Cyngor Cyllido Addysg Uwch Cymru
Higher Education Funding Council for Wales
hefcw

Higher Education Funding Council for Wales

Future Structure of Universities in Wales

Confidential advice

to the

Minister for Education and Skills

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CONTENTS

1 Executive Summary

1.1 This paper provides advice as requested on the structure of the higher education (HE) sector in Wales. It shows, on a solid evidence base, that the current structure of HE in Wales is sub-optimal and does not serve Wales as well as it could. In advising on our preferred structure, we recognize that we are moving beyond a fully evidence-based position to an exercise of judgment. Nevertheless, we submit that the available evidence, coupled with the extensive experience that the Council is able to bring to bear, makes our preferred outcome reasonable.

1.2 In this document, we explore the background to the current position (section 3, with additional detail in Annexes A to C) and explain (section 4) the issue we are seeking to address, namely **that we are not achieving in Wales the full potential for the investment made in HE.** Despite the considerable strengths to be found in the universities of Wales, which we readily acknowledge, we do not have a sector as strong as it could be or, more crucially, as strong as it needs to be.

1.3 We provide an analysis (section 5) of the performance of the sector and an assessment (section 6) of the strengths and weaknesses of the institutions individually, with additional supporting material in Annexes D to F.

1.4 An exploration of possible structural options is offered (section 7) followed by an indication of the Council's preferred outcome (section 8), which is also reproduced below. In some cases there is a hierarchy of possible solutions, where viable alternatives to our preferred outcome exist. We have taken account of what we believe could be achieved within our current Corporate Plan period (i.e. by end of 2012-13) in reaching our recommendations. Should it be agreed that our preferred outcomes require a little more time then we would suggest that consideration be given to that possibility before moving to our alternatives.

1.5 It is important to emphasise that the Council's position on sector structure is strategic and does not derive from short term considerations about financial sustainability. Potential students and staff can continue to apply to Welsh universities with confidence. The issue is more that we are not achieving in Wales the full potential for the investment made in HE (including, for example, the capacity to secure additional funding, to capture research grants or to sustain a broad subject portfolio). As a result, we are not offering as good a service as we could to learners and employers. Despite the considerable strengths to be found in the universities in Wales, which the Council readily acknowledges, we do not have a sector as strong as it could be or, more crucially, as strong as it needs to be.

1.6 To be clear, we are not faced with institutions which are at evident imminent risk of collapse, even in the current financial climate. Institutions are generally able to manage their cost base to remain solvent. However, 'management of the cost base' today increasingly takes the form of significant cost reduction,

particularly via reduction of the breadth of portfolio available from HE in Wales, echoing the 'spiral of decline' highlighted in the Bull and Cooke report. We need instead to be focusing on what we could be achieving in Wales, and sector restructuring is one of the key means to that end.

1.7 Against this background, and growing international competition, **the Council's preferred outcome would be**:

1.7.1 Cardiff University to remain committed to securing a position as a world class research intensive university, while collaborating particularly with Swansea in areas where together they would be more effective on the UK stage, for example via joint REF submissions. Also to work with neighbours to deliver regional coherence, and potentially also to collaborate at a strategic level cross-border, where this strengthens what Cardiff can offer Wales. (In contrast to our reservation, below, over potential cross-border activity in NE Wales, the scale of Cardiff reduces any risk to the Welsh agenda).

1.7.2 Swansea University to maintain its aim of developing as a research intensive university with 1994 Group ambitions, especially with the impetus provided by its new Innovation Campus development, and to build and strengthen some key research and teaching partnerships with Cardiff – especially in STEM and Modern Foreign Languages. We would like Swansea to deepen regional coordination with the new Trinity Saint David/Swansea Metropolitan University structure, whatever form that finally takes.

1.7.3 Aberystwyth and Bangor Universities (given very recent appointments of vice-chancellors) to substantially widen and deepen their strategic partnership (including development towards integrated governance processes), building capacity of sustainable scale in a range of subject areas; and to develop by the end of our Corporate planning period a plan for merger.

1.7.4 Glyndŵr University to develop strong structural relationships with a range of FE Colleges within a group structure led by Aberystwyth and Bangor in order to expand the range of HE provision available in NE Wales, which is currently relatively narrow. This approach would also secure regional coherence.

- Merger of Aberystwyth and Bangor is not a precondition of development towards such a group structure but if it quickly became clear that insufficient progress could be made within our Corporate Planning period, then a plausible alternative approach to the issue of wider provision in NE Wales would be strong structural relationships involving FE Colleges (a 'community university' model), with a strong insistence upon coherent overall regional planning.

- Arguments could be advanced in favour of merger with Chester University, which is geographically close and complementary in provision. There is, in any case, much to be said for closer working in some provision, and in shared services, between 'current' Glyndŵr and Chester, and this might well remain true in future. We are unsure, though, given Glyndŵr's scale, that this outcome would secure adequate and continuing

focus upon the Welsh agenda, and this issue would need to be resolved before going in this direction.

1.7.5 University of Glamorgan, University of Wales Institute, Cardiff and University of Wales, Newport to merge, creating a post-92 institution appropriate to the population of SE Wales, provided this can be secured within our Corporate Plan period. We do not yet have a true ‘metropolitan’ university in SE Wales, comparable to those in similarly sized city-regions around the UK.

- If not achievable at that speed, we see considerable merit in UWN merging with Glamorgan; and, in that circumstance, arguments also in favour of UWIC merging with the new TSD/SMU structure (with or without UoW – see below); with a clear requirement of joint delivery of regional coherence in South West and South East Wales by the two new institutions.

1.7.6 University of Wales Trinity Saint David and Swansea Metropolitan University to merge as already planned, potentially but not necessarily also with the University of Wales. We would also require this new university to deepen regional coordination with Swansea University.

- If the Glamorgan/UWIC/UWN merger did not proceed, we see arguments in favour of UWIC also merging into this structure.

1.7.7 University of Wales: Like the McCormick Review, we believe that the status quo is unsustainable and further believe that we need an outcome in which the University of Wales’ governance demonstrates an overriding concern for the consequences for delivery of HE across Wales, and is alert to, and takes care of, the reputational consequences to Welsh HE of risks associated with the management of the ‘Wales brand’, including in respect of validation activities outside Wales. These concerns have been confirmed by recently published QAA reports on these matters. This recommendation is consistent, we believe, with the McCormick review.

- If UWIC does not merge with Glamorgan, and if satisfactory changes to the current ‘new UoW’ concept can be secured, then UoW should merge with TSD/SMU and UWIC.

1.8 Regional delivery: we committed in June 2010 to development of a richer and more coherent regional aspect to delivery of HE in Wales. The recommendations above are, in our view, consistent with the positive evolution of the progress already made with improving regional delivery.

1.9 Medical education: In the context of such radical restructuring of higher education in Wales, we consider that thought should be given to one ‘special case’ subject, namely Medicine. It may be appropriate to review the structure of medical education against the background of the emerging new structure for HE as a whole, to ensure that we have the best pattern from the perspectives of maintaining efficient and effective teaching provision, achieving critical mass in research and meeting the needs of Wales.

2 Introduction

2.1 This paper responds to a request from the Minister for Children, Education and Lifelong Learning on 22 March 2011, for advice on the structure of the higher education (HE) sector in Wales. We believe that the paper shows, on a solid evidence base, that the current structure of HE in Wales is sub-optimal and does not serve Wales as well as it could. In going now beyond the view expressed by the Council in its Statement on the structure of HE of 22 December 2010, we recognize that we are moving beyond a fully evidence-based position to an exercise of judgment. Nevertheless, we submit that the available evidence, coupled with the extensive experience that the Council is able to bring to bear, makes our preferred outcome reasonable.

2.2 We were asked to advise what our preferred outcome would be, rather than, for now, to reflect on how to get there. Given, however, that in some cases there is a hierarchy of possible solutions, we have taken account of what we believe could be achieved within our current Corporate Plan period (i.e. by end of 2012-13) in reaching our recommendations.

3 Background

3.1 Debate on the structure of the HE sector in Wales dates back to 1406, when Owain Glyndŵr sought support from the King of France for the rebellion against the English and for a plan to create two universities in Wales, one in the north and one in the south, an ambition endorsed by the Aberdare report in the late nineteenth century.

3.2 Subsequent growth of the sector (which in itself has seen numerous mergers, involving all current institutions) has resulted in too many institutions which are too small (as will be explored in more depth in Section 4). Explicit attention has been paid to this issue over a number of years, as outlined in Annex A, with a sharper policy steer to reconfiguration and collaboration being given following devolution through policies such as *Reaching Higher*. (See Annex B for actions taken under this policy).

3.3 Reconfiguration was further emphasised in *For our Future*. HEFCW responded through its Corporate Strategy, which was endorsed by the Cabinet of the Welsh Assembly Government as the action plan for *For our Future*. This included a specific target on reconfiguration, linked directly to sustainability. The Council then expressed its view even more clearly in a statement on the future shape of the HE sector in Wales in December 2010, attached as Annex C.

4 The issue

4.1 It is important to emphasise that the Council's position on sector structure is strategic and does not derive from short term considerations about financial sustainability. Potential students and staff can continue to apply to Welsh

universities with confidence. **The issue is more that we are not achieving in Wales the full potential for the investment made in HE (including, for example, the capacity to secure additional funding, to capture research grants or to sustain a broad subject portfolio). As a result, we are not offering as good a service as we could to learners and employers.** Despite the considerable strengths to be found in the universities in Wales, which the Council readily acknowledges, we do not have a sector as strong as it could be or, more crucially, as strong as it needs to be.

4.2 It is in this sense that we would react to any suggestion that discussion about merger is either irrelevant to, or detrimental to the interests of, individual HEIs, even in the present extremely challenging circumstances facing HE across the entire UK. As we say in our Corporate Strategy, our focus is upon:

- development of a system of higher education in Wales, with universities and further education colleges working together in an integrated fashion;
- more coherently organised provision in each region of Wales, for the benefit of local learners and employers;
- research performance at international standards of excellence, organised within and between institutions in ways that are sustainable, and strongly linked to other users and beneficiaries;
- a clear understanding of how each institution contributes to the system as a whole;
- all institutions being financially sustainable into the medium term and beyond.

4.3 To be clear, we are not faced with institutions which are at evident imminent risk of collapse, even in the current financial climate. Institutions are generally able to manage their cost base to remain solvent. However, ‘management of the cost base’ today increasingly takes the form of significant cost reduction, particularly via reduction of the breadth of portfolio available from HE in Wales, echoing the ‘spiral of decline’ highlighted in the Bull and Cooke report. We need instead to be focusing on what we could be achieving in Wales, and sector restructuring is one of the key means to that end.

4.4 It is, though, our contention that smaller institutions struggle more to accommodate resource pressures, to make significant investments and to afford the necessary management capacity to cope with financial and other pressures. We are sometimes challenged to provide evidence to support this contention. We have direct experience in Wales in respect of the Royal Welsh College of Music and Drama, which lacked the scope as an independent institution to secure sufficient investment capital to sustain its business. It is also clear that University of Wales Lampeter would, without our intervention and its merger with Trinity College Carmarthen, have faced acute sustainability challenges by now. Systematic consideration of the relationship between institutional scale and sustainability or effectiveness is limited but

there are a number of studies across the world (including Denmark, Finland, Canada, Australia as well as the UK) which illustrate the impact of scale in terms of sustainability, in terms of capacity for investment and in terms of academic synergies[1]. Generally, these studies support the case that smaller institutions are less sustainable and effective, although material from Australia suggests that the benefits of scale can diminish if an institution grows too large – not a problem that we believe to be imminent in Wales.

4.5 Available evidence also points to the potential to secure economies of scale through merger but this is addressed less extensively in the literature. Although some economies of scale could be realised by mergers (particularly in senior posts and, to a degree, through integration of systems and processes – though offset by the costs of meeting new geographical challenges), that is not the key consideration for us, and should not be overplayed in a context where we would not be aiming to reduce overall provision across Wales. The issue rather is about positioning HE in Wales to be the best that it can be for the funds available, in an ever tougher environment.

5 The evidence

5.1 Learning and Teaching: the record

5.1.1 Regional subject coverage: the recently submitted Regional strategies represented a first attempt to map taught provision in each region. It is clear that the strategies could benefit from further refinement, but they do provide useful indicative data about the spread of taught provision in different parts of Wales. In particular, there is an extensive range of subjects not available in the Glyndŵr portfolio in NE Wales which could be provided by the other Welsh universities in the region, or from nearby English institutions. Glyndŵr also faces significant competition from neighbouring Further Education (FE) colleges. Conversely, provision audits revealed significant areas of provision where there is, on the face of it, duplication of provision between institutions in SE Wales. In SW Wales, providers have attempted to organise provision to a significant degree under the auspices of the planned Dual Sector University, although there is likely to be further scope to coordinate the range of provision

[1] Skodvin O.J. (1999) Mergers in Higher education – Success or Failure? *Tertiary Education and Management*, 5, 65-80.
Harman, G and Harman, K. (2003) Institutional Mergers in Higher Education: Lessons from International Experience. *Tertiary Education and Management*, 9 (1), 29-44.
Oakleigh Consulting Limited (2010) HE Collaborations, Alliances and Mergers Desk review, Final Report.
Gilbert A.D. (2008) Opportunity, Strategy and Effrontery: Understanding the Manchester 2015 Agenda. Presentation to the OECD/Nordic Universities Association Conference.

with Swansea University. In practice, there may be market demand, and other, reasons why certain provision is not available in NE Wales. Similarly, it is argued by the institutions in SE Wales that relatively subtle curriculum nuances mean that there is not nugatory competition between them. Nonetheless, there would appear to be scope for a more rational provision of higher education in each of the regions, and in more instances than mentioned above.

