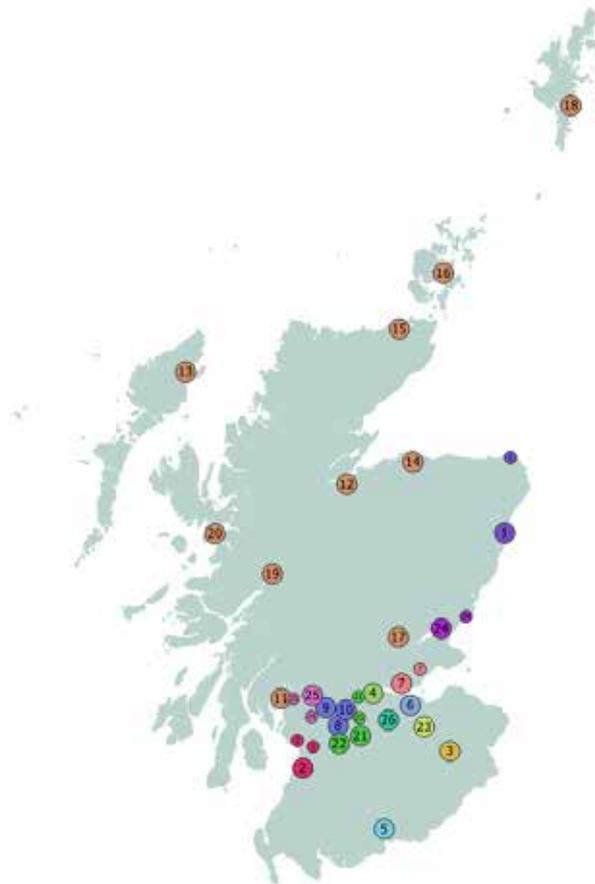




Context to support the Review of Coherent Provision and Sustainability – Phase 1 Report

Locations of Scotland's 26 Colleges

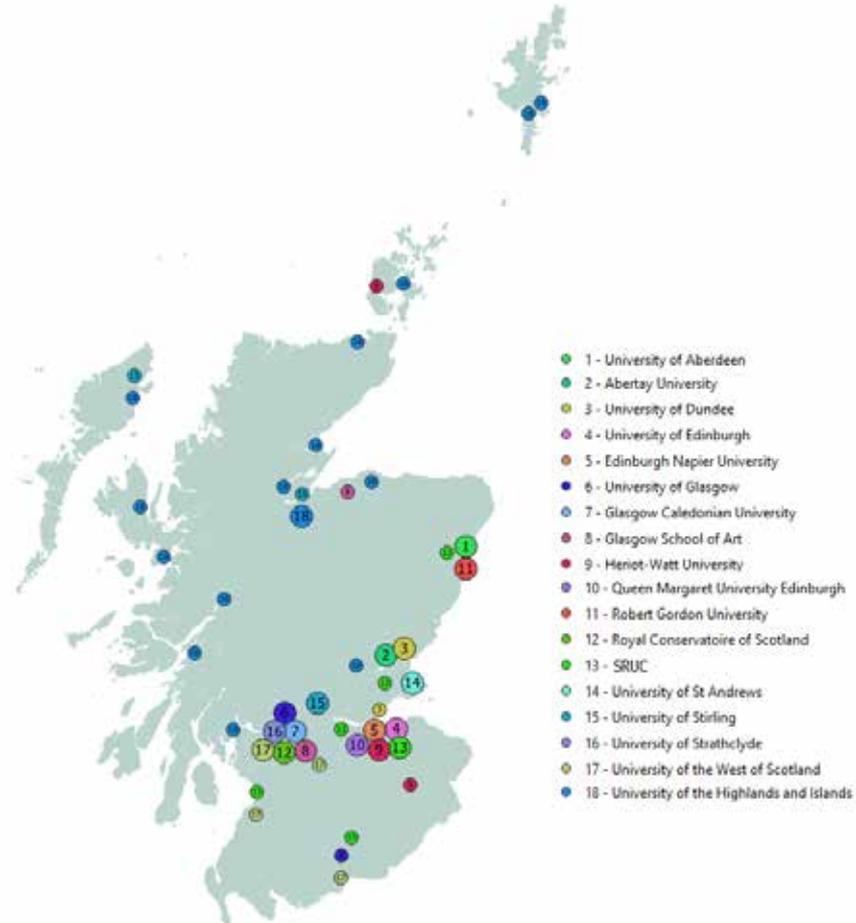
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1	Aberdeenshire	North East Scotland College
2	Ayrshire	Ayrshire College
3	Borders	Borders College
4	Central	Forth Valley College
5	Dumfries and Galloway	Dumfries and Galloway College
6	Edinburgh	Edinburgh College
7	Fife	Fife College
8	Glasgow	City of Glasgow College
9	Glasgow	Glasgow Clyde College
10	Glasgow	Glasgow Kelvin College
11	Highlands and Islands	Argyll College UHI
12	Highlands and Islands	Inverness College UHI
13	Highlands and Islands	Leven Castle College UHI
14	Highlands and Islands	Moray College UHI
15	Highlands and Islands	North Highland College UHI
16	Highlands and Islands	Orkney College UHI
17	Highlands and Islands	Perth College UHI
18	Highlands and Islands	Shetland College UHI
19	Highlands and Islands	West Highland College UHI
20	Highlands and Islands	Sebat Mòr Orlais UHI
21	Lanarkshire	New College Lanarkshire
22	Lanarkshire	South Lanarkshire College
23	N/A	Newbattle Abbey College
24	Tayside	Dundee and Angus College
25	West	West College Scotland
26	West Lothian	West Lothian College

