

Institutional diversity in UK Higher Education

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Introduction and summary

1. There is a widespread perception that while institutional diversity is one of the main features of a healthy higher education system, there is some evidence of declining institutional diversity, particularly as smaller, specialised, usually single campus, institutions are absorbed into larger, comprehensive, multi-campus institutions. The purpose of the study has therefore been to identify, and if possible measure, the present extent and nature of institutional diversity, taking a number of measures of diversity, and to assess the extent to which this has changed.

2. The analysis in this report considers changes over broadly a 16 year period beginning in 1994-95, the first year in which data were collected by the Higher Education Statistics Agency (HESA)¹. However, it needs to be recognised that there are discontinuities in the data over this 16 year timeframe, and therefore the analysis in this paper selects appropriate and available years. Indeed some data, such as that those derived from Performance Indicators, did not appear until 1999.

3. It should also be noted that this report is specifically about the Higher Education sector as defined in the period under review – i.e. those institutions which provided data to the Higher Education Statistics Agency, principally because they were required to do so by their funding body. The definition of the Higher Education sector may change significantly in the light of proposed changes to funding regimes currently being considered by the UK Government and devolved administrations.

4. Over the historic period under review, there has been a modest reduction in the total number of higher education institutions (HEIs) in the UK – from 183 to 165. That apparent 10% reduction conceals the fact that several new institutions entered the HE sector, mostly from the further education sector, but so too did some private HE providers.

5. 40 institutional mergers have taken place in the UK higher education sector within the last sixteen years, mostly involving the “takeover” of a small specialist institution by a larger institution. This fact in itself would seem to imply that there has been a reduction in specialist provision within the HE sector: however, the admission of new institutions within the publicly-funded HE sector has had a partial balancing effect since many of these have been specialist. It is also, of course, the case that merged institutions may retain the same curriculum profile and accessibility as the two unmerged institutions.

¹ Previously, data had been collected by several different organisations depending on the nature of the higher education institution and its country of location.

6. An analysis of the characteristics of UK higher education institutions suggests that there is now less opportunity for potential students to enter specialist institutions than 16 years ago. While there has been a net decrease of three general institutions across the UK as a whole over the last sixteen years, the net decrease among specialist institutions has been 14 – despite the significant number of new specialist institutions entering the HE sector.

7. However, it does not follow from this that the overall diversity of provision has declined, since the opportunities previously provided by specialist institutions may have been carried over into the smaller number of institutions now operating.

8. A more detailed analysis, having regard to region of location, subject provision, student population characteristics, and other factors has therefore been carried out. This shows that

- There are significant differences in the changes observed across the countries and regions of the UK: London, the South-East, Wales and Scotland have seen significant reductions in the number of HE institutions, through mergers, while some other regions (the North-east and East Midlands, for example), have seen little or no change.
- There have clearly been major changes in the balance of subject provision of undergraduate courses, notably a decline in Science and Technology subjects, alongside a significant increase in Creative and Performing Arts, Media Studies and Politics. However, in general, the major changes in subject provision by HE institutions have matched the changes in demand as evidenced by applicant choices - although Mathematics is a notable exception to this, having seen an increase in demand and a reduction in supply.
- As regards both mode and level of study, there has been a convergent trend, i.e. there are fewer institutions which specialise exclusively or largely in full-time, part-time, postgraduate or undergraduate study: in particular, it is notable that only one institution now has no postgraduate students, compared with five in 1994-95.
- Over the last twelve years, many more institutions have enrolled significant numbers of students from outside the UK. It is now the norm for institutions to enroll more than 15% of their students from countries other than the UK.
- A diminishing number of institutions require the highest level of entry qualifications.
- A significant majority now recruiting over 90% of their entrants from the state sector.

9. In all of these respects, it can be argued that the Higher Education sector is less diverse than it was ten years or fifteen years ago. but the changes are marginal – there are still a large number of institutions that have differing

characteristics and do different things. Moreover, to the extent that there has been convergence, to a large extent the changes that have been observed represent a response by institutions to the demands and constraints of the external environment, most particularly changes in student demands and needs.

10. And as far as the balance between teaching and research is concerned, perhaps surprisingly in view of the apparent national policy towards greater concentration, this investigation has concluded that there has not really been much divergence of mission over time; although there has been a marginal increase in diversity amongst the most highly research active institutions, as research concentration has been promoted.

11. For the future, the pressures on HE institutions arising from the Government's introduction of a new funding regime for HE institutions in England create the most significant change to the HE landscape for at least twenty years. The comparatively minor changes in the diversity of the sector over the last fifteen years may well be over-shadowed by major changes, as growing market pressures come to bear on institutions – not only in England but also in Scotland, Wales and Northern Ireland. (At the time of writing, pressures towards institutional mergers in Wales are considerable, and the setting of fee levels at Scotland's universities (for UK students domiciled outwith Scotland) is an issue of considerable interest and controversy: it also potentially creates a new kind of diversity between institutions in Scotland.

Overview

Institutions

Number of institutions

12. In order to set this study into context, it begins by looking at the number of Higher Education Institutions (HEIs) and the changes which have taken place over the last sixteen years.

13. In 1994-95 there were 183 HEIs². In 2009-10 there were 165. This apparent loss of 18 institutions is however misleading, because over the period several institutions merged, and some were "admitted" to the sector, having previously been funded as Further Education Colleges (FECs), or entered the sector as private providers or de-merged, at least for funding and data analysis purposes, from other HE institutions.

14. Some of the issues concerning general and specialist institutions are considered below, but first the changes which have occurred in the overall numbers of institutions are examined.

² Excluding the University of Wales Registry which received public funding but had virtually no student provision.

15. It should be noted here that, within the period considered, no institution has disappeared from the overall count except through merger; and no new institution has appeared except through transfer or de-merger of activity, although in a few instances new institutions were nurtured – largely from the FE sector - towards the point at which they might join the HE sector.

Mergers

16. Annex A reports the mergers which have taken place within the HE sector since 1994-95. In total 40 are identified, although some are multiple, and so the count is not simple.

17. It will be seen from Annex A, in the large majority of instances, these mergers involved a specialist institution being “taken over” by a larger, more general institution – the combined institution retaining the name of the larger merger partner. In some instances these mergers are known to have arisen from financial weakness on the part of the smaller partner, but this was by no means always the case: mergers have taken place also because of a general policy decision (for example in relation to medical education in London in the 1990s) or because of a desire for rationalisation, for example in both Scotland and Wales.

