



Rialtas na hÉireann
Government of Ireland

Focus on International Education Services

December 2018

International Education Services

A growing sector that provides direct economic impact and potential for effective international linkages through alumni



GLOBAL MARKET

5 million
International students globally



Source: Global International Students- ICEF Monitor, The State of International Student Mobility, 2015

IRISH MARKET

33,118
International students
in 2014/15

Source: International Students: Irish Educated Globally Connected, International Education Strategy, 2016-2020, DES

129,290
English language students
in 2017

Source: ELT students- Marketing English in Ireland

The International Education Strategy for Ireland outlines opportunities to:

Increase the number of international Higher Education Students to approximately 44,000

Increase the number of English language students coming to Ireland to 132,500

Source: International Students: Irish Educated Globally Connected, International Education Strategy, 2016-2020, Department of Education and Skills



Collectively increasing
the value of the sector
to €2.1 billion by 2020

The international education sector is worth a minimum of **€1.55 billion per annum** to Ireland

Source: International Students: Irish Educated Globally Connected, International Education Strategy, 2016-2020, Department of Education and Skills

International Education Services exports increased from €279.5m in 2010 to **€451m in 2016**

Enterprise Ireland client company exports. Source: Enterprise Ireland Annual Business Review, 2010 and 2015

Prepared by the Department of Business, Enterprise and Innovation



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The sector in numbers

	Number of International Students
Globalⁱ	Estimated at 5 million
Ireland	33,118 (2014/15) ⁱⁱ
	129,290 (ELT students in 2017) ⁱⁱⁱ

	Tuition Income 2014/15 ^{iv}
Ireland	€217.6m

i) Global International Students- ICEF Monitor, The State of International Student Mobility, 2015.

ii) International Students: Irish Educated Globally Connected, International Education Strategy, 2016-2020, Department of Education and Skills (DES)

iii) ELT students- Marketing English in Ireland Figures.

iv) Irish Educated Globally Connected, International Education Strategy, 2016-2020 (2016). Figure consists of tuition fees of International students in HEA funded HEIs (€188m) and tuition fees of international students in private HEIs (€26.9m).

Description of the sector globally

- The 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 between the country of origin and host country and the returns to education/skills as well as economic factors. Reasons for studying abroad can also be determined by factors such as cultural, individual safety, political stability and the robustness of institutions in the receiving country.

Global developments and implications

- Global competition is increasing as new entrants to the international student market are making inroads and existing destinations increase their investment and attractiveness. Previously the sector was dominated by the native English-speaking countries. However, over 25 OECD and partner countries now offer higher education programmes through English.¹
- A number of OECD countries offer international students the same fees as domestic students or waive their fees entirely because of their long-term strategic value. Similarly, some countries have adopted favourable

¹ OECD, Education at a Glance 2014

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 in their own right, e.g. China and Malaysia.

- Collectively, the US, the UK and Australia receive more than 50 percent of the total international students in the OECD area. France, Germany and the Russian Federation also attract significant numbers of students.
- The number of international students is now estimated at 5 million worldwide³, fuelled in large part by demand growth arising from the development of the middle class in rapidly growing economies in Asia.⁴
- In terms of demand, China (20%), followed by India (7%), Germany (4%), Korea, France and Saudi Arabia (ranging between 2-3%) are the top countries of origin for international students.
- One-third of OECD mobile students are enrolled in science, technology, engineering and mathematics (STEM) and student mobility increases with the level of education. Over a quarter of enrolments at doctoral level are international students compared with 5.6% on tertiary programmes.⁵
- The use of technology has enabled remote delivery of education and blended learning. E-learning is an expanding market extending beyond the educational environment to the corporate world (and often combined with knowledge management).

The sector in Ireland

- The international education sector is worth a minimum of €1.55 billion per annum to Ireland. Included in this is: delivery of undergraduate, postgraduate and PhD courses in Ireland's Higher Education Institutes (HEIs) and off-site; e-learning facilities (including distance learning); educational services to international students studying in Ireland.
- Enterprise Ireland client company exports in International Education Services increased from €279.5m in 2010 to €451m in 2016.⁶
- The provision of services to international students generates a wider impact and they develop a link with Ireland and become part of the Irish alumni community. They play an important role in terms of meeting skills shortages in some areas while those who remain in Ireland to work after graduating further contribute to economic growth.