5.1.2 Quality of learning and teaching: the last cycle of QAA institutional reviews in Wales delivered *limited confidence* for the University of Wales and Lampeter, *confidence* for all others. The new cycle has a new methodology, a rolling programme of reviews and a more risk based approach. No outcomes have been published yet. We are, however, awaiting the outcome of the most recent institutional review of the University of Wales, together with subsequent work undertaken by the QAA, on which we will report separately.

5.1.3 NSS outcomes have been positive. Overall satisfaction has been higher in Wales than the UK as a whole. Results for each institution are now being benchmarked against the anticipated outcomes, given institutional (eg size, research/teaching led), subject (arts vs. science, law, etc) and student characteristics (eg ethnicity, part-time/full-time, age etc) parameters. All institutions achieved or exceeded their benchmark value in 2010 with the exception of Lampeter (but that was going through merger process), and Newport. The performance of institutions against their benchmarks for 2010 will be published later in 2011, and from 2011 will be published with the other NSS outcomes.

5.1.4 Provision relative to population: the most recent data available show Wales with 3.33 HEIs per 1000 head of population compared to a UK average of 2.65. Scotland is marginally higher than Wales at 3.66. No region of England has a greater number of HEIs per 1000 head of population than Wales apart from London, which however is an exceptional region, with an abnormally high proportion of small, specialist institutions. With its highly developed transport infrastructure, London also serves the needs of neighbouring regions.

5.1.5 Medical education: one aspect of the structure of HE in Wales which was commented upon positively in the Council's 1999 advice on the structure of the sector (HEFCW W99/101HE) was the existence of only one medical school. There is a very uneven distribution of medical provision in Wales. Most of it is in Cardiff which is comparable in size to competitor medical schools in the UK. Some of the provision registered at Cardiff is delivered in North Wales on a successful 'hub and spoke' approach which provides an effective balance between the breadth of curriculum which can be sustained by Cardiff and meeting specific needs for health provision elsewhere in Wales. By contrast, the provision at Swansea University, at just 140 students, is very small in UK terms and will remain small, even if it secures GMC approval to run its own provision for a total of 280 students .

5.1.6 Further Education Colleges (FECs): for historical reasons, the structure of relationships between FECs and HEIs in Wales is complex, with some HEIs managing up to 14 franchise partners, most of whom, in turn, are managing partnerships with a range of HE Institutions. If nothing else, this complexity requires expenditure of management time to manage and runs the risk of sub-optimal provision which could be addressed through the type of rationalisation which would inevitably result from mergers of HEIs.

5.1.7 Widening Access: the Reaching Wider partnerships are an example of where institutions coming together have enabled the whole to be greater than the sum of the parts. They have been effective in drawing together partners within and beyond HE (e.g. FE, Careers Wales, local education authorities) to work together to provide opportunities which it is unlikely that individual institutions could have done on their own. For example, the North Wales Reaching Wider partnership has established, with Business in the Community, a North Wales Employers' STEM forum with HR representatives from national companies such as Airbus, Cadbury and United Utilities to develop employability and work-based learning opportunities for young people and adults. A collaborative approach has also been needed to tackle the low level of HE participation in the Heads of the Valleys, with the development of high-level skills being considered essential to underpin the economic development of this area. The Universities Heads of the Valleys Institute (UHOVI) involves the University of Glamorgan, University of Wales Newport and FE institutions in the delivery of Foundation Degree and work based learning provision to individuals living or working in the Heads of the Valleys. Overall, though still with scope for improvement, the record on widening access in Wales is good by UK standards.

5.2 Research: the record

5.2.1 Research Assessment Exercise (RAE): in the 2008 RAE Wales' overall performance was below that for the UK as a whole, with 14% of its activity rated 4* compared to a UK average of 17%, and 35% rated as 3* compared to 37%. Welsh institutions submitted a disproportionately high proportion of very small submissions – 8% of the UK total of submissions with fewer than 5 staff.

5.2.2 Research Councils: Wales' record in winning grants from the Research Councils is comparatively poor. The proportion of Research Council income won by the sector has fluctuated between 3.1% and 3.4% of the UK total over the last ten years, compared to a stretching target of 5%. Of this income Cardiff alone accounted for over 50% in 2009/10 (and features strongly in ESRC and MRC terms), and the four 'research intensive' institutions accounted for 97%. Performance in respect of Research Council grant capture has been examined in depth by the Council's Research, Innovation and Engagement Committee. The recommendations of that committee's

report support the conclusions of this document.[2] Larger institutions are more likely to be able to achieve the critical mass in research groups required to win Research Council grants in the more heavily funded areas of science, engineering and medicine.

5.2.3 This concern is accentuated by the emerging trends in Research Council policy, which focus on grants to fewer, larger research groups and more strategic partnerships. For example, the EPSRC's current Delivery Plan states 'we will build on our strategic relationships, working with .... those organisations most able to help us achieve our ambitions and as a consequence focus on our strategic partner universities which account for 70-80 per cent of our investments'. The MRC's delivery plan states 'demand management solutions, promotion of shared use of large equipment , and the focus on centres of excellence will lead to further concentration'. The Research Councils are also increasingly focussing their postgraduate studentships on a limited number of doctoral training centres instead of providing awards to individual departments or students (and we have been successful in winning one from ESRC on a collaborative basis). Following the Wakeham review [*Financial Sustainability and Efficiency in Full Economic Costing of Research in UK Higher Education Institutions* - June 2010], we can also expect pressure from Research Councils upon institutions to reduce their overheads costs by 5 per cent per annum for the next three years.

5.2.4 Historical performance and current institutional size position Wales poorly for future research council grant capture as policies of funding concentration begin to bite, and there is a real risk that grant income could fall sharply in future unless these structural issues are urgently addressed. (Data on Research Council grant capture by Welsh institutions is at Annex E).

5.2.5 The Chief Scientific Adviser for Wales has expressed the view that in Wales we need to focus on our real areas of strength, build critical mass and lose the tail of underperforming research, and this is likely to be reflected in the revised Science Policy for Wales. Similar sentiments have been expressed by the First Minister, Carwyn Jones ['Supporting research excellence in Wales', *Momentum*, Swansea University, April 2011].

5.2.6 <u>Magnet effect for inward investment</u>: The impact of a strong and broad research base around institutions of significant size and scope featured in the case made at UK level for the overall support for science and research in the last comprehensive spending review. Five beneficial impacts of research have been cited by the Department for Business, Innovation and Skills: improving the performance of existing businesses; improving public policy and public services; attracting R&D investment from global business; creating new businesses; and, delivering highly skilled people into the labour market.

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http://www.hefcw.ac.uk/documents/council_and_committees/committees/RIEC/Research%20Sub-Group%20Report.pdf

In Wales, the only university with a research turnover of major size and scope by UK standards is Cardiff (£131m), with Swansea, the 2nd highest, at only £36m (2009/10 data). Examples from Wales, such as EADS with Cardiff and Tata and Rolls Royce with Swansea, confirm that really large inward investment developments are associated with larger universities. This point gains salience from the emphasis in the Economic Renewal Programme on working to secure 'anchor companies' in Wales. This is not to say that other universities don't have good links with industry, but on a smaller scale.

5.3 Innovation and Engagement

5.3.1 The Higher Education Business and Community Interaction Survey (HEBCIS) shows that Wales performs well compared to the UK average in terms of engagement with small and medium sized enterprises (SMEs). There is an argument, as demonstrated by the Dragon Innovation Partnership in South West Wales, that increased collaboration and join-up in the marketing and provision of services to local businesses in particular, leads to increased levels of HEI-SME business interactions. However, Wales fares relatively poorly in terms of engagement with large businesses. For example, in 2008/09 Wales accounted for less than 1% of UK income derived from the provision of continuing professional development to large companies. This is probably a reflection both of the size of institution and of the relative lack of large businesses head-quartered in Wales.

5.3.2 The picture is equally mixed in relation to Welsh success in the commercialisation of research outputs. While successive HEBCIS surveys show that Wales outperforms other parts of the UK in the generation of spin-out companies, it performs less well in commercialisation of research via patenting and licensing activity. However, this is a moving picture and in 2008/09 Wales secured a 20% increase in total income received from intellectual property, although, even so, Wales accounted for only 1.2% of the UK total income from intellectual property (IP) but, within this figure, secured 7% of all IP income derived from SMEs. Commercialisation of IP (via spinout, licensing and patenting activity) is also a specialist area and there is increasing competition amongst UK HEIs for appropriately skilled professionals, which is one of the reasons for movement towards 'open innovation systems' in which HEIs work with third parties to take on some of the risks involved in return for a share of the potential rewards (e.g. Cardiff University's relationship with Fusion plc), but where the scale of potential business will be a factor in securing a third party partner. There are also potential benefits from pooling commercialisation resources as outcomes from an Academic Expertise for Business (A4B)-funded pilot involving shared 'IP scouts' by Aberystwyth, Bangor and Swansea universities is beginning to demonstrate. The proportion of institutional governing body members drawn from the commercial and business sectors is below the UK average. Addressing this deficit could help to increase business interactions and raise overall levels of stakeholder awareness. Sector reconfiguration could present an opportunity to engage more business people in governing bodies.

5.4 Sustainability

5.4.1 Economies of scale: in 2008/09 Wales had eight institutions below the median UK size in terms of full time equivalent students, and only three above the median. Wales had seven institutions below the median income and four above. Other indicators suggest that Welsh institutions could be suffering from diseconomies of scale. For example, nine institutions were above the UK median for staff costs as a percentage of total income, and only two below, with one of those below being the largest institution. A similar picture emerges from examining total income per square metre, where only three Welsh institutions (the three largest) are above the median, and five institutions are clustered at the very bottom of the lowest quartile.

5.4.2 Financial health: the sector in Wales has tended to perform somewhat better than the English sector over the past few years in terms of operating surplus and some other main indicators, although that was not the case in 2009/10. In part this has been because Welsh institutions overall (with certain exceptions) have tended to act more conservatively/prudently than their English counterparts, by conserving their cash and borrowing less. The past few years of comparatively healthy funding have meant that by and large the sector has not faced significant financial pressures. Those years have now come to an end and institutions are clearly going to be more financially stretched in future. The impact of this is already being seen, with a number of institutions, both in Wales and across the UK, announcing staff reductions, subject rationalisation and other economy measures. Smaller institutions, unless they are in specialist niche markets, are likely to face greater pressures than larger ones – and even in specialist niche areas, as our March 2011 decision on additional support to the conservatoire provision of the University of Glamorgan demonstrates, the pressures are acute.

5.4.3 Uncertainty is increasing not just over the replacement of mainstream teaching grant (and potentially other grant funding) by fee income, but also over other income streams as well, ranging from overseas student income (with the uncertainties arising from the new visa regime) to private sector research funding. Smaller institutions are likely to be more vulnerable to adverse movements in their income streams because they will have less ability to absorb shocks than larger ones, less flexibility to prioritise use of resources (and cross-subsidise from other income streams) and less ability to take a long term view and provide investment and development funding, although it may also be that, in some circumstances, they can react faster to the unexpected. For smaller institutions, the limited range of options for responding to cost pressures results in a greater tendency to reduce the breadth of curriculum, which serves the community less well and risks direct adverse impact on the provision of up-skilling and re-skilling required by the economy.

5.4.4 In this context, the argument is sometimes raised by some institutions in Wales that merger discussions would be a distraction from more urgent concerns, would be a poor use of the time of senior management and

governors, and would be debilitating to staff. This is a matter of judgment, but we may conclude that the combination of UK-wide pressures and those specific to Wales (not least the political determination to resolve the structural question) make it arguably a better use of management and governor time to move swiftly to more sustainable structures, and hence reduce the time and energy spent on defending the status quo. There can be little doubt that an HE sector in Wales that was working in harmony with the Welsh Government would function more effectively.

6 The evidence: performance of HEIs

6.1 As already said (paragraph. 4.1), our position in respect of sector structure does not derive from current or likely immediate failure of HE institutions in Wales. We are not faced with institutions which are at evident imminent risk of collapse, even in the current financial climate. But as we have shown above, there are good grounds for arguing that the structure of the HE sector in Wales is distinctly sub-optimal. As we say in our Corporate Strategy, if we were designing an HE system for Wales today, it would be unlikely to match the present picture.

6.2 In considering Welsh HE institutional performance particularly in the context of the broader performance of HEIs across the UK, it is reasonable to acknowledge that contextual factors, such as relative historical levels of public investment, general economic performance, school performance and the structure of the economy all contribute to the challenge of remaining competitive in a UK context. Nonetheless, the extent to which the sector is configured best to meet those challenges remains critical, and is one of the factors that lies within Welsh control.

6.3 Further light is cast on the relative performance of HEIs in Wales by league tables. Despite their well-known imperfections[3], league tables are influential, and so it matters when, in general, institutions in Wales perform relatively poorly against their comparator institutions across the UK. Some examples are appended at Annex D and the most recent league table, by The Guardian on May 17 2011, confirms the general point (see guardian.co.uk/education/universityguide).