New institutions in the sector

18. Alongside the disappearance of some institutions through mergers, new institutions have entered the sector, and these are shown in Annex B.

19. It will be seen that 18 institutions are identified here, and also that most of them are in fact specialist institutions, many specialising in the creative and performing arts³.

20. Of course, it should not be imagined that these institutions suddenly appeared and so increased the diversity of provision in the sector: all had previous existences either within the FE sector, or in the private sector or as part of a larger publicly funded institution.

21. It should also be recognised that, in parallel with the developments considered, there were several instances of further education institutions being partly or completely absorbed into large universities; and indeed those universities continue to support FE students.

22. So while 40 institutional mergers have taken place within the last 16 years mostly involving the takeover of a small specialist institution by a larger one, over the same period 18 institutions, most of which were identifiably specialist in nature, joined the sector.

³ It should also be mentioned that there are some providers of higher education which are not independent entities but which involve collaboration between existing providers, e.g. the Peninsular college of Medicine and Dentistry, and the Brighton and Sussex Medical School.

Institutions by country-region of the UK

23. This section of the report considers the distribution of institutions by country of the UK and region of England over time, looking at the number of institutions in 1994-95, and in the most recent year available (2009-10), together with one intermediate year, 2001-02: this year has been chosen because the Universities UK Patterns report for that year⁴ concentrated on regional issues, and contains much relevant material about that year.⁵

24. Table 1 below shows the number of HE institutions in each UK country and region of England in the relevant years.

Table 1: Numbers of HE institutions by region, 1994-95, 2001-02 and 2009-10

	1994-95	2001-02	2009-10
North East	5	5	5
North West	16	15	14
Yorkshire and The Humber	12	11	11
East Midlands	10	9	9
West Midlands	12	11	12
East of England	9	10	10
London	45	40	40
South East	22	17	17
South West	11	13	12
England sub-total	142	131	130
Wales	15	13	11
Scotland	23	20	19
Northern Ireland	2	4	4
UK-wide	1	1	1
Total	183	169	165

Source: HESA publications

25. The net reduction in the overall number of HE institutions was particularly noticeable in the late 1990s, and that it was by no means uniform across the countries and regions of the UK.

26. In more detail:

- The **North-East** region has seen no change at all in its institutions which consist of five universities.
- The **North-West** has seen a modest reduction overall, but this conceals a complex picture: over the period, two small specialist institutions (one

⁴ "Patterns of Higher education Institutions in the UK", report prepared by Professor Brian Ramsden for Universities UK. <http://www.universitiesuk.ac.uk/Publications/Documents-Patterns4.pdf>

⁵ It should be noted that the attribution to regions in the following paragraphs is crude, being based on institutional headquarters. Some institutions teach across regional boundaries, having multiple campuses. For example, the Conservatoire for Dance and Drama teaches in London, Leeds and Bristol. I have not thought it necessary for the purposes of this report to disaggregate all institutional campus arrangements.

concerned with teacher education and the other with technology) were subsumed within larger institutions, while two substantial pre-1992 universities merged. Two new institutions entered the sector: both are involved with performing or creative arts.

- **Yorkshire and the Humber** lost two colleges through mergers, one being a specialist arts and education college, and the other a general college. It gained one college of the performing arts.
- Provision within the **East Midlands** has been broadly stable in institutional terms with the exception of one merger of a college of art with its neighbouring university. However, it is relevant to note that some of the universities have seen major changes, including the transfer of students from former FE colleges.
- In the **West Midlands** also there has been a comparatively stable situation in terms of providing institutions: one specialist college of education merged with its local university, and a new entrant to the sector was a former FE college.
- The **East** region shows a net increase in the number of institutions: while it has lost one specialist education college, it has gained one general college (through de-merger) and also one specialist art college from the FE sector.
- **London** appears to show major change, having “lost” five of its 45 institutions over the period under review. However, much of this arose from a conscious policy decision to rationalise the provision of medical education in London, through the incorporation of smaller specialist institutions into larger ones. London has also seen one major institutional merger involving London Guildhall University and the University of North London becoming London Metropolitan University. Additionally some institutions have joined the sector from the FE sector, or by de-merger or transfer from the private sector.
- The **South-East** region also shows a net reduction in the number of institutions, arising chiefly because of the integration of some smaller specialist institutions into universities. The University for the Creative Arts was created by merger of smaller colleges of creative arts; and the University of Buckingham joined the list of HESA institutions, while remaining in the private sector.
- In contrast, the **South-West** region shows an increase overall of one institution over the timescale under consideration. While the larger institutions are unchanged, one specialist art college merged into a larger institution and two colleges joined the sector, one being previously a private agricultural college, and the other previously an FE college of the arts.
- **Wales** has seen a reduction in the number of institutions from 15 to 11, entirely because of the amalgamation of small specialist institutions into larger general institutions. The four merged institutions were colleges of agriculture, education, medicine and performing arts. No new institutions have joined the sector in the region.

- **Scotland** also has seen a net reduction of four institutions. Five specialist colleges – three colleges of education, one college of art, and a college of textiles - merged with larger universities, while there was one new entrant (the UHI Millennium Institute, now re-designated as the University of the Highlands and Islands) transferring provision from the FE sector.
- **Northern Ireland** appears to show a doubling of higher education institutions, but this involves only a technical de-merger of two education colleges from the university sector.

27. In this respect – the change in institutional provision over the last 16 years – there are marked differences between the countries and regions of the UK.

General versus specialist institutions.

28. Previous paragraphs, have referred to “specialist” and “general” institutions. When considering the distinction between two, it is undesirable to consider the concept of a monotechnic too literally. Most institutions, even if they declare themselves to be specialist providers, offer courses across a range of subject disciplines – there are at present only twelve which teach in only one of the nineteen formally recognised subject areas. The definition of a specialist institution is necessarily subjective. For the purposes of this report an institution is considered to be “specialist” if the whole of its teaching falls within five or fewer subject areas.⁶

29. Table 2 below shows the number of specialist and general HE institutions in the UK in 1994-95 and in 2009-10.

Table 2: Numbers of general and specialist institutions, and student numbers, 1994-95 and 2009-10

		Number of institutions	Total Student population	Average student population per institution
1994-95	General institutions	134	1,515,697	11,311
	Specialist institutions	48	51,616	1,075
	Total	183	1,567,313	8,565
2009-10	General institutions	131	2,437,670	18,608
	Specialist institutions	34	55,730	1,639
	Total	165	2,493,400	15,112

Source : HESA publications

⁶ In order to eliminate data deficiencies, institutions appearing to teach fewer than ten students in any subject area have been excluded.

