



Tuition in English at European universities: recent trends and impact

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English-Taught Programmes in Continental Europe. Results from an ACA study.

Bernd Wächter, Academic Cooperation Association (ACA)
Services for International Education Marketing Conference
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Background

Two ACA predecessor studies (2002, 2008). Like the present one, mapping exercises of English-taught programmes (ETPs)

- 2002: 19 European countries, almost 1,600 HEIs;
- 2008: 27 European countries, about 2,200 HEIs
- 2014: 28 European countries, about 2,600 HEIs

Main results

- A quantitatively important phenomenon, with a flattening growth curve, and modest enrolment
- Concentrated in the Netherlands, the Nordic and Baltic countries and Switzerland, and at large, multidisciplinary university-type institutions
- Almost no provision in southern and modest provision in east-central Europe (Alps remain ETP watershed)



Methodology

- A project of ACA, GES (Kassel) and StudyPortals (Eindhoven), funded by the LLP of the European Union
- Geographical coverage: 28 countries (EU-28 minus UK, IRL, Malta and LUX; EFTA minus LIE; and Turkey)
- Institutional eligibility: right to participate in Erasmus (« charter »); ETP definition: 100% taught in English, at Bachelor and Master level (no sub-Bachelor, no PhD programmes)
- Two main questionnaire-based surveys:
 - ✓ Institutional survey (to identify ETPs), about 2,600 HEIs
 - ✓ Programme survey (to collect information and data on each ETP), around /8,000 ETPs. Use of StudyPortal database.
- Carried out mainly in 2014.



Basic data

- Total sample institutional survey: 2,637 HEIs
- Response rate institutional survey: 1,155 HEIs (= 43.8%)
- Number of ETPs identified by institutional survey plus StudyPortals database: 8,089 HEIs
- Response rate programme survey: 1,154 (=16.2%)
- Statistical analysis at programme level problematic



The leaders in absolute numbers

Country	Number of programmes 2014	Number of programmes 2008
The Netherlands	1,078	509
Germany	1,030	214
Sweden	822	123
France	499	79
Denmark	494	96
Turkey	459	94
Estonia	417	18
Poland	405	90
Finland	395	208



The leaders in relative terms (1)

Country	ETPs of all programmes (2014)	ETPs of all programmes (2008)
All 28	5.7	0.7
Denmark	38	7.4
The Netherlands	29.9	17
Cyprus	25.5	2.5
Sweden	24.2	4.1
Finland	23.2	13.9
HR	1.2	No data available



The leaders in relative terms (2)

Country	Enrolment in ETPs as a share of total enrolment in % (2014)	Enrolment in ETPs as a share of total enrolment in % (2008)
All 28	1.3	0.7
Denmark	12.4	3.0
The Netherlands	7.2	5.3
Cyprus	6.6	25.9
Sweden	4.4	0.8
Finland	2.9	2.7
HR, GR, BG	0.1	No data available



Top 12 countries by multi-criteria

Country	Rank / mean value 2014	Rank / mean value 2008	Rank / mean value 2002
Netherlands	1 / 2.3	1 / 2.0	2 / 3.0
Denmark	2 / 3.0	6 / 7.7	4 / 6.3
Sweden	3 / 3.3	4 / 6.7	9 / 8.0
Finland	4 / 3.7	2 / 2.3	1 / 2.0
Cyprus	5 / 4.7	3 / 3.3	No data
Switzerland	6 / 7.0	5 / 7.3	12 / 8.0
Lithuania	7 / 8.3	9 / 10.7	No data
Latvia	8 / 9.7	15 / 13.3	No data
Austria	9 / 10.0	16 / 13.7	16 / 14.3
Norway	9 / 10.0	6 / 7.7	7 / 7.3
Iceland	11 / 11.7	23 / 23.3	4 / 6.3
Estonia	12 / 12.7	25 / 24.7	No data



Quantitative importance of ETPs (1)

- **Tremendous growth in ETP numbers:** from slightly over 700 (2002) to nearly 2,400 in 2008 to almost 8,100 in 2014
- Likely artificial effect of increase from 19 countries (2002) to 28 (2014) and inclusion of the programmes listed in StudyPortals database.
- If attributing half the growth to these survey methodology changes, we would still have growth of 500% since 2002.
- **Growth rates** in the past 12 years **peaked in 2009 / 2010:** ETP numbers still rise, but more slowly.
- There remains a **north-south divide**, as in our earlier studies, with **the south (both south-east and south-west) 'abstentious'** (exception: Cyprus).



Quantitative importance of ETPs (2)

- Countries earlier leading still in top group, though changes in individual ranks
- The Netherlands twice no. 1 (2008; 2014) and once no. 2.
- Noteworthy: 'ETP power houses' are The Netherlands, the Nordic and **Baltic countries** and Switzerland, all of which are in the top 12 in 2014.
- Central-eastern Europe, with rare exceptions, in middle group.
- Germany, in relative terms, with lukewarm performance. France even weaker.



Main trends (1)

Level of study

- ETPs = graduate-level phenomenon: about 80 % of ETPs are Master programmes (unchanged from 2008; lower in 2002: 68%).
- Masters-level dominance strongest in BE, DE, SE and CH (over 90%), and weakest in Turkey (as already in 2008).