Locations of Scotland's 19 Universities

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Scotland's people and qualifications

45%

OF THE
SCOTTISH
POPULATION
QUALIFIED TO HE
LEVEL

12%

OF SCHOOL
LEAVERS
ENROLLED ON A
HE COURSE AT
COLLEGE

58%

OF SCHOOL
LEAVERS
STUDYING AT HE
LEVEL BY THE
AGE 30

28%

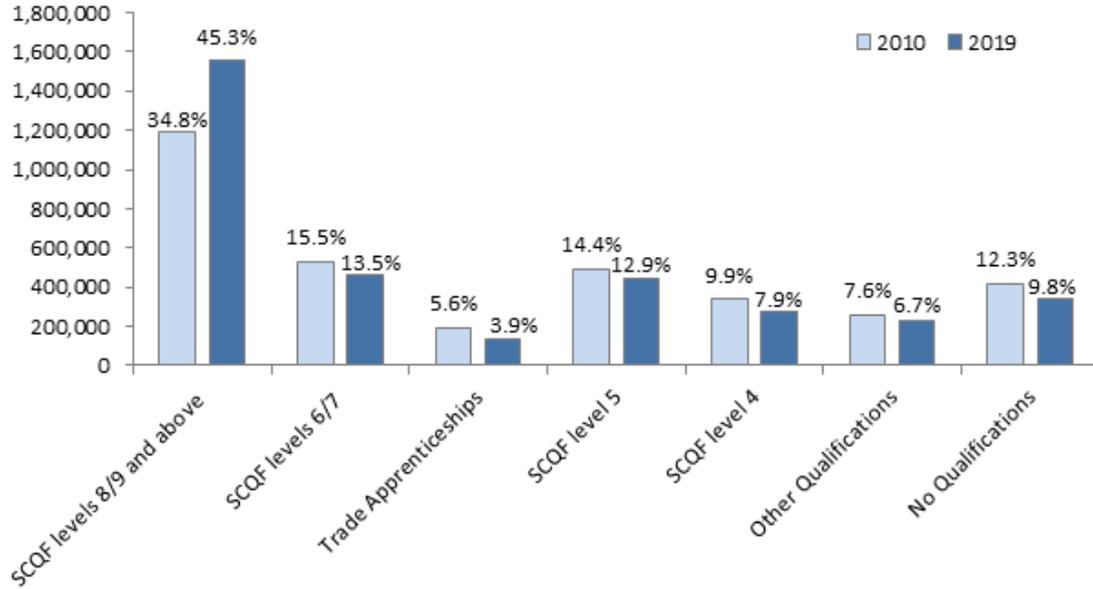
OF SCHOOL
LEAVERS
ENROLLED ON A
COURSE AT
UNIVERSITY

