

# Market Intelligence Brief

## Italy

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# Introduction

Italy is a relatively young peninsular country in Southern Europe, whose current boundaries were defined in 1871. Formerly a monarchy, it has been a republic since a referendum in 1946. Home to the fourth largest population in Europe at 60.4 million, it has the eighth largest economy in the world by GDP, and the 28<sup>th</sup> by GDP per capita. Italy has some of the oldest universities in the world, and its world-famous artistic, architectural, and historical heritage as the seat of the Roman Empire give it a unique place in terms of its influence on European thinking, culture and organization.

Its political geography, characterised by rugged terrain and relatively poor historical communications routes between population centres, in addition to its long history of invasion, migration and shifting power structures, make for a complex socio-political landscape where even those towns and cities which are physically close to each other can show marked differences in governance, cultural habits and organization. Such localised difference is significantly magnified when analysing regional differences, and there remains such a pronounced difference between the prosperity of the Centre/North of the country and the poorer South, that analysis of statistics based on whole-country averages requires careful interpretation.

Home to the EU's lowest birth rate of 7.2 children per 1,000 residents in 2020,<sup>1</sup> Italy recorded in 2021 - for the 13<sup>th</sup> consecutive year - a negative natural demographic balance. According to ISTAT, this trend is no longer counterbalanced by the positive but declining net migration flow, resulting in a net loss of population of 0.4 per cent in 2021, occurring mainly in the South.<sup>2</sup>

Education is compulsory and available without charge to all from ages 6 to 16. A total of 487,000 students graduated from upper secondary education in 2019, including vocational students.<sup>3</sup>

Education represents a key strategic challenge for the country. School education in Italy produces mixed outcomes in terms of basic skills attainment. Compared to 2015, Italy's results in the 2018 OECD Programme for International Student Assessment (PISA) fell in all three areas, with science being particularly poorly rated. And while the EU average for early-school leavers is 10 percent, the rate for Italy is far higher at 15 percent, especially pronounced in the South.<sup>4</sup>

Compared to the EU average, the percentage of people having completed higher education remains low and the number of scientific/technical graduates is insufficient. Despite having better employability rates, vocational-oriented higher education is limited in scope. Shortages in basic and advanced digital skills are a serious concern. Measures to enhance vocational training are slowly being implemented, although according to a 2020 EU Commission report, "a comprehensive approach to upskilling, reskilling and adult learning is lacking".<sup>5</sup>

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<sup>1</sup> World Bank, *Birth rate (crude) per 1,000 people - Italy* <https://data.worldbank.org/indicator/SP.DYN.CBRT.IN?locations=IT> , accessed April 2022

<sup>2</sup> Istituto Nazionale di Statistica (ISTAT), *Dimanica Demografica Anno 2021* [www.istat.it/it/files//2022/03/Dinamica-demografica-2021.pdf](http://www.istat.it/it/files//2022/03/Dinamica-demografica-2021.pdf) , 14 March 2022

<sup>3</sup> Italian National Institute of Statistics, *I.Stat: Schools* <http://dati.istat.it/Index.aspx?QueryId=36852&lang=en>

<sup>4</sup> Eurostat, 2020

<sup>5</sup> European Commission, *Country Report, Italy, 2020*



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Despite such challenges, general government expenditure on education was among the lowest in the EU in 2018, both as a proportion of GDP (3.8 per cent) and total general government expenditure (7.3 per cent).<sup>6</sup>

Despite having a high overall position in world GDP rankings, the country has seen stagnating economic growth and high unemployment levels for several years. A lack of opportunities has resulted in a brain drain, with over 100,000 highly skilled graduates leaving the country in the space of a decade. Relocation has also been strong internally, and according to ISTAT, more than 240,000 young people with medium-high education level relocated from southern regions to northern ones between 2008 and 2017, worsening the brain drain in the former while mitigating it in the latter.

Over 77,000 Italians opted to study overseas in 2019, an increase of 41 per cent compared to five years earlier. In that year the UK was by far the most popular study destination, ahead of Austria, Germany and France, although the post-Brexit change in fee status for EU-domiciled students in 2021 has almost certainly reduced this number significantly. Estimates from UCAS undergraduate clearing data point to a decrease of more than 50 per cent enrolment in the UK in 2021/22 compared with the previous academic year. Incoming mobility of overseas students to Italian tertiary institutions was at 54,855 in 2018, with over 20 per cent of those from China, by far the largest source country.<sup>7</sup>

For those Italians who opt to study domestically, Italy has numerous high-ranking universities and contributes solidly to global research output. Of Italy's 96 accredited universities, 24 ranked in the global top 500 in 2022, according to the Times Higher Education university rankings.

Despite comparatively low investment in research, the Scimago country rankings placed Italy sixth globally in 2020, while the Nature rankings place Italy 13<sup>th</sup> for quality science research output. Italy's academics collaborate widely, with almost a half of scholarly output being the result of international collaboration.

The UK government, through the FCDO and the British Council, has supported the drive towards internationalisation of higher education in Italy and bilateral knowledge exchange, working closely with the Conference of Italian University Rectors (CRUI) and higher education institutions. Among other initiatives is the annual Pontignano Conference, the leading UK/Italy bilateral discussion forum that brings together top decision-makers and influencers from the worlds of government, parliament, business, academia, the media, culture and civil society.

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<sup>6</sup> OECD, *Education at a Glance 2021* [www.oecd-ilibrary.org/education/education-at-a-glance-2021\\_b35a14e5-en](https://www.oecd-ilibrary.org/education/education-at-a-glance-2021_b35a14e5-en)

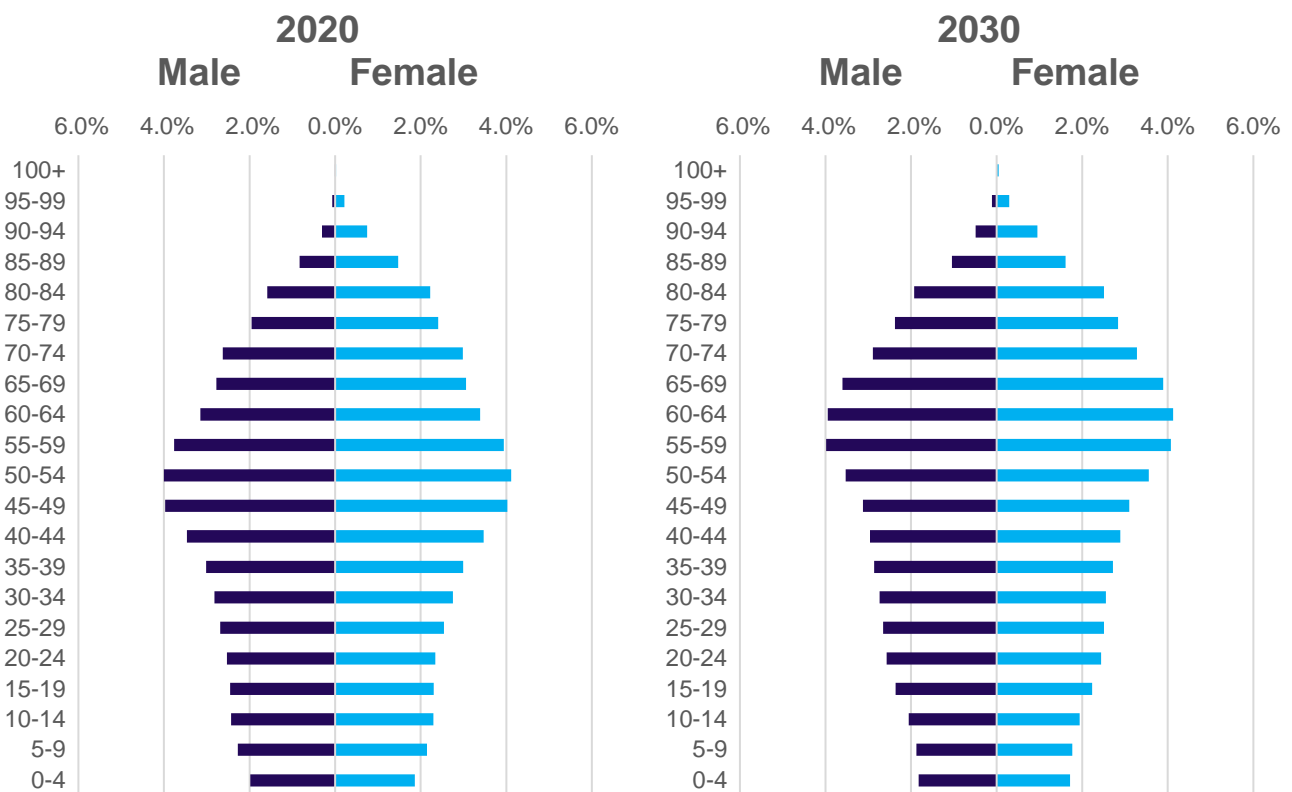
<sup>7</sup> UNESCO Institute for Statistics, *Global Flow of Tertiary-level Students*, <http://uis.unesco.org/en/uis-student-flow>, accessed April 2022

# Macro Environment

## People

Italy has the fourth largest population in Europe and is home to one of the most elderly populations in the world. Its old-age dependency ratio rose from 31 per cent in 2010 to 35 per cent in 2018. It also has a low and diminishing birth-rate – at 7.2 children per 1000 residents in 2020,<sup>8</sup> the lowest in the EU. The prolonged decline in birth-rate was for many years compensated for by positive net immigration, but this has not been the case since 2017. According to UN Population Division estimates the total population was 60.4 million in 2021, down slightly from a peak of 60.7 million in 2017; this is expected to decline further to 59.0 million by 2030.

