

# *Lead or Follow?*

*The global challenge for  
Irish higher education*

PROSPECTUS SURVEY  
OF THE IRISH HIGHER  
EDUCATION SECTOR 2007  

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SUMMARY

# Introduction

This document provides an overview of the findings from a survey on the Irish higher education sector, carried out by Prospectus in Spring 2007, together with recommendations on the future roadmap. Detailed findings are outlined in a full report entitled *Lead or Follow? The global challenge for Irish higher education*.

The role of third and fourth level education in enabling Ireland to move up the value chain towards a knowledge economy is recognised by the Government and increasingly the development of a strong, internationally reputable higher education sector is recognised as a strategic imperative.

It is generally acknowledged that Irish universities and institutes of technology have performed exceptionally in providing excellent undergraduate and graduate learning for Irish students despite many decades of severe under-funding. This performance has been recognised by the increased rankings of the higher education sector in the recent THES publication. Beginning with the launch of PRTL in 1999, followed by the establishment of SFI and launch of SIF funding, the environment for third and fourth level institutions has been strengthened considerably in recent years. While this has brought significant opportunities in teaching, learning and research, it has also brought considerable challenges, and has demanded the introduction of new ways of planning, organising and managing third and fourth level education.

## Rationale for the report

In recognition of the challenges currently facing third and fourth level education institutions, Prospectus recognised that there would be value in capturing the climate, concerns and ambitions of the Irish higher education sector at this time. The objectives of the survey are therefore to:

- Provide a picture of the current position of the Irish higher education sector, critical issues and views of opinion leaders across the sector.

- Identify and understand the key strategic and operational issues facing the Irish higher education sector in the future.
- Inform the advancement of third and fourth level education in Ireland, in a global context.

## Why the report is different?

- It is the first report of its kind in Ireland designed to provide a strong and timely poll of views in Ireland's third and fourth level sectors.
- The survey addresses a broad selection of topics ranging from a macro-level overview of the sector to more micro-level areas such as policy, governance, teaching and learning, fourth level, management capacity and organisation development.
- The report captures the views and opinions of major stakeholders and system leaders in Irish higher education.

## Research methodology

A postal survey was conducted in Spring 2007. Questionnaires were sent to key stakeholders across the sector including: system and institute leaders; senior academic and administrative personnel in universities and institutes of technology; directors and principal investigators in the major research institutes; relevant Government departments and state agencies; private colleges and philanthropists in Ireland.

A shorter survey consisting of selected questions on the higher education landscape was circulated to members of Irish industry via an electronic survey of members of the American Chambers of Commerce.

The survey was circulated to over 600 individuals, with a response rate of 29%. To support the findings we have also presented some representative quotes from respondents.

The full survey is available on-line at [www.prospectus.ie/survey](http://www.prospectus.ie/survey)

## Profile of respondents

Respondents represented key stakeholders in higher education in Ireland. The respondent profile was as follows:

- 46% university respondents (academic and administration)
- 24% institute of technology respondents (academic and administration)
- 17% industry respondents
- 8% research respondents (CEs of research institutes and principal investigators)
- 5% Government respondents (Department of Education & Science, Department of Enterprise, Trade & Employment and state agencies).

Prospectus would like to acknowledge the time, effort and contribution of all survey respondents who participated in this research.

## The survey

The survey asked over 100 questions relating to aspects of higher education as it pertains to the Irish experience. These questions were divided into six sections:

**Section 1** Irish Higher Education Landscape

**Section 2** Irish Higher Education in an International Context

**Section 3** Governance and Management

**Section 4** Teaching and Learning

**Section 5** Fourth Level Ireland

**Section 6** Development of Human Capital and Excellence.

The survey used a six-point Likert scale in order to ascertain the respondent's degree of agreement or disagreement with a particular statement.

The findings from this survey are presented in the following context:

- The survey was carried out independently by Prospectus. It has been fully funded by Prospectus, and all individual responses will remain confidential.
- Survey findings are presented without any statistical or other manipulation of data. Figures are rounded to whole numbers, as such a rounding of plus or minus 1–2% has occurred in some of the graphs.
- Prospectus' views on the challenges for third and fourth level education in Ireland are presented in this summary document. We welcome each reader to make his/her own analysis and draw his/her own interpretation of these findings.

