path.

Against this backdrop, this report by Studyportals and British Council IELTS provides a very useful state of affairs concerning the supply of English-taught programmes across the EEA. Based on solid data, universities and policymakers will see some fascinating trends emerging as indications of changing priorities in different countries. Specific attention is given to fully online degree programmes. While there is definitely a big increase in the offer of such programmes, the overall share remains relatively small, especially at the bachelor level. Bearing in mind the experience of going fully online during the pandemic, this can be seen as surprising. I see it as confirmation that, especially at the bachelor level, higher education is about much more than just the dry transfer of knowledge.

The information in this report will definitely support more evidence-based conversations on the future of international higher education across Europe."

Piet Van Hove
President of the European Association for
International Education (EAIE)



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Part 1

Introduction



Introduction

The British Council and Studyportals have collaborated to create a series of thought leadership reports exploring the global provision of English-taught programmes (ETPs).

These reports offer insights into the current higher education market, focusing on trends in both on-campus and online study at the Bachelor's and Master's levels.

While the largest providers of ETPs—often referred to as the “Big Four” study destinations (the US, UK, Canada, and Australia)—dominate the market, the EEA region stands out as a key alternative, offering a wide range of ETPs for students interested in studying abroad or online.

As of June 2024, 43% of the on-campus English-taught programmes outside the Big Four destinations are in the EEA region. 58% of the online English-taught programmes outside the Big Four are in the EEA region.

What makes Studyportals data unique?

Forward-looking: prospective students visit our websites 1 to 2 years before they enrol.

Uniquely large sample size: based on more than 55 million unique visitors annually (and growing) specifically interested in studying abroad, accounting for over 62 million sessions and more than 220 million pageviews.

Very balanced global audience: visitors from more than 240 countries, well-distributed across the entire globe, providing a good representation of international student interest.

Extensive coverage: with more than 270,000 individual Bachelor's and Master's programmes listed in 117 countries; we cover more than 90% of the English-taught programmes worldwide.

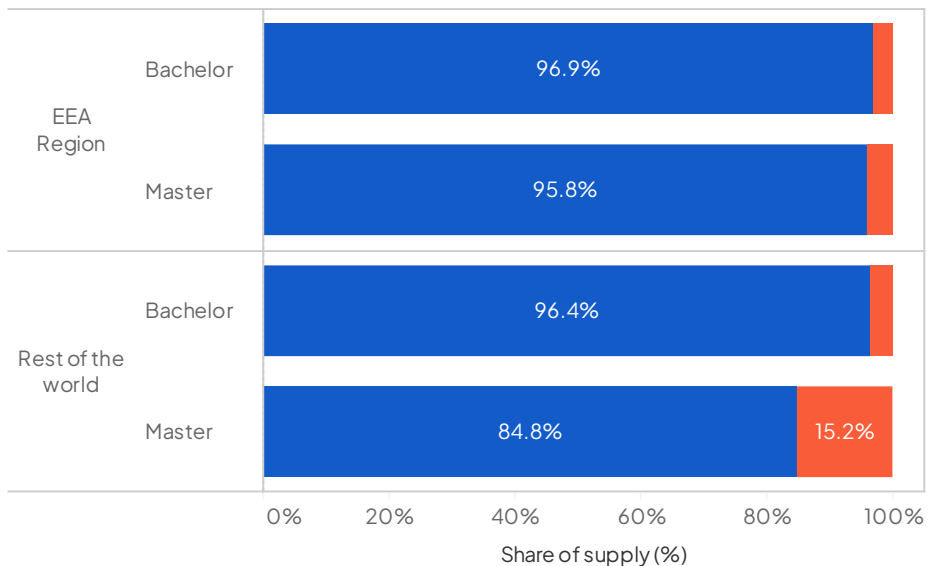
Uniquely granular: 270,000 study programmes, 80,000 cities of origin, 15 disciplines, 284 subject areas, 5 academic levels, 4 entry requirements.

Advanced segmenting and filtering: our dashboards allow to retrieve extremely specific insights, using an extensive set of filtering options.

Face-to-face is the dominant study method

Most countries rely firmly on on-campus programmes for their ETP portfolios, with the only EEA countries having a relatively higher share of online, blended, and mixed study methods being Greece, Spain, and Switzerland.

