



Internationalisation of Irish Education Services



Report of Interdepartmental Working Group

November 2004



A N ROINN OIDEACHAIS AGUS EOLAÍOCHTA | DEPARTMENT OF EDUCATION AND SCIENCE



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A N R O I N N | D E P A R T M E N T O F
O I D E A C H A I S | E D U C A T I O N
A G U S E O L A I O C H T A | A N D S C I E N C E

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Foreword



Ireland is not a newcomer to international education. Fifteen hundred years ago, Ireland was recognised as one of the great centres of learning in the developed world. In the interim, many Irish missionaries and dedicated individuals have worked in countries across the world, contributing directly to local development through the provision of education services. More recently, the quality of Irish education was a central factor in the transformation of our economy. The Irish economy is now among the most open in the world and has benefited greatly from the rapid globalisation of trade in goods and services. Just as people are now sourcing goods from a wide range of diverse countries, so too are students at all levels increasingly pursuing studies overseas.

The international education services sector is now one of the fastest growing business sectors in the world. A recent British Council report estimated that in 2003 there were 2.1 million students worldwide pursuing higher education and that this figure will grow to 5.8 million by 2020. The significant increase in the use of English around the world is leading to accelerating demand for English language courses. Of a projected one billion English speakers by 2050, two thirds will be non-native speakers. Ireland has already secured an important element of this business with 200,000 visitors coming to Ireland in 2003 for the purpose of studying English. This sector alone is estimated to contribute some €300 million to the Irish economy annually.

I believe that Irish education services require a strong, focussed and consistent profile internationally. This can only be done through a coherent and committed approach bringing together the various stakeholders. The recommendations in the report will facilitate a partnership approach to promoting Ireland to overseas students and institutions. The relevant agencies and stakeholders will have a remit to build on the success to date of the “Education Ireland” brand overseas. The Department of Foreign Affairs, through its network of overseas offices will also support this work. I am conscious that it will be vitally important that the welfare of all students, national or international, continues to be given the highest priority.

I am pleased to endorse the report of the group and strongly support the partnership approach outlined throughout the process. I look forward to working with public and private sector partners to ensure that Ireland can take advantage of the opportunities offered by the growing international education services sector.

Mary Hanafin TD

Minister for Education and Science

Executive Summary

Introduction

Following Government approval of a proposal by the Minister for Education and Science, an interdepartmental group was established with the remit of considering the question of the 'Internationalisation' of Irish education services.

Issues that arose in the context of the group's work include quality assurance, immigration and visa issues and abuse of the system, need for better regulation, future marketing and promotion arrangements, academic and institutional supports for international students and scholarships.

Context

With increasing populations and rising incomes overseas student education is increasingly big business. Globally, there are now in the region of 2.1 million overseas students in tertiary education alone and this is expected to accelerate. The rising demand for education services presents many opportunities and challenges for Ireland.

A number of countries, mainly but not exclusively English-speaking ones, are pursuing this opportunity in a more proactive and co-ordinated manner than Ireland. The educational sector has been a significant generator of foreign earnings for many English speaking countries.

It is estimated that total earnings from overseas third level students in 2001/2002 was about €140 million, of which fees accounted for €68 million. The English as a Foreign Language (EFL) sector now brings almost 200,000 visitors to Ireland and accounts for an estimated €300 million in foreign earnings.

Further development of the education market leading to a more internationally open educational system would be consistent with the generally open and export-orientated nature of the Irish economy. It also enriches the experience of students and staff and facilitates the development of economic, financial and political cooperation. It should encourage tourism in future years, assist in the promotion of Irish exports and provide an additional source of supply of highly skilled graduates.

Definition and scope of international education

For the purpose of this report the Group considered the definition and scope of international education to include; international students coming to Ireland for second-level education, further education in Post Leaving Certificate courses, English language courses and higher education provision under a number of modes of delivery.

Recommendations

1. The international education market should be further developed in order to generate economic and societal benefits for the country. The presence of overseas students can contribute to promoting understanding, tolerance and cohesion both within Ireland and with other societies, cultures and countries. It represents a means of building up networks and contacts which can underpin the development of future economic, financial and political cooperation.
2. Within the framework of existing Government policy the Department of Education and Science should, in liaison with the providers, explore the scope for expanding the numbers of overseas students in the PLC sector while ensuring full cost recovery from the fees charged.
3. The EFL sector should continue to play a significant role into the future underpinned by the recommendations later in the report in relation to regulation and quality assurance.
4. The Department of Education and Science should carry out a more detailed examination in the secondary education area with particular regard to the potential for expansion in the numbers of overseas pupils, the potential costs arising and the appropriate level of fee that would be required to meet the costs.
5. As part of the promotion and marketing of international education the diverse modes for the delivery of higher education need to be closely considered and appropriate research commissioned to providing information and guidance on best practice.

Promoting Ireland

At national level the main agencies involved in promoting and marketing Ireland abroad are International Education Board Ireland (IEBI), Enterprise Ireland and Fáilte Ireland. The Department of Foreign Affairs also assists in the promotion of education exports through its network of embassies and consulates.

The Advisory Council for English Language Schools (ACELS) is a company limited by guarantee which operates under the aegis of the Department of Education and Science. Among its objectives are the control of standards in accreditation of EFL schools and courses and in teacher training for TEFL teachers.

The establishment of a single agency to co-ordinate policy and the promotion of Ireland as a centre of educational excellence was strongly supported in the majority of submissions received by the Group.

Recommendations

6. A new body to be called 'Education Ireland' should be established with specified functions in a range of areas including responsibility for the award of the Education Ireland Quality Mark, the operation of a code of conduct for the pastoral care of international students and the certification of EFL schools.
7. All personnel in IEBI and ACELS should be incorporated into Education Ireland which should act as the central agency responsible for the promotion of Ireland as a centre of educational excellence.
8. Education Ireland should establish protocols with Enterprise Ireland and Fáilte Ireland and should work in close co-operation with them to ensure the optimum synergy and cooperation in marketing and promotion.
9. Individual institutions should also be encouraged to continue marketing and promoting their own programmes under the Education Ireland brand.
10. The new agency should be led by an Education Ireland Board, which should be as small in numbers as possible to allow for more effective working.
11. Education Ireland's direct role in the accreditation of the EFL sector should be mediated through an expert / specialist sub-committee to advise the Board.

12. The process for awarding the quality mark to further and higher education programmes (in public and private institutions) across a broader range of disciplines should be conducted by the Board in close co-operation with agencies such as FETAC, HETAC, HEA and the relevant institutions which make their own awards under statutory provisions. These arrangements should apply to educational programmes of at least three months duration. A separate recognition / approval process will continue to apply, also operated by Education Ireland, for providers in the EFL sector offering shorter cycle courses who comply with the required criteria.
13. In recognition of the importance of the development of quality educational services for international students in Ireland, the Department of Justice, Equality and Law Reform should have discretion, supported by a regulatory framework,
 - i. to establish accelerated visa application procedures for those applying to pursue their studies in a recognised school in receipt of the Education Ireland Quality Mark and
 - ii. to refuse visas for study in institutions that do not have the Quality Mark
14. Education Ireland should be established on a statutory basis to underline the importance that the Government attaches to the role and functions of the body and to give greater stability and clarity going forward.
15. The medium-term aim for Education Ireland should be to become self-financing, through a combination of a gradual increase in fees and from extra revenue generated by expansion in the market as a result of its activities.

Quality assurance

A key element in attracting learners to a country to pursue their education is the evident quality of the educational experience. In this context, consideration of quality is not simply confined to the academic standards of a programme but also encompasses wider dimensions of the individual's educational experience, based on the quality of wider supports and services. These would include, for example, orientation, accommodation, health and welfare services. The existence of strong quality assurance arrangements is fundamental to any strategy for marketing Irish educational services internationally.

Recommendations

16. The use of a quality mark by higher education institutions in respect of the delivery of higher education programmes to international students should be based on the implementation of existing quality assurance procedures within the existing quality assurance framework for the sector.
17. A code of practice should be developed in consultation with the higher education institutions and be subject to the approval of Education Ireland. Once approved by Education Ireland, and subject to satisfactory quality assurance procedures, signatories to the code, who satisfy the quality assurance procedures, would be eligible to avail of the quality mark in marketing their programmes and recruiting international students.
18. Institutions should be required to report annually in a standard format on the operation of the code including the number and extent of complaints received from or on behalf of international students and the number of complaints that were not satisfactorily addressed.
19. In addition to the existing arrangements for quality control an appropriate code of practice should also be developed for EFL schools with provision for similar reporting and compliance requirements. These providers should also be eligible to apply for the Education Ireland Quality Mark for courses in excess of three months duration.
20. The Group supports the concept of mandatory regulation for the EFL sector for courses of more than three months duration. It recommends that the Minister for Education and Science make arrangements for an in-depth examination of the issues involved in consultation, as appropriate, with interested parties with a view to preparing draft Heads of a Bill to underpin the development of a regulatory framework.