6.4 To help assess the strengths and weaknesses of each HEI in Wales (the Open University, and the University of Wales apart), we offer the following tabular summary (where, in the Widening Access column, green highlighting indicates statistically significant over-performance; and red indicates statistically significant underperformance), acknowledging that some of the judgments are pretty high level generalisations:

[3] See HEFCE, *League tables and their impact on higher education institutions in England*, 2008 (http://www.hefce.ac.uk/pubs/hefce/2008/08_14/)

University	Subject range	Widening Access performance (relative to UK PIs) Benchmark 1 – Lower Socio-economic classes Benchmark 2 – low participation neighbourhoods	Research strength	Sustainability	Any other key points
Cardiff	Extensive in scope and volume	B1 Actual 21.3 B/m 24.0 B2 Actual 6.3 B/m 7.4	Best in Wales – more than 50% of high quality R. Broad range. But not achieving full potential	Fundamentally sound, financially secure	
Swansea	Moderately extensive in scope and volume, notably in humanities, social sciences, science and engineering	B1 Actual 26.8 B/m 30.9 B2 Actual 7.4 B/m 10.7	Some strength,, and new opportunity now with 2nd campus, but still too small relative to many emerging research council expectations	Currently sound financially, but for the moment risks remain around second campus developments	

Aberystwyth	Moderately extensive in scope and volume, notably in science, humanities and social sciences	B1 Actual 29.8 B/m 31.7 B2 Actual 9.2 B/m 11.0	Some strengths, and new opportunity with IBERS, but still too small relative to many emerging research council expectations	Concerns on strategic direction, management and financial control	
Bangor	Moderately extensive, notably in science, humanities and management	B1 Actual 32.3 B/m 33.2 B2 Actual 9.9 B/m 12.3	Some strength, but still too small relative to many emerging research council expectations	Concerns about strategic direction and financial savings required.	
Glyndŵr	Relatively limited in scope and volume, with particular capacity in engineering and technology, and subjects allied to medicine	B1 Actual 46.3 B/m 38.2 B2 Actual 20.6 B/m 14.3	Some strength, but in very restricted areas	Concerns on strategic direction and longer term financial position in light of funding reductions	Probably faces the most competitive local environment of any Welsh HEI, mostly cross-border

Glamorgan	Moderately extensive in scope and volume, notably in management, subjects allied to medicine, and science	B1 Actual 37.7 B/m 36.1 B2 Actual 14.1 B/m 13.1	Some strength, but in limited areas	Fundamentally sound	
UWIC	Moderate scope but volume concentrated in management, science, art and design, subjects allied to medicine, and education	B1 Actual 34.8 B/m 35.2 B2 Actual 10.3 B/m 12.2	Some strength, but in very few areas.	Concerns about strategic direction and longer term financial position In light of funding reductions	Small relative to other “metropolitan” universities, and heavily weighted towards overseas post graduates (25% of total HE students), so arguably not sufficiently addressing the needs of the region.

Newport	Moderate scope but volume concentrated in art and design, education, and management	B1 Actual 39.6 B/m 35.8 B2 Actual 16.6 B/m 12.8	Some strength, but in very few areas	Current financial performance OK, but concerns about future balance of income and costs.	Much of the provision in 2 of the 3 largest subject areas is sub-degree level
SMU	Moderate scope but volume mainly in art and design, management and education	B1 Actual 39.7 B/m 37.6 B2 Actual 13.7 B/m 13.6	Some strength, but in very few areas	Financially very sound	
TSD	Relatively limited scope with volume mainly in humanities, management and education	TUCC B1 Actual 41.8 B/m 36.7 B2 Actual 8.9 B/m 13.2 Lampeter B1 Actual 32.9 B/m 33.1 B2 Actual 10.8 B/m 13.2	Some strength, but in very few areas	Generally sound but the short timescale since the merger means that there is very little evidence yet of the financial performance of the merged institution.	

7 Structural Options for Welsh Universities

7.1 Drawing on the preceding examination of strengths and weaknesses, and applying also the experience in HE and FE represented by the Council, this section briefly outlines a range of structural options for each institution. Turnover figures relate to academic year 2009/10.

7.2 **Cardiff University**: With a turnover of £429m, Cardiff broadly meets all our criteria as currently constituted, but to meet our 22 December 2010 aim to secure at least one world class institution in Wales, it needs to resolve continuing concerns about medical education, and more generally, to show that it is performing at full potential, which implies some need for organisational change. These issues are mainly internal, together with some need for research collaboration to meet new Research Council expectations. It could benefit in some key areas of teaching and research (especially where scale is, or is becoming, an issue) from closer partnership with Swansea – and potentially also neighbouring English universities.

7.3 **Swansea University**: Swansea is potentially strong enough, with a turnover of £159m, to remain independent, and with the ambition of giving Wales a strong enough research university to become a 94 Group candidate. It is debatable whether a merger between Swansea and Trinity Saint David/Swansea Metropolitan University or Swansea with SMU alone, would help these ambitions. It might be better to think of Swansea in strong research and teaching collaborations, not least with Cardiff, and especially in STEM (Engineering, Physics and other physical sciences, Medicine and biological sciences). Merger with Aberystwyth, with a combined turnover of £280m might be a conceivable means of strengthening Swansea, but there is no track record of discussions to this end, and such an arrangement would leave Bangor University isolated.

7.4 **Aberystwyth and Bangor Universities**: Both have recently appointed new Vice-Chancellors. Neither is ideally placed for long-term sustainability, both being of only modest scale in UK terms (Aberystwyth turnover is £121m, Bangor is £125m) and without substantial financial reserves or strong niche positioning to offset the challenges of scale. With our encouragement, and significant financial support, they have been collaborating in research and enterprise and are now looking to develop their relationship further. It would make sense for them to develop a deeper structural relationship in the short term, moving to merger in the medium term. The combined turnover would be £246m. Merger would build on the existing positive collaboration, would extend, or protect, the range of both (in teaching as well as research, where there are potential complementarities) and would take research income above Swansea's level, albeit at the expense of more complex administration, given geography. A straightforward merger between Bangor and Glyndŵr would be challenging, given different traditions and missions and would not, at £169m turnover, address adequately the longer term sustainability challenges for a research intensive institution.

7.5 **Glyndŵr**: The sustainability of Glyndŵr, with a turnover of £44m, looks challenging in the long term and is sub-optimal in terms of provision for NE Wales, where Glyndŵr addresses a particular market segment for which we would wish to see continued provision. There is a range of possible options, all of which have merits and limitations:

- Arguably, were it not for the Wales-England border, merger with nearby Chester would make sense. The institutions have complementary provision and the merger would increase curriculum scope (more humanities and social science subjects). It would, though, still leave a restricted research range and there is the potential complexity of cross-border policy steers, if not also of funding.
- There is much to be said for the establishment of a strong structural relationship with a range of FE Colleges, particularly in terms of extending the reach of the HE curriculum and stronger progression routes. It would also reduce competition between them, but still leave a relatively restricted HE menu which would require further work with Aberystwyth and Bangor (or cross-border) in terms of a regional curriculum offer. The relative scale of the FECs and Glyndŵr also make this option challenging.
- To broaden the range of provision and to achieve significant mass in higher education, a third option would be for provision to be managed by Aberystwyth and Bangor, in a regional group structure, with a combined turnover of £290m (perhaps on the Suffolk model; see http://www.ucs.ac.uk/About/Abouthomepage.aspx). This would offer a fairly full subject range and prospects for broader research delivery/support in NE Wales. This option could be further developed to embrace structural relationships with a range of FE Colleges (a 'community university' model), thereby sustaining provision for the market segment currently addressed by Glyndŵr .

7.6 **University of Glamorgan**: With turnover of £144m, it is of sustainable size for an institution with its mission, and has a good subject range with a strong vocational/professional focus plus some significant research activity. It is still small in terms of major post-92s (e.g. University of the West of England has a turnover of £223 million and University of Plymouth £209 million - 2009/10 figures) and generally does not come out well in league tables (often because of intake and retention variables). If combined with other HEIs in SE Wales, it could offer a more comprehensive subject range, rationalize some provision, and give Wales a major post-92. Its Valleys presence, and UHOVI, suggest the value of a link with UWN. Merger with UWIC as well would deliver a major post-92, and enable significant regional coherence. Glamorgan and UWIC alone would have a turnover of £224m. Merger of Glamorgan, UWIC and Newport would produce an institution with a turnover of £272m, but also with bank borrowings of approximately £103m against a combined net asset base of £148m which might generate challenges in respect of existing bank covenants.

7.7 **University of Wales Institute, Cardiff**: Relative to similar city centre institutions, UWIC (turnover of £80m) is small, with a portfolio not as well

focused as it could be on meeting the needs of its locality. The case previously advanced for merger with Glamorgan was compelling at the time, and would be no less so now: complementarity of provision (e.g. sport, aspects of creative subjects, some professional studies), greater breadth, scope for better deployment of provision across ‘greater Cardiff’ area as well as into Valleys, possibly some campus rationalisation. UWIC is also relatively low in part-time provision, and has a strong emphasis upon overseas students, and so merger with Glamorgan would improve the ‘offer’ within the Cardiff area. UWIC has committed to the proposed University of Wales (UoW) scheme and this also offers potential benefits including greater mass and integration with TSD/SMU whose curricula are well focused on local need. The UoW proposal would, however, need to address the issue of a coherent offer in SE Wales through collaboration with other providers within the region.

7.8 **University of Wales, Newport**: A small institution (turnover of £48m) with limited scope and a major sustainability challenge in the longer term. Its provision could be covered by other institutions elsewhere in the region (unlike the SW Wales case). The most obvious step would be merger with Glamorgan (producing a combined turnover of £192m), in order to consolidate UHOVI and deepen/widen delivery across the valleys, but there could also be advantage in merger with UWIC provided (cf the 2005 proposal to this effect) that this did not simply result in more competition in SE Wales. An extension of this possibility might be to include Newport in the current University of Wales proposals.

7.9 **University of Wales Trinity Saint David and Swansea Metropolitan University**: There is already a clear intention for these to merge and, in doing so, to establish coherent relations with FE Colleges in their area. Nonetheless, the resultant institution would still be small with a turnover of £69m (Trinity Saint David turnover of £32m, Swansea Metropolitan University turnover of £37m). The **UoW/SMU/TSD/UWIC** proposal would create a more significant grouping with a turnover of £165m, strengthening the scope for subject coverage, and for coherence with FE partners.

7.10 **University of Wales**: The University of Wales is essentially a degree awarding body rather than a provider of HE in Wales. It has a strong asset base relative to its size but most of its income derives from validation activity outside Wales which, as recent events have demonstrated, continues to require attention. We have already been asked for advice on a range of matters concerning the UoW and will be submitting further advice shortly. Nevertheless, the brand appears still to have currency, not least to existing holders of UoW awards. We consider that, whatever its future, there is a clear need to ensure its governance is in the hands of people with real interests in the consequences for delivery of HE across Wales, and who can be expected to be alert to, and take care of, the reputational consequences to Welsh HE of risks associated with the management of the ‘Wales brand’. The McCormick review recognizes the potential for UoW to merge with other institutions in Wales and identifies a number of criteria which such a merger should meet:

- A single, overarching governing body responsible and accountable for overseeing and assuring the strategic direction, probity, leadership and academic outcomes of the institution;
- A single management structure that creates one institution;
- A unifying mission and purpose that enhances the student experience and strengthens academic activity;
- A common strategy clearly defining the institution's international and overseas activities;
- A logic that underpins HEFCW's regional strategy.[4]

The proposed merger with TSD, SMU and UWIC could, on the face of it, meet these criteria and offer a number of potential advantages, subject to satisfactory answers on questions relating to the value added, the impact on regional delivery relative to other options, governance and leadership arrangements.

7.11 **Open University**: In this paper, we have taken the view that the Open University is uniquely positioned in the context of sector structure in Wales and we have not included it in our consideration of transforming the structure of the sector. That is not to imply that it does not have a role to play: it does, as we have made clear in, for example, our work on regional strategies. The OU in Wales can make an important contribution to the delivery of a broad curriculum and to employer engagement in Wales, and already makes a major contribution to widening access in Wales. Being part of a much larger UK-wide institution, we have less of a locus in respect of its longer term sustainability, and it has less scope to engage in specific structural re-organisation in Wales.

8 Council Opinion

8.1 We believe that we have shown, on a solid evidence base, that the current structure of higher education in Wales is sub-optimal and does not serve Wales as well as it could. In going further, now, than the view expressed by the Council in its Statement of 22 December 2010, we recognize that we are moving beyond the scope of a fully evidence-based position to an exercise of judgment. Nevertheless, we believe that the available evidence makes our preferred outcome reasonable.

8.2 We were asked to advise <u>what</u> our preferred outcome would be, rather than, for now, to reflect on <u>how</u> to get there. In some cases there is a hierarchy of possible solutions, where viable alternatives to our preferred outcome exist. We have taken account of what we believe could be achieved within our current Corporate Plan period (i.e. by end of 2012-13) in reaching our recommendations. Should it be agreed that our preferred outcomes require a

[4] McCormick J (2011) Achievement and accountability: Report of the independent review of higher education governance in Wales, Welsh Assembly Government, 30

little more time then we would suggest that consideration be given to that possibility before moving to our alternatives.

8.3 **The Council's preferred outcome would be**:

8.3.1 Cardiff University to remain committed to securing a position as a world class research intensive university, while collaborating particularly with Swansea in areas where together they would be more effective on the UK stage, for example via joint REF submissions. Also to work with neighbours to deliver regional coherence, and potentially also to collaborate at a strategic level cross-border, where this strengthens what Cardiff can offer Wales. (In contrast to our reservation, below, over potential cross-border activity in NE Wales, the scale of Cardiff reduces any risk to the Welsh agenda).

8.3.2 Swansea University to maintain its aim of developing as a research intensive university with 1994 Group ambitions, especially with the impetus provided by its new Innovation Campus development, and to build and strengthen some key research and teaching partnerships with Cardiff – especially in STEM and Modern Foreign Languages. We would like Swansea to deepen regional coordination with the new Trinity Saint David/Swansea Metropolitan University structure, whatever form that finally takes.

8.3.3 Aberystwyth and Bangor Universities (given very recent appointments of vice-chancellors) to substantially widen and deepen their strategic partnership (including development towards integrated governance processes), building capacity of sustainable scale in a range of subject areas; and to develop by the end of our Corporate planning period a plan for merger.

8.3.4 Glyndŵr University to develop strong structural relationships with a range of FE Colleges within a group structure led by Aberystwyth and Bangor in order to expand the range of HE provision available in NE Wales, which is currently relatively narrow. This approach would also secure regional coherence.