27%

OF SCHOOL
LEAVERS
ENROLLED ON A
FE COURSE AT
COLLEGE

Scotland's people and qualifications

Qualifications held by those age 16-64 in Scotland

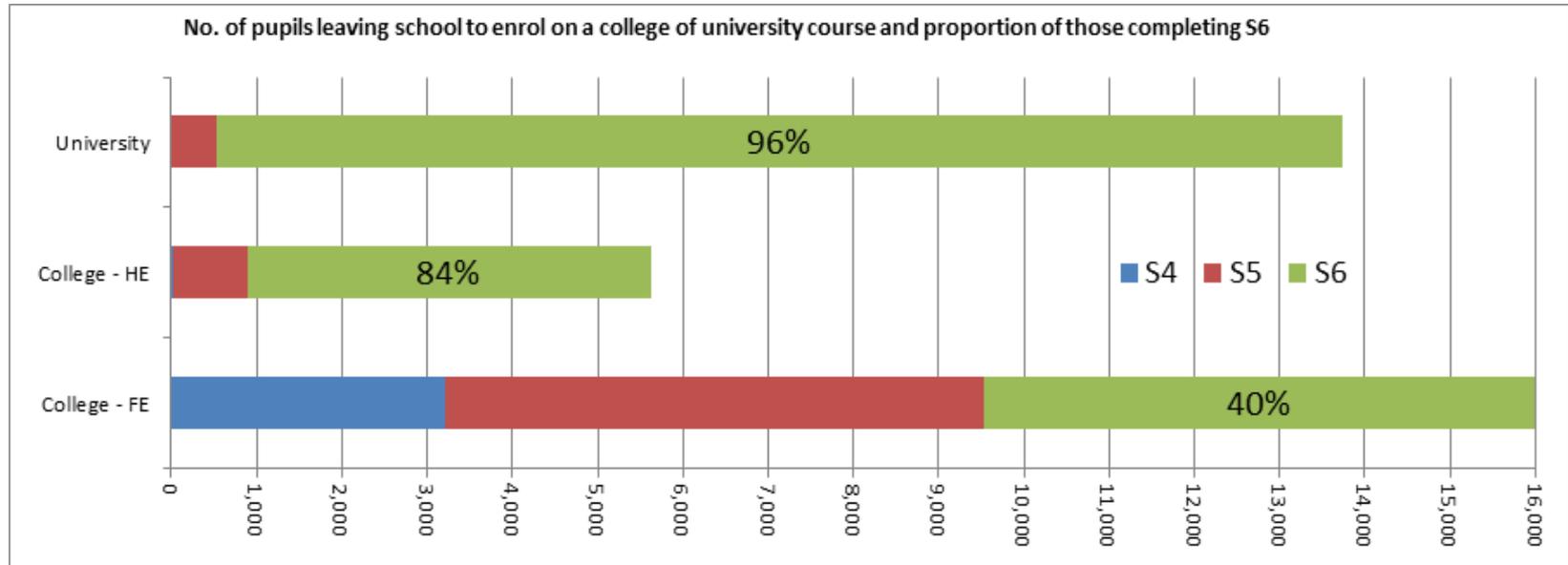


In Scotland, 45.3% are educated to HND, Degree and Higher Degree level or equivalent which is higher than the UK average (39.5%).

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.

Scotland's people and qualifications

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.



Scotland's people and qualifications

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.

SCQF distribution of SFC funded FTEs

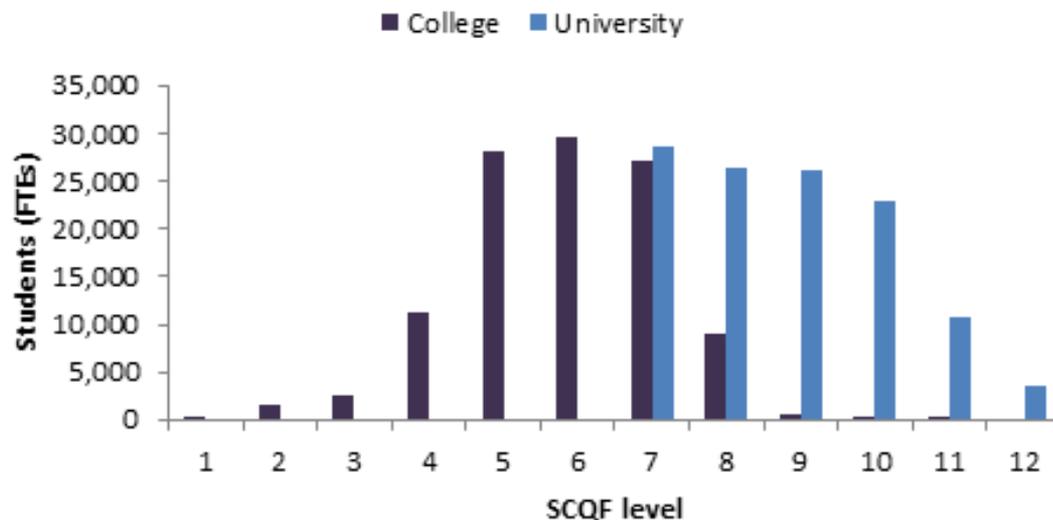


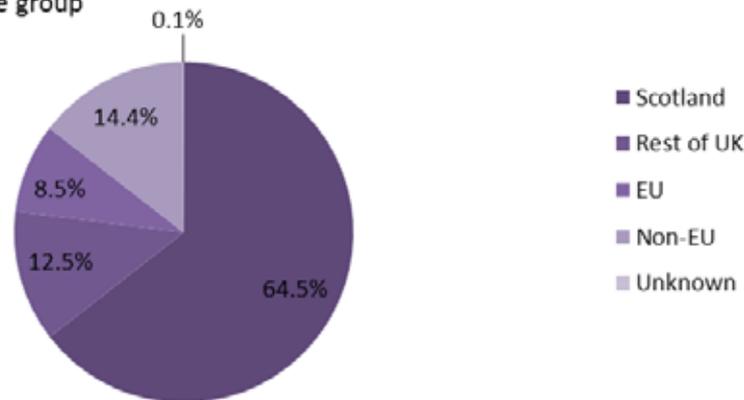
Table contains the following:
College- SFC funded FTEs
University- Scottish domiciled and SFC fundable FTEs

Demographic profile by domicile

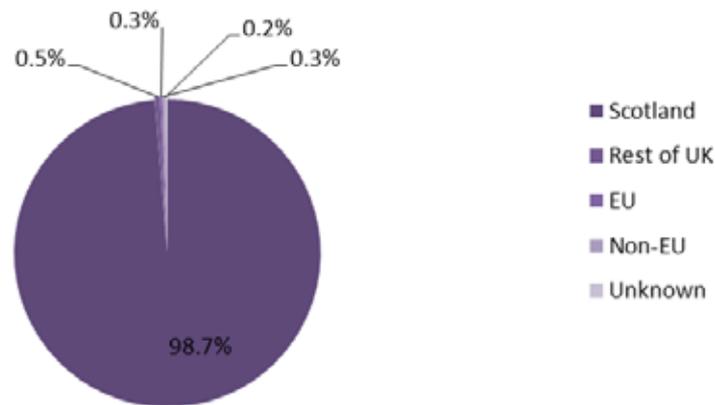
Scotland's colleges provide education to 265,000 students and universities provide education to 253,000 students. Most students at both universities and colleges are from Scotland. International and EU students make up just under 30% of students at university.

It is likely that post-Brexit and following the recent announcement of changes to funding EU students, the number of EU students may fall.