Share of Bachelor & Master programmes by method, EEA Region vs. Rest of the World (as of June 2024)



Study Method

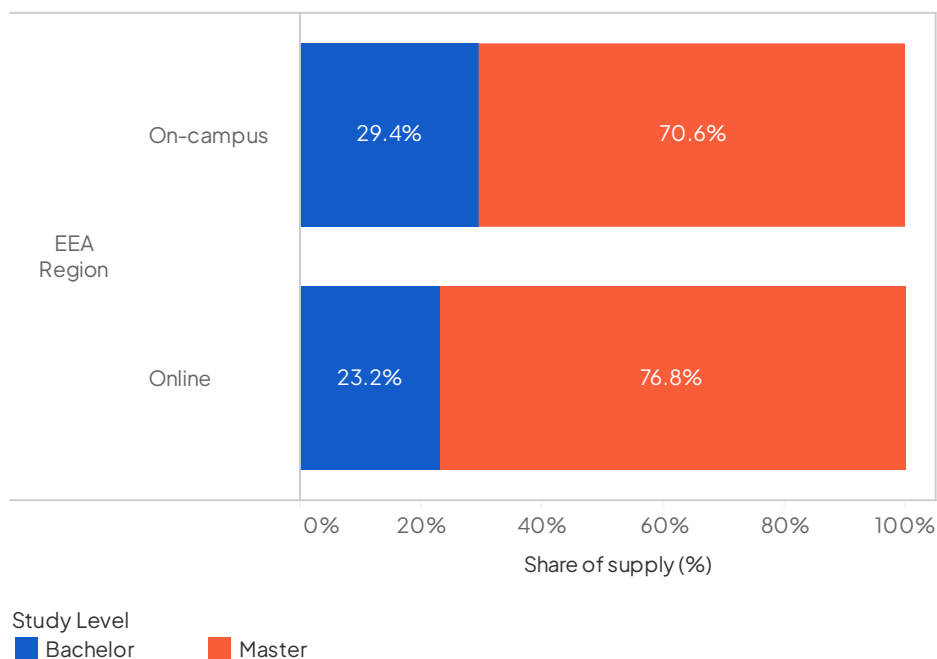
■ On-campus

■ Online

EEA Master's are the preferred offer

Internationalisation in the EEA region remains focused on Master's programmes, with comparably few English-taught Bachelor's offered outside North and West Europe. Institutions prioritise supplying Master's programmes, especially for online studies. Among the top destinations that offer such supply are Germany, the Netherlands, Sweden, France, and Italy.

Share of Online & On-campus programmes by level (as of June 2024)



Part 2

On-campus Programmes in the EEA Region

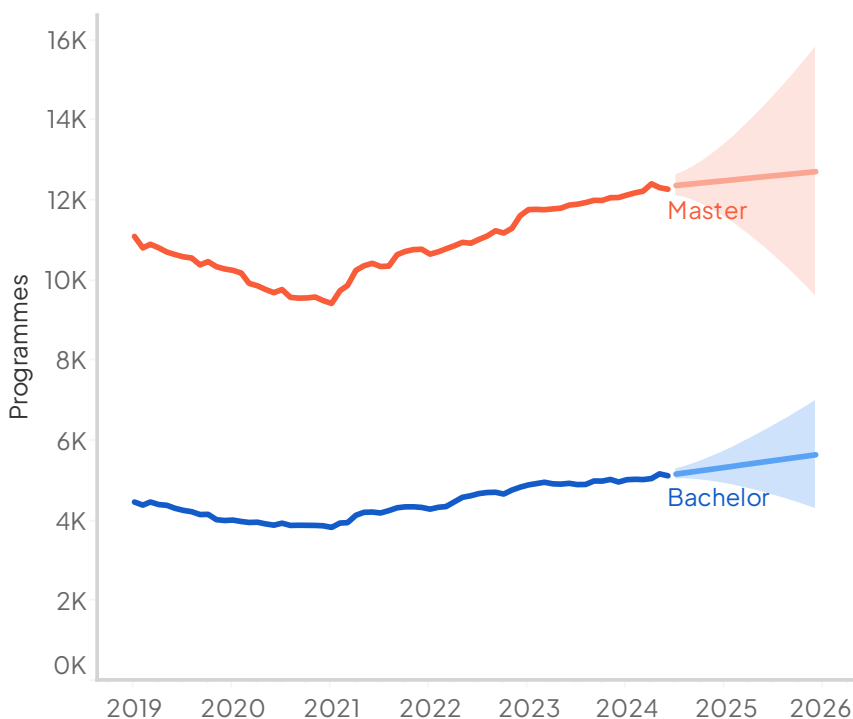


On-campus supply on a gradual, upward trend

Destinations in the EEA region have gradually expanded their range of on-campus programmes.

