

IRISH EDUCATED GLOBALLY CONNECTED

AN INTERNATIONAL EDUCATION STRATEGY FOR IRELAND, 2016-2020



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Ministers Foreword

Ireland is a small, open economy, reliant on international trade to build sustainable long-term growth. We are one of the most globalised countries in the world and compete successfully internationally on the basis of a highly-educated and talented workforce.

Ireland's worldwide reputation for high quality education is built upon a commitment to excellence. Our people are renowned for attributes such as innovation, creativity and collaboration. We are an English-speaking member of the European Union, and have extensive global links through our worldwide diaspora and alumni. Our education system has a long history of international engagement and is globally respected.

Ireland's commitment to education has ensured that we are home to nine of the world's top ten ICT companies, eight of the world's top ten pharmaceutical and life science companies, and half of the world's major financial services companies.

This Strategy aims to support the development of global citizens through Ireland's high quality international education system, by attracting talent from around the world to our education institutions, equipping Irish learners with the skills and experience they need to compete internationally, engaging in world-class research and international collaborations, and addressing global challenges.

The ambition of this Strategy is to build on the significant progress made in the area of International Education over the past number of years. My Department, in conjunction with the High-Level Group on International Education, have highlighted areas for growth and improvement and have put in place strategic actions to deliver the vision of this Strategy.

The international education sector is currently worth approximately €1.58bn per annum to the Irish economy and I have set targets for period of this Strategy to see this grow to €2.1bn per annum by 2020. I believe that, with the additional supports being put in place as a result of this Strategy, this figure is fully achievable.

This Strategy represents a key element of Ireland's growth strategy for the next five years.

Not alone does internationalisation of education bring direct financial benefits, but it also creates links and relationships between Ireland and many partners at individual, institutional and country level that will bring further engagement and economic activity in the future.

Today's international students are tomorrow's leaders, entrepreneurs and investors. By bringing them to Ireland to study, we have the opportunity to influence their future choices by demonstrating that Ireland can be a great place in which to invest and do business.

I would like to thank the High-Level Group for their time and effort, and I look forward to working with all of our partners to ensure that International Education in Ireland is a continued success.

Richard Bruton TD
Minister for Education and Skills





Executive Summary

Irish Educated, Globally Connected, an International Education Strategy for Ireland 2016-2020 builds on the significant progress made under Ireland's previous International Education strategy, *Investing in Global Relationships 2010-2015*.

Internationalisation of education can be described as a comprehensive approach to education that prepares students, academics and staff to be active and engaged participants in an interconnected global world. This new International Education Strategy for Ireland sets a vision that aims to achieve that outcome as well as aiming to attract leading international student talent.

The Strategy places a high quality learner experience, academic quality, research and mobility and a distinctive Irish offer at the centre of our delivery of international education.

International Education in Ireland is a success story. The 2010-2015 Strategy set the overarching objective of Ireland becoming internationally recognised as a world leader in the delivery of high-quality international education by providing a unique experience and long-term value to students. The targets set for full-time international student recruitment and economic impact were exceeded. Our reputation as a destination for students and the student experience is very strong.

Global Trends and Economic Value

Global competition in all aspects of international education is increasing. The dominance of English-speaking countries in the provision of education programmes is being challenged by non-native English speaking countries delivering programmes through the medium of English. Competitive pressure is also increasing in other areas of international education such as fee levels, immigration rules and employment opportunities. Disruptive technologies, new modes of delivery and transnational provision are transforming the landscape.

The analysis of the economic value of international students that underpins this Strategy will significantly support the development of policies and strategy for international education in Ireland. It clearly demonstrates substantial increases in the number of full-time international Higher Education and English Language

Training students choosing to study in Ireland in recent years.

The economic value of international students is measured on an output impact basis and shows that the sector is now worth a minimum of €1.55 billion per annum to Ireland, outperforming the very challenging target of €1.2 billion that was set in the last strategy.

This highlights the tremendous contribution that International education brings to our economy and society and the potential that further enhancements to our policies can create in this area over the next number of years.

Irish Educated, Globally Connected – Vision, Goals and Strategic Priorities

Building on all of the great work and achievements in recent years, our vision for international education is “to support Ireland to become internationally recognised for the development of global citizens through our internationalised education system and a market leader in attracting international student talent.”

This vision will be delivered through the achievement of a number of high level goals that reflect our aim of increasing the numbers of international students and researchers coming to our institutions, increasing outward mobility for Irish students and academics/researchers, connecting the benefits of internationalisation with enterprises in support of national economic ambitions and building world class networks of learning and innovation.

In pursuit of the overall vision and the high level goals, the Strategy establishes four strategic priorities through which the outcomes and targets are established. These priorities are-

- **Strategic Priority 1 – A Supportive National Framework**

Ensuring strong policy cohesion across related areas of Government Strategies and a strong regulatory environment that supports the objectives of internationalisation are central to this strategic priority. Taking a whole of Government approach to the alignment of a range of policies, initiatives and institutions underpins the achievement of the goals



and targets established. Links to the National Skills Strategy 2025, the forthcoming Foreign Languages Strategy, the Trade, Tourism and Investment Strategy and our labour market strategies are clearly set out and the implementation of this Strategy will take cognisance of related actions and objectives from those policies.

Reforming and enhancing the regulatory environment for international education providers and for students will also support the further development of our international education offering. Working with relevant Agencies and Departments on immigration, visa regulation, inspection and bringing forward legislation where needed will all serve to enhance the assurance that all participants in the sector will have as we continue to build the sector into the future.

- **Strategic Priority 2 – Internationally-oriented, globally competitive Higher Education Institutions**

Higher Education Institutions (HEIs) are the primary drivers of the internationalisation of higher education. The focus of our HEIs must remain on quality and building long-term engagement with students and partners. HEIs will continue to play to their unique strengths on the global stage, while ensuring that their individual internationalisation plans dovetail with national policy and ambition. They will also work in partnership at regional level, particularly where this enhances the prospects of market success in specific regions of the world. The strategic dialogue under the higher education performance framework provides a strong mechanism to oversee and monitor progress in this regard.

Opportunities and threats are present in relation to student recruitment, future funding of the sector, student accommodation and the mobility for students, academics and staff. The potential for transnational education and for greater internationalisation of the curriculum, underpinned by the principles of equality and diversity in the delivery of individual HEI strategies, must also be reflected in planning provision in the years ahead.

The internationalisation strategies of the HEIs will include the achievement of the goals, priorities and targets set out in this Strategy in their key elements of planning and delivery. These strategies will factor in the opportunities and the challenges presented in a

realistic manner while reflecting ambition in terms of their outputs and outcomes.

- **Strategic Priority 3 – Sustainable Growth in the English Language Training sector**

In recent years, the English Language Training (ELT) sector has performed very well on all indicators of revenue, student numbers and student weeks. A number of core growth areas have been identified for further development. In general, these can be categorised into specialised programme opportunities and specific product offerings. These programmes include those for academic or specific business purposes, while the products will feature opportunities for internships, pathways to higher education and teacher training courses.

Research has established that the inclusion of ELT in the broader international education package would improve the ability of our Agencies to sell Ireland as destination for international students. The future development of the ELT sector will benefit greatly from Government support and access to official branding and in-market promotion. It is proposed that the Education in Ireland brand will move to include the promotion and marketing of the adult non-EU ELT sector when appropriate improvements to the regulatory system are in place.

This Strategy also establishes growth targets for student numbers to 2020 that are challenging and ambitious, yet realistically achievable.

- **Strategic Priority 4 – Succeeding Abroad**

Education in Ireland and the Department of Foreign Affairs and Trade, in particular through its Embassy network, play a key role in identifying and building presence and concrete outcomes in international education markets. Along with the Department of Education and Skills, they will continue to grow links with other Governments and their agencies to create the right environment for collaboration for our institutions in overseas markets. They have been highly successful in assisting the building of long-term partnerships for our institutions and for Ireland in all areas of economic interest.

Supports, including those provided through the Irish Aid programme, have helped to build broader sustainable partnerships with partner countries.

While this Strategy will continue to support the deepening of existing market relationships and connections, it is proposed to also explore other high-potential market opportunities in a proactive manner. Education in Ireland and our Embassies will be central to this task and to the promotion of Ireland as a centre for human capital development to Governments, agencies, institutions and businesses where opportunities are identified. Allied to the further strengthening of the Education in Ireland brand, employing improved communications methodologies and building on Ireland's alumni and diaspora links, the scope for growing our international education outcomes is very substantial.

European Union, the UK and North-South co-operation

Ireland has had a special relationship and partnership at all levels of society and economic interaction with the UK since the foundation of our State. The Irish Government aims to maintain and protect that relationship and our connections to the greatest extent possible to the mutual benefit of our societies and economies. These connections are expressed in many deep and long-standing co-operations and collaborations between our HEIs and those in the UK. There are also strong and long-existing flows of students, academics, researchers and staff between the jurisdictions.

In light of the recent Referendum on the future of the UK in the European Union, negotiations on the future EU-UK relationship will now be required and the Irish Government will continue to emphasise our very particular relationship with Northern Ireland and the UK in these negotiations, a fact that is widely understood by our EU partners.

Recent years have seen the welcome development of considerable North-South engagement and cooperation on education issues. At institutional level, there is a broad range of cross-border collaboration particularly in research and innovation, which has been supported by EU funding programmes and national research funding programmes in Ireland. Each jurisdiction has sought to pursue internationalisation strategies relevant to their own priorities. There is increasing recognition of the potential for promoting a whole-of-island approach through joint measures intended to deliver mutually-beneficial outcomes and this should be explored further in the coming years.

Strategic Actions and Resources

In support of the visions, goals and strategic priorities set out in this Strategy, some 24 specific actions have been included to ensure that these are delivered on in concrete terms. These actions include a range of initiatives, targets, administrative enhancements and legislative changes that will enable Ireland to advance our internationalisation objectives at national, international and institutional level. They are outlined in detail in Part 4 of this Strategy.

The implementation of these actions will require further resources and investment in international education by Government and the sectors involved. The Government is considering the report on future funding of higher education and this will be important in terms of the resource issues raised in this Strategy. The resources for the new and additional initiatives identified for the Exchequer will be pursued through the Estimates process as the needs arise. The possibility for fee income in support of new regulatory systems and supports also offers some potential revenue to see the necessary funding come on stream.

Implementation and Monitoring

The actions to deliver on this Strategy involve all stakeholders, including Government Departments, State Agencies, education institutions and representative bodies. It is essential therefore that implementation takes place on a partnership basis.

The High-Level Group on International Education (HLG) will be responsible for monitoring overall implementation of this Strategy. A number of sub groups, responsible for driving specific actions, will also be formed. A formal review, led by the HLG, will take place mid-2018.



Consultations

The content of this strategy has been informed by:

- International student forums held by the Irish Council for International Students in 2013;
- Consultations with the Global Irish Network at the Third Global Irish Economic Forum, held in Dublin Castle on 4 and 5 October 2013, and the fourth Global Irish Economic Forum held on the 20 November 2015;
- A public consultation exercise, conducted in late 2013, which included engagement with relevant Government Departments and agencies, the Northern Ireland Department of Employment and Learning and key stakeholders;
- The Heads of Mission forum held in Dublin Castle on 13 January, 2015;
- The round table discussion, held in the Department of Education and Skills on 22 January 2015, on enhancement of Ireland-China education links;
- Consultation and feedback with The High Level Group on International Education in February 2015;
- Consultation and feedback with The High Level Group on International Education in November 2015.

A number of individual submissions were also received from the following:

- Irish Universities Association (IUA)
- Institutes of Technology Ireland (IoTI)
- Irish Council for International Students (ICOS)
- Marketing English in Ireland (MEI)
- Higher Education Colleges Association (HECA)
- Higher Education Authority (HEA)
- Quality and Qualifications Ireland (QQI)
- Science Foundation Ireland (SFI)
- Enterprise Ireland (EI)
- National University of Ireland, Galway (NUIG)
- Trinity College Dublin (TCD)
- Griffith College Dublin (GCD)
- University of Limerick (UL)
- National College of Art and Design (NCAD)
- Under Graduate Awards
- Association of Study Abroad Providers in Ireland (ASAPI)

PART 1

Review of Progress in Implementing *Investing in Global Relationships* Ireland's International Education Strategy, 2010-2015





Addressing the Strategic Actions from the 2010-2015 Strategy

Ireland's International Education Strategy 2010-2015 Investing in Global Relationships included ten strategic actions to enhance Ireland's performance in international education. The comprehensive consultation exercise undertaken in the preparation of this Strategy revealed a widespread view that major progress has been made in implementing these actions.

Extensive progress has been made in...

...Redeveloping the Education in Ireland brand and strengthening national promotion and marketing...

As part of the 2010-2015 Strategy, Enterprise Ireland took the lead in the development, promotion and marketing of international education.

The Education in Ireland brand has remained unchanged for the duration of the strategy 2010 - 2015. However the messaging around the brand has been developed.

The initial communications and messaging strategy was built around a friendly, safe, English speaking country, internationally recognised qualifications, supportive learning environments, innovative and creative culture, distinguished graduates leading in their fields and Ireland's position as a hub for multinational companies.

In 2012, the "Seven reasons to study in Ireland" message was introduced and the themes of employability, future career potential and the stay back option for students were developed.

This was refined further in 2014, with entrepreneurship, close ties to industry and world class research opportunities highlighted.

Marketing Collateral & Social Media to support the brand

The Education in Ireland brochures, websites and pages of websites are now available in a number of languages.

Promotional videos are now a regular feature of the marketing mix, with international students being placed centre stage, covering issues such as why they chose Ireland and what has their experience been. The Student

Ambassador Programme has been developed to support this with international ambassadors being appointed each year to write about their experiences in Ireland.

The marketing activity to support the Education in Ireland brand and the work that our HEIs are involved in, is customised to that international market.

The key messages of the brand are woven through its website along with a practical approach to answering all the questions international institutions, parents, students and the media have about studying in Ireland. In 2014, the website went mobile, with full access from most androids and smart devices.

Department of Foreign Affairs and Trade (DFAT) Support

The DFAT has been very supportive of the Education in Ireland brand across all the core and developing markets. The Heads of Mission in core markets play an integral role in the development of the brand and the execution of internationalisation plans. They work closely with the Enterprise Ireland and Education in Ireland teams to support the development of the brand and our HEI plans for their markets. It is a fantastic example of how, through a common goal, the international teams representing Ireland can work together overseas.

Core Markets and Market Advisors

The work done in 2010 to research and agree core markets for HEIs to focus on, and for the Education in Ireland brand to support, has led to a strongly targeted approach over the last five years.

Market advisors based in Enterprise Ireland have specific responsibility for core and developing markets and help support HEIs in-market. There is also a brand manager, who has the responsibility for the brand, the messaging, the website and ensuring that regardless of the medium used, the identity and message remains consistent.

...Ireland will enhance its performance through partnership and collaboration...

The High-Level Group on International Education has co-ordinated national policy and initiatives which are in line with wider national priorities under the Trade, Tourism and Investment Strategy.



International students attending the 2016 Student Ambassador Awards at Farmleigh

Collaboration between Team Ireland in core markets has improved under the Ambassador-led local market teams resulting in more effective market intelligence.

...Quality will be at the heart of Ireland's international education offering...

Quality is at the heart of Ireland's international education offering. A more restrictive list of eligible programmes for immigration purposes, consisting of degree programmes and quality English Language Training (ELT) providers has been introduced to protect the reputation of Ireland's education provision.

...Ireland's visa, immigration and labour market access policies will be strong and competitive...

Ireland's international education strategy and our immigration regime have become more mutually supportive. The Departments of Education and Skills and Justice and Equality have worked closely on a reform agenda aimed at ensuring that the sector operates to high quality standards, including in student protection and in immigration compliance.

A Student Taskforce on College Closures was set up in response to difficulties regarding the abuse of the immigration system in the ELT sector. This taskforce and our Embassy network worked together to ensure that affected students were accommodated and prospective students were kept informed of developments.

