



Universities UK

Patterns of higher education institutions in the UK: Third report

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Universities UK

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A report by Professor Brian Ramsden to the Longer Term
Strategy Group of Universities UK

Foreword

This report is the third in a series commissioned by the Longer Term Strategy Group of Universities UK, with the support of the Standing Conference of Principals (SCOP).

The Group's intention is to produce a report of this kind annually, as a "yearbook" for higher education, updating previous information about higher education institutions generally while also addressing issues of immediate interest.

In this version, the author has been asked to address the issue of "differentiation". Last year's report concentrated on "diversity", i.e. the observable but essentially unplanned differences between institutions of higher education. In contrast "differentiation" refers to the conscious identification of many higher education institutions with named "groups".

As on previous occasions, there are some serious lessons here for those patient enough to read the data carefully.

For government, the report confirms the continued decline in the financial security of the sector and of institutions of all types within it. For the funding councils, it casts doubt on the wisdom of a strategy that seeks to typecast or constrain individual institutional missions according to prior assumptions about status. For representative bodies like Universities UK and SCOP, it should renew the focus on those developmental challenges that are genuinely UK-wide, while acknowledging those which can be heavily influenced by geography or sub-group membership. For the formal groups themselves, it throws up the interesting contrast with a so far unheralded non-aligned grouping, which contributes much to the mainstream of the sector's overall achievement, and on some indicators is at least as internally coherent as the recognised groups. Finally, for individual institutions, the challenge of adjusting to movement in student demand for mode and subject of study, as revealed in previous reports, is further reinforced.

As on previous occasions, Universities UK, SCOP, and the Longer Term Strategy Group, are deeply grateful to Professor Brian Ramsden for his scholarly and imaginative response to our requests for help in understanding what is really going on in UK higher education.



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September 2003

Preface

The principal aim of this report is to update and expand upon some of the issues explored in the previous two volumes of *Patterns in Higher Education Institutions in the UK*.

The first report (October 2001) provided a quantitative analysis of the shape of the higher education sector in the UK, examining trends over a five-year period from 1995. It documented the comparative size, financial security and spread of higher education institutions, taking into account geographical patterns and the international context. It also included some analysis of recent experience of collaboration and rationalisation within the sector.

The second report (September 2002) updated the first report to look at trends over a six-year period to 1999/2000, examining: enrolments by mode, level and subject; overseas students, EU and international; and subject coverage. It provided an analysis of diversity within the sector through the extent to which higher education institutions are differentiated against various measures, such as balance of provision, student characteristics, financial security, and costs and efficiency.

This third report is in three sections:

Section A: Trends in UK higher education, sets out some of the macro-level trends during the last seven years, and provides the context for findings about institutional patterns in the remainder of the report.

Section B: Patterns of differentiation, updates data provided in the earlier Patterns reports, and on this occasion addresses the concept of “differentiation” between groups of institutions.

Section C: Post-devolution issues, sets out some of the major differences that have emerged in the post-devolution context within the United Kingdom. As the post-devolution situation in Scotland, Wales and Northern Ireland (as well as England) develops, this is an area to which the Longer Term Strategy Group wishes to give increasing emphasis.

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A. Trends in UK higher education

1. This section of the report sets out some of the major trends during the last seven years, i.e. the period within which statistics about higher education institutions have been collected by the Higher Education Statistics Agency (HESA) on a broadly consistent basis throughout the UK.^{1 2}

Enrolments

2. Before looking at enrolments on higher education programmes, it should be noted that there is a small but growing percentage of students in higher education institutions who are following programmes at further education (FE) level. Table 1 shows the current figures and comparisons with 1994/95 and 1999/2000.

Table 1: Enrolments in HEIs by country on HE and FE programmes, 1994/95 to 2000/01

		United Kingdom	England	Wales	Scotland	Northern Ireland
1994/95	Total all students	1601118	1333308	81986	149165	36659
	Total FE students	33805	31126	1861	257	561
	% of total	2.1%	2.3%	2.3%	0.2%	1.5%
1999/2000	Total all students	1918970	1598170	104030	173670	43110
	Total FE students	62640	57560	4940	150	0
	% of total	3.3%	3.6%	4.7%	0.1%	0.0%
2000/01	Total all students	2094110	1753325	114025	180440	46320
	Total FE students	103485	96625	6725	135	0
	% of total	4.9%	5.5%	5.9%	0.1%	0.0%
HE percentage change 1994/95 to 2000/01		31%	32%	39%	21%	26%
HE percentage change 1999/2000 to 2000/01		9%	10%	10%	4%	7%
FE percentage change 1994/95 to 2000/01		206%	210%	261%	-47%	-100%
FE percentage change 1999/2000 to 2000/01		65%	68%	36%	-10%	

¹ Virtually all of the statistical information within this report has been drawn from HESA publications: in particular it draws on the CD-Rom publications "HE Finance Plus" and "HE Planning Plus", and also the Higher Education Management Statistics at institutional level and the volume of Resources of Higher Education Institutions. The presentation of figures within the tables conforms to HESA's conventions for the year in question: for example, numbers for the year 2000/01 are rounded to the nearest five. All HESA publications are published by the Higher Education Statistics Agency Limited, 95 Promenade, Cheltenham, GL50 1HZ, telephone 01242 255577; further details are available at <http://www.hesa.ac.uk/products/pubs/home.htm>.

² The data in this report relates to the academic/financial year 2000/01. While most of the data for 2001/02 is available at the time of publication of this report, some items are not yet analysed. As in previous Patterns reports, it has been decided to present a consistent picture at the end of 2000/01 rather than including a mixture of data across years.

3. It should be noted here that the apparent growth in the numbers and proportion of students following FE programmes in England and Wales (in which it is exclusively concentrated) arises partly because of the incorporation of former FE institutions within a small number of higher education institutions, and partly from a data definitional change adopted by HESA, in consultation with the UK education departments and funding bodies. This change to the definition of the standard population, introduced in 2000/01 and used in analysis by HESA, involves counting more students following short courses. It is believed to be a better way of capturing the totality of provision within higher education institutions.
4. In summary, 1 in 20 of students in higher education institutions are reported as studying at FE level, compared with 1 in 50 seven years ago.
5. Registrations on programmes at FE level are excluded from the further analyses within this report.
6. Turning now to higher education student enrolments, Table 2 shows enrolments at undergraduate and postgraduate level, by UK country and by mode of study in the most recent year, with comparisons with 1994/95 and 1999/2000.

Table 2: Enrolments by mode and level, 1994/95 to 2000/01

			United Kingdom	England	Wales	Scotland	Northern Ireland
1994/95	PG	Full-time	129711	106110	6742	14116	2743
		Part-time	205614	171982	7669	19738	6225
		Total	335325	278092	14411	33854	8968
	UG	Full-time	946919	764359	55054	104448	23058
		Part-time	285069	259731	10660	10606	4072
		Total	1231988	1024090	65714	115054	27130
All students		Full-time	1076630	870469	61796	118564	25801
		Part-time	490683	431713	18329	30344	10297
		Total	1567313	1302182	80125	148908	36098
		<i>Percentage PG</i>	21.40%	21.40%	18.00%	22.70%	24.80%
1999/2000	PG	Full-time	151330	125490	7340	15120	3380
		Part-time	257290	216800	11020	23410	6070
		Total	408620	342290	18360	38530	9450
	UG	Full-time	1027400	830430	58640	113430	24910
		Part-time	420310	367900	22090	21570	8760
		Total	1447710	1198330	80730	135000	33670
All students		Full-time	1178730	955920	65980	128550	28290
		Part-time	677600	584700	33110	44980	14830
		Total	1856330	1540620	99090	173530	43120
		<i>Percentage PG</i>	22.00%	22.20%	18.50%	22.20%	21.90%
2000/01	PG	Full-time	172285	144475	7830	16020	3960
		Part-time	276410	233330	11925	24735	6415
		Total	448695	377805	19755	40755	10375
	UG	Full-time	1037880	839675	58015	114260	25935
		Part-time	504045	439220	29530	25290	10010
		Total	1541925	1278895	87545	139550	35945
All students		Full-time	1210165	984150	65845	130280	29895
		Part-time	780455	672550	41455	50025	16425
		Total	1990620	1656700	107300	180305	46320
		<i>Percentage PG</i>	22.54%	22.80%	18.41%	22.60%	22.40%

7. The change over time in these enrolment statistics is summarised in Table 2A.

Table 2A: Overall change in enrolments by mode and level, 1994/95 to 2000/01

	United Kingdom	England	Wales	Scotland	Northern Ireland
% change in numbers of PGs, 1994/95 to 2000/01	33.8%	35.9%	37.1%	20.4%	15.7%
% change in numbers of PGs, 1999/2000 to 2000/01	9.8%	10.4%	7.6%	5.8%	9.8%
% change in numbers of UGs, 1994/95 to 2000/01	25.2%	24.9%	33.2%	21.3%	32.5%
% change in numbers of UGs, 1999/2000 to 2000/01	6.5%	6.7%	8.4%	3.4%	6.8%
Change in part-time numbers					
% change in numbers of part-time PGs, 1994/95 to 2000/01	34.4%	35.7%	55.5%	25.3%	3.1%
% change in numbers of part-time PGs, 1999/2000 to 2000/01	7.4%	7.6%	8.2%	5.7%	5.7%
% change in numbers of part-time UGs, 1994/95 to 2000/01	76.8%	69.1%	177.0%	138.4%	145.8%
% change in numbers of Part-time UGs, 1999/2000 to 2000/01	19.9%	19.4%	33.7%	17.2%	14.3%
Change in full-time numbers					
% change in numbers of full-time PGs, 1994/95 to 2000/01	32.8%	36.2%	16.1%	13.5%	44.4%
% change in numbers of full-time PGs, 1999/2000 to 2000/01	13.8%	15.1%	6.7%	6.0%	17.2%
% change in numbers of full-time UGs, 1994/95 to 2000/01	9.61%	9.85%	5.38%	9.39%	12.48%
% change in numbers of full-time UGs, 1999/2000 to 2000/01	1.02%	1.11%	-1.07%	0.73%	4.11%

8. Overall, there is an increase in enrolments over the seven year period of 27%.
9. Differentiated by level, the increase has been 34% at postgraduate level and 25% at undergraduate level. The increase is marked at postgraduate level in England and Wales, and at undergraduate level in Wales and Northern Ireland.
10. When the figures are disaggregated by mode, there is a noticeably greater increase in part-time students than full-time at both undergraduate and postgraduate levels. While a significant proportion of the growth in part-time undergraduates can be attributed to a structural cause (the mainstreaming of the former Continuing Education courses in the pre-1992 universities in 1994/95) there is in fact a generally greater increase across the whole of the period in part-time enrolments as compared with full-time. However, again it is important to take into account the re-definition of the HESA standard population, which reports greater numbers following short part-time courses: this has had a major effect on the year to year shift between 1999/2000 and 2000/01.
11. In summary, an overall increase of 27% in the last seven years masks the fact that there have been greater increases in the number of postgraduates compared with undergraduates, and in part-time students compared with full-time.

International students

12. A major feature of the development of higher education in the UK during the last seven years has been a growth in the number of international students (see Table 3).
13. This growth has been greater than the growth in UK student numbers. This trend should be considered separately in relation to European Union (EU) and non-EU international students, because of the different structural and financial implications.

Table 3: International students enrolments

		Student numbers	% of total
1994/95	UK	1403600	89.6%
	EU	65716	4.2%
	International	97997	6.3%
	All	1567313	100.0%
1999/2000	UK	1631670	87.9%
	EU	102510	5.5%
	International	122150	6.6%
	All	1856330	100.0%
2000/01	UK	1759755	88.4%
	EU	94575	4.8%
	International	136290	6.8%
	All	1990620	100.0%
Percentage change 1994/95 to 2000/01	UK	25.37%	
	EU	43.91%	
	International	38.68%	
	All	27.01%	
Percentage change 1994/95 to 2000/0, adjusted to take account of changed EU membership	UK	25.37%	
	EU	32.80%	
	International	42.69%	
	All	27.01%	
Percentage change 1999/2000 to 2000/01	UK	7.85%	
	EU	-7.74%	
	International	11.58%	
	All	7.23%	

14. On 1 January 1995, Austria, Finland and Sweden joined the EU. Since then, the numbers of students from those three countries attending UK higher education institutions has risen by more than 200%. The table therefore shows the percentage change in EU and other student numbers adjusted to take account of this movement.
15. Overall, the growth in international numbers over the seven year period has been significantly greater than the growth in home students. In the most recent year, an apparent reduction in the numbers of EU-domiciled students is again distorted by changes in the HESA definitions, under which, from 2000/01, visiting and incoming exchange students from overseas countries have been excluded from student populations. This has had a significant, but unquantifiable, effect on the populations of students from France, Austria, Germany and Spain, all of which show negative movements as compared with the previous year.
16. The growth in students from non-EU countries continues to be strong.

Enrolments by subject

17. This report now turns to subject trends. Table 4 shows the absolute and relative enrolments in each subject area in 1994/95 and 2000/01: figures include all students, irrespective of level, mode or domicile.

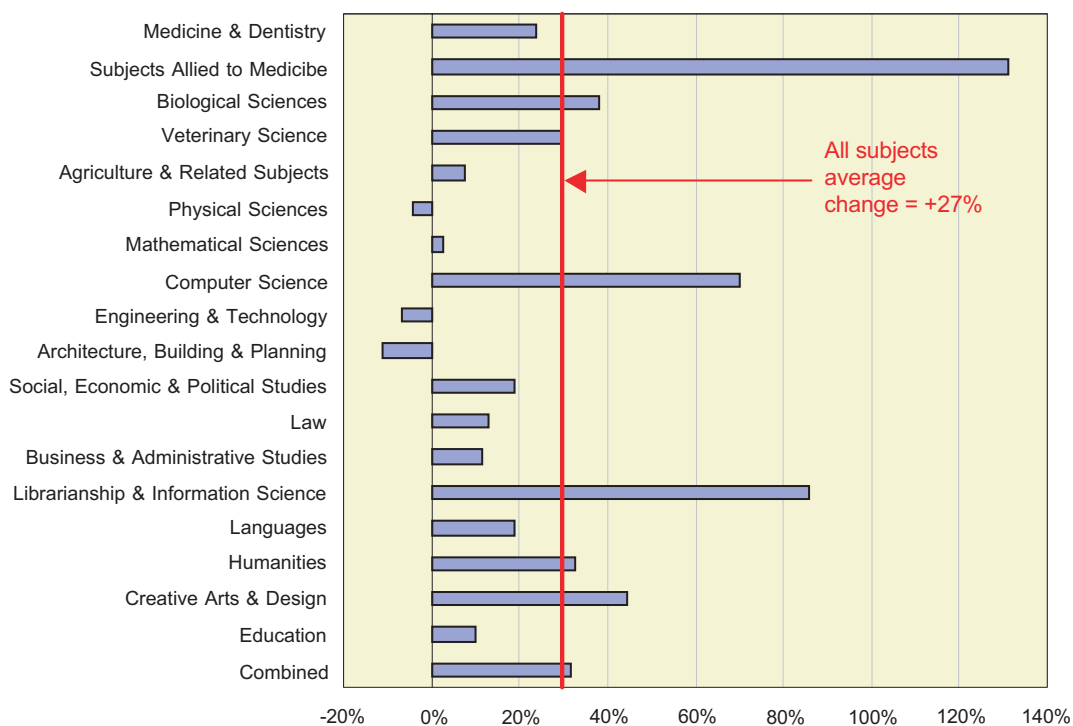
Table 4: Enrolments by subject area

	1994/95		2000/01	
	Student numbers	Percentage of total	Student numbers	Percentage of total
Medicine & Dentistry	37,207	2.40%	46,145	2.3%
Subjects Allied to Medicine	100,947	6.40%	233,320	11.7%
Biological Sciences	67,767	4.30%	93,730	4.7%
Veterinary Science	2,939	0.20%	3,815	0.2%
Agriculture & Related Subjects	14,509	0.90%	15,625	0.8%
Physical Sciences	72,511	4.60%	69,285	3.5%
Mathematical Sciences	19,978	1.30%	20,520	1.0%
Computer Science	64,918	4.10%	110,400	5.5%
Engineering & Technology	139,334	8.90%	129,925	6.5%
Architecture, Building & Planning	49,394	3.20%	44,000	2.2%
Social, Economic & Political Studies	119,343	7.60%	141,665	7.1%
Law	53,347	3.40%	60,160	3.0%
Business & Administrative Studies	213,359	13.60%	237,615	11.9%
Librarianship & Information Science	15,495	1.00%	28,795	1.4%
Languages	81,150	5.20%	96,335	4.8%
Humanities	48,747	3.10%	64,590	3.2%
Creative Arts & Design	74,708	4.80%	107,895	5.4%
Education	135,430	8.60%	149,275	7.5%
Combined	256,230	16.30%	337,540	17.0%
All Subjects	1,567,313	100.00%	1,990,625	100.0%

18. It should be noted that the large increase in the numbers of students following subjects allied to medicine (predominantly nursing) has an obvious (compensatory negative) effect on the proportions of the sector made up by the other subject areas.

19. The percentage change in the numbers within each subject area is therefore illustrated in Chart 1.

Chart 1: Percentage change in student numbers by subject area, 1994/95 to 2000/01



20. Above average increases in student numbers are seen in subjects allied to medicine, biological sciences, computer science, librarianship and information science, humanities, creative arts and design and the combined subject area.³
21. On the other hand, there has been a reduction in absolute student numbers within architecture, building and planning, engineering and technology and the physical sciences. In the previous Patterns report, it was noted that education had also seen an absolute reduction in student numbers between 1994/95 and 1999/2000. That situation has now been reversed, with a significant increase in 2000/01, especially at postgraduate level.
22. This simple analysis by broad subject group however does not do full justice to the very significant shifts in emphasis in higher education courses during the seven years under investigation. It is necessary to consider the detailed principal subject⁴ of the students in order to assess the changes which have taken place.
23. The numbers of students following individual subjects as their main qualification aim in each of the years 1994/95, 1999/2000 and 2000/01 are set out in Appendix 1.

³ Note that the Combined subject area is heavily influenced by the fact that the students of the Open University are returned within this subject area.

⁴ We are looking here at the principal subject of qualification aim, as identified by HESA.

24. From this more detailed analysis, it can be observed that:

- Enrolments within **medicine and dentistry** have risen by 24%, slightly less than the average of 27% across all subjects: changes in the structure of clinical degrees prevent any more detailed analysis.
- The 131% increase in the number of students following **subjects allied to medicine** is largely a product of the shift of funding of nursing courses into the higher education sector, but the accompanying substantial rise in enrolments in pharmacy (63%), audiology (over 600% though from a low base), ophthalmics (54%) and medical technology (167%) should not be overlooked.
- The 38% increase in **biological sciences** conceals a reduction in enrolments in biology and is accounted for largely by the increase in psychology enrolments and in “other biological sciences”.
- There has been an increase in enrolments in **veterinary science** 30%, slightly higher than the average.
- Within the **physical sciences** area, chemistry has seen a reduction of 16%, physics a reduction of 8% and environmental sciences a reduction of 10%: these have been partially offset by a small percentage increases in physical geography, and significant increases in oceanography, astronomy and archaeology.
- Students studying **mathematical sciences** have increased by only 9%, and those studying statistics have decreased by 22%.
- There has been a 70% increase in the number of students studying **computer science**.
- On the other hand, enrolments in the **engineering and technology** subject area have decreased by 7%, with significant absolute reductions in student numbers in electrical engineering, civil engineering, chemical engineering, production engineering and polymers and textiles. Biotechnology also shows a downward trend. Only aeronautical engineering has shown a significant increase in student numbers over the seven year period.
- Within the **architecture, building & planning** area, enrolments in architecture have increased by 19%, but this rise is more than offset by significant reductions in the numbers of students following courses in building (-23%) and in town and country planning (-20%).
- Most aspects of **social, economic & political studies** have seen double figure percentage increases, although below the average of all subjects. Social work and sociology report above average increases, although reductions are noted for politics (-3%) and social policy and administration (-6%).
- There has been an 13% increase in enrolments in **law**.
- The **business & administrative studies** subject area has seen a below average increase in student numbers (11%). This masks a reduction in accountancy (-8%), which is offset somewhat by an increase in financial management (26%, which is almost at the average of all subjects), and a 5% reduction in enrolments in catering and

hospitality. Major growth areas have been marketing and market research (+68%) and industrial relations (+51%), at the expenses of business and management studies (+8%) and land and property management (-27%).