## SUMMARY

# Lead or Follow? The Global Challenge for Irish Higher Education

“As for the future, your task is not to foresee it, but to enable it.”

ANTOINE DE SAINT-EXUPÉRY

### HIGHER EDUCATION IS A GLOBAL CHALLENGE

The Irish higher education system has played a pivotal role in enabling Ireland to be the force it is in the world today. However, the road ahead will be much more challenging as the world of higher education globalises at an increasing rate, the competition for talent and resources intensifies and our increasingly diversified and sophisticated society presents a new and constantly evolving dynamic.

### Influencing global trends

Ireland's future will depend on our ability to respond more proactively to exploiting emerging opportunities, such as the shift in economic power to Asia in terms of investment and output. As the global technology revolution gains pace, crossing national borders and scientific disciplines – biotechnology, nanotechnology and more will reshape industries and our daily lives. Exploding connectivity and information channels are making knowledge creation a global imperative, but gaining an edge and protecting knowledge will be difficult. These are just some of the trends that are reshaping our lives and the way in which we learn and apply that learning will be one of the most important factors in our success.

Economic success is a major determinant of the quality of a society, but it is not the only factor at play. The engagement of each individual with the education system, people's access to learning opportunities and the development of young people who have the ability to think independently and make a positive contribution to Irish society are at least as important as developing our economic wealth.

Education is an international issue, measured according to global parameters in the same way as our economy is. However they are viewed,

international ranking tables are most likely here to stay and will increasingly determine the reputation of our academic institutions. As this becomes the case, being the 'best in Ireland' may no longer suffice for ambitious institutions, academics or students if Ireland does not stand well against the best in the world.

If we look globally, it is clear to see how the landscape is changing and therefore the kind of long-term vision that our leading institutions should be considering. Among the major global challenges identified by IMD<sup>1</sup> were many which might directly inform the direction and choices of our higher education institutions. The big issues include: climate change and the need to innovate new environmental strategies and technologies; life and human sciences as our world population continues to get older and live longer; the debate between innovation and invention and rights to intellectual property against a drive for a more open, collaborative and altruistic society; the battles between value systems within society; and the well-recognised challenges such as the decline of manufacturing as an economic cornerstone, the emergence of new global centres for research and technology (India, China and Russia) and the emergence of 'cheap brain power' within these economies.

<sup>1</sup> IMD World Competitiveness Centre, (2007) *Anticipating the Future*

### Irish higher education today

Depending on where you look or who you speak to, the Irish higher education system is (a) the healthiest it has ever been and the envy of many comparable nations or (b) suffering from years of chronic under-funding and genuinely struggling to achieve policies and targets without having the resources to do so. The statistics show both descriptions to be the case.

Although emerging from a prolonged period of serious under-funding, Irish higher education has come a long way in the past decade

At third level, 45,000 additional places have been created since 1997, so that in 2004, Ireland was placed ninth in a world health report ranking of higher education attainment, ahead of countries such as the UK, Australia, New Zealand and USA.<sup>2</sup>

The Government recently injected €230m of research funding into Irish third level institutions

Since PRTL was launched in 1998, over €600m has been awarded to institutions to develop their research infrastructure. It has resulted in 97,000sqm of state-of-the-art research space, and helped leverage €620m in Irish and European research funding.

Funding agencies such as SFI, IRCSET, IRCHSS and HRB enable the advancement of institutional research

This funding provides opportunities for excellent individual or research teams to carry out their research in Irish institutions. Initiatives such as CSETs (Centres for Science, Engineering and Technology) provide meaningful and innovative mechanisms to enable excellent individuals or research to happen within a collaborative academic environment where industry plays an active role.

<sup>2</sup> Mary Hanifan, launch of PRTL, 2007

The National Development Plan (2007–2013) has committed €8.2bn for research and development

The Strategy for Science, Technology and Innovation provides the strategic focus and direction to enable the greatest return from this funding.

The HEA's Strategic Innovation Fund (SIF) is supporting organisational development and the enhancement of teaching and learning within our institutions

Over two cycles of SIF, the Government has so far assigned, across institutions, €40m and €130m (pending). A third cycle of €130m is due to follow in 2008.