**Figure 1: Italy’s population pyramid, 2020 and predicted figures for 2030**

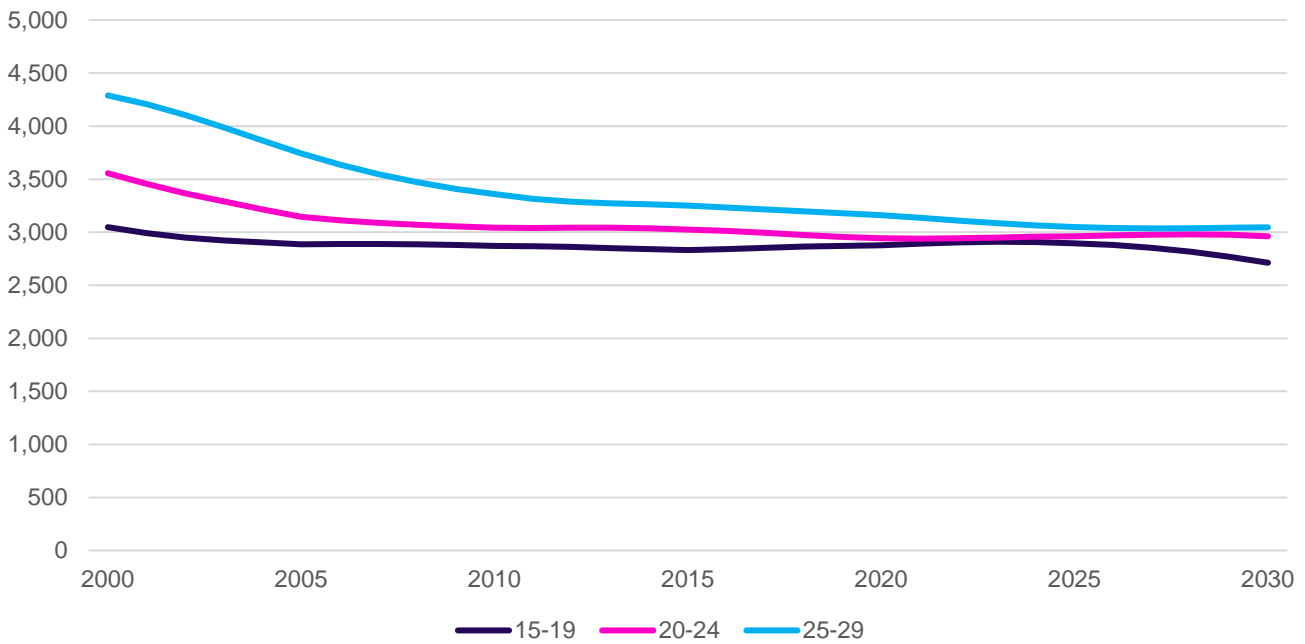


Source: UN Population Division

<sup>8</sup> World Bank, Birth rate (crude) per 1,000 people - Italy <https://data.worldbank.org/indicator/SP.DYN.CBRT.IN?locations=IT> , accessed April 2022

Italy's young population fell rapidly from the 1970s until 2010. The rate of decline has since slowed but the student-age population continues to fall. Between 2000 to 2010 the population aged 15 – 29 fell by 15 per cent. It has fallen by a further 3 per cent since, and the UNDP predicts a further decline of 3 per cent by 2030. The continued gradual decline in the youth population is already causing a drop in students at domestic institutions and is a trend that poses a challenge to UK recruitment of Italian students going forward. The demographic outlook also serves to increase pressure on Italian institutions to attract international students to fill vacant places.

**Figure 2: Italy's student age population (Thousands)**



Source: UN Population Division

The official language of Italy is Italian, but other languages are used to a lesser extent in some regions. Parts of the Trentino-Alto Adige region are predominantly German speaking, French is spoken by a minority in Valle d'Aosta, and the Trieste-Gorizia region has a community of Slovene speakers.<sup>9</sup>

Christianity is the dominant religion in Italy. Christians, predominantly Roman Catholics, account for 83 per cent of the Italian population. The next largest group consider themselves as unaffiliated to a religion, accounting for 12 per cent of Italians. Muslims make up 4 per cent and only 1 per cent follow other religions. Italy is the heartland of Roman Catholicism. The official centre of Roman Catholicism is the Vatican City - technically a separate state despite its location inside of Rome – and religion is deeply imbedded in Italian culture.<sup>10</sup>

The urban population of Italy reached 71 per cent in 2020, an increase of 3 percentage points over the course of a decade. This is well above the 56 per cent global average, but below the EU average of 75 per cent.<sup>11</sup>

<sup>9</sup> CIA, *CIA World Factbook: Italy*, [www.cia.gov/the-world-factbook/countries/italy/](http://www.cia.gov/the-world-factbook/countries/italy/)

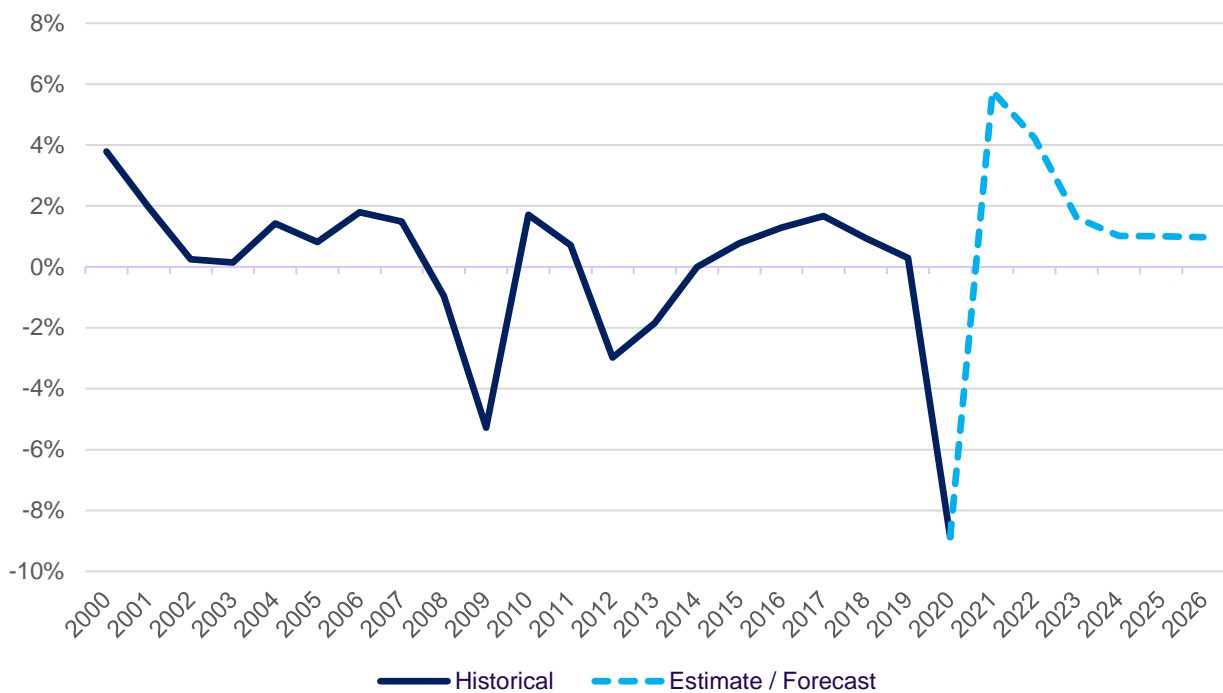
<sup>10</sup> Ibid.

<sup>11</sup> World Bank, *Urban Population - Italy* <https://data.worldbank.org/indicator/SP.URB.TOTL.IN.ZS?locations=IT-1W-EU> , accessed April 2022

## Economy

Italy is the world's eighth largest economy by total GDP, and 28<sup>th</sup> by GDP per capita.<sup>12</sup> Overall figures for the country hide a highly variable economic picture across the regions. The largely rural South of the country has just 55 per cent of the GDP per capita of the more industrial Centre and North, one of the most economically productive and wealthy regions of the European continent. Italy faces significant economic challenges, such as stagnating economic output, high unemployment, high public debt and falling disposable household income.