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

³ ICEF Monitor, The State of International Student Mobility 2015

⁴ OECD Education Indicators in Focus: 'How is International Student Mobility Shaping Up?' 2013

⁵ OECD, Education at a glance 2017

⁶ Enterprise Ireland ABR 2010 and 2015 (Note survey populations change Year on Year)

- Ireland's international education offering was overhauled with the introduction of the ILEP (Interim list of Eligible Programmes) in 2015. ILEP is a mechanism for identifying eligible degree and English Language Tuition (ELT) programmes for recruiting non-EEA students.
- Irish higher education institutions offer a host of programmes in partnership with providers overseas. The Royal College of Surgeons in Ireland (RCSI), University College Dublin (UCD) and Griffith College have off-shore campuses. Over 2,500 students were registered on Irish programmes in campuses overseas in 2014/2015.⁷
- Ireland has a strong base of IT companies which are vital to the development of educational and e-learning tools, including Onwards Learning, Fishtree, HMM and Prometric as well as general eLearning companies (including Alison.com, Udemy, Pluralsight, etc.).

Ecosystem

- The Education in Ireland brand, website and student ambassador programmes strengthen Ireland's relationships in overseas markets. The website has a list of scholarships that are available to international students to study in Ireland
- Legislation is currently being drafted to introduce an International Education Mark (IEM) quality assurance scheme to confirm that holders of the mark have capacity to develop, maintain and improve the quality of education, training, research and related services for all learners.
- The Third Level Graduate Programme facilitates non-EEA graduates to remain and work in Ireland after graduation for a period of 2 years for Level 9 graduates and one year for level 8 graduates. It is open to any student who has completed their studies in Ireland and are awarded a qualification at Level 8 or above of the National Framework of Qualifications (NFQ) by a recognised Irish awarding body.
- The Government of Ireland International Education Scholarship Scheme is to promote Ireland as a centre of international education. For each of the 60 scholarship winners, awareness of Ireland will be raised among many more potential students.; it is funded in partnership between the Government and the Higher Education Institutions (HEIs).
- The academic mobility scheme, operated by the Department of Education and Skills (DES) funds mobility opportunities for HEI staff to deepen their collaborations with partner institutions in partner countries.
- The Science Foundation Ireland Discover Programme Call (April 2018) aims to support the STEM education sector in Ireland and is open to organisations not based in the Republic of Ireland but who must engage with their target audience based here.

⁷ DES, Irish Educated Globally Connected, International Education Strategy, 2016-2020, (2016)

Relevant Reports

Click on hyperlinks below

- [Irish Educated Globally Connected: An International Education Strategy For Ireland, 2016-2020](#)
- [Education Ireland: scholarships](#)
- [Ireland Connected: Trading and Investing in a Dynamic World, DFAT/ DBEI, March 2017](#)
- [Global Ireland: Ireland's Global Footprint to 2025, Department of an Taoiseach/DFAT, June 2018](#)

Key actors

Government Departments: Department of Education and Skills (DES) , Department of Business Enterprise and Innovation (DBEI), Department of Justice and Equality (DJE), Department of Foreign Affairs and Trade (DFAT)

Agencies and Bodies: Higher Education Authority (HEA), Enterprise Ireland (Education Ireland), Irish Council for International Students (ICOS)

Higher Education Institutions: Institutes of Technology, Colleges and Universities

Recent Developments

Company Developments

- Nord Anglia, a Hong Kong-based firm which runs international schools, will open in Dublin in September 2018, offering the International Baccalaureate (IB)
- Pluralsight, the enterprise technology learning company, announced plans to open a new EMEA headquarters in Dublin. They plan to hire 150 people in Dublin over the next three years and will bring more than €40m to the local economy (December 2017)
- Alison, free e-learning platform, announced the creation of 30 new jobs in their base at Galway Technology Park (May 2017)
- Rinocloud, provides online solutions for the management of raw data generated by researchers in academic and corporate research in the greentech, automotive, medical and artificial intelligence sectors. Rinocloud will be hiring for 10 new positions in Cork and recruitment will begin immediately. The new positions are for scientists and software professionals (April 2017)

Sector Developments

- Considerable changes continue to be made to enhance the business environment and development of the education services sector, These include: modifications to the third level graduate programme that facilitates a 'stay-back' of 2 years for level 9 graduates and one year for level 8 graduates; the introduction of the

International Education Scholarship scheme; the introduction of the academic mobility scheme; proposed legislation to introduce an International Education Mark (IEM) quality assurance scheme.