Subject areas

- top subject cluster: social sciences, business and law (36%), sciences (23%), and Engineering, manufacturing and construction (18%). Social sciences thus regained their leading position, which they had lost in the 2008 study to Engineering.
- Likely distortion through ISCED 2011 classification changes.



Main trends (2)

Age of ETPs

- Peak of ETP introduction in the years 2009 and 2010 (21% of all).
- 51% in the years since 2009 (49% until 2008).

Enrolment (warning: weak data)

- 44% of enrolment domestic (35% in 2008). Trend towards stronger domestic enrolment?
- Foreign enrolment in Masters higher than Bachelor.
- 17% of all students enrolled are from another EU/EEA state; 6% are from elsewhere in Europe.
- Asians make up 14% of ETP enrolment (4 %age points from China and India each); all other continents/world region provide 5% or less
- Sadly, still no enrolment from Martians and from inhabitants of outer space.



Main trends (3)

Babel?

- According to both programme and institutional coordinators, language-related problems are small and have further decreased over time.
- Of institutional and programme directors
 - ✓ 11% and 3% found that domestic students had deficiencies in English;
 - ✓ 18% and 8% found that foreign students had deficiencies in English;
 - ✓ 34% and 7% found that foreign students had serious problems with host country language (consistently biggest problem in all 3 surveys);



Famous last words....

No reason to be afraid of continental Europe, UK...

Study to be launched in January 2015.

www.aca-secretariat.be

Thanks for your kind attention.





Almost all in English: experiences at Rhine-Waal University, Germany

Joost Kleuters, Head of International Office

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Almost all in English: Experiences at Rhine - Waal University, Germany

- New public university of applied sciences (founded 2009)
- As of 2013-2014: 25 Bachelor degree and 8 Master degree programmes
- As of 2014-2015 winter semester: just over 5.000 students



Almost all in English: Experiences at Rhine - Waal University, Germany

-Most programmes (almost 80 per cent) taught completely in English. Not only Master degree programmes but also complete Bachelor degree programmes such as:

- International Business
- International Relations
- Sustainable Agriculture
- Mechanical Engineering
- Information and Communication Design



-Students from 93 countries, almost 30 per cent of student population is international

-International applications: Combination of English language and no tuition fees resulted in a remarkable increase in the number of applicants

Almost all in English: Experiences at Rhine - Waal University, Germany

Why teach almost completely in English?

- Use the opportunity when founding a new university
- Educating a skilled workforce in Germany
- Offering alternative study programmes to German students

Impact on internationalisation:

- A true international university (not a separate programme)
- Finding new international partners
- Internationalisation at home



Almost all in English: Experiences at Rhine - Waal University, Germany

Impact on teaching:

- Only professors with C1 language certificate and international experience or native speakers
- No cheating: international students are not required to speak German
- Cultural differences (for example between Chinese and US students)

Impact on the local community:

- Reviving the small towns of Kleve (Cleves) and Kamp-Linfort
- Language barriers, intercultural differences and enrichment



photo credit: https://www.flickr.com/photos/apophysis_rocks/1401368152/ Lynn (Gracie's mom) via <http://photopin.com> <http://creativecommons.org/licenses/by-nc-sa/2.0/>

Almost all in English: Experiences at Rhine - Waal University, Germany

Employment:

- Very good first experiences with graduates, both German and international
- Their choice of a new, unknown university has been rewarded
- Programmes in English provide a good preparation for the international job market



Marketing and selling UK Higher education in Europe

Thijs van Vugt, iE&D Solutions

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- Discipline interest in EU
- Push and pull factors in Europe
- Marketing channels
- Service levels
- Sales