This trend looks set to continue in the short term, as indicated by the predicted growth into 2026, with more clarity for Bachelor's offers.

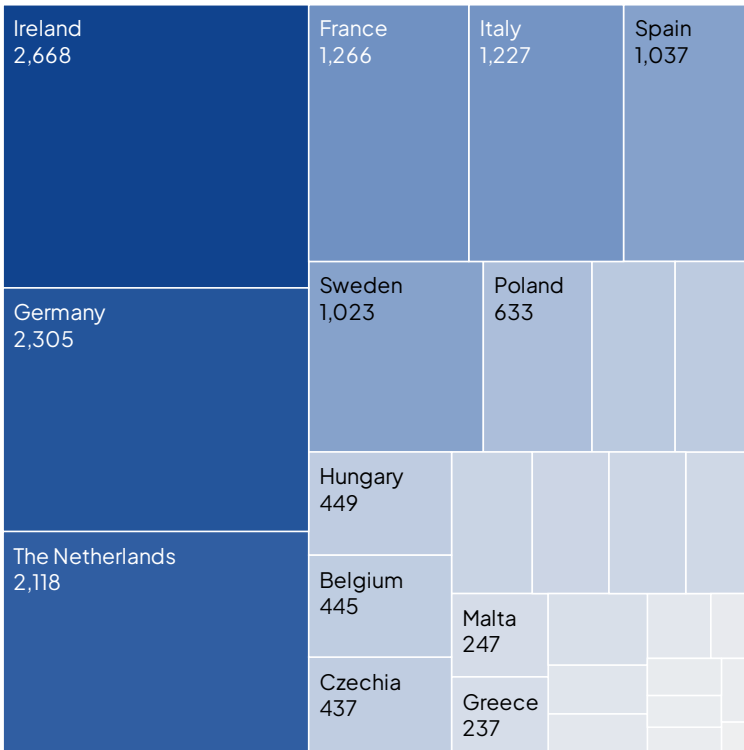
Trend in on-campus programme supply in the EEA region



Ireland, Germany, and the Netherlands in the lead

In terms of the countries providing the most on-campus offers, then institutions in the Republic of Ireland, Germany, and the Netherlands are the top suppliers. Some of the smallest suppliers include Luxembourg (68 programmes), Croatia (65), and Slovenia (33).

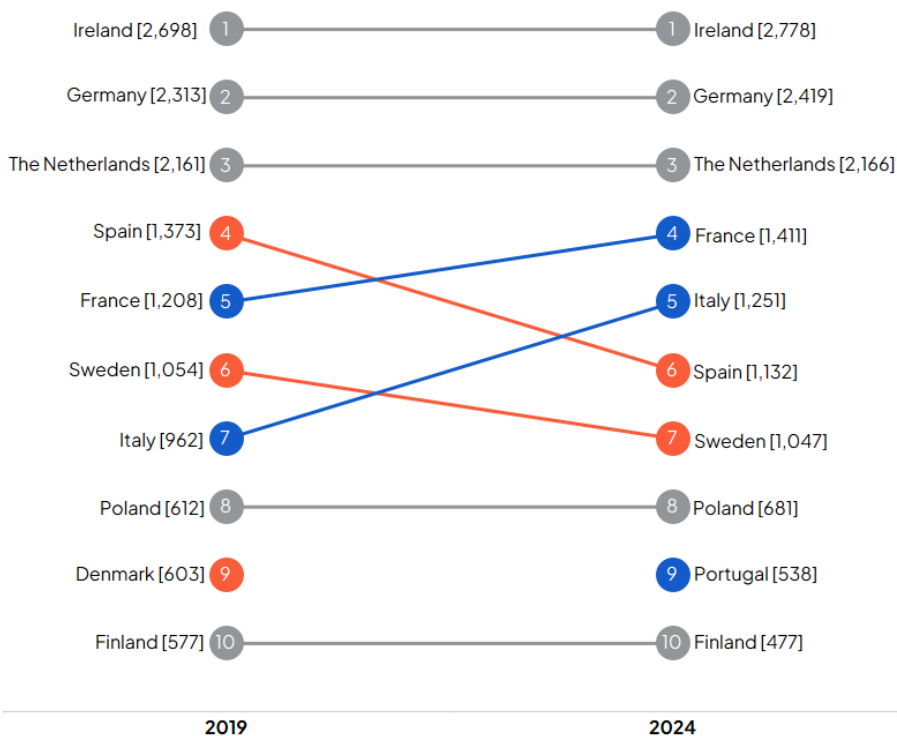
EEA countries by size of on-campus portfolio
(Bachelor's & Master's combined, as of June 2024)



