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IGEES
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Irish Government Economic and Evaluation Service

Projections of demand for Higher Education 2025-2045

Prepared by the Data & Evaluation Unit
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1 Introduction and overview

This report provides projections of demand for full-time enrolments in state-supported third-level education institutions for the period 2025 to 2045. Its primary aim is to estimate future enrolment trends by taking into account recent social, demographic, and environmental factors.

The previous set of projections was produced in 2022, when there was still considerable uncertainty about the effects of two significant shocks which followed closely on one another: Brexit and the COVID pandemic. It is hoped that the more recent data underpinning this model represents a more stable baseline from which to project enrolments. However, changes in the social and economic landscape, even if less marked than those experienced within the last five years, can lead to shifts in students' preferences and the projections in this report should be considered in this light. Moreover, it is important to emphasise that projections are *not* predictions: They show what *would* happen, as long as clearly defined set of assumptions hold, but not what *will* happen

1.1 Key findings

- **Undergraduate enrolments:** The number of full-time undergraduate enrolments, 177,360 in 2024/25, is projected to peak at 204,400 in 2033/34 and then decline to 186,712 by 2045. Growth is primarily driven by expected increases in the numbers of Irish school-leavers, which in turn reflect past fertility rates and expected future migration patterns.
- **Postgraduate enrolments:** The projected number of full-time postgraduate enrolments is heavily dependent on growth levels for Non-EU students. Enrolment numbers in this cohort of students have grown markedly over the past 15 years. Based on the three scenarios detailed in Section 2.3.4, postgraduate enrolments are projected to rise from 34,180 in 2024/2025 to between 39,968 (short-term growth scenario) and 46,478 (sustained growth scenario) by the mid-2030s. This peak is expected to be followed by a slight decline toward 2045. Some growth in Irish post-graduate enrolment numbers is also projected as part of this overall number.
- **Total enrolments:** It is projected that the total number of full-time enrolments, which was 211,540 in 2024/25, will peak between 244,347 and 250,857 in 2033/34. The variance in the peak enrolment number reflects different growth scenarios for Non-EU postgraduate enrolments.

1.2 Model overview

The model consists of two components:

- The first projects undergraduate enrolments for Irish[1] and international students (EU, Britain, Northern Ireland, and Non-EU) utilising a Cohort Survival model, with a more complex implementation for the Irish cohorts;
- The second projects postgraduate enrolments for all the above cohorts by examining the most recent trends in enrolments

The outputs of these components for each future year are then summed, giving a projection of total enrolments.

1.2.1 Undergraduate enrolments

Undergraduate enrolments for all cohorts are projected according to an inflow-outflow methodology at the system level. The number of new entrants – those who have never enrolled in a higher education institute in Ireland before – is projected first. Total undergraduate enrolments are then calculated iteratively by adding the new entrants for each year to a fixed proportion of the previous year's total. This proportion is called the Rate of Undergraduate Turnover (ROUT). The ROUT primarily captures movements within the existing cohort of students—including progression to the next stage of a course, transfer to a new course, non-progression (dropout), and graduation. This is shown in the equation below, where the index y represents the year.

$$enrolments_y = new\ entrants_y + rout \times enrolments_{y-1} \tag{1}$$

However, it is important to note that some students who are not classified as new entrants may still be both entering the first year of a course, and will not have been present in the previous year. For example, consider a student who already holds a lower qualification and is now beginning an honours degree. If this student completed their previous course in the preceding academic year, they will appear in the existing cohort; otherwise, they will not. The ROUT therefore reflects movements both among students already within the system and those re-entering it after an absence, introducing greater variability than if it accounted only for the former.

[1] Throughout the document 'Irish' refers to Irish domiciled. A student's domicile is the country of permanent address prior to entry to their programme of study. If the student is residing in Ireland for 3 of the 5 years previous to registering for their current course, then their domicile is considered to be Ireland.

1.2.2 Postgraduate enrolments

Irish postgraduate enrolments are calculated as a fixed percentage of total enrolments (undergraduate and postgraduate), whereas postgraduate enrolments for each of the international cohorts are projected by analysing existing trends and continuing them into the future. For Non-EU students, we consider three different scenarios of growth, given the level of enrolment growth that has been seen in this cohort and reflecting a level of uncertainty around the trajectory of this future growth.

1.3 Note on data and terminology

The projections in this paper cover full-time enrolments at the institutions listed in Appendix A. References to existing or historical enrolments relate to full-time students at these institutions. Projections are given in academic years, which span two calendar years; for simplicity, and unless otherwise stated, academic years are identified by their first calendar year—for example, "2020" refers to 2020/21.

The principal data sources are the Department of Education & Youth and the Higher Education Authority. The former provides projections of school-leavers in Irish secondary schools and transfer rates from second to third level, while the latter supplies enrolment data for higher education institutions, based on a census conducted each March of the academic year.

1.3.1 Ukrainian students

The displacement of Ukrainians from their home to other European countries, including Ireland, since 2022, has caused an increase in the number of Ukrainian students studying full time in Ireland. As of 2024/2025, an estimated 1,800 Ukrainian nationals were enrolled in higher education institutions in Ireland.

For the purpose of projecting future enrolments, no explicit projections for Ukrainian students have been developed. Rather, they have been captured in the Department of Education and Youth's projections of school leavers, and also in the Central Statistics Office population projections, both of which are utilized in the model to project Irish undergraduate new entrants. The number of Ukrainian student at postgraduate level is negligible and no special provision is made for them in the projections.

The remainder of this report provides an overview of the model, describes the enrolment cohorts considered—undergraduate, postgraduate, domestic, and international students—and sets out the methodology and data underpinning the resulting projections for each cohort.

2 Projected enrolments by population cohort —Methodology

This section builds on the overview above by providing more detail on how projections for each cohort of students, at both undergraduate and postgraduate level, are compiled. It is divided into i) Irish undergraduate, ii) international undergraduate and iii) postgraduate enrolments.

2.1 Irish undergraduates

Irish new-entrants comprise two groups of student:

- New-entrants who have sat the Leaving Certificate within the past five years, and
- Mature new entrants

Projections for each of these are discussed sections 2.1.1 and 2.1.2, respectively. Section 2.1.3 discusses total enrolment numbers for Irish undergraduate students.