Proportion of Students at Scotland's Universities, 2018-19, by domicile group



Proportion of students in Scotland's Colleges, 2018-19, by domicile group



Theme 1 – Keeping the interests of current and future students and equalities at the heart of everything we do

93%

OF FULL TIME STUDENTS STUDYING ON FE COURSES WERE SATISFIED WITH THEIR COLLEGE EXPERIENCE

87%

OF FULL TIME STUDENTS STUDYING ON HE COURSES WERE SATISFIED WITH THEIR COLLEGE EXPERIENCE

85%

OF FULL TIME STUDENTS STUDYING AT UNIVERSITY WERE SATISFIED WITH THEIR EXPERIENCE

95%

OF PART TIME STUDENTS STUDYING ON FE COURSES WERE SATISFIED WITH THEIR COLLEGE EXPERIENCE

89%

OF PART TIME STUDENTS STUDYING ON HE COURSES WERE SATISFIED WITH THEIR COLLEGE EXPERIENCE

86%

OF PART TIME STUDENTS STUDYING AT UNIVERSITY WERE SATISFIED WITH THEIR EXPERIENCE

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.

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.

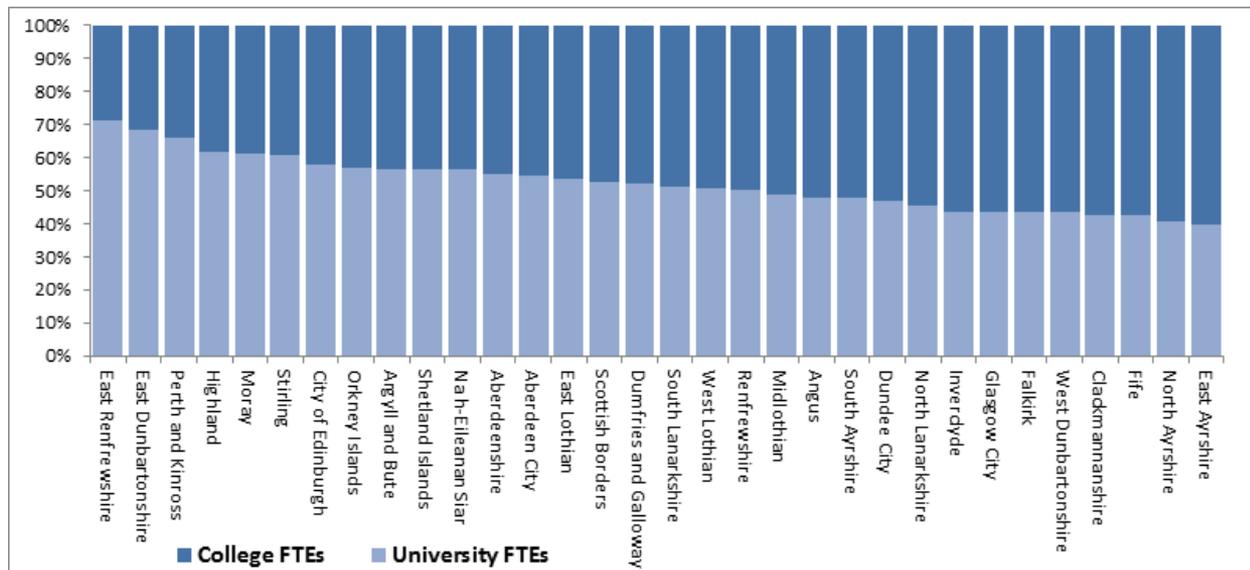


Scottish Funding Council
Comhairle Maoineachaidh na h-Alba

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%).



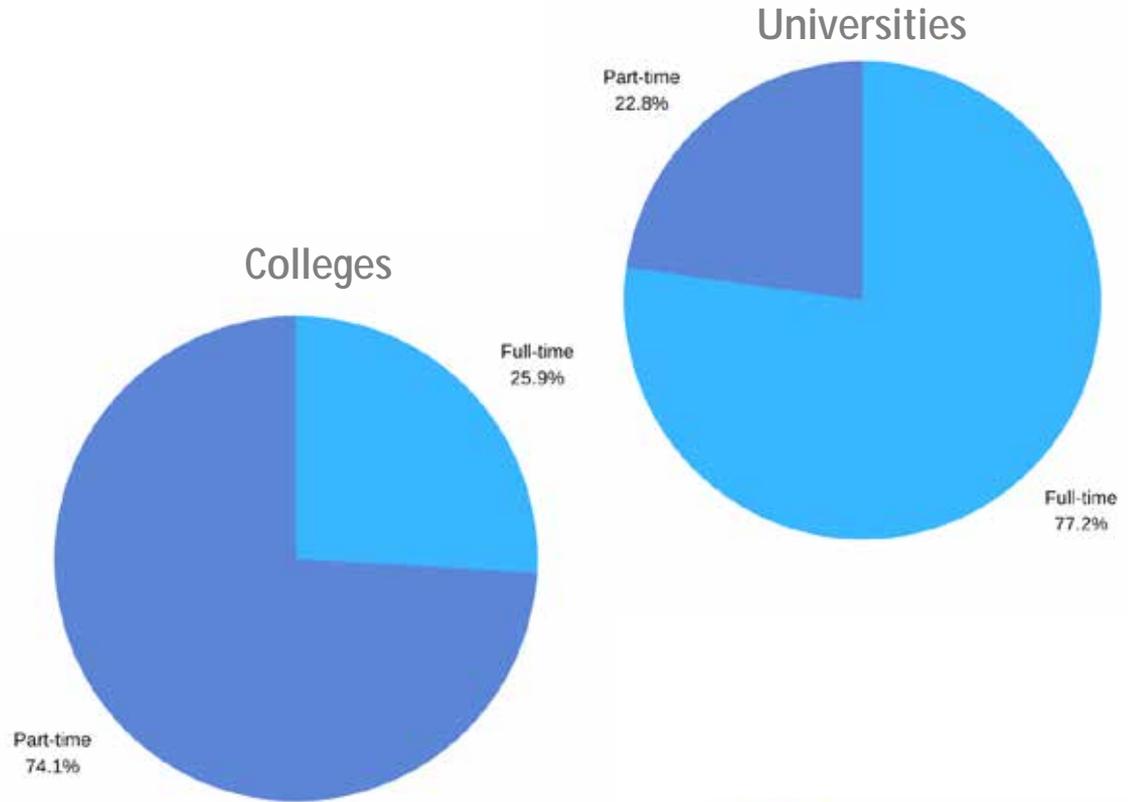
Theme 3 – Towards an integrated, connected tertiary education and skills eco-system