Visa, Immigration & Working Arrangements

Concerns have been expressed by a number of contributors to the consultation process about the time taken to process visas, communications with visa/immigration administration, perceived inconsistency in procedures and the high refusal rates for certain categories of visa applications.

The coherence, transparency, efficiency and effectiveness of the visa system is a vital issue in respect of some of the main growth markets. The Group recognises the need for a clear and consistent Government policy governing immigration for study purposes including visa issues which, in addition to security issues, takes account of national economic interests and is consistently applied across all parts of the visa/immigration system.

The Department of Justice, Equality and Law Reform and the Department of Foreign Affairs accept that the visa service provided falls short of what is desirable and are working to improve the position.

During 2003 the Minister for Justice, Equality and Law Reform in co-operation with the Minister for Foreign Affairs brought proposals to Government for further improvements in the system. Progress is being made in this regard.

Recommendations

21. Greater vigilance by education institutions and closer cooperation with the visa services would enhance our capacity to minimise the scope for abuse.
22. Non-EEA nationals attending short-term courses should not be allowed to remain for more than eighteen months.
23. An administratively workable arrangement should be developed which embodies the following principles:
 - Access to the labour market should be confined to students on full-time courses of at least one year's duration leading to a qualification recognised by the Minister for Education and Science.
 - Students on preparatory courses (such as language courses) prior to enrolment on a full-time course of at least one year's duration leading to a recognised qualification, will not have access to work until they have been enrolled in the latter course.

Capacity at Third Level

The expectation of falling intake to third level on foot of declining births in the 1980s has not materialised in recent years and the projected numbers at third level do not indicate any substantial 'demographic dividend' on offer in the years ahead. Given the necessity to ensure that the development of international educational services should not result in the displacement of students of families resident in Ireland, capacity for approximately 160,000 students may be required in the publicly aided third level sector by 2010.

Recommendations:

24. Any surplus fee income derived from the attraction of overseas students should be retained for use at institutional level.
25. A borrowing facility should be developed for higher education institutions wishing to develop facilities and market programmes for international students under the 'Education Ireland' brand.

Other Issues

Recommendations

26. Educational institutions should be encouraged to collectively provide a scholarship fund from their international earnings which should be matched by the Exchequer initially up to a limit of €1 million per annum.
27. Education Ireland should lend strong support to the research funding agencies and higher education institutions in their efforts to market Ireland internationally as a destination of choice for research careers.
28. Institutions looking to attract overseas students should seek to provide advance information on fees packages that reflect the level of fee to be charged in each year of the programme.
29. Adoption of policies in line with the National Action Plan against Racism should be considered necessary for obtaining the Quality Mark.
30. Education Ireland should consult with the various educational stakeholders in Northern Ireland to identify areas for further cooperation in international educational services.
31. Education Ireland should work with providers of education services to overseas students in ensuring that the proposed Irish national portal for higher education and research is utilised to best effect in the provision of information for marketing Irish education services.

Introduction

Following on from the Government approval (S180/20/10/0679 of 16 July 2003) of a proposal by the Minister for Education and Science, an interdepartmental group was established with the remit of considering

- a. the most effective way of promoting Ireland as a centre of educational excellence for international students and for the promotion of Irish education abroad.
- b. the promotion of a 'Quality Mark' specifying required educational and student support standards to which all education providers in Ireland, seeking to attract foreign students, would adhere.
- c. the range of issues which arise from the intention to promote and expand the internationalisation of education services including, inter alia, the possibility of establishing a single agency for the promotion of Ireland as a centre of educational excellence.

The group was mandated to consult with such persons and organisations as it considered appropriate and consider relevant reports and other necessary documentation. In making its recommendations the group was to have regard to current government policies in relation to the public finances and public sector numbers.

In response to an advertisement in the press twenty-five submissions were received for consideration by the interdepartmental group. The group, chaired by the Minister for Education and Science, met a number of interested parties who made presentations and answered queries in relation to issues that arose. Issues that arose in the context of the group's work include quality assurance, immigration and visa issues and abuse of the system, need for better regulation, future marketing and promotion arrangements, academic and institutional supports for international students and scholarships.

Arising from its consideration of the submissions received, the discussions with interested parties and the experience of other countries in this area, the group sets out in this report a series of proposals for the development of international education services. This report attempts to encapsulate the opportunities and challenges facing international education policy in Ireland and how, working in partnership, sustainable growth can be achieved.

Context

Growing demand for education

The world is at a turning point in the internationalisation of education and training. With increasing populations and rising incomes overseas student education is increasingly big business. Globally, there are now in the region of 1.6million overseas students in tertiary education alone and this is expected to accelerate. The rising demand for education services presents many opportunities and challenges for Ireland.

Education makes a critical contribution to personal well-being, social, cultural and economic development. International education contributes to Ireland's engagement with the world, socially, culturally and intellectually as well as economically. At EU level, the importance of the role of higher education in promoting co-operation with developing countries has been recognised with EU Commission proposals for the promotion of Europe as a centre of excellence for higher education through, inter alia, its proposal for an Erasmus world programme.

Ireland has been engaged in overseas student education at various levels for many years. Many individual higher education institutions are already very successful at attracting overseas students and, with a clearer policy and more positive support, the potential for more Irish institutions to become involved and for existing players to expand activity is very considerable. Our reputation for educational excellence must be preserved and we should build on that reputation at a time when there is increasing awareness of the possibilities in this market.

A number of countries, mainly but not exclusively English-speaking ones, are pursuing this opportunity in a more proactive and co-ordinated manner than Ireland. The educational sector has been a significant generator of foreign earnings for many English speaking countries: Australia (€2.27bn), U.K. (€4.45bn) and New Zealand (€0.73bn).

Market Potential

A brief consideration of the growing demand for higher education in three countries – China, India and Malaysia - gives an indication of the potential of the market.

China, with the world's largest population, sees increasing education provision at the higher levels as an important aspect of the country's changing economic strategy and this cannot be fully met in the country. Figures show that the number of Chinese students pursuing studies abroad over the last decade has increased ten fold. It is estimated that excess demand for higher education in China is around 10 million and that, barring major shocks, this will continue to grow. There were about 2,000 Chinese students in third level institutions in Ireland in 2003.

In India, as with China, the number of students studying abroad has been increasing strongly over the past decade and, with excess demand at home, this trend is set to continue. India, with China, is reckoned to dominate the predicted increase in demand for overseas further education in the decades ahead. There are approximately 1,000 Indian students in third level education in Ireland compared to 55,000 in the USA. However the significant difference is that the Indian market tends to be about 70% concerned with postgraduate opportunities.

Over 120,000 Malaysians study abroad. The most popular destinations tend to be the UK, USA, Australia, New Zealand and Egypt. There are approximately 600 Malaysian students studying in Irish Universities and about 200 in private colleges or off-shore campuses of Irish institutions. The Malaysian government also provides scholarships for students studying abroad. This is on the increase again, following the economic downturn experienced in the 1990s.

With the world's population projected to grow by 1.5 billion over the next two decades and rising per capita income, participation at all levels of education is set to increase. The ability of countries to satisfy this growing demand depends on their development of educational resources. China, for example, estimates it will have a shortfall of over one million teachers and 100,000 academics by 2005.

The significant increase in the use of English across the world is leading to accelerating demand for English language intensive courses. Of a projected one billion English speakers by 2050, two-thirds will be non-native speakers.

Demand for tertiary education is forecast to grow from just under 100 million student places in 2000 to around 260 million places in 2025. With expanding economic activity and household wealth, it is estimated that by 2020 nearly 6 million students will seek to obtain an international education experience, especially in an English-speaking environment

Overview of existing provision for international students in Ireland

There were about 9,300 overseas third level students in Ireland in 2001/2002, excluding exchange students. About 3,800 (40%) of these students were from the European Union and the remaining 5,500 were fee-paying students from outside the EU. About half the EU students are from the United Kingdom and about one third of the non-EU students are from North America.

Overseas students in Ireland currently constitute about 7% of the total third-level student population. This is a "medium" share by international standards but the most proactive countries have significantly higher shares. Most recent comparable estimates for the UK are 15%, for Australia 12% and New Zealand is also 7%.