- The area of **librarianship and information science** shows an overall increase of 86% and within it media studies shows a very large increase with a rise of 192%. Journalism increases by 153%, though from a low base, and librarianship by 74%, from a lower base.
 - The **languages** area shows a below average increase overall (19%) with reductions in relation to most foreign languages (French -2%, German -11%). Spanish languages however show an increase of 78%. In absolute terms, however, it is English which has shown the major rise, of some 8000 students (30%).
 - The **humanities** show an above average increase of 33%, within which history increases by 25%, history of art by 65%, philosophy by 34%, theology by 31% and archaeology by 123%.
 - **Creative arts and design** subjects also show a significant increase (44% overall) with increases above 60% in music and in drama, over 200% in cinematics (from a low base), and 31% in both fine art and design studies.
 - There is a 10% increase overall in **education** although teacher training still shows a decrease (13%, compared with 16% last year). This is offset by significant increases in physical education (49%), techniques in teaching adults (57%) and education for those with special needs (94%) and management and organisation of education (87%). It is likely to be the case that the changes in these figures since the last Patterns report are influenced by the changes in HESA definitions between 1999/2000 and 2000/01.
25. In summary, there have been significant shifts of emphasis in the subjects being followed by higher education students during the last seven years, and, as has been reported in the earlier Patterns reports, some of these are perhaps counter-intuitive. Large increases have been seen in aspects of humanities, such as archaeology and the history of art, in music and fine art, in Spanish languages, and in education for those with special needs, as well as computer science, media studies and design studies. These increases have occurred alongside a significant real terms reduction in some other significant subjects, such as accountancy and several aspects of the physical sciences and engineering, and also a proportional reduction in some other major subjects, such as business and management and aspects of mathematical sciences.
26. These subject shifts represent a major change in the nature of higher education in the institutions of the United Kingdom.

Subject coverage

27. This section considers the spread of teaching provision throughout the UK as represented by the numbers of institutions teaching specific subjects.
28. The Patterns report of 2001 suggested that there was little correlation between the number of students studying a subject nationally and the number of institutions which made provision for this subject as a “principal subject of qualification aim”, and that was confirmed in the analysis in Patterns 2002. As a consequence, the average population of subjects within

institutions varied widely. It was suggested that the resources associated with the teaching of particular subjects lay behind this: for example, at one extreme, the costs of teaching medicine necessitated a concentration of provision.

29. It will therefore be interesting to consider whether the trends in subject enrolments have affected the numbers of institutions making provision for those subjects. The data is published for the five year period from 1996/97 to 2000/01. The following table sets out the numbers of institutions making teaching provision in 1996/97 and 2000/01 for individual subjects which have more than 12,000 enrolments in the most recent year.

Table 5: Numbers of institutions making provision for the teaching of major subjects

	1996/97			2000/01			% change in number of institutions teaching the subject		% change in students per institution
	Number of students, 1996/97	Number of institutions, 1996/97	students per institution	Number of students, 2000/01	Number of institutions, 2000/01	students per institution	% change in students	% change in institutions	
Nursing	93980	90	1044	152357	90	1693	62%	0%	62%
Business and management studies	135428	124	1092	144922	129	1123	7%	4%	3%
Computing science	73612	120	613	110399	117	944	50%	-3%	54%
Law	54767	92	595	60159	93	647	10%	1%	9%
Teacher training	62692	86	729	58491	96	609	-7%	12%	-16%
Design studies	40672	81	502	47332	83	570	16%	2%	14%
Medicine	35197	66	533	38733	59	656	10%	-11%	23%
Academic studies in education	31261	105	298	37019	105	353	18%	0%	18%
English	29455	106	278	34833	113	308	18%	7%	11%
Social work	26833	112	240	31594	104	304	18%	-7%	27%
Psychology (not solely as social science)	25120	88	285	31043	96	323	24%	9%	13%
History	26885	104	259	28859	107	270	7%	3%	4%
Electronic engineering	22055	94	235	26361	95	277	20%	1%	18%
Sociology	21798	107	204	26101	115	227	20%	7%	11%
Accountancy	23791	79	301	23119	80	289	-3%	1%	-4%
Economics	22098	90	246	23012	88	262	4%	-2%	6%
Biology	23962	101	237	22308	106	210	-7%	5%	-11%
Mechanical engineering	21900	86	255	21707	84	258	-1%	-2%	1%
Chemistry	22679	88	258	19661	84	234	-13%	-5%	-9%
Other biological sciences	12285	89	138	19261	99	195	57%	11%	41%
Building	20097	56	359	17905	57	314	-11%	2%	-13%
General engineering	16679	84	199	17453	86	203	5%	2%	2%
Mathematics	16051	102	157	17376	98	177	8%	-4%	13%
Other topics in education	16477	77	214	17158	81	212	4%	5%	-1%
Politics	17234	87	198	17097	92	186	-1%	6%	-6%
Marketing and market research	11880	65	183	16928	79	214	42%	22%	17%
Fine art	13883	72	193	16476	78	211	19%	8%	9%
Catering & institutional management	18110	56	323	16186	63	257	-11%	13%	-20%
Music	12511	78	160	15909	83	192	27%	6%	20%
Civil engineering	18272	72	254	15422	70	220	-16%	-3%	-13%
Architecture	12800	42	305	13945	52	268	9%	24%	-12%
Media studies	6888	47	147	13605	66	206	98%	40%	40%
Drama	10037	72	139	13525	82	165	35%	14%	19%
Techniques in teaching adults	10336	59	175	13521	63	215	31%	7%	23%
Balanced combination within languages	14058	77	183	12966	84	154	-8%	9%	-16%
Physics	14366	75	192	12905	67	193	-10%	-11%	0%
Industrial relations	10353	71	146	12862	73	176	24%	3%	21%

30. Medicine, social work, mathematics, and computing have seen a reduction in the number of institutions teaching the subject, alongside an increase in total student numbers.
31. On the other hand, teacher training, biology, building, environmental sciences and catering & institutional management have seen the converse scenario, i.e. a reduction in the numbers of students alongside an increase in the number of providers.
32. Industrial relations, English, media studies, music, drama, history, psychology and sociology have all seen increases in total student numbers, with increases also in the number of providers.
33. Chemistry and civil engineering have seen reductions in both the number of students and in the number of providers.
34. While there are some obvious changes in emphasis, (e.g. expansion of provision in the humanities and creative arts) there is little evidence here to suggest that the number of providers has changed as the demand from students has changed over the last five years. In the majority of subjects within this table, the number of providers appears to have increased, while the number of students has either decreased or not increased in line with the average increase in overall student numbers.

B. Patterns of differentiation

35. The first Patterns report looked at the sector as whole over the period since the 1991 White Paper *Higher Education: A New Framework*⁵ was published, and in particular focused on consolidation within the sector.
36. The second Patterns report focused on “diversity” within the sector, i.e. the unconscious variety of activities and provision among the institutions of higher education.
37. This third report focuses on the concept of “differentiation”, i.e. the conscious positioning of institutions within the higher education sector.
38. As before, the report addresses three main themes:
 - Balance of provision
 - Student characteristics and outcomes
 - Financial issues
39. Also, as before, these themes will be illustrated by showing graphs which chart the distribution across all of the institutions in the higher education sector, but on this occasion, in the light of work undertaken for the Longer Term Strategy Group of Universities UK, particular attention will be given to the self-declared groupings of institutions, plus the representative group of the higher education colleges, as follows:
 - The Coalition of Modern Universities (CMU)
 - The 1994 Group
 - The Russell Group
 - The Standing Conference of Principals (SCOP)
40. The characteristics of these four groups are broadly as follows:
 - *CMU*
The Coalition of Modern Universities Group (CMU) consists of 34 institutions in England, Scotland and Wales. (One institution has recently merged from two former CMU institutions,

and therefore the data elsewhere in this report refers to 35 institutions.) Overall CMU institutions account for 30% of the student full-time equivalents (FTEs) in higher education institutions and 19% of the income received by the sector. The average size of CMU group institutions is 13000 student FTEs, (ranging from 4100 to 24900) and their average annual income is £72 million.

- *1994 Group*

The 1994 Group consists of 17 institutions in England and Scotland. Overall they account for 9.5% of the student FTEs in higher education institutions and 11.5% of the income received by the sector. (Two members of the 1994 Group are also members of the Russell Group, so there is some double counting here.) The average size of 1994 group institutions is 8200 student FTEs, (ranging from 5600 to 14000) and their average annual income is £91 million.

- *The Russell Group*

The Russell Group is composed of 19 universities, all of which have a research focus, and most of which have medical schools. Overall they account for 21% of the student FTEs in higher education institutions and 37% of the income received by the sector. (Two members of the Russell Group are also members of the 1994 Group, and so there is some double-counting here.) The average size of Russell Group institutions is 16200 student FTEs (ranging from 6400 to 22000) and the average annual income is £260 million.

- *SCOP*

SCOP represents 34 non-university institutions in England (and also has three associate members drawn from the private sector). Because of transfers of institutions into and out of the sector, data is available for 31 of the current members of SCOP. Overall they account for 7.5% of the student FTEs in higher education institutions and 4.7% of the income received by the sector. The average size of SCOP institutions is 3500 FTEs (ranging from 400 to 9000) and the average annual income is £20 million.

41. In addition to these consciously-generated groups, there are several institutions which are not aligned to any of these groups. These fall into two categories. On the one hand there are specialist institutions which are not in membership of any grouping. These include the music conservatoires, some specialist medical institutions and others. The range of their activities and the significant differences in their funding régimes make it difficult to include them in the broad analysis which follows.

The “non-aligned” group

42. There is also a large number of general institutions which are not associated with any of the groupings identified above. They include both pre-1992 and post-1992 universities. In the light of discussion among members of the Longer Term Strategy Group, it has been decided to include these institutions within this analysis, as “non-aligned”.
43. There are 38 such institutions.
44. The report therefore addresses differentiation among and between five institutional groupings. The institutions within each of these five groupings included in this analysis are listed in Appendix 3.

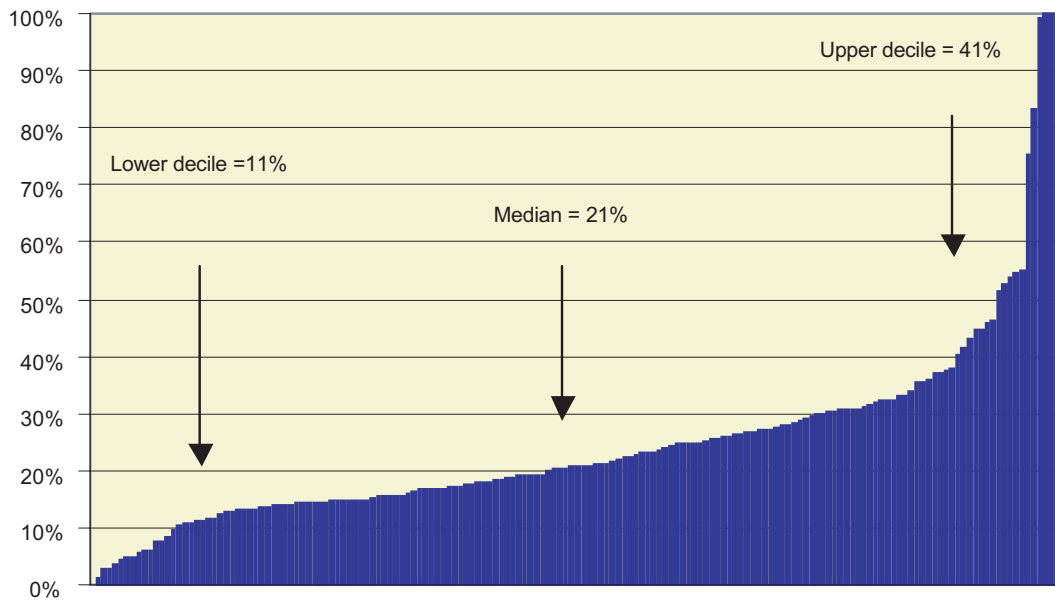
Number of institutions in the sector

45. Before looking at the balance of provision in higher education, it should be noted that, since the publication of the previous Patterns report, the constitution of the sector has changed slightly.
46. The earlier reports noted that a number of mergers had taken place within the sector since 1994/95. The common pattern for institutional mergers in recent years, as the previous Patterns reports have noted, has been the absorption of specialist colleges into the pre-1992 universities. In this most recent year for which data is completely available (2000/01) only two of the four mergers were of that kind: one post-1992 university and one college of higher education are identified as receiving institutions.
47. Appendix 2 sets out the mergers which have taken place, or which are imminent within higher education at the time of writing. Additionally, some further merger discussions are taking place across the higher education/further education boundary.
48. Overall, the absorption of specialist and general colleges into (chiefly) pre-1992 universities during the last seven years inevitably has had an effect on the overall balance of provision within the relevant parts of the sector, and has also affected the statistics of the receiving institutions.
49. In the most recent year, the four mergers have been slightly offset by the fact that one constituent college of the University of London is now reported as a separate institution. In total, the number of institutions reported within this report has therefore reduced by three, to 165. This compares with 184 institutions in the higher education sector in 1994/95; despite the significant number of institutions entering the higher education sector over this period, there are in total 19 fewer institutions in the sector as a whole – a reduction of 10%.

Balance of provision

50. The balance of provision within higher education institutions is considered in respect of four aspects:
 - the balance of provision at different levels of study;
 - the balance between full-time and part-time provision;
 - the balance between UK, EU and international students;
 - the balance of provision by subject.
51. Chart 2 analyses the balance by level of study (the percentage of students following postgraduate programmes).

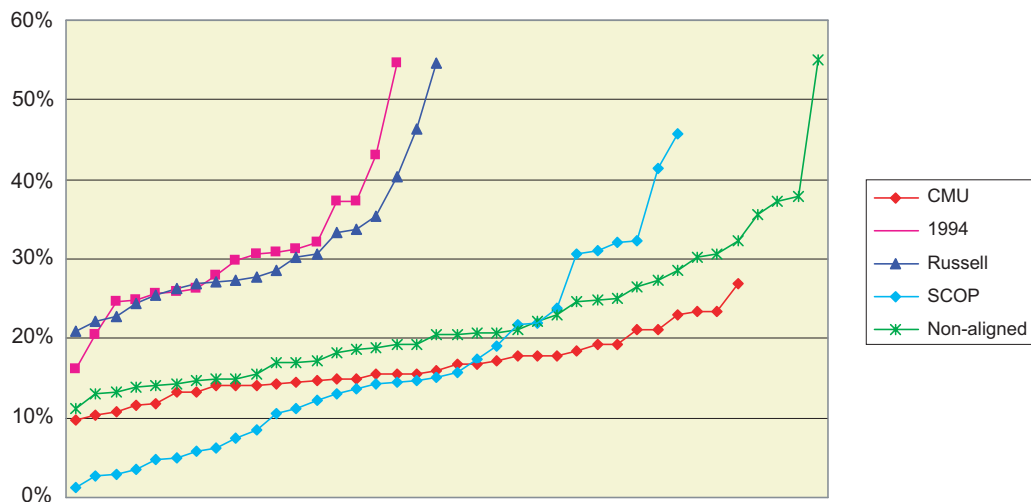
Chart 2: Percentage of students following postgraduate programmes, 2000/01



52. Change since 1998/99: This chart should not be directly compared with the equivalent ones published in the earlier Patterns reports because of a change of methodology. There is in fact a small reduction in the median and upper quartiles.

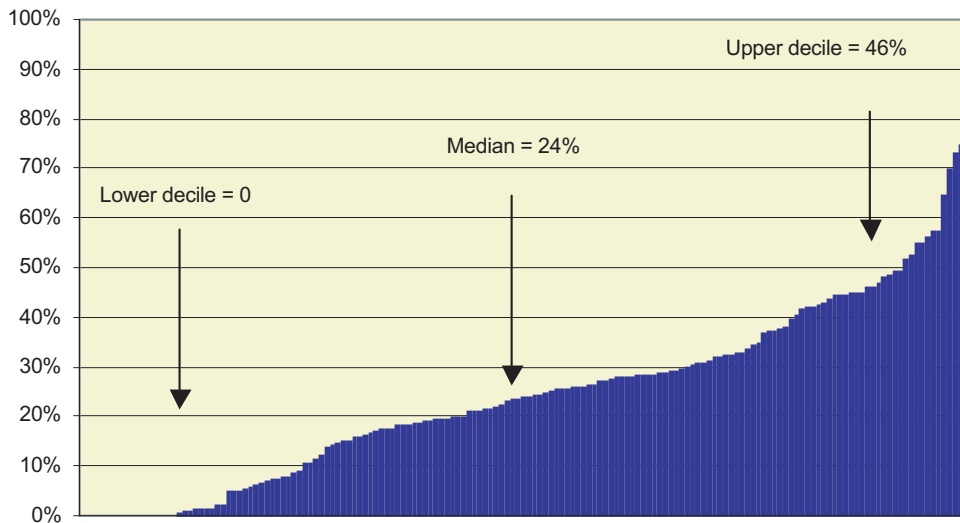
53. Differentiation: Chart 2A shows the patterns within the five institutional groupings.

Chart 2A: Percentage of postgraduate students by institutional grouping, 2000/01



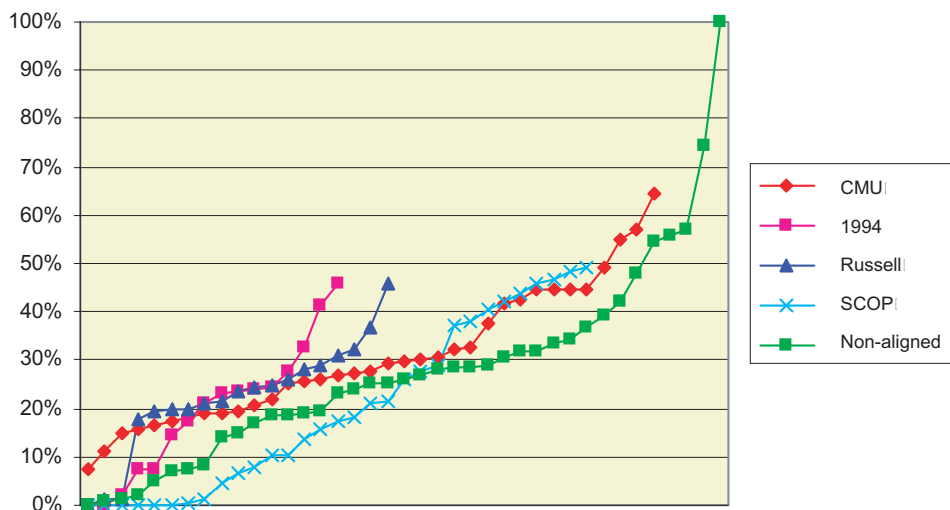
54. The Russell Group and the 1994 Group show very similar profiles. The SCOP institutions are, predictably, divided into two segments, with the higher group being predominantly specialist education providers. The non-aligned group show some consistency, except for a few outliers, as do the CMU grouping.

Chart 3: Percentage of students following undergraduate programmes not directly leading to degrees, 2000/01



- 55. Change since 1998/99: median up 8%; upper decile up 13%; lower decile unchanged. There has been a significant increase during the last two years in the proportion of students following programmes not leading directly to a degree.
- 56. Differentiation: Chart 3A shows the patterns within the five institutional groupings.

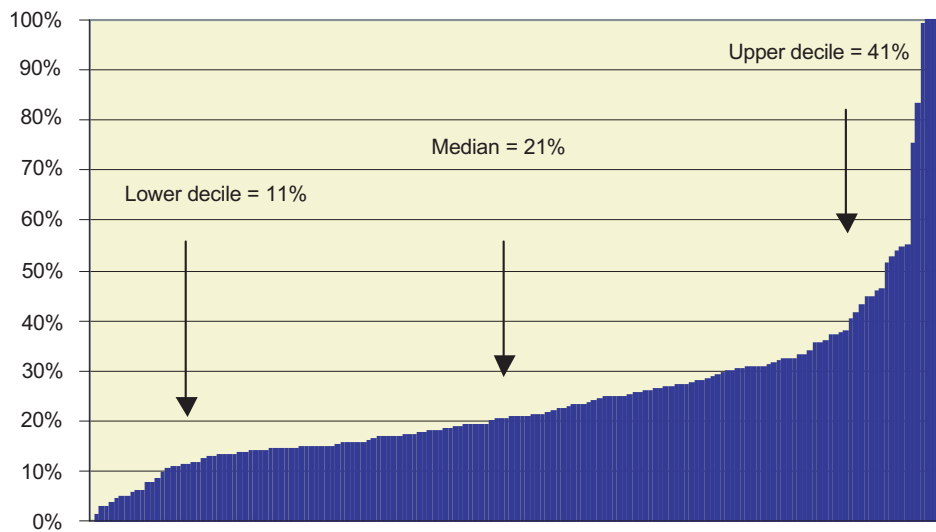
Chart 3A: Percentage of students following undergraduate programmes not directly leading to degrees by institutional grouping, 2000/01



- 57. What is perhaps most interesting here is not so much the differentiation within the sector as the lack of it, with all five groups showing a similar profile. It should be noted, however, that the nature of the non-degree courses varies as between universities, with the CMU group showing a greater proportion of students following full-time courses, while the non-degree courses in the other groups tend to be predominantly part-time.