The Irish Naturalisation and Immigration Service and Garda National Immigration Bureau have been working on ways to streamline the registration process for students and an online appointments system has been launched.

...Ireland's higher education institutions will be globally competitive and internationally oriented...

Irish institutions have developed comprehensive internationalisation strategies that are linked with strategic goals and that have regard to national policies.

Further international partnerships have been developed by Irish Institutions with their partner institutions in core markets.

Institutions have developed a more comprehensive internationalised curricula, enhancing programme content and delivery, which is now more relevant for students.



... Ireland will develop targeted and relevant international education offerings...

Enterprise Ireland has identified a number of categories of prospective international students, based on profiles of values, desires, study interests, and age. Recruitment targets for individual markets now include targets for the types of student Ireland wishes to recruit.

Ireland's English Language Training (ELT) offering has continued to improve in order to stay competitive. In particular, more co-ordinated packages have been developed in the executive and corporate training sector areas.

...Government policies and actions will be consistent and supportive...

Government Departments and Agencies have engaged at political and senior official level with counterparts in partner-countries and in forums such as joint economic commissions and joint working groups to enhance the promotion of Ireland as a centre for international education. Enterprise Ireland and the Embassy network have also facilitated inward and outward visits that are of benefit to Irish educational interests. Enterprise Ireland, with the support of the Department of Foreign Affairs and Trade, has led over 80 overseas education missions and events to core markets since 2010.

The Government of Ireland Scholarship Programme has been introduced by the Higher Education Authority to increase linkages with core markets and the Ireland Scholarships managed by Fáilte Ireland has sought to target language teachers in important markets for the English language sector.

In support of national objectives, the Irish Research Council (IRC) and Science Foundation Ireland (SFI) have enabled collaborative research relationships between researchers in Ireland and researchers in partner countries.

...Ireland will strengthen its networks of influence...

Enterprise Ireland, through the Education in Ireland brand, and the Department of Foreign Affairs and Trade through its Embassy network, have played a valuable role in growing and strengthening Ireland's relationships in overseas markets.

Higher Education Institutions (HEIs), through their alumni offices and networks, have continued to provide the primary channel of communication with their alumni.

...Outward mobility by Irish staff members and students will be encouraged...

Irish HEIs have become more internationally oriented and have benefited through an increase in the outward mobility of Irish staff members and students.

While there has been an increase in outward mobility, more needs to be done to highlight the importance of increasing Irish attendance at world-leading institutions abroad as part of a move towards increasing two-way flows of staff, students and researchers. The delivery of the ERASMUS+ EU programme has supported mobility and exchanges for students, teachers, academics, staff and researchers.

...North-South and EU co-operation will enhance Ireland's international education performance...

There has been enhanced North-South co-operation in areas of mutual benefit and areas for increased co-operation have been explored by the relevant Departments, promotional agencies, and institutions.

There has been enhanced participation by Ireland and its institutions in European Union policies. This has been crucial to the development of internationalisation in the Irish education system and to enhancing the European identity and international outlook among Irish staff members and students.

PART 2

Towards a new International Education Strategy,
2016-2020





2.1 The Global context: Forces shaping Internationalisation of Education 2016-2020

This Strategy aims to build on the considerable progress that has been made over the last five years in the internationalisation of education in Ireland. International Education in Ireland is a success story. We have reviewed what has worked well and will work to sustain these achievements and, where possible, develop them further. However, it is clear that some areas require further attention and this Strategy examines these areas in detail and identifies strategic actions to enhance opportunities over the next five years.

What is Internationalisation of Education?

Internationalisation of education is a comprehensive approach to education that prepares students, academics and staff to be active and engaged participants in an interconnected global world.

According to the OECD, one of the main goals of internationalised higher education is to provide the most relevant education to students, who will be the citizens, entrepreneurs and scientists of tomorrow. Internationalisation is not an end in itself, but a driver for change and improvement¹.

Ireland's approach to internationalisation of education for the remainder of the decade will be shaped by global trends in the international education space and potentially disruptive technologies and changes in the mode of delivery.

Global trends, disruptive technologies and delivery modes

While Ireland has achieved much in the past number of years in internationalisation, there are still great opportunities for expansion and growth in the area of international education.

Ireland is one of the most globalised countries in the world. As an open, trading economy, our future prosperity depends fundamentally on our international connectivity and competitiveness. The Irish education system plays a key role in forging crucial global relationships and building international outlook and awareness. One of the core

ambitions of the National Strategy for Higher Education to 2030 is to support the development of "internationally-oriented, globally competitive institutions", and this is one of the seven national priorities set out for the higher education system.

Global competition is increasing as new entrants to the International Student market are making significant inroads and existing destinations are increasing their investment and attractiveness. The policies of partner Governments will have a significant influence on global mobility trends.

While these growth trends are expected to continue, the nature of globalised education is also changing rapidly, in ways which will have significant implications for traditional destinations for international students including Ireland.

Internationalisation is transforming education and research. In 2001 around 16% of research papers worldwide had cross-border authorship, by 2014 that figure had risen to over 25%². The number of international students doubled over the same period to over 4.3 million³ worldwide, fuelled in large part by demand growth arising from the development of the middle class in rapidly growing economies in Asia.

The dominance of native English-speaking countries is being challenged with over 25 OECD and partner countries offering higher education programmes through English⁴. Countries which have traditionally sent students abroad increasingly have ambitions to become international student hubs in their own right, including countries such as China and Malaysia.

A significant number of OECD countries have decided to offer international students the same fees as domestic students or to waive fees altogether because of their long-term strategic value or because of the needs of their economy. While tuition fees are not the only, or perhaps even the major consideration for many prospective students (they are more interested in quality and return on investment), they increasingly do matter: the OECD notes that the US's loss of market share could be attributable to high-quality, lower cost options being available elsewhere⁵.

A number of countries, especially those with large scale emerging skills shortages, are also adopting highly favourable immigration and residency conditions for international students. For example, Finland and Norway count periods of study towards eligibility for citizenship, and Canada permits permanent residence for international

¹ Approaches to Internationalisation and Their Implications for Strategic Management and Institutional Practice A Guide for Higher Education Institutions, Henard, Diamond and Roseveare, 2012

² Marginson, S. (2014) "The West's Global Hegemony in HE – Nothing Lasts Forever", *University World News*: 313 March 2014.

³ OECD (2013) *Education Indicators in Focus*: "How is International Student Mobility Shaping Up?"

⁴ OECD (2014) *Education at a Glance*

⁵ OECD (2014) *Education at a Glance*

graduates⁶. Marketing and promotion efforts are also being ramped up in a number of countries.

Emerging economies are investing significantly in their own education systems in order to drive up quality and capacity and this will increase the attractiveness to their own students of their domestic institutions compared with international mobility. In time, as their performance and capacity improve, these may also become regional competitors for international students. China, for example, expects to have 40% participation in tertiary education by 2020⁷.

A number of countries have had significant outward scholarship programmes, and Ireland has benefited from partnering with the countries concerned – for example, *Ciência sem Fronteiras*, the King Abdullah Scholarship Programme, Kuwaiti Ministry of Education Scholarships and Malaysian Government programmes.

Other policies such as portability of student support grants can also be influential in determining mobility patterns at both international and institutional level (e.g. US Federal Aid), and experience is showing that overseas scholarship policy changes can be decided and implemented in a relatively short time, with consequent negative impact on receiving HEIs.

In relation to opportunities in the ELT sector, in global terms, we can see that the use of English is ever-increasing. In its report in 2013, “The English Effect”, the British Council stated that by 2020 “2 billion people will be using it or learning to use English” and that “non-native speakers will outnumber native speakers by 4:1”. English is increasingly understood to be a driver of economic growth. In fact, in the same report, the British Council also says that “Countries with a low proficiency in English have uniformly low levels of exports per capita”.

It can be safely assumed that this is linked to the emergence of opportunities in new markets, principally in Latin America and Asia which are now considered viable ELT markets in terms of population numbers, visa changes and a growth in the numbers of people who can afford to and are motivated to travel and also to learn English. Specialised courses are growing which are based on meeting specific student need, generally for specific academic study or for a specific career, and Ireland is well placed with the quality product it provides to take advantage of this growth area.

Disruptive technologies and modes of delivery, particularly online and trans-national provision, are transforming the international education landscape.

As more students seek to stay within their country or region, cross-border provision of education has become an important trend in a number of countries, especially in Asia and the Gulf, and a number of Irish institutions have engaged in overseas delivery. Issues of cross-border quality assurance, return on investment and capacity in such projects are likely to come under greater international scrutiny in the coming years.

The extent to which new modes of delivery have the potential to disrupt the existing models of internationalisation is still open to considerable debate. While it is unlikely to eliminate demand for overseas study, it is likely to lead to greater choice and more diversity in the models used to educate international students, and offers considerable opportunities for relationship building through international partnerships.

⁶ OECD (2012) *International Migration Outlook*

⁷ Marginson, S. (2014) “The West’s Global Hegemony in HE – Nothing Lasts Forever”, *University World News*: 313 March 2014.



2.2 Trends and Economic Value of International Students

An analysis of the trends and economic value of international students was undertaken as part of the preparation of this Strategy. The analysis is attached as Appendix 1 and it is summarised here. It is informed by the work carried out by Crowe Howarth for the English Language Strategy under the aegis of Fáilte Ireland, the Department of Education and Skills and Enterprise Ireland.

The first part of the analysis outlines the recent trend in international student numbers in HEA-funded HEIs across categories such as EU and non-EU students, postgraduate and undergraduate programmes, institution type and domicile of origin and then details the student numbers in the ELT sector.

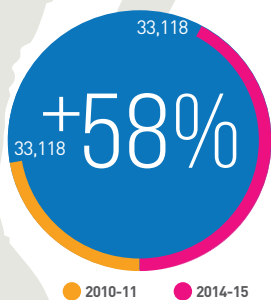
The second part details the incomes from international students across both HEA-funded and privately-funded institutes and the likely output impact of international students in Higher Education in 2014/2015.

International Student Numbers in Ireland

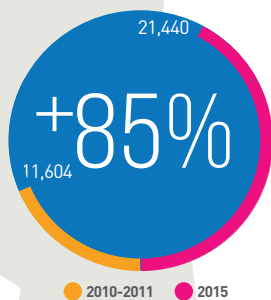
Public and Private Higher Education Institutes

In 2010/2011, 20,995 students attended publically and privately-funded Irish HEIs. This increased by 58% to 33,118 in 2014/2015. The increase over the period was primarily driven by increases in the non-EU student cohort, which increased by 85% from 11,604 to 21,440 (compared to a 25% increase in the EU student cohort).

Looking at the breakdown by level of study since 2010, the largest increase has been seen in the number of students at undergraduate level, which increased by 68% from 15,821 in 2010/2011 to 26,549 in 2014/2015. The numbers of postgraduate students also increased by 32% from 4,758 to 6,283.

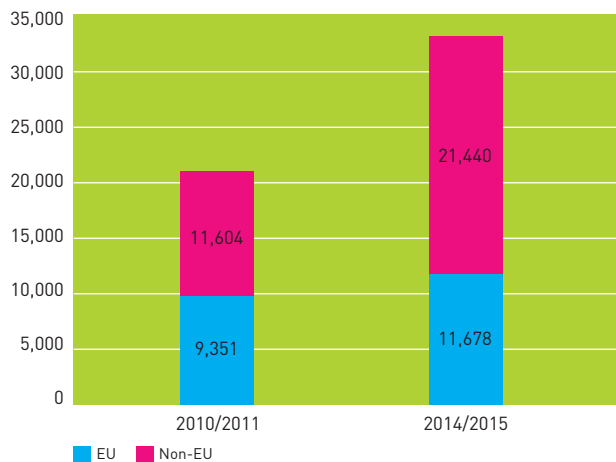


2010/2011, 20,995 students attended publically and privately funded Irish HEIs. This increased by **58%** to 33,118 in 2014/2015.



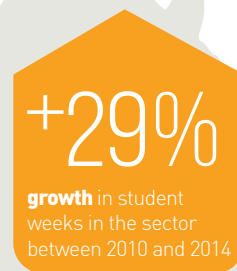
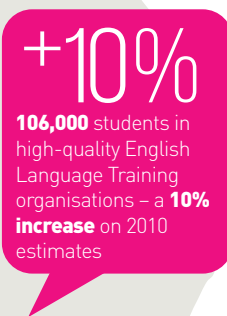
The non-EU student cohort, increased by **85%** from 11,604 to 21,440

Chart 1: Number of EU and non-EU Students in Higher Education. 2010/2011 and 2014/2015



English Language Training

In the English language sector, figures from the Study Travel Magazine, Global Market report indicate around 106,000 students in high-quality English Language Training organisations – a 10% increase on 2010 estimates. These reports also indicate 29% growth in student weeks in the sector between 2010 and 2014, suggesting that more students are staying in Ireland for longer periods.



Output Value of International Students in Ireland

The analysis presented comprises output from the International Higher Education and ELT sectors. The value of each sector includes direct, indirect and induced output impacts. The indirect and induced output impacts are derived from the CSO Input-Output tables. This measure of output is not to be confused with cost benefit analysis or other similar metrics or analysis. The figures are considered conservative as other outputs, such as output from friends and family visits or the level of research funding leveraged, are not valued as part of this estimate.e.

The direct economic output from international students to the Irish Economy in 2014/2015, is calculated by adding the fee income paid by both EU and non-EU students to the non tuition spend of these students studying in Ireland.

Tuition Fees from International Students in HEA funded HEIs

Applying the student contribution to the total number of EU students in full time courses in IoTs and Universities, the value contributed to education institutions was €9.75m and income from non-EU students is estimated at €177m⁸. Overall tuition income from international students is estimated at €188m with non-EU fees accounting for 94% of this income to HEA-funded IoTs and Universities.



EU students in full time courses contributed income €9.75m to HEI's



Income from non-EU students is estimated at €177m.

Tuition Fees from International Students in Private HEIs

Data provided by the Higher Education Colleges Association (HECA) indicates that total tuition income from international students was €29.6m in 2014/2015. This figure is derived by combining the number of students studying the full academic year (95% of students were enrolled for the full academic year) and the number of students studying for a semester only, multiplied by their respective average fees.



Total tuition income from international students in Private HEIs was €29.6m in 2014/2015

Non-Tuition Spend from International Students in Ireland

Overall monthly non-tuition spend by international students is estimated at €907 per month. Accommodation is the highest expenditure of all the non-tuition items considered at a median cost of €385 per month. The next most expensive items were; food and drink which cost the median student €151.67 per month and social activities which cost €108.33 per month. Shopping and other categories had a median cost of €86.67 and transport expenditures per month were €58.50. Students also pay visa and GNIB fees which are approximately €30 per month. In total international students in both private and public higher education spent approximately €182m in 2014/2015.



Non-tuition spend by international students is estimated at €907 per month.

⁸ Higher Education Authority



Output Impact of International Students in Ireland

Output Impact of Higher Education

The overall direct output of HEA-funded IoTs and Universities, together with privately-funded HEIs, in 2014/2015 was €401m. Applying CSO education input-output multipliers, the knock-on effects were €418m. The total output impact of HEA-funded IoTs and Universities and private Higher Education was €819m.

Output Impact of the English Language Training Sector

According to estimates informed by the Student Travel Magazine Global Market Report for 2014, the direct impact of ELT in Ireland was €390m in 2014/2015, this translates to €372m in knock-on output impacts. The total output impact of the ELT sector €762m.

Overall Output Impact of International Students

When all sectors are combined, the direct output of ELT, private Higher Education and HEA-funded IoTs and Universities was approximately €791m. The knock-on output effects (indirect and induced) of these sectors was estimated at €790m, making an output impact of €1.58bn⁹ in 2014/2015.