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.



Theme 4 –Recognising colleges and universities as national assets and civic anchors

£1.94bn

The net economic contribution from universities through the export of education, research and commercialisation equating to a 2.4% share of Scotland's exports.

£55,000

The estimated boost to productivity for the Scottish economy per college graduate

64,200

The number of people Scotland's colleges and universities employ.

£11

The amount of investment returned on every £1 of public investment into Scotland's universities.

£6.30

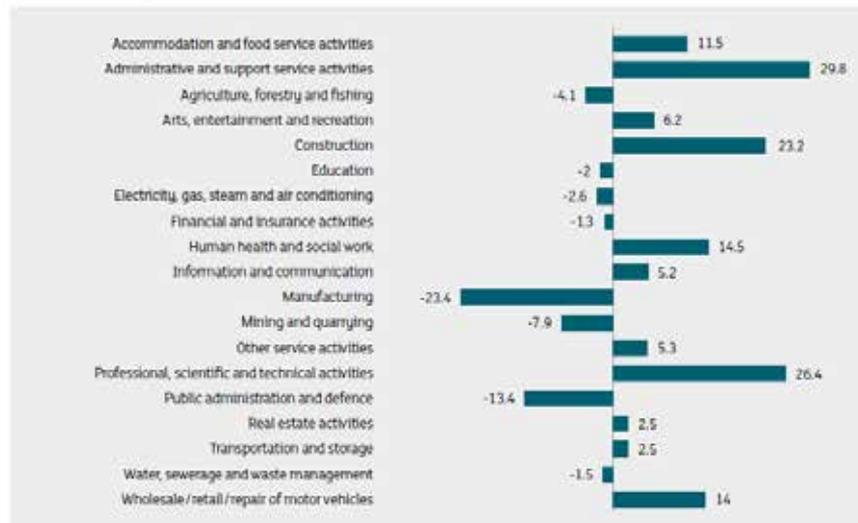
The amount of investment returned on every £1 of public investment into Scotland's colleges.

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



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

Source: Oxford Economics, 2017

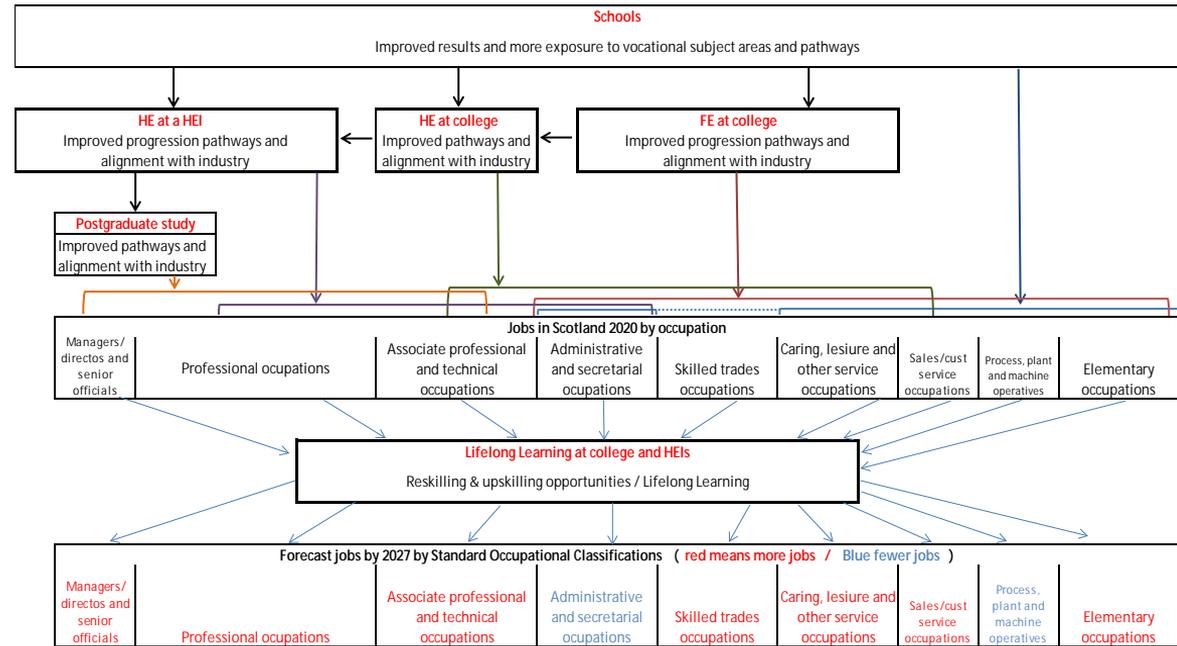
Occupation	2017	2027	Change	% Change
SOC 1 - Managers, directors and senior officials	223.2	227.5	4.3	2%
SOC 2 - Professional occupations	530.9	546.6	15.7	3%
SOC 3 - Associate professional and technical occupations	339.7	347.1	7.4	2%
SOC 4 - Administrative and secretarial occupations	263.5	263.2	-0.3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

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).