58. Turning now to the balance between full-time and part-time enrolments generally, Chart 4 analyses the balance by mode of study.

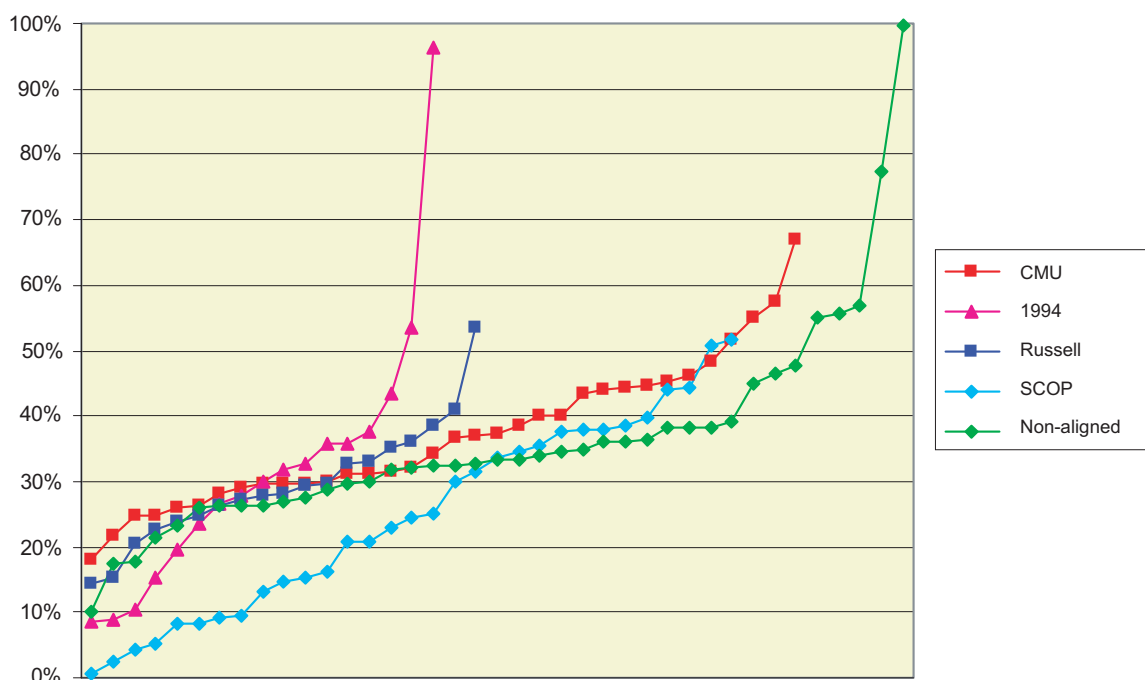
Chart 4: Percentage of students following part-time programmes, 2000/01



59. Change since 1998/99: Median up 3%; upper decile up 7%; lower decile up 2%. However, the figures should be treated with caution in view of new definitions: as the earlier Patterns reports noted, there are different categories of part-time student, including those on undergraduate degree programmes, those on postgraduate programmes, and students following courses of personal and professional updating.

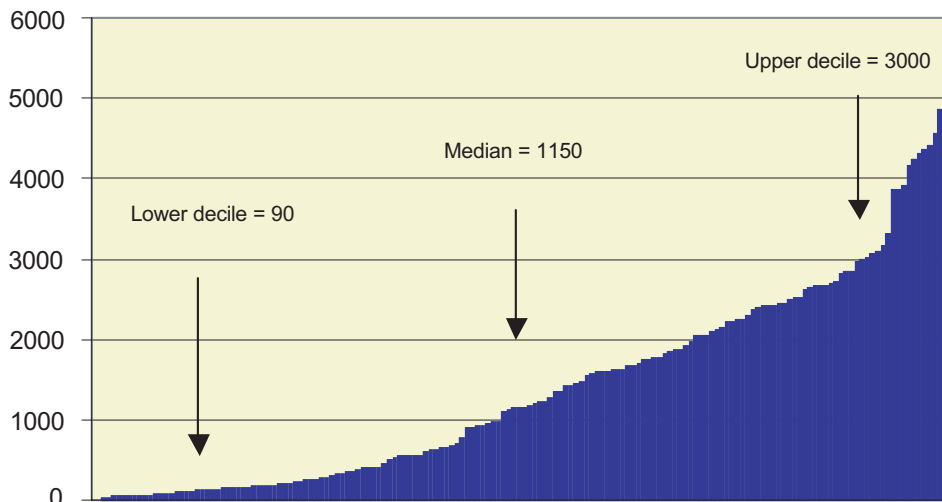
60. Differentiation: Chart 4A shows the patterns within the five institutional groupings.

Chart 4A: Percentage of students following part-time programmes, by institutional grouping, 2000/01



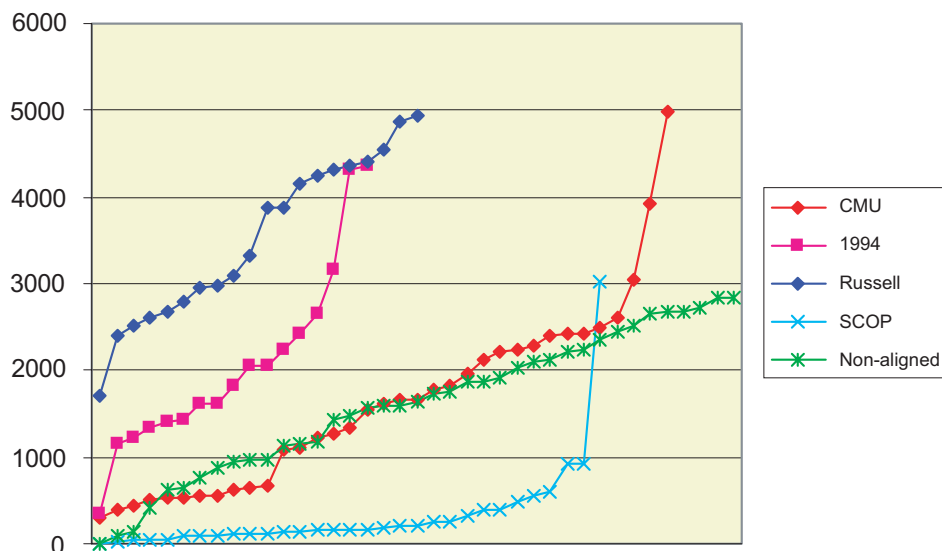
61. While there are obvious outliers within some groupings (because there are two institutions which make provision predominantly for part-time students) there is again a consistent pattern here, with the Russell Group and 1994 Group following similar tracks, while the CMU and non-aligned groups follow another one. SCOP institutions again fall into two groups.
62. As the earlier section of this report identified, the growth in numbers of students from overseas has significantly out-stripped the growth in home students during the last six years. This report now looks at the institutional distribution of these students. The following chart shows the numbers of international students enrolled on programmes of study in United Kingdom higher education institutions.

Chart 5: Absolute numbers of international students, 2000/01



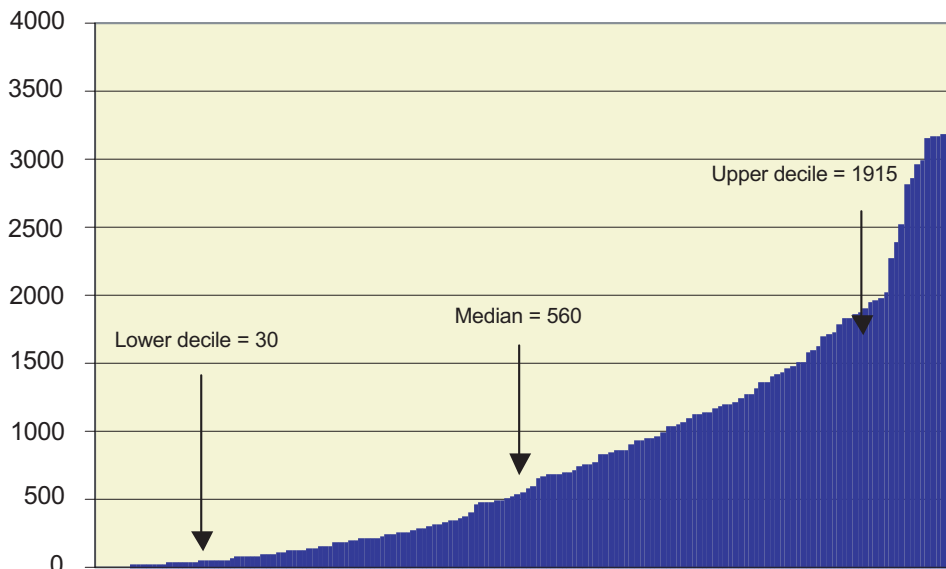
63. Change since 1998/99: median up 79; upper decile up 120; lower decile up 24. The change is not significant.
64. Differentiation: Chart 5A shows the patterns within the five institutional groupings.

Chart 5A: Absolute numbers of international students by institutional grouping, 2000/01



- 65. Generally, the CMU and non-aligned groups track a very similar path. With one exception, the SCOP group show lower participation by international students than other groupings. The Russell Group show the highest number of international students, with the majority showing a larger number of international students than institutions in the other groupings.
- 66. This picture is seen more clearly in relation to students from outside the EU (see Chart 6).

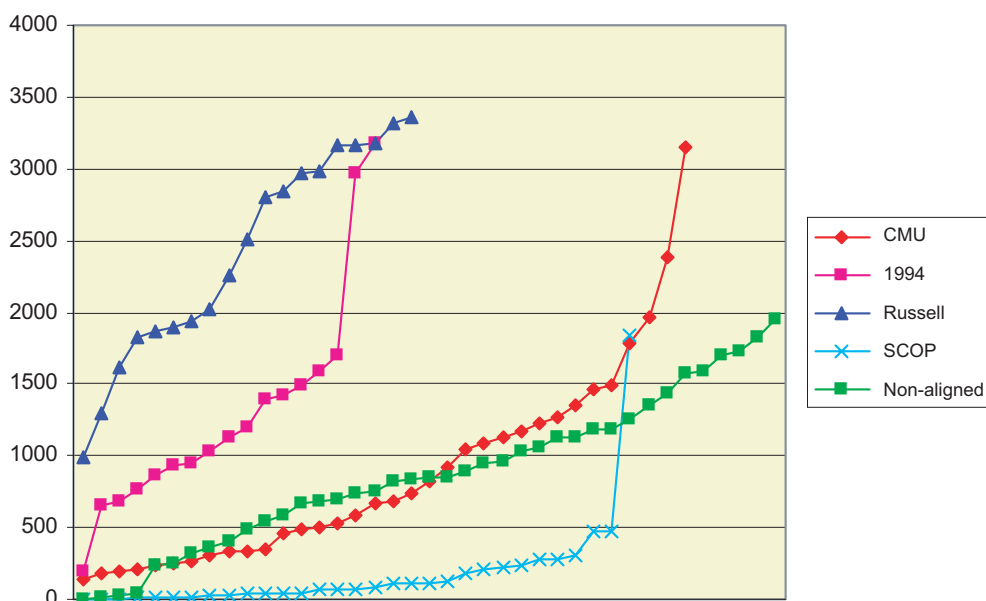
Chart 6: Students from outside the EU, 2000/01



- 67. Change since 1998/99: median up 63 (12.6%); upper decile up 236 (14.1%); lower decile down 4. Those institutions which recruit students from non-EU countries have seen a significant increase over the last two years.

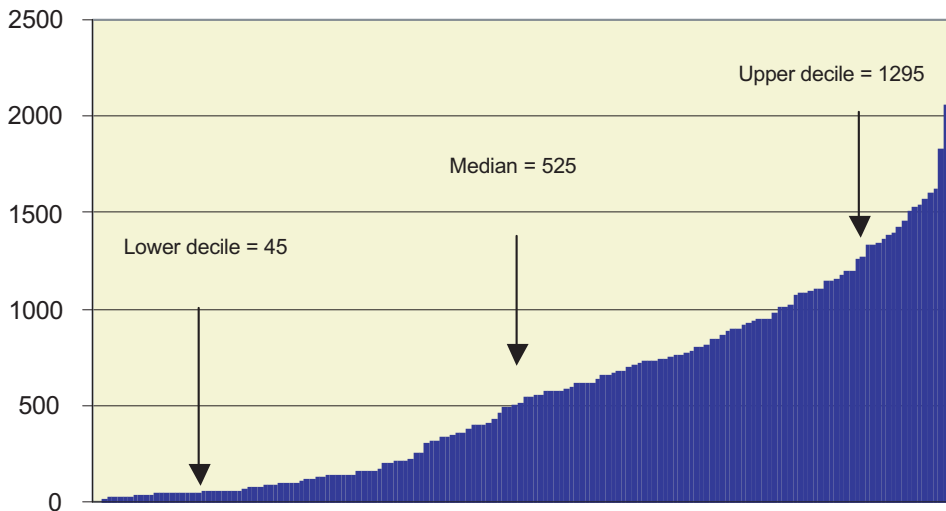
- 68. Differentiation: Chart 6A shows the patterns within the five institutional groupings.

Chart 6A: Students from outside the EU by institutional grouping, 2000/01



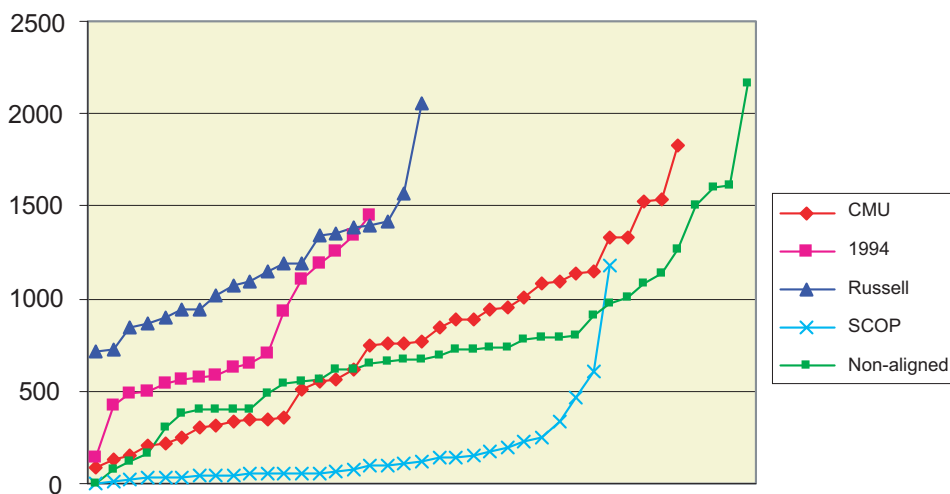
69. The Russell Group clearly dominates this chart, with a majority of its members having more than 2000 international students. The 1994 Group shows a complex situation. The CMU and non-aligned groupings follow a very similar track.
70. However, in relation to EU-domiciled students, a different picture is presented. Chart 7 shows the spread of enrolments of non-UK EU-domiciled students.

Chart 7: EU domiciled international students, 2000/01



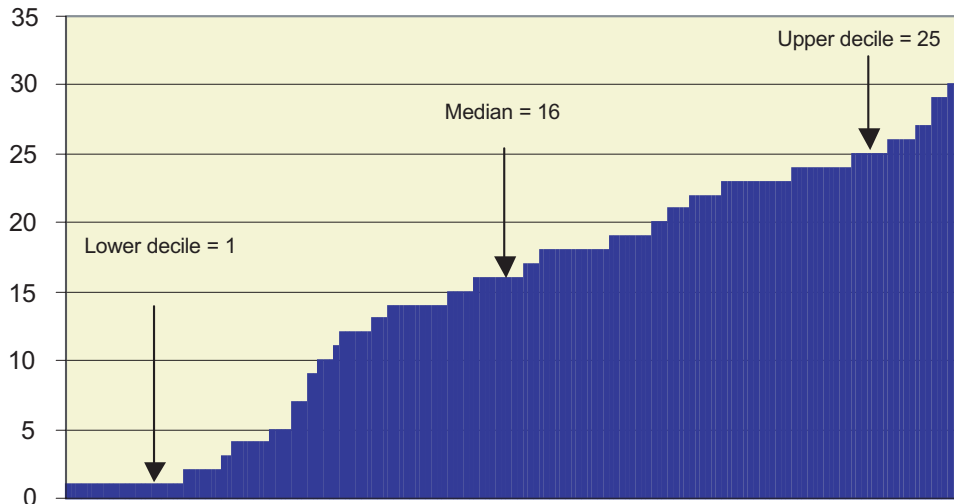
71. Change since 1998/99: median down 25; upper decile up 3; lower decile down 2. No significant change.
72. Differentiation: Chart 7A shows the patterns within the five institutional groupings.

Chart 7A: EU domiciled international students by institutional grouping, 2000/01



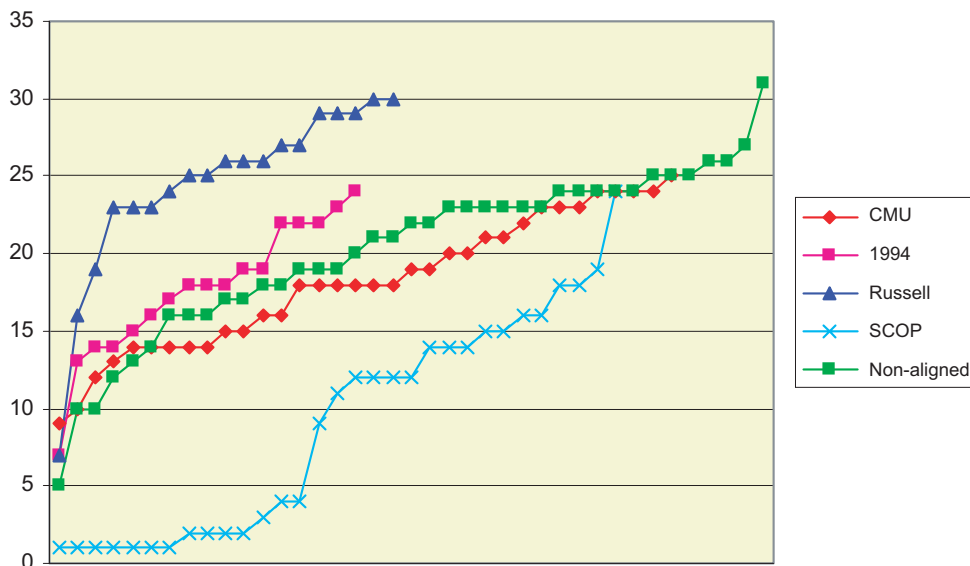
73. Turning now to a more general aspect of provision, and one which is relevant to both teaching and research, the previous Patterns reports included an analysis of the number of academic cost centres within which institutions were undertaking teaching and research. This analysis is updated in Chart 8.

Chart 8: Number of cost centres within which staff are employed, 2000/01



74. **Change since 1998/99:** median up 1; upper decile; no change; lower decile; no change.
75. **Differentiation:** Chart 8A shows the patterns within the five institutional groupings.

Chart 8A: Number of cost centres within which staff are employed by institutional grouping, 2000/01

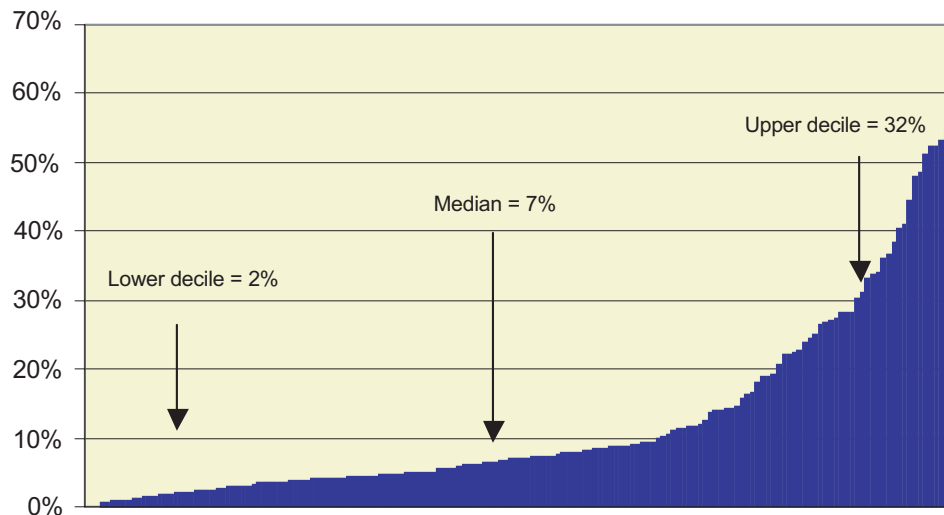


76. A majority of institutions in the Russell Group and the non-aligned group are teaching in more than 20 cost centres. The 1994 and CMU groups are more specialised (though certainly in different discipline areas); while the SCOP institutions, as might be expected, are divided between the specialist and non-specialist colleges.