Growth Targets

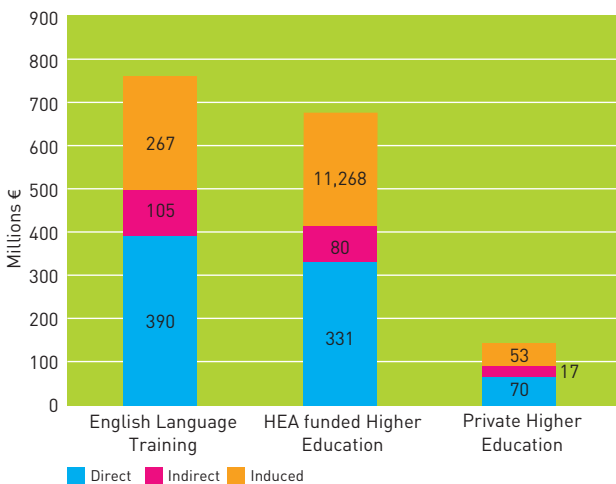
A growth target of 33% in the HE sector will result in an increase in international students in both public and private HEIs from 33,118 in 2014/2015 to approximately 44,000 by the end of the 2019/2020 academic year. In terms of the target output value for HE, the aim is to increase the output impact value from €819m in 2014/2015 to €1.15bn by 2019/2020.

The midterm targets for 2017/2018 are to increase the total number of students to 39,700 in public and private Higher Education Institutions. The output value midterm (2017/2018) target for the HE sector is €1bn.

A growth target of 25% in the ELT sector will result in an increase in ELT students from 106,000 in 2014/2015 to 132,500 by the end of 2019/2020 academic year. The aim is to increase the output value by approximately €200m from €762m to €960m. The midterm targets for 2017/2018 are to increase the total number of students to 122,000 and the output value to €885m.

In terms of the target output impact value, the value will increase from €1.58bn in 2014/2015 to €2.1bn by 2019/2020.

Chart 2:
Value of Direct, Indirect and Induced Impacts of Higher Education and ELT, 2014/2015



⁹ It should be noted that these figures are considered conservative because they don't include the potential visits by family members and the visa costs have been estimated at €360 per student which assumes a single entry (€60) visa plus the Garda National Immigration Bureau registration fee of €300 in 2013

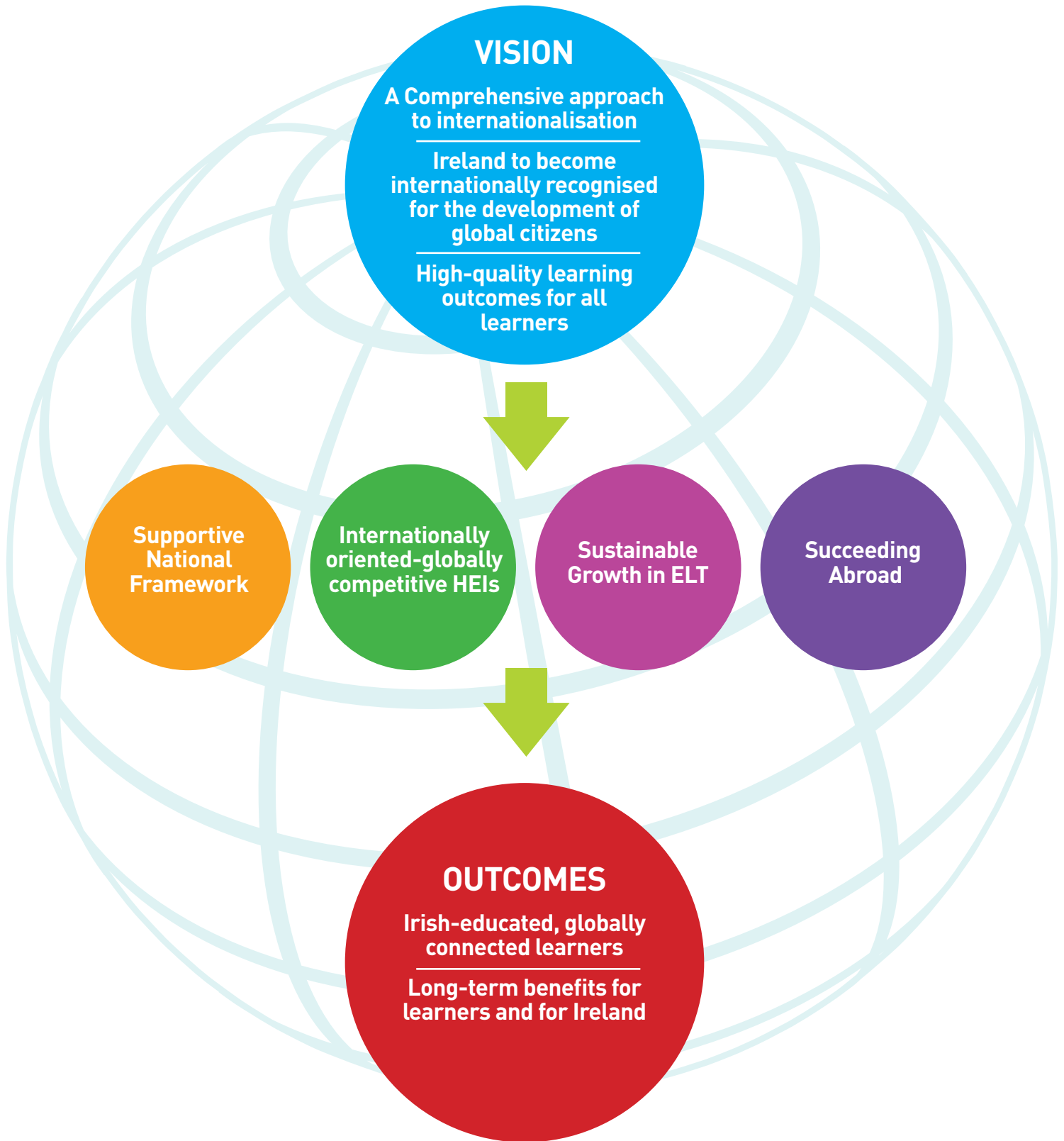
PART 3

Vision for an International Education Strategy,
2016-2020





3.1 Overview



3.2 Vision for Internationalisation of Education

Our vision is to support Ireland to become internationally recognised for the development of global citizens through our internationalised education system and a market leader in attracting international student talent.

We will deliver this through the achievement of the following high level goals-

- To increase the number of international students studying in Ireland
- To attract outstanding researchers to our institutions and to build research capacity and commercialisation of research
- To build world class networks of learning and innovation that can attract funding from outside the Irish education system
- To equip Irish learners with the skills and experience to compete internationally
- To have more Irish students integrate overseas experience into their study through maximising mobility opportunities for all
- To connect the benefits gained from internationalisation in education with enterprises to support the achievement of national economic ambitions
- To enhance our international alumni networks to build global connections for greater social and economic outcomes for Ireland at home and abroad

This Strategy is guided by the principles of the 2010-2015 Strategy and focuses on the following key objectives.

We need to provide a high-quality experience for all learners

The 2010-2015 Strategy made clear that quality should be at the heart of internationalisation. Indeed, it went further and indicated that quality should trump all other considerations: “internationalisation will need to be developed as a long-term and sustainable process, based on high-quality and balanced engagement with international partners. While there may be short-term

gains in quickly ramping up international student numbers, such an approach could damage our reputation for quality. Growth must not take place faster than the necessary supports can be put in place to ensure a high-quality experience.¹⁰”

Ireland has a natural competitive advantage as an English speaking country. In order to build on success to date and position Ireland as market leader, a thriving ELT sector which is coordinated and supported at a national level will support the enhancement of our reputation for excellence of experience and quality of provision in the ELT sector worldwide.

The Irish education system has in place strong quality assurance and strategic oversight mechanisms which should continue to ensure that increases in international student-numbers does not jeopardise quality.

As a strategic priority for the Irish higher education sector, internationalisation will be pursued as an inclusive and holistic strategy for the enhancement of the quality of the student-learning experience. HEIs should continue to ensure that all graduates are equipped with the skills and attributes required of global citizens by incorporating an international and intercultural dimension into their curricula.

We need to focus on academic quality, research and mobility as well as attracting international students

The growth in numbers of international students coming to study in Ireland has been substantial in recent years. This will remain a priority area for our international education strategy as we seek to grow existing connections and to build new markets and partnerships.

A strong brand and consistent marketing across multiple platforms, particularly in social media, is required if Ireland is to maximise the visibility of our proposition, in what is a very established market.

However, the success of international education in Ireland will be measured not only by how many international students we educate, but also in the quality and international renown of our academic offering and our research base, since international partnership-building is crucial to developing critical research mass, as well as to addressing global challenges.

Inward mobility cannot be the sole objective if internationalisation is to be realised as a sustainable

¹⁰ Department of Education and Science (2010) *Investing in Global Relationships: Ireland's International Education Strategy 2010-2015*



agenda which adds long-term value. Ireland's International education outward mobility policy should also be supported by promoting participation in EU programmes such as Erasmus+ and Horizon 2020.

The mobility of academic staff and researchers is an essential element in the creation of a truly international campus. HEIs should actively promote outward and inward mobility of staff, researchers and students to both EU and Non-EU programme and partner countries. In the absence of such external stimuli, Irish education would be in danger of becoming insular, complacent and non-competitive.

We need to develop a distinctive offer that incorporates intercultural aspects and enterprise engagement

The Irish higher education sector should offer a unique international education experience and should seek to provide a multicultural environment to enhance the delivery of the international campus experience.

HEIs should provide structured opportunities for visiting students and staff to complement their formal learning and research experience with the opportunity to share in the many features of Irish cultural life.

As society becomes more globalised, internships in firms engaged in the global market are a vital way to forge international connections and to provide people, not just with the skills and intercultural competencies that they require to succeed in 21st century economies, but also with the perspectives of engaged global citizens.

Ireland is Europe's most entrepreneurial country with a large exporting sector and is the European hub to over 1,000 leading multinational companies. Companies such as Google, Facebook, Pfizer, Apple, Intel, Genzyme and EA Games who require a skilled, educated and highly capable workforce to drive their success are located in Ireland.

Work placements in both multinational and domestic companies engaged with global markets have a key role to play in helping students to develop the practical work place skills required by employers. The National Skills Strategy 2025 has identified the importance of work placements and internships as a key mechanism in reducing the incidence of graduate mismatch. Our HEIs have very strong links to industry and this can bring real added value to future partnerships. However, HEIs should engage more with enterprise at a local level, with a view to the

development of programmes tailored to local enterprise needs as well as expanding work placement opportunities.

We need to ensure an ethical approach to Internationalisation

In addition to the off-shore campuses of Royal College of Surgeons in Ireland (RCSI) and University College Dublin (UCD), Irish higher education institutions offer a host of programmes in partnership with providers overseas. With 2,628 students registered on Irish programmes in campuses overseas in 2014/15, the target set in *Ireland's International Education Strategy 2010-2015* for an increase in the number of offshore students to 4,500 remains valid for the period to 2020.¹¹

The imperative for the adoption of an ethical approach to the internationalisation of higher education, and in particular to the development of transnational provision, is well established. Acknowledging the temptation for more advanced nations to view 'developing countries with weak regulation as mass markets for lower-cost learning', and 'to produce standardized products and generic content that are more easily and cheaply transferable across borders', Naidoo has warned that foreign for-profit providers offering courses in high-demand areas could under-cut indigenous universities whose more comprehensive offerings depend on internal cross-subsidisation.¹²

It is clear that balancing responsiveness to local, regional, and national needs with international competitiveness will continue to be required if internationalisation is to be approached in an ethical and sustainable way. This will mitigate any inequalities between the developed and developing world.

With regard to sustainable development goals in education, Ireland has had a long involvement in supporting and promoting education in developing countries. Historically this took place through missionary work, while more recently education forms a cornerstone of Ireland's Overseas Development Assistance programme, Irish Aid. Ireland's policy for international development, *One World, One Future*, highlights education as a basic right and part of our fundamental approach to fighting poverty and hunger.

Irish Aid will continue to focus on supporting quality primary schooling in developing countries. However, to ensure their education systems are ready to meet the demands of emerging labour markets and facilitate local

¹¹ DES, *Investing in Global Relationships*, 12.

¹² *Ibid.*, 50-51.

economic growth, Irish Aid will also support secondary and, where feasible, tertiary education programmes in these countries.

We need to support equality and diversity through internationalisation

Recognising that 'there are tensions surrounding the label "widening participation" in a globally competitive higher education sector, not least reputational risk when trying to recruit international students for prestige', the literature on 'internationalisation at home' calls for synergies between the internationalisation and equality and diversity agendas of institutions to be fostered as the basis for quality-enhancement¹³. The approach of our HEIs will continue to support the successful participation of the increasing diversity of students from within Ireland and abroad.

¹³ Viv Caruana and Josef Ploner, *Internationalisation and Equality and Diversity in Higher Education: Merging Identities* (London: Equality Challenge Unit, 2010), <http://www.ecu.ac.uk/wp-content/uploads/external/internationalisation-equality-diversity-in-he.pdf>, 8. See also David H. Hoffman, 'Internationalisation at Home from the Inside: Non-Native Faculty and Transformation', *Journal of Studies in International Education* 7/1 (March 2003): 77–93; Matthias Otten, 'Impacts of Cultural Diversity at Home in Crowther et al, *Internationalisation at Home*, 15–20; Bernd Wächter, 'An Introduction: Internationalisation at Home in Context', *Journal of Studies in International Education* 7/1 (March 2003): 5–11.



3.3 Four strategic priorities for an International Education Strategy

Strategic Priority 1

A supportive national framework

While individual institutions and clusters must be the drivers of internationalisation, supportive and cohesive Government policy and strategy is a crucial enabler of success.

It will be ensured that the actions required to be taken across Government to deliver this Strategy are integrated into relevant programmes and actions across Government Departments and Agencies.

Policy Cohesion

Taking a whole of Government approach allows further development and alignment of a range of policies, initiatives and institutions which are central to the achievement of the goals of this Strategy. Specifically, the Department of Education and Skills will continue to work in close co-operation with other Departments including Foreign Affairs and Trade, Jobs, Enterprise and Innovation, Transport, Tourism and Sport and Justice and Equality, to further develop Ireland's international education policy.

International education has a role to play in supporting Ireland in the development of key skills for the economy and in the achievement of a number of broad economic policy goals. The objectives and delivery of our International Education Strategy will be aligned with work that is already underway across the education and training system to develop other closely-related strategies. Some of the key strategies and policies supported by this Strategy include:

National Skills Strategy 2025 – Ireland's Future

A key element of the Government's strategy for economic and social development is to ensure that Ireland has the right skills to attract, retain and grow investment, job opportunities and the economy. Improving our levels of educational attainment makes Ireland a more attractive location for foreign direct investment as well as being a

driver for innovation and productivity and increasing levels of entrepreneurship.

Ireland's National Skills Strategy 2025 sets an overarching vision that "Ireland will be renowned at home and abroad as a place where the talent of our people thrives". The Strategy was developed in the context of significant reform in the education and training sector to ensure a more dynamic, responsive and high quality system that provides all learners with the knowledge and skills they need to participate fully in society and the economy.

In terms of the internationalisation of education, the Skills Strategy signals that the Irish education and training system plays a key role in forging crucial global relationships and building international outlook and awareness. It also underpins the role of mobility in creating those relationships and in developing language and other core skills.

Entrepreneurship policy

Ireland's National Policy on Entrepreneurship sets out key national objectives and initiatives to drive entrepreneurship in the coming years. The education and training system is recognised within this as making a key contribution. The Global Irish Economic Forum identified international student entrepreneurship in Ireland as an area with potential for more development¹⁴.

The Action Plan for Jobs sets out specific actions to sustain the rate of increase in new start-ups and entrepreneurship and sets a target to double jobs impact from start-ups by supporting survival and scaling of new businesses. The Government has made changes to the employment permit system to ease access by international graduates to positions on the highly skilled occupations list.

Universities and IoTs are significantly engaged in many programmes to support entrepreneurship via undergraduate, postgraduate and research incubator programmes and spin off companies, as well as ensuring that the entrepreneurial competences of all students are developed.

A number of our HEIs are involved in using the HEInnovate self-assessment tool for HEIs, developed by the European Commission and the OECD. In conjunction with the use of the self-assessment tool, the OECD has carried out a country-level review of entrepreneurship in higher education. This review will provide independent assessments of areas for improvement in the national framework and at the level of individual HEIs, together

with a set of recommendations for policy action by institutes and Government stakeholders.