It is estimated that in 2000 Ireland had a share of 0.49% of all overseas third level students in

the OECD. The comparative figures for different origins were: UK 6.6%; Continental EU 0.6%; North America 1.7%; Asia 0.2%; Other 0.2%. Our strength is in the UK and US markets and we are weak in the newer origin markets.

In terms of disciplines, health and welfare accounted for 43% of the total overseas students in 2001/2002. This reflects the combined role of the Royal College of Surgeons and the university medical schools. The humanities and arts accounted for 31% giving these two sectors a combined total of nearly three-quarters.

It is estimated that total earnings from overseas third level students in 2001/2002 was about €140 million, of which fees accounted for €68 million.

The EFL is recognised as a valuable niche in the tourism market. The sector, which has been developed primarily by indigenous, private-sector organisations, now brings almost 200,000 visitors to Ireland and accounts for an estimated €300 million in foreign earnings. The EFL sector is thus quite significant in terms of overseas education as a whole and is greater in economic terms than fee-paying third level students.

The rationale for further development of education services for overseas students

Ireland has been engaged in overseas student education for many years and this has generated significant income for the country and individual institutions. We have performed reasonably well when compared to other competitors and in the absence of a coherent national framework. A number of other countries, mainly English speaking, are pursuing the opportunities offered by this market in a more proactive and coordinated manner. Further development of this market leading to a more internationally open educational system would be consistent with the generally open and export-orientated nature of the Irish economy. Other important considerations include the following:

- The presence of overseas students on our campuses enriches the experience of students and staff. We live and need to make our way in a world which is increasingly integrated – culturally (at least at the level of popular culture), through communications systems and socially and economically. The experience of working and living with students from other cultures, and with different worldviews should promote understanding, tolerance and cohesion both within Ireland and with other societies, cultures and countries.
- It represents a means of building up networks and contacts with potential business and public service leaders and influencers in other countries and through these the development of economic, financial and political cooperation. We have seen the economic and social importance of the networks which flowed from the so called Irish diaspora.
- It should promote tourism in future years and assist in the promotion of Irish exports of goods and services.
- In an economy which has experienced skills constraints and shortages, graduating overseas students represent a possible additional, accessible and highly skilled source of supply in the labour market.

Definition and Scope of International Education

For the purpose of this report the Group considered the definition and scope of international education to include the following:

- (a) International students coming to Ireland for
 - (i) Second-level education
 - (ii) Further education in Post Leaving Certificate courses
 - (iii) English language courses
- (b) Higher Education provision under the following headings used by the General Agreement on Trade in Services (GATS)
 - (i) **Consumption abroad:** The service is supplied in one country to the consumer coming from another country e.g. students travelling overseas to study.
 - (ii) **Cross-border supply:** The service is supplied from the territory of one country into that of another e.g. distance education including e-learning.
 - (iii) **Commercial presence:** The service is supplied by a college through commercial presence in another country e.g. establishment abroad of campuses, provision of courses in overseas locations.
 - (iv) **Movement of persons:** The supply of a service by a provider coming from the territory of one country to that of another e.g. professors and lecturers from a college working abroad.

International students coming to Ireland for Second-level Education

The Group considered the scope for developing the international market in this area. It identified issues for consideration in relation to present numbers of overseas pupils, present policy and the possible impact of a change in policy particularly in relation to capacity and costs.

Current policy in relation to applications for unaccompanied minor non-EEA nationals to come to Ireland for the purposes of second level education permits the entry of such persons to attend fee paying second level schools only and seeks to ensure that they will not be a burden on the State during their studies. In those circumstances, it is a matter for the Department of Justice, Equality & Law Reform to enforce any visa requirements. The system does not envisage such persons coming to the country to avail of free second level education.

Over 11,000 pupils or 3.3% of the total number of pupils registered on the Post-Primary Pupil database of the Department of Education and Science are recorded as being foreign students. These include refugees and asylum seekers. It is not possible at present to identify within this overall aggregate the number of overseas pupils who are attending fee paying second level schools. It is not known either what level of fee is being paid or whether the fee covers the real cost to the state of providing for their education.

With the exception of schools in Dublin and the surrounding area (including counties Louth, Meath, Kildare, Wicklow) enrolment patterns in post primary schools generally are in decline. Accordingly, it is unlikely that the admittance of overseas pupils would significantly impact on capacity within the system. A significant proportion of schools in the Dublin City Council area are in fact operating below capacity. Accordingly, as a general principle, admitting overseas pupils to these schools is unlikely to impact adversely on demands for accommodation. As a matter of policy, the Department of Education and Science could approve the admittance of overseas pupils to second level schools generally subject to it not leading to demands for additional accommodation or teachers and secondly subject to priority of access being afforded to pupils of families resident in Ireland.

On the other hand it is important to note that many post primary schools require substantial capital investment to modernise and that it will be a considerable number of years before all schools are brought up to a modern standard. From a school planning perspective, a policy of increasing the number of overseas fee paying pupils could create undesirable pressure on the capital budget.

Following its consideration of the above issues the Group concluded that it was unable to recommend an immediate initiative in relation to expanding the intake of overseas second-level pupils on the basis of full cost recovery. It recommends that the Department of Education and Science carry out a more detailed examination in this area with particular regard to the potential for expansion in the numbers of overseas pupils, the potential costs arising and the appropriate level of fee that would be required to meet the costs. It would also be necessary in this regard to take full account of any likely impact such an expansion would have on the capital budget of the Department and the capacity to absorb it in the short to medium term.

International students coming to Ireland for Further education in Post Leaving Certificate courses

Non-EEA nationals enrolling on a Post Leaving Certificate course are required to pay a fee of €3,600 to cover the costs of tuition, administration and the normal student support services provided by the school or college. The present fee was set in the late 1990s and is in need of review. It is estimated that there are over 500 such students currently enrolled on PLC courses and that this number is growing each year. It is understood that the students are generally accommodated in classes which have not filled to capacity.

There is a growing market for these students. Currently the market is accessed through national advertisements in Irish newspapers, the websites of the larger PLC colleges and word of mouth from students returning to their native countries. The students tend to enrol on PLC courses which are internationally accepted and have high level quality assured certification – FETAC, BTEC and/or industry led certification. The course content and levels of certification awarded are highly sought after by industry and commerce in the students’ native countries.

These students make an important contribution to the Irish economy. Their enrolment in a local PLC/FE College brings an increase in economic activity to the local area as the students need accommodation, and generally do their shopping and socialising locally. A survey of such students in Dun Laoghaire Senior College revealed that on average each student incurred expenditure of about €18,000 to €20,000 per annum.

The Group considers that within the framework of existing Government policy the Department of Education and Science should, in liaison with the providers, explore the scope for expanding the numbers of overseas students in the PLC sector while ensuring full cost recovery from the fees charged. It would also be necessary to ensure that such expansion would not militate against affording priority of access to students of families resident in Ireland.

English language courses

The EFL is recognised as making a valuable contribution in terms of number of visitors it attracts to Ireland and the level of foreign earnings it generates. The Group consider that this sector should continue to play a significant role into the future underpinned by the recommendations it makes later in this report in relation to regulation and quality assurance.

Higher Education

Higher Education in an international context encompasses a number of activities which can be summarised as follows (GATS description in brackets):

- Students travelling overseas to study (consumption abroad)
- Professors and lecturers moving abroad to deliver programmes for their institutions (movement of persons)
- The establishment abroad of campuses and the provision of courses in overseas locations (commercial presence)
- Distance education including e-learning (cross-border supply)

These activities are interlinked and may take place concurrently or develop in stages. Students travelling abroad is the most substantial both internationally and in Ireland. This is also the area which has attracted most policy attention and for which data are the most readily available.

Fewer data are available for cross border supply of education services or commercial presence although these forms of provision appear to be growing rapidly and potentially represent large markets. Offshore campuses and distance learning are often attractive to

students because they involve lower costs than studying abroad. Australia is an example of the growth in the delivery of tertiary education in the students' home country. For example, between 1996 and 2001 enrolments in offshore campuses and distance learning increased from 24% to 37% of all international students enrolled in Australian institutions. Most of these students attended offshore campuses (28% of all international students in 2001) and relatively few (9% of all international students) were enrolled offshore in distance education, although the number doing so is increasing. More than half of the international students from Singapore and Hong Kong studying in an Australian institution are enrolled in offshore courses.

The United Kingdom also expanded its provision of courses overseas during the 1990s. In 1996/97 there were about 140,000 students enrolled in UK institutions overseas compared with about 200,000 international students in the UK in the same year. In Hong Kong the UK accounted for over half of the 575 foreign degrees offered through local private colleges, distance education centres or in partnership with local universities in 2000. One third of such degrees were offered by Australian institutions with the rest coming from other countries including the USA and mainland China.