- Merger of Aberystwyth and Bangor is not a precondition of development towards such a group structure but if it quickly became clear that insufficient progress could be made within our Corporate Planning period, then a plausible alternative approach to the issue of wider provision in NE Wales would be strong structural relationships involving FE Colleges (a 'community university' model), with a strong insistence upon coherent overall regional planning.
- Arguments could be advanced in favour of merger with Chester University, which is geographically close and complementary in provision. There is, in any case, much to be said for closer working in some provision, and in shared services, between 'current' Glyndŵr and Chester, and this might well remain true in future. We are unsure, though, given Glyndŵr's scale, that this outcome would secure adequate and continuing focus upon the Welsh agenda, and this issue would need to be resolved before going in this direction.

8.3.5 University of Glamorgan, University of Wales Institute, Cardiff and University of Wales, Newport to merge, creating a post-92 institution appropriate to the

population of SE Wales, provided this can be secured within our Corporate Plan period. We do not yet have a true 'metropolitan' university in SE Wales, comparable to those in similarly sized city-regions around the UK.

- If not achievable at that speed, we see considerable merit in UWN merging with Glamorgan; and, in that circumstance, arguments also in favour of UWIC merging with the new TSD/SMU structure (with or without UoW – see below); with a clear requirement of joint delivery of regional coherence in South West and South East Wales by the two new institutions.

8.3.6 University of Wales Trinity Saint David and Swansea Metropolitan University to merge as already planned, potentially but not necessarily also with the University of Wales. We would also require this new university to deepen regional coordination with Swansea University.

- If the Glamorgan/UWIC/UWN merger did not proceed, we see arguments in favour of UWIC also merging into this structure.

8.3.7 University of Wales: Like the McCormick Review, we believe that the status quo is unsustainable and further believe that we need an outcome in which the University of Wales' governance demonstrates an overriding concern for the consequences for delivery of HE across Wales, and who is alert to, and takes care of, the reputational consequences to Welsh HE of risks associated with the management of the 'Wales brand', including in respect of validation activities outside Wales. These concerns have been confirmed by recently published QAA reports on these matters. This recommendation is consistent, we believe, with the McCormick review.

- If UWIC does not merge with Glamorgan, and if satisfactory changes to the current 'new UoW' concept can be secured, then UoW should merge with TSD/SMU and UWIC.

8.4 Regional delivery: we committed in June 2010 to development of a richer and more coherent regional aspect to delivery of HE in Wales. The recommendations above are, in our view, consistent with the positive evolution of the progress already made with improving regional delivery.

8.5 Medical education: In the context of such radical restructuring of higher education in Wales, we consider that thought should be given to one 'special case' subject, namely Medicine. It may be appropriate to review the structure of medical education against the background of the emerging new structure for HE as a whole, to ensure that we have the best pattern from the perspectives of maintaining efficient and effective teaching provision, achieving critical mass in research and meeting the needs of Wales.

Annexes:

A History of HE reconfiguration policy

B Record of spending on reconfiguration and collaboration

C Council Statement of 22 December 2010

D Extracts from selected league tables

E Grant capture tables from selected Research Councils

F Subject coverage by institution

History of HE Reconfiguration Policy in Wales

The debate on the size and shape of the HE sector in Wales is not new. HEFCW circular W99/101 HE, published in 1999, provided advice to the newly formed National Assembly for Wales that there was ‘a case for seeing some five or six, general, multi-mission, institutions in Wales’. The case was made in the light of concerns expressed by the Welsh Office in 1993, echoing concerns previously held by the Wales Advisory Body for Local Authority Higher Education (WAB), that there were too many HE institutions in Wales which were too small.

Following submission of that advice, the Education and Lifelong Learning Committee of the National Assembly for Wales commissioned a policy review of higher education which reported in 2001. The wide ranging report recommended, amongst other things, that HEFCW should adopt a more proactive strategic planning role and should implement a revised structure of higher education based on a ‘cluster model’, essentially geographical in nature but with a functional dimension, through which issues of regional delivery, reduction of duplication and critical mass could be addressed.

Reaching Higher, the Welsh Assembly Government’s strategy for higher education published in March 2002, identified reconfiguration and collaboration as key to ensuring a successful and internationally competitive sector for the future, although it focused on function rather than form, advocating a structure based on ‘networks of excellence’. That view was reiterated in the Council’s 2002-03 remit letter and reinforced in concrete terms by the award of additional funding in 2002-03 expressly for reconfiguration and collaboration. In response, the Council established the Reconfiguration and Collaboration Fund, re-launched in 2004, through which additional funds were made available to support restructuring of the sector. Projects supported by the fund are detailed in Annex B.

Against this backdrop, UWIC and the University of Glamorgan announced merger proposals in December 2002. A consultation document on the case for merger emerged in August 2003 but the discussions were terminated by December 2003. The Council commissioned the ELWa Audit Service to produce an independent report on the terminated merger discussions. The report found that ‘at strategic level there was a mutual breakdown in trust and confidence between the two institutions’.

HEFCW also commissioned from Professors John Bull and Sir Ron Cooke an independent review of post-92 higher education in South East Wales, published in Spring 2005. This concluded that a significant opportunity was being missed by the present configuration of institutions. It made proposals for ways forward, and concluded that ‘it is both probable and highly desirable that a single, new

institution would emerge within the next five years from these proposals'. The Assembly Government and the Council welcomed this report, with the then First Minister expressing his expectation that the three institutions of UWIC, Newport and Glamorgan should henceforth 'plan their future together'.

A merger proposal between UWIC and UW Newport was received in March 2005. Council sought a way forward that was consistent with the Cooke/Bull report, and agreed in July 2005 to offer support of £50k to enable the two institutions to develop a case for merger, subject to UWIC and UWN agreement of an acceptable framework for joint strategic planning with the University of Glamorgan. In July 2005, UWIC and UWN declined the Council's offer on the grounds that "this condition will delay access to merger funding in the short term".

In 2008, at the behest of the then Minister for CELLS, a Strategic Collaboration Board for South East Wales was convened. Its members were the vice-chancellors of Glamorgan, Newport and UWIC, and the Director DCELLS, under the chairmanship of Professor (now Sir) Deian Hopkin, then VC of South Bank University. HEFCW had no role in this process. Its purpose was to examine opportunities for joint planning of capital and learning/teaching programmes, shared services, improvements in student services and prospects for easier navigation across institutions by students and staff. The Board's report remains confidential. We understand, however, that it reviewed experience of mergers elsewhere, and reflected on the position of the three SE Wales institutions. It concluded, we further understand, that in the light of differences in institutional visions, missions and strategic directions, and of lessons learnt from other merger cases, and the lack of agreement on the strength of the business case, full scale merger between two or all three was unrealistic at that time. Each HEI apparently felt that any continuing doubt on this question would encourage current and potential staff and students to question the future existence of the individual HEIs. In the same vein, the ideas of joint planning of capital and learning programmes were thought too demanding in governance terms. But collaborative projects could be explored in terms of a joint web site to assist cross-institutional navigation, and in terms of shared services. Other opportunities for collaboration outside the terms of reference of the Board were also identified.

In 2009, the Wales Audit Office published a report on Collaboration between Higher Education Institutions which concluded that 'Although the HEFCW has generally managed the Reconfiguration and Collaboration Fund effectively, there are barriers to further collaboration within the sector' and that 'Some higher education institutions are engaging in successful collaboration projects, but overall there is room for improvement and in some areas there has been only limited progress' In particular, the report drew attention to the lack of

progress in SE Wales. Following its publication, we made the recommended minor changes to our processes.

DCELLS commissioned a further review of higher education, chaired by Professor Merfyn Jones, which reported in 2009. In terms of sector structure, the report drew attention to the strength of attachment to a university by students, staff, alumni and the wider community. While, in the end, agreeing that 'there remains a compelling case for creating and consolidating critical mass, particularly in research and in wider reconfiguration, including merger, where clear outcomes can be identified and achieved', the report was clear that this should be in the context of a clear articulation of strategic outcomes which lie behind the desire to see further merger and reconfiguration. Again, form should follow function.

The Jones review prompted the publication by WAG of For our Future, and by HEFCW of our current corporate strategy (also the For our Future action plan) with a specific target on reconfiguration linking directly to sustainability. The Council then expressed its view even more clearly by the publication of a statement on the future shape of the HE sector in Wales in December 2010, attached as Annex C.

More recently still, the Minister commissioned an independent review of higher education governance in Wales, chaired by John McCormick. The report, published in March 2011, noted (para. 49) that:

'A commitment to, and engagement with, the national policy of collaboration and merger does not conflict with institutional priorities or future institutional need. Neither the obligations of trusteeship within institutions nor institutional priorities should be a bar to commitment to wider national needs and priorities. It is entirely proper that institutional governors should take account of the needs of the future student body, the longer term interests of research and the interests of the wider society in which they operate'.

RECONFIGURATION AND COLLABORATION FUND COMMITMENTS

Partnership	Administrative Lead	Partner Institutions	Total Funding Commitment
Merger of Cardiff University and the University of Wales College of Medicine	Cardiff University	Cardiff University and the University of Wales College of Medicine	£15,000,000
Appraisal of creation of a new University for North Wales	North East Wales Institute	University of Wales, Bangor	£250,000
Appraisal of merger and other options	University of Glamorgan	University of Wales Institute, Cardiff	£250,000
Planning work for rationalisation of provision in law, nursing and initial teacher training; and assessment of scope for further collaboration in the provision of support services	University of Wales, Swansea	Swansea Institute of Higher Education	£150,000
Strategic analysis: collaboration in research and teaching	University of Wales, Aberystwyth	University of Wales, Bangor	£100,000
Collaboration in administrative services	University of Wales, Bangor	Coleg Menai	£38,000

Rationalisation of Archaeology provision	University of Wales, Lampeter	Trinity College Carmarthen	£90,000
Subject Rationalisation between the Swansea University and Swansea Metropolitan University	Swansea University/ Swansea Metropolitan University	Swansea University and Swansea Metropolitan University	£3,770,000
Options appraisal for strategic alliance	Cardiff University	Royal Welsh College of Music and Drama	£179,000
Integration of Merthyr Tydfil College and University of Glamorgan	University of Glamorgan	University of Glamorgan and Merthyr Tydfil College	£242,000
Strategic Alliance between University of Glamorgan and the Royal Welsh College of Music and Drama	University of Glamorgan	University of Glamorgan and Royal Welsh College of Music and Drama	£12,750,000*
Research and Enterprise Partnership between the Aberystwyth and Bangor Universities	Aberystwyth University	Aberystwyth University and Bangor University	£10,949,413
Wales Institute of Cognitive Neuroscience	Bangor University	Bangor University; Cardiff University and Swansea University	£5,173,034
Skillset Screen Academy for Wales	University of Glamorgan	University of Glamorgan; University of Wales, Newport; Cardiff University; Royal Welsh College of Music and	£620,000

		Drama; Swansea Metropolitan University and Coleg Morgannwg	
Wales Institute of Mathematical and Computational Sciences	Swansea University	Cardiff University; Aberystwyth University and Bangor University	£5,021,050
Rationalisation of Chemistry Subject Provision in South Wales	Cardiff University/Swansea University	Cardiff University and Swansea University	£1,205,281
Development of Welsh Medium Provision - Fellowship and Scholarship Schemes	University of Wales	Pan Wales	£2,932,455
Enhancement of the Welsh Medium Teaching Development Centre	University of Wales	Pan Wales	£900,000
Pay Modernisation	Aberystwyth University	Pan Wales	£2,938,037
South West Wales HE Partnership	Swansea University	Swansea University, Swansea Metropolitan University and Trinity College Carmarthen	£7,465,623
Further Development of the Welsh Medium Teaching Development Centre	Trinity College Carmarthen	Pan Wales	£1,310,000
Low Carbon Research Institute	Cardiff University	Bangor University, University of Glamorgan and Swansea University	£5,188,960

Wales Institute of Social and Economic Research, Data and Methods	Cardiff University	Aberystwyth University, Bangor University, University of Glamorgan and Swansea University	£3,400,009
Biosciences and Environment Alliance/IBERS	Aberystwyth University	Bangor University	£6,997,200 revenue £16,500,000 capital
Research Institute of Visual Computing	Bangor University	Aberystwyth University, Cardiff University and Swansea University.	£5,020,522
Merger of Trinity University College, Carmarthen and the University of Wales, Lampeter	Trinity University College, Carmarthen	University of Wales, Lampeter	£14,030,000*
Climate Change Consortium for Wales	Aberystwyth University	Bangor University, Cardiff University and Swansea University.	£4,020,000
High Performance Computing Wales	High Performance Computing Wales	Aberystwyth, Bangor, Cardiff, Glamorgan and Swansea Universities and the University of Wales	£4,975,000
TOTAL			£131,465,584

*includes an element of repayable grant

The Future Shape of the HE Sector in Wales

HEFCW Statement, 22 December 2010

1) The policy of significant reconfiguration of the higher education sector in Wales, which is reflected in our corporate strategy, is not new: it has been the explicit position of the Welsh Assembly Government since 2002, but the underlying concerns about there being too many institutions to ensure sustainability pre-date Reaching Higher. Whilst there has been some progress in this agenda in recent years, with some HE mergers, the Council is of the view that this progress has been too limited. This issue becomes more acute in the light of major pressures on public funding which will form the backdrop for higher education in the UK over the immediate future and which will generate increased sustainability challenges.

2) Against this context, the Council has been considering a range of possible interventions which might be made to encourage swifter progress. It has adopted a specific strategic target relating to reconfiguration and has determined that core funding will be deployed in ways which lend force to the achievement of that target. In addition to funding levers, though, we take the view that there is merit in publishing a more explicit description of the future shape of the sector which we believe is required in order to deliver a sustainable HE system in Wales. In doing so, we are responding to requests from the sector to take the lead in defining reconfiguration expectations.

3) We believe that the publication of this Statement will have the benefit of making clear the nature of our and the Welsh Assembly Government's expectations, which extend beyond simple achievement of the corporate strategy target relating to income. It will also provide a clear basis for dialogue with the sector about structural change and will make it less likely that institutions offer responses to our reconfiguration challenges which fall short of our expectations.