2.1.1 New entrants: Transfers from second to third level

To accurately determine the rate of student progression from second level to a given third-level academic year, post-primary students who completed school in each of the five preceding years are matched with new entrants to third-level institutions in that same academic year. Whilst many students will complete their Leaving Certificate and transfer straight to third-level, some will take a year or more out: By including the most recent five cohorts of school leavers, the data matching exercise thus captures practically all second-level students who enter third level for the first time before the age of 23 (at which point they are mature students).

The transfer rates for the most recent seven academic years are shown in Table 1 below. As a guide to interpreting the data, the leftmost column indicates that among those entering third level in 2023, 49.8% had completed secondary school in the same year, 10% had finished in 2022, and 2.7% in 2021, and so on.

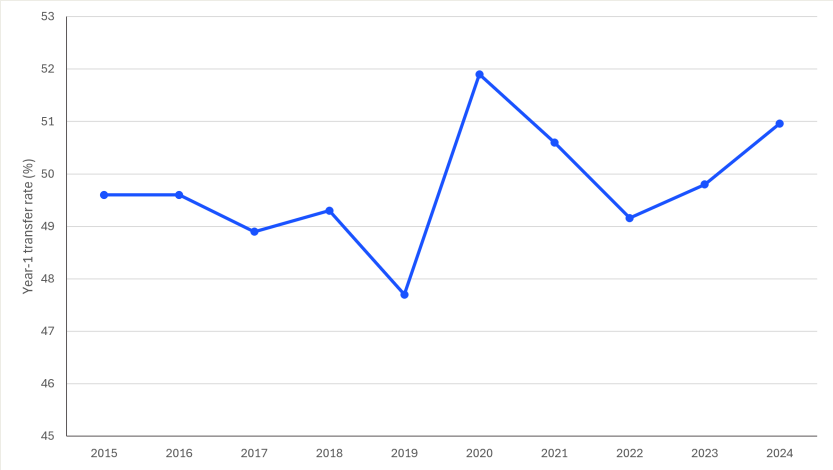
Table 1: Transfer rates to third level, by year of leaving second-level and year of entry to third level

Year of leaving school	2019	2020	2021	2022	2023	2024
2023					49.8	9.8
2022				49.2	10.0	2.6
2021			50.6	9.8	2.7	1.3
2020		51.9	9.6	2.5	1.1	0.7
2019	47.7	9.9	2.2	1.0	0.5	
2018	10.1	2.6	1.0	0.4		
2017	2.6	1.1	0.6			
2016	1.0	0.6				
2015	0.7					

Source: Department of Education & Youth

Figure 1 indicates that the year-1 transfer rate was broadly stable—fluctuating within a percentage point and exhibiting no clear trend—until 2019, when it fell by almost two points to 47.7%. The onset of Covid led to a rise to 51.9%, with the rate remaining elevated in 2021 (50.6%) before reverting to pre-Covid levels in 2022. Subsequent increases in 2023 and 2024 brought the rate to approximately 51.0% in 2024. This may suggest that the transfer rate is settling at a new, higher, level, post-Covid.

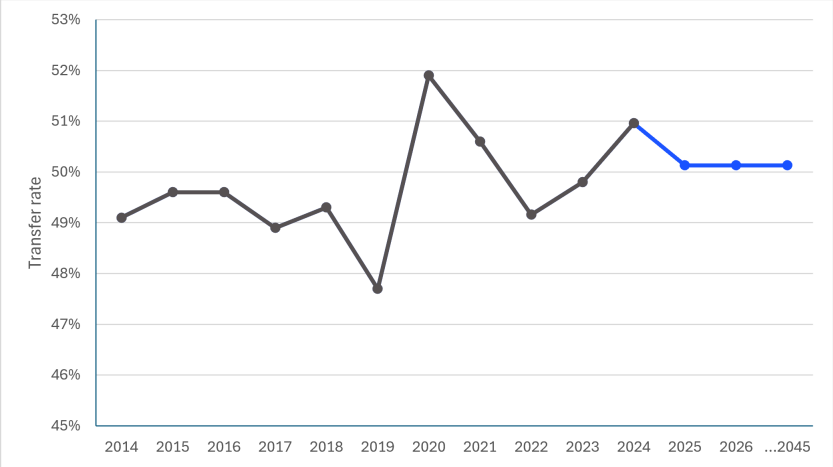
Figure 1: Year-1 transfer rate to third level, by year



Source: Department of Education & Youth

In the projection model, the year 1 transfer rate is held constant at the average of the four most recent actual transfer rates, or 50.1%, as in Figure 2 below.

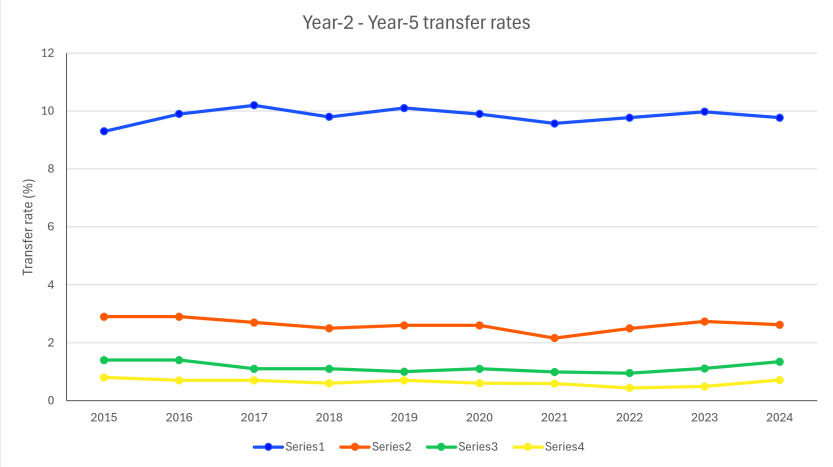
Figure 2: Projection of the year-1 transfer rate



Source: Department of Education & Youth and Authors' own calculations

New entrants who transfer from second to third level are projected by applying a transfer rate to the projected number of secondary school leavers-these projections are supplied by the Department of Education and Youth-in each of the five previous academic years. The year-2 to year-5 transfer rates are very stable over time, as seen in Figure 3, and they are held constant at their 2020-2024 five-year averages.