Student characteristics and outcomes

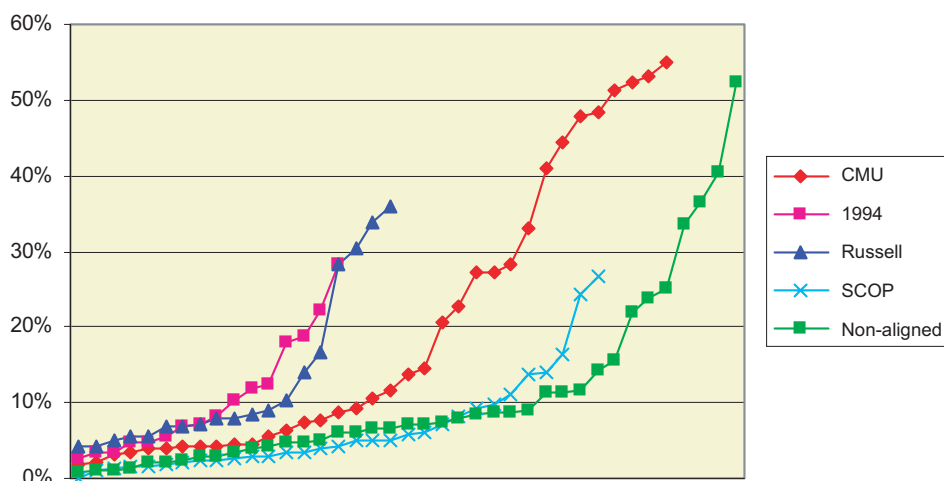
77. The following section of this report addresses some aspects of student characteristics and outcomes within higher education institutions.
78. Chart 9 shows the percentage of UK entrants who are reported as coming from ethnic minority groups.

Chart 9: Percentage of UK-domiciled students coming from ethnic minority groups, 2000/01



79. Change since 1998/99: median unchanged; upper decile up 3%; lower decile down 1%. The first Patterns report observed that there is a very significant concentration of ethnic minority students, and that this is largely related to geography: this concentration appears to be increasing over time.
80. Differentiation: Chart 9A shows the patterns within the five institutional groupings.

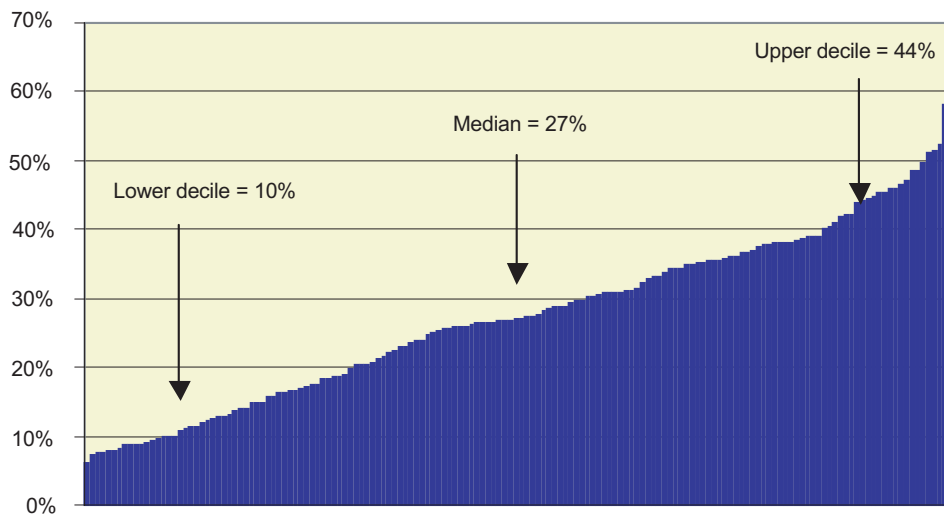
Chart 9A: Percentage of UK-domiciled students coming from ethnic minority groups by institutional grouping, 2000/01



81. The CMU group dominate the chart, with approximately half of the institutions having more than 20% ethnic minority students. The non-aligned group also includes institutions with a high proportion of ethnic minority students.

82. Previous Patterns reports have drawn attention to the significance of mature student enrolments in UK higher education. The percentage of full-time mature undergraduates is shown in Chart 10.

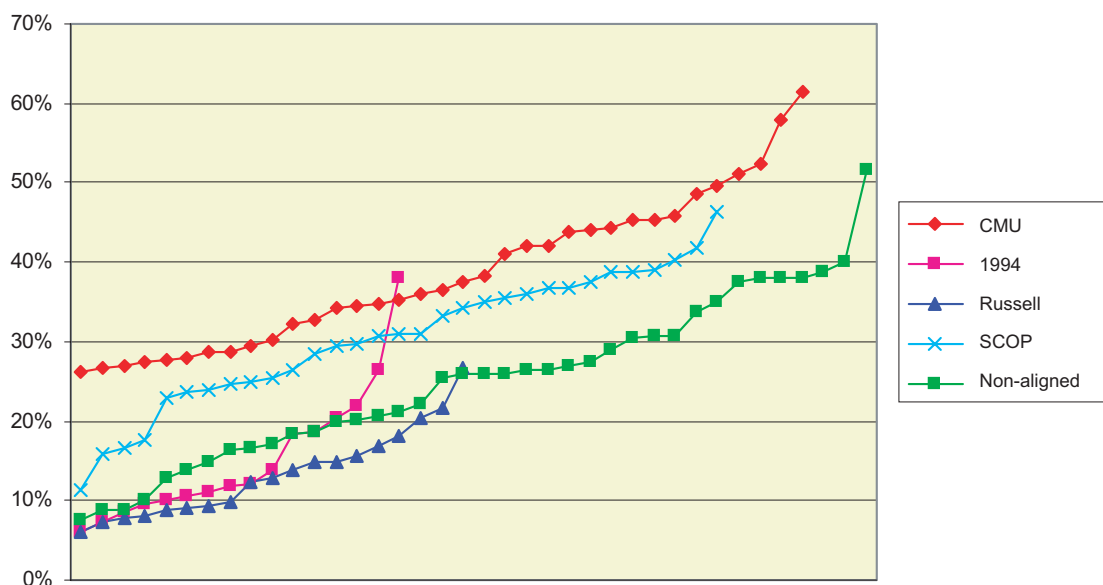
Chart 10: Percentage of mature full-time undergraduates, 2000/01



83. Change since 1998/99: median down 4%; upper decile down 1%; lower decile down 5%. Overall, there is a noticeable reduction in the proportion of mature students.

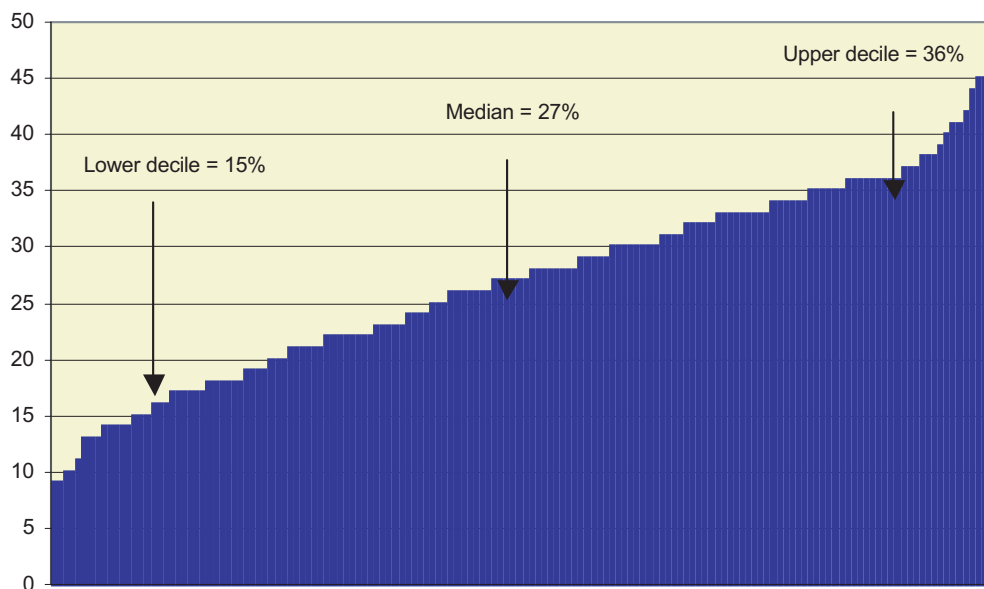
84. Differentiation: Chart 10A shows the patterns within the five institutional groupings.

Chart 10A: Percentage of mature full-time undergraduates by institutional grouping, 2000/01



85. The Patterns reports of 2001 and 2002 included some analysis of the participation of students from under-represented groups, as identified within the funding councils' performance indicators. Two such measures were used: firstly the percentage of young full-time first degree entrants from social classes IIIM, IV and V; and secondly the percentage coming from "low participation neighbourhoods", as identified by HEFCE. The report noted that there was a close correlation between the institutional ranking on each of these measures (while not assuming that the measures themselves closely correlated).
86. It was also noted that there was a correlation between social class and non-traditional entrants to full-time undergraduate courses (again, at institutional level).
87. This data is updated in Charts 11 and 12.

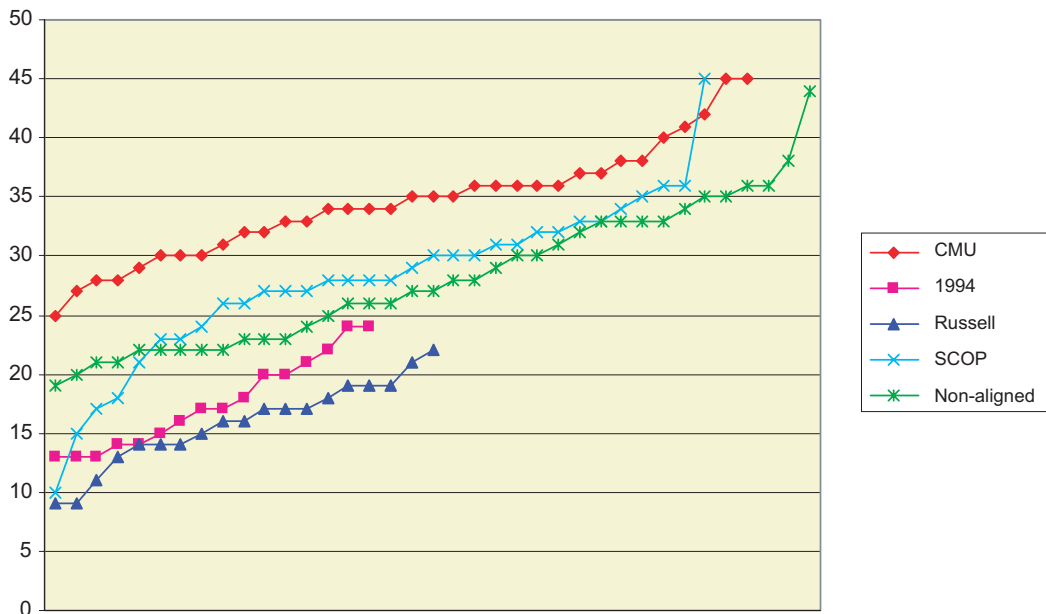
Chart 11: Percentage of young full-time undergraduates from social classes IIIM, IV and V, 2000/01



88. Change since 1998/99: median down 1%; upper decile down 3%; lower decile unchanged.

89. Differentiation: Chart 11A shows the patterns within the five institutional groupings.

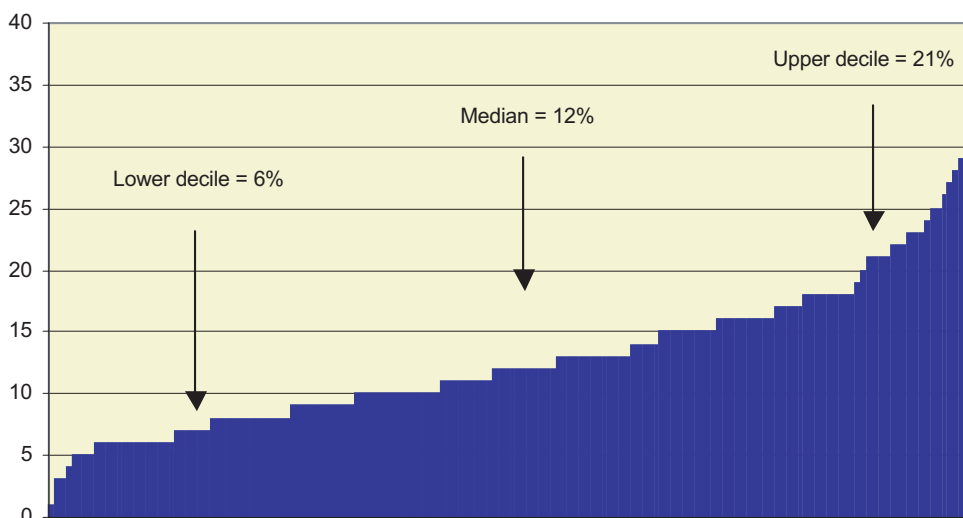
Chart 11A: Percentage of young full-time undergraduates from social classes IIIM, IV and V by institutional grouping, 2000/01



90. The CMU, SCOP and non-aligned groups all show a majority of institutions having more than 25% of their students coming from the lower socio-economic groups. The Russell and 1994 Groups have broadly similar profiles, with none having more than 25% of their students coming from the lower socio-economic groups.

91. Chart 12 shows the distribution of students from low participation neighbourhoods, drawing on the HEFCE performance indicators.

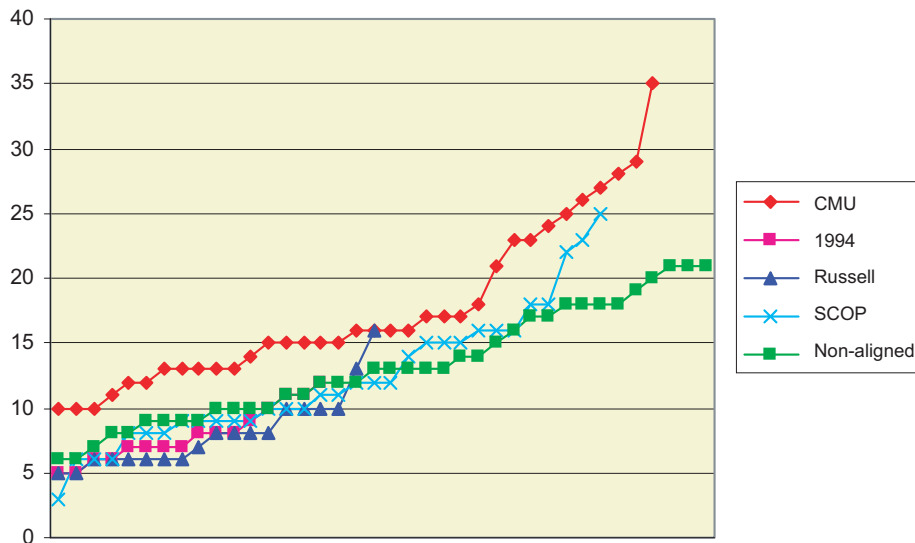
Chart 12: Students from low participation neighbourhoods (%), 2000/01



92. Change from 1998/99: median up 1%; upper decile up 1%; lower decile unchanged.

93. Differentiation: Chart 12A shows the patterns within the five institutional groupings.

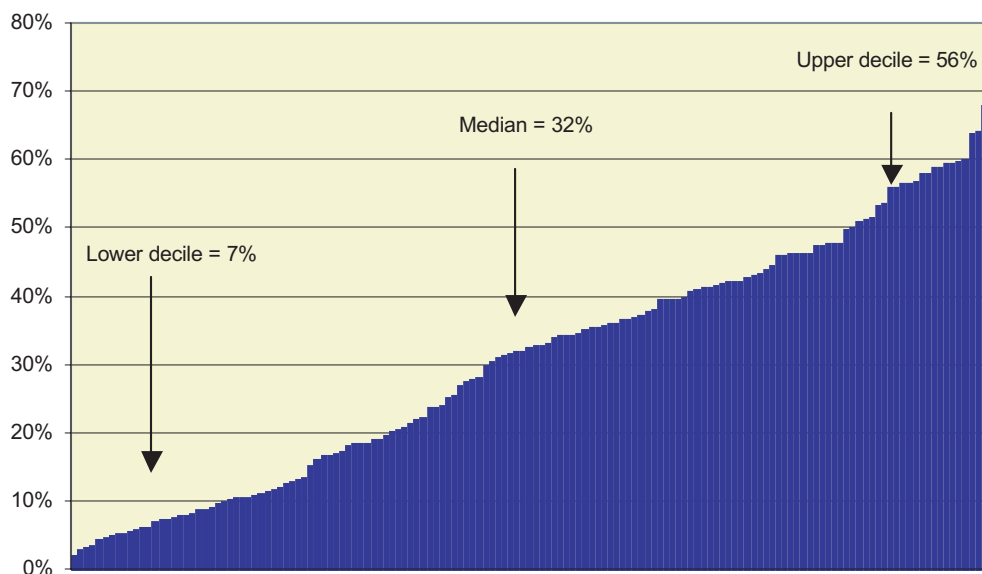
Chart 12A: Students from low participation neighbourhoods (%) by institutional grouping, 2000/01



94. The CMU group is again plainly dominant here: the SCOP and non-aligned groupings have some institutions which show high values; within the Russell Group there are two institutions which are outliers, both of which recruit locally and which are located in areas of comparatively low participation in higher education.

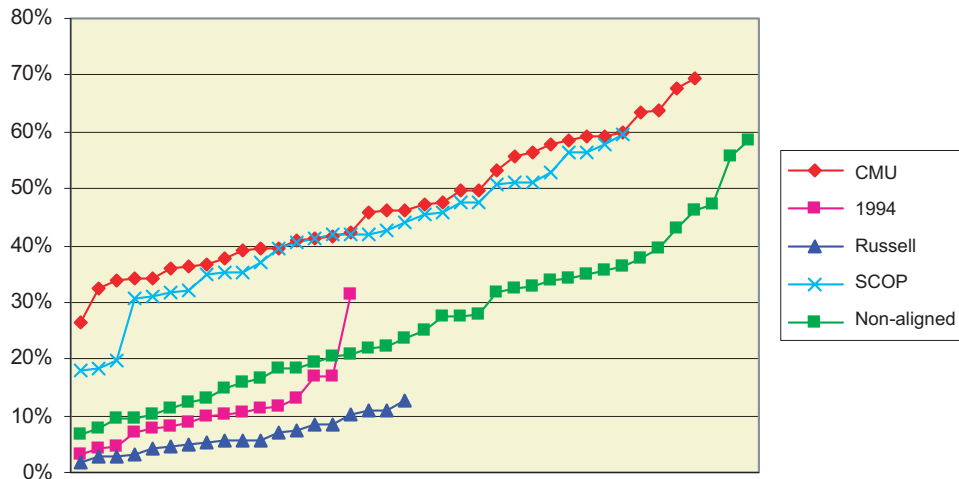
95. Turning now to entry qualifications as an aspect of the characteristics of the student body, Chart 13 shows the percentage of students accepted onto full-time undergraduate courses through UCAS and having entry qualifications other than two A-levels or SCE Highers.

Chart 13: Percentage of UCAS (UK-domiciled) accepted applicants having entry qualifications other than two A-levels/SCE Highers, 2000/01



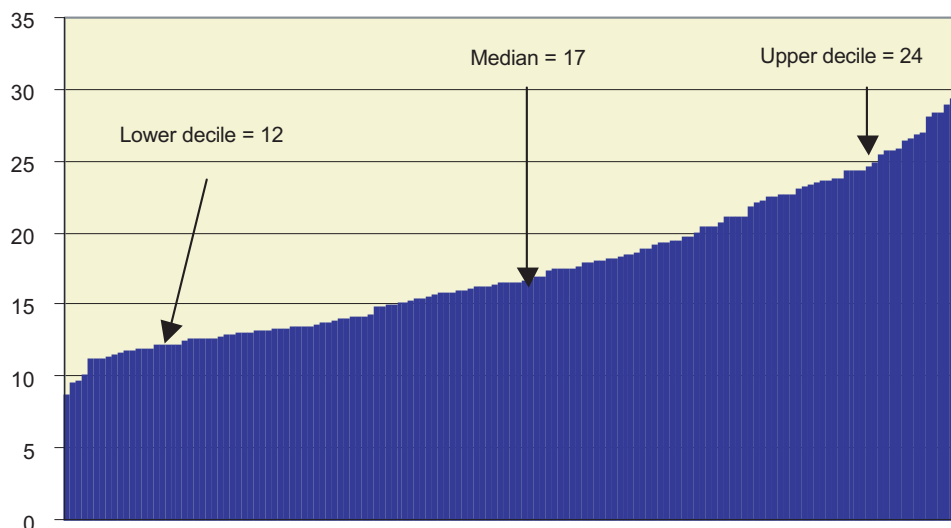
- 96. Change since 1998/99: median up 1%; upper decile down 1%: lower decile no change.
- 97. Differentiation: Chart 13A shows the patterns within the five institutional groupings.