4) We recognise that the publication of too tightly specified a sector 'blueprint' would risk limiting the creativity with which the reconfiguration challenge could be addressed by institutions. We are aware, informally, of possible structural developments which are, perhaps, less obvious than others, but which have potential merit nonetheless.

5) This statement identifies our expectations, to be met by the end of our current corporate strategy period (March 2013). We have aimed to avoid

overspecification, and also not to exclude the scope for potential further structural changes beyond that period. We expect that:

a. the sector should move to a structure of no more than six institutions;

b. the distribution of those institutions should reflect regional needs such that there should be no more than two institutions per region (as we have defined previously), albeit with several delivery locations;

c. each region should have research intensive (in which we will increasingly focus our QR funding in support of sustainable excellence and relevance to Welsh Assembly Government objectives) and strong community/widening access focused provision;

d. no more than two HEIs should have an income below the UK median and, given the higher population density and easier mobility, neither of these should be in south east Wales.

6) We acknowledge that alternative configurations to that proposed above could make sense but consider that the order of magnitude identified, i.e. no more than six institutions, remains a key consideration.

7) In constructing this statement, we wish to make clear our aspiration to secure at least one institution in Wales which is demonstrably world class, indicated perhaps by inclusion in the world top 200 universities. We also wish to make clear that we do not wish to constrain any institution to work only within its regional grouping: pan Wales, pan-UK and international approaches are all necessary to deliver a strong and successful HE system in Wales.

League table performance (selected tables)

1. **THE World University Rankings 2010**

   No Welsh university in top 200 (although 29 UK institutions listed)

2. **QS Top Universities 2010**

   (Previously published via THE before THE changed the methodology for 2010)

   122 – Cardiff (after 21 other UK institutions)

   368 – Bangor

   376 – Swansea

   380 – Aberystwyth

3. The Sunday Times University Guide 2009

Numbers refer to:

Student satisfaction (250)

Heads'/peer assessments (100)

Research quality (200)

A/AS level/higher points (250)

Employment (100)

Firsts / 2:1s awarded (100)

Student / staff ratio (100)

Dropout rate

Total

Welsh HEIs highlighted. SMU explanation in notes.

1 University of Oxford 208 71 148 250 78 91 92 4 943

2 University of Cambridge 206 75 149 250 78 86 87 12 941

3 Imperial College London 148 61 147 243 88 69 98 5 859

4 University College London 166 56 142 225 80 81 100 -1 849

5 University of St Andrews 199 44 136 233 64 84 80 2 842

6 University of Warwick 171 53 140 230 74 80 75 8 830

7 Durham University 180 53 136 228 71 78 68 11 823

8 University of York 192 47 139 215 64 75 76 6 814

9 London School of Economics and Political Science 134 60 148 241 78 76 75 1 813

10 University of Bristol 149 62 136 222 73 82 76 3 803

11 University of Bath 171 50 136 218 80 75 67 5 802

12 ☐ University of Southampton 169 43 136 202 73 75 72 13 783

13 ☐ King's College London 149 52 135 206 79 73 88 1 782

14 ☐ University of Nottingham 166 50 134 203 71 73 73 9 779

15= ☐ Loughborough University 210 36 131 183 68 68 59 23 777

15= ☐ University of Edinburgh 134 51 137 221 73 81 79 1 777

17 ☐ University of Exeter 199 43 131 195 56 79 57 15 776

18 ☐ University of Sheffield 181 43 136 202 66 74 70 -1 771

19 ☐ Lancaster University 184 39 136 192 73 70 73 4 770

20= ☐ University of Leicester 211 34 123 186 68 72 71 0 764

20= ☐ University of Birmingham 171 47 132 200 65 71 67 12 764

22= ☐ University of Glasgow 190 39 129 203 66 73 76 -22 755

22= ☐ University of Sussex 170 34 131 187 66 82 65 20 755

24= ☐ University of Leeds 164 48 136 195 65 74 72 2 754

24= ☐ Newcastle University 175 39 132 201 69 72 67 -2 754

26 ☐ University of Manchester 129 50 141 205 66 69 73 5 739

27 ☐ University of Aberdeen 184 35 129 179 71 68 66 6 737

28 ☐ University of East Anglia 194 36 129 178 65 70 59 5 734

29 ☐ University of Liverpool 157 38 127 192 66 69 82 1 732

30 ☐ Queen Mary University of London 157 39 136 171 74 65 77 10 729

31 ☐ Cardiff University 154 40 134 194 68 67 68 3 727

32 ☐ University of Stirling 179 31 121 162 68 64 68 22 715

33 ☐ University of Surrey 164 30 129 175 76 65 59 13 712

34 ☐ University of Dundee 185 29 127 182 68 66 71 -17 711

35 Royal Holloway University of London 153 39 133 181 55 70 69 9 710

36 University of Reading 167 34 126 170 59 75 60 15 707

37 Aston University Birmingham 158 34 122 182 74 64 60 10 704

38 School of Oriental and African Studies 146 35 130 183 58 73 93 -18 700

39 University of Strathclyde 163 31 123 194 73 71 52 -10 698

40 Keele University 175 29 120 159 59 64 70 15 691

41 University of Kent 173 32 130 157 60 62 58 13 686

42 Queen's University Belfast 153 35 128 176 73 69 66 -15 685

43 Aberystwyth University 198 31 124 152 47 61 57 14 684

44 Goldsmiths University of London 146 35 129 157 45 65 79 11 668

45 Heriot-Watt University 127 28 124 173 75 64 64 9 665

46 University of Essex 163 34 139 149 50 61 73 -9 660

47 University of Hull 187 29 118 140 65 57 53 6 656

48 University of Buckingham 228 15 0 125 78 47 100 57 650

49 Brunel University 135 32 116 159 64 65 56 21 648

50 Oxford Brookes University 168 28 110 149 63 66 54 6 644

51 City University 124 33 124 156 77 66 56 6 642

52= Swansea University 167 29 122 148 45 50 68 -1 628

52= University of Bradford 156 23 117 133 69 58 67 5 628

54 The Robert Gordon University 164 20 77 163 85 55 56 0 620

55 University of Ulster 165 25 124 131 58 61 63 -11 616

56 Harper Adams University College 220 13 24 148 81 56 46 27 614

57= University of Brighton 154 25 118 136 57 58 50 8 607

57= Nottingham Trent University 151 26 108 137 70 56 57 3 607

57= De Montfort University 167 23 116 122 67 51 59 1 607

60 University of Portsmouth 174 24 112 134 47 52 53 3 599

61 University of Plymouth 151 25 109 132 51 61 62 2 593

62 Bangor University 171 27 121 138 44 56 53 -20 590

63 Glasgow Caledonian University 159 19 75 162 60 67 48 -10 580

64= Edinburgh Napier University 152 21 69 144 72 62 55 3 578

64= Sheffield Hallam University 134 25 102 131 60 61 55 9 578

66 University of the Arts London 90 37 125 158 49 62 46 10 577

67 University of the West of England 158 22 110 135 53 63 52 -17 576

68= Northumbria University 158 23 80 143 72 54 49 -5 575

68= University of Central Lancashire 167 20 98 134 58 50 49 -1 575

68= Bournemouth University 149 23 82 142 69 57 48 5 575

71 University of Hertfordshire 156 20 90 120 58 47 69 10 571

72 Kingston University 138 22 102 117 54 60 52 15 561

73 University of Salford 138 25 118 123 56 55 54 -11 558

74 University of Lincoln 173 16 71 130 57 57 44 8 557

75 University of Huddersfield 163 19 79 128 56 52 61 -2 556

76= University of Teesside 182 16 50 125 56 52 52 17 549

76= Bath Spa University 170 21 47 142 41 68 46 14 549

78 Manchester Metropolitan University 136 26 108 131 52 57 51 -14 546

79 Coventry University 143 19 69 138 61 61 52 0 545

80 Queen Margaret University Edinburgh 157 21 34 159 67 65 50 -9 544

81 University of Abertay Dundee 157 17 46 137 52 48 51 33 540

82 Birmingham City University 144 20 58 127 68 57 60 1 537

83= University of Chichester 196 18 24 113 53 49 55 19 528

83= University of Chester 157 18 44 132 63 55 55 6 528

85= University College Falmouth 166 26 28 132 46 59 48 16 520

85= University of Wales Institute Cardiff 160 19 70 126 55 52 50 -13 520

87 University of Sunderland 174 15 70 110 56 50 60 -16 519

88 University of Gloucestershire 154 16 43 115 51 56 61 22 518

89= Liverpool John Moores University 150 22 81 119 48 46 51 2 517

89= University of Westminster 109 22 111 123 42 52 61 -2 517

91= Canterbury Christ Church University 149 22 45 117 64 50 55 12 512

91= University of Greenwich 170 15 71 104 57 45 44 6 512

93= Edge Hill University 172 17 37 122 65 46 50 1 511

93= York St John University 155 20 17 143 51 53 50 22 511

95 Staffordshire University 156 19 40 113 68 53 57 3 509

96 University of Winchester 157 17 54 127 45 56 58 -10 503

97 Leeds Metropolitan University 111 21 77 127 62 53 47 3 500

98 University of Wales Lampeter 169 17 53 123 35 53 68 -22 496

99 University of Glamorgan 144 18 77 125 48 52 55 -23 495

100 University of Northampton 162 17 42 115 50 54 49 4 493

101 Roehampton University 131 25 82 125 52 51 54 -29 491

102 University of Bedfordshire 154 17 52 107 54 48 64 -10 485

103 St Mary's University College Twickenham 156 18 22 122 67 59 44 -6 482

104 University of Cumbria 140 16 31 125 65 49 67 -14 479

105 Newman University College Birmingham 161 13 19 106 76 52 55 -10 472

106 Thames Valley University 123 12 42 95 52 50 82 -4 453

107 University of East London 111 15 84 94 43 44 46 14 452

108 Trinity University College 170 19 0 113 63 47 59 -18 451

109 University of Wales Newport 161 16 30 110 54 55 39 -14 450

110 University for the Creative Arts 103 43 24 121 40 51 44 22 447

111 Anglia Ruskin University 121 16 52 126 54 56 51 -29 446

112 University of Derby 153 19 24 114 52 47 53 -17 445

113 Glyndwr University 159 9 21 97 67 51 51 -13 441

114 Leeds Trinity & All Saints 148 16 23 112 61 49 44 -12 440

115 London South Bank University 140 14 56 88 56 54 37 -10 435

116 University of Worcester 148 14 19 116 59 48 50 -21 434

117 Middlesex University 105 21 82 95 46 51 43 -14 428

118 University College Plymouth St Mark & St John 159 17 14 107 58 47 43 -17 426

119 Buckinghamshire New University 122 16 21 103 39 46 49 25 421

120 University of Bolton 133 12 44 102 46 53 53 -26 417

121 University College Birmingham 165 17 0 110 43 42 38 0 415

122 Southampton Solent University 134 13 19 104 45 46 47 -6 400

Liverpool Hope, London Metropolitan, Swansea Metropolitan and Wolverhampton universities are excluded from the guide after withholding data from publication in The Sunday Times.

Annex D

Complete University Guide, 2011 edition

Column	Title	Explanation
A	CUG Rank 2011	
B	CUG Rank 2010	
C	University Name	
D	Entry Standards	The average UCAS tariff score of new students under 21 years of age entering the University
E	Student Satisfaction	A guide to the quality of teaching you can expect from the University, based on the annual National Student Survey.
F	Research Assessment	The average quality of the research undertaken in the University – a guide to how advanced the faculties are in their respective fields.
G	Graduate Prospects	A guide to the employability of graduates on completion of their courses at the University.
H	Student-Staff Ratio	The average staffing levels at the University – a guide to how much face time and support you may receive from teaching staff.
I	Academic Services Spend	A guide to how much the University spends on supporting services such as libraries, labs and IT.
J	Facilities Spend	A guide to how much the University spends on supporting facilities such as
K	Good Honours	The percentage of graduates achieving a first or upper second class
L	Degree Completion	The proportion of students expected to successfully complete their
M	Overall Score	The total score calculated by our independent and trusted methodology

A	B	C	D	E	F	G	H	I	J	K	L	M
1	2	Cambridge	559	4.1	2.98	85.5	11.7	2,013	690	88.3	99%	1000
2	1	Oxford	536	4.2	2.96	85.0	10.8	2,768	293	91.2	98%	992
3	3	Imperial College London	519	3.8	2.94	86.7	10.9	3,089	681	76.2	91%	940
4	5	London School of Economics	513	3.9	2.96	84.1	11.8	1,905	376	79.0	96%	928
5	4	Durham	487	4.0	2.72	80.4	15.3	1,233	840	79.4	97%	890
6	6	St Andrews	485	4.1	2.72	76.3	13.3	1,463	427	86.7	94%	854
7	9	University College London	477	4.0	2.84	81.1	9.7	1,743	220	83.2	95%	842
8	7	Warwick	480	4.0	2.80	72.5	14.1	1,456	430	80.7	96%	822
9	8	Lancaster	407	4.0	2.71	71.8	13.8	1,167	547	73.6	94%	820
10	12	Bath	459	4.0	2.71	77.9	16.1	1,113	452	76.6	96%	800
11	16	Bristol	467	3.9	2.72	77.7	13.5	1,622	343	80.8	96%	794
12	10	York	437	4.1	2.78	68.2	14.9	1,203	527	75.6	95%	790
13	11	Edinburgh	442	3.8	2.75	72.4	14.4	1,713	449	81.3	93%	782
14	14	Southampton	427	3.9	2.72	70.8	13.6	1,347	459	75.3	93%	779