Figure 3: Year-2 – Year-5 transfer rates to third level, by year



Source: Department of Education & Youth

2.1.2 New entrants: Mature students

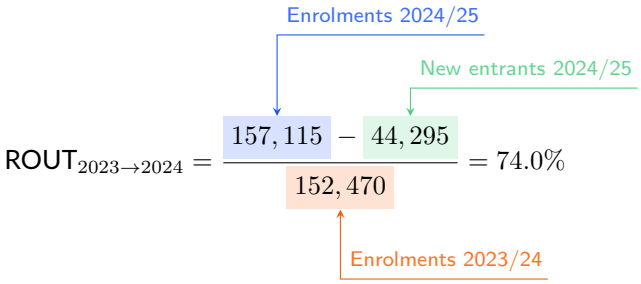
Mature entrants are defined as individuals who enrol in an undergraduate course for the first time aged 23 or older[2] These applicants are eligible to be assessed for financial supports independently of their parents. Usually, over half of mature new-entrants will be aged thirty or under.

In the model, the projected number of mature students for each academic year is derived by assuming that the age-specific enrolment rates observed in 2023/24—calculated using CSO population estimates—remain constant. These rates are then applied to the corresponding sub-populations within the CSO's population projections for each future academic year.

2.1.3 Total Irish undergraduates

As outlined earlier, the projected total number of Irish undergraduate enrolments for a given academic year is calculated iteratively by adding the projected number of new entrants for that year with a proportion of the estimated total enrolled in the previous year. This proportion is the Rate of Undergraduate Turnover (ROUT). To aid understanding, the calculation of the actual turnover between 2023/24 and 2024/25 is annotated below:

Figure 4: Calculation of the ROUT between 2023/24 and 2024/25



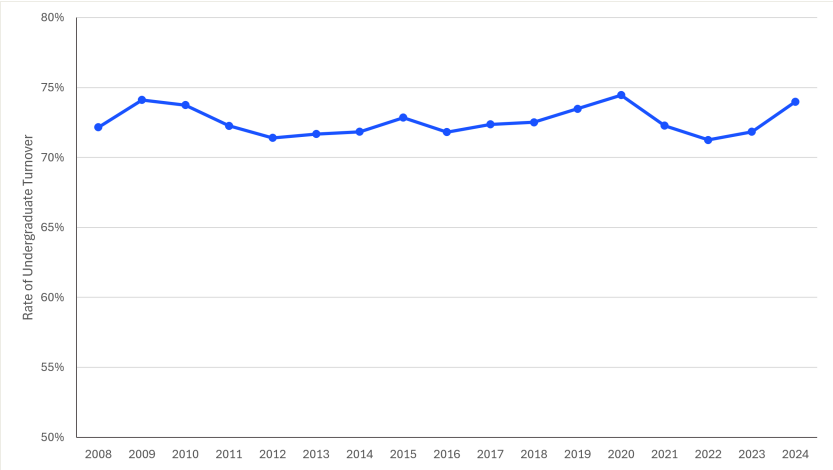
(2)

Source: Higher Education Authority, Authors' own calculations

Figure 5 shows a time series of ROUT values for Irish undergraduate enrolments: The ROUT reached a peak of 75.4% in 2020, most likely explained by a combination of risk-averse behaviour among existing students who chose to continue in their course, where they would otherwise have dropped out, and older adults choosing to return to education or attend for the first time. In the model, the ROUT is held constant at its two-year average of 72.9%

[2] They must be at least 23 years old in the January of the calendar year they start their course. As the HEA student census is taken in the March of each academic year, we treat as mature students those who are 24 years or older at that time.

Figure 5: Rate of Undergraduate Turnover, by year



Source: Department of Education; Authors' own calculations

2.2 International undergraduates

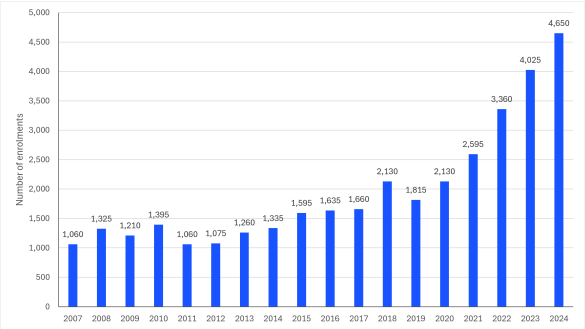
International undergraduate enrolments consist of three different cohorts of students: EU, Britain, Northern Ireland and Non-EU. This section discusses the approach taken in the model to each of these cohorts.

2.2.1 EU enrolments

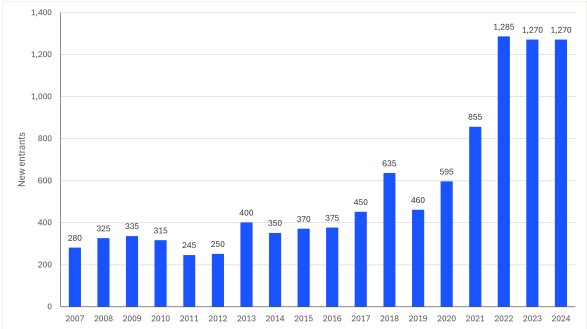
EU undergraduate enrolments have more than doubled since 2019, with consistent growth each year since then. Enrolments increased over four-fold in the seventeen years since 2007. This is shown in Figure 6a.

The number of EU undergraduates entering the system underwent a concentrated level-shift between 2019 and 2022, when it grew from 460 to 1,285 (see Figure 6b), and it has since remained steady at this new level. It is assumed , given the stability in new entrant numbers since 2019, that the number of new entrants will remain steady into the future. This implies that enrolments will grow until an equilibrium is reached, whereby the number of new entrants is equal to the number of students lost in the turnover of the previous years enrolments.