**Figure 3: Real GDP growth and forecast**



Source: IMF

Italy was the first country in Europe to be struck by the global Covid-19 pandemic and accordingly suffered a major hit to GDP growth in 2020. The country recorded a GDP contraction of 8.9 per cent in 2020 in real terms, but the IMF predicts a rebound to 6.0 per cent growth in 2021 and 4.3 per cent in 2022. Decreased tax revenues due to the lockdown and increased government expenditure pushed the budget deficit to 5.1 per cent of GDP in 2020. The primary budget is positive, but interest on government debt weighs heavily on Italy's accounts.<sup>13</sup>

The services industry contributes 66 per cent of GDP and employs 71 per cent of the working population. Tourism is the fastest growing and most profitable industry in Italy as the fifth most visited country in the world.

Industry, meanwhile, contributes 21 per cent of GDP, employing 26 per cent of the working population. Much of the sector comprises small and medium sized family businesses: most Italian industrial companies have fewer than 50 employees. Italy is strong in the luxury goods sector,

<sup>12</sup> IMF, *IMF World Economic Outlook, 2021*

<sup>13</sup> Santander Trade, *Italy: Economic and Political Outline* <https://santandertrade.com/en/portal/analyse-markets/italy/economic-political-outline>, June 2021.

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being the largest exporter of luxury goods in the world. Notable export sectors include industrial machinery, vehicles, food, beverages and textiles. Italy remains the second largest manufacturing power in Europe, although its overall manufacturing output has diminished gradually since 2008.

Agriculture contributes just 2 per cent of GDP and employs 4 per cent of the working population. This is despite its position as Europe's largest producer of rice, fruits, vegetables and wine.<sup>14</sup>

The unemployment rate in Italy was already high before the ongoing global Covid-19 pandemic and was pushed higher in 2020. In the year following the beginning of the Covid-19 pandemic, over 1 million Italians lost their jobs.<sup>15</sup> Provisional OECD data for 2021 indicates total unemployment of 10 per cent, compared to 7.4 per cent for the EU 19. More worrying is the long-term unemployment figure, which shows that 52 per cent of Italy's unemployed have been out of work for 12 months or more, compared to the 34 per cent EU average.<sup>16</sup>

The picture is starkest among the young population. Youth unemployment in 2019 was 29 per cent, the third highest in Europe after Greece and Spain, and considerably higher than the EU average of 17 per cent. Italy also has the highest proportion of economically inactive people in the EU, some 35 per cent of those aged 15-64.<sup>17</sup>

Italy is the second most indebted country in Europe after Greece, with a government debt-to-GDP ratio of 184 per cent in 2020, twice the average for the EU 19 countries. The figures for public debt include the impacts of national stimulus packages to combat the detrimental economic effects of the continuing Covid-19 pandemic.<sup>18</sup>

After a volatile period between 2008 and 2013, foreign direct investment inflows into Italy followed a generally increasing trend for several years but turned negative in 2020, in line with a worldwide drop in FDI. In terms of inflows as a percentage of GDP, Italy had already been one of the poorer performers in Europe, with inflows representing only 1.5 per cent of GDP in 2019.<sup>19</sup>

Limited success in attracting FDI compared to the rest of Europe could be attributed to a number of barriers. Administrative processes are slow and labour costs high. The socioeconomic north-south divide, as well as corruption and organised crime, may inhibit more widespread investment. There are, however, also attractive factors: Italy is one of the largest markets in the EU, has a diversified economy and, in certain regions at least, a skilled workforce. It also remains one of the major manufacturing hubs of Europe.<sup>20</sup>

Italy placed 30<sup>th</sup> in the 2019 World Economic Forum Global Competitiveness Rankings, rising one position on the previous year. Within the EU, Italy ranked 11<sup>th</sup> in the same ranking. It placed much

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<sup>14</sup> Santander Trade, *Italy: Economic and Political Outline* <https://santandertrade.com/en/portal/analyse-markets/italy/economic-political-outline>, June 2021.

<sup>15</sup> World Bank, *Unemployment, youth total – Italy, World, European Union*

[https://data.worldbank.org/indicator/SL.UEM.1524.NE.ZS?locations=IT-1W-EU&most\\_recent\\_value\\_desc=true](https://data.worldbank.org/indicator/SL.UEM.1524.NE.ZS?locations=IT-1W-EU&most_recent_value_desc=true), accessed 11 June 2021; The Local Italy, *Italy loses almost one million jobs in a year to the coronavirus crisis* [www.thelocal.it/20210406/italy-loses-almost-one-million-jobs-in-a-year-to-the-coronavirus-crisis/](http://www.thelocal.it/20210406/italy-loses-almost-one-million-jobs-in-a-year-to-the-coronavirus-crisis/) 06 April 2021.

<sup>16</sup> OECD, *OECD data* <https://data.oecd.org/unemp/long-term-unemployment-rate.htm>, 2021

<sup>17</sup> Eurostat, *Economically inactive people in the EU: who are they?*, 05 July 2017.

<sup>18</sup> OECD, *OECD data 2021* <https://data.oecd.org/unemp/long-term-unemployment-rate.htm#indicator-chart>; Eurostat, *Government debt up to 97.3 per cent of GDP in euro area* [https://ec.europa.eu/eurostat/documents/portlet\\_file\\_entry/2995521/2-21012021-AP-EN.pdf/a3748b22-e96e-7f62-ba05-11c7192e32f3](https://ec.europa.eu/eurostat/documents/portlet_file_entry/2995521/2-21012021-AP-EN.pdf/a3748b22-e96e-7f62-ba05-11c7192e32f3), 21 January 2021.

<sup>19</sup> UNCTAD, *General Profile: Italy* <https://unctadstat.unctad.org/CountryProfile/GeneralProfile/en-GB/380/index.html>

<sup>20</sup> UNCTAD, *World Investment Report 2020*, UNCTAD, accessed 11 June 2021; *Italy: Foreign Investment*, Santander Trade, June 2021.



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lower on the World Bank's 2020 Ease of Doing Business ranking, 58th globally and 21<sup>st</sup> of the 27 EU nations.<sup>21</sup>

Italy has been a member of the Euro-area since 1999 and officially adopted the Euro in 2002.<sup>22</sup> One GBP traded at an average of EUR 1.13 throughout 2020, with the Euro weakening against the pound to an average of EUR 1.16 in 2021.<sup>23</sup> As of mid-April 2022, the Euro had weakened further to EUR 1.20 per pound. A weaker euro versus the pound makes it more expensive for Italians to study in the UK.

## Government and education policy

Italy is a parliamentary democracy. The country has a President, but their role is mainly ceremonial. The Prime Minister is the head of government and holds executive power. The President appoints the Prime Minister and parliament confirms same. Italy has a bicameral parliament consisting of the senate and the chamber of deputies, both of which hold significant powers.

Italy is a longstanding member of the EU, joining the European Common Market in 1958.<sup>24</sup> It is also a member of both the G7 and G20, and held the presidency of the G20 for 2021.<sup>25</sup>

The current serving President is Sergio Mattarella, who has held the position since February 2015. The Prime Minister is Mario Draghi, who replaced Giuseppe Conte in February 2021. Draghi was formerly the president of the European Central Bank, where he was credited with saving the Euro monetary union.<sup>26</sup>

Draghi took the reins of the new government at a particularly complicated time for Italy's democracy. Former Prime Minister Conte led a coalition government formed of the Five Star Movement and Democratic Party until his government was brought down due to disagreement about how to tackle the economic crisis brought on by the pandemic.<sup>27</sup> Draghi now leads a coalition of no fewer than six parties after winning a confidence vote. Only the far-right Brothers of Italy party and some members of the Eurosceptic Five-Star Movement voted against approving Draghi's government.<sup>28</sup>

Political uncertainty therefore provides a disconcerting backdrop to the government's attempts to push through vital reforms, not least in education.

Governance of the education system in Italy has since January 2020 been divided between two ministries: the Ministry of Education (*Ministero dell'istruzione*), which as of April 2022 was led by Patrizio Bianchi, and the Ministry of Universities and Research (*Ministero dell'Università e della*

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<sup>21</sup> WEF, *Global Competitiveness Report 2019* [www3.weforum.org/docs/WEF\\_TheGlobalCompetitivenessReport2019.pdf](http://www3.weforum.org/docs/WEF_TheGlobalCompetitivenessReport2019.pdf); World Bank, *Ease of Doing Business 2019* [www.doingbusiness.org/en/rankings](http://www.doingbusiness.org/en/rankings). More recent versions of the WEF's global competitiveness report have not ranked countries, in recognition of the "turbulent time for the global economy" caused by Covid-19, while the World Bank ceased publishing their Ease of Doing Business rankings in 2021.

<sup>22</sup> European Commission, *Italy and the euro* [https://ec.europa.eu/info/business-economy-euro/euro-area/euro/eu-countries-and-euro/italy-and-euro\\_en#adoption](https://ec.europa.eu/info/business-economy-euro/euro-area/euro/eu-countries-and-euro/italy-and-euro_en#adoption)

<sup>23</sup> Banca d'Italia, *Average Rates* <https://tassidicambio.bancaditalia.it/terzevalute-wf-ui-web/averageRates>, accessed 11 June 2021.