The offshore delivery of educational services is also facilitated by information and communications technology (ICT) which complements the traditional face-to-face teaching with interactive ways of learning and disseminating material. Virtual education institutions which teach predominately via ICT are regarded as having a high growth potential especially in the markets for corporate training and education for adults.

Some traditional universities have created for-profit arms to develop and respond to the market in this area. A number of them have also created consortia and partnerships designed to address international demand through new modes of delivery. An example of this is Universitas 21 which brings together eighteen established universities from ten countries to pursue global initiatives that would be beyond their individual capabilities.

Notwithstanding these developments most countries are mainly interested in that part of the market which involves students traveling abroad to pursue their studies. Many institutions may also be wary of the perceived risks associated with the new modes of delivery. These risks might involve potential damage to academic reputation and the possibility of considerable financial losses. In that regard very few e-learning initiatives in higher education have so far been successful and knowledge about the costs and benefits is very limited.

The group considers that as part of the promotion and marketing of international education this area needs to be closely considered. As a first step it would be appropriate to have research commissioned to provide information and guidance on best practice for institutions which see potential for development and expansion of their educational services in this area. In this regard it is open to any higher education institution at present to develop an e-learning course, subject it to appropriate validation and quality assurance procedures, either within a University, or through HETAC, and to commence registration and education of students.

Promoting Ireland

Existing structures for promoting Ireland as a centre of educational excellence

At national level the main agencies involved in promoting and marketing Ireland abroad are International Education Board Ireland (IEBI), Enterprise Ireland and Fáilte Ireland. The Department of Foreign Affairs also assists in the promotion of education exports through its network of embassies and consulates.

The overall objective of the IEBI is to facilitate and support the development of Ireland as an international education centre. The Board currently has representation from all interested sections of Irish education, higher education (public and private), language schools and from other Government Departments and agencies including Enterprise Ireland and Fáilte Ireland.

Specifically the Board's current mandate is:

- To promote Ireland as a quality destination for students and trainees
- To promote and support the international activities of Irish Education institutions
- To act as a national point of contact and referral to and from Irish suppliers of educational services and the international marketplace
- To promote Irish education expertise as a valuable resource for international institutions development agencies and governments
- To liaise with education interests and governments to identify and remove barriers to the development of the international education sector.

Enterprise Ireland (EI) encourages the international development of the third level sector through the provision of market development support such as trade fairs in and missions to developing markets in Asia and through strategic initiatives aimed at supporting the colleges in their long-term planning to grow their overseas student numbers. In the EFL sector Enterprise Ireland supports individual schools through the provision of financial and other strategic company support. Where appropriate EI facilitates the use of its relevant overseas offices to support the internationalisation of both sectors.

Fáilte Ireland assists the promotion of the EFL sector through support for the MEI-RELSA product marketing group and overseas tourist offices.

The Advisory Council for English Language Schools (ACELS) is a company limited by guarantee which operates under the aegis of the Department of Education and Science. Its objectives are to:

- Control standards in accreditation of EFL schools and courses
- To make recommendations to the Department of Education and Science on the granting of, and continuance of official recognition of approved English Language Schools
- Control standards in teacher training, both initial and in-career, for EFL teachers in Ireland, and to maintain a register of such qualified teachers
- Ensure the establishment of appropriate tests for EFL students and to control standards in the certification of their performance; and
- Promote an Irish cultural dimension in EFL courses, particularly in the textbooks used in its schools' networks

Proposed new arrangements

The Group was mandated to consider the possibility of establishing a single agency for the promotion of Ireland as a centre of educational excellence. The group recognises that both Enterprise Ireland and Fáilte Ireland have invaluable expertise and an existing network of offices, which enable them to promote Irish education as an important part of their general marketing and promotion efforts.

The Group considers that the important initiative of the Minister for Education and Science to regulate, standardise and plan the internationalisation of education services should be comprehensive in nature. The establishment of a single agency to co-ordinate policy and the promotion of Ireland as a centre of educational excellence was strongly supported in the majority of submissions received by the Group. It is necessary that all parties and agencies involved work together within an integrated and cohesive structure in order to achieve agreed common goals and objectives for the sector. A comprehensive and co-ordinated approach is vital.

Role, Functions and Composition of New Body – Education Ireland

The Group considers that a new body to be called 'Education Ireland' should be established with the following functions, to be carried out as appropriate in liaison with relevant statutory agencies and providers:

- Coordinate policy development and advise the Minister for Education and Science on policy for the development of international education including such issues as target setting (number of students, nationally, by sector and broad discipline), national marketing plans, visa and work permit issues
- Prepare strategic plans for the sector which would be submitted to the Minister for Education and Science
- Award the Education Ireland Quality Mark on the basis of the arrangements set out in the section of this report dealing with quality assurance
- Operate the arrangements in relation to the development of a code of conduct for the pastoral care of international students and monitor compliance with the code
- Assume responsibility for the certification of EFL schools, including a mandatory framework and Quality Mark for courses of more than three months duration, and voluntary recognition / approval arrangements for courses of less than three months duration. Control standards of accreditation & teacher training and ensure the use and development of appropriate testing and certification instruments.
- Liaise, as appropriate, with FETAC, HETAC and institutions in relation to the recognition of further and higher education courses across a broad range of disciplines for the purposes of awarding the Quality Mark

- Commission and carry out necessary research including examination of international trends and developments in overseas student education with a view to identifying weaknesses and competitive threats and preparing appropriate recommendations for action
- Promote the Education Ireland Quality Mark and coordinate activities in relation to the promotion and marketing of Ireland as a destination for international education students

The Group recommends that this Education Ireland body be established as the central agency responsible for the promotion of Ireland as a centre of educational excellence. In order to ensure coherence, to avoid duplication and to harness the expertise in existing organisations, the group proposes that all personnel in IEBI and ACELS should be incorporated into the new body – Education Ireland.

In this regard, Enterprise Ireland and Fáilte Ireland should work in close co-operation with the new body – Education Ireland. To ensure the optimum synergy and cooperation in marketing and promotion Education Ireland should establish protocols with Enterprise Ireland and Fáilte Ireland. Provision should also be made for a review of the protocols after an agreed period.

Individual institutions should also be encouraged to continue marketing and promoting their own programmes under the Education Ireland brand. In the light of the Board's responsibility in relation to national marketing plans, the institutions should cooperate in the provision of necessary data and information.

New Structures

It is envisaged that the new agency will be led by an Education Ireland Board, which should be as small in numbers as possible to allow for more effective working. It is considered that it would be necessary to include senior representation from Enterprise Ireland, Fáilte Ireland and the Department of Education and Science on the board. The other representatives would be appointed by the Minister of Education & Science on the basis of the knowledge, experience and expertise they could bring to the task.

As the EFL sector is so central to the internationalisation of educational services, as a sector in its own right and as an educational basis for further studies, Education Ireland through the incorporation of ACELS will have a direct role in the accreditation of English language institutions and courses. The Group considers that Education Ireland's direct role in the accreditation of the EFL sector should be mediated through an expert / specialist sub-committee to advise the Board.

The process for awarding the quality mark to further and higher education programmes (in public and private institutions) across a broader range of disciplines should be conducted by the Board in close co-operation with agencies such as FETAC, HETAC, HEA and the relevant institutions which make their own awards under statutory provisions. It is considered that

these arrangements should apply to all educational programmes of at least three months duration. Separate recognition / approval arrangements operated by Education Ireland will continue to apply for courses in the EFL sector of less than three months duration on a voluntary basis.

In recognition of the importance of the development of quality educational services for international students in Ireland, the Department of Justice, Equality and Law Reform should have discretion, supported by a regulatory framework, to establish accelerated visa application procedures for those applying to pursue their studies in a recognised school in receipt of the Education Ireland Quality Mark. Visas would not be issued for study in institutions which do not have the Quality Mark. It is envisaged that Education Ireland will work closely with the Department of Justice and with Immigration Officials in maintaining a shared up-to-date list of institutions in receipt of the Quality Mark. This list will be reviewed regularly in order to ensure that the highest standards of education are available to those coming to Ireland for study purposes.

The group considers that Education Ireland should be established on a statutory basis. Such an approach will underline the importance that the Government attaches to the role and functions of the body and it will also give greater stability and clarity going forward. As decisions by the new body in relation to the award of the quality mark will have an important bearing on visa/immigration issues it is considered that this lends further weight to the recommendation for underpinning legislation.

Structure and Financing of Education Ireland

At present IEBI and ACELS employ seven staff of whom two (in IEBI) work on a part-time basis. The 2004 combined grant allocation from the Department of Education and Science to IEBI and ACELS is €509,000. The total combined expenditure of the bodies is approximately €720,000 per annum.