General stability amid slight shifts in EEA supply

Overall, the top 10 suppliers in the EEA region have shown relative stability in programme supply since 2019. It is interesting to note, however, Spain, Sweden, Denmark, and Finland have significantly reduced their offerings, while institutions in France, Italy, and Portugal have expanded their on-campus provision.

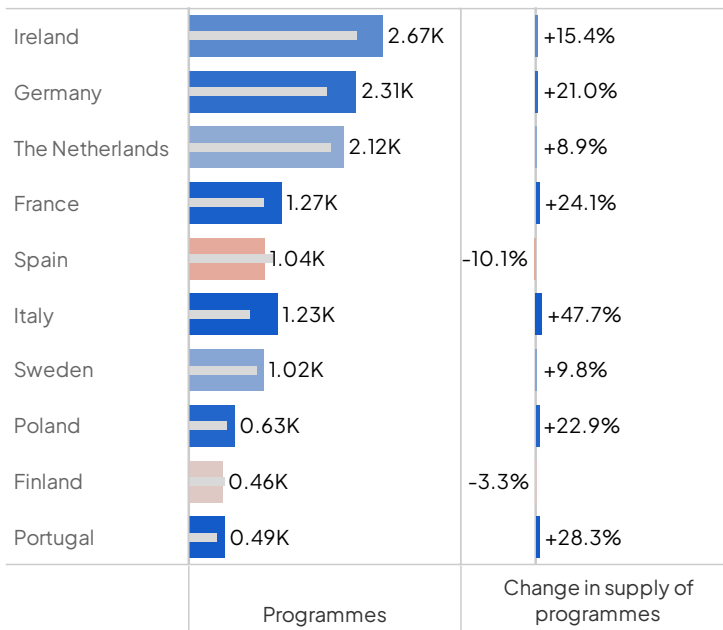
Position of top-10 destinations in the EEA by on-campus supply



EEA supply per destinations growing

Another perspective is to consider the change in supply in absolute terms. In this context, most of the top EEA suppliers have actively expanded their on-campus portfolios, with the exceptions of Spain and Finland, which have shown a decline in their respective supply.

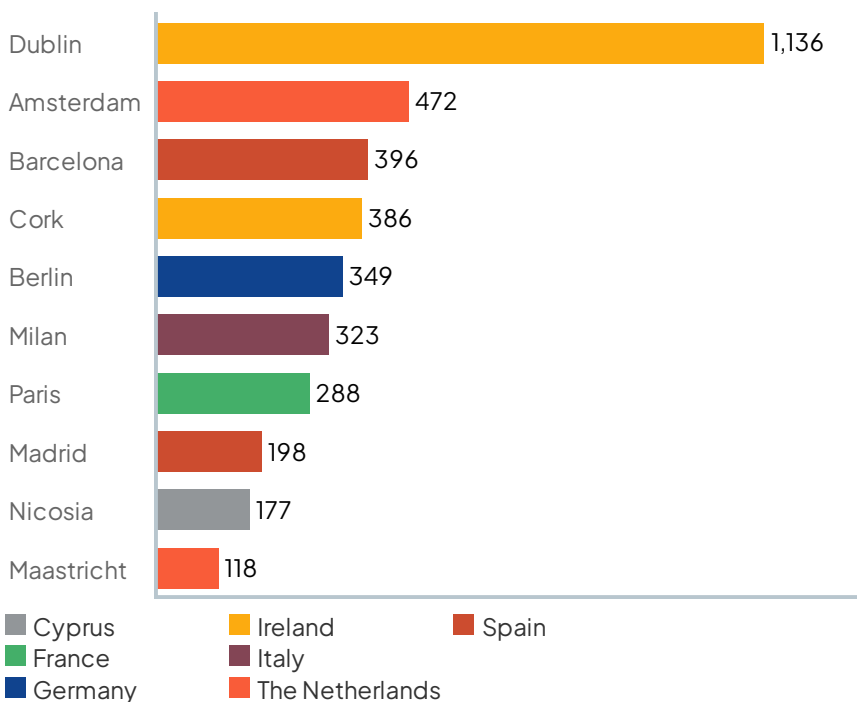
Change in online supply for top-10 EEA destinations
(Bachelor & Master's combined, Jan. '19 vs. Jun. '24)