Figure 6: EU undergraduate enrolments



(a) EU full-time undergraduate enrolments, by year

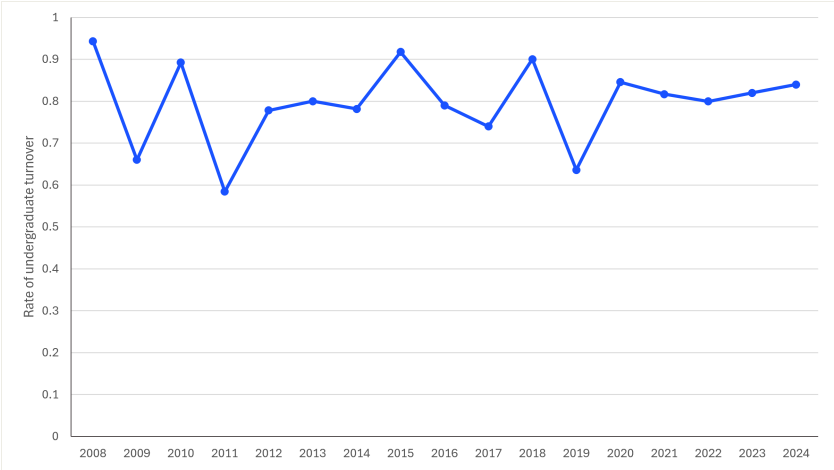


(b) EU full-time undergraduate new-entrants, by year

Source: Higher Education Authority

A time series of the ROUT since 2008 is shown in Figure 7. This shows a no clear pattern between 2008 and 2020, which may reflect the impact different shocks that occurred during those years; the economic recession, COVID and Brexit.

Figure 7: Rate of turnover of EU undergraduate enrolments, by year



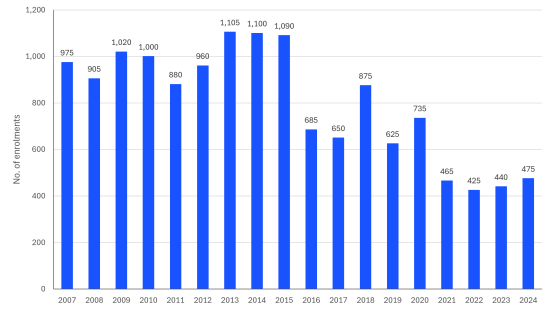
Source: Higher Education Authority; Authors' own calculations

In the model, the number of projected new entrants is kept constant at the 2022-2024 average of 1,275, and the ROUT is also fixed at its five year average of 82.4%.

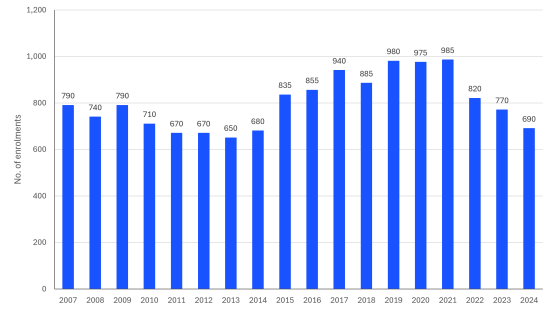
2.2.2 Britain and Northern Ireland enrolments

The number of undergraduate students from Britain —475 in 2024 —is now less than half what it was in the period immediately before the UK vote to leave the European Union in 2016 (Figure 8a). The number from Northern Ireland —690 in 2024 —is now at the same level as 2014, having increased towards 1,000 between 2014 and 2021 (Figure 8b)

Figure 8: Britain and Northern Ireland undergraduate enrolments, by year



(a) Britain enrolments

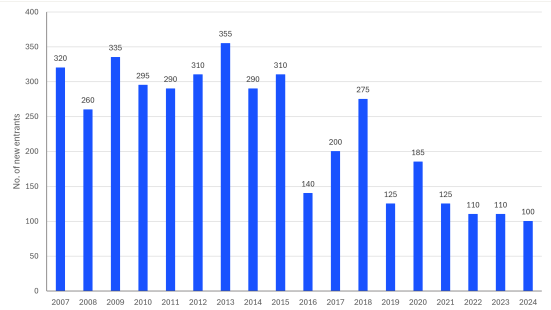


(b) Northern Ireland enrolments

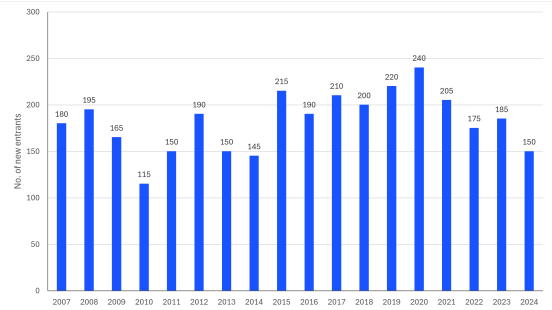
Source: Higher Education Authority

The number of new entrants from Britain (Figure 9a) was 100 in 2024, the lowest in the period since 2007. The number of new entrants from Northern Ireland (Figure 9b) was 150 in 2024, representing a return to the 2014 level, similar to enrolments.

Figure 9: Britain and Northern Ireland undergraduate new entrants, by year



(a) Britain new entrants

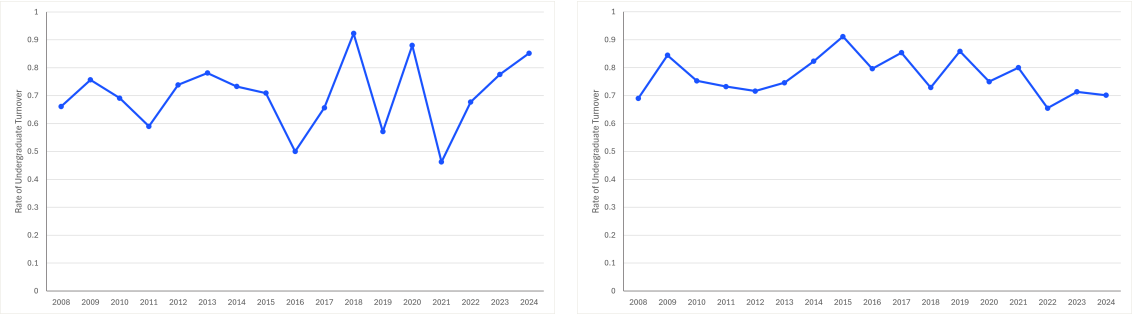


(b) Northern Ireland new entrants

Source: Higher Education Authority

A time series of the ROUT for both domiciles is shown in Figures 10a and 10b: In both cases, the ROUT exhibits a high degree of fluctuation, but without any consistent trend.

