



## EMBASSY OF IRELAND NAIROBI

### TERMS OF REFERENCE FOR MARKET STUDY TO IDENTIFY REGIONAL COMMERCIAL AND INSTITUTIONAL OPPORTUNITIES IN THE EDUCATION SECTOR

#### 1. Introduction

1.1 The Education Sector is one of the key sectors that Ireland seeks to promote internationally. This is in line with the International Education Strategy for Ireland, 2016-2020, which aims to support the attraction of talent from around the world to Irish Higher Education Institutes (HEIs) and engagements in world-class research and international collaborations/linkages.

1.2 Ireland's education sector is currently worth approximately EU 1.58bn per annum to the Irish economy and the Department of Education and Skills has set targets for the strategy period (2016-2020) to see this grow to EU 2.1bn per annum by 2020. Leveraging current world dynamics, Ireland is aiming to seize the opportunity to internationalise and promote its high quality third level education. In doing so, Ireland is focused on target markets such as East Africa that have registered phenomenal growth and expansion of higher education in the past two decades and opened opportunities for high school leavers to pursue degree programmes internationally.

1.3 In order to identify the specific opportunities and linkages available to Irish HEIs in the region, the Embassies in East Africa (Nairobi, Kampala, Dar es Salaam and Addis Ababa) are undertaking a regional market study covering the education sectors in **Kenya, Uganda, Tanzania and Ethiopia** in order to identify specific market opportunities. An initial market study was conducted of the Kenyan market in early 2017 which will require updating only in certain areas.

#### 2. Objectives

The objectives of this market study are to:

2.1 Present an overview of country specific and regional demand for undergraduate and postgraduate programmes in each of the countries reviewed, and how that demand is being met.

2.2 Recommend clear commercial opportunities and linkages available to Irish HEIs in the region of East Africa based on Ireland's comparative advantage in the education sector, and recommend market entry and development strategies.

2.3 Recommend education promotion strategies that Embassies and HEIs can undertake in the region.

#### 3. Scope of the study

The scope of the study will include the following:

3.1 Market and demand analysis of the sector in the individual markets and regionally, possibly including market analysis tools such as: Political Economic, Social, Technological, Legal and

Environment (PESTLE) analysis; Strength Weakness, Opportunities and Threats (SWOT) analysis of selected Irish HEIs; cost benefit analysis and/or other relevant market analysis tools.

- 3.2 Review of sector performance and student demographics in the last decade across the countries reviewed, including expenditure on education, number and growth of students, most popular courses, trends and forecasts, etc.
- 3.3 Brief review of education value chain, key subsectors and modes of course delivery covering TVET colleges, Universities, International recruitment and e-learning.
- 3.4 Analysis on barriers to studying in Ireland for students from the region, and any comparative analysis of other competitors in the market (e.g. student visa application processes).
- 3.5 Stakeholder/partner mapping and recommendations on key institutional linkages and engagements for Irish HEIs.
- 3.6 Identification of key disciplines to promote in the region.
- 3.7 Identification and recommendation of activities in the education sector that the respective Embassies in the region could pursue to raise awareness of Ireland as a study destination.

#### **4. Deliverables**

- 4.1 At the conception of the assignment the consultant will prepare and share with the Embassies an initial draft outline of the report to be produced clearly highlighting the major content areas that the report will cover for each country and as a regional synthesis.
- 4.2 Following the approval of the outline, the consultant shall work with the Embassy focal points in each country to proceed with the assignment and will submit the following to Embassy Nairobi:
  - A report which includes chapters for each of the countries studied (Kenya, Uganda, Tanzania and Ethiopia) and an initial synthesis chapter;
  - The country chapters should summarise the data collected, identify the key barriers to studying in Ireland for each context, and present recommendations for generation of opportunities which the Embassies can take forward.
  - The synthesis of country sector reviews should be developed in a way that it can be used as a standalone summary document on the regional situation and opportunities therein.
- 4.3 **Draft final report(s)** should be submitted to the assigned focal point addressing all aspects of the Study, providing clear and concise recommendations as per the Terms of Reference.
- 4.4 **Final report(s):** The final reports shall be submitted to Embassy Nairobi – as coordinating Embassy - 10 days after the receipt of comments to the draft final report. They will subsequently be shared with the other Embassies and with Enterprise Ireland.

#### **5. Expected outcomes**

- A clear understanding of the third level education market and demand in the region.
- Opportunities identified that would assist Irish Higher Education Institutions to market their courses in the region and recruit East African students.
- A clear understanding of the barriers preventing East African students from travelling to Ireland to pursue third-level education.
- Recommendations for activities which the Irish Embassies in the region could pursue in order to raise awareness of Ireland as a study destination and to facilitate an increase in the number of students travelling from East Africa to study in Ireland.

## 6. Duration of the study

It is expected that the assignment will commence by early April 2018 and will be conducted over an eight week period; to be completed by end-May 2018.

## 7. Qualification of consultant

7.1 The contract is open to both firms and individuals who can demonstrate competencies in delivering the assignment.

7.2 At least 10 years' experience in commercial market studies is required.

7.3 Previous experience in the Education Sector is desirable.

7.4 Experience of working in the East Africa region is required.

## 8. Awarding of the contract

The award criteria will be as follows:

Criteria	Weighting (%)
Proven credibility and experience of assigned staff	30
Cost	30
Work plan and methodology	25
Regional Experience	15

***The maximum budget available for this consultancy is €40,000. Bids submitted above this ceiling will not be considered.***

## 9. Obligations of the consultant(s)

9.1 The consultant shall need to present a draft work plan and methodology in order to be considered for awarding of the contract.

9.2 The consultant shall perform all necessary activities that may encompass planning, analyses, economic, and financial analyses, project costing and related tasks as described herein with due care and diligence to attain the objectives of the study.

9.3 In the conduct of his/her work, the consultant shall regularly communicate with the Embassies and Enterprise Ireland and other executing agencies as the Report may require and as agreed. This will include Ministries responsible for Education and other Government Departments and Agencies responsible for education, high schools, universities, education agents and any other relevant parties.

9.4 The consultant shall be responsible for collecting primary and secondary data in the field and documents from relevant sources as appropriate.

## 10. Services and facilities to be provided by the client

The overall responsibility for administration and coordination of the study rests with the Embassy of Ireland Nairobi. The consultant shall report to and be overseen by the Commercial Attaché, under the supervision of the Deputy Head of Mission. Embassy Nairobi will coordinate communications with the other Embassies in Uganda, Ethiopia and Tanzania, and with Enterprise Ireland.

## **11. Submission Deadline**

All proposal should be submitted to [kenneth.gitonga@dfa.ie](mailto:kenneth.gitonga@dfa.ie) by **COB 31st March 2018**