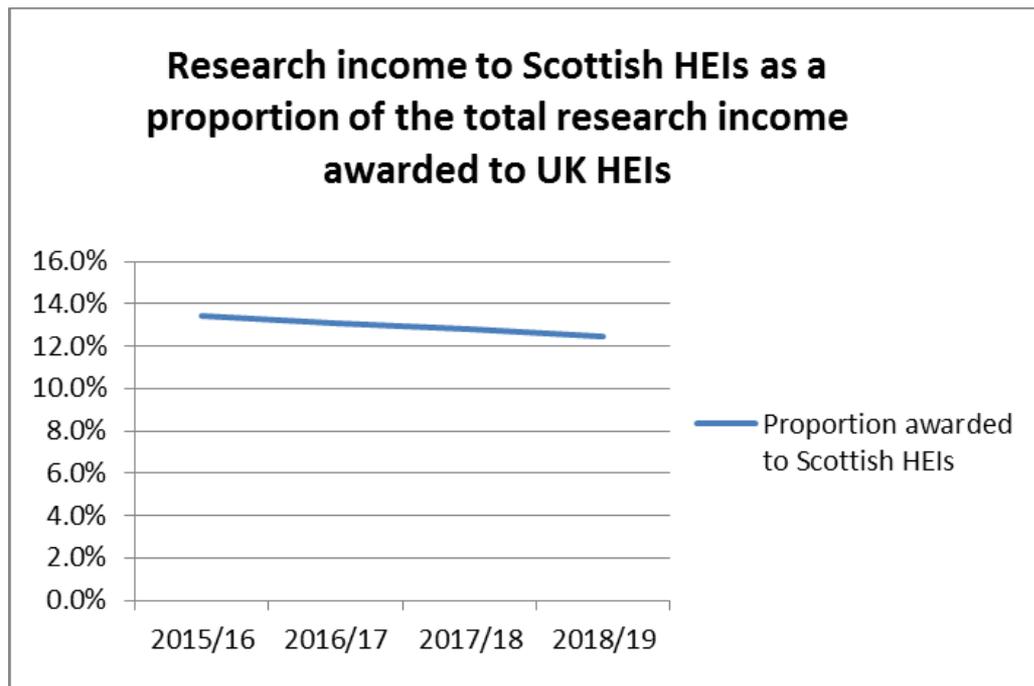
It also shows that future jobs in Scotland will change, requiring the workforce to adapt. In order to deliver a compatible workforce, colleges and universities will need to adapt their curriculum offer as well as offering lifelong learning opportunities for those needing to upskill or reskill.



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



Scotland's
research
strengths

Digital & Data
Science



Creative
Industries &
Gaming



Health & Life
Sciences



Robotics &
Space
Science



Optoelectronics,
Imaging, Lasers &
Sensors



Arts &
Culture

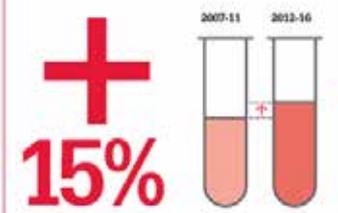


Advanced Manufacturing
& Materials

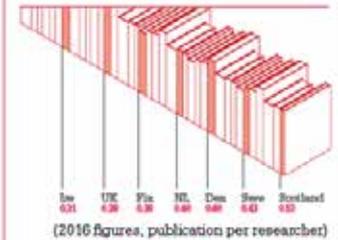


Scotland's Research Landscape 2007-16

Scotland's researchers are highly productive

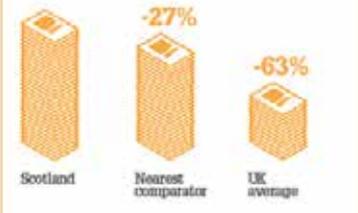



Scotland has increased its research output 15% between 2007-11 and 2012-16



Scotland's researchers are the most productive. Their productivity is consistently higher than the UK and all other comparator nations over the ten year period

Scotland's research is high quality

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 share of the world's top 1% most cited publications 1st of all UK nations 3rd out of all comparator countries

Scotland's researchers are highly mobile




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



57% of Scottish researchers are transitory (spending up to 2 years abroad)

These researchers have the highest impact out of all UK transitory researchers

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



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

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.