The National Skills Strategy 2025, contains an action to complete an Entrepreneurship Education Policy Statement, and the findings and recommendations of the HEInnovate Country review will inform the preparation of this policy statement

Knowledge Transfer Ireland has successfully connected business and higher education research and this Strategy will link the important increases already seen in entrepreneurial activity to the output of the Higher Education Institutes.

Foreign Languages strategy

As part of the Government's Action Plan for Jobs 2014, the Department of Education and Skills is committed to developing and publishing a foreign languages strategy. The development of a foreign languages strategy is an important step in ensuring the development of the social, cultural and economic skills that we need.

Our future economic prosperity will continue to rely on maintaining and growing markets abroad. Achieving successful trade links in these markets requires knowledge of the cultures, economies and languages of those markets. To compete effectively in these markets, Irish business has identified the need to have the required language skills.

Foreign Direct Investment has also played a significant role in advancing Ireland's economic development over the past decades. In order to continue to compete effectively for foreign direct investment, we must continue to show that we have the talent and skills required, including language skills.

Supporting the Irish Labour Market strategy – the role of International Education

Job creation continues to be a major priority for the Government. Successful Internationalisation of education supports the creation and retention of jobs directly in the education sector, and indirectly through expenditure by international students in the wider economy. International students are a significant source of labour supply as they are permitted to access the labour market to support their studies. They can work up to 20 hours per week during the academic year and up to 40 hours per week during the academic break. International graduates of Irish HEIs are also permitted to work in Ireland post-graduation.

Highly skilled international students can contribute to Ireland's talent pool in areas of high skills and specific language demands. As part of this strategy, we will seek to retain high-calibre graduates to strengthen Ireland's talent pool. The Department of Education and Skills and the Department of Justice and Equality, in consultation with the Department of Jobs, Enterprise and Innovation, will look at how International students can meet the present skills and language needs, as identified by business, through the post-graduation permission provision and work permit system. Relevant proposals will be brought forward, as appropriate, arising from those discussions.

Trade, Tourism and Investment Strategy and the Export Trade Council

The Export Trade Council (ETC), chaired by the Minister for Foreign Affairs and Trade, was established in 2011 in order to strengthen cooperation and coordination across all Government Departments and State agencies involved in the promotion of trade, tourism, inward investment and education.

The ETC oversees the successful implementation of the recommendations set out in the Government Trade, Tourism and Investment Strategy, published in 2010 and reviewed in 2013.

The ETC provides a forum to ensure that Ireland's international education strategy is aligned with all other relevant Government and agency strategies, resulting in a cohesive Government approach to Ireland's promotion and development in markets abroad.

Through its work at home and across its global footprint of over 80 Embassies, Consulates General and other offices, the Department of Foreign Affairs and Trade has a core function of promoting Ireland's interests, including international education interests, overseas. As such, it will continue to work closely with the Department of Education and Skills and Education in Ireland in the implementation of this Strategy.

The promotion of Ireland's international education offering in foreign markets is inextricably linked to the promotion of Ireland as a whole. Messaging highlighting Ireland's attractiveness as a tourism destination, with a rich cultural heritage, vibrant and sustainable agricultural practices, full of innovative research and entrepreneurial talent, all contribute to the perception of Ireland as a worthwhile destination for study.

In core markets, local market teams, chaired by the Ambassador, draw together on a regular basis the



diplomatic and State agency representatives operating in the market, to coordinate their promotion of trade, tourism, investment and education services.

In addition to its broader promotional work, the Embassy network provides extensive support to visiting HEIs, particularly in core markets, and in many markets, where no dedicated Visa Office is present, the Embassy or Consulate General is a first point of contact for international students enquiring about immigration permission for Ireland. With support from the HEIs, and the benefits of a coordinated approach, the Embassy network is also well placed to develop Ireland's relationship with its overseas alumni, both Irish and international.

Investment in Excellence to support Ireland's competitive position in the International Education environment

A key element in the attractiveness of a country to international students is the excellence of its academic and research talent. This is an area in which Ireland has invested heavily and there is a need to enhance sector-wide visibility to better showcase that strength to an international audience.

Key initiatives that will be progressed during the period covered by the Strategy are as follows:

National Framework for Doctoral Education

QQI has developed the *National Framework for Doctoral Education* in conjunction with the HEA. QQI will work with the HEA in partnership with HEIs to implement this framework to maintain and enhance quality as the number of doctoral enrolments grows.

National Code of Practice for Doctoral Education

QQI appointed a panel of national and international experts to review existing policy and guidelines on the quality assurance of research degree programmes, and to develop a new Code of Practice. A *National Code of Practice* will be published, taking account of the expertise from the higher education and broader research sectors and also a review of international best practice.

Research and Synergies with innovation 2020

The Government provides substantial research funding to our HEIs via its research agencies, such as SFI, and the Irish Research Council (IRC) also provide funding to individuals to pursue PHD studies in our higher education institutions.

Attracting outstanding research talent to Ireland is one of our principal ambitions. Ireland is recognised as having a very open and transparent system for recruiting researchers and the recruitment of high calibre international PhD students and post-doctoral researchers will not only build our national research base but can also enhance our reputation as a centre of excellence for research. The Department of Education and Skills, in collaboration with stakeholders, will adopt a more cohesive approach to the recruitment of international research Scholars and Fellows.

Furthermore, to deliver on the vision of Ireland becoming a global innovation leader and reflecting the mobility of students as an effective way of diffusing knowledge, and while having regard to the objective of increased institutional diversity within the higher education (HE) system, ways to increase the number of non-EU doctorate students will be explored.

The Department will ensure that delivery on the challenges and actions set out in the new Strategy for Research and Development, Science and Technology, Innovation 2020, under the Education for Innovation Chapter will be monitored from the perspective of enhancing the internationalisation of education opportunities and outcomes.

Ensuring that a strong Regulatory Environment is in place in relation to International Education

Reforming student immigration procedures and the regulatory environment for providers is essential to the further development of Ireland's International education sector.

The Irish Naturalisation and Immigration Service (INIS) and GNIB have been working on ways to streamline the registration process for students and an online appointments system, online appointments system has been launched, has been launched.

The Departments of Education and Skills, and Justice and Equality, have worked closely on a reform agenda aimed at ensuring that industry operates to high quality standards, including student protection and immigration compliance. These reforms place a strong emphasis on quality operation and learner protection, and better reflect Ireland's strategic priorities in international education.

We cannot ignore the fact that significant difficulties have emerged in some parts of the education sector. There is a market for economic migration where non-EEA nationals

seeking access to the Irish labour market use the student channel as a means of doing so.

A robust regulatory environment is imperative not only to ensure that future development of the sector is on a high quality and sustainable basis but also in order to safeguard Ireland's reputation internationally. The reform programme has focussed on a number of key issues chiefly:

- Making learner protection compulsory
- A more restricted list of eligible programmes for non-EEA students (aligned with Ireland's international priorities: HE and quality ELT)
- Greater focus on governance and ownership
- Greater focus on educational outcomes
- Inspections
- Increasing the proportion of time a non-EEA student is required to spend in class

Provision for an International Education Mark (IEM) and Code of Practice for international learners is made under the Qualifications and Quality Assurance (Education and Training) Act 2012.

The IEM is being developed, and the required legislation will be brought forward at the earliest opportunity. The Code of Practice includes requirements relating to protection for enrolled learners, recruitment and admission, information provision, student welfare, cultural awareness and academic support provisions.

QQI will authorise the use of the IEM by providers where they can demonstrate compliance with the Code of Practice and any associated eligibility criteria specific to the acquisition of the IEM.

Together, the Code of Practice and the IEM, will be crucial tools for Ireland and its education institutions to underpin the quality of Ireland's educational offerings internationally.





Strategic Priority 2

Internationally oriented, globally competitive higher education institutions

Higher Education Institutions are the primary drivers of the internationalisation of higher education and national policy seeks to create HEIs which are globally competitive and internationally oriented.

While growth in international student numbers is positive, at both system and institutional level the over-riding focus must be on quality, long-term engagement and mission diversity.

The National Strategy for Higher Education to 2030 made clear that “higher education will accommodate a diversity of institutional missions that will be clearly articulated and defined. Together, the institutions will form a coherent and inter-related system”.

Institutions which will succeed in international education in the long-term are those that have a realistic international vision which is relevant to its overall mission, a clear proposition, commitment at all levels, and appropriate investment and support structures.

Strategic development

At national level, the Irish higher education sector will build its global competitiveness while also ensuring responsiveness to local and national needs and objectives. Ensuring that the national ambition ‘to create a coherent system of differentiated but complementary institutions’ dovetails with the internationalisation agenda, institutions will play to their unique strengths on the global stage while, at the same time, working in partnership at regional level, through the emerging regional clusters, to develop regional strategies to underpin engagement in different regions of the world.¹⁵

A ‘key system objective’ identified by the Department of Education and Skills in the *Higher Education System Performance Framework 2014–2016* is ‘to ensure that Ireland’s HEIs will be globally competitive and internationally oriented, and [that] Ireland will be a world-class centre of international education’;¹⁶ and the HEA’s *Higher Education System Performance First Report 2014–2016* provides an overview of the sector’s achievements in this area.¹⁷ As the organisation charged with the oversight

of the strategic development of the sector, the HEA has a central role to play in supporting the internationalisation of Irish higher education in partnership with a range of Government Departments and State agencies.

Within Ireland, the process of strategic dialogue between the HEA and HEIs provides a strong mechanism for overseeing and monitoring the internationalisation of higher education. The HEA will utilise this process to support institutions to adopt a holistic approach to internationalisation as a strategy for quality-enhancement. Internationalisation will be embedded in institutions’ strategic plans and across their core roles—teaching and learning, research and engagement—and institutions for whom it is a core priority will develop and implement internationalisation strategies which will advance their distinct missions. The National Forum for the Enhancement of Teaching and Learning will have a role to play in supporting this work.

Future Funding of Higher Education

The future direction of internationalisation policy has important inter-connections with the work of the Expert group on Future Funding of Higher Education.

International education has increasingly become a significant funding stream for HEIs as efforts to diversify funding sources to the sector grow. This mirrors a trend internationally where experience has shown the importance of not relying on a single source of funding. The contribution of international education to the overall sustainability of the higher education sector in Ireland in recent years is acknowledged, and it will be important that this contribution is maintained and enhanced over the period of this strategy. It is vital for the student experience and the reputation of institutions that sufficient resources are invested in programme delivery and student supports for international students. The development of an overall sustainable funding model for the higher education sector will be an underpinning enabler for our ambitions in international education and the recommendations of the Expert Group on Future Funding for Higher Education will be central to this.

Student Accommodation

The availability of on-campus student accommodation is an essential element of an institution’s internationalisation strategy.

¹⁵ HEA, Higher Education System Performance First Report, 23.

¹⁶ Department of Education and Skills, Higher Education System Performance Framework 2014–2016 (Dublin: DES, 2013), 2, <http://www.education.ie/en/The-Education-System/Higher-Education/HEA-Higher-Education-System-performance-Framework-2014-2016.pdf>.

¹⁷ See Higher Education Authority, Higher Education System Performance First Report 2014–2016 (Dublin: HEA, 2014), 20–21, 70–73.

HEIs report that international students demand guaranteed accommodation for at least the first year at time of recruitment. Continued increases in international student numbers, combined with the impact of increased domestic student numbers, will put further pressure on availability of student accommodation.

Given the rent increases that have occurred in recent years, the low supply of stock, the level of student households in the private rented sector and the projected increase in student numbers over the coming years, it can be argued that increasing the supply of on-campus student accommodation would go some way to relieving the pressure on the private rented market, particularly at the lower end of the market. This could potentially deliver real benefits for renters in the larger urban areas of Dublin, Cork and Galway and the commuter counties surrounding Dublin.

Data collected by the HEA shows that while there are substantial capital costs incurred by HEIs in the initial build of on-campus accommodation and in providing for on-going refurbishment, it can provide a sustainable income stream for the HEI over a the longer term which should be considered positively.

An Inter-Departmental Group on Student Accommodation has been established by the Minister to explore options for future student accommodation needs. The recommendations of this Group will be taken into account during the implementation of this Strategy.

Student recruitment

The recruitment of international students is a key component of the internationalisation strategy for the sector. International students enrich the culture of Irish campuses and have a vital role to play in supporting the international engagement upon which Ireland, as a small, open economy, relies, as well as providing an important source of income for HEIs.

Internationalisation processes in institutions will continue to be planned and delivered in line with the Strategic Dialogue process. These processes must take into consideration the realities around funding challenges, student accommodation issues and the projected growth in Irish student participation in higher education in coming years. Institutions internationalisation efforts shall not result in displacement of places for Irish students. Neither should they impair the quality of education or the student experience for international or Irish students.

The *Report of the Interdepartmental Working Group on the Internationalisation of Irish Education Services 2004* recommended that international students comprise 12%–15% of the student-population in the medium-term. The *International Education Strategy 2010–2015* set a medium term target for international students to represent 15% of full-time students by 2020.¹⁸ As reported in the Higher Education System Performance First Report 2014–2016, ‘the cumulative ambition of institutions suggesting that international students as a proportion of overall enrolment will rise from 6% in 2011 to 13% in 2016’.¹⁹ In 2014/15, 8.8% of all full-time students in HEA-funded higher education institutions were international students.

Within the national policy-context of increasing domestic demand for higher education, which is expected to rise year-on-year until 2027,²⁰ and of national targets for widening participation, it is agreed that the aspiration for international students to represent 15% of full-time students remains challenging but valid as a medium term goal over that period.

From a system perspective, it should also be acknowledged that institutions will approach internationalisation in different ways depending on their mission, capacity and strengths. When it comes to the 15% national goal for international students in the medium term, the level of ambition for Institutions will necessarily vary and individual targets will be reflected in the individual institutional internationalisation policies. Their policies should also take into account the diversification of their international students and specification of programmes in their international engagement and be discussed during the strategic dialogue process.

To this end, we will move towards the target of having international students represent 15% of our total student population, in accordance with international best practice, by increasing the numbers of international students in our HEIs by 33% by the end of the 2019/2020 academic year.

Mobility of students, researchers and staff

Opportunities for the mobility of students, researchers and staff of HEIs is also a crucial element of a modern, globally-focussed internationalisation strategy, at national and institutional level. Mobility brings significant opportunity and benefits for both the higher education sector as a whole and for individual institutions.

¹⁸ DES, *Investing in Global Relationships: Ireland’s International Education Strategy 2010–15*, 30.

¹⁹ HEA, *Higher Education System Performance First Report*, 70, 21.

²⁰ Department of Education and Skills, *Projections of Demand for Full-Time Third-Level Education, 2013–2027* (Dublin: DES, July 2013), 4. The Department predicts that by 2020 full-time student-enrolments will have reached 213,500—an increase of over 45,000 on the estimated 2012 enrolment levels.



The HEIs will also actively encourage staff mobility to programme and partner countries under the Erasmus+ and bilateral programmes as a key mechanism for the professional development of teaching, technical, management and administrative personnel and for the internationalisation of curricula.

The outbound mobility of students and staff, and the intercultural experience which this provides, is essential to the internationalisation of higher education. The European Commission's target of ensuring that at least 20% of those who graduate in 2020 undertake a study or training period abroad remains valid.²¹ In 2011/12, 10.14% of NFQ Level 8 graduates studied or undertook a placement abroad—a mobility rate which is in line with the European average and upon which the sector will build.²² Erasmus+ provides a strong mechanism for increasing outbound mobility.²³ We will aim to be ahead of the European average by 2020.

