Context to support the Review of Coherent Provision and Sustainability – Phase 1 Report
Locations of Scotland’s 26 Colleges

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Locations of Scotland’s 19 Universities

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Scotland’s people and qualifications

45% of the Scottish population qualified to HE level

58% of school leavers studying at HE level by the age 30

12% of school leavers enrolled on a HE course at college

28% of school leavers enrolled on a FE course at college
In Scotland, 45.3% are educated to HND, Degree and Higher Degree level or equivalent which is higher than the UK average (39.5%).

The number of individuals, as well as the percentage of the population educated to the highest level (SCQF level 4 and above) has increased over time in the last 10 years. In addition, we have less people with no qualifications at all. Therefore, we now have a more educated population in general as well as a more highly educated population.
This table shows the majority of school leavers enter further education after S5 and S6. Most students gain entry requirements after S5 but choose to stay to complete S6. Those who study Advanced Highers at S6 are more likely to go on to study higher education courses, either at University or at College.
In Scotland, college provision is distributed over a wide variety of levels whereas university provision is more contained to levels 7-12.

Both universities and colleges deliver activity at levels 7 and 8. Even though content and curriculum can be very different, this overlap shows the opportunity to explore more efficiency between the sectors to deliver education at these levels.
Demographic profile by domicile

Scotland’s colleges provide education to 265,000 students and universities provide education to 253,000 students. Most students at both universities and colleges are from Scotland. International and EU students make up just under 30% of students at university. It is likely that post-Brexit and following the recent announcement of changes to funding EU students, the number of EU students may fall.
Theme 1 – Keeping the interests of current and future students and equalities at the heart of everything we do

Student Satisfaction

Students studying at Scottish institutions report high levels of student satisfaction.

Students at Scottish universities are more likely to be satisfied with their course than those at UK equivalents.

National Student Survey 2020, SFC College Student Satisfaction Survey 2018-19
Theme 1 – Keeping the interests of current and future students and equalities at the heart of everything we do

Graduate Outcomes
Of all the 2017-18 college graduates, between 3 and 6 months after graduation, 95% of graduates were in positive, meaning employment or further study.

In the University sector, meanwhile, 95% of qualifiers from Scottish Universities were in positive destinations 15 months after graduation in 2017-18. Of those graduates who were in employment, 79% were in ‘high-skilled’ roles.
Theme 1 – Keeping the interests of current and future students and equalities at the heart of everything we do

Widening Access
SFC work with the college and university sectors to promote equality of access. 15.9% of university students were from SIMD20 areas in 2018-19, the highest share since Commission on Widening Access was implemented. The interim target is 16% by 2021-22, meaning universities have almost met this target early.

**Entrants**

- **15.9%** of Scottish-domiciled first degree** entrants (4,900) to Scottish universities were from the 20% most deprived areas in Scotland***
  - ↑ 0.3pp* on 2017-18

- **24.8%** of Scottish-domiciled undergraduate entrants (8,960) to Scottish colleges were from the 20% most deprived areas in Scotland***
  - ↑ 0.5pp* on 2017-18

- **320** care-experienced entrants to first degree** level study in 2018-19.
  - Compared to 255 on 2017-18

* Percentage points.
** All first degree figures here refer to full-time student.
*** CoWA Recommendation 32: By 2030, students from the 20% most deprived backgrounds should represent 20% of entrants to higher education.

Theme 3 – Towards an integrated, connected tertiary education and skills eco-system

Equity of access
This table shows the percentage of students from each local authority who go on to study at university and college. There’s a marked difference across authorities with students from East Ayrshire more likely to be entering into college (60%) and those from East Renfrewshire significantly more likely to enter university education (70%).
Theme 3 – Towards an integrated, connected tertiary education and skills eco-system

Flexibility of Provision
The majority of students on college courses study part-time (74.1%), showing the flexibility in provision.

On the other hand, most students enrol at university on full-time courses (77.2%), mainly undergraduate courses.

The number of students studying part-time may change as a result of changes to the labour market.