Theme 9 – Making the most of the sector's global connections



£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

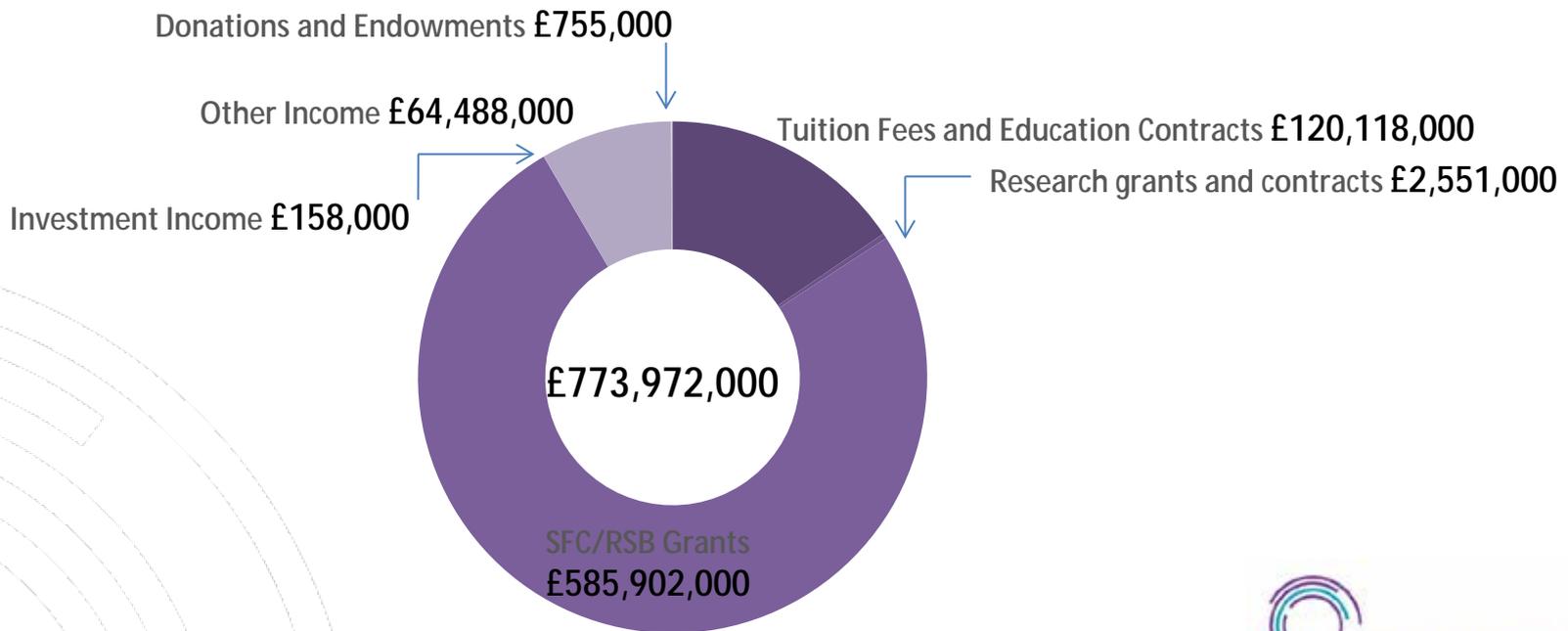
The number of world-leading innovation centres.

3

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

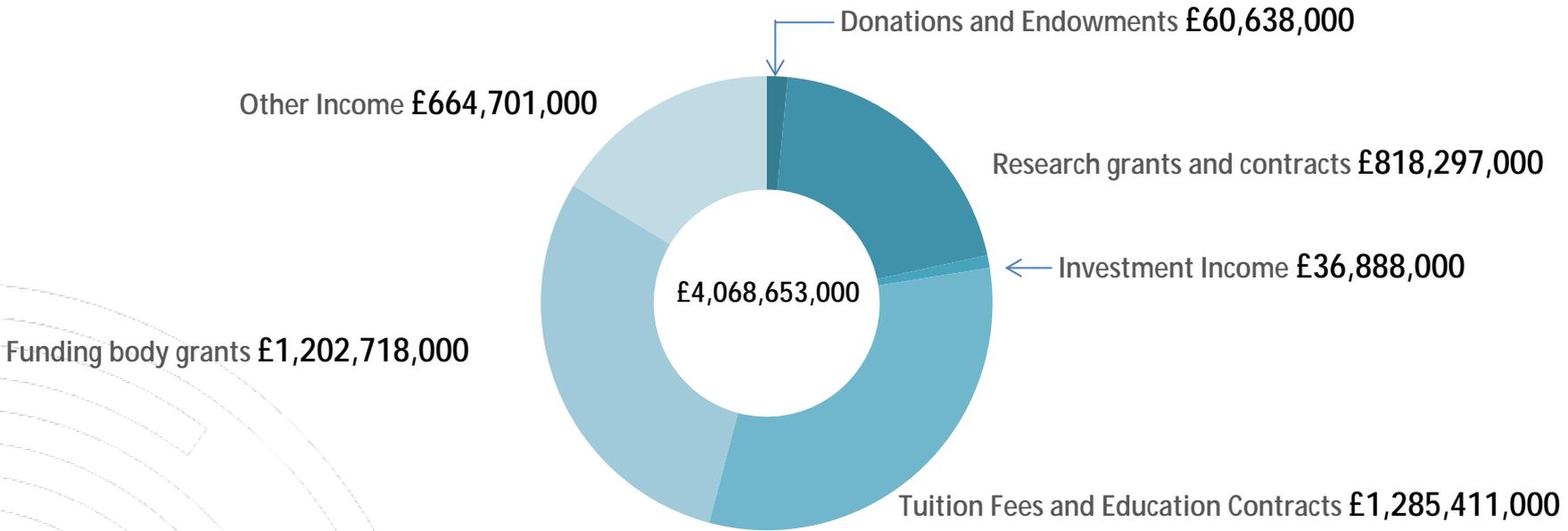
Theme 10 – Focusing on the financial sustainability of colleges and universities, both sectors and current funding models