- **Tuition fees**
- Student visa
- Professionalisation
- Increased competition

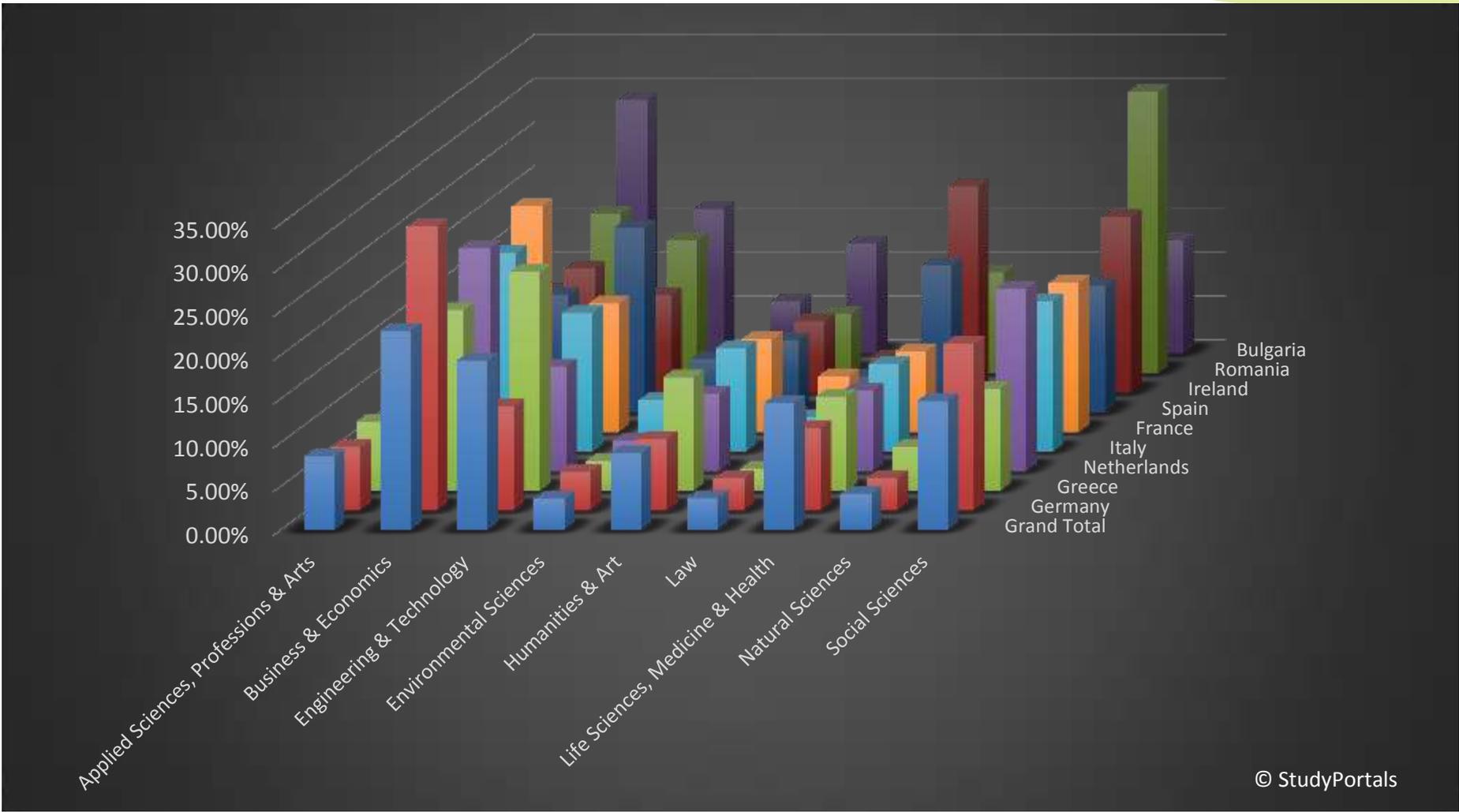


	THE ranking - # institutions in Top 200	total # institutions	% ranked in Top 200	EU fees	non-EEA fees
UK	29	123	24%	£ 9.000	£ 12.000
Netherlands	11	76	14%	£ 1.517	£ 10.000
Sweden	5	35	14%	£ -	£ 9.500
Finland	1	16	6%	£ -	£ -
Belgium	4	71	6%	£ 492	£ 492
Denmark	3	56	5%	£ -	£ 10.000
Germany*	12	420	3%	£ -	£ -
France	7	300	2%	£ 557	£ 557
Norway	1	73	1%	£ -	£ -
*GBP795 in Lower Saxony & Bavaria					

