

November 2013

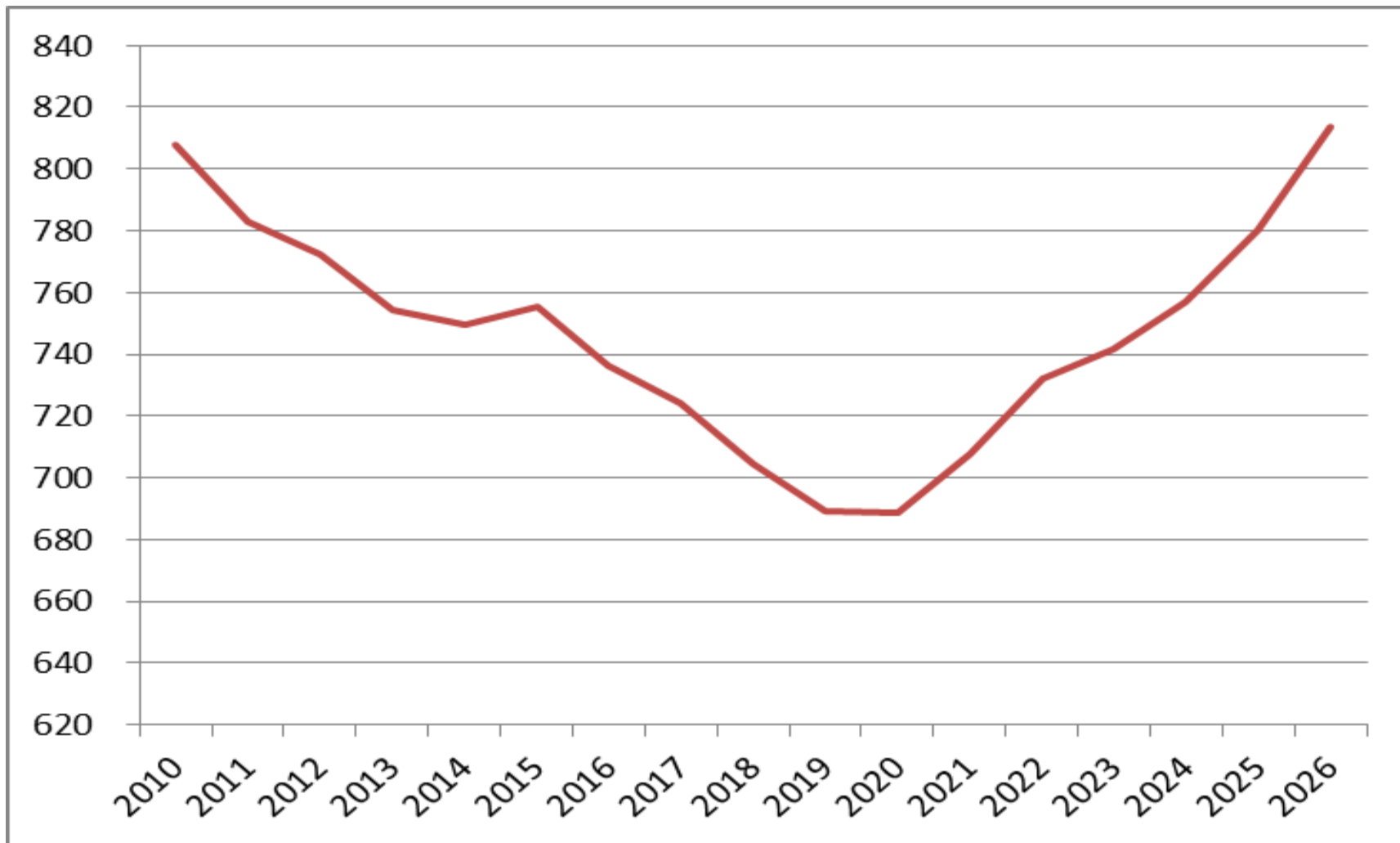
HE Challenges: ICE perspective

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ICE context

- 80,000 members worldwide
- 20,000 student members worldwide
- History of decline in student numbers in previous recessions followed by skills shortages in recovery.
- 2012-2013: 10224 ICE student members on courses at 'JBM accredited' universities.
- This represents 55.21% of all students on accredited courses.
- An additional 1064 student members in FE/non-accredited i.e. 9% of student membership