SFC INFACT database, HE Students and Qualifiers
<table>
<thead>
<tr>
<th><strong>£1.94bn</strong></th>
<th>The net economic contribution from universities through the export of education, research and commercialisation equating to a 2.4% share of Scotland’s exports.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>£55,000</strong></td>
<td>The estimated boost to productivity for the Scottish economy per college graduate</td>
</tr>
<tr>
<td><strong>64,200</strong></td>
<td>The number of people Scotland’s colleges and universities employ.</td>
</tr>
<tr>
<td><strong>£11</strong></td>
<td>The amount of investment returned on every £1 of public investment into Scotland’s universities.</td>
</tr>
<tr>
<td><strong>£6.30</strong></td>
<td>The amount of investment returned on every £1 of public investment into Scotland’s colleges.</td>
</tr>
</tbody>
</table>

*Source – Universities Scotland, Audit Scotland, Colleges Scotland, Fraser of Allander, HESA, SFC*
Theme 5 – Building long-term relationships with employers and industry

Future jobs in Scotland will require increasing and decreasing numbers of workers skilled at different levels. These table shows the changes to jobs by occupation and industry from now to 2027 as predicted by Oxford Economics.

### Net change in employment by industry in Scotland, 2017-2027 (000's)

Source: Oxford Economics, 2017

<table>
<thead>
<tr>
<th>Industry</th>
<th>Change</th>
<th>2017</th>
<th>2027</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation and food service activities</td>
<td>115</td>
<td>29.8</td>
<td></td>
</tr>
<tr>
<td>Administrative and support service activities</td>
<td>-4.1</td>
<td>6.2</td>
<td></td>
</tr>
<tr>
<td>Agriculture, forestry and fishing</td>
<td>23.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arts, entertainment and recreation</td>
<td>-2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Construction</td>
<td>-2.6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education</td>
<td>-2.6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Electricity, gas, steam and air conditioning</td>
<td>-13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial and insurance activities</td>
<td>14.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Human health and social work</td>
<td>5.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information and communication</td>
<td>5.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manufacturing</td>
<td>26.4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mining and quarrying</td>
<td>-7.9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other service activities</td>
<td>-13.4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professional, scientific and technical activities</td>
<td>2.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public administration and defence</td>
<td>2.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Real estate activities</td>
<td>2.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transportation and storage</td>
<td>2.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Water, sewerage and waste management</td>
<td>2.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wholesale/retail/repair of motor vehicles</td>
<td>14</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Net forecast change by occupation (people), 2017-2027 ('000's)

Source: Oxford Economics, 2017

<table>
<thead>
<tr>
<th>Occupation</th>
<th>2017</th>
<th>2027</th>
<th>Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>SOC 1 - Managers, directors and senior officials</td>
<td>223.2</td>
<td>227.5</td>
<td>4.3</td>
<td>2%</td>
</tr>
<tr>
<td>SOC 2 - Professional occupations</td>
<td>530.9</td>
<td>546.6</td>
<td>15.7</td>
<td>3%</td>
</tr>
<tr>
<td>SOC 3 - Associate professional and technical occupations</td>
<td>339.7</td>
<td>347.1</td>
<td>7.4</td>
<td>2%</td>
</tr>
<tr>
<td>SOC 4 - Administrative and secretarial occupations</td>
<td>263.5</td>
<td>263.2</td>
<td>-0.3</td>
<td>-0.1%</td>
</tr>
<tr>
<td>SOC 5 - Skilled trades occupations</td>
<td>277.7</td>
<td>283.0</td>
<td>5.3</td>
<td>2%</td>
</tr>
<tr>
<td>SOC 6 - Caring, leisure and other service occupations</td>
<td>246.4</td>
<td>256.6</td>
<td>10.1</td>
<td>4%</td>
</tr>
<tr>
<td>SOC 7 - Sales and customer service occupations</td>
<td>228.8</td>
<td>235.0</td>
<td>6.2</td>
<td>3%</td>
</tr>
<tr>
<td>SOC 8 - Process, plant and machine operatives</td>
<td>160.8</td>
<td>157.7</td>
<td>-3.1</td>
<td>-2%</td>
</tr>
<tr>
<td>SOC 9 - Elementary Occupations</td>
<td>289.0</td>
<td>299.3</td>
<td>10.3</td>
<td>4%</td>
</tr>
</tbody>
</table>

SDS Tables. Source – Oxford Economics
Theme 5 – Building long-term relationships with employers and industry

School leavers have a number of routes available in order to secure jobs in Scotland.