- Tuition fees
- **Student visa**
- Professionalisation
- Increased competition

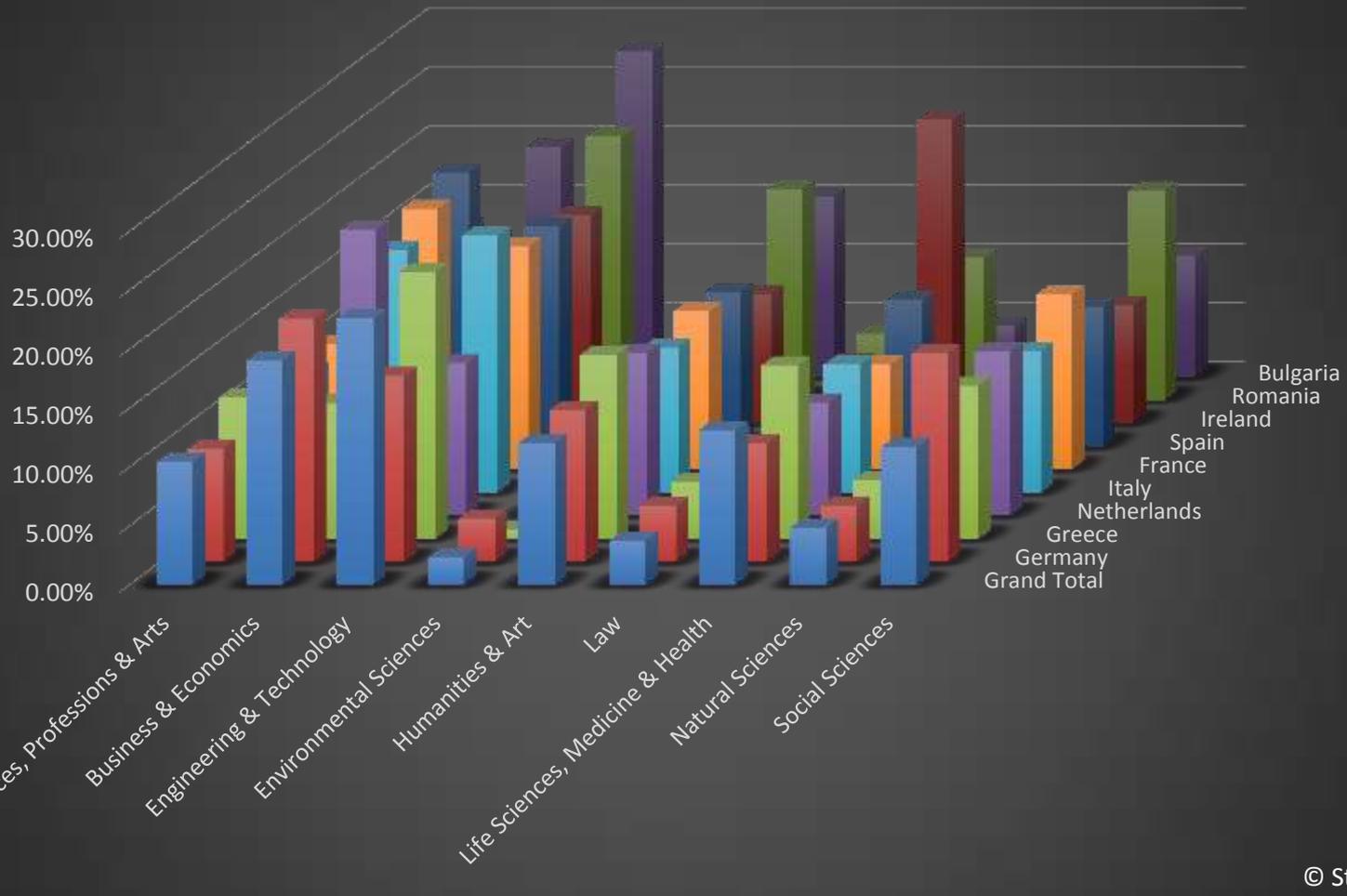
Comparison of immigration regulations			
	Average duration of Student visa / residence permit procedures (in weeks)	Cost	Work permit after graduation (in months)
Belgium			0
France		£ 58,00	
Germany	10	£ 143,00	18
Denmark		£ 180,00	6
Finland		£ 237,00	6
Netherlands	2,5	£ 240,00	12
Norway	8	£ 273,00	6
Sweden	6	£ 85,00	6
UK	2	£ 335,00	2

Discipline interest (master)



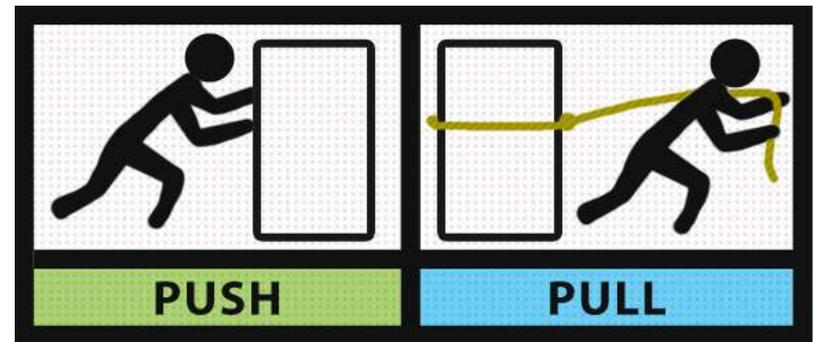
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Discipline interest (bachelor)



- Push for Eastern Europe:
 - ✓ Lack of good quality education
 - ✓ Poor economy with lack of jobs

- Pull for Western Europe:
 - ✓ Personal development
 - ✓ Top quality education



- In general what students want:
 - ✓ Value for money
 - ✓ Quality (of education and services)
 - ✓ Practical skills

HOW TO SELL EDUCATION

1



build trust

2



listen to the student

3



be open & transparent

4



use appropriate sales techniques

5



don't oversell or promise

6



don't put square pegs in a whole

7



follow up

8



allow time to decide

9



application submitted

Marketing vs CRM: service and sales

Marketing	CRM
Markets	Individual clients
Recruit	Retain
1 to N	1 to 1
Short term	Long term
Product life cycle	Customer life cycle
Transactions	Relations
Marketing dept	All departments

- Pick up the phone



- Listening:

- You have 2 ears and 1 mouth... use them in that proportion



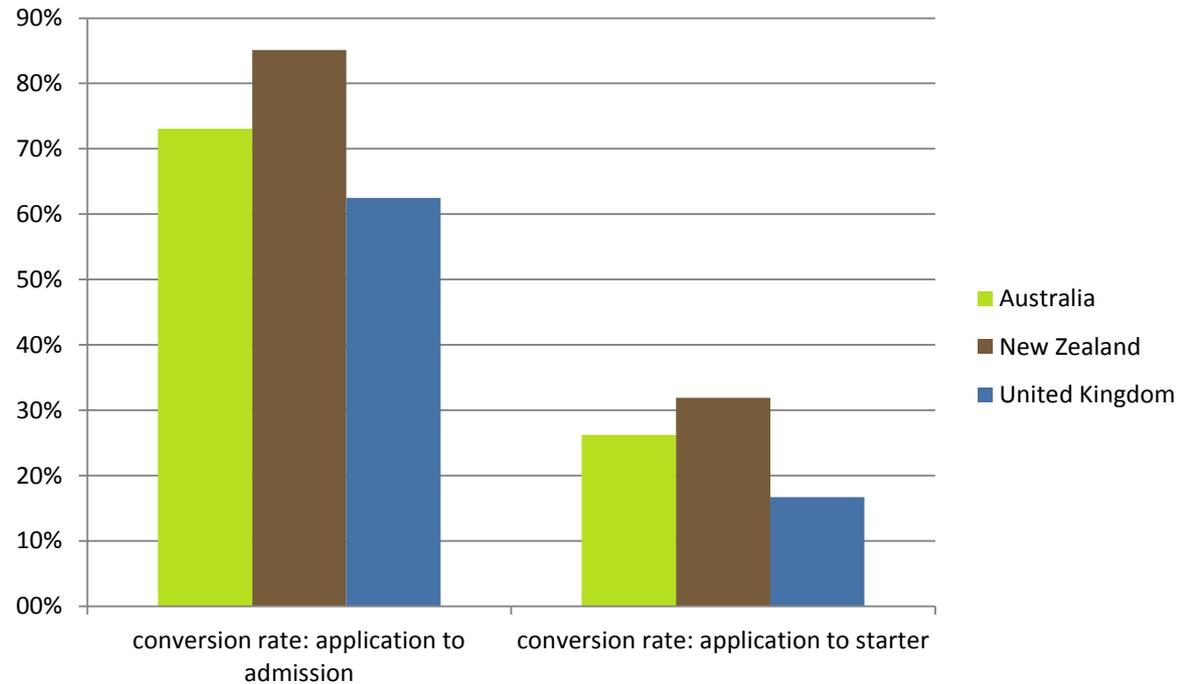
- Questioning: from open to closed

- Probing and funneling

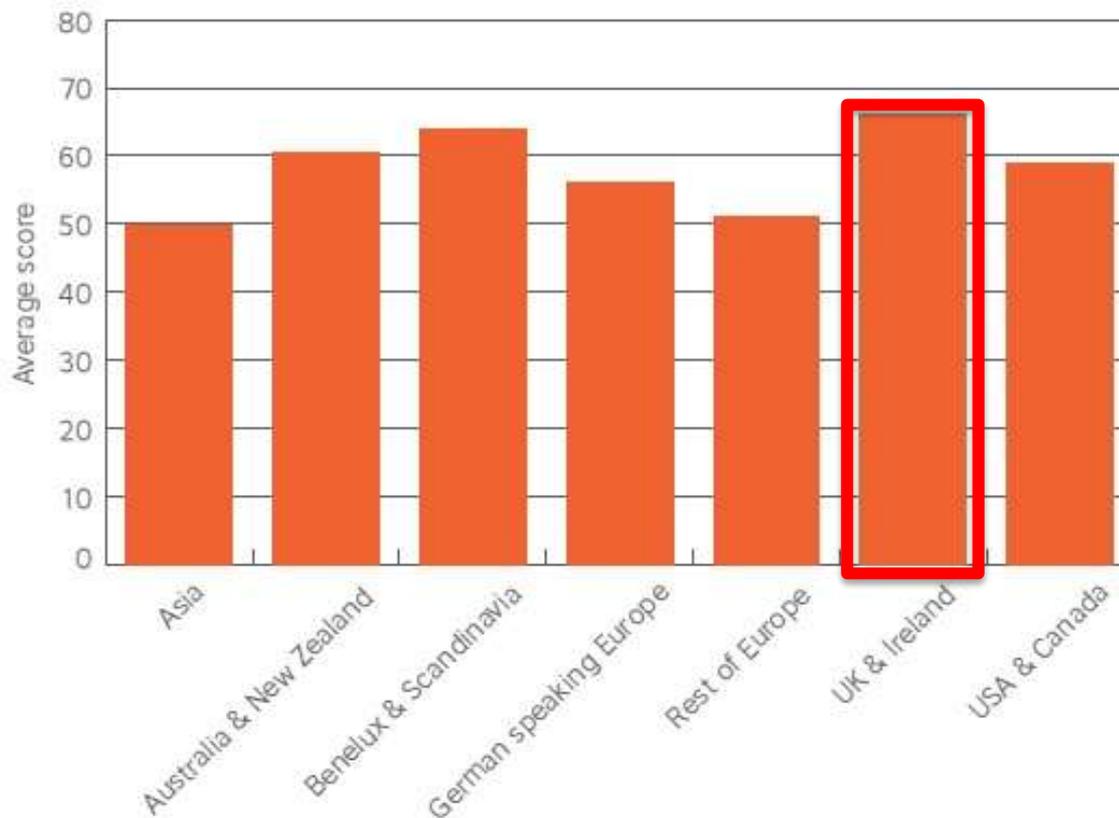
- Speed to contact: high speed can increase conversion 7 times (HBR)