ONS 2010 projections: 18 year olds 000s



Applicants

JBM Accredited Courses	2012	2011	2010	2009
JBM Accredited Courses	8010	8,654	8,814	8,238
Change previous year	7.44%	1.81%	6.99%	n/a

Gender	2012	2011	2010	2009
Female	1,365	1,334	1,419	1,279
Male	6,645	7,320	7,395	6,959
Total	8,010	8,654	8,814	8,238
%age female	17.04	15	16.10	15.53

UCAS: QYPR* and domicile

QYPR	2009	%age	%age UK	2010	%age	%age UK	2011	%age	%age UK	2012	%age	%age UK
1	436	5	8	539	6	9	572	7	10	526	7	10
2	795	10	14	754	9	13	850	10	14	750	9	14
3	1,019	12	18	1,137	13	20	1,108	13	19	1,022	13	19
4	1,394	17	24	1,398	16	24	1,390	16	24	1,176	15	22
5	2,071	25	36	1,969	22	34	1,985	23	34	1,834	23	35
Non-UK**	2,523	31		2,948	33		2,697	31		2,593	32	
Un-known	n/a			69			52			109		
Total	8,238			8,814			8,654			8,010		

*Quintile Young Participation Rate

**c 75% from outside Europe

JBM output 2012

MEng	BEng (Hons) CEng +FL	MSc	IEng Degree		HNC	HND/ FD	NC	Total
			Hons	Ord				
1607	1619	2283	840	71	166	160	10	6756

JBM reported entry 2012

Yr 1	2012	2011	% Difference
MEng	1957	2134	-8.29
BEng	2079	2555	-18.63
IEng	640	1018	-37.13
Totals	4676	5707	-18.07
All Years			
Level4/5	832	725	14.76
MSc	3489	2748	26.97

JBM total numbers

All Years	Total	Overseas	% Overseas
MEng	8283	1192	14.39
BEng	6442	1597	24.79
IEng	2618	295	11.27
MSc	3489	1863	53.40
Totals	20832	4947	23.75
Level4/5	832	29	3.49

UCAS and arrivals

- 8010 UCAS applicants shake down into 4676+ arriving (supplemented by part time applicants and overseas students not necessarily applying through UCAS).
- Reasons cited for the decline in numbers by universities include:
 - a rush to apply before fees increased, estimated by Cambridge to have resulted in 6% recruitment above target for 2011 and 6% below for 2012.
 - the recession, particularly affecting part-time numbers on IEng degrees, with employers reducing training budgets.
 - recession in Ireland significantly affecting recruitment in Northern Ireland.
 - visa issues – numbers of overseas students are buoyant so far but a number of universities report students being turned down unexpectedly while others have only been granted visas when it has been too late to start.
 - AAB (Now ABB) and quotas having some effect. Some universities that could have recruited through clearing decided to reduce staff-student numbers for quality reasons.
 - there are fewer 18 year olds – no upturn in numbers until 2020.
 - apprentices entering at L3 probably comprise 8% of all entrants all levels

Apprenticeships

ICE/CIBSE L3 apprenticeship starts (2-3 yrs):

2010	2011	2012	2013
8	45	120	200

South Thames College
Leeds College of Building
City of Bristol College
Exeter College
Bridgend College
Llandrillo
Stephenson College

Liverpool Community College
Southampton City College
City College Norwich
Newcastle College
Solihull College
New College Nottingham
College of North West London