In the short term it is envisaged that the new body may require nine fulltime equivalent posts to carry out the functions assigned to it. Using civil service posts the grading structure and assigned functions might be as follows:

1 Principal Officer (Finance scale) - Chief Executive

1 Assistant Principal (Finance scale), 2 Higher Executive Officers, 1 Clerical Officer

Responsibilities: Research, strategic plans, promotion and marketing, administration and finance.

1 Assistant Principal (Finance scale), 2 Higher Executive Officers, 1 Clerical Officer

Responsibilities: Quality mark, code of conduct, certification and standards, liaison with certifying bodies.

This does not purport to be a definitive view about the necessary staffing or structure that would be appropriate for the new body. The Board and Chief Executive will obviously wish to give consideration to these issues when they take up their duties. It is considered in any event that the staffing numbers and structure should be subject to review within two years in the light of experience.

On the basis of the above staffing and the functions to be carried out it is estimated that the annual budget for the new body may need to be increased initially to €1 million. It is considered that the additional costs arising from the increase in staff should be met in full by an increase in the body's own income to be secured by an increase in fees charged.

It is also considered that the medium-term aim for the organisation should be to become self-financing, through a combination of a gradual increase in fees and from extra revenue generated by expansion in the market as a result of the activities of Education Ireland.

A key initial task for the Education Ireland Board will be to map out how the body can become self-financing.

Quality Assurance

Quality

Quality and the pursuit of excellence are embedded in the tradition of education internationally. Over the centuries, education has been advanced through a history of continuous development, adaptation and improvement. The integration of these successive advances has formed a basis for the evolution of knowledge. In contemporary times, this has been formalised through the emergence of quality assurance and quality improvement procedures and through formal accreditation and mutual recognition measures. An increasing international policy focus on quality and quality assurance in education has been manifested in a range of activities and initiatives at European and wider global levels. This has generated an enhanced awareness and understanding of quality issues among education providers and learners internationally.

A key element in attracting learners to a country to pursue their education is the evident quality of the educational experience. In this context, consideration of quality is not simply confined to the academic standards of a programme but also encompasses wider dimensions of the individual's educational experience, based on the quality of wider supports and services. These would include, for example, orientation, accommodation, health and welfare services. The existence of strong quality assurance arrangements is fundamental to any strategy for marketing Irish educational services internationally.

Quality assurance in the higher education sector

Diverse quality assurance arrangements exist within the higher education sector in Ireland. These are outlined in more detail in appendix 1. In essence, awards and quality assurance in the university sector are covered under the Universities Act 1997 and awards and quality assurance in the Institutes of Technology and in private colleges are covered under the Qualifications (Education and Training) Act 1999. The National Framework of Qualifications, which has been publicly launched in October 2003, provides a mechanism for the recognition of learning achievements within the State and also signals a guarantee of the quality of awards that are made. framework is being implemented on a phased basis over the period to 2006.

The quality assurance procedures provided for under the legislation govern the evaluation of both educational and related support services for all students. The use of a quality mark by higher education institutions in respect of the delivery of higher education programmes to international students should, therefore, be based on the implementation of existing quality assurance procedures within the existing quality assurance framework for the sector. It is not considered either appropriate or necessary to develop a separate quality assurance system or quality assurance procedures in relation to providers already complying with university, HETAC or FETAC quality assurance arrangements.

In relation to the broader dimension of student services a number of countries have developed a code of practice or conduct for the pastoral care of international students and access to the national brand/quality mark is contingent on satisfying the requirements in relation to academic standards and also the code.

It is considered that similar arrangements in relation to the code of practice should apply in Ireland as a necessary part of protecting the quality mark and enabling us to compete effectively with other countries in the international student market. It is recommended therefore that a code of practice should be developed in consultation with the higher education institutions and be subject to the approval of Education Ireland. Once approved by Education Ireland, signatories to the code would be eligible to avail of the quality mark in marketing their programmes and recruiting international students.

The code should set standards for higher education institutions to ensure that

- International students are recruited in an ethical and responsible manner
- The particular needs of international students are recognised and provided for in respect of orientation programmes, advocacy arrangements, assistance in adapting to a new cultural environment, accommodation, health etc.
- International students have ready access to comprehensive and accurate information
- Students are provided with full information prior to entering into any commitments
- Fair and equitable internal procedures are available for the resolution of international student grievances

It is also recommended that institutions should be required to report annually in a standard format on the operation of the code including the number and extent of complaints received from or on behalf of international students and the number of complaints that were not satisfactorily addressed. The operation of the code would be reviewed annually in the light of these reports. In the event of unsatisfactory performance in the operation of the code an institution may be removed from the register of signatories to the code. In recognition of the importance of the development of quality educational services for international students in Ireland, the Department of Justice, Equality and Law Reform should have discretion

- i. to establish accelerated visa application procedures for those applying to pursue their studies in a recognised school in receipt of the Education Ireland Quality Mark and
- ii. to refuse visas for study in institutions that do not have the Quality Mark

As self-accrediting bodies, the universities will continue to attest to the quality of any EFL programmes delivered directly by them. The basis on which they are accredited in this area should, at a minimum, be consistent with ACELS standards.

Quality assurance in the EFL sector

The EFL sector in Ireland is subject to a voluntary registration system operated under the aegis of the D/Education, by the Advisory Council on English Language Schools (ACELS).

Quality assurance in the EFL sector is effected through the work of ACELS. In 2003, for example, ACELS carried out 37 full inspections, 35 spot checks, examined 6 new organisations and took a range of disciplinary actions designed to maintain standards. The total number of organisations recommended for recognition in 2004 is 98 (additions may be made).

ACELS through its Board of Directors determines the criteria necessary for schools to qualify for recognition from the Department of Education and Science as EFL providers. Schools go through a process of inspections prior to initial recognition and are subject to periodic inspection thereafter. Schools operating in the sector are not obliged to apply for recognition and those that choose not to apply are not subject to the standards that ACELS apply. ACELS submits a list of qualifying schools to the Department of Education and Science for approval by the Department, which then issues the approval certificates to the schools.

It is recommended that this function of recognition / approval on a voluntary basis should be carried out by Education Ireland when it is established, for EFL courses of less than three months duration. In addition an appropriate code of practice should also be developed for EFL schools with provision for similar reporting and sanctions. For courses of longer duration, EFL schools should be eligible to apply for the Education Ireland Quality Mark.

Regulation of EFL Sector

Over the years, there have been calls from MEI-RELSA, on behalf of the recognised EFL schools, for mandatory regulation of the EFL sector in Ireland. These calls have intensified in recent times as the recognised schools have been pressurised and their collective reputation undermined through the emergence of questionable operations which have sought to generate a lucrative income stream by using the EFL umbrella to facilitate evasion of visa/immigration controls.

The Department of Justice, Equality and Law Reform has also argued that the introduction of a mandatory regulation system would strengthen its hand in dealing with visa applications in relation to non-recognised schools. The issue of mandatory regulation is under discussion in both Australia and Britain and has its own complexities. Any system of mandatory regulation would need to be framed in such a way as to withstand legal challenge and regulatory proposals would need to be cleared by the Attorney General.

The Group supports the concept of mandatory regulation for the EFL sector for courses of more than three months. It recommends that the Minister for Education and Science make arrangements for an in-depth examination of the issues involved in consultation, as appropriate, with interested parties with a view to preparing draft Heads of a Bill to underpin the development of a regulatory framework.

The Group considers that that it would be desirable in terms of speed and efficiency to base any mandatory regulation system around the existing ACELS system to the extent appropriate.

Visa, Immigration & Working Arrangements

Visa and Immigration Issues

The Group notes the concerns which have been expressed by a number of contributors to the consultation process regarding the interface between the visa/immigration system and the marketing of Irish education abroad especially in key target markets. These concerns relate in particular to the time taken to process visas, communications with visa/immigration administration, perceived inconsistency in procedures and the high refusal rates for certain categories of visa applications.

Visa requirements are imposed on nationalities which are recognised from experience as posing an immigration risk, such as persons attempting to travel for reasons other than those stated, or attempting to overstay in the State after their permission to remain has ended. Security issues may also arise in certain types of case. The quality of Ireland's education product is not the sole factor attracting visa applications from visa required students wishing to come to Ireland. This must be taken into account by educational providers in determining their marketing strategies.

The vast majority of non-national students who enter the Irish education system are from countries (over 80) whose nationals do not require visas. Students from all EU countries as well as Norway, Iceland, Liechtenstein and Switzerland, enjoy what amounts in large part to a legal entitlement to enter the State for study purposes. Therefore, the visa system will not impact at all on potential students from all of Ireland's European and North American neighbours and such students may travel to Ireland with minimal formalities.