Irish, Dutch, and Spanish cities as top suppliers

When examining cities in the EEA region, it is unsurprising that Irish institutions emerge as significant providers of on-campus programmes, with Dublin and Cork both ranking in the top-10. Dutch institutions in Amsterdam and Maastricht, as well as Spanish institutions in Barcelona and Madrid, follow closely behind.

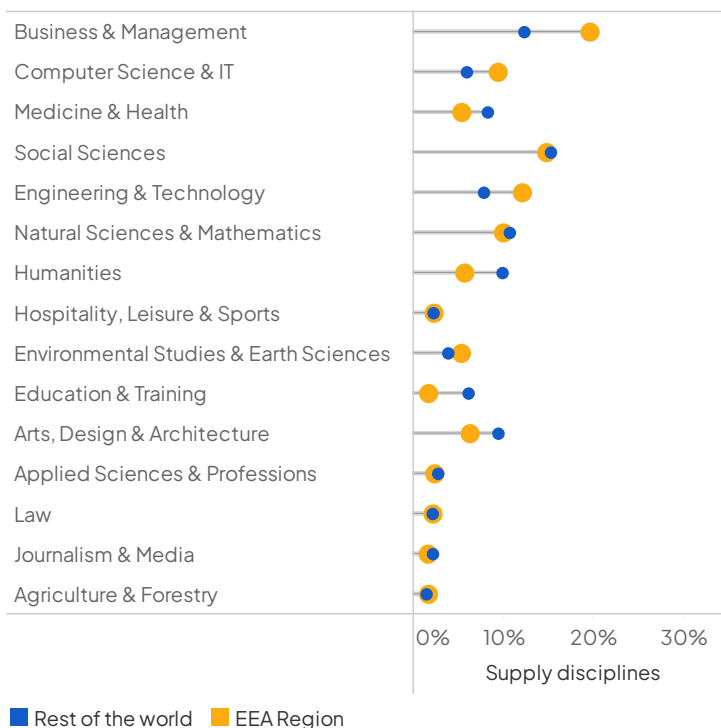
Top-10 cities in the EEA region by on-campus supply
(Bachelor & Master's combined, as of June 2024)



EEA supply by field lower than global average

An analysis of programme supply by discipline shows that the EEA region prioritises different fields compared to the rest of the world, with EEA institutions offering more programmes in Business and Engineering.

Share of on-campus supply by discipline, EEA vs. Rest of the world (Bachelor's & Master's combined, as of June 2024)