Figure 10: Britain and Northern Ireland Rate of Undergraduate Turnover (ROUT), by year



(a) Britain ROUT

(b) Northern Ireland ROUT

Source: Higher Education Authority, Authors' own calculations

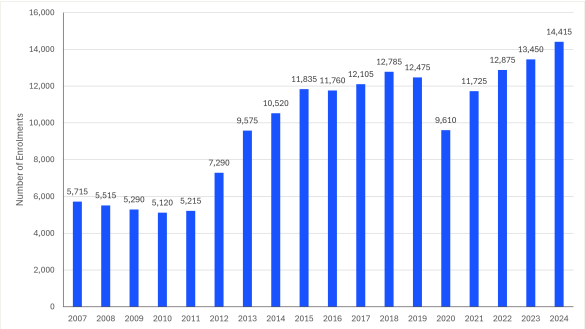
To project undergraduate enrolments, the numbers of new entrants for both Britain and Northern Ireland are held constant at their five year averages of 126 and 191, respectively, and the ROUTs are fixed at their ten-year averages which are of 70.0% and 77.7%, respectively.

2.2.3 Non-EU enrolments

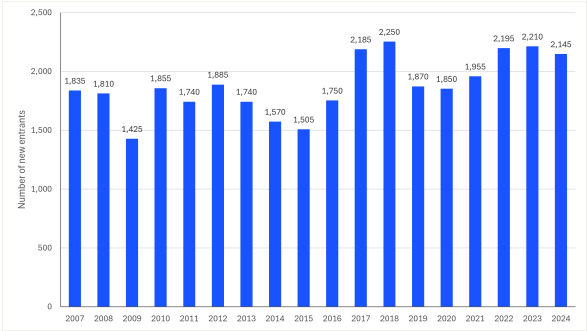
Enrolments at undergraduate level for Non-EU students have grown significantly over the past two decades, with enrolment of 14,415 in 2024/2025 approximately 2.5 times the number enrolled in 2007 (5,715). This is shown in Figure 11a.

The number of new entrants, shown in Figure 11b, underwent a relatively slight level-shift in 2017, going above 2,000 for the first time in the period since 2007. Ignoring the disruption to enrolment numbers during the 2019-2021 period, there has been relative stability in enrolment numbers for new entrants since 2017

Figure 11: Non-EU undergraduate enrolments



(a) Non-EU full-time undergraduate enrolments, by year

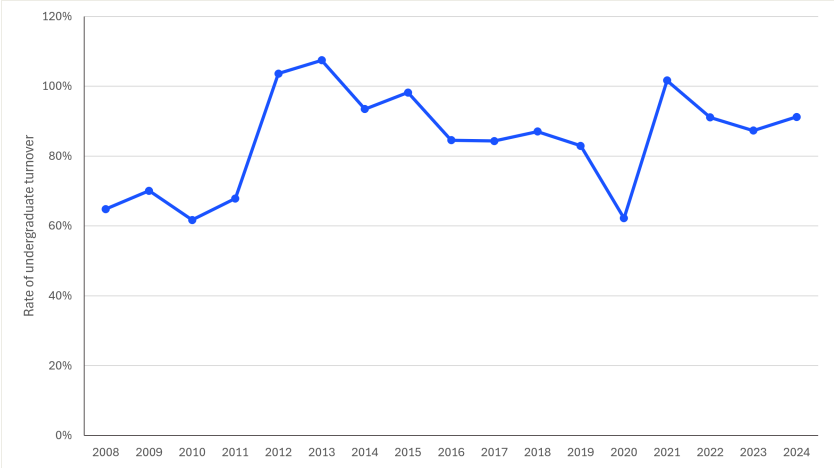


(b) Non-EU full-time undergraduate new-entrants, by year

Source: Higher Education Authority

A time-series of ROUT values is shown in Figure 12. Similar to the new entrants data, the ROUT has demonstrated stability since 2015, once the 2019-2020 data is excluded.

Figure 12: Rate of turnover of Non-EU undergraduate enrolments, by year



Source: Higher Education Authority; Authors' own calculations

In the model, the number of Non-EU undergraduate new-entrants is held constant at its average over the five years 2017, 2018, 2022, 2023, 2024 (2,197). The ROUT is likewise fixed at its average over those years (88.1%).

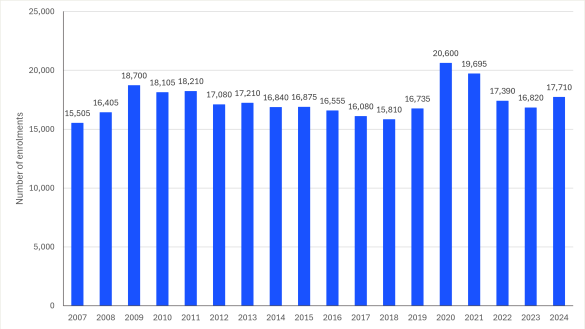
2.3 Postgraduate enrolments

2.3.1 Irish enrolments

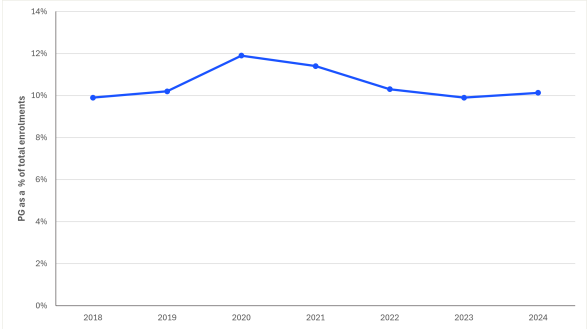
The number of Irish postgraduate students, shown in 13a increased by over 2,000 students between 2008 and 2009, from 16405 to 18,700; it remained above 18,000 for the next three years and then declined gradually so that by 2018 it was again under 16,000, as in 2007. It increased to over 20,000, for the first time in this period, during the pandemic and, as of 2024, it was still elevated relative to the pre-pandemic years, at 17,710. 54% of these (9,565) were enrolled in a Taught masters programme and 27% (4,740) in PhD programme.