Almost all additional funding has been provided in a 'targeted' form at the expense of the core 'recurrent' grant

Irish higher education institutions consistently report that the value of their 'core' or 'recurrent' grant does not match the real cost of educating students or maintaining their physical resources. Inevitably, this forces corners to be cut in teaching and learning and many undergraduate facilities are perceived to be 'creaking at the seams'. While the Recurrent Grant Allocation Model (RGAM) has brought greater transparency to higher education funding, it cannot make up for apparent shortfalls in the core grant or the absence of multi-annual funding which prevents institutions from forward planning in a meaningful way.

Despite the introduction of the SIF, institutions are required to implement change, reform or quality processes within a zero-cost environment

This poses particular challenges for those schools, departments and individuals required to deliver these programmes.

### Equity of access remains a major issue

A 2004 HEA report<sup>3</sup> showed that even now, and despite the introduction of free fees, postal address and a father's occupation continue to be the major determinants of whether a young person goes on to third level education or not.

### Ireland still lags 20% behind comparable countries for investment in education

Ireland's education system represents 4.6% of GDP against an OECD average of 5.8%. Irish third level spending, at \$7,445 a year (per capita), is below the OECD average of \$7,951, but above the EU average of \$7,192.<sup>4</sup>

### Ireland is failing to harness valuable opportunities from international education

The value of the export of Ireland's educational services was €300m<sup>5</sup> in 2005, which is modest compared with Australia, where education is the country's fourth biggest export earner and was worth in the region of AU\$5.6bn (€3.3bn) to the economy in 2003–2004.<sup>6</sup>

In summary, our higher education system is working hard to equip Ireland to meet and exploit the challenges of a global economy and a changing society while rising to international standards. At the heart of higher education institutions are students. They are a diverse group, no longer willing to adapt or shape themselves into an immovable system, but ever more demanding of a system of higher education which is flexible, responsive and inclusive. This is a tall order for third and fourth level education which has historically valued tradition, been slow to change and often been inflexible in its structures. Yet, it is in everyone's interest to build a system of universities and institutes of technology that are the envy of the world. It is essential for our future success as a country operating in a global economy that we develop the very best of human capital.

<sup>3</sup> Higher Education Authority Report (2004) *Who went to College?*

<sup>4</sup> OECD Report (2006) *Education at a glance*

<sup>5</sup> The International Education Board Ireland, (2005)

<sup>6</sup> Department of Foreign Affairs and Trade, Australia September, (2005)

### Overview of survey methodology

This survey was carried out and funded by Prospectus to support and inform the advancement of third and fourth level education in Ireland. It is the first of its kind to be carried out for this sector. It is intended to provide a snapshot of the current position, views and mood within the sector. It will assist in shedding light on the current critical issues and opinions in Irish higher education, open up debate on these issues and provide a roadmap for moving the sector forward. The survey was circulated to over 600 individuals drawn mainly from government agencies, universities, institutes of technology, industry, the research community, private colleges and philanthropists in Ireland. The response rate was 29%. To support the findings we have also presented some representative quotes from respondents.

### What did the survey tell us?

We found a sector which is thoroughly engaged with the challenges it faces, working hard to negotiate significant change while recognising that there is substantial work to be done before Ireland achieves its ambition to be at the fore of global knowledge. On a very positive note, 87% of respondents felt that Irish higher education provides good value for money, while 76% felt that it is of a quality that compares well by international standards. However, we found respondents who identified themselves as researchers<sup>7</sup> to be most critical of the challenges facing Irish higher education, while respondents from government agencies tended to be most positive.

The following sections attempt to portray a picture of Irish higher education as painted by the survey responses and interpreted by Prospectus.

<sup>7</sup> Respondents who identified themselves as principal investigators or CE/Director of research institutes were defined as researchers for the purpose of analysing survey results.