<sup>24</sup> Europa.eu, Italy: Overview [https://europa.eu/european-union/about-eu/countries/member-countries/italy\\_en](https://europa.eu/european-union/about-eu/countries/member-countries/italy_en)

<sup>25</sup> G20, *Italian G20 Presidency: Priorities* [www.g20.org/italian-g20-presidency/priorities.html](http://www.g20.org/italian-g20-presidency/priorities.html)

<sup>26</sup> Investopedia, *Who is Mario Draghi?* [www.investopedia.com/investing/who-mario-draghi/](http://www.investopedia.com/investing/who-mario-draghi/) 29 April 2021.

<sup>27</sup> Reuters, *Italy's Renzi pulls his party from ruling coalition* [www.reuters.com/article/us-italy-politics-renzi-idUSKBN29I2I9](http://www.reuters.com/article/us-italy-politics-renzi-idUSKBN29I2I9), 14 January 2021.

<sup>28</sup> Euronews, 18 February 2021 [New Italy PM Mario Draghi easily wins Senate backing for unity government](https://www.euronews.com/en/italy/2021/02/18/new-italy-pm-mario-draghi-easily-wins-senate-backing-for-unity-government),

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Ricerca), currently led by Maria Cristina Messa. This dual system replaces the Ministry of Education, Universities and Research which was until that date responsible for designing the structure of school education and its curriculum and defining the goals for the development of the education system.<sup>29</sup>

At the school level, minimum standards are set at the national level but individual schools have a high level of autonomy, defining their own curriculum and the activities that the school will engage in. This is laid out by each school in a “three-year educational offer plan”. National and regional-level authorities are jointly responsible for early childhood education.

At higher education level, institutions also have a high level of autonomy. Recent education strategy - beyond the emergency measures brought in to ensure continued education provision during the pandemic - has focused on the following priority areas:<sup>30</sup>

- The provision of financial help to ensure uptake of formal early years childcare,
- Training and financing initiatives to tackle Italy’s large NEET (not in employment, education or training) population
- The introduction of a unified strategy for the Internationalization of Higher Education, involving increased funding for mobility, reduced bureaucracy for foreign students, and a new “one-stop shop” digital platform for foreign academics and students.
- Funding for new tenure-track assistant professors to encourage renewal of the academic faculty body.
- Improving the uptake and provision of vocational training and qualifications, with universities given more freedom to set up experimental vocational undergraduate degrees in conjunction with partner organizations and industry.
- Initiatives aimed at improving digital literacy across the population, namely through the project “Repubblica Digitale”.<sup>31</sup>

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<sup>29</sup> MIUR, Mission and function <https://miur.gov.it/web/quest/missione-e-funzione>

<sup>30</sup> Eurydice, *Italy: National Reforms in Higher Education* [https://eacea.ec.europa.eu/national-policies/eurydice/content/national-reforms-higher-education-33\\_en](https://eacea.ec.europa.eu/national-policies/eurydice/content/national-reforms-higher-education-33_en) 2021

<sup>31</sup> Repubblica Digitale, 2021 <https://teamdigitale.governo.it/it/repubblica-digitale>

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# Domestic Education Environment

## Overview

Education is compulsory from ages 6 to 16<sup>32</sup> and is organised into primary school up to age 11, lower secondary until age 14 and upper secondary.<sup>33</sup> Upper secondary is divided into three possible routes: general education at *licei*, technical education at *istituti tecnici* and vocational education at *istituti professionali*.

At the end of upper secondary education, typically at age 19, students receive a certification that gives access either to universities, higher education institutions for the fine arts, music and dance (*Alta formazione artistica, musicale e coreutica*) or to the higher technical institutes (*Istituti tecnici superiori*).

While students are able to leave school from the age of 16, the majority go on to complete upper secondary. While the proportion of early leavers – those aged 18-24 who did not complete upper secondary education - has fallen from almost 18 per cent in 2011 to just above 13 per cent in 2020, Italy's proportion of early school leavers is still considerably above the EU average of 10 per cent<sup>34</sup>.

Class size in Italy is below average in primary schools but above average at secondary level. In primary schools, an average of 19 students were enrolled per class in 2019, with no significant difference between public and private schools. Secondary level schools had an average of 21 students per class in 2019, but private upper secondary classes were much smaller with an average of 13 students per class. A total of 487,000 students graduated from upper secondary education in 2019, including vocational students.<sup>35</sup> Just over 8 per cent of these students graduated from private schools.

Up until the Global Covid-19 pandemic, Italian students sat the Maturità examination at the end of upper secondary school. While the pandemic continues, students sit only one part of the Maturità. Considered a rite of passage in Italy, it symbolically marks when a person reaches adulthood and maturity. The Maturità consists of four parts: a general essay, an exam specific to a student's field of study, a written test covering all subject matters tackled in the final year and an oral interview.<sup>36</sup>

Italy faces a number of pressing challenges in relation to its education provision and uptake. Its population is ageing and shrinking, and there is a notable skills gap in relation to market needs, with digital and scientific expertise insufficient to meet current, let alone future, demand. Italy has among the highest average school drop-out rates in the EU, and Southern Italy has the highest. Graduate employment rates are also lower than the EU average, contributing to a significant brain

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<sup>32</sup> MIUR, *Compulsory Education* [www.miur.gov.it/obbligo-scolastico](http://www.miur.gov.it/obbligo-scolastico)

<sup>33</sup> European Commission, *Education and Training Monitor 2020 – Italy* <https://op.europa.eu/webpub/eac/education-and-training-monitor-2020/countries/italy.html>

<sup>34</sup> Eurostat, *Early leavers from education and training by sex and labour status*, accessed April 22 2022

[https://ec.europa.eu/eurostat/databrowser/view/EDAT\\_LFSE\\_14\\_custom\\_2551043/default/table?lang=en](https://ec.europa.eu/eurostat/databrowser/view/EDAT_LFSE_14_custom_2551043/default/table?lang=en)

<sup>35</sup> Italian National Institute of Statistics, *I.Stat: Schools* <http://dati.istat.it/Index.aspx?QueryId=36852&lang=en>

<sup>36</sup> Italics Magazine, *A one-year farewell to Italy's final exams as we know them* <https://italicsmag.com/2020/04/30/a-one-year-farewell-to-italys-final-exams-as-we-know-them/>, 30 April 2020

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drain as graduates move from the South to the North of the country or to other nations in search of better job prospects. Successive governments have attempted legislation to counteract these trends, with the provision of new vocational and technical training structures and schemes seen as one route to rebalancing market needs and skills. Public investment in education remains lower than the EU average, however, and the private sector is not doing enough to make up the shortfall, with lower-than-average numbers of adults involved in on-the-job training. The upskilling of Italy's adult population, many of whom did not have the advantage of upper secondary education, is key to redressing the skills gap challenge.

In September 2020 Italy was the first country to introduce climate change in the school curriculum.

## Early years, primary and secondary education

Regarding the provision of pre-primary education, the share of children under 3 in formal childcare was 26 per cent in 2018, with major disparities across regions.<sup>37</sup> Participation in early childhood education and care (ECEC) for 3-6-year-olds is almost universal. The 2015 school reform introduced the “*integrated education system from 0 to 6*”, which is designed to improve availability and reduce existing geographical disparities, which are particularly apparent in pre-school formal childcare. The 2020 Budget Law strengthens financial support for families with children aged 0 to 3 enrolled in ECEC.

Secondary Education has been particularly hard-hit by teacher shortages. At the start of the 2019/20 school year, only 50 per cent of vacancies were filled, with the remainder of posts being taken up by supply teachers. The shortages are more acute in some regions and subjects, particularly science. Despite several reform attempts, the procedures for selecting and hiring teachers do not currently ensure a reliable supply of qualified and well-trained teachers. Teacher salaries are low across the educational sector in Italy, with the ratio of teachers' salaries to earnings of full-time workers with tertiary education qualifications being among the lowest among OECD countries.<sup>38</sup>

Italy performs below the overall average of participating countries in the international PISA survey. In 2018, Italy's average score across the three tested areas of mathematics, science and reading was 477, eleven points below the international average of 488. This performance compares unfavourably with the 2015 survey, when the gap was only 4 points.

Scores in mathematics, at 487, are slightly below the global average of 489. However, this also represents a fall from 3 points above the average in 2015. Reading and science scores are slipping further below average in each survey. In 2018, reading scores were 11 points below the international reading average of 487, and science scores were a full 21 points below the international average of 489.<sup>39</sup> Results also vary according to type of school, with students in upper general education (*licei*) scoring significantly higher than those in vocational education.

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<sup>37</sup> In 2017/2018 coverage ranged from 9 per cent of eligible children in Campania to 4.7 per cent in Valle D'Aosta (ISTAT 2019a and EUROSTAT).