Figure 13b illustrates that Irish postgraduate enrolments consistently account for approximately 10% of total Irish enrolments, with a transitory increase to 12% observed during the pandemic. In the model, it is assumed that there will be no change to this figure in the future, and therefore, the Irish postgraduate enrolment projections are estimated from the overall projected undergraduate enrolments.. Specifically, if postgraduate enrolments are a fixed 10% of total enrolments, then they are a fixed c.11% ($\frac{0.1}{0.9}$) of undergraduate enrolments.

Figure 13: Irish postgraduate enrolments



(a) Irish full-time postgraduate enrolments, by year



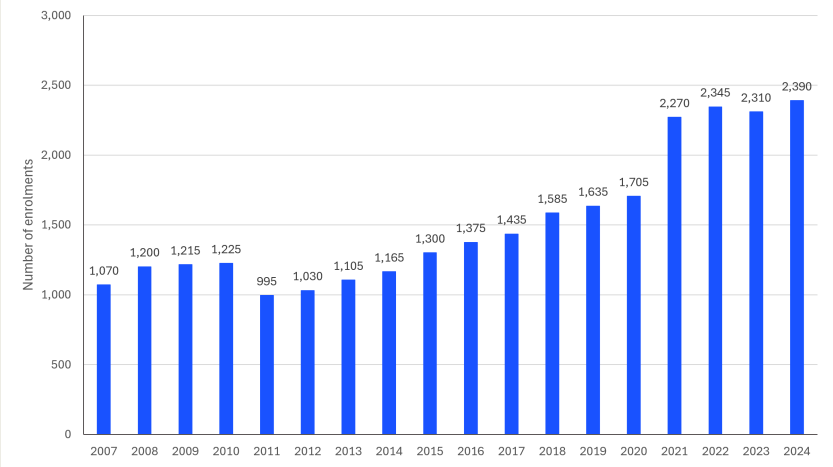
(b) Irish full-time postgraduate enrolments as a percentage of total Irish full-time enrolments, by year

Source: Higher Education Authority, Authors' own calculations

2.3.2 EU enrolments

The number of EU postgraduate enrolments, as illustrated in Figure 14, experienced a significant surge of 33.2% between 2020 and 2021. Since then, it has remained broadly stable. In 2024, around 59% (1,400) of these students were enrolled in a Taught Masters programme, and 37% (890) in a PhD programme. In the model, EU postgraduate enrolments are kept constant at the average of the past four years, or 2,329

Figure 14: EU full-time postgraduate enrolments, by year

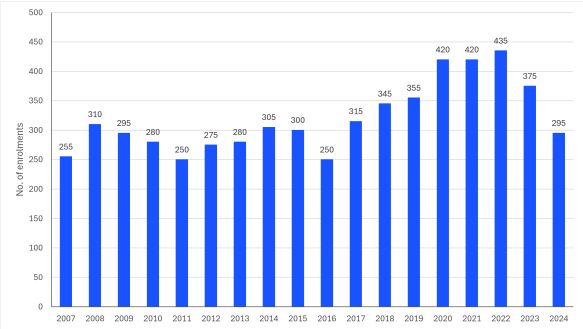


Source: Higher Education Authority

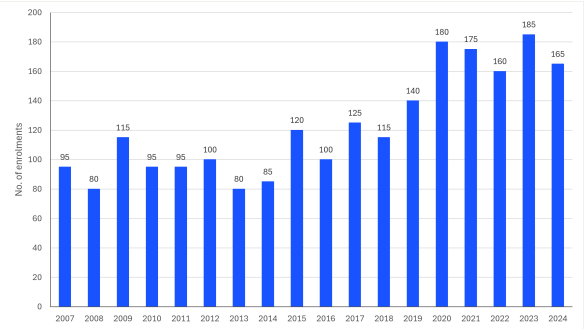
2.3.3 Britain and Northern Ireland enrolments

Enrolments from both Britain and Northern Ireland, have been higher, on average, since 2020, than in the years prior to this. The number of enrolments from Britain increased to over 430 in 2022, but has fallen back in the most recent two years of enrolments, while, for Northern Irish students, the number of enrolments has stayed above 160 since 2020 (Figures 15a and 15b). In 2024, 56% (165) of students from Britain were enrolled in a PhD students, while 39% were enrolled in a Taught Masters programme. The corresponding figures for Northern Irish students were 39% and 42%, respectively. In the model, Britain and Northern Ireland projected enrolments are kept constant at their five year (2019-2024) averages, with projected annual enrolments of 389 and 173 for Britain and Northern Ireland.

Figure 15: Britain and Northern Ireland postgraduate enrolments



(a) Britain full-time postgraduate enrolments, by year



(b) Northern Ireland full-time postgraduate enrolments, by year

Source: Higher Education Authority

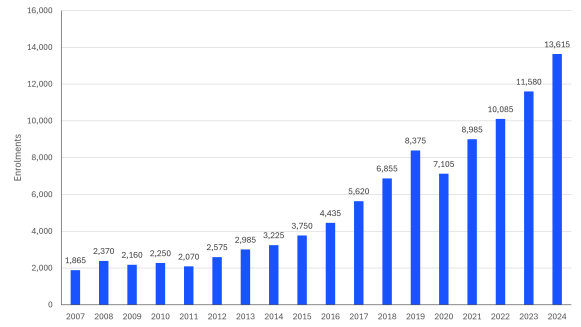
2.3.4 Non-EU enrolments

The number of Non-EU post-graduate enrolments has grown consistently over the past two decades, and particularly since 2011. The number of Non-EU postgraduate students enrolled in 2024/2025 was 13,615, which is over seven times the number enrolled in 2007 (1,865). This is outlined in Figure 16a. Almost 73% of these (9,915) were taught masters students, while a further 23% (3,160) were PhD students. Thus, this cohort is thus more heavily skewed towards taught postgraduate study than any of the others.