A	B	C	D	E	F	G	H	I	J	K	L	M
15	24	Exeter	439	4.1	2.62	70.3	19.0	1,094	471	82.8	96%	768
16	13	King's College London	447	3.9	2.69	82.6	12.0	1,492	329	75.3	94%	758
17	18	Nottingham	428	3.9	2.67	77.9	14.2	1,037	424	73.0	95%	753
18	15	SOAS	423	3.9	2.60	68.7	11.1	1,593	222	75.0	87%	751
19	21	Loughborough	390	4.1	2.62	69.2	17.1	899	525	69.6	89%	749
19	19	Sussex	380	4.1	2.61	69.3	16.1	1,001	355	82.7	92%	749
21	26	Glasgow	408	4.0	2.59	72.1	14.5	1,264	599	73.7	87%	748
22	23	Birmingham	421	4.0	2.64	71.8	15.4	1,393	436	72.9	94%	742
23	22	Leicester	399	4.1	2.45	71.5	14.7	1,260	506	66.8	93%	740
24	29	Newcastle	410	4.0	2.63	75.4	15.3	1,202	423	75.5	94%	738
25	17	Aston	370	3.9	2.43	74.8	17.1	954	634	66.0	92%	735
26	25	Sheffield	426	4.0	2.72	73.6	14.9	1,081	357	73.1	94%	729
27	28	East Anglia	386	4.1	2.58	66.1	14.9	1,091	459	69.6	90%	728
28	33	Surrey	388	3.9	2.58	76.4	19.0	1,105	457	66.0	92%	715
29	31	Manchester	422	3.8	2.82	70.4	15.4	1,219	456	70.6	94%	714

A	B	C	D	E	F	G	H	I	J	K	L	M
30	32	Liverpool	401	3.9	2.54	70.3	13.2	1,575	352	71.5	91%	712
31	35	Queen's, Belfast	362	3.9	2.56	69.4	14.8	1,174	610	71.8	85%	710
32	27	Leeds	408	3.9	2.72	65.8	14.9	855	483	76.7	92%	702
33	30	Royal Holloway	381	4.0	2.67	63.1	15.7	964	402	68.8	92%	693
34	38	Kent	329	4.0	2.60	67.3	14.4	821	378	61.9	89%	684
34	40	Reading	370	4.0	2.53	66.3	15.5	922	293	67.3	91%	684
36	39	Queen Mary	387	4.0	2.73	71.7	13.6	1,049	445	64.4	89%	683
37	41	Cardiff	406	3.9	2.69	73.6	15.0	1,040	281	68.5	93%	672
38	37	Essex	307	4.0	2.77	58.6	15.6	913	507	59.3	87%	668
38	34	Heriot-Watt	335	3.9	2.48	68.8	19.1	945	529	68.0	85%	668
40	35	Strathclyde	394	3.9	2.45	73.0	18.0	1,226	298	76.2	83%	665
41	47	City	361	3.9	2.48	70.6	17.6	1,105	382	64.5	88%	646
42	20	Buckingham	273	4.4		87.5	8.9	571	295	43.6	91%	639
43	45	Dundee	353	4.0	2.54	68.9	14.3	1,039	286	68.5	82%	628
44	43	Keele	310	4.0	2.41	67.5	14.5	753	368	61.6	90%	619

A	B	C	D	E	F	G	H	I	J	K	L	M
45	52	Stirling	305	4.0	2.41	66.2	19.3	846	257	63.6	87%	613
46	44	Aberdeen	332	4.0	2.57	69.4	15.8	977	261	67.4	81%	604
46	50	Oxford Brookes	314	3.9	2.20	62.0	18.1	749	449	67.1	89%	604
48	41	Hertfordshire	244	3.9	2.40	59.7	18.5	650	822	62.1	84%	597
49	47	Aberystwyth	298	4.1	2.48	55.1	18.1	871	367	58.5	86%	596
50	46	Brunel	325	3.8	2.32	59.3	20.2	919	550	65.7	88%	594
51	51	Robert Gordon	295	3.9	2.06	76.7	19.0	939	302	60.2	82%	575
52	54	Ulster	266	3.8	2.48	53.9	17.0	1,008	404	60.4	84%	572
53	65	Plymouth	297	3.8	2.18	64.3	16.4	850	326	61.4	85%	560
54	60	Swansea	314	3.9	2.43	60.3	16.5	826	288	57.7	89%	559
55	49	Nottingham Trent	287	3.8	2.16	60.6	19.7	810	500	54.8	84%	557
56	53	Chichester	290	4.0	1.96	54.4	16.6	704	410	54.0	89%	555
57	57	Goldsmiths College	327	3.8	2.58	53.8	17.6	680	189	66.5	83%	551
58	67	Huddersfield	273	3.9	2.10	69.5	18.4	994	296	56.1	78%	548
59	70	University of the Arts, London	276	3.6	2.49	53.1	20.2	909	164	64.8	89%	545

A	B	C	D	E	F	G	H	I	J	K	L	M
60	64	Northumbria	300	3.9	2.15	68.0	20.3	853	288	58.6	82%	539
61	68	West of England, Bristol	278	3.8	2.20	61.4	20.7	776	414	62.2	82%	538
62	55	Bournemouth	297	3.8	2.18	61.1	23.6	986	210	60.9	87%	534
62	56	Hull	309	4.0	2.37	64.6	20.1	835	321	52.0	83%	534
62	68	Sheffield Hallam	289	3.8	2.05	61.8	19.8	744	239	61.6	84%	534
65	72	Central Lancashire	260	3.9	1.96	59.6	18.4	1,010	491	52.8	81%	530
66	58	Birmingham City	263	3.8	2.31	67.7	20.9	846	571	53.7	79%	526
67	71	Lincoln	289	4.0	1.90	55.9	19.7	812	263	57.7	86%	525
68	73	Brighton	290	3.9	2.37	55.5	18.8	625	315	61.4	83%	524
68	59	UWIC, Cardiff	267	3.9	1.88	55.3	20.7	846	419	55.3	85%	524
70	76	Winchester	280	3.9	2.16	54.0	17.7	611	285	60.5	84%	519
71	97	Middlesex	207	3.8	2.18	57.8	21.0	1,640	446	55.8	72%	517
72	75	Coventry	298	3.8	1.85	59.9	15.7	747	303	61.4	78%	514
73	61	Bradford	268	3.9	2.34	69.4	17.5	857	314	57.5	79%	513
73	87	Roehampton	259	3.8	2.20	59.9	18.8	1,069	253	54.7	82%	513

A	B	C	D	E	F	G	H	I	J	K	L	M
75	62	Gloucestershire	264	3.9	1.72	57.8	20.6	907	317	63.0	84%	510
76	79	Glasgow Caledonian	302	3.9	2.01	57.3	20.9	1,025	156	68.4	79%	504
77	94	Westminster	273	3.7	2.23	55.1	17.1	835	254	56.1	80%	502
78	63	Bangor	288	4.0	2.43	59.7	20.7	742	213	57.1	81%	498
79	109	University for the Creative Arts	269	3.6	1.90	50.8	21.6	1,179	343	53.3	85%	494
80	81	Chester	273	3.9	1.74	63.4	17.2	696	259	57.9	79%	489
81	65	De Montfort	259	3.9	2.32	52.8	17.5	773	247	49.8	82%	488
81	89	Portsmouth	283	3.9	2.24	56.7	20.5	923	195	51.4	84%	488
83	86	Glamorgan	279	3.9	2.04	54.3	20.2	898	344	57.6	74%	485
84	74	Edinburgh Napier	296	3.8	1.83	69.3	21.6	879	188	61.3	76%	484
85	83	Bath Spa	293	3.8	1.89	46.5	21.1	546	222	69.0	89%	481
86	81	Cumbria	263	3.8	1.23	66.2	15.3	1,078	246	55.8	85%	474
87	77	Queen Margaret	309	3.9	1.37	61.8	21.7	907	132	68.7	81%	469
88	84	Kingston	243	3.8	2.04	52.3	19.9	724	358	61.9	80%	468
89	89	University of Wales, Newport	252	3.9	2.42	54.5	22.5	592	420	49.3	80%	467

A	B	C	D	E	F	G	H	I	J	K	L	M
90	105	Teesside	271	4.0	1.99	61.9	19.5	820	268	52.6	78%	466
91	93	Sunderland	246	3.9	1.86	54.8	15.8	637	362	49.8	79%	465
92	-	Trinity Saint David	251	3.9	2.11	59.7	18.7	719	392	48.8	80%	463
93	89	Manchester Metropolitan	271	3.7	2.16	57.1	20.6	809	276	57.0	79%	462
93	95	West London	220	3.7	1.67	52.8	14.2	1,194	397	50.2	72%	462
95	98	Abertay Dundee	252	3.9	1.83	57.7	19.4	921	349	51.0	74%	460
95	85	Leeds Metropolitan	267	3.8	2.05	55.5	20.6	611	340	52.9	83%	460
97	96	Salford	280	3.8	2.36	55.1	23.8	664	267	55.3	86%	459
98	88	Edge Hill	260	4.0	1.50	63.2	18.5	951	153	51.1	79%	453
99	80	Staffordshire	241	3.9	1.62	60.7	21.7	749	349	52.4	80%	452
100	106	Canterbury Christ Church	247	3.8	1.79	63.3	18.6	692	227	54.5	84%	447
101	102	Liverpool John Moores	263	3.8	2.15	50.5	20.9	892	227	59.2	81%	442
102	78	York St John	282	3.9	1.40	51.8	21.2	840	315	58.3	82%	439
103	101	Bedfordshire	187	3.8	2.09	61.2	10.7	477	572	44.4	76%	438
104	92	Glyndwr	231	3.9	1.69	65.5	22.5	1,006	396	49.4	76%	430

Annex D

A	B	C	D	E	F	G	H	I	J	K	L	M
105	100	Northampton	238	3.9	1.69	52.9	22.9	883	187	60.9	83%	429
106	102	Worcester	271	3.9	1.54	60.8	21.9	710	126	54.4	84%	421
107	108	Buckinghamshire New	212	3.7	1.67	48.8	22.3	671	636	49.3	82%	416
108	104	Derby	250	3.9	1.96	52.3	20.5	1,053	234	50.1	73%	414
109	110	Greenwich	215	4.0	1.90	54.7	23.3	795	339	46.7	80%	413
110	106	Anglia Ruskin	254	3.7	2.07	55.5	22.7	745	198	56.9	82%	412
111	111	Southampton Solent	266	3.9	1.49	46.2	21.5	697	345	42.7	74%	384
112	-	West of Scotland	241	3.9	1.84	58.3	20.1	1,062	142	43.1	68%	362
113	113	East London	200	3.7	2.24	48.6	23.3	719	246	44.4	75%	335
114	112	Bolton	222	3.9	1.75	45.4	20.4	367	223	45.7	66%	301
115	115	London Metropolitan	221	3.6	1.84	45.5	19.7	739	150	49.8	68%	296

Research Council Awards

1. Arts and Humanities Research Council

Value of Awards by Strategic & Responsive Modes

Rank	University	Strategic	Responsive	Total
1	Oxford	766	2,050	2,816
2	UCL	1,080	1,315	2,395
3	Manchester	645	1,701	2,346
4	Cambridge	-	2,173	2,173
5	Bristol	406	1,411	1,817
6	Glasgow	195	1,455	1,650
7	Leeds	623	894	1,517
8	Edinburgh	251	1,063	1,314
9	Warwick	254	1,042	1,296
10	Reading	281	863	1,144
11	UWE	53	1,059	1,112
12	Sheffield	97	964	1,061
13	Royal Holloway	70	986	1,056

Rank	University	Strategic	Responsive	Total
14	QMW	292	680	972
15	Birmingham	-	952	952
16	Exeter	-	950	950
17	Liverpool	186	742	928
18	Cardiff	444	430	874
19	Essex	-	730	730
20	Strathclyde	537	151	688
21	Nottingham Trent	661	-	661
22	Leicester	497	128	625
23	Portsmouth	-	598	598
24	Bath	531	-	531
25	Kent	427	58	485
26	King's College London	121	280	401
27	Bangor	349	29	378
28	Derby	358	-	358
29	Coventry	-	296	296

Rank	University	Strategic	Responsive	Total
30	Soton	80	215	295
31	Imperial	270	-	270
32	Oxford Brookes	-	265	265
33	Open	-	256	256
34	Bradford	244	-	244
35	Courtauld	240	-	240
36	The National Archives	234	-	234
37	LSE	-	217	217
38	UEA	-	205	205
39	London Met	-	192	192
40	Newcastle	-	191	191
41	University of the Arts London	81	100	181
42	Sussex	91	83	174
43	Aberdeen	-	164	164
44	Northampton	-	160	160
45	Queen's Belfast	117	29	146

Annex E

Rank	University	Strategic	Responsive	Total
46	Lancaster	79	65	144
47	Middlesex	-	133	133
48	Stirling	-	131	131
48	Durham	-	131	131
50	British Museum	-	130	130
51	Sunderland	-	122	122
52	Northumbria	-	121	121
53	Plymouth	-	119	119
54	Nottingham	-	115	115
55	Salford	-	89	89
56	Westminster	-	69	69
57	Anglia Ruskin	-	67	67
58	Aberystwyth	-	62	62
59	SOAS	61	-	61
60	Sheffield Hallam	-	59	59
61	Central Lancashire	-	57	57

Rank	University	Strategic	Responsive	Total
61	Huddersfield	-	57	57
61	Kingston	-	57	57
61	Manchester Met	-	57	57
65	Roehampton	-	50	50
66	St Andrew's	-	48	48
66	Swansea	-	48	48
68	York	-	47	47
69	Leeds Met	-	40	40
69	Glamorgan	-	40	40
71	Bath Spa	-	31	31
72	Goldsmiths	-	27	27
73	Birkbeck	-	22	22
74	Hull	-	21	21
74	Royal College of Art	-	21	21
76	Tate	-	18	18
77	Central school of Speech & Drama	-	16	16

2. Biotechnology and Biological Sciences Research Council 2009/10

Grant Spend by Research Organisation (Top 40). Source: BBSRC

Research Organisation	BBSRC grant spend 2009/10 (£K)	Rank
The University of Manchester	17,905	1
University of Cambridge 1	13,686	2
University of Nottingham	13,528	3
Imperial College London 2	11,277	4
University of Edinburgh	11,068	5
University of Oxford 3	9,507	6
University of Glasgow	8,611	7
University College London 4	8,073	8
University of Bristol	8,040	9
Newcastle University	7,663	10
John Innes Centre	7,002	11
University of Warwick	6,479	12
University of Leeds	5,795	13
Rothamsted Research	5,669	14
University of Sheffield	5,017	15
University of Liverpool 5	4,879	16
Institute For Animal Health	4,574	17
University of Birmingham	4,525	18
University of York	4,158	19
University of Dundee	4,146	20
University of Aberdeen	3,754	21
King's College London	3,657	22

Annex E

Research Organisation	**BBSRC grant spend 2009/10 (£K)**	**Rank**
University of East Anglia	3,526	23
University of Leicester	2,556	24
Cardiff University	2,449	25
University of Southampton	2,149	26
University of Exeter	2,111	27
Durham University	2,067	28
Aberystwyth University	2,059	29
University of Sussex	2,045	30
University of St Andrews	1,841	31
University of Surrey	1,618	32
Royal Veterinary College	1,589	33
Queen Mary, University of London	1,549	34
Babraham Institute	1,480	35
EMBL European Bioinformatics Institute	1,451	36
University of Kent	1,449	37
University of Reading	1,291	38
Institute of Food Research	1,085	39
University of Bath	1,018	40

3. **Engineering and Physical Sciences Research Council**

Recently awarded and completed grants awaiting financial reconciliation as of Nov 10 (EPSRC).