Part 3

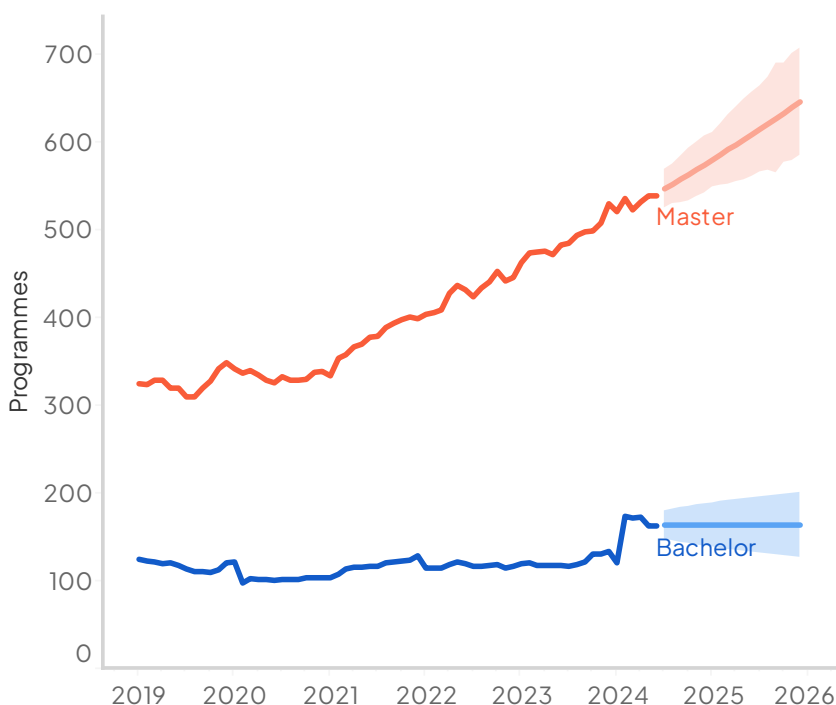
Online Programmes in the EEA Region



Online Master's programmes on the rise

Since 2021, the supply of online Bachelor's and Master's in the EEA region rose by 67.3%, forecasts indicate that they will continue to increase. On the other hand, online Bachelor's programmes are projected to show a stagnant trend in supply, indicating that institutions are more likely to invest in Master's programmes instead of appeal to the international student market.

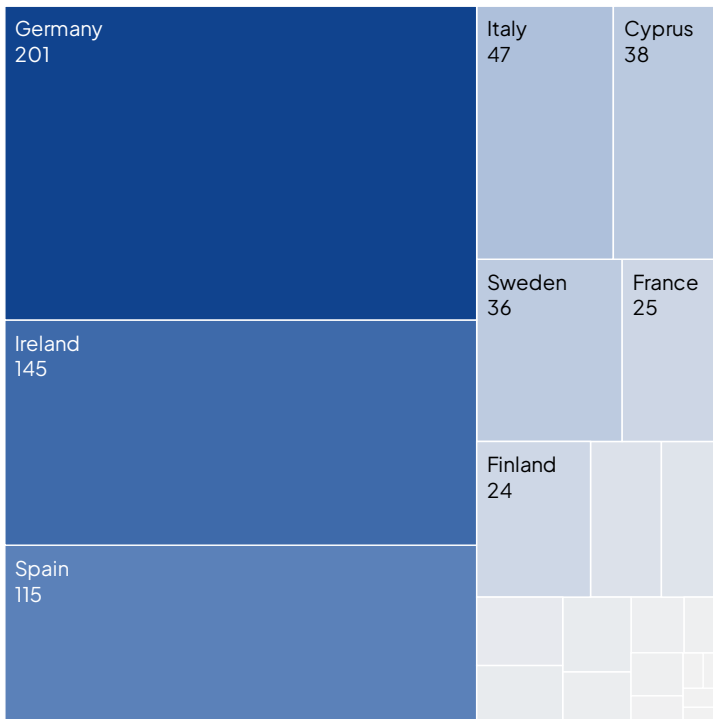
Trend in online programme supply in the EEA region



Germany at the top of the game in online supply

EEA countries that offer the highest supply of online programmes include Germany, Ireland, Spain, and Italy. Germany's supply since 2019 has skyrocketed by around 83%.

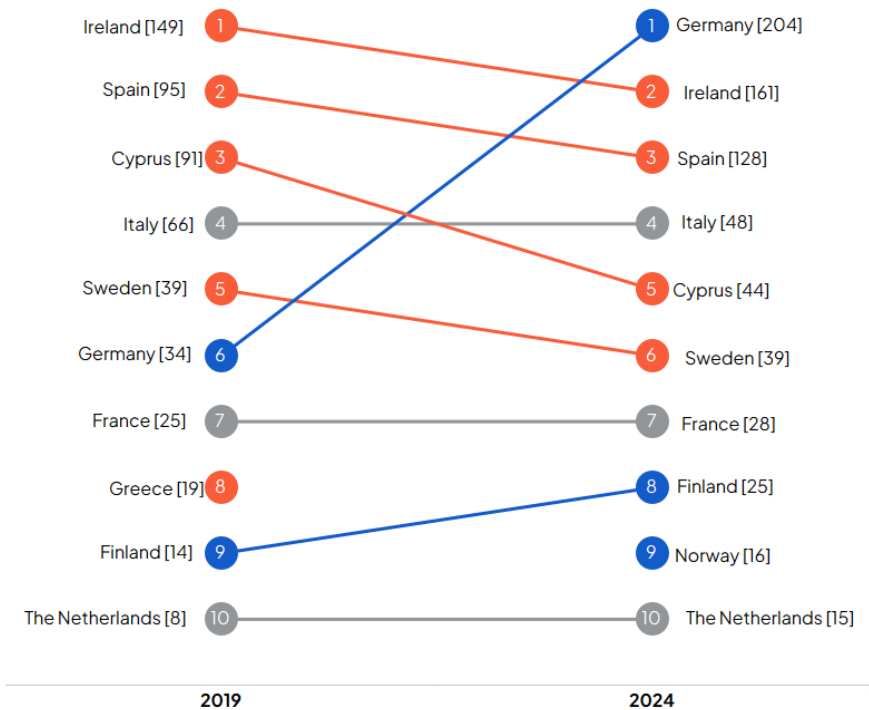
EEA countries by size of online portfolio
(Bachelor's & Master's combined, as of June 2024)