<sup>38</sup> OECD, *Education GPS*

<sup>39</sup> OECD, *PISA Data Explorer* <https://pisadataexplorer.oecd.org/ide/idepisa/>

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The north-south regional socioeconomic divide exerts a profound effect on education provision, particularly on drop-out rates. The school drop-out rate in the southern city of Naples, for example, is about 20 per cent, double the European average. Overall, Italy has the highest drop-out rate in Europe, and schools have reported that the global Covid-19 pandemic has further exacerbated the problem, though it is still too early for official statistics.<sup>40</sup>

## Technical and vocational education & training

Technical and vocation education & training (TVET) is delivered through technical and professional institutes in Italy. Courses at the technical institutes last for two years, while courses at the professional institute can last as long as five years and may lead to enrolment in university.<sup>41</sup>

Italy is struggling to upskill its working-age population to meet changing market demands and TVET will undoubtedly have a key role to play if Italy is to revive its waning productivity and stagnating economy. Italy has a much higher proportion of adults aged 25-64 without upper secondary education qualifications (38 per cent) compared to the EU average (22 per cent), and a lower percentage of adults actively in training.

Digital skills are a particular area of concern. In 2019, 42 per cent of the Italian population had at least basic digital skills (below the EU average of 58 per cent) and only 22 per cent had more advanced digital skills (EU average is 33 per cent).<sup>42</sup> Attempts are being made to improve the situation, the recently launched project “Repubblica Digitale” being one.<sup>43</sup> Repubblica digitale, according to the Italian Ministry for Technical Innovation and Digital Transition, is “the national strategic initiative that aims to combat the cultural digital divide present in the Italian population , support maximum digital inclusion and promote education on the technologies of the future”.<sup>44</sup>

Despite these initiatives, Italy has no comprehensive digital skills strategy targeting the digital literacy of the population at large, apart from the National Plan for Digital Schools, and public investment in technical, scientific and digital skills remains low. The private sector also invests less in ICT training for employees than firms in the EU on average.<sup>45</sup> The mismatch between skills and opportunities is posing a threat to productivity, with 54 per cent of Italian companies experiencing difficulties in recruiting personnel for jobs requiring ICT specialist skills in 2019.<sup>46</sup> According to the EU Joint Research Centre, Italy is among the countries likely to be most exposed to future mismatches in advanced digital skills.<sup>47</sup>

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<sup>40</sup> New York Times, *Italy's problem with school dropouts goes from bad to worse in pandemic*, 26 April 2021 [www.nytimes.com/2021/04/26/world/europe/italy-schools-covid-dropouts.html](https://www.nytimes.com/2021/04/26/world/europe/italy-schools-covid-dropouts.html)

<sup>41</sup> MIUR, *Vocational Institutes* [www.miur.gov.it/web/quest/istituti-professionali](http://www.miur.gov.it/web/quest/istituti-professionali) ; MIUR, *Technical Institutes* [www.miur.gov.it/web/quest/istituti-tecnici](http://www.miur.gov.it/web/quest/istituti-tecnici) .

<sup>42</sup> Eurostat - *Community survey on ICT usage in Households and by Individuals*.

<sup>43</sup> Project launched by the Digital Transformation Team (<https://teamdigitale.governo.it/it/repubblica-digitale>) and mobilizing stakeholders to undertake actions promoting digital skills.

<sup>44</sup> <https://innovazione.gov.it/progetti/repubblica-digitale/>

<sup>45</sup> Eurostat - *Community survey on ICT usage and eCommerce in Enterprises*

<sup>46</sup> Ibid.

<sup>47</sup> EU Science Hub, [The changing nature of work and skills in the digital age](#)



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The skills problem is particularly evident among low-qualified adults. According to EU Commission data, only 2 per cent of Italy's 12 million low-qualified adults are currently in training, and are competing for a total of only 2.5 million suitable roles.

Various governments have attempted to introduce measures to improve vocational education provision and uptake, but progress appears slow. Since 2003, Italy's legislation on apprenticeships has regulated a scheme under which candidates can obtain upper- and post-secondary-level qualifications – type 1 apprenticeships – which replicate certain features of schemes in Germany, Austria and Switzerland. Unfortunately the scheme has never been extensively implemented, despite attempts to finesse the model through a reform in 2015, creating a dual system of apprenticeships and defining an operational framework for the recognition of regional qualifications.

Perhaps reflecting a lack of public clarity regarding the role and value of the new apprenticeship schemes, and a resulting lack of uptake, in August 2019, the State-Regions Conference adopted the National Repository of Education and Training Qualifications and Professional Qualifications, covering qualifications from general education, higher education and TVET qualifications. A ministerial decree is expected to follow soon. A new national network of professional schools is also planned, aiming to improve TVET governance, regional vocational centres and their link with the labour market.

While the percentage of post-secondary students who opt for technical vocational education at an *Istituto Tecnico Superiore* (ITS) is very low (2 per cent in 2018)<sup>48</sup>, those who follow this route have higher employment prospects than those opting for an academic undergraduate path, with 80 per cent of finishers finding employment within a year, compared to 68 per cent of academic graduates. The ITS system, set up in 2008 along the lines of the German Fachhochschule, trains senior technicians in strategic technological areas for economic development and competitiveness. With strong participation from schools, business, universities and local authorities, ITSs appear to have strong potential for closing Italy's skills gap, but low take-up indicates that the Italian public remains unsure of their value. To counteract such resistance and improve perceptions, a new type of vocational tertiary degree (*lauree professionalizzanti*) has been piloted since 2018/19, and has resulted in 31 courses in technical areas identified as critical to Italy's strategic development. In close cooperation with professional associations, tertiary-educated highly specialised professionals are trained to undergraduate level in construction and environment, engineering, energy and transport, among other subjects. Take up remains patchy but the initiative is still in its infancy.

## Higher education

Higher education and research in Italy have since 2020 fallen under the auspices of the Ministry for University and Research (MUR). It acts to coordinate and monitor the activities of universities and non-academic tertiary institutions (*Istituti Tecnici Superiori*).

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<sup>(48)</sup>EU Commission Report Italy, 2020.

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The MUR recognises and accredits 97 universities, 67 of which are public institutions. Of the 30 private institutions, 11 are distance learning institutions.<sup>49</sup> Italy has 26 universities in the top 500 as placed in the 2021 Times Higher Education University Rankings. The University of Bologna, founded in 1088, is considered the oldest in the world and is the highest ranked Italian university, placing 172<sup>nd</sup> in the world. The Sapienza University of Rome and the Scuola Normale Superiore di Pisa closely follow at joint 197<sup>th</sup>. Public universities occupy the top 5 positions in Italy's rankings. The Vita-Salute San Raffaele University is the highest ranked private University.<sup>50</sup>

According to the World Bank, Italy's tertiary gross enrolment rate (GER) was 66 per cent in 2019, 7 percentage points lower than the EU average. The GER has been increasing since 2015 at a more rapid rate than the EU as a whole. However, while enrolment as a proportion of the student age population is rising, the number of students enrolled in tertiary education is declining, down 6 per cent since peaking in 2009.<sup>51</sup>

In the 2020/21 academic year there were 1.8 million students enrolled in Italian higher education.<sup>52</sup> Undergraduate degrees account for 62 per cent of enrolments while 38 per cent are at postgraduate level. Female students outnumber males at both the undergraduate and postgraduate levels, making up 56 per cent of all students. In 2019, tertiary educational attainment within the 30-34 age group stood at 28 per cent, among the lowest levels in the EU, where the average was 40 per cent in the same year.

Tuition fees at Italian universities differ depending on the institutions, the course studied and the nationality of the student. Public university tuition fees for EU students can range from free to EUR5,000 per academic year. Non-EU students often pay higher fees. Private university fees tend to be much higher and are typically set at the same level for both EU and non-EU students. Fees at private institutions can range from EUR3,000 to as high as EUR35,000.<sup>53</sup>

An increasing number of Italian graduates are leaving Italy, alongside their non-graduate counterparts. Of the 157,000 Italians who moved overseas in 2018, 27,000 held a tertiary degree, representing a 6 per cent increase on the previous year. Taking into account Italians returning home, Italy has suffered a net loss of over 100,000 highly skilled people in the space of 10 years.<sup>54</sup>

The domestic job market plays a role in the sustained exodus of graduates from Italy. The employment rate of recent graduates is considerably lower than the EU average. In 2019, only 59 per cent of graduates aged 20-34, having left education within three years, had found employment, compared to 81 per cent overall in the EU. And while the graduate employability rate increased by nearly 3 per cent across the EU from 2009-2019, it fell by 2 per cent in Italy.<sup>55</sup>

Research output is a strength of the Italian higher education sector. Italy performs highly on international research rankings, and in 2020 it ranked sixth globally in the Scimago country

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<sup>49</sup> MUR, *Accredited University institutions*, [www.miur.gov.it/web/guest/istituzioni-universitarie-accreditate](http://www.miur.gov.it/web/guest/istituzioni-universitarie-accreditate) accessed April 2022.

