

The economic impact of the international activity of Scotland's Colleges Final Report

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December 2012

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Acknowledgements

This review and analysis of the international activity in the College Sector in Scotland was commissioned by Scotland's Colleges and supported by the British Council

The authors would like to thank all of the Colleges that participated in the survey, either in whole or in part.

- Angus College
 - Anniesland College
 - Banff & Buchan
 - Cardonald College
 - Coatbridge College
 - Dumfries & Galloway
 - Dundee College
 - Edinburgh's Telford College (now part of the Edinburgh College)
 - Elmwood College (now part of the Scottish Rural University College)
 - Forth Valley
 - James Watt College
 - Jewell & Esk College (now part of the Edinburgh College)
 - Perth College UHI
 - Orkney College UHI
 - West Lothian College
 - South Lanarkshire College
- The City of Glasgow College also made a return although this unfortunately came too late to include in the analysis.

We would like to thank in particular those College personnel and students who generously gave their time to be interviewed so that more detailed case studies could be developed. These included: Jason Bond, Carol Borthwick, Lucy Flynn, Lewis Fraser, Veronica Lynch, Stewart McKillop Cheryl McLaren, Stacey McLaren, Linda McTavish, Gary Page and Julia Weedon.

Thanks are also due to Emeritus Professor Iain McNicoll, Technical Adviser to the study team, and to, Michele Finlay and James White for their contributions to the work of the study and also to Kristinn Hermannsson for assistance with industry comparator data

Finally we would like to thank Lucy Young of the British Council and Scotland's Colleges staff Carol Adam, Marion McMorland and Frances Harrower for their support.

The views expressed are the authors' own and not those of Scotland's Colleges.

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Contents

	Page
Acknowledgements	
Executive Summary:	5
<ul style="list-style-type: none">• Impact of International Activity• Other key findings relating to the overall economic impact of the College Sector.	
1 Introduction	8
1.1 Background to the study	8
1.2 Aim, Focus and Scope of the Study	8
1.3 Study Methodology	9
2 The College Sector in Scotland	10
2.1 The overall size and shape of Scotland's college sector	10
2.2 Economic aspects of college work.....	11
2.3 Economic characteristics of Scotland's college sector	14
<ul style="list-style-type: none">• Sectoral Revenue• Employment• Expenditure	
2.4 Economic impact: 'knock-on' or multiplier impact generated by college expenditure	17
2.5 Economic impact attributable to international activity	21
<ul style="list-style-type: none">• Institutional Export earnings• Share of Institutional Expenditure Impact• International student expenditure - export earnings and impact on the economy	
3 Level and Nature of International Activity in the Colleges.....	28
3.1 Involvement in international activity	28
3.2 Sources of funding for international activity	28
3.3 Reported strengths of colleges in the international market?.....	29
3.4 Partnership working and support for development and delivery of international activities	29

3.5	Infrastructure to promote international activity	29
3.6	Examples of international activity highlighted by colleges as examples of good practice	30
3.7	Types of support colleges consider necessary in order to further develop international activities	32
3.8	Identified challenges or barriers for colleges regarding conducting international activities	33
3.9	Colleges' future plans and areas of international activity likely to expand	34
3.10	Comments on survey responses	35
4	Case Studies of international activity:	37
4.1	Anniesland College	37
4.2	Dundee College	43
4.3	Edinburgh's Telford	47
4.4	Elmwood College	53
4.5	South Lanarkshire College	59
5	Conclusions and Reflections	63
5.1	Constraints on the study	63
5.2	Reflections on the issues raised in the study	63
5.3	References	66
Appendices		
	Appendix 1: College Regionalisation: The Regions	68
	Appendix 2: Annotated Questionnaire 2: Level and nature of colleges' international activity	69
	Appendix 3. Data Questionnaire	80

Executive Summary

Impact of International Activity

- This study analysed the international activity of Scotland's College sector, its range and economic significance.
- The study took place during a time of extensive change for the College sector and its findings have highlighted an important part of college activity which deserves greater policy attention for the benefit of Scotland as a whole.
- Scotland's colleges engage in a wide range of international activity. They attract international students to study in Scotland (from the rest of the EU and for further afield) as well as working on collaborative educational projects with a broad range of partners from around the globe. They are also active in staff and student exchange and in EU projects and programmes.
- Colleges are important export earners with international income in the study year making up over 8% of College revenue. Total direct college export earnings in 2010/11 amounted to £64.7 million.
- Conservative estimates of the additional export earnings attributable to the off-campus expenditure of international college students amounted to a further £12.2 million. This is a very conservative estimate and represents a firm minimum.
- This brings the total export earnings attributable to college international activities to an estimated £77 million in 2010./11
- The college international business had a positive economic impact, generating jobs and output in business across Scotland and in the rest of the UK.
- The international revenue attracted by the colleges generated in total nearly 1000 jobs in Scotland *outside* the colleges, with around 200 more jobs generated elsewhere in the UK.
- College international business generated over £100 million of output in industries across the UK , the majority of which accrued to Scottish industries.