However, the coherence, transparency, efficiency and effectiveness of the visa system is a vital issue in respect of some of the main growth markets. The Group recognises the need for a clear and consistent Government policy governing immigration for study purposes including visa issues which, in addition to security issues, takes account of national economic interests and is consistently applied across all parts of the visa/immigration system.

Improving the visa service

The Department of Justice, Equality and Law Reform and the Department of Foreign Affairs accept that the visa service provided falls short of what is desirable and are working to improve the position.

This is being done against a backdrop of a massive increase in demand for visas for all purposes in recent years. In the year 2000 a total of 61,000 visas were issued. This had increased to 105,000 by 2002 and 120,000 by 2003, nearly double the 2000 level. The number processed by Department of Justice, Equality and Law Reform personnel has increased from 17,219 in 2000 to 47,666 in 2003. In the context of this rapid growth in visa applications, the Department of Justice and the Garda national Immigration Bureau have become increasingly concerned at the level of abuse of the system.

An important recent development was the establishment of visa offices in Beijing and Moscow in 2002. This further “decentralisation” of decision making to those locations has enabled the visa staff to bring more local knowledge to bear in their assessment of applications and to give a more direct service to applicants and to educational establishments which have been attracting students from China and Russia. There has been a generally positive response from educational establishments to this development.

Proposals for further improvements in the visa system

During 2003 the Minister for Justice, Equality and Law Reform in co-operation with the Minister for Foreign Affairs brought proposals to Government for further improvements in the system using the possibilities presented by potential extra income to be generated by the increase in visa fees announced in the Budget for 2004. These included

- a) the development of a computerised visa system accessible to staff in the Department of Justice, Equality and Law Reform, the Department of Foreign Affairs and the Garda National Immigration Bureau,
- b) the provision of additional staff in both the Department of Justice, Equality and Law Reform and the Department of Foreign Affairs, when and if permissible under Government policy,
- c) further delegation of visa processing to embassies following the model of what has been done in Beijing and Moscow, and
- d) the possible contracting out of visa processing work.

Progress is being made in improving the system.

Preparations have commenced for the computerisation of the visa system. It is expected that the new system will be operational in 2005.

A pilot project for the contracting out of certain visa processing work is being considered for visa applications from India with a view to speeding up the processing of such applications.

In relation to the additional staff requirement the Department of Justice, Equality and Law Reform and the Department of Foreign Affairs are continuing to explore how this issue might be addressed in accordance with Government policy.

In this context the group notes that certain other countries have already invested heavily in improving their visa services as a necessary part of their strategy to expand their education services for overseas students.

Refusal of visa applications

A number of institutions have expressed concerns about the high rate of refusal of visa applications. The Department of Justice, Equality and Law Reform acknowledges these concerns but argues that its efforts to provide a more efficient system would be greatly facilitated by better quality applications.

The Department states that many applicants supply inadequate documentation, including forged documents about their employment in their country of origin, their financial resources and their intentions in travelling to Ireland. In the current international climate, the Department maintains that it is not acceptable for visa staff to be less rigorous in the interests of the perception of a better customer service.

Since the Irish visa system is largely paper based and predicated on credibility, staff cannot issue visas in circumstances where applications show evidence of attempted deception. Particular problems have been experienced in the education sector where unscrupulous agents have been used to create a fictitious profile for applicants. Greater vigilance by education institutions and closer cooperation with the visa services would enhance our capacity to minimise the scope for abuse.

Abuse of the student visa system

The Department of Justice, Equality and Law Reform has also outlined to the Group its concerns about the abuse of the student visa system by persons seeking to travel to Ireland for other purposes, particularly for employment. It is clear that certain educational institutions have been abusing the concession granted in 2000, which allows full-time students to work for up to 20 hours a week, in order to attract persons to Ireland ostensibly as students but in fact to enter employment. Such institutions have been able to market their “courses” to persons informing them that they will be able to work in Ireland.

The education services provided by such institutions are minimal or non-existent but the fees charged can be substantial. There has been a particular problem in the English language sector. In recent months, the Garda National Immigration Bureau has ceased registering students of a number of such institutions.

However, because of the lack of a compulsory and statutory registration system for educational institutions and the absence of a comprehensive system of monitoring standards in such institutions, there is no objective test which can be applied quickly by the immigration authorities to determine whether a school is genuine or not and this is compounded by the fact that new schools are being established on a regular basis to satisfy demand. It is likely that other such institutions continue to operate and that others will be established in future.

The Group considers that its proposals for a regulatory framework in relation to a register of institutions with the Education Ireland Quality Mark with strong linkages to the visa services will significantly improve and strengthen the procedures in place and reduce the scope for abuse.

Problem of “overstayers”

A number of contributors and the Department of Justice, Equality and Law Reform expressed their concerns about persons who come to Ireland as students remaining illegally after their courses have finished. It was a cause of concern to certain colleges that the authorities did not respond in a positive and active way to their notifying the immigration authorities of students who had completed their course or who had ceased to attend courses.

The Department of Justice, Equality and Law Reform considers that the solution to this issue must be based on prevention of illegal immigration through proper screening and selection of students. Deportation can only play a limited role as it is a labour intensive, time consuming and costly process.

It will be necessary to eliminate factors which tend to attract bogus students and educational institutions into the system. In this regard, the issue of access to work by students is a significant one.

A number of institutions also raised their concerns about students being allowed to renew their registration on the basis of continuing to enrol on additional short-term courses for prolonged periods. It was suggested that a maximum total enrolment period on such courses should be introduced. The Group concurs with this view and recommends that non-EEA nationals attending short-term courses should not be allowed to remain for more than eighteen months.

Access of students to work

A number of institutions spoke of the importance of the concession made in 2000 which allows full-time students to work for periods of up to 20 hours per week during term time and to work full-time during vacation periods. The Group recognises that this was very helpful to the marketing of Irish education services abroad. However, the Department of Justice, Equality and Law Reform maintains that it is now clear that this concession is a major factor in the abuses of the immigration system by certain educational institutions. There is evidence that certain institutions are operating flexible regimes under which minimum duration and attendance criteria are being flouted, apparently to avoid interference with students' working time.

It can be argued that students coming to Ireland for a long term course with high fees will require access to work to help fund them in their education. If the course and the student are both genuine, this is not a problem. However, in a short term course of up to 12 weeks there should not be such a need for students to have access to work. Such students already have to prove that they have access to funds to cover the costs of their stay in Ireland. If they are in Ireland for a limited period only, their focus should be on completing their studies, not on acquiring work.

The HEA commissioned report by Fitzpatrick Associates concluded that the provision of access to work without a permit being required is not only attractive to many students but popular with employers in labour intensive low wage sectors. It enhances the attractiveness of Ireland as an educational destination. Moreover, most major destinations have similar provisions.

The Department of Enterprise Trade and Employment has expressed its concerns at the unlimited access to the labour market which is currently afforded to students. While the work permit system is subject to restrictions in certain areas of employment, due to the availability of labour in those areas, such restrictions do not apply to students who can take up work in any sector. Following EU enlargement on 1 May 2004, it is expected that unskilled labour needs can be largely met from within the expanded EU.

Internationally, there are different approaches to this issue with most countries granting access to the labour market only to long term students, but only some doing so for those on short-term courses.

It is proposed therefore that an administratively workable arrangement should be developed which embodies the following principles:

- Access to the labour market should be confined to students on full-time courses of at least one year's duration leading to a qualification recognised by the Minister for Education and Science.
- Students on courses other than those specified above will not be allowed to renew their registration for a period of longer than 18 months.
- Students on preparatory courses (such as language courses) prior to enrolment on a full-time course of at least one year's duration leading to a recognised qualification, will not have access to work until they have been enrolled in the latter course.

Capacity at Third Level

Growth to date

Over the course of the 1990s, the third-level sector in Ireland has undergone sustained and continuing growth. Within the publicly aided sector, comprising mainly the Universities, the Institutes of Technology and the DIT, full-time enrolments have grown from 68,000 in 1990 to more than 130,000 in the current academic year. This growth in third-level enrolments has continued despite the demographic decline in Leaving Certificate candidates that has been a feature of second-level education since 1998.

This reflects a growing appetite for higher education from traditional entrants with greater proportions of Leaving Certificate students opting to pursue third level studies. The overall enrolment at third level has also been boosted by increases in enrolment from mature students, by increasing participation in post-graduate studies and to a lesser extent by minor increases in the take-up of third-level places among students from disadvantaged backgrounds and students with disabilities.