In support of national targets to widen participation in higher education, there is a particular imperative to support outbound mobility for disadvantaged students. Observing 'the already powerful social selectivity of international student mobility', van Damme notes that schemes, such as the Erasmus programme, 'fit young, full-time students from families who can afford the substantial surplus-expenses associated with living and learning in another country', and that, 'for the more affluent students, international mobility can become a competitive advantage in a higher education system in which 'massification' has diminished the number of avenues open to differentiate oneself on the market of credentials and qualifications'.²⁴ This is acknowledged in the Higher Education System Performance First Report, which identifies 'student finance (including reluctance to forego part-time employment)' as a factor that militates against international mobility.²⁵

The HEIs, the HEA and the Department of Education and Skills will examine mobility levels under ERASMUS+ to establish whether disadvantaged students are availing of mobility opportunities to the same extent as students in general and, if not, to establish the reasons for this and to explore solutions.

Engagement with the European Social Fund (ESF) as a mechanism to support the participation of socio-economically disadvantaged students in Erasmus+ will be explored as a mechanism for ameliorating this.

The Horizon 2020 programme will continue to support the mobility of Irish researchers, in particular through participation in the Marie Skłodowska-Curie actions, ensuring the international connectivity of the higher education sector. Under Erasmus+ opportunities exist, not only to provide international teaching and training experiences for Irish academic and support staff, but also to enable Irish HEIs to invite teachers and other staff from countries in many parts of the world to contribute to teaching on Irish campuses.

Transnational higher education provision

The growth of transnational higher education has been a major trend over the past decade, with the proliferation of joint programmes, the delivery of programmes overseas, and the establishment of branch campuses abroad.²⁶ While the majority of International Branch Campuses (IBCs) are affiliated with Western higher education institutions, a growing number are being established by emerging economies.²⁷ The Observatory on Borderless Higher Education has identified 'a shift in activity to the Far East, intra-regional "south-to-south" IBCs, niche campuses and the link between IBCs and the drive by governments to establish "education hubs" for national economic goals' as emerging trends.²⁸

In addition to the off-shore campuses of RCSI and UCD, Irish HEIs offer a host of programmes in partnership with providers overseas, and the British Council has identified Ireland as one of the 'top ten partner countries for co-operative education institutions in China'.²⁹

The further development of online programmes by Irish HEIs will represent another important strand of our transnational higher education provision in the years ahead.

²¹ DES, *Higher Education System Performance Framework*, 8.

²² HEA, *Higher Education System Performance First Report*, 71.

²³ See <http://www.eurireland.ie/news/joint-ireland-germany-traineeship-initiative-launched.2332.html>.

²⁴ van Damme, 'Quality Issues in the Internationalisation of Higher Education', 421.

²⁵ HEA, *Higher Education System Performance First Report*, 71.

²⁶ See Stéphan Vincent-Lancrin, 'Cross-Border Higher Education: Trends and Perspectives' in OECD, *Higher Education to 2030: Volume 2: Globalisation*, 63–88 (69–72); Christopher Ziguas, 'Extra-National Provision' in *Handbook on Globalization and Higher Education*, 114–128.

²⁷ See Cross-Border Education Research Team, 'Branch Campus Listing', <http://www.globalhighered.org/branchcampuses.php>, which identifies 282 international branch campuses around the world as at June 2015.

²⁸ See William Lawton and Alex Katsomitros, 'International Branch Campuses; Data and Developments: Abstract', (2012), http://www.obhe.ac.uk/documents/view_details?id=894.

²⁹ British Council, *The Shape of Things to Come: The Evolution of Transnational Education: Data, Definitions, Opportunities and Impacts Analysis* (2013), 64, http://www.britishcouncil.org/sites/default/files/the_shape_of_things_to_come_2.pdf.

The internationalisation of the curriculum

In a study undertaken by the OECD's Centre for Educational Research and Innovation (CERI) in the 1990s, internationalised curricula were defined as 'curricula with an international orientation in content, aimed at preparing students for performing (professionally and socially) in an international and multicultural context, and designed for domestic and/or foreign students'.³⁰ As Leask acknowledges, the 'internationalisation of the curriculum is a critical component of any university's internationalisation strategy'.³¹

Emphasising the importance of 'the international classroom', as 'a setting in which domestic and foreign students study together', as well as of 'a strong emphasis on interactive and collaborative learning processes' for the acquisition of the graduate attributes required for global citizenship, Van der Wende also highlights the importance of the Bologna Process and the international recognition of qualifications for the internationalisation of curricula.³²

The Irish Survey of Student Engagement (ISSE) provides a strong instrument for evaluating Irish HEIs' success in internationalising curricula and the student-experience. Open to first-year and final-year undergraduates as well as to taught-postgraduate students across Irish HEIs, the ISSE incorporates questions on students' engagement with online learning and with students of other ethnicities and nationalities, as well as on whether the study of foreign languages and a period of study abroad has been incorporated into the student-experience.³³

The internationalisation of the curriculum must continue to be emphasised and delivered through the HEIs' internationalisation strategies and monitored in the Performance Framework and Strategic Dialogue process.

The internationalisation of curricula across Irish higher education institutions will be enabled by the enhancement of the digital capacity of the sector, inclusive of the development of the capacity of staff for the delivery of technology-enhanced learning. The National Forum for the Enhancement of Teaching and Learning will continue to play a central role in supporting this.³⁴

Supporting equality and diversity through internationalisation

Higher Education Institutions will ensure that all students, including those domestic students who do not undertake a study or work-placement abroad, benefit from a high-quality international student-experience—an ambition supported by the fact that, in today's increasingly multicultural, mobile and globalised society, the distinction between the domestic and international students is becoming more blurred.

As Tinto has highlighted, integrating students into inclusive learning communities is key to improving student-retention and progression: he argues that students' prior knowledge and experience should be built upon in order to 'bring to the fore their understanding and actively engage them in a communal discourse of what they already know'.³⁵ This applies equally to the increasing diversity of students entering higher education at national level and to international students, making a compelling case for the 'collaboration between international services and equality and diversity services' advocated by the Equality Challenge Unit (ECU).³⁶ Arguing that internationalisation 'should not be an isolated strategic endeavour but an integral part of an institution's core operations', the ECU suggests that, through 'a commitment to providing an inclusive environment for all students, institutions can benefit from increased attraction, retention, progression and achievement of international students'.³⁷

The internationalisation strategies of the HEIs should ensure that equality and diversity are reflected as key elements in the planning and delivery of those strategies.

³⁰ Marijk van der Wende, 'Internationalising the Curriculum: New Perspectives and Challenges' in *Internationalising the Curriculum in Higher Education*, B. Hudson and M. J. Todd (eds), (Sheffield: Sheffield Hallam University Press, 2000), 25–38 (27).

³¹ Betty Leask, 'Internationalizing the Curriculum in the Disciplines—Imagining New Possibilities', *Journal of Studies in International Education* 17/2 (2013): 103–118 (103).

³² Van der Wende, 'Internationalising the Curriculum: New Perspectives and Challenges', 26–27, 36–37.

³³ See <http://studentsurvey.ie/>.

³⁴ See <http://www.teachingandlearning.ie/>.

³⁵ Vincent Tinto, 'Taking Student Retention Seriously: Rethinking the University of the Future', lecture at the Rossier School of Education, University of Southern California, 17th November 2003. See also John M. Braxton, Jeffrey F. Milem, and Anna Shaw Sullivan, 'The Influence of Active Learning on the College Student Departure Process: Toward A Revision of Tinto's Theory', *Journal of Higher Education* 71/5 (September–October 2000): 569–590.

³⁶ Equality Challenge Unit, *Joining up Agendas*, 1.

³⁷ *Ibid.*, 3, 1.



Strategic Priority 3

Sustainable growth in the high-quality English Language Training sector

Growth in the high-quality English language training (ELT) sector in Ireland in recent years has been identified as one of the “success stories” of the global industry³⁸.

A group comprising of Fáilte Ireland, the Department of Education and Skills, Enterprise Ireland, Tourism Ireland and industry groups, has developed a shared growth strategy to maximise the economic growth of the English language sector.

An economic impact analysis undertaken as part of the ELT growth strategy shows that approximately 106,000 individual students travelled to Ireland to complete an English language course in 2014. An analysis of the global and Irish ELT sector shows that, in line with the global pattern, the ELT sector in Ireland has grown during 2010-2014, and has performed very well on all indicators of revenue, student numbers and student weeks. In fact, Ireland’s growth in student numbers was one of the highest in comparison to our competitor ELT countries between 2010 and 2014.

Opportunities for ELT business growth

The ELT growth strategy outlines in detail the markets that present growth opportunities to the ELT sector.

Business growth opportunities have been identified as a result of primary research, secondary research and also consultation with the ELT schools. A number of core growth areas emerged across all sources. In general terms, growth areas can be broadly categorised as being in two main areas; firstly, specialised programmes (for academic or specific business purposes) and, secondly, “English +” (which can incorporate work experience/ internships or the addition of in-destination cultural learning experiences). The nature of specialised programmes and the in-destination learning experiences of “English +” gives Ireland an opportunity to differentiate, which is important given the trend towards standardisation of more general courses.

Some of the growth areas in terms of ELT products that were cited in consultation with ELT schools and agents are outlined below:

- Specialised programmes in both business English and academic English which is based on academic and career progression as a motivation to learn English;
- Internships i.e. English + Work Experience;
- Teacher Training courses on blended learning, e-learning and technology-led pedagogy;
- Erasmus + teacher programmes, an EU funded programme for 2014-2020;
- International foundation / pathway programmes;
- “English +” courses e.g. English + Rugby, English + Golf, English + Photography;
- Pathways to higher education;
- Shorter, more intensive courses.

Other opportunities that have emerged in the research related to delivery methods including online learning and blended learning/mixed mode instruction and Transnational Education (TNE).

Sales channel diversification, where online sales are becoming more prevalent resulting in more direct bookings and the need for a strong online presence, has also emerged as a growth area.

Future aspirations

The consultation process in the ELT strategy pointed to a real need for a clear and coordinated approach by all stakeholders in the ELT sector with clear connectivity to the HE sector in order to be able to sell Ireland as a destination to international students. The sector identified that there is an opportunity to view the ELT product as part of the broader international education package that Ireland has to offer.

The lack of a unified branding and approach to communications was mentioned in consultations as a contributor to a fragmented image that can create confusion for students and potential students.

Despite the fact that Ireland has a strong reputation in Europe as an ELT provider, it has been suggested by some

agents and schools that outside of Europe, especially within emerging markets, the level of awareness of Ireland can be low. These new markets will require investment in brand building to increase the visibility and awareness of Ireland with brand attributes that position Ireland as a preferred destination for English language learning leading to academic and career progression.

The growth inhibitor most often highlighted for the ELT sector is that while multiple bodies (State and non-State) are involved in individual markets, no one body is present in all markets and overall co-ordination does not reside with one entity. This has resulted in widespread opinions being expressed, by all parties, that there is a significant need for connectivity and co-ordination as a growth enabler.

In considering ways to encourage growth, a clear view has emerged that increased Government support and a robust growth strategy resulting in a more co-ordinated structure would be key contributors to ELT sectoral development and competitiveness. This view is supported in competitor analysis which shows that other countries involved in the provision of ELT either have moved or are moving towards having an integrated international education strategy, monitored by an oversight group with representation across Government Departments, State agencies and schools.

To address the above issues, as part of this Strategy we will work towards ensuring that Ireland's education offering will be promoted in a more cohesive way, with the ELT sector having access to national and in-market support. EI will take lead responsibility for the promotion of the non-EU Adult ELT sector in a similar fashion to their role in the HE sector once appropriate regulatory measures have been taken to strengthen assurance and protection for all participants in the sector.

As part of this Strategy, we will also adjust the Education in Ireland brand eligibility criteria to ensure that only quality ELT providers will be granted access to the Education in Ireland brand.

We will increase the number of students in the high-quality ELT sector by 25% from 106,000 in 2014 to 132,500 by the end of 2019/2020 academic year. We will increase the output value of the sector from €790m in 2014 to €960m by the end of the 2019/2020 academic year.

The implementation and monitoring of the outcomes and actions identified in the ELT growth Strategy that are relevant to this Strategy will be monitored by the High Level Group (or a sub group of) on International Education.





Strategic Priority 4

Succeeding Abroad

Much progress has been made on internationalisation within our HEIs over the course of the International Education Strategy 2010 – 2015. HEIs are moving at different paces and this new Strategy will accommodate this. The implementation of individual institutions' plans will support this Strategy and should be flexible enough to recognise their different stages of development.

Significant progress has been made to date and we will build on it to develop new strategies and routes to market.

We will keep under review our market opportunities and performance to build quality, sustainable and diverse market engagements to maximise the impact of our resources.

Enterprise Ireland, through the "Education in Ireland" brand, and the Department of Foreign Affairs and Trade, both at HQ and through its Embassy network, play a key role in promoting Ireland as an International Education destination.

Key elements of success in achieving growth in the international education sector include:

- Building long-term partnerships for Ireland;
- Engaging in core markets and new targeted opportunities
- Strengthening the Education in Ireland brand;
- Improving communication methodologies;
- Building on Ireland's alumni and diaspora links.

Building long-term partnerships for Ireland

Enterprise Ireland, along with the Department of Foreign Affairs and Trade and the Department of Education and Skills, will identify and develop links with other Governments and their Agencies in targeted overseas markets to ensure that the right environments are created and are in place to develop collaborative projects. In new and high-potential markets, Government-to-Government interaction is crucial to developing the market for Irish education services. EI will continue to find paths to

new and high potential markets, as well as building on existing relationships and partnerships in support of HEIs' activities. The Embassy network has a key role to play in this area. We will look at exploring ways to ensure that the In-Market teams are sufficiently resourced to effectively engage in our core markets.

Ireland has benefited significantly from its engagement in overseas scholarship programmes in recent years. A detailed review of scholarships being awarded by a defined set of new and high potential markets will be undertaken. However, an over-reliance on such programmes also has downsides, as these are operated in line with policies which are liable to change. A key focus in the coming years should be to use the opportunity afforded by participation in these programmes to develop broader sustainable partnerships which will outlast the scholarship programmes.

Irish Aid support for education is delivered through country programmes with key partner countries, through contributions to NGOs and multilateral organisations, and through the Irish Aid Fellowship Training programme.

The recently agreed Sustainable Development Goals, which will inform and influence Ireland's Overseas Development Assistance programme of the future, highlight the importance of continuing to support education throughout the globe.

Goal 4: Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all – and will ensure that education will remain central to Ireland's programme.

While much of the recent growth in international students coming to Ireland has been in non-EEA numbers, education and research links with European Union partners continue to be of vital strategic interest to Ireland. European students continue to form a significant cohort of students. This new Strategy will therefore take stronger account of Ireland's engagement in EU programmes to enhance education and research collaboration with EU partners. Up to 50,000 Irish students will benefit from the Erasmus + programme and Ireland has aimed to win €1.25 billion in research funding from Horizon 2020.

Engaging in core markets and new targeted opportunities

Under this Strategy, a review of the current system of prioritisation of education markets to assess the case for a more flexible approach will be undertaken. Such a review will take into account a number of new and high potential markets outside those currently designated as core markets for education.

Efforts outside of the core markets will be targeted, with EI and the Embassy network playing an important role in this regard. In the medium term, these efforts will be focused on positioning Ireland as a centre for human capital development to Governments, agencies and corporates in new and high potential markets.

In the interest of maintaining complementarity between the approach reflected in any new Trade Tourism and Investment Strategy and this Strategy, any new or revised market approach adopted will, where possible, maintain some degree of flexibility in prioritising markets in the international education area.

The current approach of focussing limited resources on a small number of core markets should not be to the detriment of fully pursuing opportunities in other markets, not currently identified as core.

Strengthening the Education in Ireland brand

The development of the Education in Ireland national brand, managed by Enterprise Ireland and supported by all higher education institutions, was a crucial development of the 2010 Strategy. The brand actively supports the internationalisation of education through in-market activities, inward missions, educational consultants in core markets and extensive marketing campaigns.

A strong brand and consistent marketing across multiple platforms is required if Ireland is to increase the visibility of our proposition in what is a very competitive field of well-established players – such as the UK, USA, Canada, Australia, Germany, the Netherlands, and New Zealand.