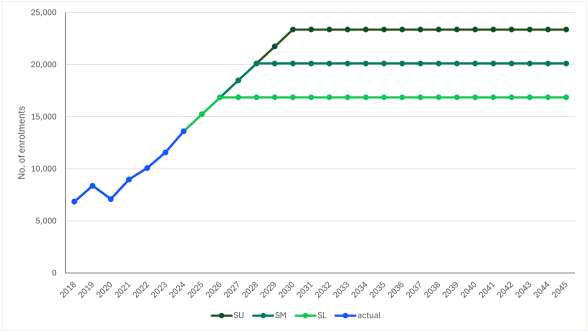
Attracting international students is a strategic priority for many institutions, serving as an important source of funding. While the majority of recent growth has been driven by traditional universities, technological universities are expected to expand and diversify their international student cohorts in the coming years, offering further opportunities for growth. However, the pace of recent expansion may not be maintained over the long term. External and institutional factors, such as institutional capacity, policy decisions and changes in the international environment may all impact on enrolment numbers for this cohort. Given the rate of growth of this cohort in recent decades, and the number of factors that could impact on its future trajectory, it was felt that, unlike other population cohorts, a number of future enrolment scenarios should be developed. Three scenarios were developed. These are:

- S_L: The linear growth that has been seen between 2020 and 2024 in continued out two years to 2026, at which point the number of enrolments would be c.17,000; it is kept constant thereafter.
- S_M: The growth is continued out a further three years to 2028, at which point the number of enrolments would be c.20,000.
- S_U: The growth is continued for a total of ten years out to 2030, at which point the number of enrolments would is c.23 ,000. The projections under these scenarios are shown in Figure 16b

Figure 16: Non-EU postgraduate enrolments



(a) Non-EU full-time postgraduate enrolments, by year



(b) Projections of Non-EU full-time postgraduate enrolments, by scenario and year

Source: Higher Education Authority, Authors' own calculations

2.4 Summary of assumptions

This section brings together in summary form the assumptions applied to each the different population cohorts, and upon which the projected enrolment numbers have been calculated

2.4.1 Undergraduate assumptions

Table 2: Summary of model assumptions for undergraduate cohorts

Domicile	New-entrants	ROUT
Irish	Transfers from second level: Transfer rates applied to school-leaver projections. Mature new-entrants: Age-specific rates in 2024 applied to CSO population projections	Fixed at the two-year average
EU	Fixed at the three-year average	Fixed at the five-year average
United Kingdom Great Britain Northern Ireland	Fixed at the five-year average	Fixed at the ten-year average
Non-EU	Fixed at the 2017, 2018, 2022, 2023, 2024 average	

Source: Authors' own calculations

2.4.2 Postgraduate assumptions

Table 3: Summary of model assumptions for postgraduate cohorts

Domicile	Enrolments
Irish	Calculated as c.10% of total enrolments
EU	Fixed at the four-year average
United Kingdom Great Britain Northern Ireland	Fixed at the five-year average
Non-EU	S_L: Current linear growth is continued for four years, thereafter held constant. S_M: Current linear growth is continued for seven years, thereafter held constant. S_U: Linear growth is continued for ten years, thereafter held constant.

Source: Authors' own calculations

3 Results

The three tables in this section show actual enrolments in 2024/25[3] and, for the following years, projections compiled according to the methodology described in Section 2:

- Table 4 displays projections of undergraduate enrolments by domicile;
- Table 5 displays projections of postgraduate enrolments by domicile;
- Table 6 displays projections oftotal enrolments by domicile.

Table 4: Projections of undergraduate full-time enrolments, by domicile, 2025/26 - 2045/46

Year	Irish total	EU	UK		Non-EU	International total	Overall total
			GB	NI			
2024/25 (actual)	**157,115**	**4,650**	**475**	**690**	**14,415**	**20,225**	**177,360**
2025/26	160,078	5,108	459	727	14,911	21,205	181,284
2026/27	165,079	5,486	448	756	15,348	22,038	187,118
2027/28	170,814	5,798	440	778	15,734	22,750	193,565
2028/29	174,916	6,055	434	796	16,075	23,359	198,275
2029/30	177,847	6,266	430	809	16,375	23,881	201,728
2030/31	178,893	6,441	428	820	16,640	24,328	203,221
2031/32	179,091	6,585	426	828	16,873	24,711	203,802
2032/33	179,270	6,703	424	834	17,079	25,041	204,311
2033/34	179,076	6,801	423	839	17,261	25,324	204,400
2034/35	178,341	6,882	423	843	17,421	25,568	203,909
2035/36	177,669	6,948	422	846	17,562	25,779	203,447
2036/37	176,659	7,003	422	848	17,687	25,960	202,619
2037/38	175,117	7,048	422	850	17,797	26,117	201,233
2038/39	173,279	7,086	422	851	17,894	26,252	199,531
2039/40	171,794	7,116	422	852	17,979	26,369	198,164
2040/41	170,373	7,142	421	853	18,055	26,471	196,844
2041/42	168,538	7,162	421	854	18,121	26,559	195,097
2042/43	166,235	7,180	421	854	18,180	26,635	192,870
2043/44	163,918	7,194	421	855	18,232	26,701	190,619
2044/45	161,801	7,205	421	855	18,277	26,759	188,560
2045/46	159,903	7,215	421	855	18,317	26,809	186,712

Source: Authors' own calculations

[3]Note that the actual results are rounded to the nearest 5 students. The actual totals also contain a small number of students of unknown domicile. Therefore, a sum over domiciles may not equal the total.

Table 5: Projections of postgraduate full-time enrolments, by domicile, 2025/26 - 2045/46

