



Rialtas na hÉireann
Government of Ireland

Focus on International Education Services

August 2020



International Education Services

Description

The International Education Sector includes a range of overlapping sub-sectors including the provision of third level educational services to international students and language learning courses. Student migration is driven by differences in education quality and language of delivery between the country of origin and host country as well as factors such as economic, cultural, individual safety, political stability and the robustness of institutions in the receiving country.

Snapshot

Global		Market Size
	Internationally Mobile Students ⁱ	5.3 million in 2017;
Ireland	International Students ⁱⁱ	38,187
	English Language Teaching (ELT) Students ⁱⁱⁱ	121,462 (2018)
	Economic contribution ^{iv}	€1.58bn (2016), annual income target of €2.1bn by 2020

- i. An internationally mobile student is an individual who has physically crossed an international border between two countries with the objective to participate in educational activities in a destination country, where the destination country is different from his or her country of origin." (UNESCO,) <http://data.uis.unesco.org/Index.aspx?queryid=172> (<https://migrationdataportal.org/themes/international-students>)
- ii. Higher Education Authority (http://data.uis.unesco.org/Index.aspx?DataSetCode=EDULIT_DS)
- iii. ELT Students- Marketing English in Ireland Figures
- iv. Irish Educated Globally Connected, International Education Strategy, 2016-2020 (2016).

Pre-COVID-19 Position

- Globally, competition was intensifying with new players on the market. International student mobility had been growing significantly worldwide over the past two decades, increasing from 2 million in 1998 to 5.3 million in 2017.¹ English speaking countries were the most

¹ OECD Education at a Glance 2019

attractive to international students with more than 40% of all mobile students in OECD and partner countries studying in just four countries, Australia, Canada, the UK and the US. Other main destinations include France, Germany and Russia.

- Several OECD countries offered international students the same fees as domestic students or waived their fees entirely because of their long-term strategic value. Similarly, some countries had adopted favourable immigration and residency conditions for international students.² Many new entrants, who have previously sent students abroad, have increasingly ambitious intent to become international student hubs, e.g. China and Malaysia.
- The use of technology has enabled remote delivery of education and blended learning. E-learning had been an expanding market already extending beyond the educational environment to the corporate world.
- Prior to the pandemic, International Education was a growing sector in Ireland also, providing direct economic impact and potential for effective international linkages through alumni
- Funding for the third-level sector fell during the economic downturn in Ireland, and while the government had been increasing investments over recent years, international student fees are an important source of revenue.
- 12.5% of enrolments in public HEIs were international students in 2017/2018 representing steady progress towards the target of 15% international students in the full-time student population. Latest available figures for the 2017/18 academic year indicated that there were 38,187 international students in the overall student population, up from 35,571 in the previous year. The total number of full time international students in academic year 2017/2018 was 29,345.
- More than 150,000 students attend English Language Teaching (ELT) programmes in Ireland every year. The sector's total value to the Irish economy is estimated at roughly €900 million, with a full-time employment base of 3,000+ and a further 7,000+ seasonal and part time staff engaged during peak periods.³
- Ireland's international education sector contributed approximately €1.58 billion to the economy in 2016 with a target to increase this to €2.1 billion per year by 2020.⁴
- The number of new international students from outside the European Economic Area (EEA) pursuing higher education in Ireland jumped by 45% between 2013 and 2017.⁵
- In 2017, international students made up 7% of tertiary students enrolled in bachelor's programmes (OECD average: 4%), 19% of those enrolled in master's programmes (OECD average: 13%) and 29% enrolled in doctorates (OECD average: 22%).⁶

² Irish Educated Globally Connected, International Education Strategy, 2016-2020, Department of Education and Skills (2016)

³ ICEF Monitor June 2020

⁴ The Internationalisation of Irish Higher Education (2018) A review of Ireland's International Education Strategy 2016-2020 is currently underway by Indecon is due for completion in August 2020 and will provide updated figures.

⁵ ICEF Monitor June 2019

⁶ OECD Education at a glance 2019 Country Note

- The main non-EEA countries of origin of international students are the United States, China, India, Saudi Arabia, Malaysia and Canada. Asia represents 43% of international students, North America, 30%; EU 20% and the rest of the world, 7%.
- Ireland has generous post-study work policies in place for non-EEA students completing higher-level studies in the country. International graduates of recognised degree programmes at Level 8 (undergraduate) or higher may apply for the Third Level Graduate Scheme which allows them to stay in Ireland for 12–24 months after they have completed their degree. Master's degree, postgraduate diploma, and doctoral degree holders may remain in Ireland to two years.⁷

Impact of COVID-19

GLOBAL

- The financial impact of the pandemic is now being felt by higher education institutions around the world. Most institutions are projecting declines in both domestic and international student numbers, with combined tuition shortfalls running into the tens of billions of dollars.⁸
- A recent survey of 11,000 students by QS, the educational rankings agency, suggested that nearly half of the students who were intending to study abroad now plan to defer.⁹

NATIONAL

- Uncertainties linked to the course of COVID-19 globally and restrictions on international mobility poses a potential threat to numbers of international students that study in Ireland. However, the extent of the impact on Irish universities and colleges remains to be seen over the coming months.
- Fee income from international students is a significant source of revenue and growing the cohort of international students in the HE Sector had been a key focus for the sector.
- Reductions in numbers of language students travelling to Ireland are likely to continue with significant reduction for the industry as a whole for 2020.

Issues, Opportunities and Challenges for the Sector

- Irish colleges and Universities face a potential reduction in numbers of international students in the 2020/21 academic year.

⁷ <https://monitor.icef.com/2019/06/ireland-number-of-non-eea-students-in-higher-education-jumps-by-45-over-five-years/>

⁸ ICEF Monitor April 2020

⁹ <https://www.qs.com/how-is-the-spread-of-the-coronavirus-impacting-prospective-international-students/>

- Average fee income from international students is a multiple of that of domestic students. One-for-one replacement of international students by domestic students would leave a substantial shortfall in fees income.
- The problems are compounded by the possibility that, despite a fall in the number of international students attending Irish third levels, Irish students may not take up those places through deferrals, financial pressures, or the decreased attractiveness of online rather than a full campus experience.¹⁰
- The peak months for the English Language Education sector are March to September, accounting for approximately 70% of revenue for the year and under current circumstances the impact of the 2020 season is significant.

¹⁰ HEA