#### Section 1

### Irish Higher Education Landscape

This section of the survey pointed to a higher education sector which has a number of questions yet to be answered on a range of issues from the effectiveness of national policies, strategy and structures to such topical issues as student fees, access to education and funding. Specifically the survey revealed:

#### While higher education policies are well progressed a national strategy is needed

57% of respondents agreed that current higher education policies support Ireland's ambitions to achieve a knowledge economy, yet 86% felt that the absence of a national strategy for higher education is hindering the advancement of the sector.

#### Third and fourth level education remains under-funded

This is one of the areas where there was relatively strong agreement between all the stakeholder groups. Overall, 84% of respondents felt that higher education is under-funded, but equally, 88% felt that institutions need more diverse sources of income.

#### The question of free fees remains a divided issue

57% agreed that abolishing free fees would be good for higher education. This was a key area where we saw a distinct gap in the views of different stakeholder groups. Institutes of technology were most in favour of retaining free fees while universities, researchers and government agencies were most in favour of abolishing them.

#### Access to education continues to be a challenge

Two-thirds of all respondents felt that third level education is not accessible to students from disadvantaged backgrounds. The same proportion also felt that the system is not meeting the needs of Ireland's new multi-cultural population.

#### Divided views on moving to centres of excellence

62% of respondents considered that Irish higher education might be better served by moving to national centres of excellence.

#### Section 2

### Irish Higher Education in an International Context

The priority attached to the development of higher education internationally appears to be low. That said, the majority of respondents recognised the relevance of the international dimension, as well as seeing the potential income from developing a strong international profile. Specifically the survey told us that:

#### Irish higher education is of a quality that is equal to or above other comparable countries

This was stated by 76% of respondents. 49% of researchers disagreed with this view.

#### International rankings are recognised as being relevant to the position and reputation of Irish institutions

64% agreed with this view, but only 47% believed them to be valid measures of quality. This raises an important conundrum for higher education institutions and strategies for developing their international positioning.

#### Ireland does not maximise its income potential from international sources

This was the view of 74% of survey respondents. Similarly, 87% of respondents felt that Government does not provide sufficient money to attract well-qualified overseas students.

#### International rankings should not influence higher education strategy and policy

53% of respondents were in agreement with this point. At the same time, 87% of respondents did not feel that the Government provides enough support to institutions in attracting well-qualified overseas students.

#### Irish higher education institutions are adopting strategies that will place Irish higher education as a world leader

50% of respondents agreed with this statement. At least 75% of each stakeholder group agreed with this statement, researchers were less supportive (50%).

### Section 3 Governance and Management

The effort, organisation pain and cost that institutions have gone through to implement governance, organisational and management reform have been the subject of much debate within the sector. Many institutions have struggled with these challenges and we believe that this is reflected in the survey responses.

#### **Governance structures present a greater challenge to the success of a university or institute of technology than their respective legislation**

This was the viewpoint of 57% of respondents. Institute of technology respondents were the most optimistic with 51% of them considering that the current governance structures support future institutional ambition.

#### **Decision-making processes in institutions tend not to be effective**

This was the viewpoint of 88% of respondents, yet 65% felt that the internal challenges of restructuring may not exceed the benefits that might accrue.

#### **The structural reform of higher education institutions is both necessary and beneficial**

84% of respondents felt strongly about this issue, but just 40% of respondents believed that staff are willing to embrace change.

#### **Strategic planning is reasonably well implemented at institutional level**

51% of respondents agreed with this statement, while only 50% agreed that it has been successfully cascaded to academic and administrative units within those institutions.

#### **Responsibilities such as strategic financial management must be devolved**

This statement was supported by 88% of respondents, who believe it is required to support the achievement of institutional objectives.

### Section 4 Teaching and Learning

Teaching and learning remains at the core of what higher education institutions do and is the major determinant of the annual budget of all institutions. The Irish higher education sector has achieved remarkable progress in producing graduates with the relevant skills to meet national needs, within an environment of limiting funding constraints. Specifically the survey revealed that:

#### **There is a consensus that teaching and learning is under-funded**

This was the viewpoint of 79% of respondents. Researchers were most emphatic in their views, 92% agreed that teaching and learning is under-funded.

#### **The Irish system of undergraduate education produces a high calibre of graduate**

According to 83% of respondents, these graduates have the relevant skills to meet national needs.