<sup>50</sup> Times Higher Education, *World University Rankings 2022*

[www.universityrankings.ch/results?ranking=Times&region=World&year=2021&q=Italy](http://www.universityrankings.ch/results?ranking=Times&region=World&year=2021&q=Italy)

<sup>51</sup> World Bank, *School enrollment, tertiary – European Union, Italy, World* <https://data.worldbank.org/indicator/SE.TER.ENRR?locations=EU-IT-1W> accessed April 2022

<sup>52</sup> MIUR Higher Education Data Portal, *Enrolments per academic year* <http://dati.ustat.miur.it/dataset/iscritti/resource/e76fcb62-22c5-4ff9-a425-e06f3d6f8330>

<sup>53</sup> QS TopUniversities, *Study in Italy* [www.topuniversities.com/where-to-study/europe/italy/guide](http://www.topuniversities.com/where-to-study/europe/italy/guide)

<sup>54</sup> European Commission, *Education and Training Monitor 2020 – Italy* <https://op.europa.eu/webpub/eac/education-and-training-monitor-2020/countries/italy.html>

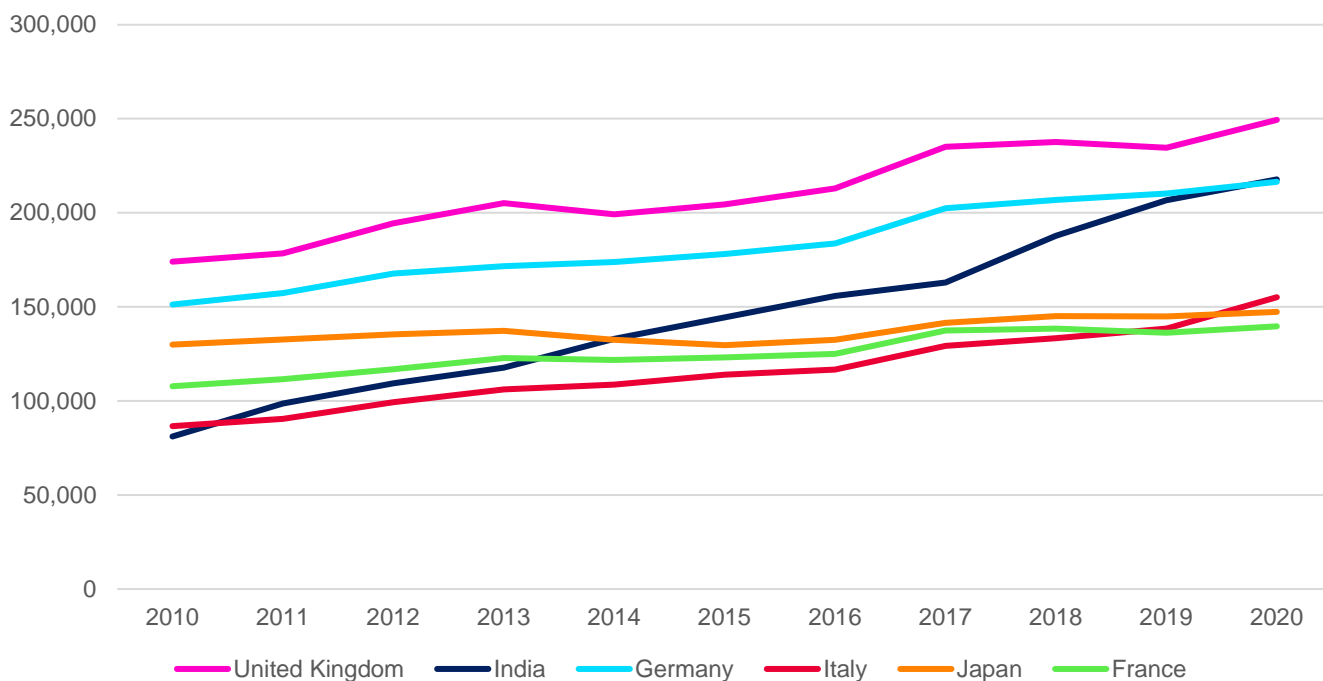
<sup>55</sup> Ibid.

rankings, producing 127,500 citable documents.<sup>56</sup> The 2020 Nature ranking for high-quality scientific research output placed Italy 12<sup>th</sup> in the world and sixth in Europe.<sup>57</sup> Yet, Italy spends just 1.4 per cent of GDP on research and development, compared to an EU average of 2.2 per cent.<sup>58</sup>

Italy's research output is largely achieved through international collaborations, which accounted for 46 per cent of total publications in 2020.<sup>59</sup> Scholarly output is balanced across a variety of disciplines, with particular strengths in the fields of Medicine, Social Sciences, Engineering and Biochemistry.

Italy's scholarly output overtook that of France in 2020 but is considerably lower than that of the UK and Germany, as well as the US and China (not shown on the chart below). The rapid growth in research output in 2020 is likely influenced by the result of early collaboration around the Covid-19 pandemic, with Italy being the first European country to experience large scale infections.

**Figure 4: Scholarly publications over time, selected countries**



Source: SCImago Journal & Country Rank. The two top countries by research output – the US and China – are not shown on this chart, in order to show the trend in Italy more clearly.

International collaboration by Italian academic researchers is strongest with the US, followed by the UK, then Germany, France and Spain.

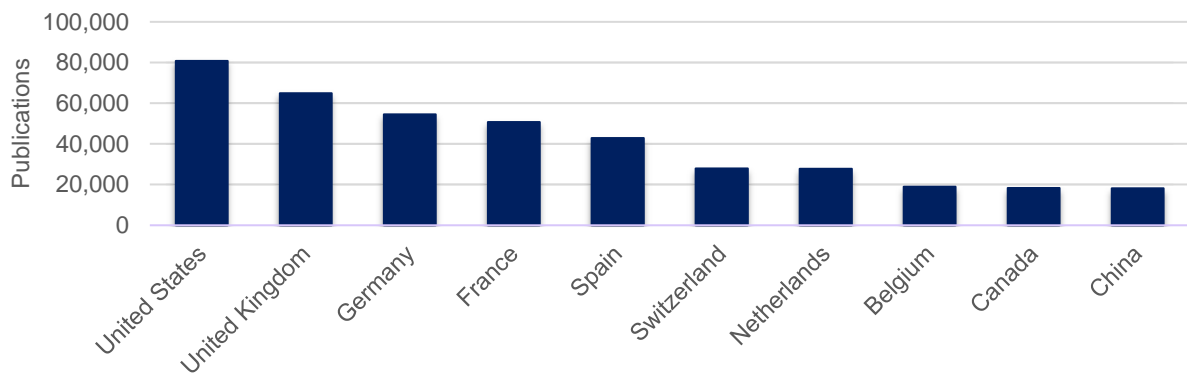
<sup>56</sup> Scimago, *Country Rank* [www.scimagojr.com/countryrank.php?year=2020](http://www.scimagojr.com/countryrank.php?year=2020), accessed April 2022

<sup>57</sup> Nature Index, *2021 tables: countries/territories* [www.natureindex.com/annual-tables/2021/country/all](http://www.natureindex.com/annual-tables/2021/country/all)

<sup>58</sup> World Bank, *Research and development expenditure – Italy, European Union, World* <https://data.worldbank.org/indicator/GB.XPD.RSDV.GD.ZS?locations=IT-EU>, accessed April 2022

<sup>59</sup> 2021 Elsevier B.V. SciVal, RELX Group and the RE symbol are trademarks of RELX Intellectual Properties SA, used under license.

**Figure 5: Italy's top 10 collaborative research partner countries, 2016-2020**



Source: Elsevier SciVal<sup>60</sup>

Despite its relatively strong position in terms of scholarly output, Italy is facing a significant challenge regarding academic staff renewal. Over 20 per cent of academic staff were aged 60 years or older in 2017 and only 14 per cent were under 40.<sup>61</sup> In 2019, the government allocated additional funding for 1,500 tenure-track positions for assistant professors to be distributed among public universities based on institution size and quality of research.

<sup>60</sup> 2021 Elsevier B.V. SciVal, RELX Group and the RE symbol are trademarks of RELX Intellectual Properties SA, used under license.

<sup>61</sup> Online data code: educ\_uae\_perp01

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# International Education

## Student mobility

### Outbound and inbound.

Italy welcomed almost 55,000 international students in 2019, according to UNESCO. China is the largest sender, responsible for over 20 per cent of student inflow to Italy, followed by India (5.5 per cent), Iran (5 per cent) and Turkey (3.5 per cent). Iran features particularly highly due to a longstanding tradition of Iranian students completing higher education in Italy, including tens of thousands of Iranians who moved there between the 1950s and 1970s. Fewer than 600 UK students studied a tertiary education programme in Italy in 2019.