30. While there has been a net decrease of three general institutions across the UK as a whole over the last sixteen years, the net decrease among specialist institutions has been 14 – despite the significant number of new specialist institutions entering the HE sector.

31. While there is now less opportunity for potential students to enter specialist institutions than was the case sixteen years ago – and as has been seen, there are marked differences in the changes that have taken place between regions and countries of the UK – this does not necessarily mean that overall curriculum opportunities have been reduced. When mergers have taken place it is quite possible that the curriculum offering of the junior partner will be carried over into the merged institution. Moreover, as was seen in Table 2 despite the reduction in the number of specialist institutions, there are actually more students studying at such institutions than previously.

Diversity of subject provision – supply and demand

32. There are two ways of considering the diversity of subject provision – based on supply by institutions and demand from students. However, the two should be related.

Supply – the number of institutions teaching major subjects

33. Analysis of subject provision over time is complicated by the significant changes which have occurred both in subject definitions and in student populations. For technical reasons, the following analysis compares the figures for 1996-97 with those for the latest year, 2009-10. Over that period the student population has been redefined in such a way that postgraduate numbers have declined because of the exclusion of writing-up students; and the subject definitions used by HESA and UCAS have also changed in some respects. Also there has been a movement in the attribution of students between the Combined subject area to more specific subjects.

34. **Annex C** shows changes in the numbers of institutions teaching most major subjects over the last 14 years. (For reasons explained in the previous paragraph, this analysis cannot be comprehensive – for example the subject History and its components cannot be tracked across this timescale.)

35. However, some major changes over time can be identified:

- All subjects in the **Physical sciences** show a marked reduction in the number of institutional providers, with the exception of Astronomy, the providers of which have more than doubled from a small base. Chemistry is now taught in 66 institutions compared with 93 fourteen years ago (a reduction of 20%). The reduction in institutions teaching physics has been even greater, from 69 to 47, a reduction of 32%.

- Most subjects in the areas of **Engineering and Technology** similarly show a marked decrease in the number of providers. Minerals technology is taught now in only three institutions compared with eight in 1996-97. Production engineering, Metallurgy, Ceramics, Polymers & textiles and Maritime technology also show marked reductions in the numbers of institutions making provision.
- **Botany** is now taught in only 11 institutions compared with 22 in 1996-97
- Conversely, the areas of **Creative and performing arts** show a marked increase in the number of teaching institutions
- This is true also of **English studies**
- There has been a significant increase in the number of institutions teaching **Architecture**.
- Media studies, Publishing and Journalism also show large increases, as does Cinematics and photography.
- There has been modest decline in the number of institutions teaching **Mathematics**.
- **Politics** shows a marked increase, while **Sociology** shows an increase although only a modest one.

36. In summary, there have clearly been major changes in the balance of subject provision of undergraduate courses, notably the decline in Science and Technology subjects, alongside a significant increase in Creative and Performing Arts, Media Studies and Politics.

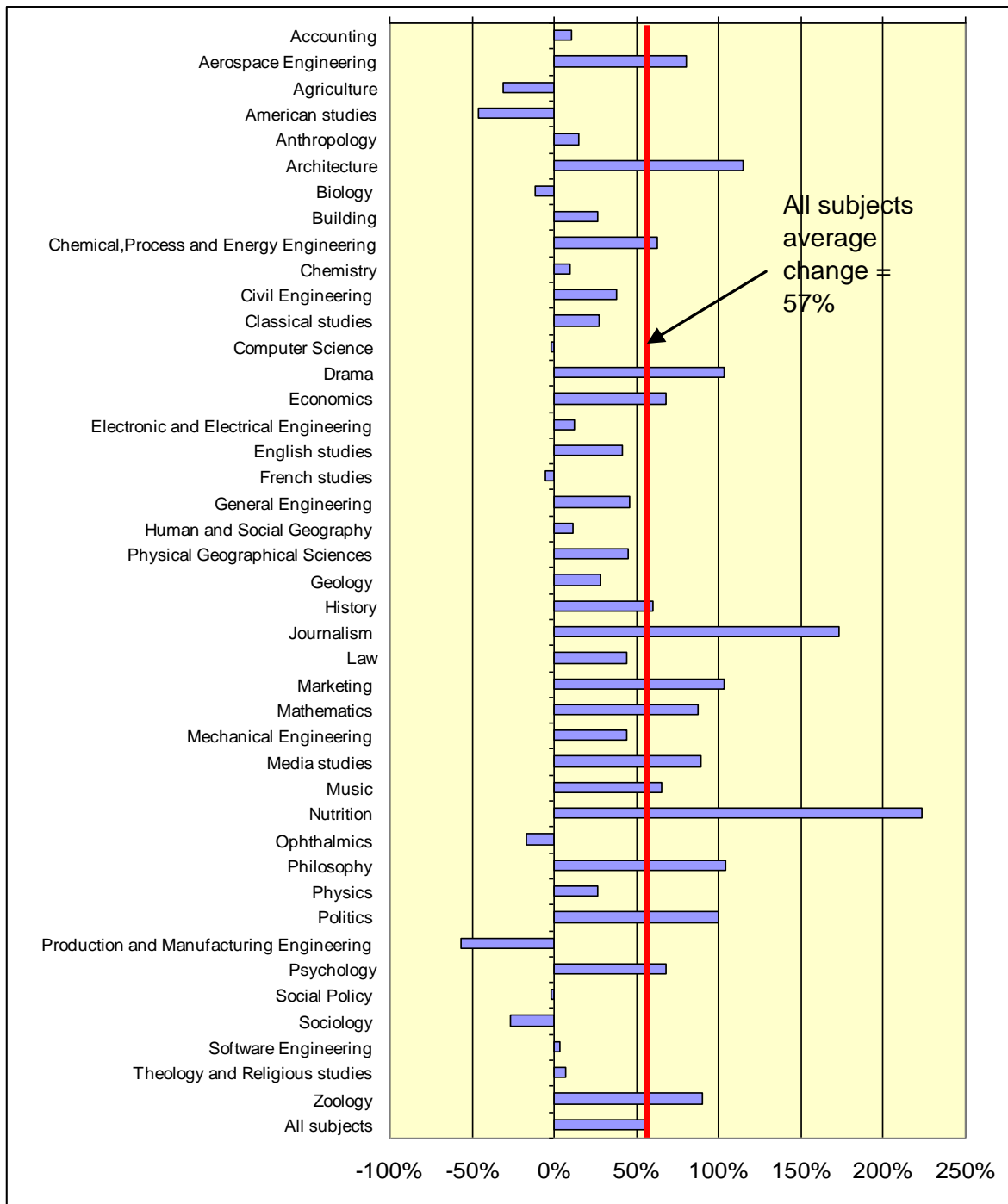
Demand – undergraduate application data

37. It is reasonable to consider whether these changes in supply are merely reflecting changes in demand from potential students. One way of considering this question is to look at the application figures through UCAS as a reflection of changes in demand from applicants. It must be recognised that this is an instrument of limited scope, given the changes in the institutional and subject constituency of UCAS over time.