Chart 13A: Percentage of UCAS (UK-domiciled) accepted applicants having entry qualifications other than two A-levels/SCE Highers by institutional grouping, 2000/01



- 98. Having considered those students who enter higher education without conventional qualifications, it is appropriate to add a reference to those who enter with the most common qualification, i.e. A-levels.⁶
- 99. Chart 14 shows the average A-level points on entry of first year full-time undergraduates who had A-levels as their highest entry qualification.

Chart 14: Average A-level/Highers points of full-time first degree entrants, 2000/01

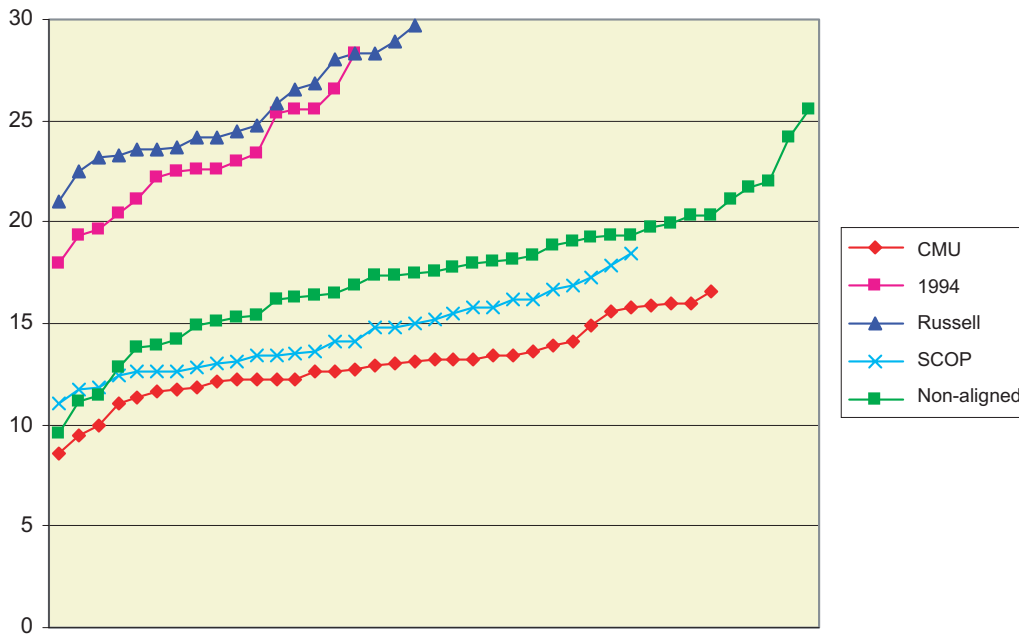


- 100. Change since 1998/99: not available. (The median increases by one percentage point since 1999/2000: other values are unchanged.)

⁶ Scottish qualifications have not been amalgamated within the data.

101. Differentiation: Chart 14A shows the patterns within the five institutional groupings.

Chart 14A: Average A-level/Highers points of full-time first degree entrants by institutional grouping, 2000/01

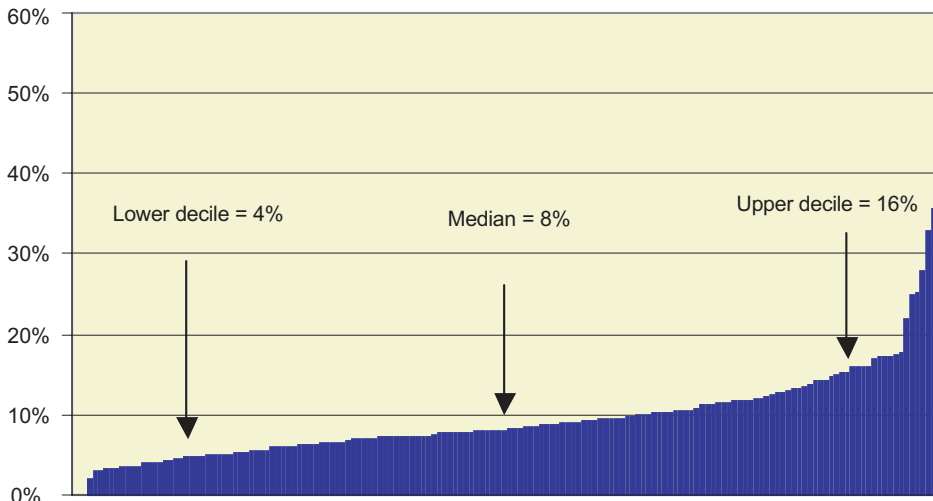


102. The 1994 and Russell Groups show very similar characteristics: the non-aligned group track a course between them and the SCOP and CMU groupings. On this measure, all of the five groupings appear to be internally consistent.

103. This section concludes with consideration of two aspects of outcomes from higher education, as represented by the degree classifications awarded to qualifiers from first degree programmes.

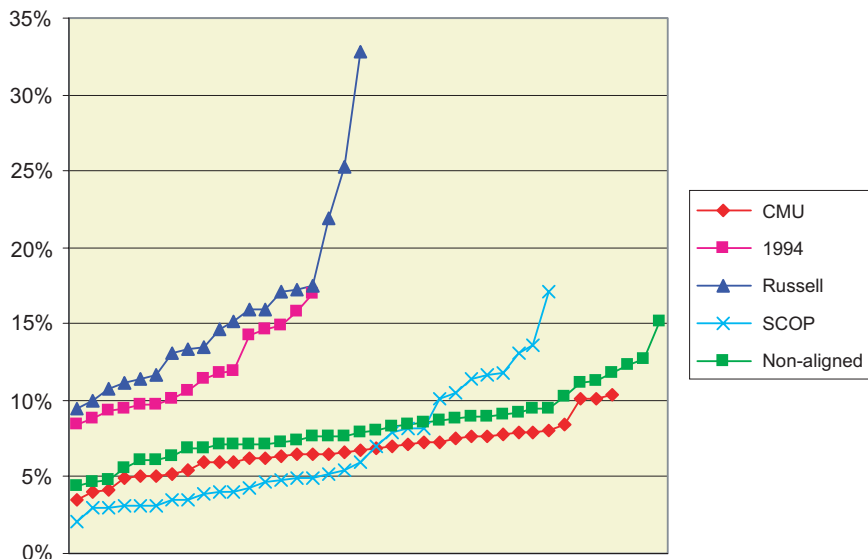
104. Chart 15 shows the distribution of first class honours degrees.

Chart 15: Percentage first class degrees awarded, 2000/01



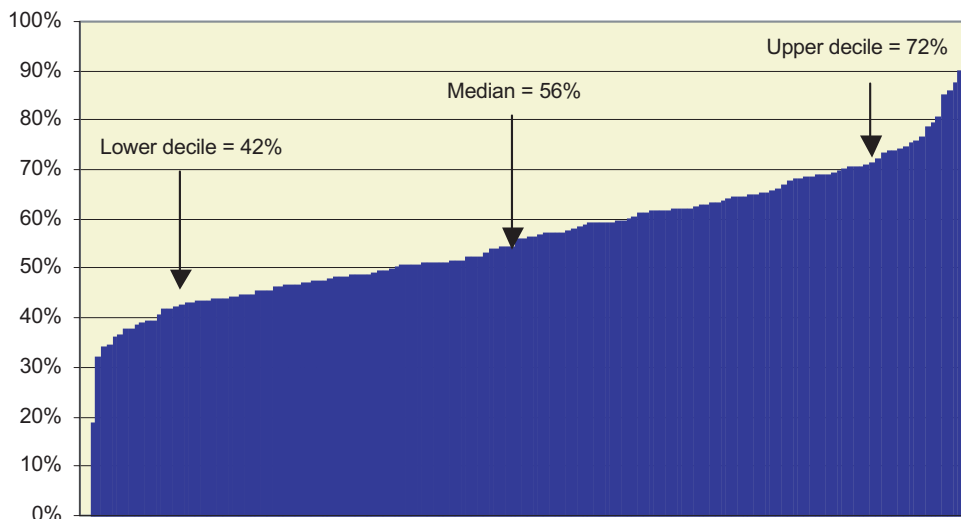
105. Change since 1998/99: not available. (The upper decile increases by one percentage point since 1999/2000: other values are unchanged.)
106. Differentiation: Chart 15A shows the patterns within the five institutional groupings.

Chart 15A: Percentage first class degrees awarded, by institutional grouping, 2000/01



107. It is also relevant to look at the combined total of firsts and upper seconds, which are graphed in Chart 16.

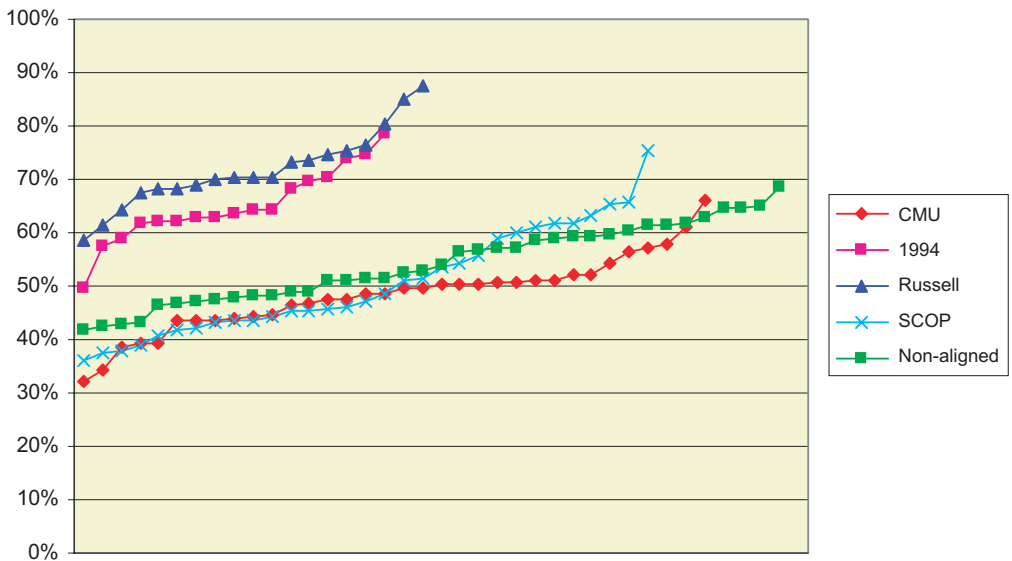
Chart 16: Percentage first & upper second class degrees awarded, 2000/01



108. Change since 1998/99: not available. (The upper decile and median have increased by two percentage points since 1999/2000: other lower decile is unchanged.)

109. Differentiation: Chart 16A shows the patterns within the five institutional groupings.

Chart 16A: Percentage first & upper second class degrees awarded, by institutional grouping, 2000/01



Financial issues

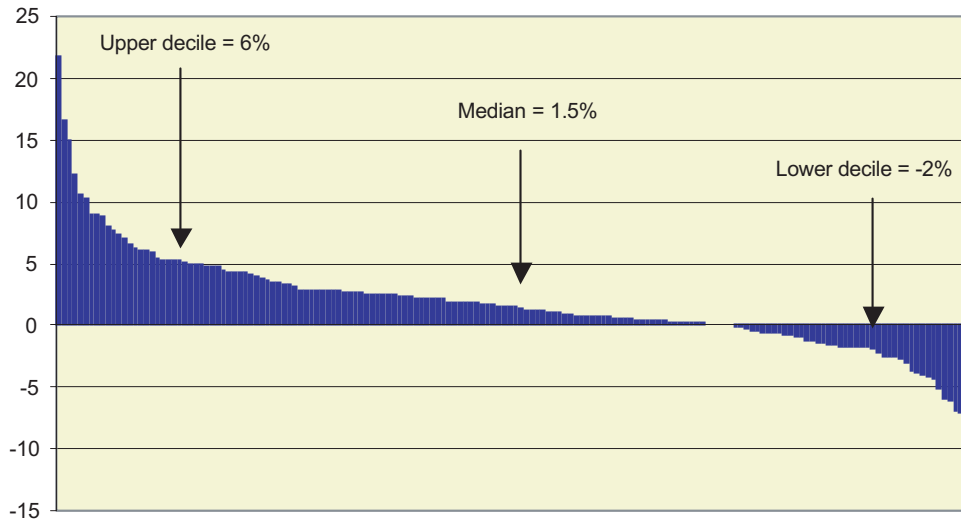
110. Turning now to financial issues, the last Patterns report included some analysis of financial security, and also of costs and “efficiency”.
111. This year’s report extends the financial coverage to include also the sources of income of higher education institutions, in view of the current interest in this issue.

Financial security

112. First, this section of the report looks again at some of the measures of financial security of higher education institutions which were reported on in the previous Patterns reports.⁷
113. Chart 17 shows the historical surplus/deficit for each institution in the most recent year as a percentage of income.

⁷ The measures of financial security are generally based on definitions determined by the Higher Education Management Statistics Group: for further information see HESA’s publications Higher Education Management Statistics - Institutional level. However, the Security Index follows the definition in the previous Patterns reports.

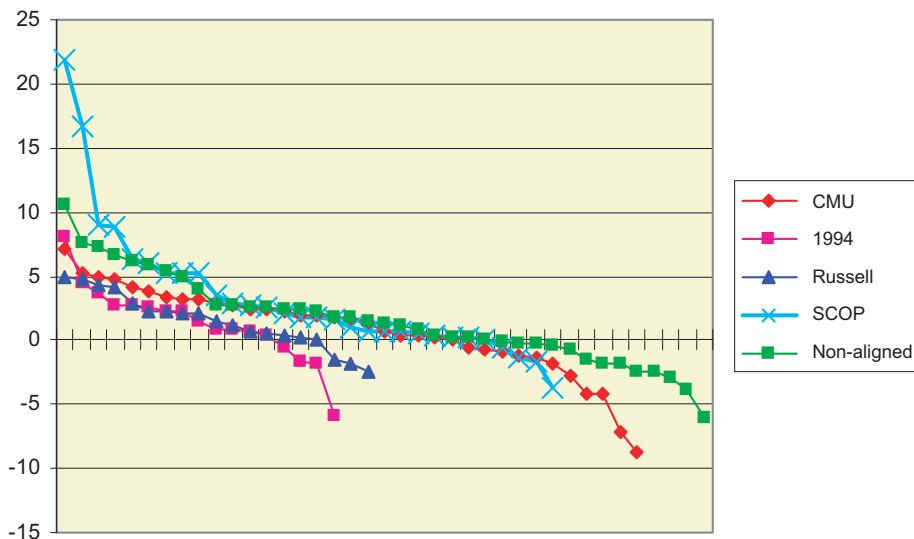
Chart 17: Surplus/deficit as percentage of income, 2000/01



114. Change since 1998/99: median down 2%; upper decile no change; lower decile -1% (the implication being a worsening situation except among those towards the top of the index).

115. Differentiation: Chart 17A shows the patterns within the five institutional groupings.

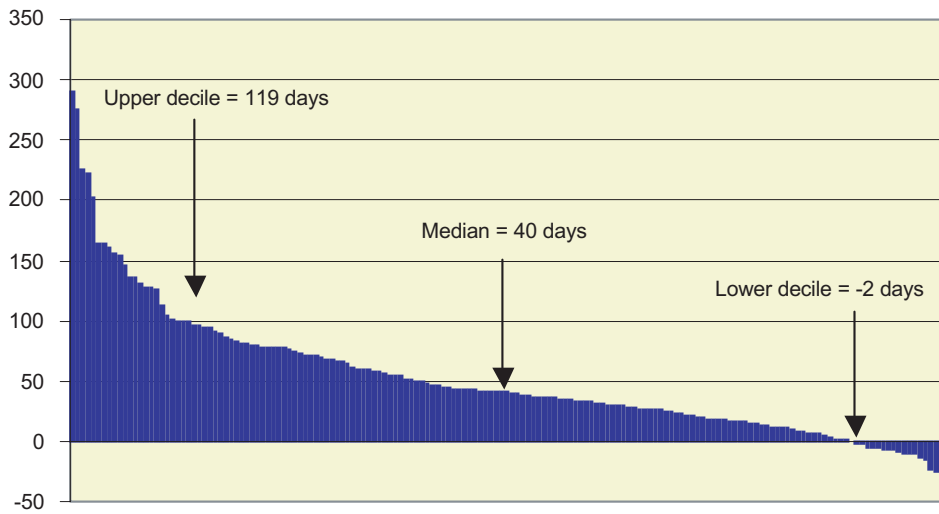
Chart 17A: Surplus/deficit as percentage of income by institutional grouping, 2000/01



116. Chart 17A shows very little differentiation between the five groupings. All show some of their members reporting a deficit, and the medians for all groups are at approximately the same value. There are however some outliers at both the top and bottom of the chart in all groupings.

117. Charts 18 and 19 show two other security measures, relating total expenditure to net liquid assets and total general funds respectively.

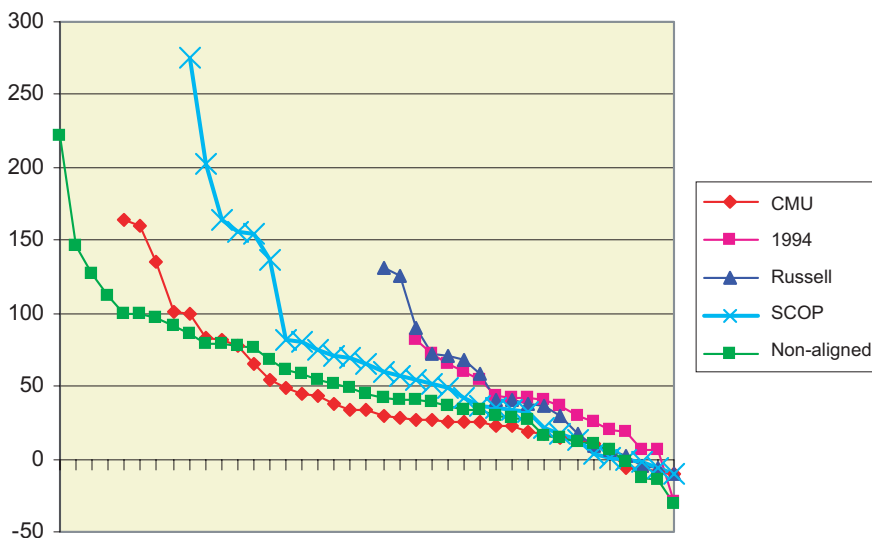
Chart 18: Days ratio of net liquid assets to total expenditure, 2000/01



118. Change since 1998/99: median down 9; upper decile down 16; lower decile down 13. (Generally, the sector shows a less robust position on this measure, continuing the negative trend since 1994/95.)

119. Differentiation: Chart 18A shows the patterns within the five institutional groupings.

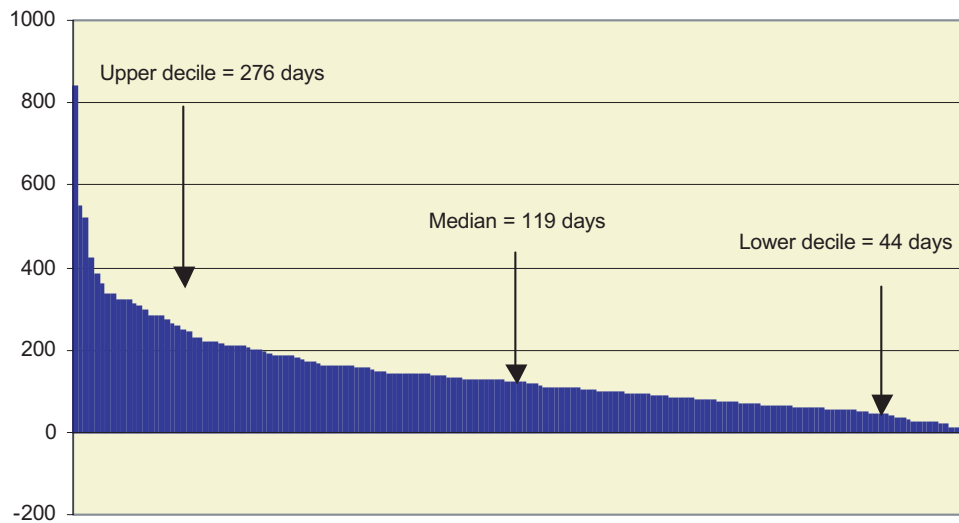
Chart 18A: Days ratio of net liquid assets to total expenditure by institutional grouping, 2000/01



120. Here again the five grouping all show similar characteristics, with only the SCOP group having a majority of its institutions reporting more than 50 days ratio of net liquid assets to total expenditure.