Only high quality institutions which are focused on delivering Irish awards will be permitted to access the Education in Ireland brand on the basis that Irish qualifications are considered to be a crucial part of the Irish educational experience. This gives strong reassurance to international students choosing Ireland as a study location.

Under this Strategy and the close alignment of the HEIs' internationalisation plans within it, a review of Enterprise Ireland's overall marketing support programme will be undertaken. Education fairs, market study visits, social media campaigns, website, inward visits, advertising, agent support, educational consultants and pathfinders in markets will be reviewed and realignment measures taken where required.

Education in Ireland will work closely with the HEI teams to develop a series of customised management and team development programmes that support Individual HEIs. EI will review the levels of support offered and the impact it is having in terms of overall economic impact and employment within the sector.

Improving communication methodologies'

EI, alongside the HEIs and other stakeholders, will develop a more structured and efficient communication methodology. A regular review of this needs to be undertaken at the High Level Group on International Education. Smaller focussed groups around specific initiatives or markets need to be developed further to ensure that opportunities are maximised for Ireland and for HEIs and to ensure that the lines of communication remain open between all stakeholders.

Building on Ireland's alumni and diaspora links

A core goal of this Strategy will be to contribute to creating long-term networks of influence for Ireland. Building more effective engagement with alumni and diaspora is therefore crucial to success.

At the Global Irish Economic Forum held in Dublin Castle in November 2015, a number of suggestions were made by the participants, which included Global Irish Network members, representatives of Irish HEIs and the Diplomatic service, on how best to engage with our alumni.

It is clear from the views at the forum that the relationship of institutions with their alumni is central but there is potential for greater national efforts in alumni engagement which can add value, while respecting the primacy of the institutional relationship.

The forum participants also felt that:

- Rankings of Irish Institutions and the quality of their education provision are very important to the perception of our HEIs by potential students, parents, academics,



researchers and investors abroad. This is also a crucial factor when trying to build alumni engagement with their institutions and in supporting the Education in Ireland brand in their location.

- Facilitating networking among local alumni as well as re-establishing active connection between alumni and their institutions still has strong potential and can still be enhanced through existing networks (such as Irish Network USA.)
- There is a strong need for HEIs to maintain data on their Alumni, which maps their specialities and location in order to create a framework for international alumni to serve as a source of undergrad/graduate internships, jobs, or other living/learning opportunities.
- Engagement with students at all stages, starting when they enter a HEI, is paramount to building the alumni relationship and can be a very powerful tool in gaining their future assistance in promoting the overall visibility and “presence” of their institution overseas.
- There is a need to find better ways to better ways to listen to existing students and recent graduates to build the alumni concept and to take advantage of their ideas and contributions.
- There is a need to examine how other countries deal with alumni and internationalisation of education policies. There may be some valuable knowledge and lessons to be harvested from a specific study of this area.

The Department of Foreign Affairs and Trade, and Ireland’s diplomatic missions overseas, have a particularly vital role to play in this agenda, working in partnership with the institutions and Enterprise Ireland.

Consideration should also be given to developing a tailored marketing effort to international alumni to scope out their interest in returning to Ireland to establish new businesses and a platform to enable networking in this area would be a useful tool. This would align with Enterprise Ireland’s efforts to attract overseas entrepreneurs to develop start-ups in Ireland.

More can be done to showcase Ireland’s offering to the diaspora. It was recommended at the Global Irish Economic Forum that groups of Irish or Study abroad institutions and Global Irish Network members should be invited to work in partnership to develop innovative summer schools offering Irish cultural and educational experiences to members of the Irish diaspora to encourage more young people with Irish heritage to

study in Ireland. To this end, the Department of Foreign Affairs and Trade, in collaboration with the Institute of Study Abroad Ireland and the UCD Clinton Institute, held the inaugural Global Irish Summer Camp in 2016 which welcomed 20 US high-school students from across 15 states to Ireland for the first time. The students had two weeks educational and cultural immersion in order to learn more about their heritage and what it means to be Irish today. This pilot programme will now be evaluated to assess the feasibility of a more extensive roll out of the programme.





3.4: Co-Operation with the United Kingdom and North/South Relations

UK-EU Relations and Co-Operation

Ireland has had a special relationship and partnership at all levels of society and economic interaction with the UK since the foundation of our State. The Irish Government aims to maintain and protect that relationship and our connections to the greatest extent possible to the mutual benefit of our societies and economies. These connections are expressed in many deep and long-standing co-operations and collaborations between our HEIs and those in the UK. There are also strong and long-existing flows of students between the jurisdictions for the purposes of higher education participation.

In light of the recent Referendum on the future of the UK in the European Union, negotiations on the future EU-UK relationship will now be required and the Irish Government will continue to emphasise our very particular relationship with Northern Ireland and the UK in these negotiations, a fact that is widely understood by our EU partners.

Whatever opportunities and threats that emerge during those negotiations will be actively kept under review during the implementation of this strategy and appropriate actions will be proposed and taken in response. This will be monitored under the structures proposed for the monitoring of the implementation of this strategy in Part 4, under the overall guidance of the High Level Group on International Education.

North-South cooperation promoting a 'whole-of-island' approach to internationalisation

Recent years have seen the welcome development of considerable North-South engagement and cooperation on education issues.

At Department level, senior officials from the Department of Education and Skills and the Department for Employment and Learning Northern Ireland meet regularly to review issues of joint concern including higher and further education strategies, funding, access issues, cross-border student flows and research.

At institutional level, there is a broad range of cross-border collaboration particularly in research and innovation, which has been supported by EU funding programmes and national research funding programmes in Ireland.

Each jurisdiction has sought to pursue internationalisation strategies relevant to national or regional priorities. However both share a common outlook on the increased competition for international students worldwide in a context where the international labour market is growing and employers are becoming more demanding for skills applicable in a global environment. There is increasing recognition of the potential for promoting a whole-of-island approach through joint measures intended to deliver mutually-beneficial outcomes.

In this context, it is recommended that authorities North and South explore the potential, taking account of relevant constraints including budget and visa policy in the respective jurisdictions, for initiatives at official, sectoral and institutional levels that will facilitate:

- attraction of greater numbers of international students studying at higher and further education institutions North and South
- international mobility of students and staff
- joint activities promoting the island as a destination for international students and staff; and
- development of institutional alliances and partnerships.

It is also considered that cross-border initiatives in this area would be greatly enhanced by the formal inclusion of higher education within the North South Ministerial Council framework, which will provide further momentum for joint policy and strategy development in this area.

All of the North/South initiatives above will be taken forward in the general context and framework of the negotiations on the outcome of the UK EU Referendum.

PART 4

Strategic Actions, Resources and Implementation





4.1 Strategic Actions

It is important that the key messages and outcomes identified in this Strategy are delivered in a coherent, structured manner with appropriate resourcing and oversight arrangements in place to ensure that they are implemented, monitored and reported on. The following strategic actions derive from the priorities identified in the previous chapters and describe how they will be implemented, resourced and reported on over the period of the Strategy.

Strategic Priority 1: A supportive national framework

	Action	Responsibility	Timeframe
1	Ensure that Ireland's International Education Strategy is aligned with other relevant national strategies and policies.	All relevant Government Departments	Ongoing
2	Ensure Ireland's International Education offering is underpinned by a robust regulatory environment in order to safeguard Ireland's reputation internationally. The International Education Mark will be developed and legislation enacted to enhance our quality framework for international education in this regard.	DES, DJE, QQI	2018
3	A more cohesive, strategic approach to the recruitment of international researchers and scholars will be examined.	DES, DJEI, SFI, IRC, IUA, IOTI	Throughout the period to 2020
4	A cost benefit analysis of internationalisation to both Government and Higher Education institutions will be conducted in consultation with relevant stakeholders to include an assessment of how best to improve the impact on the economy from international education. The analysis should also examine the jobs impact of international education and, if possible, arising from the analysis, jobs targets can be established.	DES, HEA	End-2018
5	The current 12 month stay back permission for international students will be amended to further incentivise high performing students to come to Ireland and to remain on after their studies, to meet the present skills and language needs as identified by business.	DES, DJE	By end-2016

Strategic Priority 2: Internationally oriented, globally competitive institutions

	Action	Responsibility	Timeframe
1	Internationalisation plans will be included in the overall plans of Higher Education Institutions and continue to be monitored through the strategic dialogue process.	HEA	Throughout the period to 2020
2	Higher Education Institutions will play to their unique strengths in delivering on their internationalisation strategies, while at the same time working in partnership through the emerging regional clusters to develop strategies to underpin engagement in different regions.	HEA, HEIs	Throughout the period to 2020
3	Higher Education institutions will progress towards meeting the medium-term target for international students to represent 15% of full-time students over the period of this Strategy in a manner that reflects their individual situation and national needs. An increase of 33% in international student numbers from 33,118 in 2014/2015 to approximately 44,000 will be achieved by the end of the 2019/2020 academic year. Therefore, the output value of the sector will increase from €819m in 2014/2015 to €1.15bn by 2019/2020. ¹	HEA, HEIs	Throughout the period to 2020
4	Staff-mobility to programme and partner countries under the Erasmus+ and non-EU bilateral programmes will be actively encouraged as a key mechanism for the professional development of teaching, technical, management and administrative personnel and for the internationalisation of curricula. We will examine the introduction of a specific fund to encourage the mobility of academic staff.	DES, HEA, HEIs	Throughout the period to 2020
5	Methods to increase the participation in the Marie Skłodowska-Curie actions within the Horizon 2020 programme will be explored to support the mobility of Irish researchers, ensuring the international connectivity of the higher education sector.	HEA, HEIs	Throughout the period to 2020
6	We will increase the numbers of those who graduate in 2020 who undertake a study or training period abroad to above the European average by 2020. A review of the number of grant holders as a proportion of Erasmus+ students (or the proportion of those who undertake non-compulsory Erasmus+ programmes) will be undertaken to see if disadvantaged students are adequately represented.	DES, HEA, IUA, IoTI, HECA	2020 2017
7	The recommendations of the Inter-Departmental Working Group on Student Accommodation will be taken into account during the implementation of this Strategy.	All Government Departments	Throughout the period to 2020



Strategic Priority 3: Sustainable growth in the high-quality English language training (ELT) sector

	Action	Responsibility	Timeframe
1	Recommendations, actions and outcomes from the ELT Strategy will be considered and progressed where appropriate.	DES, EI, DTAS, HLG Subgroup	Throughout the period to 2020
2	Enterprise Ireland, under the Education in Ireland brand, will assume the lead role in promoting the Non-EU Adult ELT sector in international markets.	DES, DJEI, EI	By 2020.
3	The number of students in the high-quality ELT sector will increase by 25% by 2020. The output value of the sector will increase from €762m in 2014 to €960m by the end of the 2019/2020 academic year.	DES, EI, DTAS, HLG Subgroup	Throughout the period to 2020

Strategic Priority 4: Succeeding Abroad

	Action	Responsibility	Timeframe
1	Increased opportunities for engagement with Governments and their agencies in targeted overseas markets will be explored to ensure that the right environments are created and are in place to develop collaborative projects.	EI, DFAT, DES	Throughout the period to 2020
2	A review of the current system of prioritisation of education markets to assess the case for a more flexible approach will be undertaken, taking into account the need for greater market diversity and a number of high-potential markets outside those currently designated as core markets for international education.	EI, DFAT, DES	End-2016
3	The Education in Ireland brand will continue to be strengthened to increase the visibility of Ireland's international education offering.	DES, EI	Throughout the period to 2020
4	Education in Ireland's overall marketing support programme will be reviewed and realigned to maximise opportunities in target markets, taking into account the different in-market country specific supports that are required.	EI, DFAT, DES	End-2017
5	A series of customised management and team development programmes that support Individual HEIs will be developed.	EI	Throughout the period to 2020
6	More structured and coherent communication methodologies will be developed to assist an enhanced engagement in overseas markets.	EI	Throughout the period to 2020
7	Existing networks (such as Irish Network USA) will be used to facilitate improved networking connections between alumni and their institutions.	HEIs, DFAT, EI	Throughout the period to 2020
8	The development of enhanced data on alumni, which maps the specialities and locations of international alumni, will be explored.	HEIs	By end 2017.
9	An examination of best practice on how other countries engage with and harness the assistance of their alumni will be undertaken.	DES, EI	End-2016
10	Developments in the Brexit process will be closely monitored, including through the work on the DES and other relevant Department's Brexit Contingency Framework and planning, and any actions needed to be taken in the context of the international education strategy will be brought forward and implemented as necessary.	DES lead, all relevant Departments and Agencies	2016 onwards



4.2 Resources and Investment

Arising from the findings of this Strategy and the strategic actions outlined in the previous section, there is a clear need for further resources and investment in international education to achieve the objectives of this Strategy. The resources and investments required are described in this section.

Resourcing and Investment to maintain the quality of offering and student experience

Due to the impact of the economic crisis and the resulting challenges in maintaining the levels of Exchequer funding to the Higher Education Institutions, coupled, in particular, with the rising strength of Asian universities on the back of increased investment by their Governments, Irish HEIs have become relatively less competitive in attracting international students over the duration of the 2010 – 2015 strategy.

However, there has been a significant increase in the economic value of International education to Ireland from 2010 to 2015. Higher Education Institutions need to be able to invest in services and resources for international students if sustainable growth in international student numbers is to be achieved. The question of increased funding for the higher education sector is being addressed through the Expert Group on the Future Funding of Higher Education. The proven ability of international education to produce a strong return on investment for HEIs and for the economy more generally underlines the argument for increased funding of the sector. Such increased funding would clearly enable better resourcing of facilities and capacity that could support further growth in the international education area.

Ultimately, for a sustainable international education strategy to work, institutions need Government-level support to maintain quality. Academic quality is obviously of paramount concern to high-calibre students, but student experience is also crucial.

International students are increasingly sophisticated in their decision-making, and expect a level of service commensurate to their financial investment. This means that internal processes – from recruitment and admissions to career services – must not only be effective, but be seen as internationally competitive.

Service provision to support international students is demanding, not least because of the distance those students are from their families. A properly resourced national funding system can support an effective internationalisation strategy but national investment is a critical precursor to international success.

Outward Mobility

Students

The importance of outward mobility of both students and staff as Institutions continue to internationalise is recognised. The Erasmus+ programme provides mobility grants for students and staff of Irish Higher Education Institutions to go on mobility and exchange programmes abroad.

In order to ensure maximum participation by all students in international mobility, it would be useful to establish the number of grant holders as a proportion of Erasmus+ students (or the proportion of those who undertake non-compulsory Erasmus+ programmes) to see if disadvantaged students are adequately represented. This exercise should be undertaken and its findings should inform actions to address any equality or equity issues identified.

We will also explore the possibility of co-funding from the European Social Fund for assisting the funding of any findings that emerge from this initiative.

Academic Staff

Academics need to be encouraged to visit their partner Institutions in both EU and non-EU countries in order to truly deepen our relationships in our core and high potential markets. A mechanism to incentivise staff to contribute more to the development of the enhancement of internationalisation related to teaching and learning, research and staff development and a sustainable range of international collaborations such as joint projects, student and staff exchanges including the collaborative provision of academic and training programmes must be considered. An initial fund to cover accommodation costs and expenses should be set up to allow for Academics to travel to and collaborate in our core and high-potential markets. Participation in such international mobility will contribute to the enhancement of teaching quality across the sector, providing academics with high-quality pedagogical support. This should also act as a catalyst for HEIs to provide for further mobility opportunities for academic staff from their own resources.

More flexible approach to markets

Under this Strategy, a review of the current system of prioritisation of education markets to assess the case for a more flexible approach will be undertaken. Such a review will take into account a number of high-potential markets outside those currently designated as core markets for education.

Efforts outside of the core markets will be targeted, but there will be resource implications if we are to engage in new markets.

In this regard, Education in Ireland will need to be further resourced for us to compete in new markets, which will result in an increase in the number of market advisors and in country pathfinders, to enable us to effectively explore opportunities in identified markets.

Higher Education Institutions will need to be resourced at a level to engage in a wide range of activities in the new markets that the strategy recommends. Our HEIs have indicated that they do not have adequate resources to engage in our present core markets and an increase in engagement in new markets will need to be funded appropriately.