38. However, subject to this caveat, Figure 1 shows the percentage change in applications for individual subjects at full-time undergraduate level which can reasonably be compared in 1996 and 2010.⁷

⁷ Art and Design and Nursing are excluded since they did not feature in the UCAS constituency in 1996. The chart is limited to subjects within which there were more than 500 applications in either year.

Figure 1: Percentage change in undergraduate applications for courses by individual subject, 1996 and 2010



Source UCAS statistics at www.ucas.com

39. If Figure 1 which is a chart of “demand” - is compared with the information in the previous paragraphs showing “supply”, even allowing for the limitations of the data, some interesting comparisons can be observed.

- **Media Studies** and **Journalism** feature strongly in both demand figures and in the supply.
- The same is true of subjects in the **Creative and performing arts**, and also in Architecture
- There are generally reductions in both supply and demand among disciplines in **Engineering and technology** (although Chemical engineering and Aeronautical engineering are exceptions), and also in **Physics** and **Chemistry**.
- However, there has been an above average increase in the number of applications to **Mathematics** courses, over a period in which the number of institutions teaching Mathematics has decreased sharply.

40. So while there have clearly been major changes in the balance of subject provision of undergraduate courses, notably the decline in science and technology subjects, alongside a significant increase in creative and performing arts, media studies and politics, in general, though with some notable exceptions, the major changes have matched changes in demand as evidenced by applicant choices.

Students

Qualifications of undergraduate applicants

41. The qualifications of applicants to HE institutions, are of especial interest in view of the Government's intention to release unlimited numbers of places for students with UCAS tariff scores of AAB or better. (This equates to 340 UCAS tariff points.)

42. In 2004-05 50 institutions (33%) admitted first year first degree students with an average points score of 340 (equivalent to AAB at GCE A-level), while 89 (59%) had an average points score of less than 300 (equivalent to BBB). In 2009, only 44 institutions (30%) exceeded an average of 340 points, while 88 (again 59%) had an average of less than 300. The figures suggest that there is a diminishing number of institutions which require the highest qualification levels, and that there is some convergence in relation to entry qualifications to full-time undergraduate courses.

Changes in the student population

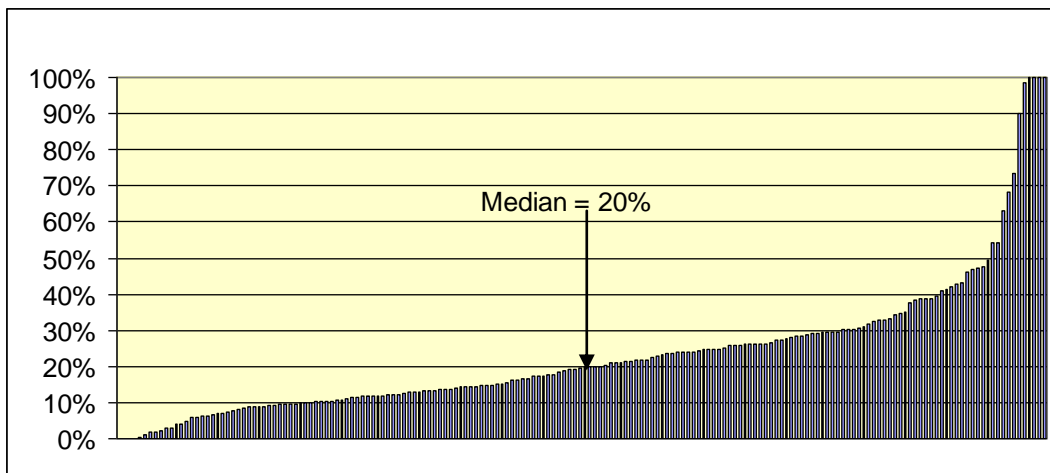
43. The following paragraphs consider changes in balance of the student population by mode and level of study, by age, gender and ethnicity; performance indicators that report on institutional access to higher education are also considered.

Level of study

44. Concerning the balance between undergraduate and postgraduate study, in 1995-96, there were five institutions which made no postgraduate provision, and four which were exclusively postgraduate institutions. By 2009-10, only one HE institution had no postgraduate offering, and six were exclusively postgraduate. Of these six, one had de-merged, while one had abandoned its undergraduate courses.

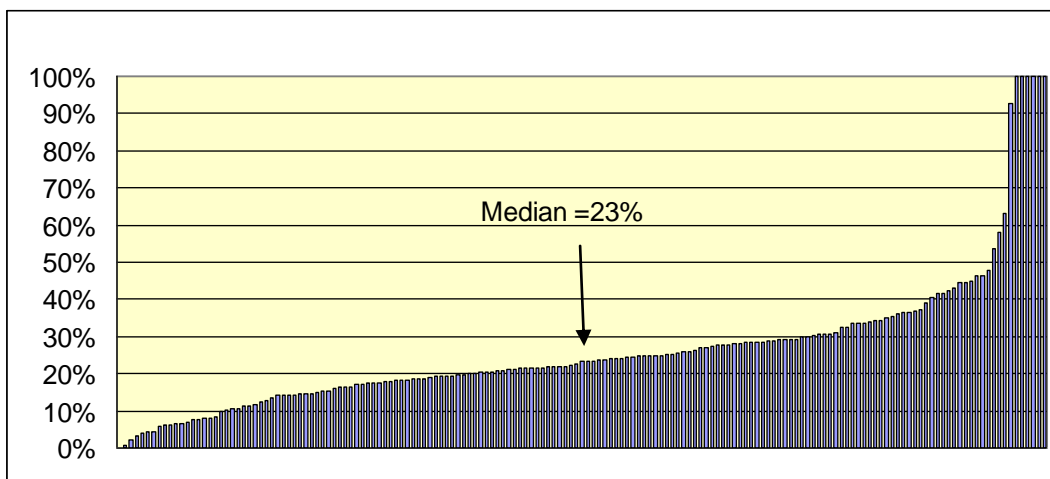
45. Figures 2 and 3 map the changes over time.