The Italian Ministry of Foreign Affairs and International Cooperation offers grants to assist foreign citizens in Italy and Italian citizens abroad to foster cultural, scientific and technological fields with the aim of promoting Italy and supporting Italy's economic system and position in the world. However, funding was only available for renewals of existing grants at recognised Italian institutions in 2020.<sup>62</sup>

More Italians study overseas than the country attracts to its shores. There were around 77,500 Italians studying at tertiary level overseas in 2019 according to UNESCO, a 27 per cent increase on 2015. The UK attracted the highest number of internationally mobile Italian students, representing 18.5 per cent of the total, while the remainder of the top 5 destination countries – Austria, Germany, France and Spain respectively – were all EU member states.

### UK recruitment

While Italian tertiary education enrolments in the UK more than doubled in the decade to 2017/18, the number of Italy-domiciled students studying in UK HE programmes started to decline in 2018 and showed an accelerating rate of decrease in more recent years. In 2020/21, the most recent year for which data is available, the total number of enrolments was 16,360 which represents a 5 per cent decline over the previous year.

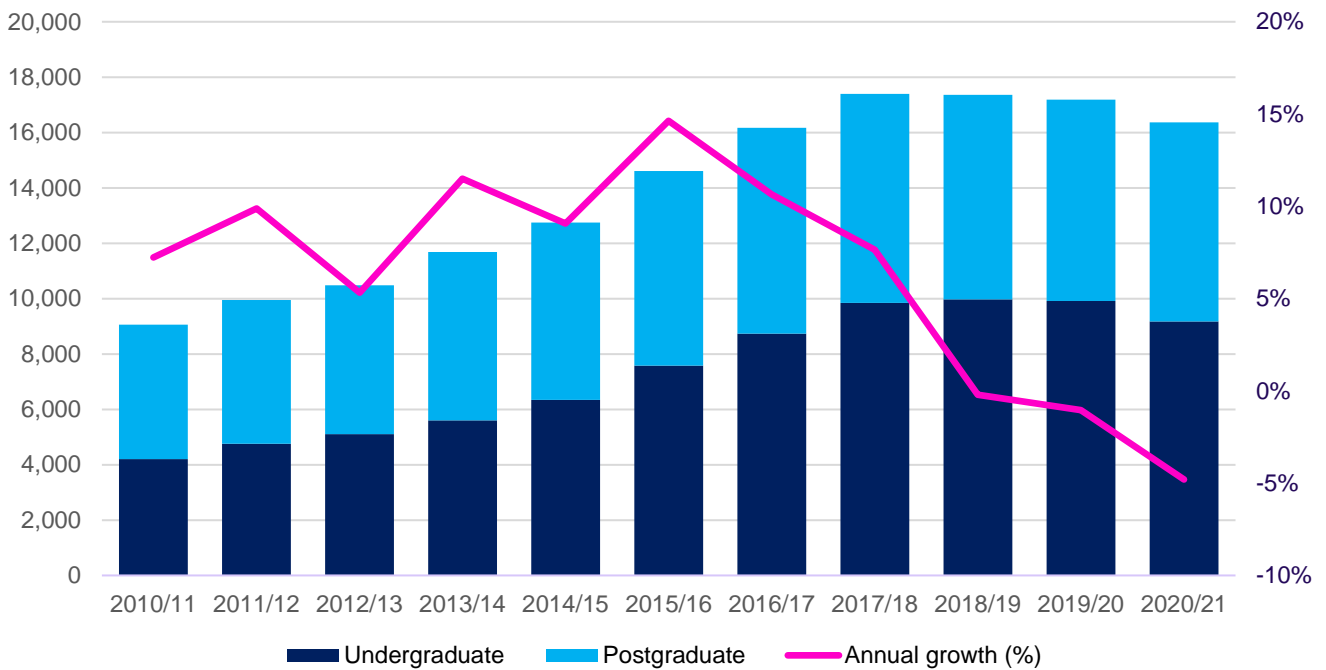
Although still a relatively even split, undergraduate enrolments have gradually taken a larger share of Italian enrolments in the UK. Undergraduate enrolments in 2020/21 reached 56 per cent of the total, an increase of 10 percentage points compared to a decade earlier.

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<sup>62</sup> Study in Italy, Grants for foreign and Italian students living abroad awarded by the Italian Government <https://studyinitaly.esteri.it/en/call-for-procedure>



**Figure 6: Italian higher education enrolments in the UK**



Source: HESA

The decline over the last few years is most likely related to the UK's decision to leave the European Union in 2016. The removal of home-fee status for EU-domiciled students from 2021, along with the introduction of visas for EU citizens, has caused an even sharper drop. UCAS undergraduate acceptances in 2021 for students domiciled in Italy have fallen by 50 per cent, in line with acceptances from EU students in general which were also down by 50 per cent.

Despite the high fees and the pandemic, Italian students are still interested in studying in the UK and are motivated by the high quality of teaching, innovative methodology, international experience and more interesting career prospects. The opportunity of studying abroad is seen to enrich their employability prospects with experiences ranging from curricular internships and post-study work.

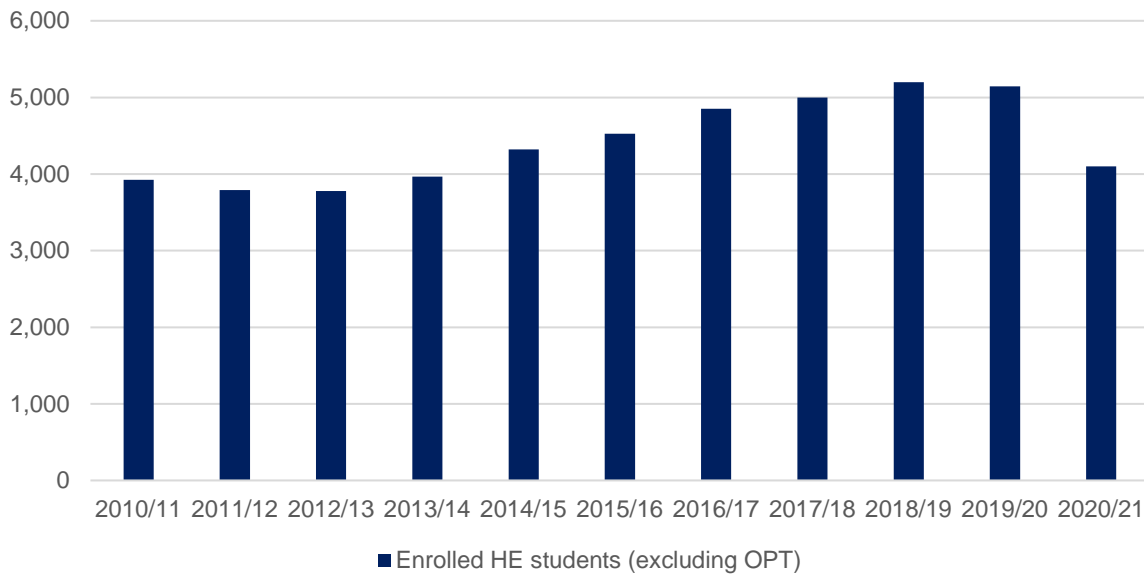
The most popular subjects are business and management, social sciences, creative arts & design, and engineering & technology.

The British Council is a key organisation for supporting the numbers of Italian students in the UK. The main stakeholders for engaging with prospective students are private and public schools, school counsellors and education agents.

## Other English-speaking markets

The US remains an attractive study destination for Italians. Italian HE enrolments in the country rose fairly consistently over the five years to 2018, before appearing to plateau in 2019, with a total of just over 5,000 students. Student numbers dropped somewhat in the 2020/21 academic year, falling to 4,098 enrolments (excluding participants in the OPT post-study work scheme), likely as a result of the Covid-19 pandemic.

**Figure 7: Italian higher education enrolments in the US**

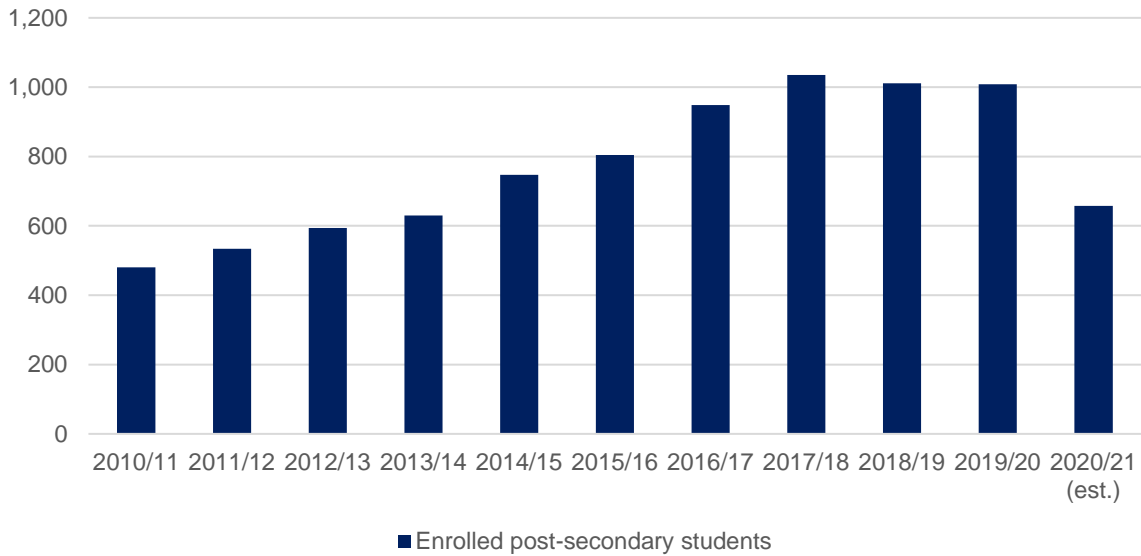


Source: IIE

Data from Canada shows that this is a much less popular destination for Italian students, with just over 1,000 students in the 2019/20 academic year – roughly flat compared to two years earlier, but up substantially over a decade ago.