Organisation Name	Number of Grants	Value (£)	Rank
Imperial College London	383	299,018,399	1
University of Cambridge	282	244,329,427	2
University College London	253	190,180,656	3
University of Oxford	313	185,031,874	4
The University of Manchester	224	179,380,931	5
University of Southampton	196	172,913,647	6
University of Sheffield	188	131,935,248	7
University of Nottingham	185	130,516,550	8
University of Edinburgh	164	125,391,872	9
University of Leeds	161	124,083,803	10
University of Warwick	170	119,543,069	11
University of Bristol	165	107,850,676	12
Loughborough University	98	103,980,241	13
University of Strathclyde	123	96,204,980	14
University of Birmingham	128	95,584,328	15
University of Glasgow	118	83,895,671	16
Newcastle University	101	81,976,092	17
University of Bath	102	66,522,362	18
Durham University	109	65,290,401	19
University of Liverpool	96	62,437,597	20
Heriot-Watt University	96	61,683,852	21
University of Surrey	79	55,363,918	22
Queen's University of Belfast	75	51,074,070	23
Cranfield University	57	49,934,446	24

Organisation Name	Number of Grants	Value (£)	Rank
University of St Andrews	86	47,539,692	25
Cardiff University	79	43,726,802	26
University of York	82	38,265,878	27
Queen Mary, University of London	77	37,949,319	28
Swansea University	58	33,603,708	29
Lancaster University	65	30,712,748	30
Brunel University	48	26,537,684	31
University of Aberdeen	35	25,745,911	32
University of Exeter	54	24,242,029	33
King's College London	57	21,218,006	34
University of Reading	57	20,901,518	35
University of Salford	32	20,068,689	36
University of Dundee	39	16,457,120	37
Aston University	23	13,794,995	38
University of Sussex	33	13,068,541	39
University of Leicester	42	12,461,578	40
University of East Anglia	43	12,344,579	41
Royal Holloway, Univ of London	29	10,381,932	42
University of Kent	36	9,752,954	43
STFC - Laboratories	21	9,579,939	44
University of Essex	26	8,189,065	45
University of Hull	26	8,056,699	46
Open University	29	7,943,566	47
University of Bradford	26	7,874,701	48
University of the West of England	23	6,771,792	49
City University	30	6,514,225	50

4. Economic and Social Research Council

Institutional ranking based on ESRC income in 2009/10 (Source: ESRC).

Research 2009 10	£000's	Rank
University of Essex	12,179	1
Institute of Education	6,752	2
University of Oxford	6,213	3
The University of Manchester	5,940	4
University of Cambridge	5,767	5
London School of Economics & Pol Sci	5,500	6
University College London	5,112	7
Cardiff University	4,895	8
University of Edinburgh	4,511	9
University of Bristol	3,936	10
University of Southampton	3,746	11
University of Warwick	3,206	12
Institute for Fiscal Studies	2,882	13
University of Exeter	2,539	14
University of Glasgow	2,403	15
University of Leeds	2,365	16
University of Sheffield	2,343	17
Lancaster University	2,314	18
Newcastle University	2,258	19
University of Nottingham	2,198	20
University of Birmingham	2,103	21
University of East Anglia	2,065	22
University of Sussex	1,993	23
University of Surrey	1,967	24

Annex E

Research 2009 10	£000's	Rank
University of York	1,903	25
King's College London	1,892	26
Bangor University	1,806	27
Imperial College London	1,695	28
Queen's University of Belfast	1,571	29
London Sch of Hygiene and Trop Medicine	1,426	30
Durham University	1,344	31
University of Aberdeen	1,207	32
Institute of Development Studies	1,191	33
Open University	1,174	34
University of Reading	1,048	35
Loughborough University	972	36
University of Stirling	958	37
University of St Andrews	943	38
University of Strathclyde	866	39
Royal Holloway, Univ of London	794	40
Birkbeck College	766	41
Goldsmiths College	713	42
City University	658	43
University of Plymouth	650	44
Brunel University	650	45
Oxford Brookes University	641	46
University of Kent	637	47
London Business School	508	48
University of Liverpool	404	49
School of Oriental & African Studies	392	50

5. Medical Research Council

Grants, fellowships, partnerships & contributions and studentships in the 2009/2010 financial year (£100k and above).

Source MRC website (April 2011).

Research Organisation	Amount Received in 2009/10 (k)	Rank
University College London 1	42,950	1
University of Oxford	33,320	2
University of Cambridge	25,390	3
Imperial College London	22,930	4
King's College London 2	22,070	5
University of Edinburgh	21,120	6
The University of Manchester	11,390	7
University of Bristol	10,330	8
Cardiff University	8,980	9
University of Birmingham	8,840	10
Newcastle University	7,790	11
University of Nottingham	7,720	12
Queen Mary	6,040	13
University of Dundee	5,600	14
National Institute of Biological Standards	5,470	15
University of Sheffield	5,340	16
University of Glasgow	5,310	17
University of Sussex	4,990	18
University of Leicester	4,330	19
University of Leeds	4,250	20
University of Liverpool	3,860	21

Research Organisation	Amount Received in 2009/10 (k)	Rank
London School of Hygiene & Tropical Medicine	3,640	22
University of Southampton	3,090	23
University of Aberdeen	3,030	24
The Babraham Institute	2,700	25
Health Protection Agency	2,680	26
University of Warwick	2,470	27
Wellcome Trust Sanger Institute	2,150	28
University of York	2,030	29
University of Bath	1,730	30
Queen's University Belfast	1,710	31
Institute of Cancer Research	1,680	32
University of Reading	1,640	33
University of East Anglia	1,500	34
Birkbeck College, University of London	1,230	35
School of Pharmacy, University of London	970	36
University of Keele	670	37
University of Plymouth	650	38
University of St Andrews	590	39
Cancer Research UK	580	40
St George's, University of London	520	41
The Beatson Institute for Cancer Research	400	42

Research Organisation	Amount Received in 2009/10 (k)	Rank
University of Strathclyde	380	43
University of Kent	360	44
Bangor University	320	45
City University, London	290	46
Swansea University	290	47
Oxford Radcliffe NHS Trust	250	48
Royal Veterinary College	250	49
University of Durham	250	50
Nuffield Foundation	230	51
University of Lancaster	220	52
Uni Hospitals of Leicester NHS Trust	190	53
University of Exeter	180	54
Liverpool School of Tropical Medicine	150	55
Brunel University	140	56
University of Hull	140	57
Loughborough University	130	58
Coventry University	120	59
University of the West of England	110	60
The Daphne Jackson Trust	100	61

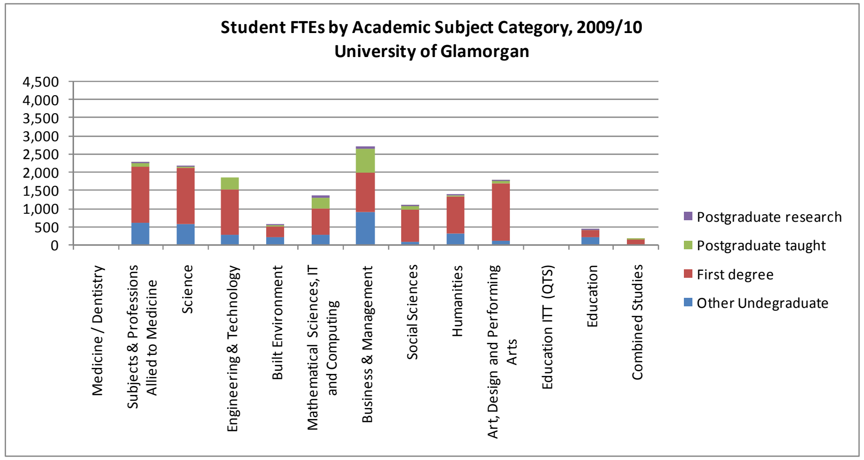
6. Natural Environment Research Council

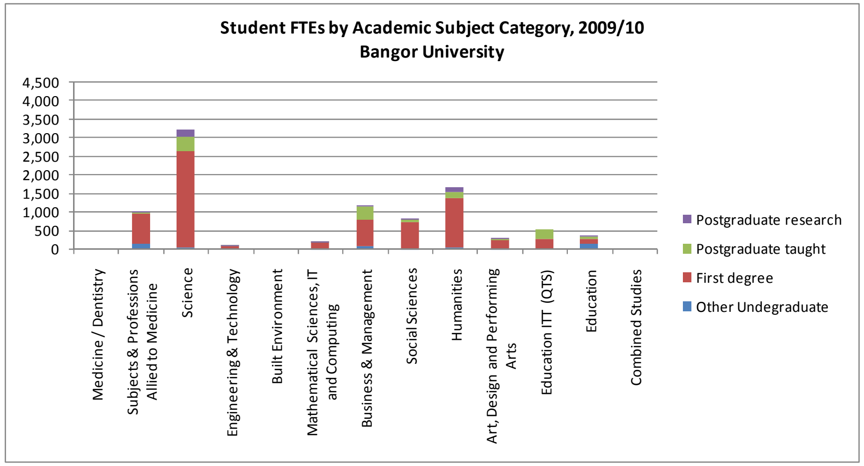
Ranking of research organisations (top 40) based on value of live NERC grants (source NERC website April 2011).

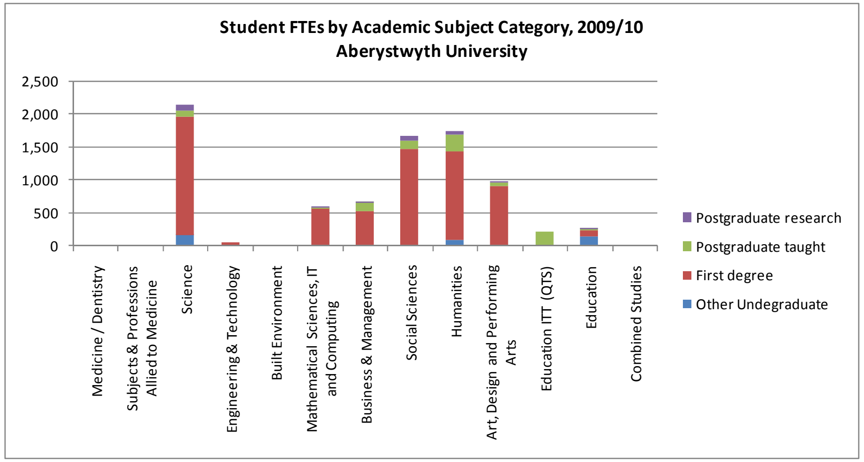
Institution	Number	Value UK £	Rank
Imperial College London	86	£34,775,293	1
University of Leeds	112	£26,303,146	2
University of Oxford	100	£24,626,614	3
University of Edinburgh	91	£22,010,617	4
University of Bristol	94	£21,033,997	5
University of Cambridge	69	£20,695,223	6
University of Reading	65	£18,202,147	7
University of Southampton	72	£18,010,611	8
University of East Anglia	75	£17,045,983	9
The University of Manchester	58	£16,415,816	10
NERC British Antarctic Survey	37	£12,347,042	11
University of Sheffield	52	£11,592,932	12
University College London	57	£11,575,822	13
University of Exeter	56	£10,690,276	14
NERC Centre for Ecology and Hydrology	45	£10,071,828	15
University of Aberdeen	45	£9,790,904	16
National Oceanography Centre	43	£9,721,372	17
University of Liverpool	48	£9,468,432	18
University of Birmingham	41	£8,661,444	19
Newcastle University	45	£7,661,286	20
University of York	47	£7,286,145	21
University of St Andrews	38	£7,243,289	22