Future growth

Despite a continuing decline in the number of Leaving Certificate candidates into the near future, the Department of Education and Science anticipates continued additional demand for places in third-level colleges leading to a modest growth in overall enrolment numbers over the next number of years. International experience of demographic change in the 1980s and 1990s confirms the view that third-level institutions are adept at sustaining enrolment numbers in face of a declining youth population in most countries. It is anticipated that full-time enrolment in publicly aided third-level institutions will rise above 150,000 by the end of the current decade.

In short, the expectation of falling intake to third level on foot of declining births in the 1980s has not materialised in recent years and the projected numbers at third level do not indicate any substantial 'demographic dividend' on offer in the years ahead. Crucially, significant increases in the numbers of overseas students have not been factored into the projections of future enrolment referred to above. Given the necessity to ensure that the development of international educational services should not result in the displacement of students of families resident in Ireland entrants, capacity in excess of 150,000 full-time places may be required in the publicly aided third level sector by 2010.

International experience would indicate overall proportions of approximately 12-15% of international students on campus as an appropriate medium-term target for institutions. Steady progress towards the achievement of such targets within the publicly aided third level sector in Ireland would require overall capacity for approximately 160,000 students by the end of the current decade. While increases in the capacity of third-level institutions may require a certain amount of capital investment, substantial improvements in the capacity of the existing

infrastructure could be achieved through the adoption and incorporation of flexible timetabling, modular programmes and other crucial aspects of the lifelong learning agenda.

Investment

The development of higher education services for overseas markets needs to be on the basis of cultivating a quality, client-centred, product that will support sustainable long-term recruitment as opposed to any efforts aimed merely at utilising available short-term surplus capacity in a given area. Admission requirements for overseas students should be equivalent to those for Irish/ EU students. This is an important quality assurance safeguard.

Investment for future return must underpin any institutional international education strategies. Development efforts predicated on existing levels of staffing and infrastructure are likely to have a short-term lifespan. In this context, it is recommended that any surplus fee income derived from the attraction of overseas students should be retained for use at institutional level. In this regard it is considered that in quantifying the direct costs and overheads for the purposes of determining the surplus appropriate provision should be made for the cost of physical infrastructure and equipment. The use of this funding should be accounted for in line with normal requirements. In the case of the Institutes of Technology, including the Dublin Institute of Technology, the utilisation of any funding derived will require to be agreed with the Department of Education and Science in the context of the current annual Budgets and Programmes process.

In addition, it is recommended that a borrowing facility should be developed for higher education institutions wishing to develop facilities and market programmes for international students under the 'Education Ireland' brand. The borrowing facility should be developed and administered by the Higher Education Authority. It would be available for the specific purpose of generating resources for upfront investment in key elements of agreed institutional strategies for attracting overseas students. The cost of servicing the associated institutional debt would represent a first charge on the income generated from overseas student fees and this should be reflected in the fee levels set. Proposals for this facility should be developed by the Higher Education Authority in consultation with higher education institutions and presented to the Minister for Education and Science and Minister for Finance for agreement as a priority.

Private Colleges

No major capacity constraints are envisaged in the private sector, where investments will be made to meet existing and anticipated demand for international educational services. Private third-level institutions are already actively engaged in the provision of educational services to international students and it is expected that the group's proposals in this Report should support and promote the expansion of quality third-level educational services to international students from the private sector. Existing private institutions (and new institutions established in the future) will have full access to the new structures and the quality assurance framework that are proposed in earlier chapters of this document. They will also benefit from the marketing and promotion initiatives undertaken by Education Ireland.

Other Issues

Scholarships

A number of contributions to the review process recommended the introduction of scholarships for overseas students. It was also recommended that Ireland should consider models from some other strong recruiting countries which as part of their overall strategy have a competitive scholarship programme for talented international students.

The Department of Foreign Affairs operates a Fellowship Scheme for a small number of African countries which has as its primary objective addressing capacity deficits that hinder the attainment of development goals. The scheme is primarily oriented towards post-graduate students. The majority of students awarded scholarships under the Scheme have pursued their studies in third-level institutions in Ireland. Expenditure on the scheme in 2001 was just over €1 million.

In addition to the existing funding from the Department of Foreign Affairs the Group recommends that as part of the development of the international market educational institutions should be encouraged to collectively provide a scholarship fund from their international earnings which should be matched by the Exchequer initially up to a limit of €1 million per annum. This fund should then be used to grant scholarships on a competitive basis to talented overseas students for study in Ireland.

Attracting Overseas Researchers

Ireland's future economic development strategy will rely to a major extent on our ability to attract leading internationally mobile researchers. At its meeting in Lisbon in March 2000, the European Council agreed a strategic target for Europe to become the most competitive and dynamic knowledge-based economy in the world. An established priority for Ireland, as part of this wider EU objective, is to create a world-class research, development and innovation capacity and infrastructure. An EU target of 3% of GDP spend on research and development by 2010 was subsequently established by the European Council at its meeting in Barcelona in 2002.

The attraction of leading overseas post-graduate, post-doctoral and senior researchers into the Irish system is therefore a critical strategic issue for Ireland over the coming years. A range of measures aimed at enhancing the attractiveness of research careers, expanding research opportunities and at facilitating inward mobility of skilled researchers into Ireland have been identified separately by an inter-Departmental group charged with responsibility for preparing Ireland's national action plan for the achievement of the Barcelona target. The group recommends that Education Ireland should lend strong support to the research funding agencies and higher education institutions in their efforts to market Ireland internationally as a destination of choice for research careers and in implementing Ireland's national action plan to raise R&D intensity to 2010.

Clarity about total course costs

A lack of certainty over the level of fees that students coming to Ireland will be charged for their second and subsequent years of study has been identified as a potential impediment to the attractiveness of Ireland as a location for some. This arises as a result of the approach of Irish education providers to setting fees on an annual basis, with the level of year on year increases potentially varying depending on cost pressures. While the experience has been that the level of increase has been generally quite consistent, nonetheless, the unpredictability for potential students of total fee levels over the duration of a programme may militate against Ireland's ability to fully pursue the potential of some markets.

Institutions looking to attract overseas students should seek to provide advance information on fees packages that reflect the level of fee to be charged in each year of the programme. It is recognised that this will require an advance estimation of likely annual fee increases over the duration of the programme. Prudent management in relation to estimates of future costs and inflation would suggest taking a conservative approach involving a premium in return for the certainty being afforded to the student. However, the application of an excessive premium for this purpose should be avoided. The Group recommends that higher education institutions in particular should explore possible approaches in this regard with a view to being in a position to provide potential students with maximum certainty on costs over the full duration of their studies.

Racism

The issue of racist behaviour towards overseas students was raised in the course of the Group's work. Arising from commitments given by Governments at the United Nations World Conference Against Racism in South Africa in 2001, the Department of Justice, Equality and Law Reform is at present finalising a National Action Plan Against Racism (NPAR).

The twin aims of the NPAR are to combat racism and to develop a more inclusive, intercultural society. To fully realise these aims, the NPAR is based around the following five objectives:

- Effective protection and redress against racism
- Economic inclusion and equality of opportunity
- Accommodating diversity in service provision including Education.
- Recognition and awareness of diversity.
- Full participation in Irish society.

The Group considers that the plan and its objectives will provide a valuable basis for the development of better understanding of inter-culturalism and the benefits of diversity. In this way, it will make a significant contribution to combating racism. Adoption of policies in line with the plan should be considered necessary for obtaining the Quality Mark.

North-South

In keeping with the Government's commitment to prioritise North/South co-operation, to maintain current North/South activity and to identify new areas which could be taken forward, the Group gave consideration to the scope for enhanced co-operation in the attraction of overseas students. The scope for joint activity in this area is circumscribed by the fact that the Quality Mark is subject to a regulatory framework which cannot apply in Northern Ireland. Nevertheless, it is considered that the possibilities in this area need to be further explored in collaboration with the institutions. Accordingly, it is recommended that Education Ireland should consult with the various stakeholders to identify areas for further cooperation in international educational services.

Internet based information

Prospective overseas students are likely to rely on internet based information as a major resource in making decisions on destinations of preference. It is essential that Irish overseas education providers have a strong internet presence, providing credible, relevant up-to-date information. Education Ireland should work with providers of education services to overseas students in ensuring that the proposed Irish national portal for higher education and research is utilised to best effect in the provision of information for marketing Irish education services. This should be pursued as a priority. Education Ireland should work with providers of education services to overseas students in ensuring that this portal is utilised to best effect in the provision of information for marketing Irish education services.

Conclusion

There is significant scope for expansion in the internationalisation of educational services. Demand is increasing across all sectors and it is in the national interest that all parties and agencies involved work together within an integrated and cohesive structure in order to achieve agreed common goals and objectives. A comprehensive and co-ordinated approach is vital.