While official statistics on student enrolments are not yet available for the 2020/21 academic year, data on active study permits suggests a substantial decrease in Italian student numbers, with a 35 per cent drop in study permits held by Italian citizens at all levels. If the trend in post-secondary students is in line with this decrease, around 660 Italians would have studied in Canadian HEIs in 2020/21.

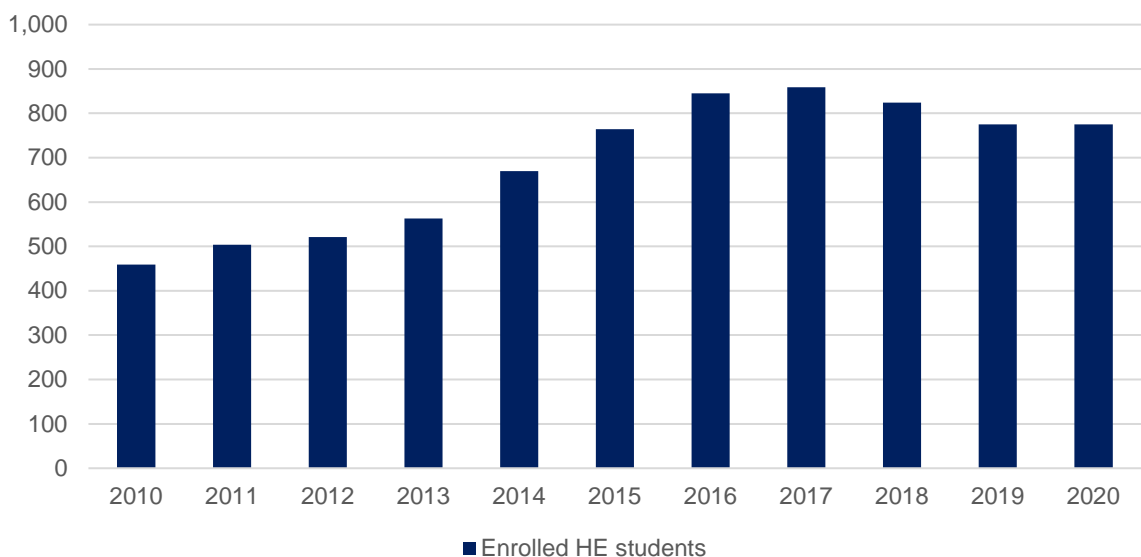
**Figure 8: Italian higher education enrolments in Canada**



Source: StatCan (to 2019-20); British Council estimate based on data from StatCan and Immigration, Refugees & Citizenship Canada (2020-21).

Australia’s popularity appears to have been waning among Italian students in recent years, with numbers having fallen 10 per cent since their high point of 859 in 2017. As with Canada, this is far below the number of Italians studying in the UK or US.

**Figure 9: Italian higher education enrolments in Australia**



Source: AusTrade

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## Internationalisation, transnational education and distance learning

Like most OECD countries, Italy sees the internationalisation of higher education as a vital component of its education strategy, but its shrinking young population makes the attraction of foreign students of particular importance. In the academic year 2018/19, there were 466 first- and second-cycle programmes that were considered international, including joint and double degrees and programmes taught in English with at least 10 per cent of students coming from abroad.<sup>63</sup> The teaching offer in English is growing, though it is concentrated in the areas of engineering, IT, economics and business, as well as doctorates. Currently, almost one-third of doctoral programmes in Italy use English as the principal language of instruction and publication, with more than half of these being accredited as Innovative Doctorates for Internationalisation. The supply of summer or winter schools and master's programmes in English is also growing.

The drive towards internationalization of Italian universities in recent times is also reflected in the increase in postgraduate courses delivered in English and linked to the main university research areas, post-graduate professionally-oriented courses, research doctorates, winter and summer schools. Such educational offer, together with first-cycle and second-cycle courses in English, is where Italian universities are investing to attract international students and researchers, while simultaneously attracting many Italians who see English as essential to their futures.

University programmes of first and second cycle taught entirely in English have grown from 245 to 539 in the last five years (+120 per cent). In 2020/21 they represent 11 per cent of the overall degree programmes (against 5 per cent six years ago). The most popular PG programmes delivered in English are economics, medicine, modern language, and scientific areas (aerospace, agriculture, cultural heritage, cyber security, internet, life science, smart energy, and sustainable mobility).<sup>64</sup>

Foreign universities do not have a strong physical presence in Italy, but there are exceptions. The American University of Rome and John Cabot University are degree-granting American universities recognized by the Italian Ministry of Education and duly authorized to operate in Italy. Several major US universities offer semester- or year-long study programs in Florence. The European School of Economics offers bachelors and MBA programmes in Rome, Milan and Florence. Italy has since 2004 regulated the recognition of academic titles awarded by foreign universities operating on its territory.<sup>65</sup>

Data from HESA shows that 2,565 students were studying for UK higher education programmes within Italy in the 2020/21 academic year, a 14 per cent increase over a year earlier after student enrolments had been broadly static over the preceding decade. This figure does not include students enrolled on programmes intended to be delivered on an in-person basis, even if those students were studying online due to the pandemic.

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63 OECD The Internationalisation of Higher Education in Italy <https://www.oecd-ilibrary.org/docserver/b2718f34-en.pdf?expires=1639135162&id=id&accname=quest&checksum=77B9B0F418112C6161BDDFB3D56FEAA9>

<sup>64</sup> Ibid.

<sup>65</sup> Decree n. 214 of April 26, 2004

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A little over half of these transnational students are enrolled on distance learning programmes, predominantly with the Open University and the University of London. King's College London has strong links with over 10 Italian Universities for exchange programmes including La Sapienza, Bocconi University and University of Bologna. There are no UK branch campuses in Italy, though several UK universities have over 100 students enrolled on classroom-based programmes, generally in niche areas such as osteopathy and fashion design.



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## UK Cooperation

The UK government, through the FCDO and the British Council, has supported the drive towards internationalisation of higher education in Italy and bilateral knowledge exchange, working closely with the Conference of Italian University Rectors (CRUI) and higher education institutions. Among other initiatives is the annual Pontignano Conference, the leading UK/Italy bilateral discussion forum that brings together top decision-makers and influencers from the worlds of government, parliament, business, academia, the media, culture and civil society. The Conference represents a unique platform to support and drive educational partnerships between the two countries and maintain strong bilateral relations. During this year's conference an education lunch with a group of influential representatives from the university sector looked at reimagining tertiary education for a post-pandemic world. Outputs from the lunch focussed on the potential for the sector in both countries to explore together the next stage of digital learning through such measures as collecting and sharing data on the effectiveness of learning and the overall student experience of digital, hybrid and F2F learning.

More broadly, the UK and Italian governments have collaborated recently on several major initiatives. Italy and the UK worked closely together as co-presidents of the Glasgow COP-26 global climate conference, organizing initiatives such as the Together for Tomorrow event in Glasgow in November 2021, which brought together select Ministers of Education and Ministers of Environment/Ministers responsible for Climate Change from all global regions as panellists. The event was the first large gathering of its kind to focus on the significant role of education in empowering and equipping communities to take action against climate change.

Talks have also been held to explore pathways towards boosting trade between the two countries, particularly in areas such as the life sciences, defence and security as well as digital and technology. Italy is also keen to attract investment to support the growth of its start-ups, and UK expertise in areas such as low-carbon energy, the food and drink industry and tech sector is valued.<sup>66</sup> Increased trade and collaboration in these areas would present opportunities for knowledge exchange through education and research collaboration.

Italy and the UK are both members of the G7 group of countries, and as such have stated a commitment to improving educational opportunity and equality around the globe, and in particular “the empowerment and equal opportunity of girls and women, especially in developing contexts and countries struggling with conflict”.<sup>67</sup>

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<sup>66</sup> [www.gov.uk/government/news/uk-and-italy-announce-new-dialogue-to-boost-exports-and-investment](https://www.gov.uk/government/news/uk-and-italy-announce-new-dialogue-to-boost-exports-and-investment)

<sup>67</sup> [G7 Declaration on Gender Equality, 2019](#)