Who is next in line?

Germany has risen to the top spot in supply, while Ireland and Spain have surged ahead, securing the second and third positions as top destinations in the EEA, respectively. Despite reducing its supply since 2019, Italy remains steady in 4th place.

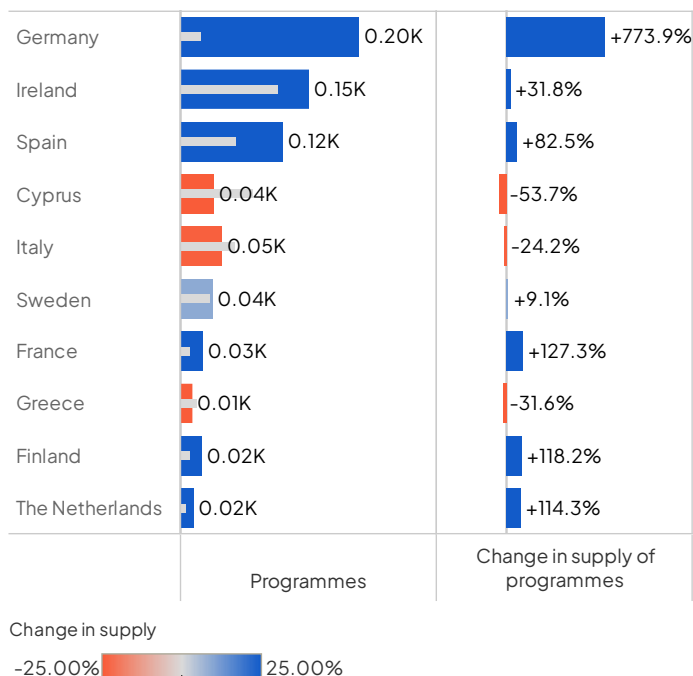
Position of top-10 destinations in the EEA by online supply



Taking a step back – EEA countries that have reduced their supply.

Alongside Germany, Ireland, and Spain, other countries such as France, Finland, and the Netherlands have also shown a high increase in supply of online programmes. Even though Cyprus and Italy are still among the top-5, they have decreased their supply.

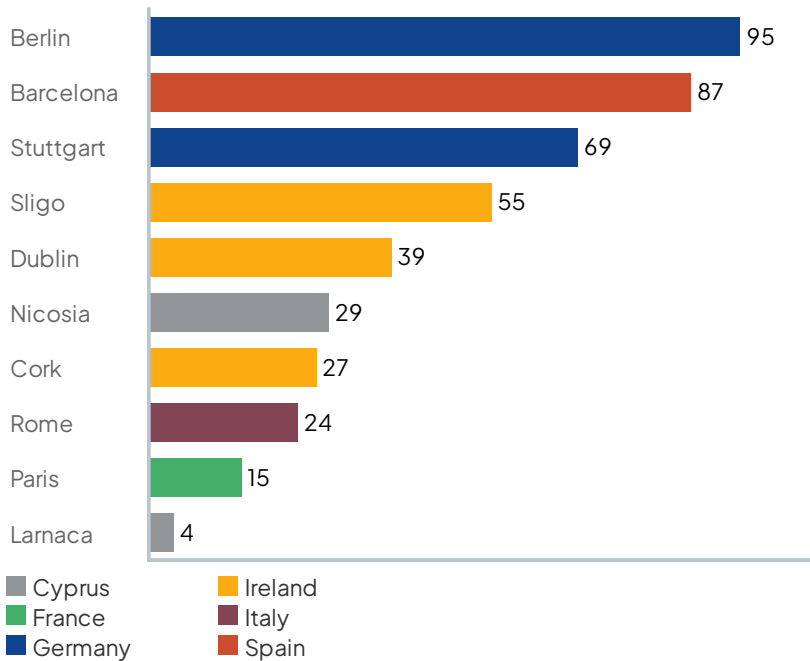
Change in online supply for top-10 EEA destinations
(Bachelor & Master's combined, Jan. '19 vs. Jun. '24)