The Embassy network will need to be effectively resourced to engage with governments in these new markets where resources are not presently in place for them to do so.

English Language Training Sector

The recommendation that Ireland's educational offering is promoted in a more cohesive way, with the ELT sector having access to in-market support such as promotion and Embassy assistance will have resource implications. The promotion of the Non-EU Adult ELT sector by EI will require additional resources to fund a market advisor and new in country pathfinders.

Alumni

Building and deepening relations with the alumni of Irish third-level institutions is important in terms of connecting with Irish graduates overseas and connecting with non-Irish students who may retain some affinity with Ireland. Such links have enormous potential, for Irish third-level institutions and for the country as a whole.

The Government's Diaspora Policy, 'Global Irish', recognises the importance and benefits of connecting with

Irish graduates overseas as well as non-Irish graduates who may retain some affinity with Ireland. The Department of Foreign Affairs and Trade will therefore launch an Alumni Challenge Fund to provide seed-funding to new collaborative initiatives by Irish institutions to target their Irish and non-Irish graduates working internationally. This fund will also be developed in line with the objectives of the International Education Strategy.

Scholarships

In terms of supporting the continued growth of international student-recruitment, the provision of scholarships is important, not only from the point of view of the beneficiaries, but also in terms of demonstrating the commitment of the Government of Ireland and Irish higher education institutions to attracting students from overseas. There is a growing level of international interest in forging bilateral partnerships with the Irish higher education sector.

In the coming years, Ireland will continue to be responsive to new opportunities that arise to work in partnership with higher education systems and institutions around the world, as well as seeking to consolidate existing partnerships with key growth-markets by offering competitive pricing and a quality educational and experiential offer. We are committed to undertaking some research on the range of Scholarships currently on offer from Irish institutions, Agencies and organisations and this will inform coherence and strategic development in this area.

However, in addition, Government provision in this area will be enhanced and, in particular, an increase in funding for the Government of Ireland's International Scholarships will signal that the internationalisation of higher education is a policy-priority for the Ireland. We currently provide 21 Government of Ireland Scholarships. The number and value of Government of Ireland Scholarships should be increased to 60 to reflect our new engagement in new markets.

Resourcing these proposals

Looking forward, the Education and Training (Qualifications and Quality Assurance Act) 2012 makes provision for fees and charges associated with authorisation to use the International Education Mark and Code of Practice.

The Ministerial Policy Statement on Regulatory Reform



on the International Education Sector and Student Immigration also notes that funding models for an enhanced inspection regime will be examined. Options could include per capita contributions or a charge per programme on the Interim List Eligible Programmes or its successor. The potential for a co-ordinated single charge covering all international promotion, marketing and inspection costs must also be examined. Consultation will take place with the sector on models to achieve this.

Proposals to fund the additional Exchequer costs for new elements proposed in the areas outlined in this Chapter will be pursued through the annual Estimates process as necessary.

4.3 Implementation and Monitoring

The actions to enhance Ireland's performance involve all stakeholders, including Government Departments, State agencies, education institutions and representative bodies. It is essential therefore that implementation takes place on a partnership basis.

There is a variety of challenges and resource constraints facing stakeholders throughout their full range of activities. It is proposed that implementation will be phased over the full course of this five-year Strategy.

The High-Level Group on International Education (HLG) will be responsible for monitoring overall implementation of this Strategy and will meet formally twice a year. A number of sub groups, responsible for driving specific actions, will also be formed and report at these bi-annual meetings. A formal review, led by the HLG, will take place mid-2018.

Progress towards the Strategic Priorities and Actions will be monitored through publication of the annual report on internationalisation. Higher Education Institutions, in conjunction with the HEA and the system performance framework, will also need to monitor the progress of their own internationalisation strategies and plans.

PART 5

Appendices





APPENDIX 1

Trends and Economic Value of International Students

Introduction

The following presents a detailed analysis of trends in the numbers of international student and value of economic output generated by these students. This appendix is presented in two sections. The first section outlines the recent trend in international student numbers in HEA funded Higher Education Institutes (HEIs) across categories such as EU and non-EU students, postgraduate and undergraduate programmes, institution type and domicile of origin. It also considers the recent trend in international student numbers in privately funded HEIs between 2010/2011 and 2014/2015.

The second section details the incomes from international students to both Higher Education Authority (HEA) funded and privately funded institutes and the likely economic output impact of international students in Higher Education and English Language Training in the 2014/2015 academic year.

Methodology

In this analysis, international students are defined as those that are studying full-time that have a domicile of origin outside of Ireland.

Data described here was collected from the HEA's statistics on international students, Higher Education Colleges Association (HECA) data on international students and from a survey on long stay English Language Training students studying for more than 24 weeks in Ireland in 2015. Data on English Language Training (ELT) has been supplied by the ELT Steering Group set up to oversee the preparation of the proposed English Language Strategy.

A limitation in using HEA and HECA data is that some of the population of international students are underestimated. For example HEA data for full time students 2014/2015 reports less students from the United States compared to other studies (e.g. International Open Doors Report). A significant portion of the discrepancy is accounted for by study abroad programs students, who only enrol in Irish institutions on a part time basis and are therefore outside the definition applied in this analysis, or students whose programme is run completely by the US institutions themselves which would exclude them from HEA student statistics.

For the estimate of economic value of international students in Higher Education, which is presented in the second section, the analysis combines tuition fee for non-EU students (or student contribution for EU students), non-tuition expenditures for those students physically present in the country (i.e. excluding students in overseas campuses), visa fee and Garda National Immigration Bureau fee for non-EEA or Swiss students. The economic impact referred to in this section is specifically economic output.

For the economic value of international students in English Language Training which is also presented in the second section, the direct value comes from the Study Travel Magazine Global Market Report for the ELT sector. This is the only publicly available source of data on the global/international ELT market and contains data on revenue, student numbers and student weeks taught for each of the 8 ELT-providing countries, including Ireland. These figures include revenue to ELT schools and spending by students whilst in host countries.

Using the latest CSO multipliers it is possible to estimate the indirect and induced impacts or output multiplier of this activity. The output multiplier for the education is the change in the total output from each domestic industry required in order to produce one additional unit of education output (e.g. additional teaching hour). To estimate indirect and induced effects of the sector, multipliers are derived from the latest available CSO input-output tables for 2011.

The Type I and Type II output multipliers estimated from the CSO data are presented in the table below. Taking education as an example, every €1 euro spent on education generates a further secondary output impact of €1.167.

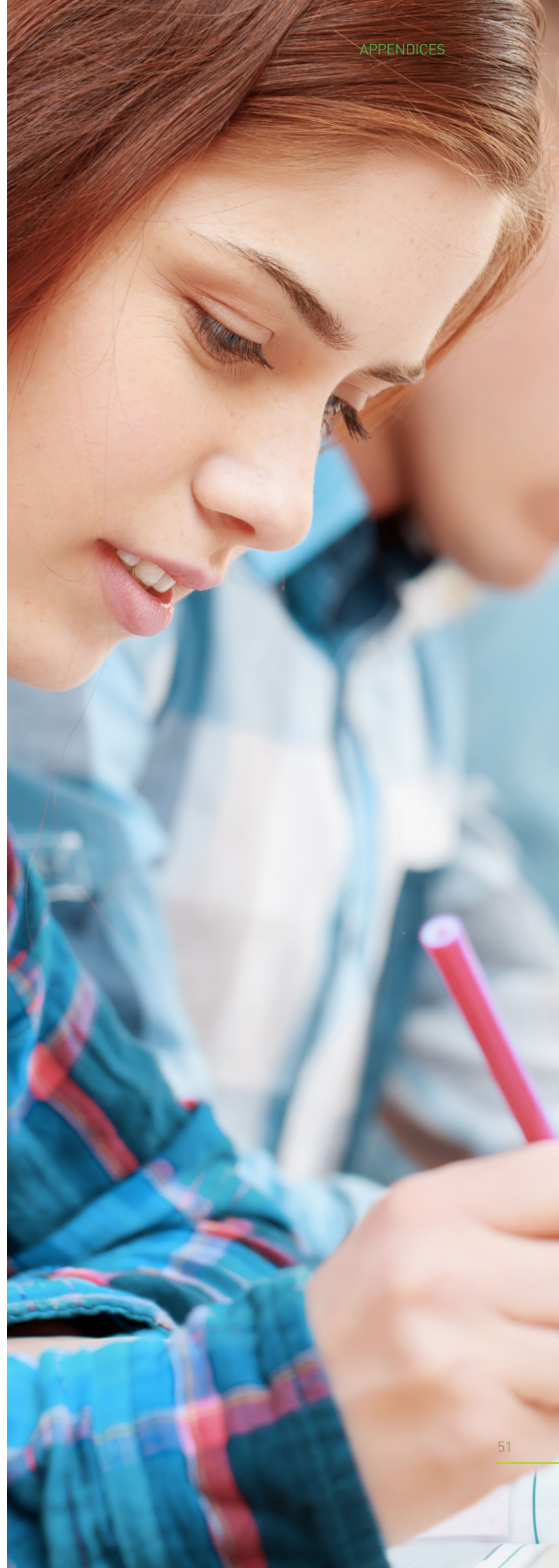
Table 1: Type I and TYPE II Sectoral Multiplier

CSO sector	Estimated Type I Multiplier	Estimated Type II Multiplier
Accommodation and food & beverage	1.3020	1.9853
Cultural and sporting activities	1.0999	1.4665
Education	1.2280	2.1670
Land transport services	1.4377	2.0984
Public Administration	1.3886	2.0296
Recreation services	1.0734	1.6579
Retail trade	1.3035	1.8224
Travel and tourism service activities	1.0737	1.8681

Source: CSO, Crowe Howarth

This analysis presents three output values; direct output, indirect output and induced output. Direct output effects are the changes that occur in the “front end” of the institute or school or business with direct contact with the students that would initially receive expenditure and revenue as a consequence of operations. In this case, we measure the tuition fee income, non-tuition spend in the economy, visa costs and Garda National immigration Bureau fees. Indirect output effects are the “ripple effect” in the economy as a result of additional activity. These impacts could be on suppliers supplying the business that have experienced an increase in demand. Induced effects are the shifts in spending on goods and service at a household level as a consequence of changes in payroll of the directly and indirectly affected business.

The aim of this analysis is to conservatively estimate the value of international students. Additional values such as the amount of research funding leveraged from both public and private sources, the number of students purchasing multi entry visas , the contribution of additional visits from friends or family to Ireland, impact of the long stay students (24 weeks or more) working part or full time or other items are not included in this analysis. This value could be estimated and added on to these impacts. In most cases the lack of robust connected data to estimate these impacts has been adjudged to be sufficient reason for excluding the value of these additional items.





Section 1 Demographic Trends

The following presents the demographic trends in the international student population through statistics such as the number of international students by HEA-funded and privately-funded institutions, institutional breakdown of students attending HEA-funded institutions and the domicile origin of students attending HEA funded institutions.

Description of the International Student Population – HEA funded HEIs

In 2010/2011 (see Chart 3 below) 16,742 students attended HEA-funded Irish HEIs. This increased by 65% to 27,598 in 2014/2015. The increase over the period was primarily driven by increases in the non-EU student cohort, which increased by 95% from 9,746 to 19,039 (compared to a 22% increase in the EU student cohort).

Chart 3: Number of EU and non-EU Students. 2010/2011 and 2014/2015

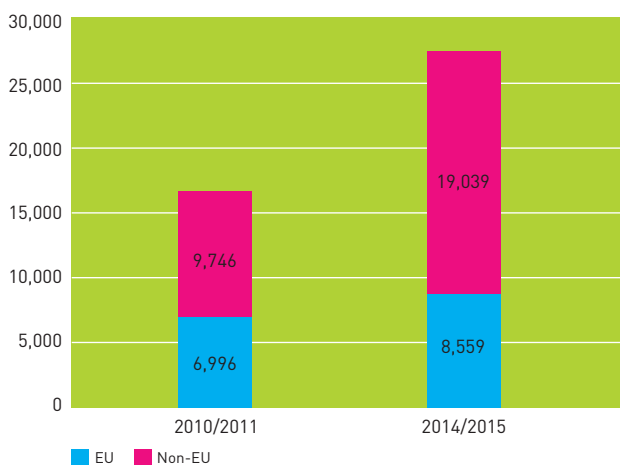


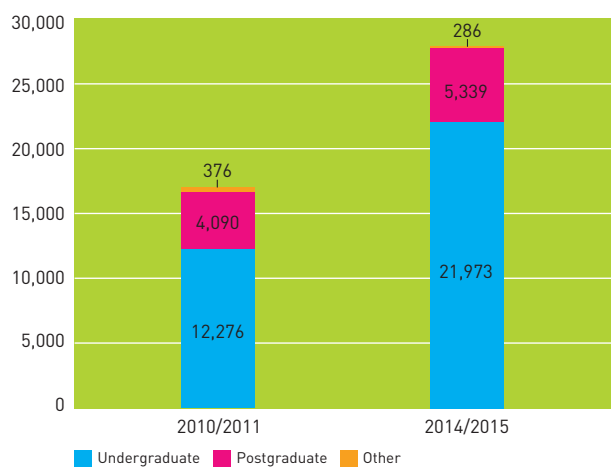
Table 2 shows the number of international students by category. The numbers in full-time programmes increased by 51% from 9,903 to 14,971, those in Erasmus programmes increased by 61% from 3,039 to 4,900. Those studying in an overseas campus grew by 81%. The number of students in the Junior Year Abroad (JYA) for the first term grew by 88% while the numbers of those studying in JYA programme for the second term increased by 9%, the smallest increase in all of the categories. The “Other Exchange” category which includes programmes such as non-EU exchange programmes and study abroad programmes saw a significant increase from 511 to 1,835 (up some 259%).

Table 2: Category of International Student, 2010/2011 and 2014/2015

Category	2010/2011	2014/2015
Full-Time	9,903	14,971
Erasmus (Incoming)	3,039	4,900
Overseas Campus	1,455	2,627
JYA Term 1 only	1,305	2,451
JYA Term 2 only	109	119
JYA Term Full Year	420	695
Other Exchange Incoming	511	1,835
Total	16,742	27,598

Looking at the breakdown by level of study since 2010 (in Chart 4), the largest increase has been seen in the number of students at undergraduate level, which increased by 79% from 12,276 in 2010 to 21,973 in 2014/2015. The numbers of postgraduates also increased by 31% from 4,090 to 5,339. However, as a portion of the international student population postgraduates have declined from 24% to 19% by 2014/2015. The percentage of international students on “Other” programmes which include Foundation and Access/Upskilling courses has declined by 24% over the period from 376 to 286.

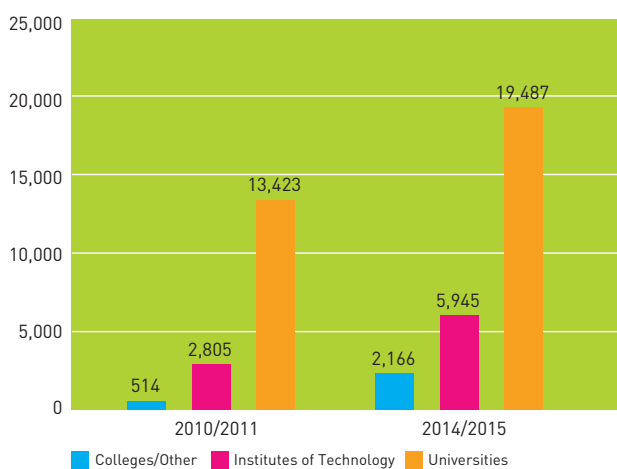
Chart 4: International Students Level of Study, 2010/2011 and 2014/2015



Institutional Breakdown – HEA funded HEIs

Chart 5 shows that, between 2010/2011 and 2014/2015, all types of HEA-funded Higher Education Institutions increased their number of international students. The Universities increased their international students by 45% from 13,423 to 19,487. Institutes of Technology’s (IoTs) increased their student numbers by 112% from 2,805 to 5,945 while the numbers in the Colleges and Other institutions increased 321% from 514 to 2,166.