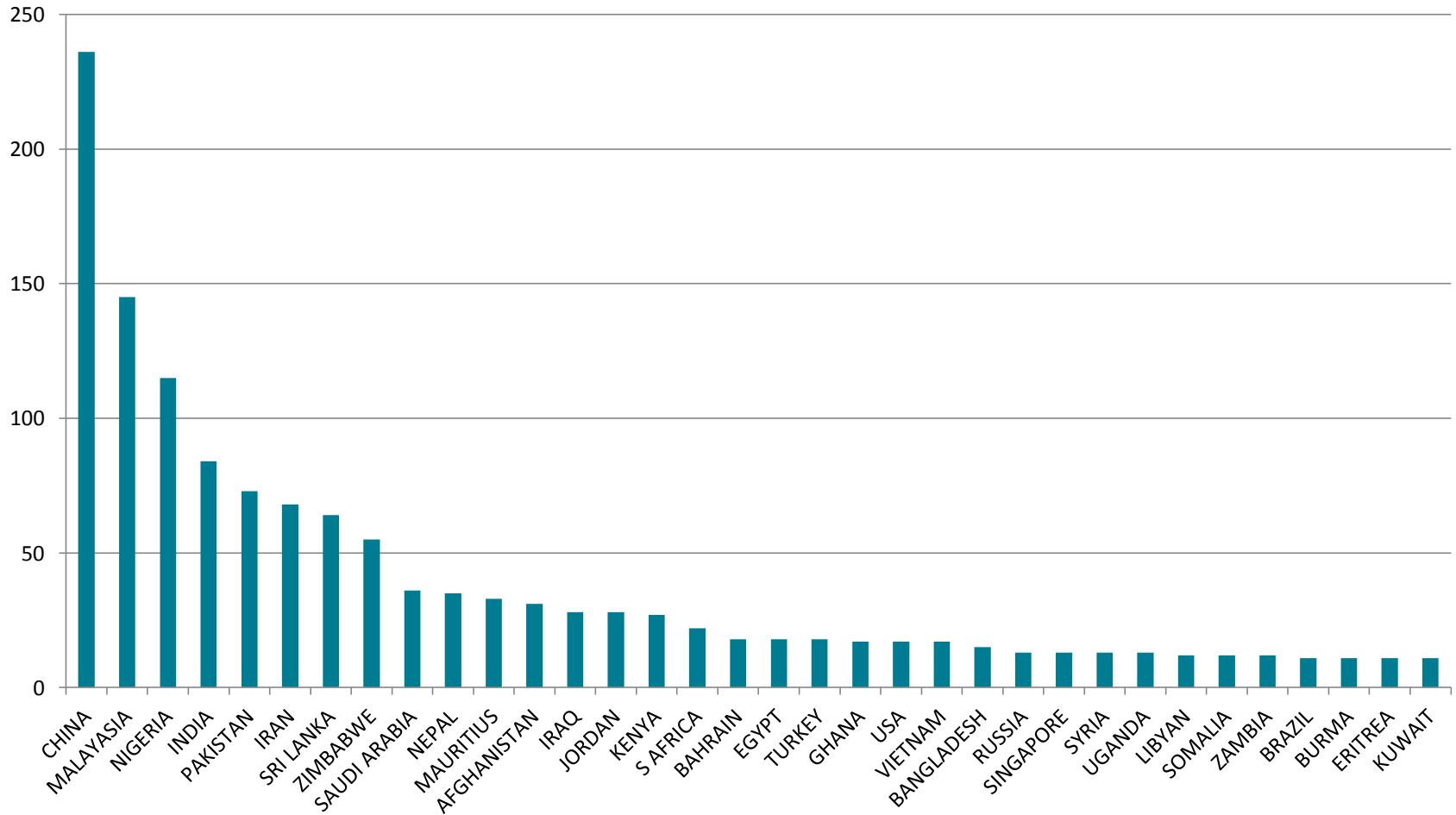
Higher apprenticeships L5

- Leeds College of Building
- Bradford College
- Leicester College
- Highbury College
- New College Nottingham
- No current Level 6 or 7