#### **It is not clear, however, how the learning experience should evolve for undergraduates**

49% of respondents felt that undergraduate students have enough exposure to research, while 47% felt that undergraduate students have enough exposure to industry.

#### **Irish higher education is not moving towards more modernised forms of teaching and learning (blended learning, reformed curricula, small class sizes etc.)**

This view was supported by 48% of respondents. Over 60% of respondents felt that the implementation of Bologna in Irish institutions is successful.

#### **Teaching and learning should not be based purely on economic need**

80% of respondents considered that programmes should be offered regardless of demand if they meet economic, social or cultural needs.

### Section 5 Fourth Level Ireland

This was a major area where respondents considered that further effort and investment is required. The general view appears to be 'a lot done, but much more to do'.

#### **Research carried out in Ireland is not yet of a level equal to the leading knowledge economies**

This was the view of 59% of respondents. Only half of the respondents felt that an adequate pipeline of researchers is being generated to support the knowledge economy, and 82% felt that the physical infrastructure needed to deliver national targets is not in place.

#### **The respective roles of universities and institutes of technology in relation to research are not clear**

This was the view of 86% of respondents. However, 76% of respondents felt that universities are the best places to host major research institutes such as the CSETs.

#### **Research does not receive adequate funding to achieve the levels of excellence that Ireland is aiming for**

This was the view of 82% of respondents.

#### **Collaboration can deliver better research**

60% of respondents agreed that collaboration has helped raise the quality of research in Ireland. 83% felt that the best collaboration occurs between individuals.

#### **Institutions are engaging in long-term strategies for the successful management of intellectual property (IP)**

This was the view of 56% of respondents, but respondents differed on what is a realistic time-frame for achieving a return on investment in IP.

#### **The Irish higher education system provides structured career paths for researchers**

Only 18% of respondents agreed with this statement. In particular, just 7% of researchers felt that good opportunities exist to develop career paths.

### Section 6 Development of Human Capital and Excellence

The Irish higher education system is only as good as the people in it. The development of human capital and excellence is therefore seen as integral to the future of Irish higher education. Specifically the survey revealed that:

#### **The culture within Irish universities and institutes of technology does not appear to be supportive of partnership, collaboration and inter-disciplinarity**

This was the view of 49% of respondents. Contrary to this, 65% of respondents agreed that the culture was positively disposed towards the progression and advancement of each institution's position.

#### **Good management is essential in guaranteeing the future position of Irish higher education institutions**

95% of respondents considered that the quality of management capability within institutions is critical in guaranteeing their future position.

#### **Operational and administrative management is also challenged**

Just 45% of respondents supported the view that the management capacity within institutions is appropriate to support their strategic challenge.

#### **Strategic human resource management capacity is not considered to be well resourced within our higher education institutions**

Only 26% of respondents felt that the development of a strategic approach to human resource management was adequately progressed. Researchers were the most critical of this area.

#### **Performance management systems within Irish higher education institutions recognise and reward excellence**

23% of respondents agreed with this statement. Only 30% of university and 7% of researcher respondents agreed.

## Learning from other countries

Many countries such as Singapore, UK, Denmark, Finland, New Zealand and Australia have developed strategies for higher education in recent years which provide direction and guidance for the leadership of the sector. Ireland now has the opportunity to learn from these countries, to build on our long history of scholarship and to rethink and possibly reshape how higher education can make an even greater contribution to our future development, one that makes us unique and distinctive internationally.

## Building on the 'Ireland' brand for higher education

Ireland's ability to fully exploit the opportunities in global education and research will only be constrained by our ambition to do so. The 'Ireland' brand is well established and provides a platform to showcase our talent, innovation and appetite to push out the boundaries in teaching, learning and leading-edge research.

The *Prospectus Survey of the Higher Education Sector 2007* provides some clear signposts on what we are doing well and what we need to improve. These will enable us to build on our strong academic tradition, and proactively develop and deliver a world-class research and learning environment that makes Ireland the destination of choice for students, academics and professional staff.

There is enormous commitment in the sector to the development of a vibrant system of education that will be relevant, excellent and accessible to all. The Prospectus view is that the existing appetite, ambition, energy and higher education leadership have the ability to develop the higher education system Ireland would like.