Colleges Income 2018/19

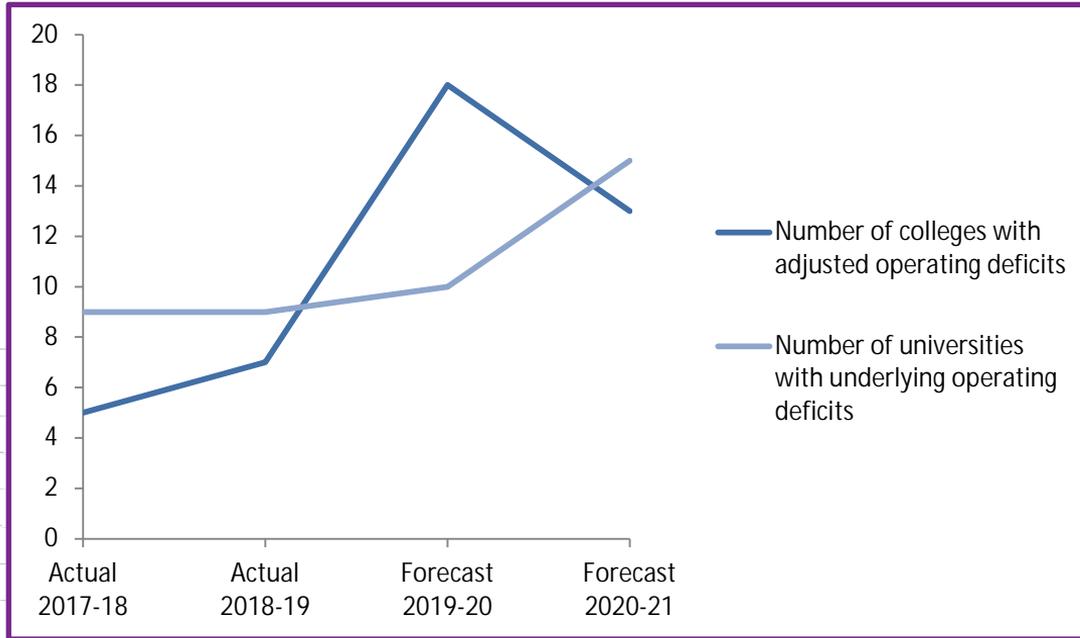


Theme 10 – Focusing on the financial sustainability of colleges and universities, both sectors and current funding models

Universities Income 2018/19



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

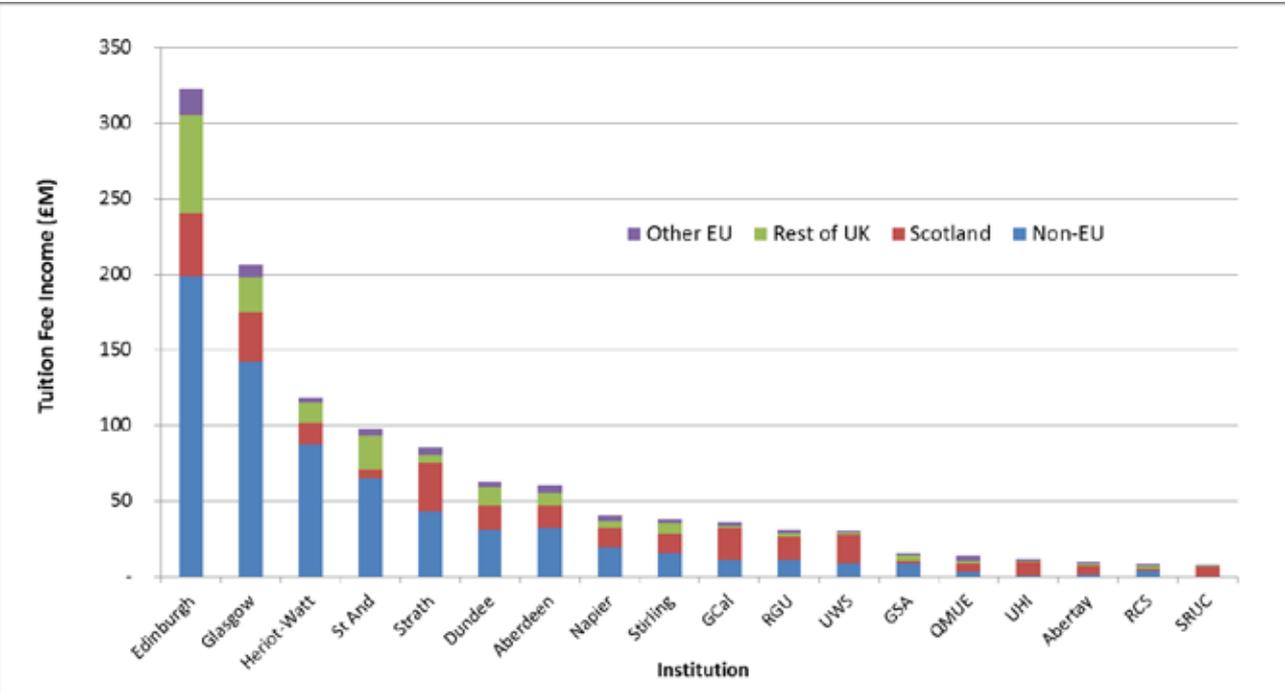


Financial Position of Colleges and Universities

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.