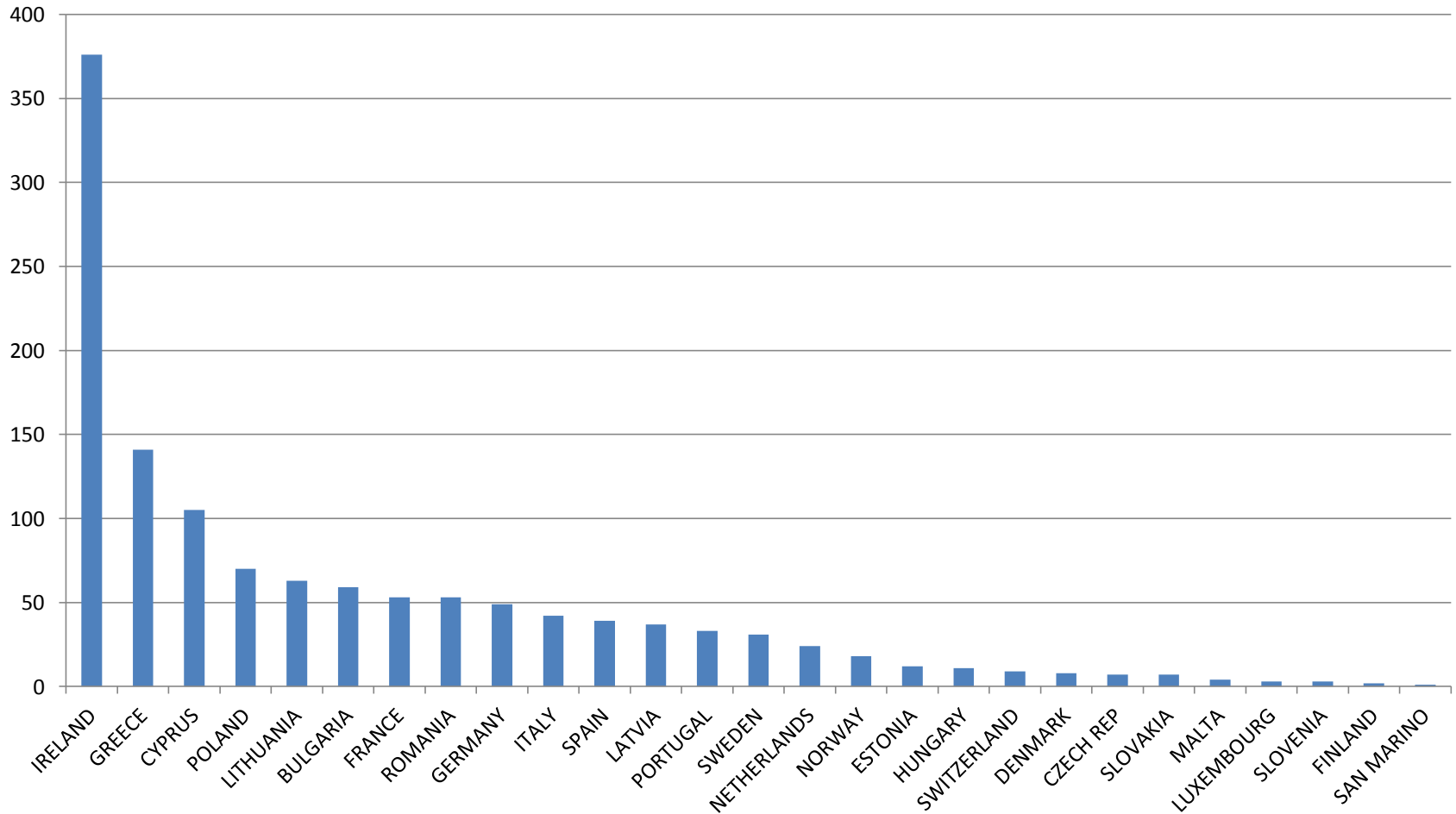
Summary

- Total numbers in universities are still relatively healthy and cohorts graduating seem likely to be relatively stable in the short term even allowing for attrition.
- There has been an overall increase in the numbers studying at Levels 4 and 5 on Foundation Degree provision particularly, but individual institutions report decline in PT numbers.
- Numbers on MSc programmes have increased – this is partly explained by a rise in numbers of overseas students.
- Universities remain vulnerable to the vagaries of student visa controls. MSc provision is especially vulnerable. Some universities are heavily reliant on students from particular countries such as India and China to maintain specialist course provision.

ICE student members (overseas studying at UK JBM institutions)



ICE student members (EU et al. studying at UK JBM universities)



Thank you

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ice
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