The establishment of a new body 'Education Ireland' will ensure this comprehensive and co-ordinated approach. Education Ireland will be the leading agency responsible for the promotion of Ireland as a centre of educational excellence and will work in partnership with educational institutions and relevant agencies to strategically plan for the expansion of quality educational services for international students.

A key element in attracting learners to a country to pursue their education is the evident quality of the educational experience. In this context, consideration of quality is not simply confined to the academic standards of a programme but also encompasses wider dimensions of the individual's educational experience, based on the quality of wider supports and services. These would include, for example, orientation, accommodation, health and welfare services. The existence of strong quality assurance arrangements is fundamental to any strategy for marketing Irish educational services internationally.

The quality of the educational experience of international students can also be undermined by the scope that currently exists for abuse of the student visa system. This can be addressed by the establishment of a statutory registration system for approved educational institutions and by restrictions on the arrangements for access to the labour market that apply to students from outside the European Economic Area. Improvements in the visa services are also necessary as an essential element in improving the overall experience of international students wishing to pursue their studies in Ireland.

The further development of the international education market will generate economic and societal benefits for the country. The presence of overseas students can contribute to promoting understanding, tolerance and cohesion both within Ireland and with other societies, cultures and countries. In this way, it represents a means of building up networks and contacts which can underpin the development of future economic, financial and political cooperation. It should also promote tourism in future years and assist in the promotion of Irish exports of goods and services. Education Ireland has an important task ahead and will require the co-operation of all stakeholders to ensure its success.

Appendix I

1 Quality Assurance framework for Higher Education

In the university sector the Higher Education Authority (HEA) has oversight of quality assurance while in the higher education sector outside of the universities the Higher Education and Training Awards Council (HETAC) is the competent body for almost all institutions, apart from Dublin Institute of Technology which makes its own awards.

The Universities Act, 1997, which came into force in June 1997, specifically requires each university “to establish procedures for quality assurance aimed at improving the quality of education and related services provided by the university”. This model, which recognises institutional autonomy, is one of self-assessment. It must include the evaluation, at least once in every 10 years of each department and, where appropriate, school of the university and any service provided by the university, by employees of the university in the first instance and by persons, other than employees, who are competent to make national and international comparisons on the quality of teaching and research and the provision of other services at university level. Furthermore, the procedures must include assessment by those, including students, availing of the teaching, research and other services provided by the university, and the procedures must provide for the publication in such form and manner as the governing authority thinks fit. A governing authority must implement any findings arising out of an evaluation carried out in accordance with procedures established under this section unless, having regard to the resources available to the university or for any other reason, it would, in the opinion of the governing authority, be impractical or unreasonable to do so. In addition, each governing authority must, at least every 15 years, having regard to the resources available to the university and having consulted with the Higher Education Authority, arrange for a review of the effectiveness of the procedures provided for by this section and the implementation of the findings arising out of the application of those procedures and publish the outcome of such a review.

In 2003, the Conference of Heads of Irish Universities published “*A Framework for Quality in Irish Universities – Meeting the Challenge of Change*”. One of the principal recommendations was the establishment of the Irish Universities Quality Board. Its aim, which builds on the legislative framework in the Universities Act 1997, is to promote best practice in quality assurance throughout the university sector.

On a wider level, the Higher Education Authority has a statutory role under the Act to assist the universities in the achievement of their objectives generally. Furthermore, it may review the quality assurance procedures established and may publish a report on the outcome of any such review – a process which is conducted in consultation with the National Qualifications Authority of Ireland. The first such review of quality assurance procedures will be undertaken by the Higher Education Authority in 2003/04. It also provides earmarked funding under the National Development Plan, to the universities to facilitate the development of quality

assurance procedures and processes. A particular objective of this funding is to facilitate the development of a sectoral approach to quality assurance, which can be benchmarked against best practice in Europe and internationally.

Quality Assurance in higher education institutions outside the University sector (such as Institutes of Technology) is subject to the oversight of the Higher Education and Training Awards Council. The Council's predecessor, the National Council for Education Awards developed the Quality Assurance system since 1972. It involves the review of institutions and programmes, including the accreditation of programmes. Programmes accredited included short cycle sub-degree programmes as well as those for Bachelor, Master and Doctor degrees. The Council has established the ECTS system as the standard credit system in the extra-university sector. The Council is a member of the European Network for Quality Assurance in Higher Education, the European Accreditation Network, the Joint Quality Initiative and as host of the 2003 biennial conference of the International network of Quality Assurance Agencies in Higher Education organised the European Regional Meeting of that body.

The Qualifications (Education and Training) Act 1999 established the National Qualifications Authority of Ireland, Higher Education and Training Awards Council and the Further Education and Training Awards Council. The two awards councils are responsible for evaluating and agreeing the quality assurance procedures of providers whose awards are accredited by the Councils, for monitoring the quality of programmes, for ensuring that arrangements for assessment are fair and consistent, and that provision for access transfer and progression of learners complies with the procedures established by the Authority. The procedures must include regular evaluation by national and international experts and evaluation by learners. The provider must implement any of the findings arising from the application of the procedures that the awarding council determines. The effectiveness of the procedures must be reviewed on a regular basis by the council. In addition, the Act also requires the Dublin Institute of Technology to agree quality assurance procedures with the National Qualifications Authority of Ireland, which will include the regular evaluation of its programmes of education and training and ancillary services by national and international experts and learners. The Authority will consider the findings arising out of such evaluations and may make recommendations to the Dublin Institute of Technology, which it will implement. The Authority will also review the effectiveness of these procedures. The National Qualifications Authority is responsible for establishing and reviewing the policies and criteria on which the National Framework of Qualifications is based, reviewing the functioning of the awards councils, determining the procedures to be implemented by providers for access transfer and progression of learners, and reviewing the implementation of these procedures by the universities at least once every 5 years.

Appendix II

Submissions received by the Working Group on the Internationalisation of Education Services

1. Mr. Jack Healy, StudyGroup, 18 South Great Georges Street.
2. Mr. Seán O’Foghlú, NQAI
3. Ms. Mary Ruane, Director, Applied Language Centre, UCD
4. Michael McGrath, Director, Conference of Heads of Irish Universities (CHIU)
5. Mr. Simon Grehan, Hibernia College, Fitzwilliam Square
6. Dr. Frank McMahon, Director, Academic Affairs, DIT
7. Mr. John Chrimes, An Gorteen, Co. Galway
8. Ms. Áine Ní Chonaill, Immigration Control Platform
9. Mr. Paul Kennedy, International Study Institute
10. Mr. John Lynch, Chief Executive, International Education Board of Ireland
11. Brother Bernard Hayes, Christian Brothers, Zambia
12. Mr. Mervyn McKeown, Fitzwilliam Institute, Blackrock
13. Ms. Rosemary Quinn, Chairperson, Centre of English Studies, Dame Street
14. Mr. Jonathon Harris, Director, Innovative Public Sector Solutions, Cornwall
15. Ms. Anna Cunningham, Shannon College of Hotel Management
16. Mr. Jim Ferguson, Advisory Council for English Language Schools
17. Mr. Peter O’Mahony, Irish Refugee Council
18. Ms. Hilary McElwain, MEI-RELSA
19. Dr. Wendy Cox, Chief Executive, Irish Council for International Students
20. Mr. Liam O’Dochartaigh, University of Limerick
21. Ms. Gail Brady, HETAC
22. Dr. David Barnwell, The Linguistics Institute of Ireland
23. Ms. Mary Stenson, Griffith College Dublin
24. Mr. Brian Mulligan, Sligo IT
25. Ms. Margaret Cohen, Council of Directors of Institutes of Technology

Appendix III

Interdepartmental Working Group on the Internationalisation of Education Services.

Chair: Mr. Noel Dempsey, TD, Minister for Education and Science
Mr. Paddy McDonagh, Dept. of Education and Science
Mr. Seán Harkin, Dept. of Education and Science
Mr. Kevin McCarthy, Dept. of Education and Science
Ms. Ruth Carmody, Dept. of Education and Science
Mr. Muiris O'Connor, Dept. of Education and Science
Mr. Ken Thompson / Mr. Peter Ryan, Dept. of Foreign Affairs
Mr. Paul Burns, Dept. of Justice, Equality and Law Reform
Mr. Francis Rochford, Dept. of Arts, Sport and Tourism
Mr. Pat Hayden, Dept. of Enterprise, Trade and Employment
Ms. Anne Nolan / Mr. John Conlon, Dept. of Finance

Secretary: Mr. Paul Dunphy, Dept. of Education and Science

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