Irish Cities Dominate EEA's Top 10 for Online Programme Supply

Berlin, Barcelona, Stuttgart, and Sligo are among the top cities in the EEA region with the highest supply of online programmes. Ireland stands out, with three of its cities making it into the top 10.

Top-10 cities in the EEA region by online supply
(Bachelor & Master's combined, as of June 2024)



Business and Computer Science, EEA's main focus.

Online programmes in the EEA region are predominantly focused on Business & Management and Computer Science & IT. In fact, the supply in these disciplines exceeds that of the rest of the world, highlighting the EEA countries' strong presence in these fields.

Share of online supply by discipline, EEA vs. Rest of the world (Bachelor's & Master's combined. as of June 2024)



Part 4

Conclusion



Conclusion

As some study destinations embrace the opportunity to reach internationally mobile students, the adoption of English as a language of instruction is changing in other study destinations.

In 2021, Denmark reduced the number of English-taught programmes (ETPs) to limit costs and focus on local students. However, by 2023, under pressure from employers and facing a labour shortage, the government reversed its decision, allowing 1,100 more spots for international students in ETPs annually from 2024, with plans for 2,500 more spots per year from 2029. Meanwhile, the Netherlands, in 2023, unveiled plans to reduce the supply of ETPs to control inbound international student numbers.

Several popular study destinations are also implementing policies that restrict international student mobility, with social, economic, and political crises in many source markets further limiting students' ability to study abroad. Consequently, the digital landscape presents a promising opportunity for EEA institutions to enhance their reputation in both face-to-face and online education.

As geopolitical shifts and domestic policies negatively impact traditional markets for ETPs, integrating accurate data and business intelligence becomes vital. Doing so enables institutions to navigate emerging challenges effectively, remain competitive, and meet international students' needs.

It is also important to consider how standardised frameworks and language assessment policies are adopted in contexts where English as a Medium of Education (EME) is expanding. As the provision of English-taught programmes continues to redefine the higher education landscape and the choices available to international students, ongoing knowledge-sharing and collaboration will be critical in establishing EME in the EEA and beyond.

About British Council

The British Council is the UK's international organisation for cultural relations and educational opportunities. We support peace and prosperity by building connections, understanding and trust between people in the UK and countries worldwide. We do this through our work in arts and culture, education and the English language. We work with people in over 200 countries and territories and are on the ground in more than 100 countries. In 2022–23 we reached 600 million people.

About IELTS

IELTS - the International English Language Testing System - is the world's most popular English language test for work, study and migration. Jointly owned by the British Council, IDP: IELTS and Cambridge University Press & Assessment, IELTS is trusted by more than 12,500 organisations around the world as a reliable indicator of true-to-life ability to communicate in English. Available on computer, on paper and online, IELTS assesses a test taker's English language proficiency across four skills: listening, reading, writing, and speaking. With a focus on human conversations, IELTS was a pioneer of four-skills English language testing more than 35 years ago and continues to set the standard for English language testing today.



About Studyportals

Studyportals is the global study choice platform and started as a spin-off of European Students' associations in 2007. Our mission is to empower the world to choose education. We are determined to make your international higher education marketing easier and more effective. Over 55 million users annually from 240 countries and territories worldwide look to offer over 207,000 programmes from over 3,700 institutions in almost 120 countries, which allows us to help our clients with best practice from all over the world.

Studyportals Analytics and Consulting Team

The Analytics and Consulting Team (ACT) at Studyportals advises and assists institutions 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 student recruitment, market insight, competitor analysis, training as well as custom services. Our four areas of expertise are Analytics & ROI, Strategic Consulting, Market Insight & Intelligence and Staff Development Training.





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