Year	Irish total	EU	UK		Non-EU			International total			Overall total		
			GB	NI	S_L	S_M	S_U	S_L	S_M	S_U	S_L	S_M	S_U
2024/25 (actual)	**17,710**	**2,390**	**295**	**165**		**13,615**			**16,465**			**34,180**	
2025/26	18,044	2,329	389	173	15,243	15,243	15,243	18,133	18,133	18,133	36,177	36,177	36,177
2026/27	18,608	2,329	389	173	16,870	16,870	16,870	19,761	19,761	19,761	38,368	38,368	38,368
2027/28	19,254	2,329	389	173	16,870	18,498	18,498	19,761	21,388	21,388	39,015	40,642	40,642
2028/29	19,717	2,329	389	173	16,870	20,125	20,125	19,761	23,016	23,016	39,477	42,732	42,732
2029/30	20,047	2,329	389	173	16,870	20,125	21,753	19,761	23,016	24,643	39,808	43,063	44,690
2030/31	20,165	2,329	389	173	16,870	20,125	23,380	19,761	23,016	26,271	39,926	43,181	46,436
2031/32	20,187	2,329	389	173	16,870	20,125	23,380	19,761	23,016	26,271	39,948	43,203	46,458
2032/33	20,207	2,329	389	173	16,870	20,125	23,380	19,761	23,016	26,271	39,968	43,223	46,478
2033/34	20,185	2,329	389	173	16,870	20,125	23,380	19,761	23,016	26,271	39,946	43,201	46,456
2034/35	20,103	2,329	389	173	16,870	20,125	23,380	19,761	23,016	26,271	39,863	43,118	46,373
2035/36	20,027	2,329	389	173	16,870	20,125	23,380	19,761	23,016	26,271	39,788	43,043	46,298
2036/37	19,913	2,329	389	173	16,870	20,125	23,380	19,761	23,016	26,271	39,674	42,929	46,184
2037/38	19,739	2,329	389	173	16,870	20,125	23,380	19,761	23,016	26,271	39,500	42,755	46,010
2038/39	19,532	2,329	389	173	16,870	20,125	23,380	19,761	23,016	26,271	39,293	42,548	45,803
2039/40	19,365	2,329	389	173	16,870	20,125	23,380	19,761	23,016	26,271	39,125	42,380	45,635
2040/41	19,204	2,329	389	173	16,870	20,125	23,380	19,761	23,016	26,271	38,965	42,220	45,475
2041/42	18,998	2,329	389	173	16,870	20,125	23,380	19,761	23,016	26,271	38,758	42,013	45,268
2042/43	18,738	2,329	389	173	16,870	20,125	23,380	19,761	23,016	26,271	38,499	41,754	45,009
2043/44	18,477	2,329	389	173	16,870	20,125	23,380	19,761	23,016	26,271	38,238	41,493	44,748
2044/45	18,238	2,329	389	173	16,870	20,125	23,380	19,761	23,016	26,271	37,999	41,254	44,509
2045/46	18,024	2,329	389	173	16,870	20,125	23,380	19,761	23,016	26,271	37,785	41,040	44,295

Source: Authors' own calculations

Table 6: Projections of total full-time enrolments, by domicile, 2025/26 - 2045/46

Year	Irish	EU	UK		Non-EU			International total			Overall total		
			GB	NI	S_L	S_M	S_U	S_L	S_M	S_U	S_L	S_M	S_U
2024/25 (actual)	**174,825**	**7,040**	**770**	**855**		**28,030**			**36,690**			**211,540**	
2025/26	178,122	7,437	848	900	30,154	30,154	30,154	39,339	39,339	39,339	217,461	217,461	217,461
2026/27	183,687	7,815	837	929	32,218	32,218	32,218	41,799	41,799	41,799	225,486	225,486	225,486
2027/28	190,069	8,127	829	951	32,604	34,232	34,232	42,511	44,138	44,138	232,580	234,207	234,207
2028/29	194,632	8,383	823	969	32,945	36,200	36,200	43,120	46,375	46,375	237,752	241,007	241,007
2029/30	197,894	8,595	819	982	33,245	36,500	38,127	43,641	46,896	48,524	241,536	244,791	246,418
2030/31	199,058	8,770	817	993	33,510	36,765	40,020	44,088	47,343	50,598	243,146	246,401	249,656
2031/32	199,278	8,914	815	1,001	33,743	36,998	40,253	44,472	47,727	50,982	243,750	247,005	250,260
2032/33	199,477	9,032	813	1,007	33,949	37,204	40,459	44,802	48,057	51,312	244,279	247,534	250,789
2033/34	199,262	9,130	812	1,012	34,131	37,386	40,641	45,085	48,340	51,595	244,347	247,602	250,857
2034/35	198,444	9,211	812	1,016	34,291	37,546	40,801	45,329	48,584	51,839	243,773	247,028	250,283
2035/36	197,696	9,277	811	1,019	34,432	37,687	40,942	45,539	48,794	52,049	243,235	246,490	249,745
2036/37	196,572	9,332	811	1,021	34,557	37,812	41,067	45,721	48,976	52,231	242,293	245,548	248,803
2037/38	194,856	9,377	811	1,023	34,667	37,922	41,177	45,877	49,132	52,387	240,733	243,988	247,243
2038/39	192,810	9,414	811	1,024	34,764	38,019	41,274	46,013	49,268	52,523	238,823	242,078	245,333
2039/40	191,159	9,445	811	1,025	34,849	38,104	41,359	46,130	49,385	52,640	237,289	240,544	243,799
2040/41	189,577	9,470	810	1,026	34,925	38,180	41,435	46,232	49,487	52,742	235,809	239,064	242,319
2041/42	187,536	9,491	810	1,027	34,991	38,246	41,501	46,320	49,575	52,830	233,855	237,110	240,365
2042/43	184,973	9,508	810	1,027	35,050	38,305	41,560	46,396	49,651	52,906	231,368	234,623	237,878
2043/44	182,394	9,523	810	1,028	35,102	38,357	41,612	46,462	49,717	52,972	228,857	232,112	235,367
2044/45	180,039	9,534	810	1,028	35,147	38,402	41,657	46,520	49,775	53,030	226,559	229,814	233,069
2045/46	177,927	9,544	810	1,028	35,187	38,442	41,697	46,570	49,825	53,080	224,497	227,752	231,007

Source: Authors' own calculations

Appendix A List of institutions covered by projections

The higher education institutions (HEIs) with whom the HEA works under statute or who are in receipt of core public funding are listed below. The projections in this table refer to enrolments at these institutions only. Note that the National College of Ireland is not included.

No.	Institution
1	Atlantic Technological University
2	Dublin City University
3	Dun Laoghaire Institute of Art, Design and Technology
4	Dundalk IT
5	Mary Immaculate College, Limerick
6	Maynooth University
7	Munster Technological University
8	National College of Art and Design
9	Royal College of Surgeons
10	South East Technological University
11	Technological University Dublin
12	Technological University of the Shannon
13	Trinity College Dublin
14	University College Cork
15	University College Dublin
16	University of Galway
17	University of Limerick