121. Chart 19 shows the equivalent situation regarding the ratio of total general funds to total expenditure.

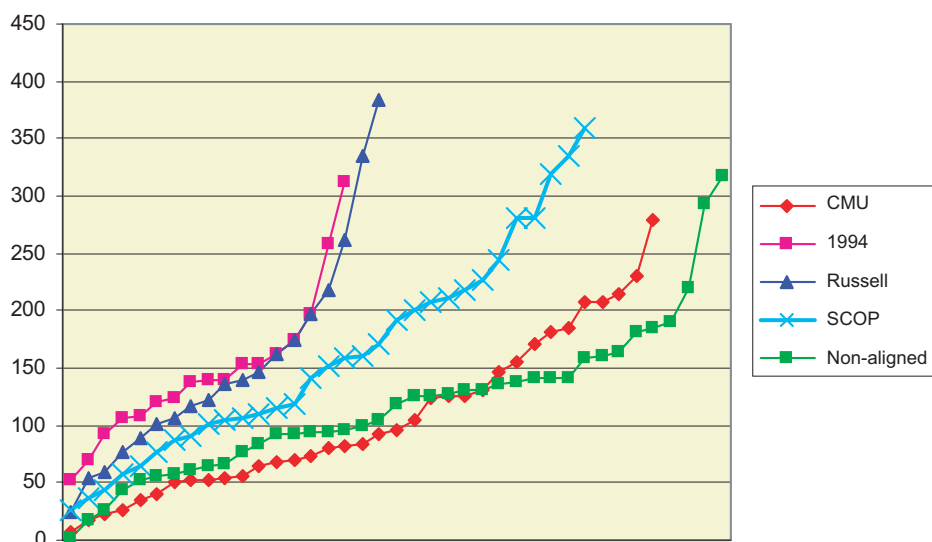
Chart 19: Days ratio of total general funds to total expenditure, 2000/01



122. Change since 1998/99: Median = -2 days; upper decile = +36 days; lower decile = +6 days. (No clear picture presents itself, although there is a modest improvement among institutions towards the top of the range.)

123. Differentiation: Chart 19A shows the patterns within the five institutional groupings.

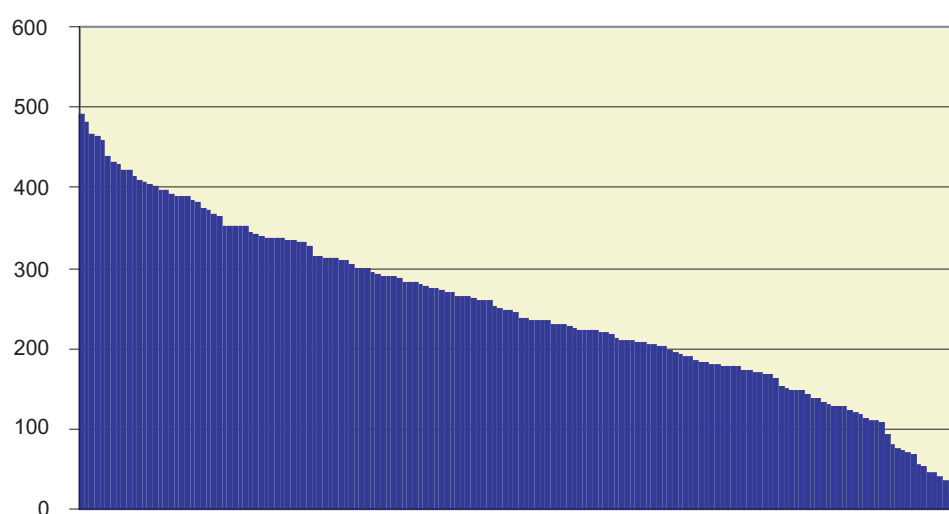
Chart 19A: Days ratio of total general funds to total expenditure by institutional grouping, 2000/01



124. On this measure, rather more differentiation is seen both between and within institutional groupings. The Russell and 1994 Groups follow very similar lines, although there is considerable variation within each of those groups. The SCOP group are similarly differentiated, while the CMU and non-aligned groups show similar characteristics to each other, and are generally internally consistent.

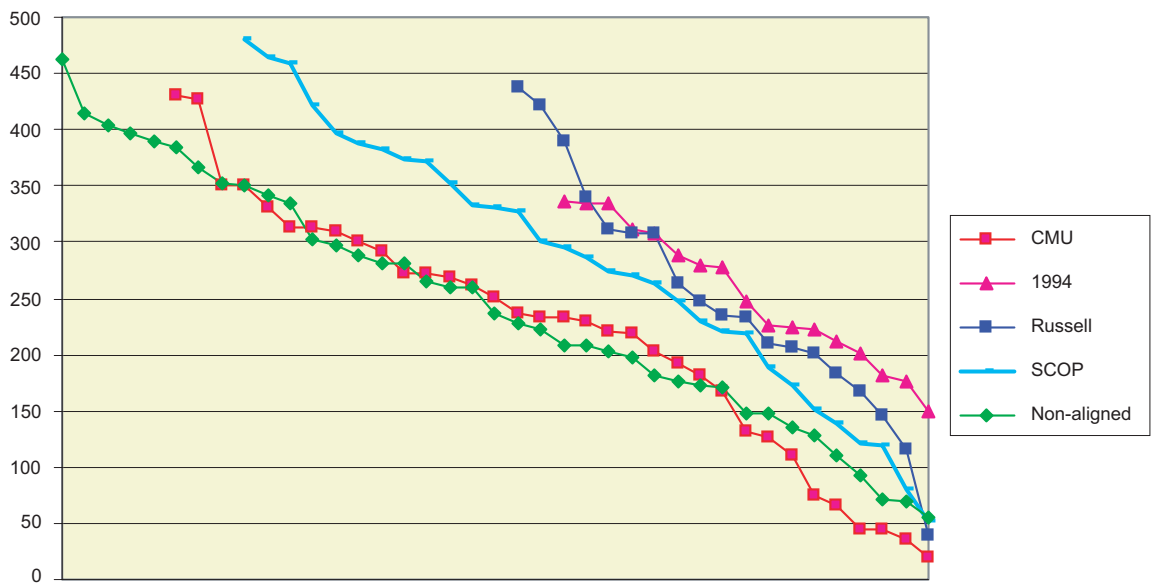
125. The two previous reports on Patterns of higher education institutions set out an index of financial security based on three factors (equally weighted):
- The average of the last two years' percentage ratios of historical surplus/(deficit) after tax to total income;
 - The days ratio of general funds to total expenditure;
 - The days ratio of net liquid assets to total expenditure.
126. The Security Index for the latest available year is set out in Chart 20. In order to calculate the index, the rank order of each institution against each of the indicators has been taken and reversed. The maximum possible score, given that 163 institutions have data available under this head, would be 489.

Chart 20: The Security Index, 2000/01



127. Note that this index does not report on the financial security of the sector as a whole, but simply on the relativities within the sector. It provides a basis for analysing aspects of institutional provision against a single measure of financial security, but a quantification of change from year to year within the sector as a whole cannot be derived from it.
128. It does however provide a basis for disaggregation of the sector, and an assessment of comparative financial security among the institutional groupings being studied in this report. The differentiation is shown in the Chart 20A.

Chart 20A: The Security Index by institutional grouping, 2000/01



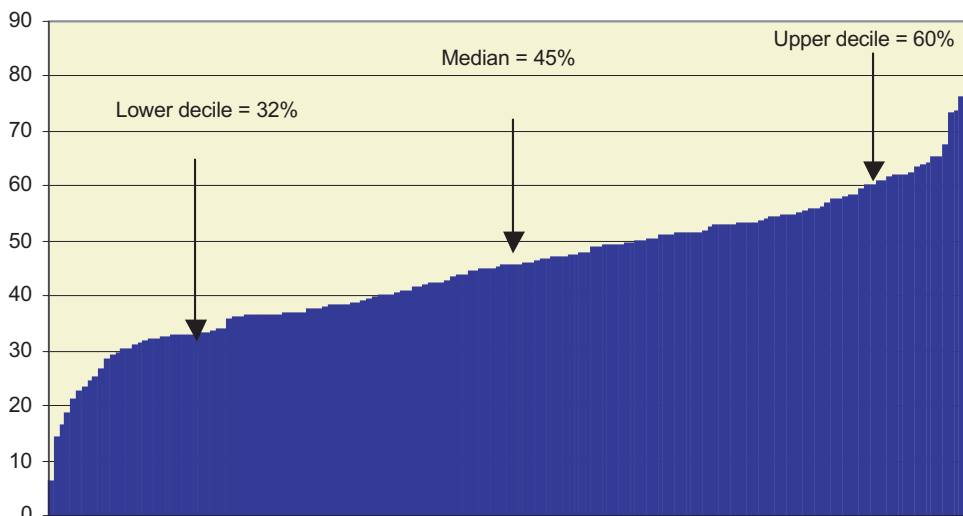
129. The SCOP institutions include some institutions at the top of the index. The most interesting feature is perhaps the fact that the 1994 Group are uniformly grouped within the middle of the index.

Sources of income

130. The Joint Performance Indicators Working Group, and the Higher Education Management Statistics Group which defined the financial indicators published by HESA, identified that dependence on funding council income was a further aspect of financial security. It is also, of course, an issue of inherent interest in the context of the differentiation of the sector.

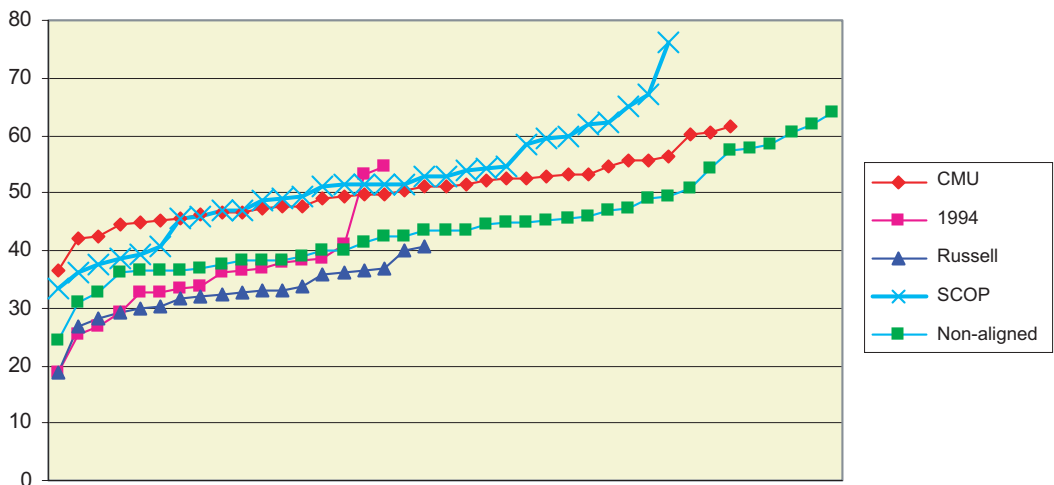
131. The percentage of income from the funding councils is shown in Chart 21.

Chart 21: Funding Council income as a percentage of all income, 2000/01



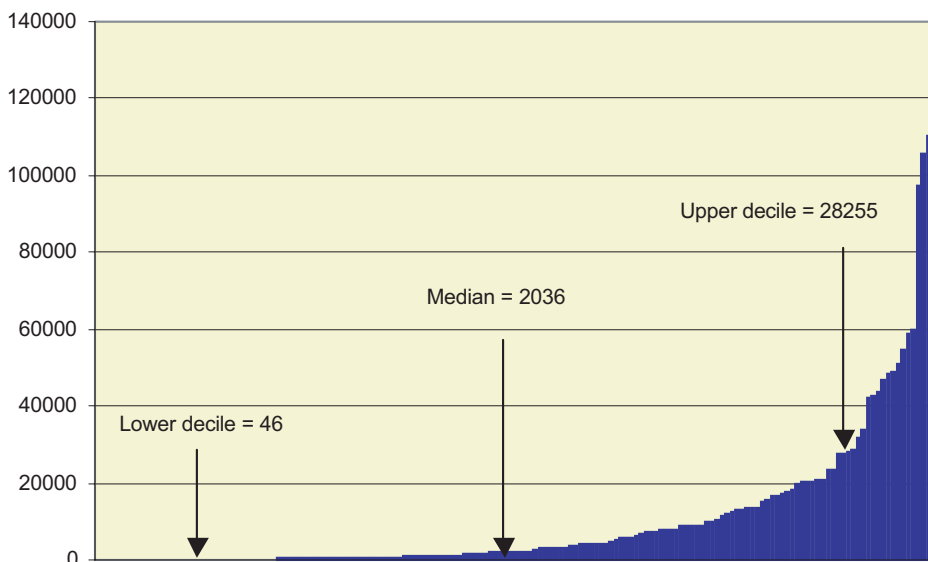
132. Change since 1998/99: Median up 1; upper decile up 1; lower decile up 2 . While the change is comparatively small, it is in the direction of a small increase in the proportion of funding coming from the funding councils. However, over 60% of the higher education institutions receive a majority of their funding from sources other than the funding councils.
133. Differentiation: Chart 21A shows the patterns within the five institutional groupings.

Chart 21A: Funding Council income as a percentage of all income by institutional grouping, 2000/01



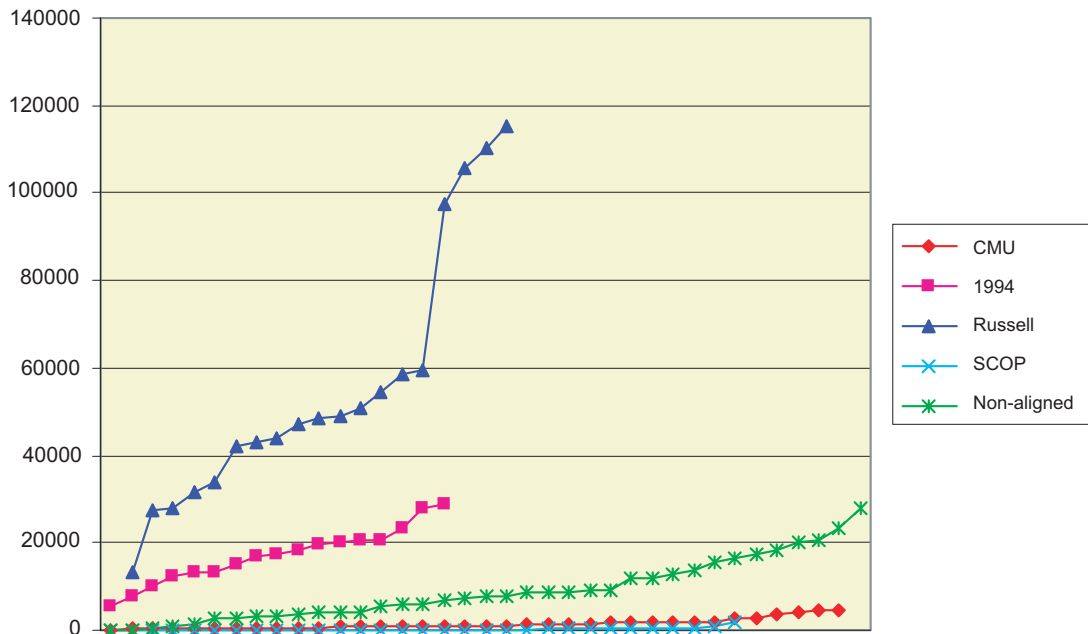
134. All of the Russell Group, and a large majority of the 1994 and non-aligned groups receive less than half of their income from the funding councils. (There are two notable outliers among the 1994 Group.) CMU institutions span the chart, with approximately half receiving more than 50% of their income from the funding councils, along with the majority of the SCOP institutions.
135. Turning now to other sources of income, Chart 22 shows the spread of the public funding of research, an area which is of current interest.

Chart 22: Public funding of research (£K), 2000/01



136. Change since 1998/99: median up 183 (10%); upper decile up 2303 (9%); lower decile up 22 (92%).
137. Differentiation: Chart 22A shows the patterns within the five institutional groupings.

Chart 22A: Public funding of research (£K) by institutional grouping, 2000/01



138. The differentiation between groups is striking, although it should be noted that the Russell Group is also internally differentiated, with four institutions receiving 40% of the income of the Russell Group as a whole. The remaining Russell Group members have a profile which overlaps with that of the 1994 Group, while the non-aligned group fall clearly between the Russell and 1994 Groups on the one hand and the CMU and SCOP groups on the other hand.
139. A similar level of differentiation can be seen in respect of income from UK industry and commerce, for which the overall spread within the sector is set out in Chart 23.

Chart 23: Income from UK industry and commerce (£K), 2000/01

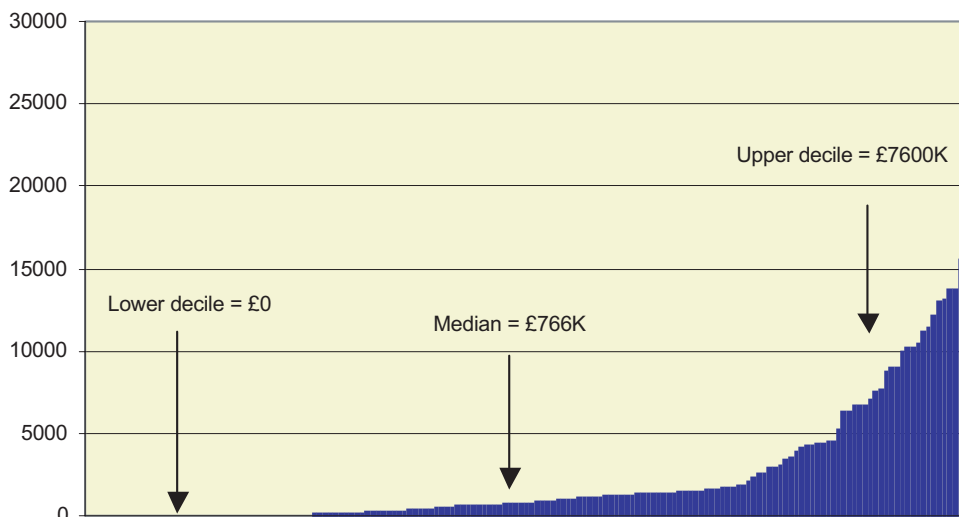
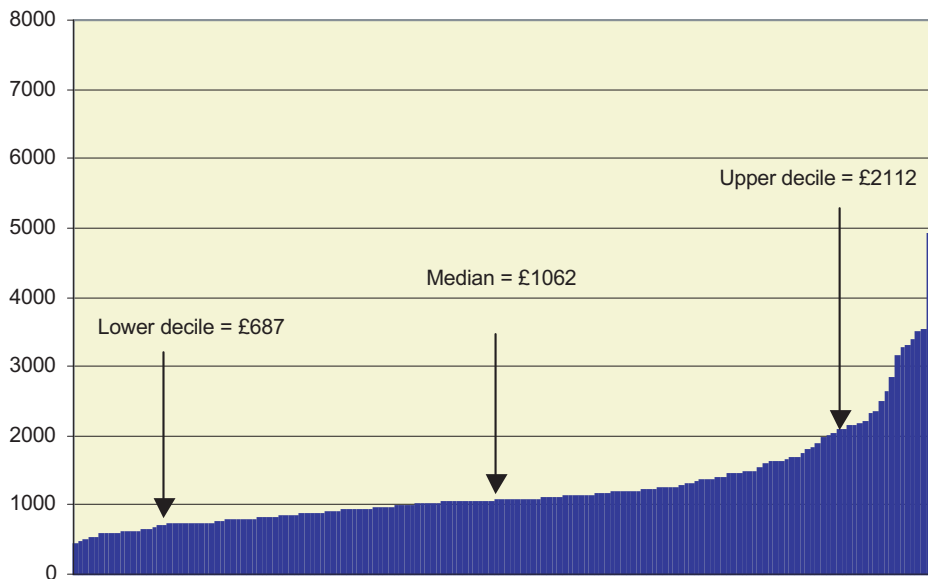


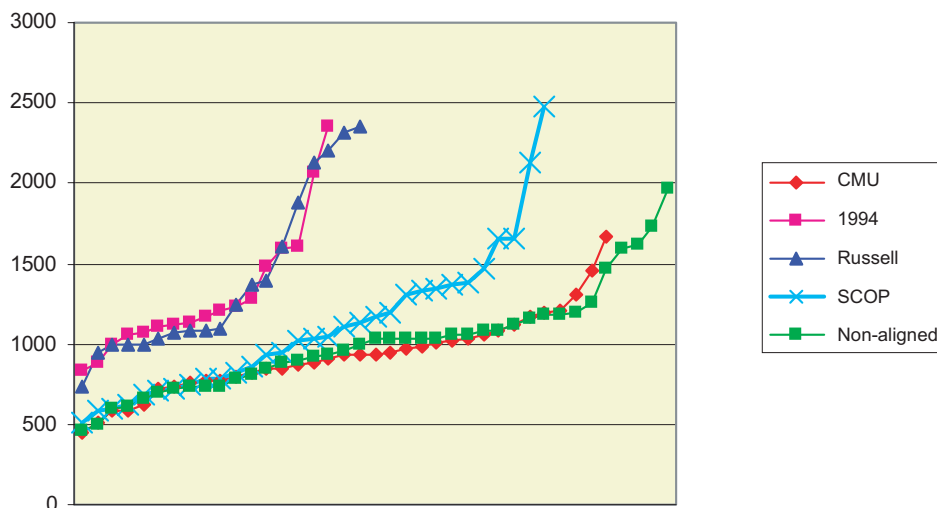
Chart 24: Administrative costs per FTE student (£), 2000/01



145. Change since 1998/99: median up £117 (12%); upper decile up £115 (10%); lower decile up £39 (6%). It appears to be the case that institutions at the upper end of spectrum have increased their administrative expenditure by more than the rate of inflation, while those at the lower end have been constrained to maintain the cost in real terms, or to reduce it in some instances. Some institutions have seen an increase significantly above the rate of inflation.