Figure 2: Institutions' percentage of postgraduate students 1995-96



Source: HESA students Reference volume

Figure 3: Institutions' percentage of postgraduate students 2009-10



Source: HESA students Reference volume

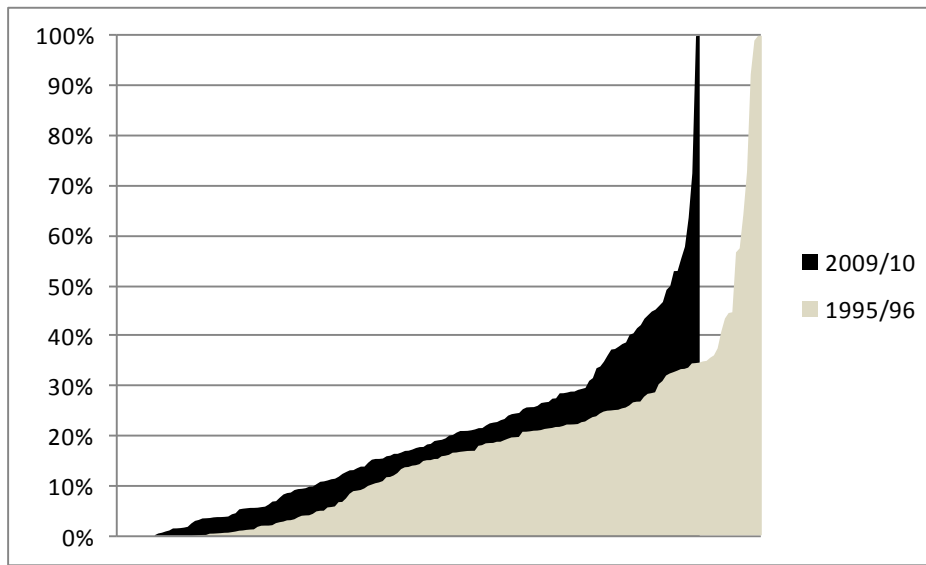
46. There is some evidence here of convergence, as a growing proportion of HE institutions offer postgraduate study, although there remain several solely postgraduate institutions.

Mode of study

47. Between 1995-96 and 2009-10, there was a significant shift nationally towards part-time study among undergraduates in the UK. Full-time undergraduates increased by 37%, while part-time undergraduates increased by 54%.

48. In this period, as Figure 4 shows, there was a significant increase in the proportion of part-time students across the whole spectrum of HE institutions,

Figure 4: Percentage part-time among undergraduate students by institution, 1995-96 and 2009-10



Balance between home and International students

49. Another differentiator among institutions is the balance between home, EU and other international students.

50. In 1996-97, 86% of full-time students (undergraduate and postgraduate) at UK HE institutions were domiciled in the UK: the average percentage of non-UK students in each institution was 14%, within which the average percentage of students from outside the EU was 7%.

51. In 2009-10, only 79% of full-time students were from the UK: on average, 21% of students were from outside the UK, of whom 14% (two thirds) were from outside the EU. This represents an increase of 50%, the whole of the increase being represented by students from outside the EU, whose numbers increased from 7% of the student population to 14%. The proportion of EU students remained constant at 7% (despite the enlargement of the EU in the intervening period).

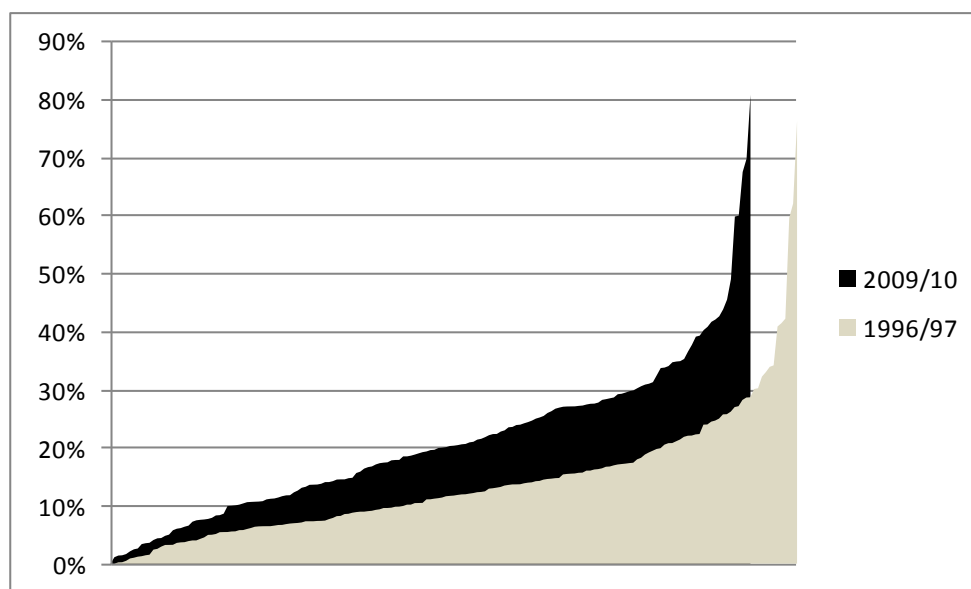
52. In terms of individual institutions, Table 3 below summarises the marked growth in institutions which make significant provision for non-UK students.

Table 3: Percentage penetration of non-UK and non-EU students, 1996-97 and 2009-10

		Non-UK	Non-EU
1996-97	Over 15%	61	18
	Over 30%	12	4
2009-10	Over 15%	102	70
	Over 30%	30	8

53. The distribution by institution is shown in Figure 5.

Figure 5: Percentage of institutions having more than 15% non-UK students, 1996-97 and 2009-10



Source: HESA Student reference volumes

54. It is clear that institutions with large numbers of non-UK students have ceased to be a minority, and that multi-domiciled enrolments have become the norm. Universities are less differentiated in this respect.