However there are a number of key questions to be addressed before we can move forward.

## 10 questions to be considered

- 1 What should be the unique positioning and the specific differentiating factors for Ireland in the global higher education services landscape?
- 2 What should be the relationship between higher education and other sectors of the economy?
- 3 What is the scope to reconfigure/rationalise/merge aspects of the current structure of the higher education system at institutional or Government level to ensure alignment with national objectives?
- 4 How can we develop and attract the appropriate leadership and talent at system and institutional levels to move higher education forward faster?
- 5 What is the appropriate balance between public and private funding for the higher education system?
- 6 What do higher education institutions have to do to ensure that they provide the appropriate experience for students of all ranges of abilities and backgrounds?
- 7 To what extent are there opportunities to create more centres of excellence at third and fourth level?
- 8 What should be the balance of investment in research between science and the humanities or does it matter?
- 9 How can research be translated efficiently and effectively for the benefit of society?
- 10 What changes are required in the strategic operating models of institutions to improve their ability to respond to emerging opportunities (e.g. a HR model based on performance rather than tenure)?

# Prospectus 10 key recommendations

The time to begin this journey is now and our recommendations are tabled to provide the key elements of the future roadmap.

- 1 Develop a more unified, cohesive and coherent policy framework for higher education.
- 2 Develop a long-term strategy for higher education that is explicit, ambitious, connected, clearly differentiates us, sets us apart internationally and contributes to our national economic, social and cultural goals.
- 3 Review the governance structures of the higher educational institutes to ensure they are appropriate to support the future strategic intent of the sector.
- 4 Adopt a radical and innovative approach to how third and fourth level institutions should be funded in the future, if they are to have the resources to enable them to compete in a more globalised higher educational market.
- 5 Establish a Higher Education Leadership and Management Institute to develop greater system capability and capacity to enable the sector to compete both nationally and internationally and manage the complexities of the reform process.
- 6 Invest significant resources in teaching and learning research to ensure that Ireland is at the leading edge in pedagogical approaches to meet increasingly diverse learner needs and to be able to compete in a more sophisticated and complex international student and workforce market.
- 7 Rethink how Ireland markets, sells and supports its higher educational services to capitalise on the opportunities in the global educational services market, based on a reputation for quality teaching, leading pedagogical approaches and outstanding pastoral care.
- 8 Clarify the relative roles of the universities and the institutes of technology in research to ensure that we optimise the investment being made in research, leverage inter-disciplinarity and collaboration, avoid duplication and encourage the development of critical mass in selected areas.
- 9 Develop a more co-ordinated, structured and strategic approach, both nationally and regionally, by the higher education institutions and enterprise to exploiting our evolving world-class research base and to the role that can be played by SMEs/MNCs in our transition to a higher valued-added knowledge economy.
- 10 Establish a 'National Think Tank' for higher education with national and international representation to provide advice and guidance to Government on higher education.

## ABOUT PROSPECTUS

Established in 1991, Prospectus is Ireland's leading independent strategy consultancy. We work with clients in third and fourth level education, healthcare and social services, philanthropy, not-for-profit and religious orders in building strong, successful organisations by developing sustainable strategies and putting them to work. Our services include strategy development and implementation, governance and organisation structures, sectoral reviews, change management, proposition development and the commercialisation of research.

Unique in Ireland, Prospectus has a dedicated Higher Education practice and advises clients on a varied range of policy, strategy and operational issues, making us ideally placed to carry out the survey given our active engagement with and understanding of the third and fourth level sectors in Ireland.

Specifically, we work with universities, institutes of technology, research institutes, Centres for Science, Engineering and Technology (CSETs), philanthropists and other stakeholder organisations in addressing various strategic challenges that are emerging within the sector.

Prospectus is an IMCA (Institute of Management Consultants and Advisors) registered company and a founding member of the Eurogroup Consulting Alliance, a pan-European alliance of independent management consulting firms, headquartered in Paris and represented in most countries in Europe.

## AUTHORS

David W Duffy, Deirdre O'Mara and Dr Orna Duggan were the authors of this publication and the full report *Lead or Follow? The global challenge for Irish higher education*.