This figure shows the routes from school to employment through different levels of education and it identifies the proportion of people needed at each occupation level (SOC).

It also shows that future jobs in Scotland will change, requiring the workforce to adapt. In order to deliver a compatible workforce, colleges and universities will need to adapt their curriculum offer as well as offering lifelong learning opportunities for those needing to upskill or reskill.
Theme 5 – Protecting and leveraging the excellence of our research and science base

Scottish universities secure over £750m of research funding into Scotland, supporting thousands of jobs and providing a magnet for investment.

However when looking at research income, the proportion of awards secured by Scottish universities has slightly declined in comparison to other UK HEIs.
Theme 6 – Protecting and leveraging the excellence of our research and science base

Renewable Energy  Agriculture & food  Digital & Data Science  Creative Industries & Gaming

Health & Life Sciences  Robotics & Space Science  Optoelectronics, Imaging, Lasers & Sensors  Arts & Culture  Advanced Manufacturing & Materials

Scotland’s research strengths
Scotland’s Research Landscape 2007-16

Scotland’s researchers are highly productive

Scotland has increased its research output: 15% between 2007-11 and 2012-16.

Scotland has the highest average number of citations per researcher:
27% ahead of nearest comparator country
63% ahead of the UK average (between 2007-2015).

Scotland’s researchers are highly mobile

Over 89% of Scottish researchers have published outside Scotland — compared with the UK figure of 72%.

Scotland is a global collaborator

Scotland’s share of joint publications with EU partners is higher than England and Wales.

Scotland’s international collaboration has a higher impact than the UK average:

Top 6 collaborating countries:
1. USA
2. Germany
3. France
4. Italy
5. Australia

Academic-corporate joint publications are increasing in Scotland and have a 33% higher impact than the UK average.

Scotland’s academic-corporate joint publications have increased by 14% between 2007-11 and 2012-16.

Scottish Science Advisory Council
Theme 7 – Driving the innovation agenda

1154
The number of active spin out companies in 2017/18 in Scotland.

£613m
The estimated generated turnover from these companies – 19% of the UK total.

200-2000
The average number of businesses each college in Scotland will engage with.

29%
The percentage of contract research with SMEs Scotland’s universities deliver.

£1.5bn  The amount Scotland’s universities contribute towards Scotland’s export total.

38%  The percentage of academic research staff from outside the UK (2018/19).

7  The number of world-leading innovation centres.

3  The number of universities in the top 200 in the world (QS).

Theme 10 – Focusing on the financial sustainability of colleges and universities, both sectors and current funding models

Colleges Income 2018/19

- Tuition Fees and Education Contracts: £120,118,000
- Research grants and contracts: £2,551,000
- SFC/RSB Grants: £585,902,000
- Investment Income: £158,000
- Other Income: £64,488,000
- Donations and Endowments: £755,000
- College Income: £773,972,000
Universities Income 2018/19

- Tuition Fees and Education Contracts: £1,285,411,000
- Research grants and contracts: £818,297,000
- Funding body grants: £1,202,718,000
- Other Income: £664,701,000
- Donations and Endowments: £60,638,000
- Investment Income: £36,888,000

Total Income: £4,068,653,000
Financial Position of Colleges and Universities

The number of colleges expected to operate on a deficit in 2020-21 is likely to be 13 out of 26.

The number of universities with underlying operating deficits is forecast to be 15 out of 19 institutions in 2020-21.
Theme 10 – Focusing on the financial sustainability of colleges and universities, both sectors and current funding models

Tuition Fee Income
This table shows tuition fee income to universities, broken down by domicile. It shows the variance across universities and that some have a reliance on income from Non-EU fees.