- International activity is funded from a variety of sources , from fee income and international service contracts as well as from agencies such as the British Council and EU programmes. The most active colleges have developed clear international strategies with senior management leadership. In the study year several colleges had international office support and an associated budget for international work.
- A number of colleges are leaders in specialist niche markets, with considerable potential to attract more international business and enhance Scotland's reputation in those markets
- Colleges see articulation arrangements with higher education institutions as being important for attracting international students to Scotland. Some have specific articulation agreements with universities; others would like articulation routes to be strengthened
- College engagement in international activity is not seen as being only about student recruitment or finance, International activity is seen as bringing important benefits to the colleges, to their staff and students as well as to their local communities. Staff engagement in international partnership programmes and in delivery of transnational education is considered an important part of staff continuing professional development, enabling staff to bring international perspectives to their domestic teaching. The opportunity for domestic students to participate in exchange and international placement is also seen as an important part of college international work.
- However the study also flags that such engagement is fragile and vulnerable in a changing policy environment. In some cases colleges appear to be caught in a 'perfect storm' of sectoral structural reform , economic pressure and increasingly stringent regulatory requirements from the UK Borders' Agency.
- The study has also identified existing weaknesses in the evidence base for policy making about College international activity, in particular the absence of consistent Scotland-wide data on the numbers of international (non EU and rest of EU) students studying at Scotland's Colleges.
- The evidence gathered in the course of this study suggests that the international student population of Scotland's Colleges may be considerably

higher than previously thought and this is an important point for policy makers to note. International students make a positive contribution to Scotland's economy and restrictions on college ability to recruit international students will have a negative impact on Scotland and on the diversity of the College sector.

- We recommend that the issue of inconsistent data on international student numbers is examined by the SFC's Statistical Advisory Group for Further Education (SAGE) as part of their ongoing work to improve the evidence base about college education in Scotland

Other key findings relating to the overall economic impact of the College Sector.

This study's main focus was on the economic significance of College international activity. However in order to make estimates of the economic impact of international business of the colleges the study firstly modelled the economic impact of the expenditure of the Colleges overall, treating the College sector as an industry and colleges as business entities. Major economic characteristics of the sector were examined, including revenue, expenditure and employment.

- The analysis showed the Colleges Sector to be a significant Scottish industry, with total turnover in the study year of £757m. This made the College sector larger than the Scottish Shipbuilding Industry and similar in size to the Scottish Rail Transport Industry .The sector was an important Scottish employer, directly employing over 19,500 people , which equated to 12,291 full time equivalent jobs .
- Through 'knock on' or 'multiplier' effects the college generated further output and employment in other sectors across Scotland and in the rest of the UK.
- In total the College sector generated over £1.8 billion (directly and through secondary effects) of output in the UK, with most of the output generated in Scotland.
- The college sector generated over 24,000 fte jobs in total, with around half of these being jobs directly within the College sector and the remainder being in other industries outside the colleges. The majority of the 'knock-on' jobs (around 10,100) were generated in Scotland, with around another 1500 being generated in industries in other parts of the UK.

Section 1: Introduction

1.1 Background to this study

This study was commissioned by *Scotland's Colleges*, with support from the British Council. *Scotland's Colleges* is a member organisation which supports, represents and promotes the Scottish college sector. The study began in August 2012 and ran until November 2012. The study focussed on the 41 colleges in Scotland who were funded through the Scottish Funding Council in the study academic and financial year 2010/2011.

The colleges in Scotland provide education and training across a wide range of skill and qualification levels, including a significant proportion of higher education provision. When using the term 'college sector' in this study we are including all of the activities undertaken by the colleges; we do not separate out higher education provision from further education provision.