Widening participation

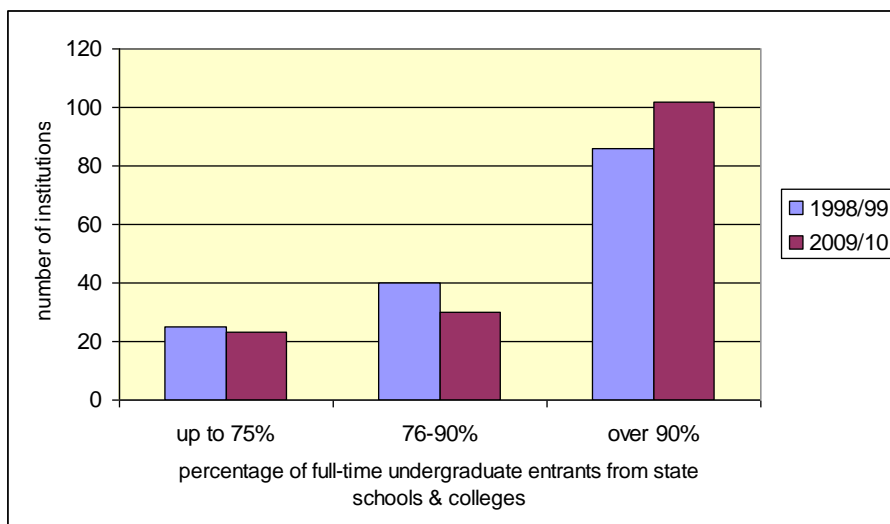
55. Since 1998-99, there have been published performance indicators for the higher education sector in the UK, under the auspices of the Performance Indicators Steering Group. Some of these indicators have been derived from data that sheds light on "widening participation".

56. Three measures have been used in the performance indicators: national definitions of social class, geographical estimates of participation, and analysis of entrants by previous school or college. In identifying changes in the

differentiation of the sector, the first two of these measures cannot be used robustly, since their definitions have changed markedly over the last ten years. (The social class indicator has changed with the introduction of NS-SEC⁸, while the geographical indicator, designed to reflect the social class of students' home neighbourhoods, has been changed significantly with the introduction of the "POLAR" system by the Higher Education Funding Council for England.⁹) While these changes may have improved the snapshot data which can be derived, they have generated significant turbulence in time series analysis, and should be discounted for the purpose of this report.

57. However, the third measure of widened participation is the percentage of full-time young undergraduates entering higher education from state schools and colleges, for which there is reasonable continuity. The change over time is summarised in the Figure 6.

Figure 6: Percentage entrants to full-time undergraduate courses from state schools and colleges, 1998-9 and 2009-10



Source: HESA Performance Indicators

58. The number of institutions admitting more than 90% of their intake from the state sector has grown markedly, implying some convergence in the social composition of institutions' student bodies.

Teaching and research activity

Balance between teaching and research

59. Perhaps the most simple, straightforward - and perhaps overly simplistic - differentiator in higher education institutions in the UK (and also in many other countries) is the balance between teaching and research activity.

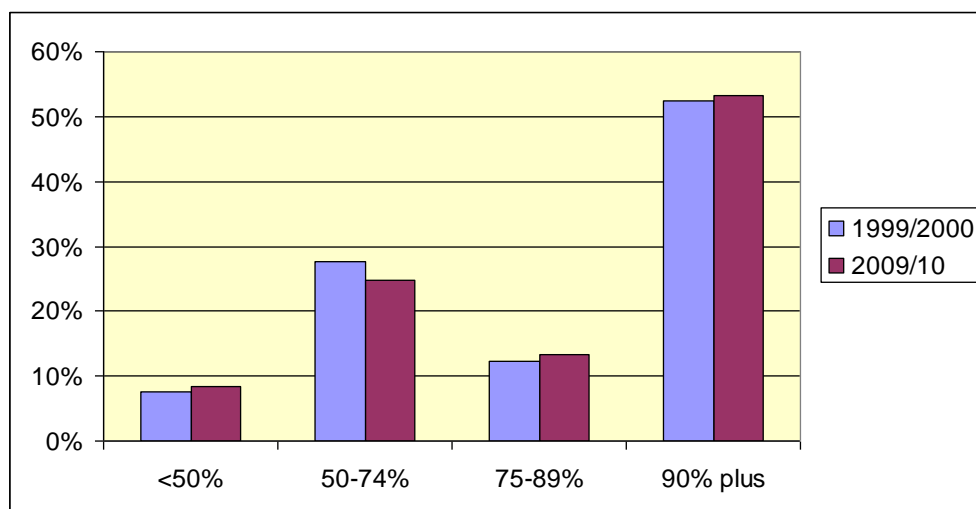
⁸ NS-SEC – see ONS website for details.

⁹ POLAR – see HEFCE website for details

60. While the two are obviously closely inter-related, the balance between them can be measured, at least in terms of input¹⁰, by considering the income received for teaching and research.

61. Approximately 69% of the (total teaching and research – T+R) income received by UK higher education institutions is specifically designated for teaching, and comes through a combination of funding council grants and tuition fees and support grants. This has been unchanging over the last ten years, although there has been a change in the balance among individual institutions,.

Figure 7: Teaching income as percentage of teaching and research income: institutional distribution, 1999-2000 and 2009-10



Source: HESA, HE Finance Plus

62. Figure 7 shows that the proportion of institutions receiving less than 50% of their T+R income from teaching activities has grown slightly to just over 8% of all HE institutions; while the number receiving between 50% and 74% has declined. The number of institutions in the higher percentage bands have both increased slightly.

63. These findings correlate well with the earlier conclusions about the changes in the number of specialist institutions within the sector, many of which have, or had, a research orientation: i.e. while some specialist institutions have been subsumed within other institutions, new ones have emerged, and the balance is not much changed.

64. From these data it is apparent that there has, over the last ten years, been no significant diminution of the concentration of research funding, and therefore the balance between teaching and research funding in institutions across the sector

¹⁰ While it is possible to measure the financial input, the measurement of the output from teaching resources is difficult, and the measurement of output of research resources is – arguably – impossible.

Research concentration

65. A further issue affecting institutional diversity is the concentration of funding for research, which has been a subject of policy determination in recent years (i.e. there has been a positive policy move towards greater research concentration)

66. As a result, the number of institutions receiving more than 3% of the total public funding for research¹¹ has reduced from 11 to 9. Across the whole time-frame, 4 (identical) institutions have received approximately a quarter of all public research income. So although there has been a policy priority to diversify the sector in terms of its research activity (i.e. to concentrate research activity), the data do not suggest that this has occurred.