146. Differentiation: Chart 24A shows the patterns within the five institutional groupings.

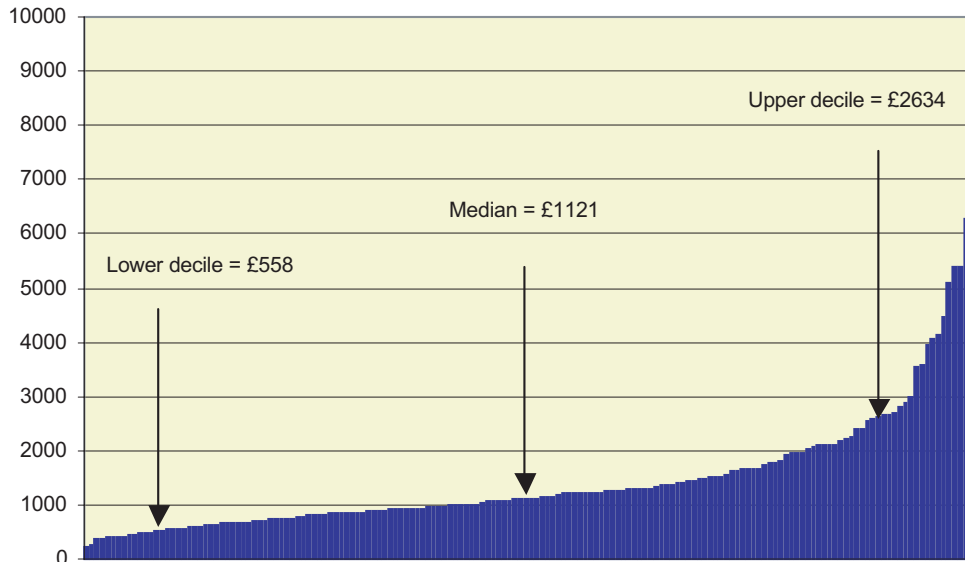
Chart 24A: Administrative costs per FTE student (£) by institutional grouping, 2000/01



147. The similar profiles of the Russell and 1994 Groups on this measure is striking, although both groups are internally differentiated. The CMU and non-aligned groupings also share similarities, and greater internal consistency, while the SCOP group appears to be widely differentiated.

148. However, because of differences in institutional organisation, it is important to consider this measure alongside the non-academic costs of academic departments. This is shown in Chart 25.

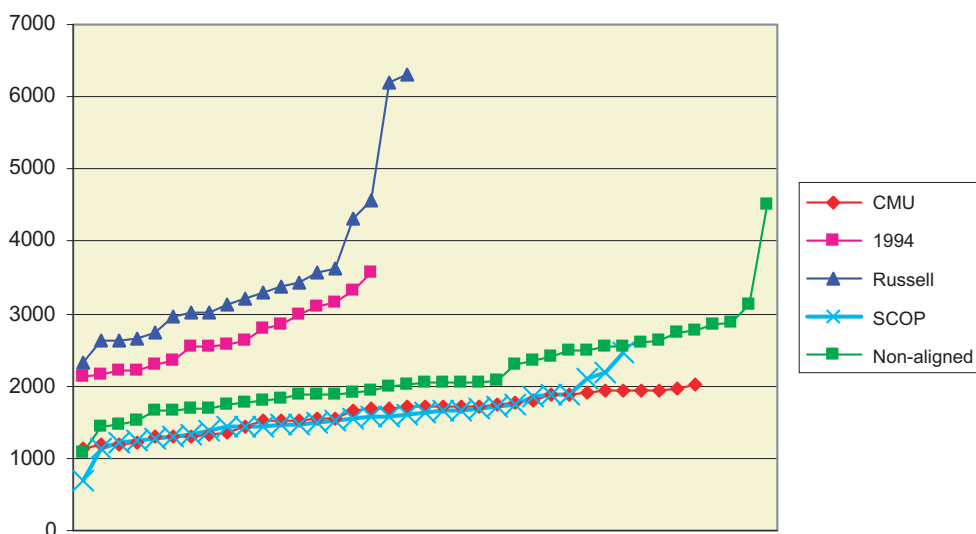
Chart 25: Academic departmental costs per FTE student, excluding academic staff (£), 2000/01



149. Change since 1998/99: median up £98 (9%); upper decile up £413 (20%); lower decile up £48 (9%). In general the sector has maintained its expenditure under this head at little more than the rate of inflation, although institutions at the upper end have increased their expenditure considerably.

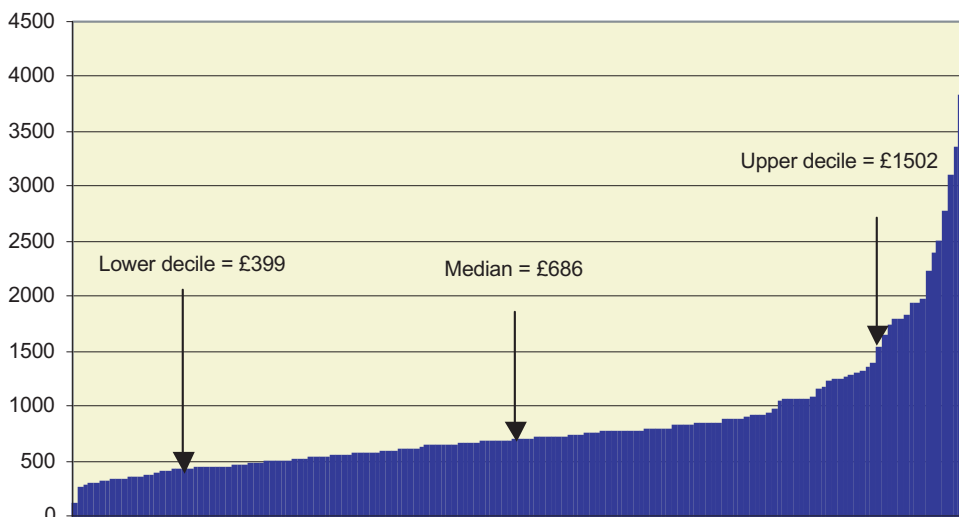
150. Differentiation: Chart 25A shows the patterns within the five institutional groupings.

Chart 25A: Academic departmental costs per FTE student, excluding academic staff (£) by institutional grouping, 2000/01



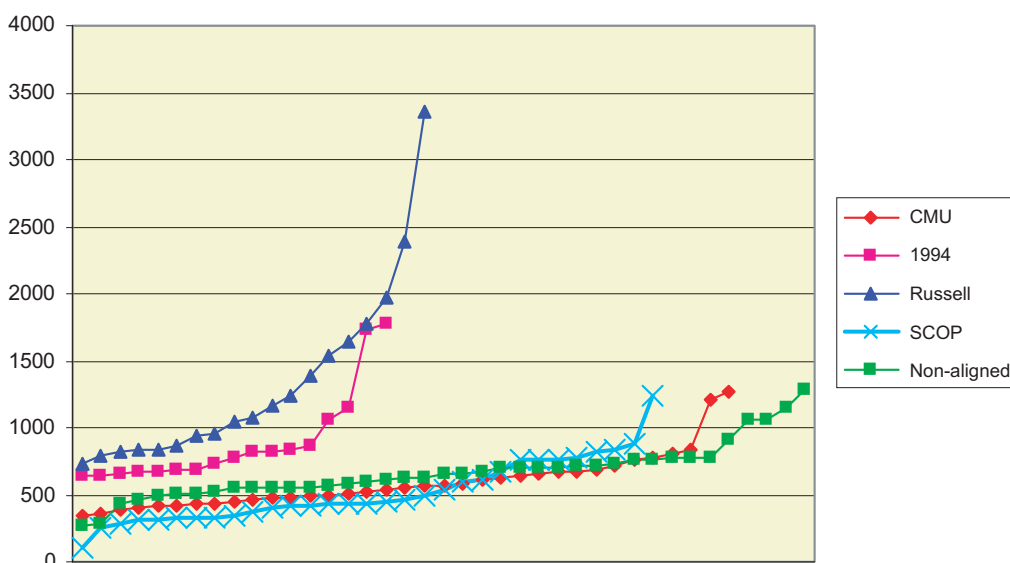
151. The graph shows a distinction which has been observed earlier between the 1994 Group and Russell Group on the one hand, and the SCOP and CMU groups on the other, with the non-aligned again featuring in the middle ground. However, again, the Russell Group is internally differentiated, with four institutions (and two in particular) featuring as outliers.
152. Finally this section looks at the cost of premises per FTE student. This is mapped in Chart 26.

Chart 26: Premises expenditure per FTE student (£), 2000/01



153. Change since 1998/99: median up £39 (6%); upper decile up £184 (up 15%); lower decile up £15 (2%). There is a general increase in premises expenditure, concentrated at the upper end of the graph.
154. Differentiation: Chart 26A shows the patterns within the five institutional groupings.

Chart 26A: Premises expenditure per FTE student (£) by institutional grouping, 2000/01



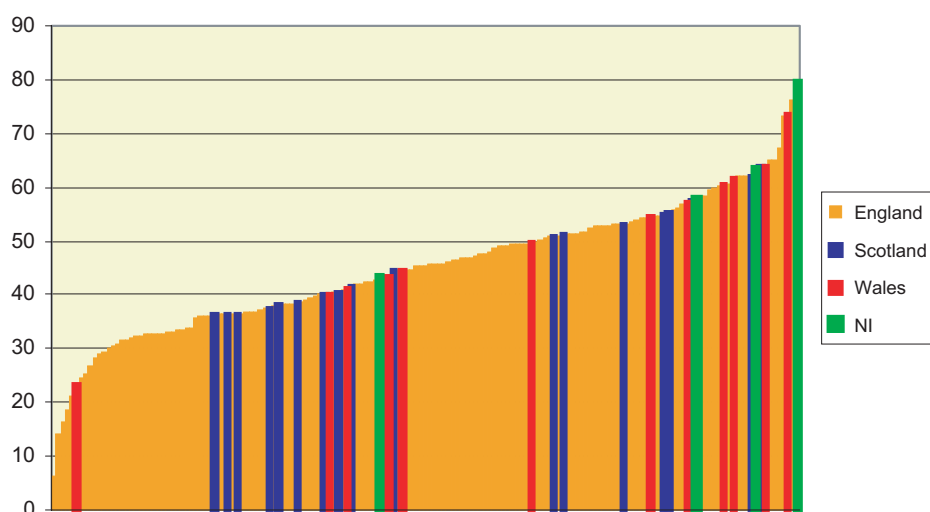
155. On this measure also, the 1994 and Russell Groups have similar features, although again there are two outliers within the Russell Group. On this measure the SCOP, CMU and non-aligned groupings have very similar characteristics. As was noted in the last Patterns report, there are some regional issues here, with institutions based in London having predictably higher premises costs.

C. Post-devolution issues

156. The first Patterns report identified some regional differences between the institutions of higher education within the United Kingdom. This section of the current report updates that analysis, by looking at a few features of the institutional patterns, disaggregated by country of the UK.

157. Chart 27 sets out the percentage of total income obtained from the relevant funding council.

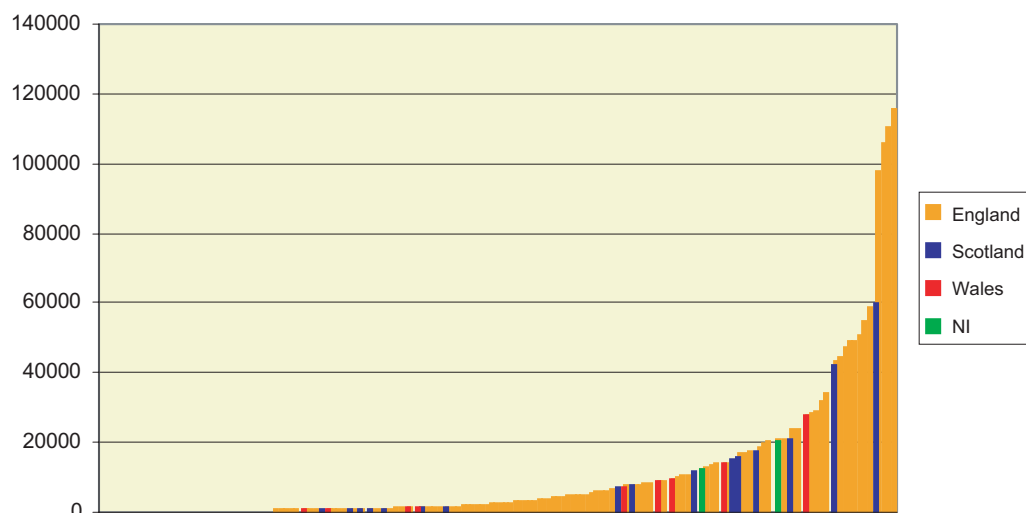
Chart 27: Percentage income from the funding councils by country of the UK, 2000/01



158. A majority of institutions in England and Scotland receive more than half of their income from sources other than the funding councils. Welsh institutions are evenly divided: the one Welsh outlier is a specialist institution.

159. Turning now to research funding, Chart 28 shows the spread of public funding of research disaggregated by the countries of the UK.

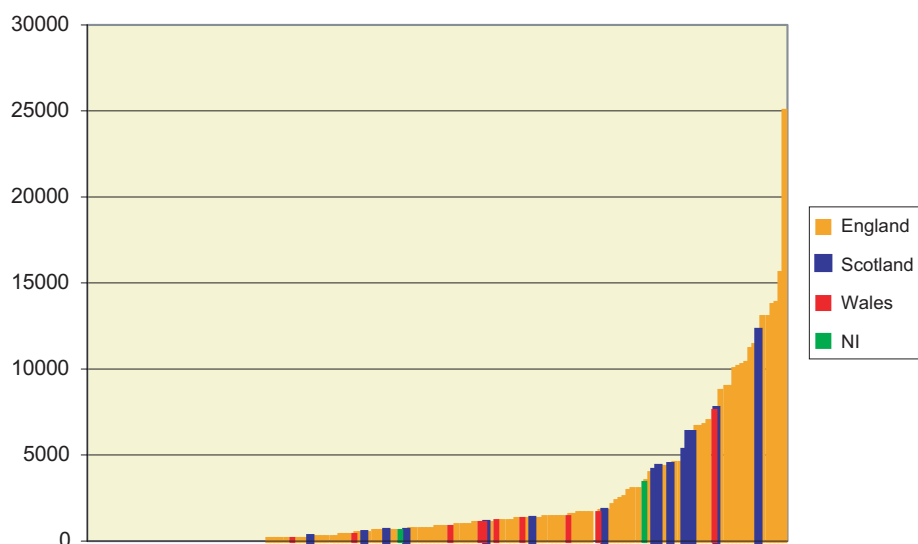
Chart 28: Public funding of research by country of the UK (£K) , 2000/01



160. The upper decile of the chart is dominated by English institutions, (a few having income in excess of £100M,) though with two Scottish institutions having income in excess of £40M. One institution in each of Wales and Northern Ireland has income in excess of £20M. The middle range of the chart features a number of Scottish, Welsh and Northern Ireland institutions.

161. A rather different picture is presented as regards funding from industry, as shown in Chart 29.

Chart 29: Funding from UK industry and commerce by country of the UK (£K), 2000/01

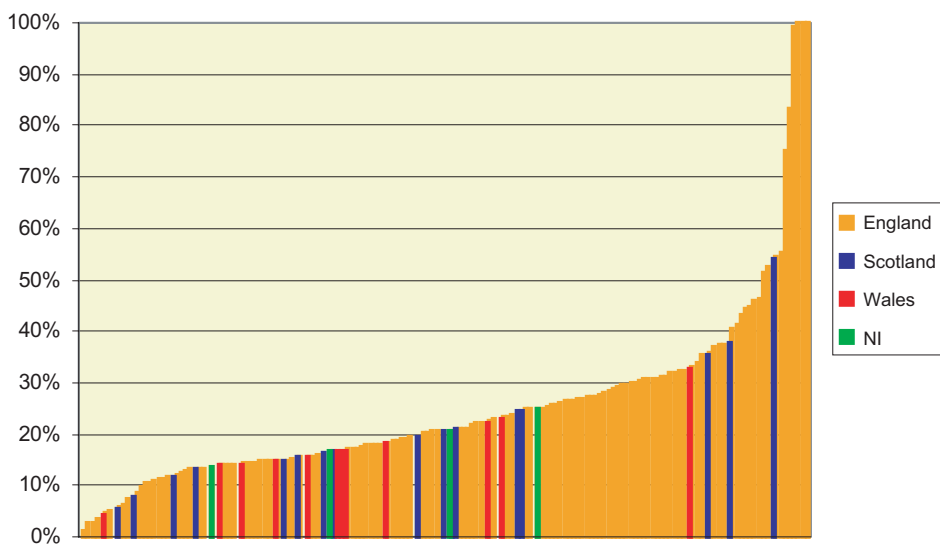


162. There is one Scottish institution – a specialist college – which features within the upper decile, and Scottish institutions generally feature strongly within the upper quartile of this distribution.

163. Turning now to the student profiles of the four countries of the UK, the level of study, social class and penetration of overseas students will be compared.

164. Chart 30 sets out the percentage of students following courses at the postgraduate level, by country of the UK.

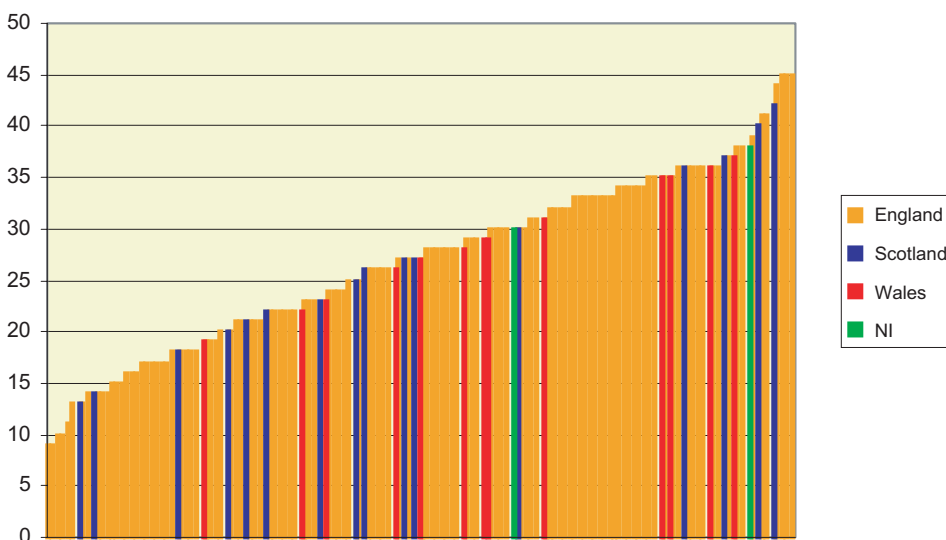
Chart 30: Percentage postgraduate students by country of the UK, 2000/01



165. While the graph is largely dominated by English institutions, there are three Scottish institutions and one Welsh one which feature within the upper quartile.