1.2 Aim, focus and scope of the study

The aim of the present study was to conduct an analysis of the Scottish college sector's international activity and to assess its actual and potential economic and social value and impact. Scotland's colleges engage in a wide range of international activities, including providing education for international students (from the rest of the EU and from further afield) as well as working with international partners and engaging in EU projects and programmes. However the international dimension to college activity has not previously attracted a great deal of attention, being overshadowed by the much more extensive and visible international profile of Scotland's universities.

This study was therefore envisaged as the first steps in developing a baseline picture of the internationally focussed work of Scotland's colleges, including transnational education, student and staff exchange, attraction of inward investment to Scotland through recruitment of international students (both from the rest of the EU and from Non-EU countries) education-related business and leisure tourism and other services provided by the colleges.

Additionally, the study would analyse the economic significance to Scotland of the international activity of Scotland's colleges in terms of the output and jobs generated.

The study also sought to undertake exploratory analysis of the social and cultural impact of internationalisation of Scotland's colleges, in particular the extent to which the international activity of Scotland's colleges may have an impact on domestic students and businesses. This includes, for instance, consideration of the nurturing of wider cultural and economic links between Scotland and other countries. It also includes the educational and cultural benefits to domestic students of college international activity.

1.3 Study methodology

There were a number of elements involved in the study:

- Desk Research to identify and assess the extant data available on Scottish college international activity, together with financial, staffing and student data
- A two-part survey of Scotland's Colleges:
 - To obtain key financial information on international income sources, and on international student and visitor numbers that could not be obtained from published information
 - To seek information on the full range of international activities in the sector, together with sector views on challenges, opportunities and barriers to growth
- Desk Research to take an overview of previous or related studies on the economic impact and value of international activity of tertiary education as well as studies relating to the impact of internationalisation
- Using the available data to conduct economic analysis of the expenditure impact of the colleges and their international students in terms of jobs and output generated and considering the relative importance of international activity
- The model used for economic analysis would be an economic modelling system purpose-designed for assessing the expenditure impact of tertiary

education (the 'Universities UK economic impact modelling system' [1].) This system has been used for many previous studies of higher education and further education, in Scotland and in the rest of the UK.

Section 2: The College Sector in Scotland

2.1 The overall size and shape of the sector

In the study year 2010/2011 there were 41 colleges in Scotland who were funded through the Scottish Funding Council. The college sector represented a very diverse range of courses and educational provision from Aquaculture, Agriculture and Animal Care through Business Management, Construction and Engineering, Health Care, Hair and Beauty to Sport Science, Textiles and Waste Water Operations. The College sector includes smaller scale cultural curriculum provision such as that of Newbattle Abbey, Gaelic language at Sabhal Mór Ostaig together with highly industry focussed niche market courses; examples include the greenkeeping and golf management at Elmwood College(now SRUC Elmwood Campus) and the education and training support for the oil and gas industries, in Aberdeen, Dundee and Forth Valley Colleges.

There were over 300,000 students enrolled at the colleges in the study year, many on part-time courses, with a very wide range of qualifications and study levels. The college sector delivers higher education courses as well as further education – almost all colleges have some level of higher education provision (such a HNC or HND) ; several have articulation arrangements with higher education institutions enabling students to progress to universities. A number of the colleges are also partner institutions of the University of Highlands and Islands, with an additional focus on providing degree level educational opportunities across the Scottish Highlands and Islands.

Total college sector turnover in 2010/11 amounted to £757million, with 74% of this coming direct from the Scottish Government through the Scottish Funding Council. All of the colleges are non-profit-making and most are independent bodies, having been freed from local authority control and incorporated in 1992 as a result of the Further and Higher Education (Scotland) Act 1992. However with the majority of

funding coming directly from Government there is an increasing demand for the colleges to demonstrate that the public investment being made in education and training is being used to best purpose and fits Scotland's needs. Following the 2011 Scottish Government Consultation on the future of post-16 education *Putting Learners At the Centre*[2] and the 2011 Griggs review of College Governance[3] there is a wave of reform sweeping the sector, which will leave few Colleges untouched.

Scotland's colleges are undergoing extensive upheaval and restructuring; several colleges are merging to form new, larger, regionally focussed colleges or college groupings. This is being driven by the government policy belief that larger regional colleges or strategic groupings will be more efficient and effective in meeting the needs of the regions they serve. Future public funding will be linked to 'outcome agreements' between the colleges and the Scottish Funding Council, with the colleges expected to deliver against an agreed education action plan for their region. When the reform process is complete, the sector will have been reshaped into 13 Regional Groupings. Two institutions, Newbattle Abbey and Sahal Mór Ostaig will sit outside of the Regional groupings, as will land-based provision from Elmwood, Barony and Oatridge. The land-based college provision is being merged with the Scottish Agricultural College into a new *Scottish Rural College*, with aspirations to achieve university college status in the future. Further information on the new regional groupings is given in Appendix one.