67. The previous paragraph indicates that over recent years in some respects there may have been a modest decline in the diversity of institutions in relation to the teaching of students. However, there has not been a significant change in the balance of funding between teaching and research, although among institutions in receipt of research funding there has been a marginal increase in the concentration of funding. However, this is not sufficient to conclude that there has been significant increase in diversity.

Conclusions and a look at the future

68. it is clear from the analysis of this report that some of the concerns that have been expressed about the wholesale diminution of diversity in the sector are unfounded - despite a modest amount of convergence in some respects the sector remains highly diverse in many significant respects.

69. However, this report is published early in 2012, after the Government has proposed, through its White Paper, the most significant changes to impact on Higher Education institutions, their staff and their students for at least twenty years. What the impact of these changes will be on the diversity of institutions is impossible to say. It is, however, safe to think that commercial pressures will increase - and it is commercial pressures of this kind which have in the past led to the modest convergence of activity and mission described here, such as it is.

70. A converse influence however is the "opening-up" of the HE sector to new providers, both from the FE and the "for profit" sectors, which will themselves increase diversity and which may spur others to change.

¹¹ i.e. funding council R grant plus research grants and contracts from government funded research bodies

Appendix 1 - Mergers in the Higher education sector since 1994-95

Unless otherwise stated, the merged institutions assumed the name of the last named institution. Only publicly funded higher education institutions are included in this list: it does not include further education colleges that have merged with higher education institutions.

1994-1995

Institute of Psychiatry (transition)	and	King's College London
West London Institute of Higher Education	and	Brunel University
London Hospital Medical College	and	Queen Mary and Westfield College
St Bartholomew's Hospital Medical School	and	Queen Mary and Westfield College
The Welsh Agricultural College	and	University College of Wales,
Duncan of Jordanstone College of Art	and	University of Dundee

1995-1996

Salford College of Technology	and	University of Salford
Winchester School of Art	and	University of Southampton
Charlotte Mason	and	St Martin's College

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

1996-1997

Institute of Psychiatry	and	King's College London
Royal Postgraduate Medical School	and	Imperial College of Science, and Medicine
Charing Cross and Westminster Medical	and	Imperial College of Science, and Medicine
La Sainte Union College	and	University of Southampton
Coleg Normal	and	University College of North Wales, Bangor

1998-1999

Loughborough College of Art and Design	and	Loughborough University
United Medical and Dental School (UMDS)	and	King's College London
Royal Free Hospital School of Medicine	and	University College London
Westhill College	and	University of Birmingham
Moray House Institute of Education	and	University of Edinburgh
The Scottish College of Textiles	and	Heriot-Watt University

1999-2000

St Andrew's College of Education	and	University of Glasgow
2000-2001		
Westminster College Oxford	and	Oxford Brookes University
Wye College	and	Imperial College of Science, Technology and Medicine
North Riding College	and	University of Hull
College of Guidance Studies	and	Canterbury Christ Church University College
Bretton Hall	and	University of Leeds
Homerton College, Cambridge	and	University of Cambridge (partial merger)
2001-2002		
London Guildhall University	and	University of North London, forming London Metropolitan University
Northern College of Education	and	University of Aberdeen and the University of Dundee
2002-2003		
Northern School of Contemporary Dance	and	Conservatoire for Dance and (Transfer of higher education provision.)
2004-2005		
University of Manchester Institute of and Technology	and	Victoria University of Manchester, the University of Manchester
Kent Institute of Art and Design	and	Surrey Institute of Art and Design, forming the University College for the Creative Arts
The University of Wales College of Medicine	and	Cardiff University
2005-2006		
Wimbledon School of Art	and	University of the Arts London
Homerton College	and	Anglia Ruskin University
2006-07		
De Montfort University's Bedford campus	and	University of Bedfordshire (transfer of provision)
2007-08		
Cumbria Institute of the Arts	and	Carlisle campus and Penrith the University of Central with St Martin's College, forming University of Cumbria
Dartington College of Arts	and	University College Falmouth

The Royal College of Nursing transferred provision to The Open University
Royal Welsh College of Music and Drama and University of Glamorgan
Bell College and University of Paisley, forming the University of the West of Scotland.

Appendix 2 - New institutions counted within the higher education sector

Year	Institution	Reason
1995-96	Northern School of Contemporary Dance	Transfer from FE to HE
	Norwich School of Art and Design	Transfer from FE to HE
1997-98	Cumbria College of Art and Design	Transfer from FE to HE
1999-2000	Stranmillis University College	de-merger
	St. Mary's University College	de-merger
2000-2001	Institute of Cancer Research	de-merger
2001-02	Royal Agricultural College	Transfer from private sector
	UHI Millennium Institute	Transfer from FE to HE
	The Arts Institute at Bournemouth	Transfer from FE to HE
	Bell College	Transfer from FE to HE
	Conservatoire for Dance and Drama	Transfer from FE to HE
2002-03	Birmingham College of Food, Tourism and Creative Studies	Transfer from FE to HE
	Courtauld Institute of Art	de-merger
2004-05	University of Buckingham	Incorporated in HESA data for the first time
2005-06	Leeds College of Music	Transfer from FE to HE
2006-07	Guildhall School of Music and Drama	Transfer from FE to HE
	Liverpool Institute for Performing Arts	de-merger
2007-08	University Campus Suffolk	de-merger

Appendix 3 – Change over time in the number of institutions teaching individual subjects.

Subject, 1996-97	Number of institutions teaching, 1996-97	Subject, 2009-10	Number of institutions teaching, 2009-10	Increase-decrease %
(A1) PRE-CLINICAL MEDICINE	28	Pre-clinical medicine	30	7%
(A2) PRE-CLINICAL DENTISTRY	14	Pre-clinical dentistry	11	-21%
(A3) CLINICAL MEDICINE	33	Clinical medicine	42	27%
(A4) CLINICAL DENTISTRY	15	Clinical dentistry	19	27%
(B1) ANATOMY AND PHYSIOLOGY	40	Anatomy, physiology & pathology	72	80%
(B4) NUTRITION	18	Nutrition	43	139%
(B5) OPHTHALMICS	9	Ophthalmics	11	22%
(B6) AUDIOLOGY	10	Aural & oral sciences	25	150%
(B7) NURSING	87	Nursing	85	-2%
(B8) MEDICAL TECHNOLOGY	29	Medical technology	43	48%
(B9) OTHER MEDICAL SUBJECTS	100	Others in subjects allied to medicine	115	15%
(C1) BIOLOGY	96	Biology	97	1%
(C2) BOTANY	22	Botany	11	-50%
(C3) ZOOLOGY	32	Zoology	39	22%
(C4) GENETICS	26	Genetics	31	19%
(C5) MICROBIOLOGY	35	Microbiology	44	26%
(D2) AGRICULTURE	38	Agriculture	46	21%
(D3) FORESTRY	7	Forestry	11	57%