- Responsiveness
- Empathy
- Tangibility

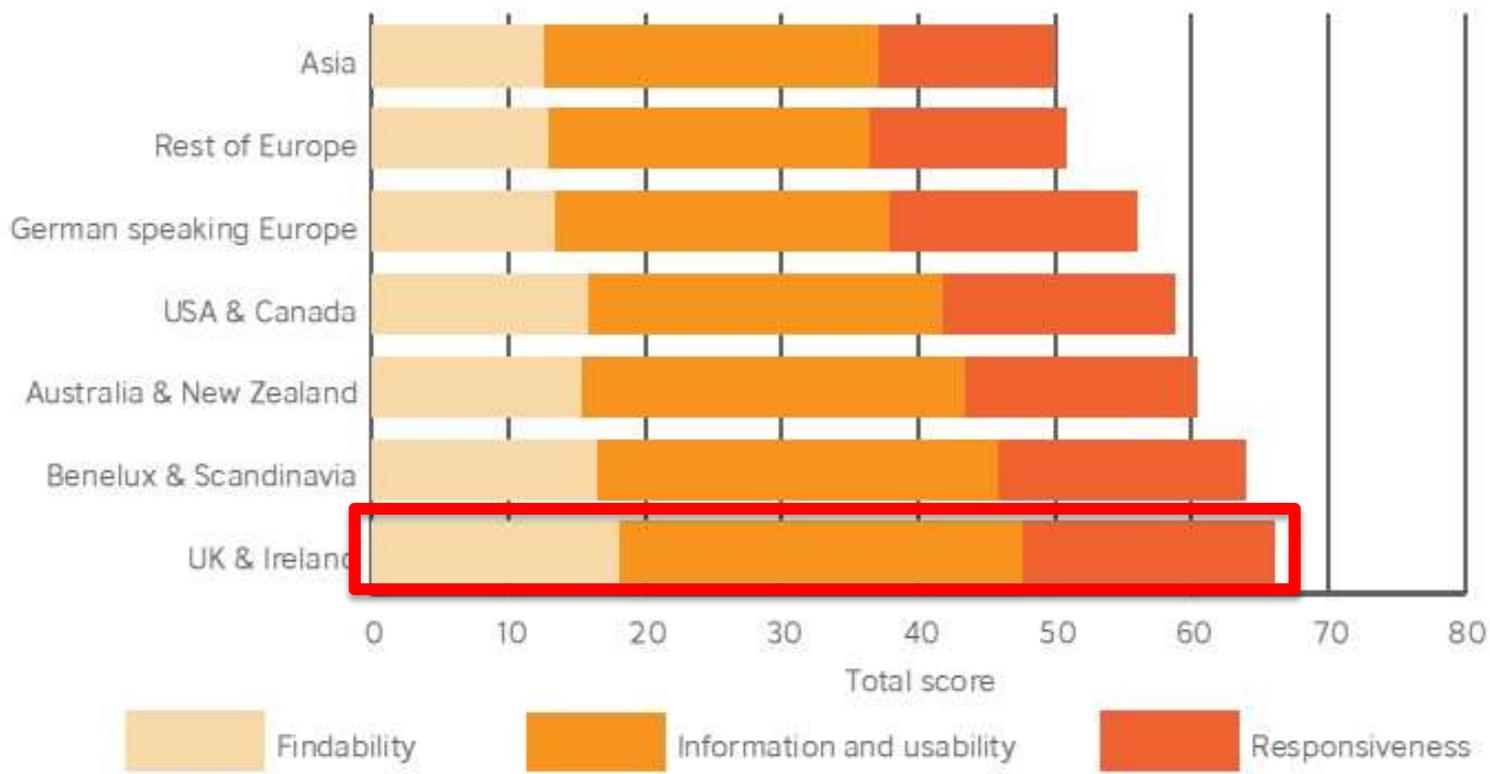
Conversion rates



Graph 1 - The average score of performance of institutions by regions

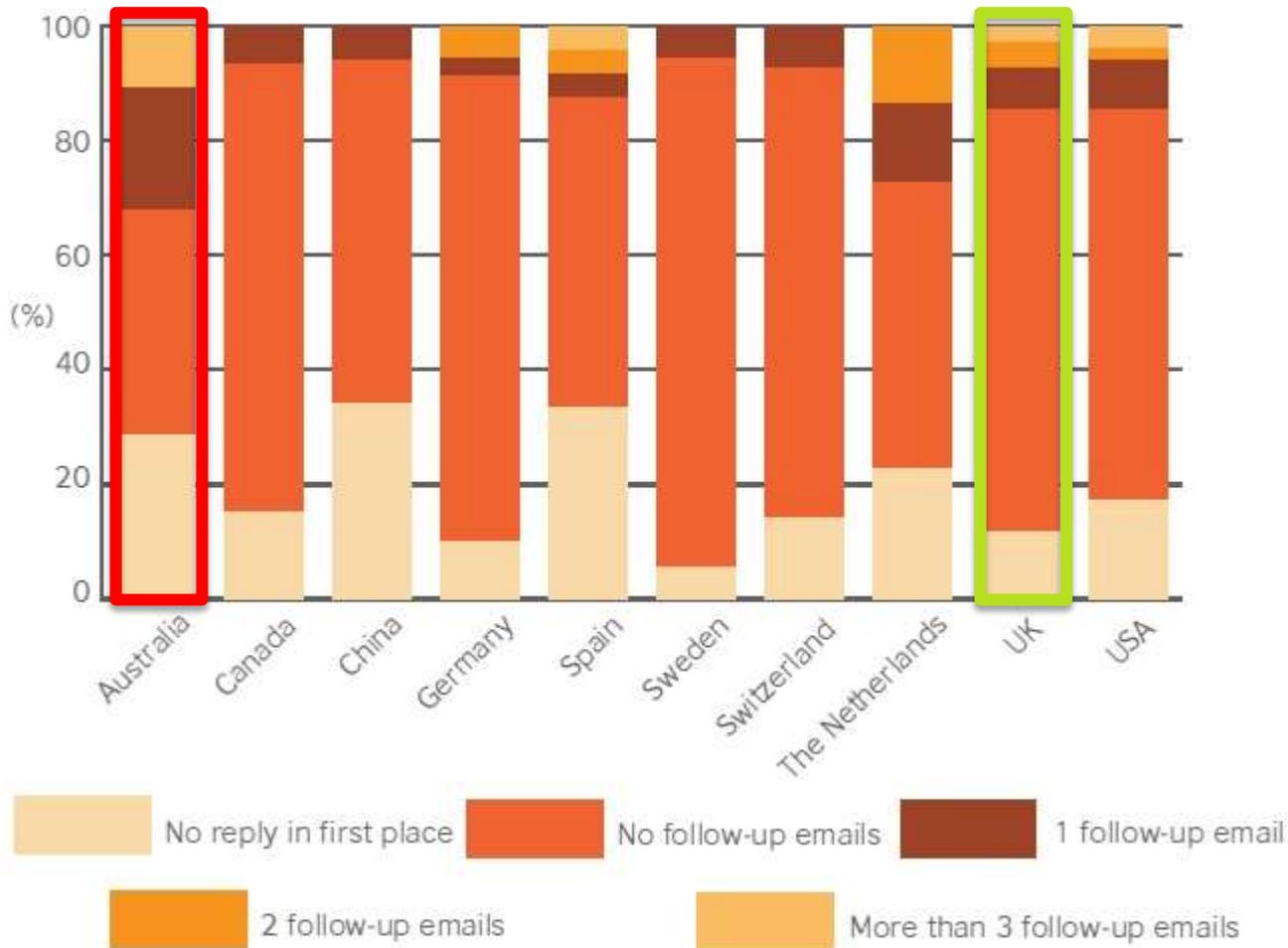


Graph 2 - Score breakdown by regions

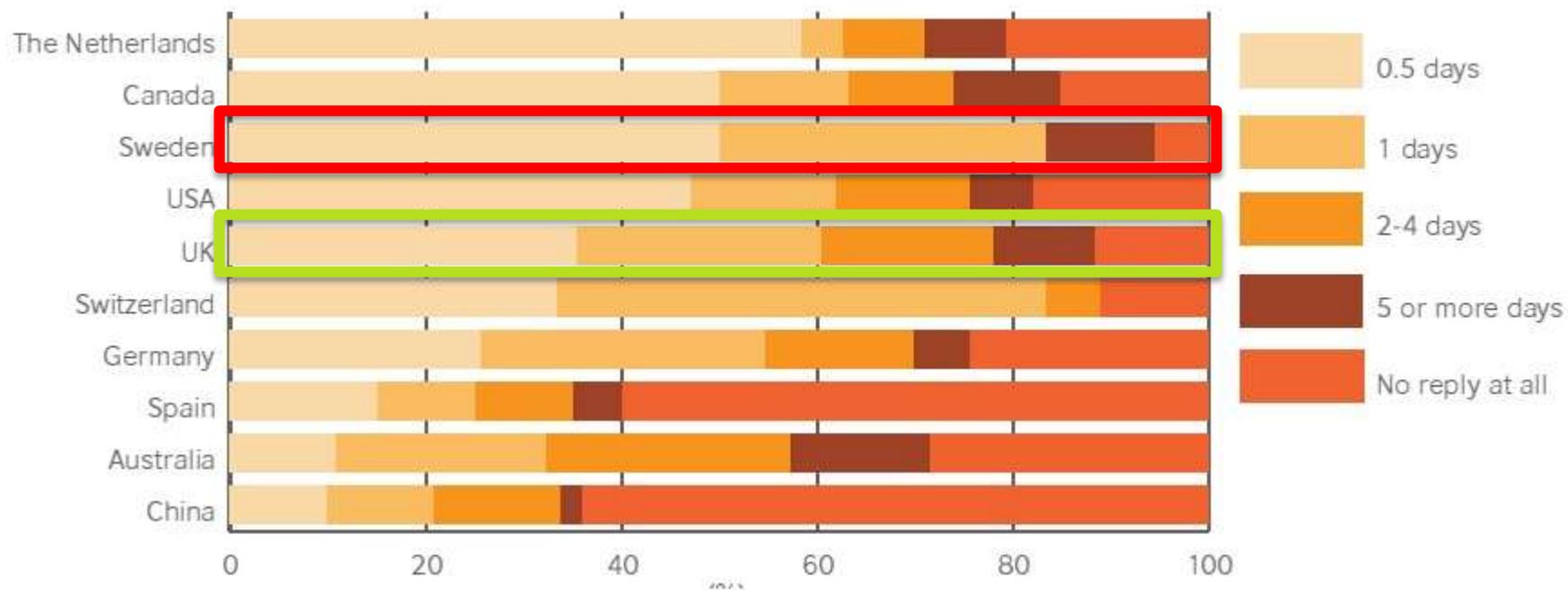


Top500 Benchmark: UK results

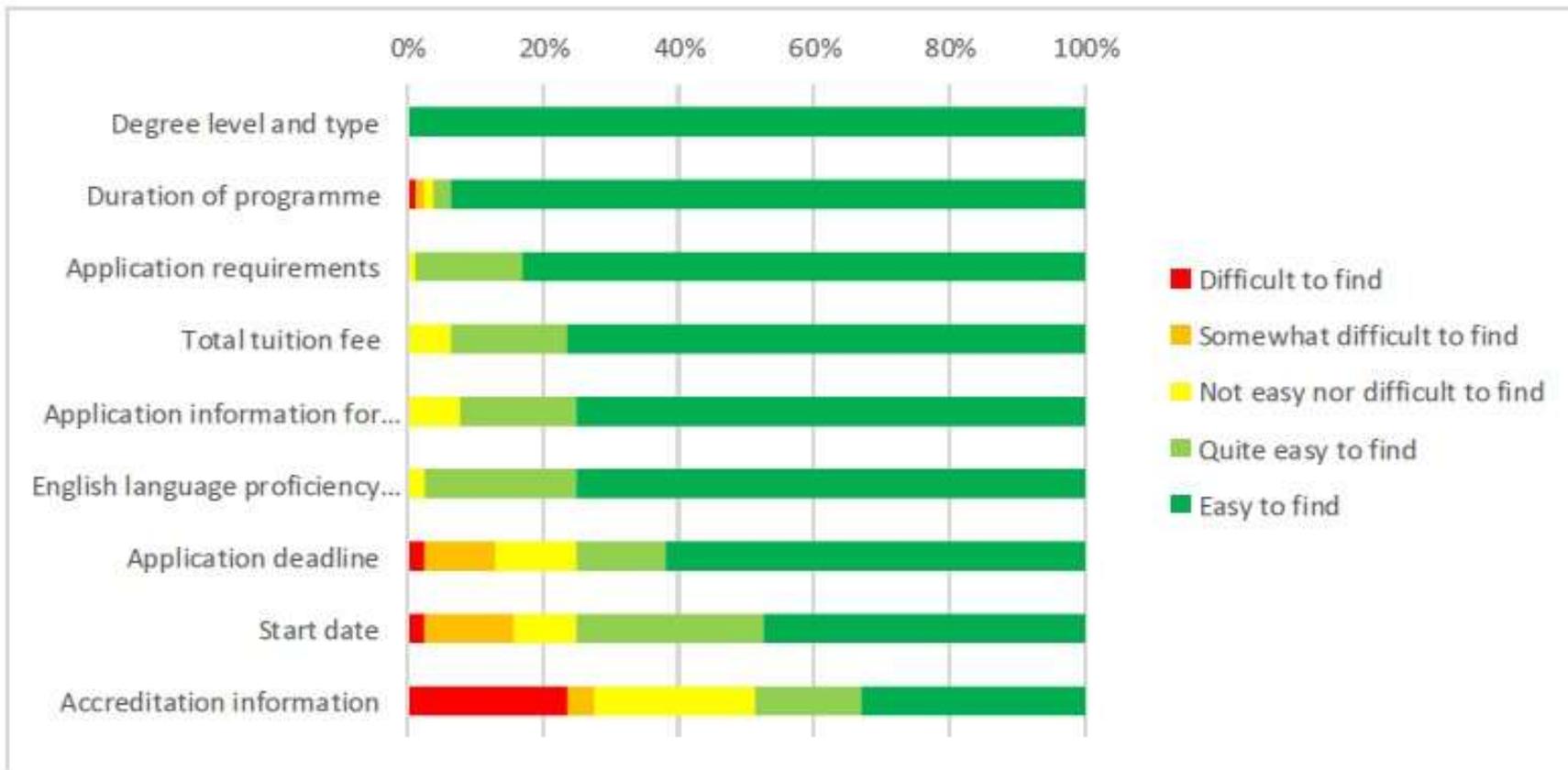
Graph 8 - Number of contacts with students



Graph 6 - Enquiry response time, by top 10 countries



Top500 Benchmark: UK results



- Agents
 - ✓ Mainly in Eastern Europe, e.g. Edmundo in Romania/Bulgaria
 - ✓ But increasingly interesting for Western European agents. However, students are independent and sophisticated
- Education fairs: are they still effective?
- Online: AdWords, FB, portals
- What should be your message?



- Increased competition:
 - ✓ Step up your service levels
 - ✓ Pick up the phone
- Communicate tuition fees and loan system more clearly
- Diversify marketing channels: less agents, more online
 - ✓ StudyPortals vs FindaMasters
 - ✓ Reach vs cost
 - ✓ UK vs global



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