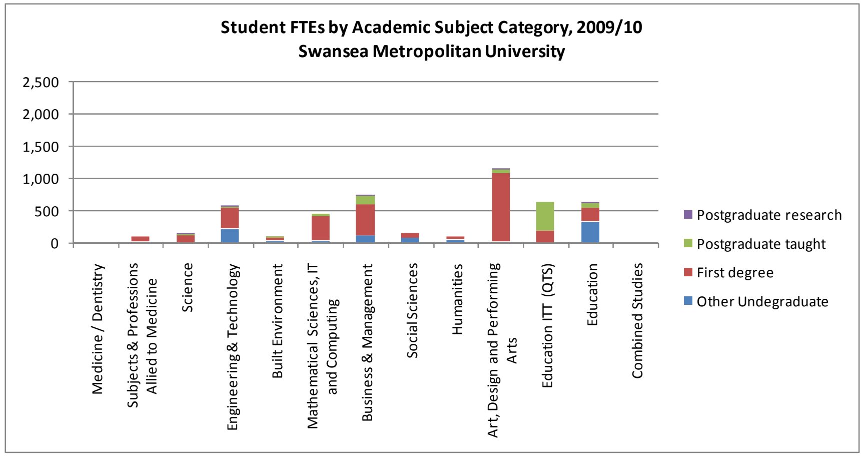
Institution	Number	Value UK £	Rank
Durham University	40	£6,528,004	23
Lancaster University	42	£6,288,498	24
Bangor University	31	£5,832,707	25
University of Leicester	43	£5,464,844	26
Royal Holloway, Univ of London	24	£5,044,706	27
University of Glasgow	29	£4,650,775	28
Cardiff University	35	£4,280,322	29
Scottish Association For Marine Science	27	£4,205,493	30
University of Plymouth	27	£4,086,734	31
Plymouth Marine Laboratory	19	£4,043,925	32
Open University	24	£3,932,190	33
University of Warwick	17	£3,688,800	34
NERC British Geological Survey	26	£3,597,711	35
Queen Mary, University of London	22	£3,382,770	36
University of Essex	15	£3,037,310	37
The Natural History Museum	15	£2,643,026	38
Swansea University	17	£2,629,069	39
University of Nottingham	21	£2,430,285	40

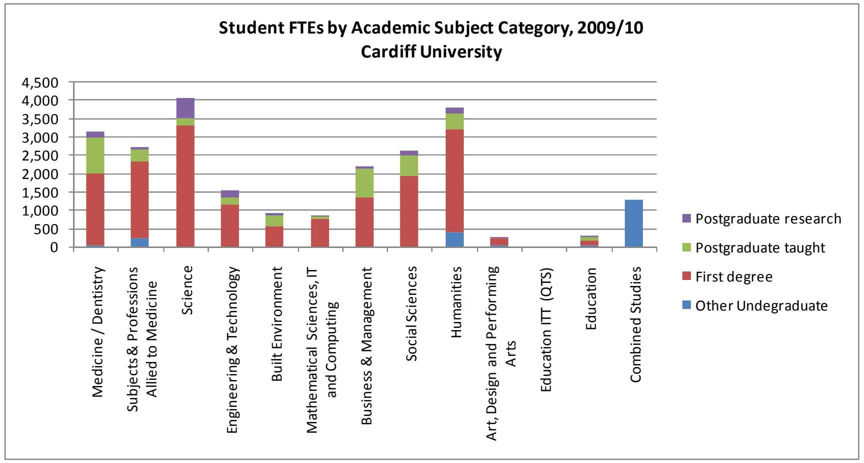
Annex F

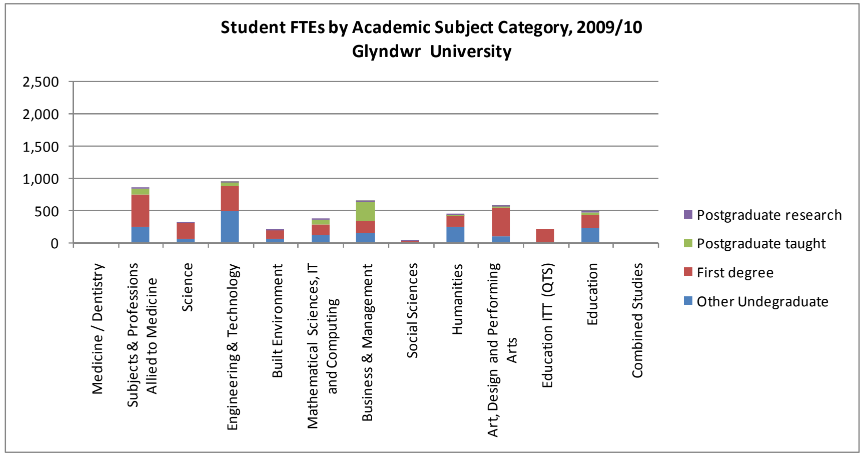

Student FTEs by Academic Subject Category, 2009/10
University of Glamorgan
4,500
4,000
3,500
3,000
2,500
2,000
1,500
1,000
500
0
Medicine / Dentistry
Subjects & Professions Allied to Medicine
Science
Engineering & Technology
Built Environment
Mathematical Sciences, IT and Computing
Business & Management
Social Sciences
Humanities
Art, Design and Performing Arts
Education ITT (QTS)
Education
Combined Studies
Postgraduate research
Postgraduate taught
First degree
Other Undegraduate


Student FTEs by Academic Subject Category, 2009/10
Bangor University
4,500
4,000
3,500
3,000
2,500
2,000
1,500
1,000
500
0
Medicine / Dentistry
Subjects & Professions Allied to Medicine
Science
Engineering & Technology
Built Environment
Mathematical Sciences, IT and Computing
Business & Management
Social Sciences
Humanities
Art, Design and Performing Arts
Education ITT (QTS)
Education
Combined Studies
Postgraduate research
Postgraduate taught
First degree
Other Undegraduate

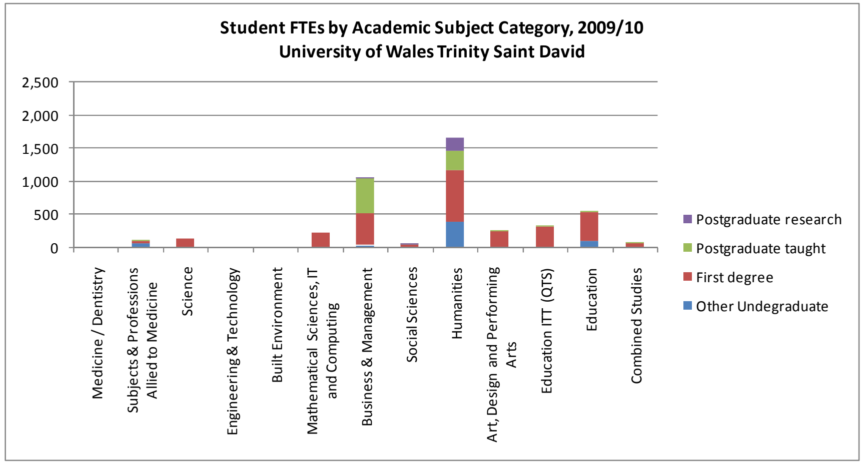

Student FTEs by Academic Subject Category, 2009/10
Aberystwyth University
2,500
2,000
1,500
1,000
500
0
Medicine / Dentistry
Subjects & Professions Allied to Medicine
Science
Engineering & Technology
Built Environment
Mathematical Sciences, IT and Computing
Business & Management
Social Sciences
Humanities
Art, Design and Performing Arts
Education ITT (QTS)
Education
Combined Studies
Postgraduate research
Postgraduate taught
First degree
Other Undegraduate


Student FTEs by Academic Subject Category, 2009/10
Swansea Metropolitan University
2,500
2,000
1,500
1,000
500
0
Medicine / Dentistry
Subjects & Professions Allied to Medicine
Science
Engineering & Technology
Built Environment
Mathematical Sciences, IT and Computing
Business & Management
Social Sciences
Humanities
Art, Design and Performing Arts
Education ITT (QTS)
Education
Combined Studies
Postgraduate research
Postgraduate taught
First degree
Other Undegraduate

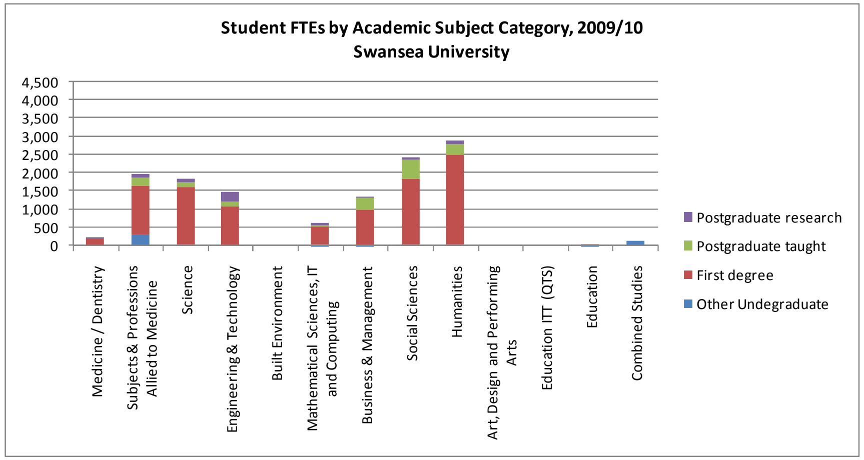

Student FTEs by Academic Subject Category, 2009/10
Cardiff University
4,500
4,000
3,500
3,000
2,500
2,000
1,500
1,000
500
0
Medicine / Dentistry
Subjects & Professions Allied to Medicine
Science
Engineering & Technology
Built Environment
Mathematical Sciences, IT and Computing
Business & Management
Social Sciences
Humanities
Art, Design and Performing Arts
Education ITT (QTS)
Education
Combined Studies
Postgraduate research
Postgraduate taught
First degree
Other Undegraduate


Student FTEs by Academic Subject Category, 2009/10
Glyndwr University
2,500
2,000
1,500
1,000
500
0
Medicine / Dentistry
Subjects & Professions Allied to Medicine
Science
Engineering & Technology
Built Environment
Mathematical Sciences, IT and Computing
Business & Management
Social Sciences
Humanities
Art, Design and Performing Arts
Education ITT (QTS)
Education
Combined Studies
Postgraduate research
Postgraduate taught
First degree
Other Undegraduate

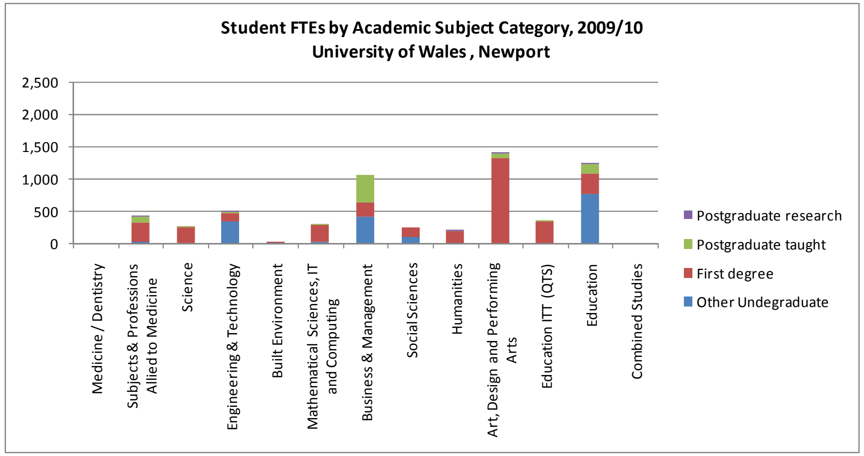
Annex F



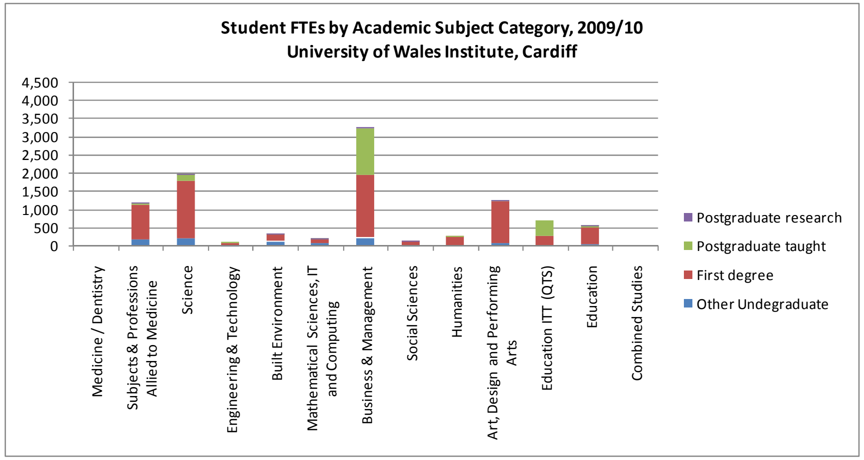
Student FTEs by Academic Subject Category, 2009/10
University of Wales Trinity Saint David
2,500
2,000
1,500
1,000
500
0
Medicine / Dentistry
Subjects & Professions Allied to Medicine
Science
Engineering & Technology
Built Environment
Mathematical Sciences, IT and Computing
Business & Management
Social Sciences
Humanities
Art, Design and Performing Arts
Education ITT (QTS)
Education
Combined Studies
Postgraduate research
Postgraduate taught
First degree
Other Undegraduate



Student FTEs by Academic Subject Category, 2009/10
Swansea University
4,500
4,000
3,500
3,000
2,500
2,000
1,500
1,000
500
0
Medicine / Dentistry
Subjects & Professions Allied to Medicine
Science
Engineering & Technology
Built Environment
Mathematical Sciences, IT and Computing
Business & Management
Social Sciences
Humanities
Art, Design and Performing Arts
Education ITT (QTS)
Education
Combined Studies
Postgraduate research
Postgraduate taught
First degree
Other Undegraduate



Student FTEs by Academic Subject Category, 2009/10
University of Wales , Newport
2,500
2,000
1,500
1,000
500
0
Medicine / Dentistry
Subjects & Professions Allied to Medicine
Science
Engineering & Technology
Built Environment
Mathematical Sciences, IT and Computing
Business & Management
Social Sciences
Humanities
Art, Design and Performing Arts
Education ITT (QTS)
Education
Combined Studies
Postgraduate research
Postgraduate taught
First degree
Other Undegraduate



Student FTEs by Academic Subject Category, 2009/10
University of Wales Institute, Cardiff
4,500
4,000
3,500
3,000
2,500
2,000
1,500
1,000
500
0
Medicine / Dentistry
Subjects & Professions Allied to Medicine
Science
Engineering & Technology
Built Environment
Mathematical Sciences, IT and Computing
Business & Management
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