Subject, 1996-97	Number of institutions teaching, 1996-97	Subject, 2009-10	Number of institutions teaching, 2009-10	Increase-decrease %
(D4) FOOD SCIENCE	30	Food & beverage studies	34	13%
(D8) AGRICULTURAL SCIENCES	7	Agricultural sciences	2	-71%
(F1) CHEMISTRY	83	Chemistry	66	-20%
(F2) MATERIALS SCIENCE	10	Materials science	6	-40%
(F3) PHYSICS	69	Physics	47	-32%
(F5) ASTRONOMY	14	Astronomy	29	107%
(F6) GEOLOGY	47	Geology	40	-15%
(F8) GEOGRAPHY STUDIES AS A SCIENCE	61	Physical geographical sciences	71	16%
(G1) MATHEMATICS	94	Mathematics	87	-7%
(G4) STATISTICS	42	Statistics	39	-7%
(G5) COMPUTING SCIENCE	116	Computer science	122	5%
(H1) GENERAL ENGINEERING	73	General engineering	76	4%
(H2) CIVIL ENGINEERING	70	Civil engineering	69	-1%
(H3) MECHANICAL ENGINEERING	84	Mechanical engineering	82	-2%
(H4) AERONAUTICAL ENGINEERING	22	Aerospace engineering	33	50%
(H7) PRODUCTION ENGINEERING	65	Production & manufacturing engineering	51	-22%
(H8) CHEMICAL ENGINEERING	27	Chemical, process &	30	11%

Subject, 1996-97	Number of institutions teaching, 1996-97	Subject, 2009-10	Number of institutions teaching, 2009-10	Increase-decrease %
(H9) OTHER ENGINEERING	12	energy engineering Others in engineering	18	50%
(J1) MINERALS TECHNOLOGY	8	Minerals technology	3	-63%
(J2) METALLURGY	11	Metallurgy	8	-27%
(J3) CERAMICS AND GLASSES	7	Ceramics & glasses	4	-43%
(J4) POLYMERS AND TEXTILES	21	Polymers & textiles	11	-48%
(J6) MARITIME TECHNOLOGY	11	Maritime technology	5	-55%
(J8) BIOTECHNOLOGY	18	Biotechnology	22	22%
(K1) ARCHITECTURE	41	Architecture	67	63%
(K2) BUILDING	56	Building Planning (urban, rural	61	9%
(K4) TOWN AND COUNTRY PLANNING	43	& regional)	46	7%
(L1) ECONOMICS	85	Economics	83	-2%
(L3) SOCIOLOGY	99	Sociology	102	3%
(L4) SOCIAL POLICY AND ADMINISTRATION	62	Social policy	70	13%
(L5) SOCIAL WORK	109	Social work	107	-2%
(L6) ANTHROPOLOGY	31	Anthropology	24	-23%
(M1) POLITICS	80	Politics	95	19%
(M3) LAW	89	Law total	105	18%
(N1) BUSINESS AND MANAGEMENT STUDIES	122	Business studies	122	0%
(N3) FINANCIAL MANAGEMENT	52	Finance	95	83%
(N4) ACCOUNTANCY	74	Accounting	102	38%

Subject, 1996-97	Number of institutions teaching, 1996-97	Subject, 2009-10	Number of institutions teaching, 2009-10	Increase-decrease %
(N5) MARKETING AND MARKET RESEARCH	59	Marketing	100	69%
(P4) MEDIA STUDIES	37	Media studies	111	200%
(P5) PUBLISHING	5	Publishing	17	240%
(P6) JOURNALISM	16	Journalism	68	325%
(Q1) LINGUISTICS	40	Linguistics	51	28%
		Comparative literary		
(Q2) COMPARATIVE LITERATURE	32	studies	18	-44%
		English		
(Q3) ENGLISH	99	studies	120	21%
		Latin		
(Q6) LATIN LANGUAGE & LITERATURE	4	studies	6	50%
		Classical		
		Greek		
(Q7) ANCIENT GREEK LANGUAGE & LITERATURE	3	studies	4	33%
		Classical		
(Q8) CLASSICS	24	studies	26	8%
		French		
(R1) FRENCH LANGUAGE, LITERATURE & CULTURE	65	studies	71	9%
		German		
(R2) GERMAN LANGUAGE, LITERATURE & CULTURE	51	studies	48	-6%
		Italian		
(R3) ITALIAN LANGUAGE, LITERATURE & CULTURE	27	studies	28	4%
		Spanish		
(R4) SPANISH LANGUAGE, LITERATURE & CULTURE	39	studies	63	62%
		Portuguese		
(R5) PORTUGUESE LANGUAGE, LITERATURE & CULTURE	5	studies	14	180%
		Russian		
		& East		
		European		
(R8) RUSSIAN LANGUAGES, LITERATURE & CULTURE	21	studies	18	-14%

Subject, 1996-97	Number of institutions teaching, 1996-97	Subject, 2009-10	Number of institutions teaching, 2009-10	Increase-decrease %
(T3) CHINESE LANGUAGES, LITERATURE & CULTURE	10	Chinese studies	17	70%
(T4) JAPANESE LANGUAGES, LITERATURE & CULTURE	16	Japanese studies	16	0%
(T6) MODERN MIDDLE-EASTERN LANGUAGES, LITERATURE & CULTURE	14	Modern Middle Eastern studies	14	0%
(T7) AFRICAN LANGUAGES, LITERATURE & CULTURE	2	African studies	3	50%
(V6) ARCHAEOLOGY	31	Archaeology	35	13%
(V7) PHILOSOPHY	55	Philosophy	60	9%
(V8) THEOLOGY AND RELIGIOUS STUDIES	60	Theology & religious studies	54	-10%
(W1) FINE ART	70	Fine art	84	20%
(W2) DESIGN STUDIES	75	Design	94	25%
(W3) MUSIC	71	Music	96	35%
(W4) DRAMA	70	Drama	102	46%
(W5) CINEMATICS	37	Cinematics & photography	85	130%
(W6) CRAFTS	4	Crafts	17	325%