166. Chart 31 compares the social class distribution by institutions across the UK.

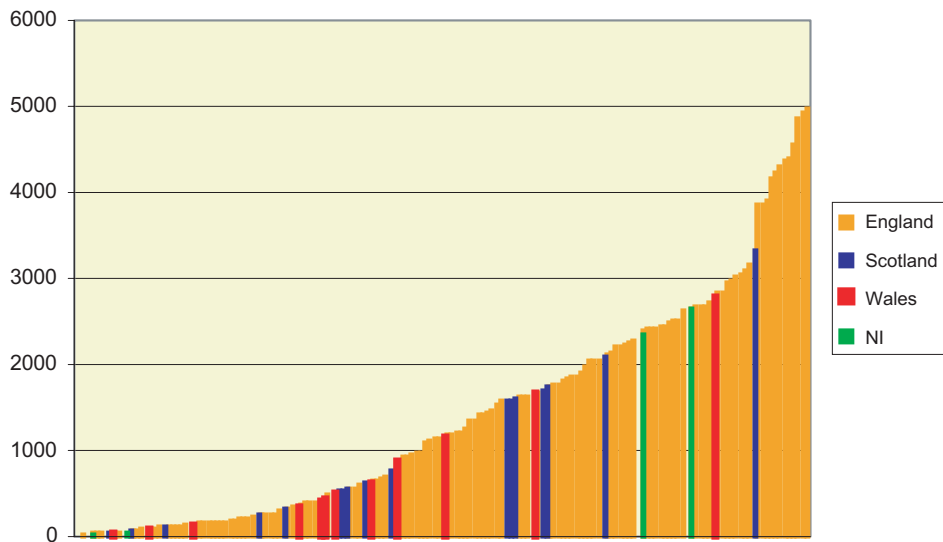
Chart 31: Percentage of young, full-time undergraduates from social classes IIIM, IV and V by country of the UK, 2000/01



167. All the four countries of the UK feature prominently in the upper quartile of the chart.

168. Finally in this section, Chart 32 shows the distribution of EU and international students by country of the UK.

Chart 32: Absolute numbers of EU and international students by country of the United Kingdom, 2000/01



169. English institutions are by far the most prominent on this measure, although the two Northern Ireland universities also have significant numbers of students from other countries (chiefly the Republic of Ireland). One Scottish university features within the upper decile, while only one Welsh institution exceeds the median value.

Conclusions

170. It is not the role of this report to present conclusions in terms of policy directions. Rather, it aims to presents a “state of the nation” summary, updating previous work, and addressing some issues of current interest, from a purely factual point of view.
171. The report has identified some shifts of emphasis in higher education during the last seven years, and in particular some very significant changes in the balance of provision between full-time and part-time study, and between different subjects provided in higher education institutions.
172. The differentiation between institutional groupings has been outlined in this report. In summary:
- The Russell Group and the 1994 Group share many features, and are generally comparable on most of the indicators considered within this report, but are distinguished chiefly by the fact that most members of the Russell Group have medical schools, and an emphasis on science and technology.
 - Within the Russell Group a small number of institutions are outliers on the basis of the statistical information available, and if these were excluded from the analysis, the Russell Group and the 1994 Group would show very similar characteristics.
 - The SCOP institutions are to a certain extent differentiated between those which are specialist providers in the creative and performing arts and in education and those which are general providers.
 - The CMU group are generally consistent in their statistics, and this is particularly noticeable in relation to access issues. It is however relevant to note that the CMU group has a changing membership, (indeed, it has changed during the preparation of this report).
 - There is a significant number of “non-aligned” institutions, drawn from both the pre-1992 and post-1992 universities which share many common features, and which generally lie between

the Russell/1994 groupings and the CMU/SCOP groupings on several of the indicators reported on within this paper. Interestingly, they appear to have a consistent profile on many of the measures set out in this report.

- In terms of financial security, all of the institutions of higher education share a general decline in financial security.

173. This report has also reported briefly on some differences between the institutions in each of the constituent countries of the United Kingdom, following devolution. It is too early to draw any firm conclusions about these differences, especially in view of on-going discussions both in England and within the devolved administrations about processes and funding. This is perhaps an area which will benefit from more detailed study in a future Patterns report.

Appendix 1: Total enrolments by subject of study, 1994/95, 1999/2000 and 2000/01

	1994/95	1999/2000	2000/01	Percentage change, 1994/95 to 2000/01	Percentage change, 1999/2000 to 2000/01
Medicine & dentistry	37,207	43,100	46,145	24%	7%
Pre-clinical medicine	10,415	10,750	11,420	10%	6%
Pre-clinical dentistry	1,693	1,820	1,925	14%	6%
Clinical medicine	21,838	25,920	27,315	25%	5%
Clinical dentistry	3,260	3,580	3,995	23%	12%
Balanced combinations	—	—	1,495	—	—
Subjects allied to medicine	100,947	193,810	233,320	131%	20%
Anatomy & physiology	4,816	5,760	6,075	26%	5%
Pharmacology	2,723	3,180	3,380	24%	6%
Pharmacy	6,779	9,250	11,030	63%	19%
Nutrition	1,685	2,050	2,065	23%	1%
Ophthalmics	1,763	2,860	2,720	54%	-5%
Audiology	189	1,230	1,380	630%	12%
Nursing	51,653	121,570	152,355	195%	25%
Medical technology	2,046	4,690	5,465	167%	17%
Other medical subjects	28,947	42,560	48,325	67%	14%
Balanced combinations	346	660	515	49%	-22%
Biological sciences	67,767	90,740	93,730	38%	3%
Biology	22,867	22,660	22,310	-2%	-2%
Botany	804	710	745	-7%	5%
Zoology	3,323	3,660	3,880	17%	6%
Genetics	1,620	2,150	2,150	33%	0%
Microbiology	2,081	2,610	2,545	22%	-2%
Molecular biology & biophysics	1,154	1,470	1,490	29%	1%
Biochemistry	7,808	8,330	8,165	5%	-2%
Psychology (not solely as social science)	19,422	29,340	31,045	60%	6%
Other biological sciences	7,276	17,430	19,260	165%	10%
Balanced combinations	1,412	2,380	2,145	52%	-10%
Veterinary science	2,939	3,560	3,815	30%	7%
Veterinary sciences	2,939	3,560	3,815	30%	7%
Agriculture & related subjects	14,509	14,760	15,625	8%	6%
Agriculture	7,817	9,350	9,940	27%	6%
Forestry	762	730	685	-10%	-6%
Food science	2,977	2,740	3,045	2%	11%
Agricultural sciences	437	460	490	12%	7%
Other agricultural subjects	2,482	1,440	1,435	-42%	0%
Balanced combinations	34	40	30	-12%	-25%
Physical sciences	72,511	69,540	69,285	-4%	0%
Chemistry	23,522	20,910	19,660	-16%	-6%
Materials science	447	340	305	-32%	-10%
Physics	14,041	13,150	12,905	-8%	-2%
Archaeology as a physical science	1,197	2,200	2,375	98%	8%
Astronomy	771	1,230	1,635	112%	33%
Geology	6,450	6,200	6,255	-3%	1%
Oceanography	615	830	895	46%	8%
Geography studies as a science	8,803	10,210	10,225	16%	0%
Environmental science & other physical sciences	15,177	12,940	13,615	-10%	5%
Balanced combinations	1,488	1,530	1,420	-5%	-7%

Appendix 1: Total enrolments by subject of study, 1994/95, 1999/2000 and 2000/01

	1994/95	1999/2000	2000/01	Percentage change, 1994/95 to 2000/01	Percentage change, 1999/2000 to 2000/01
Mathematical sciences	19,978	20,310	20,520	3%	1%
Mathematics	15,963	16,690	17,375	9%	4%
Statistics	2,540	2,320	1,970	-22%	-15%
Other mathematical sciences	833	660	535	-36%	-19%
Balanced combinations	642	630	640	0%	2%
Computer science	64,918	91,540	110,400	70%	21%
Computing science	64,918	91,540	110,400	70%	21%
Engineering & technology	139,334	123,910	129,925	-7%	5%
General engineering	18,231	16,090	17,455	-4%	8%
Civil engineering	19,537	15,100	15,420	-21%	2%
Mechanical engineering	22,172	22,110	21,705	-2%	-2%
Aeronautical engineering	3,610	5,020	5,525	53%	10%
Electrical engineering	10,170	6,280	7,200	-29%	15%
Electronic engineering	22,221	23,130	26,360	19%	14%
Production engineering	12,507	10,940	11,145	-11%	2%
Chemical engineering	6,484	5,650	5,535	-15%	-2%
Other engineering	296	720	970	228%	35%
Minerals technology	1,007	680	625	-38%	-8%
Metallurgy	1,078	700	780	-28%	11%
Ceramics & glasses	208	110	155	-25%	41%
Polymers & textiles	4,740	3,830	3,725	-21%	-3%
Other materials technology	2,988	2,370	2,215	-26%	-7%
Maritime technology	2,098	1,780	1,720	-18%	-3%
Biotechnology	1,212	700	660	-46%	-6%
Other technologies	2,830	2,560	3,235	14%	26%
Balanced combinations	7,945	6,140	5,490	-31%	-11%
Architecture, building & planning	49,394	42,470	44,000	-11%	4%
Architecture	11,755	13,300	13,945	19%	5%
Building	23,124	17,160	17,905	-23%	4%
Environmental technologies	2,565	2,200	2,340	-9%	6%
Town & country planning	11,458	9,280	9,155	-20%	-1%
Other architectural studies	492	500	580	18%	16%
Balanced combinations	—	—	70	—	—
Social, economic & political studies	119,343	133,540	141,665	19%	6%
Economics	21,733	23,930	23,010	6%	-4%
Sociology	19,669	23,250	26,100	33%	12%
Social policy & administration	7,850	7,720	7,355	-6%	-5%
Social work	21,680	27,550	31,595	46%	15%
Anthropology	3,012	3,880	4,030	34%	4%
Psychology (without significant element of biological science)	7,217	9,740	10,685	48%	10%
Geography (unless solely as a physical science)	8,167	8,610	9,195	13%	7%
Politics	17,536	16,900	17,095	-3%	1%
Other social studies	5,176	4,860	5,840	13%	20%
Balanced combinations	7,303	7,110	6,755	-8%	-5%
Law	53,347	57,850	60,160	13%	4%
Law	53,347	57,850	60,160	13%	4%

Appendix 1: Total enrolments by subject of study, 1994/95, 1999/2000 and 2000/01

	1994/95	1999/2000	2000/01	Percentage change, 1994/95 to 2000/01	Percentage change, 1999/2000 to 2000/01
Business & administrative studies	213,359	227,200	237,615	11%	5%
Business & management studies	133,707	138,480	144,920	8%	5%
Operational research	537	510	505	-6%	-1%
Financial management	7,931	9,060	10,005	26%	10%
Accountancy	25,136	22,500	23,120	-8%	3%
Marketing & market research	10,053	15,330	16,930	68%	10%
Industrial relations	8,516	11,740	12,860	51%	10%
Catering & institutional management	16,106	16,990	16,185	0%	-5%
Land & property management	3,380	2,440	2,455	-27%	1%
Transport, other business & admin studies	4,508	3,200	3,175	-30%	-1%
Balanced combinations	3,485	6,950	7,455	114%	7%
Librarianship & information science	15,495	25,060	28,795	86%	15%
Librarianship	893	1,280	1,555	74%	21%
Information science	3,484	4,060	3,715	7%	-8%
Communication studies	4,296	4,530	5,040	17%	11%
Media studies	4,656	11,310	13,605	192%	20%
Publishing	328	380	435	33%	14%
Journalism	1,508	3,150	3,820	153%	21%
Balanced combinations	330	360	625	89%	74%
Languages	81,150	90,280	96,335	19%	7%
Linguistics	3,122	4,720	6,440	106%	36%
Comparative literature	1,680	2,110	2,940	75%	39%
English	26,880	32,680	34,835	30%	7%
American studies	2,229	2,560	2,635	18%	3%
Celtic languages, literature & culture	959	1,630	2,290	139%	40%
Latin language & literature	189	130	190	1%	46%
Ancient Greek language & literature	50	150	210	320%	40%
Classics	2,310	2,950	2,975	29%	1%
Other ancient languages & related studies	360	420	380	6%	-10%
French language, literature & culture	6,158	5,930	6,040	-2%	2%
German language, literature & culture	2,892	2,470	2,560	-11%	4%
Italian language, literature & culture	795	1,350	1,600	101%	19%
Spanish language, literature & culture	1,849	2,700	3,295	78%	22%
Portuguese language, literature & culture	95	190	155	63%	-18%
Latin American languages, literature & culture	445	310	300	-33%	-3%
Scandinavian languages, literature & culture	407	440	440	8%	0%
Russian languages, literature & culture	1,052	830	780	-26%	-6%
Slavonic & East European languages, literature & culture	376	400	350	-7%	-13%
Other European languages, literature & culture	4,826	3,820	3,575	-26%	-6%
Chinese languages, literature & culture	610	610	615	1%	1%
Japanese languages, literature & culture	673	690	800	19%	16%
Other Asian languages, literature & culture	239	300	270	13%	-10%
Modern Middle Eastern languages, literature & culture	1,071	1,030	1,030	-4%	0%
African languages, literature & culture	183	160	145	-21%	-9%
Other language studies	1,362	2,390	2,560	88%	7%
Other or unspecified modern languages	6,225	5,580	5,965	-4%	7%
Balanced combinations	14,113	13,750	12,965	-8%	-6%

Appendix 1: Total enrolments by subject of study, 1994/95, 1999/2000 and 2000/01

	1994/95	1999/2000	2000/01	Percentage change, 1994/95 to 2000/01	Percentage change, 1999/2000 to 2000/01
Humanities	48,747	60,100	64,590	33%	7%
History	23,116	26,800	28,860	25%	8%
Economic & social history	1,589	1,350	1,310	-18%	-3%
History of art	5,225	7,470	8,630	65%	16%
History & philosophy of science	280	350	380	36%	9%
Archaeology	2,299	4,490	5,120	123%	14%
Philosophy	4,841	5,910	6,485	34%	10%
Theology & religious studies	7,913	10,050	10,335	31%	3%
Other humanities	1,379	1,640	1,560	13%	-5%
Balanced combinations	2,105	2,030	1,910	-9%	-6%
Creative arts & design	74,708	99,780	107,895	44%	8%
Fine art	12,573	15,910	16,475	31%	4%
Design studies	36,078	44,390	47,330	31%	7%
Music	9,605	14,720	15,910	66%	8%
Drama	8,025	12,750	13,525	69%	6%
Cinematics	1,759	4,350	5,515	214%	27%
Crafts	75	630	840	1020%	33%
Beauty & hairdressing	181	130	170	-6%	31%
Art & design other	5,383	5,700	6,940	29%	22%
Balanced combinations	1,029	1,200	1,185	15%	-1%
Education	135,430	131,400	149,275	10%	14%
Teacher training	66,974	56,510	58,490	-13%	4%
Physical education	5,949	7,920	8,855	49%	12%
Academic studies in education	31,889	29,830	37,020	16%	24%
Techniques in teaching children	1,272	1,250	1,435	13%	15%
Techniques in teaching adults	8,607	11,770	13,520	57%	15%
Education for those with special needs	3,109	5,180	6,025	94%	16%
Technology in education	754	1,060	1,165	55%	10%
Management & organisation of education	2,778	4,720	5,185	87%	10%
Other topics in education	13,679	12,640	17,160	25%	36%
Balanced combinations	419	520	425	1%	-18%
Combined	256,230	337,420	337,540	32%	0%
Combined or general science	8,911	9,630	9,775	10%	2%
Combined or general social science	4,485	4,980	3,980	-11%	-20%
Combined or general arts	13,775	12,500	11,355	-18%	-9%
Other combined or general courses/ modular courses	153,519	222,830	223,925	46%	0%
Combined general & leisure courses not elsewhere specified	6,517	3,640	3,565	-45%	-2%
Research methods	569	1,690	1,990	250%	18%
Balanced combinations	68,305	82,160	82,950	21%	1%
Subject unknown	149	—	—	—	—
Total - All subject areas	1,567,313	1,856,330	1,990,625	27%	7%

Appendix 2: Mergers within the higher education sector, 1994/95-2002/03

1994-95:

West London Institute of Higher Education merged with Brunel University

The Welsh Agricultural College merged with the University College of Wales, Aberystwyth

Duncan of Jordanstone College of Art merged with The University of Dundee

1995-96:

The British Postgraduate Medical Federation was incorporated into Imperial College of Science, Technology & Medicine, King's College London, University College London and London University - Senate institutes

St. Bartholomew's Hospital Medical College and The London Hospital Medical College merged with Queen Mary and Westfield College

1996-67:

Coleg Normal merged with University College of North Wales, Bangor

Winchester School of Art merged with The University of Southampton

Salford College of Technology merged with The University of Salford

1997-98:

Royal Postgraduate Medical School and Charing Cross & Westminster Medical School merged with Imperial College of Science, Technology & Medicine

Institute of Psychiatry merged with King's College London

La Sainte Union College of higher education merged with The University of Southampton

1998-99:

United Medical and Dental Schools of Guy's and St Thomas's Hospitals merged with King's College London

Loughborough College of Art and Design merged with Loughborough University

Moray House Institute of Education merged with The University of Edinburgh

The Scottish College of Textiles merged with Heriot-Watt University

Royal Free Hospital School of Medicine merged with University College London

1999-2000:

St Andrew's College of Education merged with The University of Glasgow

Westhill College merged with The University of Birmingham

2000-2001:

College of Guidance Studies merged with Canterbury Christ Church University College

Westminster College, Oxford merged with Oxford Brookes University

Wye College merged with Imperial College of Science, Technology & Medicine

North Riding College merged with The University of Hull

2001-2002:

Northern College of Education merged with Aberdeen and Dundee Universities

Bretton Hall College merged with University of Leeds

2002-2003:

London Guildhall University and The University of North London merged on 1 August 2002 to become London Metropolitan University.

Other mergers, both within the higher education constituency and across the higher/further education boundary are under discussion.

Appendix 3: Institutions within the groupings analysed within this report

The 1994 Group

Birkbeck College
Goldsmiths College
London School of Economics and Political Science
Royal Holloway and Bedford New College
The University of Bath
The University of East Anglia
The University of Essex
The University of Exeter
The University of Lancaster
The University of Manchester Institute of Science & Technology
The University of Reading
The University of St Andrews
The University of Surrey
The University of Sussex
The University of Warwick
The University of York
University of Durham

The Coalition of Modern Universities (CMU)

Anglia Polytechnic University
Bolton Institute of Higher Education
Coventry University
Glasgow Caledonian University
Kingston University
Leeds Metropolitan University
London Guildhall University
Middlesex University
Napier University
Queen Margaret University College, Edinburgh
Sheffield Hallam University
South Bank University
Staffordshire University
Thames Valley University
The Robert Gordon University
The University of Central England in Birmingham
The University of Central Lancashire
The University of East London
The University of Greenwich
The University of Lincoln
The University of North London
The University of Paisley
The University of Plymouth
The University of Sunderland
The University of Teesside
The University of Westminster
The University of Wolverhampton
University of Abertay Dundee
University of Derby
University of Glamorgan
University of Gloucestershire
University of Luton
University of Surrey, Roehampton
University of Wales College, Newport
University of Wales Institute, Cardiff

The Russell Group

Cardiff University
Imperial College of Science, Technology & Medicine
King's College London
London School of Economics and Political Science
The University of Birmingham
The University of Bristol
The University of Cambridge
The University of Edinburgh
The University of Glasgow
The University of Leeds
The University of Liverpool
The University of Newcastle-upon-Tyne
The University of Nottingham
The University of Oxford
The University of Sheffield
The University of Southampton
The University of Warwick
University College London
University of Manchester

SCOP institutions

Bath Spa University College
Bishop Grosseteste College
Buckinghamshire Chilterns University College
Canterbury Christ Church University College
Central School of Speech and Drama
Chester College of HE
College of St Mark and St John
Cumbria Institute of the Arts
Dartington College of Arts
Edge Hill College of Higher Education
Falmouth College of Arts
Harper Adams University College
Kent Institute of Art & Design
King Alfred's College, Winchester
Liverpool Hope
Newman College
Norwich School of Art and Design
Ravensbourne College of Design and Communication
Rose Bruford College
Southampton Institute
St Martin's College
St Mary's College
The London Institute
The Surrey Institute of Art and Design, University College
Trinity and All Saints College
University College Chichester
University College Northampton
University College Worcester
Wimbledon School of Art
Writtle College
York St John College

The Non-aligned Grouping

Aston University
Bournemouth University
Brunel University
City University
De Montfort University
Heriot-Watt University
Liverpool John Moores University
Loughborough University
Oxford Brookes University
Queen Mary and Westfield College
Swansea Institute of Higher Education
The Manchester Metropolitan University
The North-East Wales Institute of Higher Education
The Nottingham Trent University
The Open University
The Queen's University of Belfast
The University of Aberdeen
The University of Bradford
The University of Brighton
The University of Dundee
The University of Huddersfield
The University of Hull
The University of Keele
The University of Kent at Canterbury
The University of Leicester
The University of Northumbria at Newcastle
The University of Portsmouth
The University of Salford
The University of Stirling
The University of Strathclyde
The University of Wales, Lampeter
Trinity College, Carmarthen
University of Hertfordshire
University of the West of England, Bristol
University of Ulster
University of Wales, Aberystwyth
University of Wales, Bangor
University of Wales, Swansea

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