Chart 5: International Students by Institution Type, 2010/2011 and 2014/2015



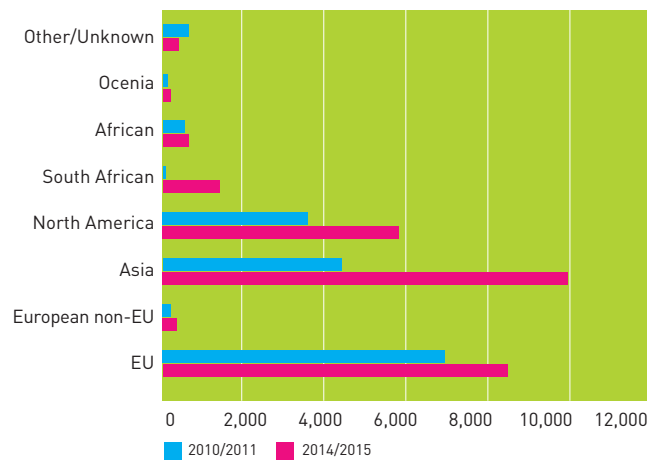
Domicile Origin of International Students – HEA funded HEIs

Looking at the composition of international students by continent, the South American and Asian cohorts saw the largest increases (see Chart 6). The number of South American students increased from 51 in 2010 to 1,431 in 2014/2015 and the number of Asian students increased from 4,448 to 10,094.

The main drivers of the Asian increase were significant increases in students from Singapore (1,277 - additional), Saudi Arabia (862 - additional), Malaysia (862 - additional) and China (817 - additional). There were also notable increases in students from Oman (23 to 473) and Kuwait (81 to 436).

The number of South American students increased largely as a result of the rise in Brazilian students coming to Ireland to study, primarily under the Science Without Borders initiative of the Brazilian Government. Of the 1,382 additional South American students in 2014/2015, 1,323 were of Brazilian origin. A similar trend is present in the increase in the number of North American students with the United States and Canada accounting for 96% of the increase over the period.

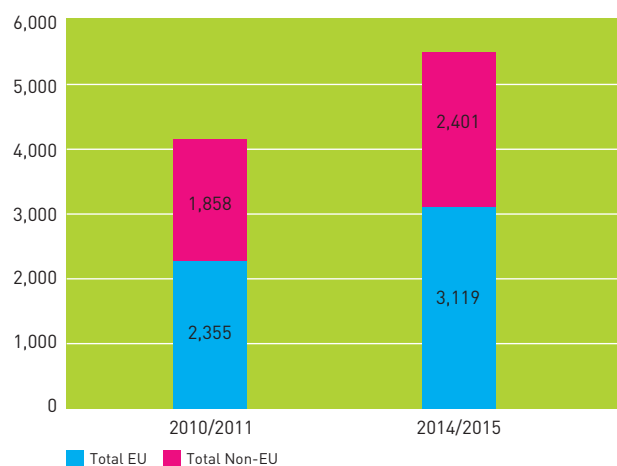
Chart 6: International Students by Domicile of Origin, 2010/2011 and 2014/2015



Numbers of International Students – Private HEIs

Turning to private HEIs, Chart 7 below describes the change in student numbers. Since 2010/2011, student numbers have grown by 31% from 4,213 to 5,520 in 2014/2015. The number of EU students grew by 32% from 2,355 to 3,119 compared to the 29% growth in the non-EU cohort which increased from 1,858 to 2,401.

Chart 7: Number of International Students in Private HEIs, 2010/2011 and 2014/2015



This section has identified the major trends in student numbers in HEA and privately-funded HEIs. Overall, both sectors experienced growth over the 2010/2011 to 2014/2015 period. The HEA-funded sector had significant growth in the undergraduate and non-EU student categories. The largest number of international students came from Asia and the EU, followed by students from North America and South America.



Section 2 Financial Contribution

The overall financial contribution from international students to the Irish economy in 2014/2015 is calculated by adding the fee income paid by both EU and non-EU students to the non-tuition spend of these students studying in Ireland.

Tuition Fees from International Students in HEA funded Universities and IoTs

It's important to separate EU and non-EU students when considering the incomes to the HEA-funded Higher Education Institutions.

Under the free fees scheme, EU students are entitled to the same treatment as Irish students, i.e. the Exchequer meets the costs of tuition fees and students must pay a student contribution. Non-EU students pay full tuition fees for the course they choose so their contribution per student to the HEI system is significantly greater than the contribution of Irish or EU students.

There were 4,007 EU students and 16,714 non-EU students studying and contributing income to IoTs and Universities in 2014/2015. In 2014/2015, the student contribution for HEA-funded HEIs was €2,750. Applying this student contribution to the total number of EU students in full time courses in IoTs and Universities, the value contributed to education institutions was €11m and income from non-EU students is estimated at €177m³⁹. Overall tuition income from international students is estimated at €188m with non-EU fees accounting for 94% of this income to HEA-funded IoTs and Universities.

Tuition Fees from International Students in Private HEIs

Data provided by HECA indicates that total tuition income from international students was €29.6m in 2014/2015. This figure is estimated by combining the number of students studying the full academic year (95% of students were enrolled for the full academic year) and the number of students studying for a semester only, multiplied by their respective average fees. The average fee for students studying for the full academic year, including postgraduates and undergraduates, was €5,528.

Non Tuition Spend from International Students in Ireland

In order to estimate the full economic impact of international students, it was necessary to estimate the non-tuition spend of those studying in Ireland. As part of the English Language Training (ELT) Strategy, Fáilte Ireland, Enterprise Ireland and the Department of Education and Skills commissioned a survey to establish the non-tuition spend of ELT students. Non-tuition spend includes accommodation, food and drink, transport, social activities, shopping and other. Those spending 24 weeks or more in Ireland who are studying in an ELT programme have been chosen as a proxy for full time international students. These students are likely to be similar to those in Higher Education, in that they are both staying in Ireland for a long period of time, have permission to engage in casual employment and are paying to consume an Irish educational services.

The analysis was based on a survey of ELT students, of which 40% were studying for 24 weeks or more⁴⁰. This survey didn't differentiate between those that received and those that didn't receive scholarships or grants, so the effects of these are assumed to be included in the grossed-up figures for student spend.

Accommodation is the highest expenditure of all the non-tuition items considered at a median cost of €385 per month. The next most expensive items were; food and drink which cost the median student €151.67 per month and social activities which cost €108.33 per month. Food, shopping and other categories had a median cost of €86.67 and transport expenditures per month were €58.50.

Table 3: Non-tuition related median expenditure

Expenditure	Median Monthly Cost ⁴¹ (€)
Accommodation	385.02
Social Activities	108.33
Food and Drink	151.67
Transport	58.50
Shopping	86.67
Other	86.67
Total	876.85

³⁹ Source: Higher Education Authority

⁴⁰ The survey has a margin of error of ±8.08% at the 95% confidence level.

⁴¹ The mean costs are not considered as the data had a significant amount of deviation so the median is the preferred measure

Non-tuition spend is grossed up by the number of students studying in Ireland (i.e. not in overseas campuses) and then multiplied by the weighted average number of weeks spent studying in Ireland. For the purposes of this report, it is assumed that weighted average number of weeks by student category⁴² is of 30.09 weeks or 6.94 months for 2014/2015 for HEA-funded institutions. For privately-funded institutions, the proportion of those studying for a full year compared to a semester is different so the number of weeks applied is slightly higher at 8.07 months per student.

Visa and Garda National Immigration Bureau Fees

To get an estimate of the economic output of the international students in Higher Education Institutions, we can combine the tuition fee, the non-tuition related expenditure adjusted by the estimated duration of stay and the visa costs which include the Garda National Immigration Bureau fee of €300 and Single-Entry visa fee of €60.

Output Impact of Higher Education

Combining the income of the institutions from EU and non-EU sources, the median non-tuition related expenditure and the associated visa fee and GNIB fee for those who are not citizens of a member State of the European Union, the European Economic Area or Switzerland, the total direct economic output generated by international students in the HEA-funded IOT's and Universities for 2014/2015 was approximately €331m.

Table 4: Detailed Breakdown of Direct Output in HEA Funded IOTs and Universities

	Outputs	2014	Workings/ Source
A	Tuition income from EU students in Unis and IOTS (€m)	11	(€2500*3,899)
B	Tuition income from non-EU students (€m)	177	HEA accounts
C	Non-tuition income for long-stays (Crowe) (€m)	139	(D*E)*F
D	Median spend for long-stay student p/w (€)	877	Survey
E	No. EU and non-EU students attending Unis and IOTS	22,820	HEA data
F	Average number of weeks per int. Student pa	6.94	HEA data
G	Visa and GNIB fees (€m)	4.67	
J	Direct Output	€331m	A+B+C+G

For the privately-funded HEI sector, the direct output impact of international students attending private HEIs was €70m. This is derived by combining the tuition and median non-tuition expenditure of students attending private HEIs plus the visa and GNIB for non-EU students as demonstrated in Table 5 below.

Table 5: Detailed Breakdown of Direct Output in Privately Funded HEIs

	Outputs	2014	Workings/ Source
A	Tuition income from students (€m)	29.6	HECA data
B	Non-tuition income for long-stays (Crowe) (€m)	39	(C*D)*E
C	Median spend for long-stay student p/w (€)	877	Survey
D	No. EU and non-EU students attending private Institutions	5,520	HECA data
E	Weighted average number of weeks per int. Student pa	8.07	HECA data
F	Visa fees (€m) (non-EU students)	0.86	
G	Direct Output	€70m	(A+B+F)

⁴² It is assumed for HEA funded institutions students studying the Junior year Abroad term 1 and 2 are studying in Ireland for 15 weeks and all other programmes have a study period of 32 weeks, which when weighted by the numbers of students in different categories gives a weighted average of 30.46 weeks or 7.03 months



As noted above, the direct output of HEA-funded Higher Education was €331m. Based on these numbers, the indirect output impact of HEA-funded Universities and IOT's was €80m and the induced output impacts was €268m. In 2014/2015 the total direct, indirect and induced output effects of Higher Education international students was €679m. The indirect output impact of the private Higher Education sector was €17m and the induced output impacts was €53m. In total the output impact of international education in private HEIs was €140m.

The overall direct output impact of HEA-funded IoTs and Universities, together with privately-funded HEIs, in 2014/2015 was €401m. Applying CSO output multipliers the indirect output impact was €97m and the induced output impact was €321m. In total the output impact of HEA-funded and private higher Education was €819m (see Table 6 below).

Table 6: Value of Output of International HEA funded Higher Education, 2014/2015

2014/2015 - Value of Output (€m)	Direct	Indirect	Induced	Knock-On: Indirect and Induced Effects	Total: Direct, Indirect and Induced Effects
HEA funded IoTs and Universities	331	80	268	347	679
Private Higher Education	70	17	53	70	140
HEA and Private Higher Education	401	97	321	418	819

*The sum of individual columns may not add up to totals due to rounding

Output Impact of the English Language Training Sector

The International Education sector in Ireland also includes the English Language Training (ELT) sector, which had a student population of approximately 106,000 in 2014/2015. These figures have been estimated using the methodology applied by the Student Travel Magazine Global Market Report. The direct output impact is estimated by measuring the revenue to ELT schools and spending by students while in the host country. Figures are reported in US dollars and a US dollar to Euro exchange rate from the Central Bank/European Central Bank rates.

According to estimates informed by the Student Travel Magazine Global Market Report for 2014, the direct impact of ELT in Ireland was €390m in 2014/2015, this translates to €105m in indirect impacts and €267m in induced impacts.

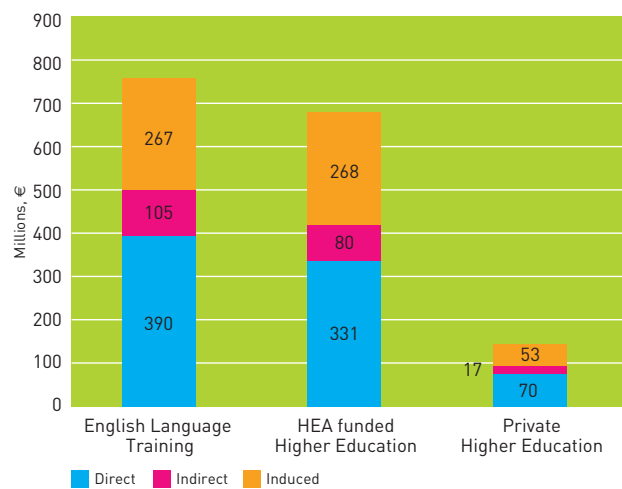
Table 7: Value of Output of ELT, 2014/2015

2014/2015 - Value of Output (€m)	Direct	Indirect	Induced	Knock-On: Indirect and Induced Effects	Total: Direct, Indirect and Induced Effects
English Language Training	390	105	267	372	762

* The sum of individual columns may not add up to totals due to rounding

When all sectors are combined the direct impact was approximately €791m. The Knock-on effects (indirect and induced) of these sectors is estimated at €790m, making an economic impact of €1.58bn in 2014/2015 (see Chart 8 below).

Chart 8: Value of Direct, Indirect and Induced Impacts of Higher Education and ELT, 2014/2015



Conclusion

In conclusion, the financial contribution of international students to HEA-funded Universities and IOT's and privately-funded HEIs was approximately €217m in 2014/2015 with non-EU students responsible for 94% of the total international student income in HEA institutions. Overall in 2014/2015, international education in the HEA funded Universities and IoTs, privately funded HEIs and the ELT sector had an estimated direct output of €791m, indirect and induced output of €790m and a total output impact of €1.58bn.

APPENDIX 2

Members of the High Level Group on International Education

The Department of Education and Skills
The Department of Foreign Affairs and Trade
The Department of Justice Equality & Law Reform
The Department of Transport Tourism & Sport
The Department of Jobs, Enterprise & Innovation
Quality & Qualifications Ireland
Higher Education Authority
Enterprise Ireland
Irish Universities Association
Institutes of Technology Ireland
Marketing English in Ireland
Higher Education Colleges Association
Irish Council for International Students
Science Foundation Ireland
Dublin Institute of Technology
Royal College of Surgeons in Ireland
Assoc. of Study Abroad Providers



APPENDIX 3

Glossary

ASAPI	Association of Study Abroad Providers in Ireland
CERI	Centre for Educational Research and Innovation
CSO	Central Statistics Office
DES	The Department of Education and Skills
DFAT	The Department of Foreign Affairs and Trade
DJE	The Department of Justice and Equality
DJEI	The Department of Jobs, Enterprise and Innovation
ECU	Equality Challenge Unit
EEA	European Economic Area
EI	Enterprise Ireland
ELT	English Language Training
ESF	European Social Fund
ETC	Export Trade Council
EU	European Union
FI	Fáilte Ireland
GCD	Griffith College Dublin
GNIB	Garda National Immigration Bureau
HE	Higher Education
HEA	Higher Education Authority
HECA	Higher Education Colleges Association
HEI	Higher Education Institution
HLG	High Level Group on International Education
IBC	International Branch Campus
ICOS	Irish Council for International Students
ICT	Information and Communications Technologies
IEM	International Education Mark
INIS	Irish Naturalisation and Immigration Service
IOT	Institutes of Technology
IOTS	Institutes of Technology
IRC	Irish Research Council
ISCA	International Strategic Cooperation Award Programme
ISSE	Irish Survey of Student Engagement
IUA	Irish Universities Association
JYA	Junior Year Abroad
MEI	Marketing English in Ireland
NCAD	National College of Art and Design
NFQ	National Framework of Qualifications
NUIG	National University of Ireland, Galway
OECD	Organisation for Economic Co-operation and Development
QQI	Quality and Qualifications Ireland
RCSI	Royal College of Surgeons in Ireland
SFI	Science Foundation Ireland
TCD	Trinity College Dublin
TNE	Transnational Education
UCD	University College Dublin
UL	University of Limerick



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OIDEACHAIS | EDUCATION
AGUS SCILEANNA | AND SKILLS