2.2 Economic aspects of College Work

One of the key aims of this study was to consider the economic impact of the international activity of the colleges. In order to do this we firstly considered the many different dimensions in which colleges can have an economic impact. The role of both colleges and universities in the economy is increasingly seen by policy makers as being of vital importance - and indeed the current plans for restructuring of the college sector were described as being part of the Scottish government ambition

"...to achieve sustainable economic growth. We believe that should be the underlying theme of our reforms for post-16 education, since a high performing education and skills system is an essential component of building the workforce, and conducting the research activity we need to maintain Scotland's competitiveness."[2]

There are 4 main ways in which colleges and universities are thought to contribute to the economy. These are through:

- the impact of individual colleges or universities as businesses and the college or university sector as an industry which generates economic activity, output and jobs;
- the impact of education and training increasing the skills base and the stock of human capital through the education and training opportunities provided to young people and adults;
- through the work of the college or university having additional social, cultural and environmental impacts on the surrounding communities or wider world. Known as 'externalities', these can sometimes be 'side-effects' rather than a main goal but can be important nonetheless;
- Examples include lower crime rates or increased health as well as a sense of social 'well-being';[4]
- through education and research and the transfer of knowledge to the surrounding community (including business or industry) contributing to innovation.

Most studies of economic impact and value of tertiary education have been focussed on higher education. These have included studies of higher education as an industry generating economic activity, jobs, output and export earnings [5] , studies of human capital and rates of return to graduation [6], [7] as well as more recent work on universities and innovation.[8].

However there have also been some studies of further education and the college sector. Members of the current study team were involved in early studies of further education's impact as an industry generating economic activity. This included the first such studies of further education in Scotland [9] as well as a study of the further education sector in England. [10].The Glasgow Economic Commission have also published a study of colleges in Glasgow.[11]

In recent years there has been more of an emphasis on the human capital dimension of college education. The 2007 Review of Colleges *Unlocking Opportunity* [12] included analysis of the additional economic benefit of increasing student skills and qualifications. This was with a view to assessing the 'added value' of college education and whether the economic benefits outweighed the costs to the public purse, The analysis looked at the additional earnings return to higher qualification

levels over the working lifetime of the 2004/05 student cohort. The overall conclusions from this analysis was that there would be a positive return on public investment, with the estimated long run economic benefit to Scotland of the higher skill levels of the 2004/05 cohort to be worth around £1.2 billion (This was estimated as a rate of return of £3.20 to every £1 of public investment.)

More recently the David Hume Institute published an occasional paper about the role of Scottish further education in the labour market and wider economy. [13] This also included analysis of the long run benefit and potential impact on GDP of raised skill levels of a single cohort of graduates from Scotland's colleges.[14] This analysis also focussed on the increased human capital and higher wage premia from higher qualifications and concluded that there would be a positive impact on GDP (presented as much as a 1% rise in GDP over 8 years - a figure that also equated to around £1.2 billion).

A further study, again focussed on human capital and wage premia from college level qualifications, was undertaken in England for the Department for Business, Skills and Innovation [15]. This also came to positive conclusions, estimating the net present value of the qualifications started by FE students in England in 2008/09 to be in the region of £75 billion(projected across the working lifetimes of the successful learners).

For the purposes of the present study however, we did not focus on human capital issues but rather analysed the economic impact of the College sector as an industry and colleges as business entities. Major economic characteristics of the sector were examined, including revenue, expenditure and employment. We also included modelled analysis of the economic activity generated in other sectors of the economy through the secondary or 'knock-on' effects of the expenditure of the sector colleges, their staff and their international students. The model used was a well tried and tested modelling system previous used for analysing higher and further education impact in different parts of the UK.[1]

Of all of the available economic techniques, this approach – examining the colleges as businesses and the college sector as an industry - seemed most amenable to shedding light on the economic impact of international activity. Firstly examining college economic characteristics helps to make estimates of college export earnings. Secondly, once the overall impact of college expenditure is modelled it is possible to identify the share of that impact attributable to the international portion of college turnover. Thirdly, the expenditure of international students is also recognised as an

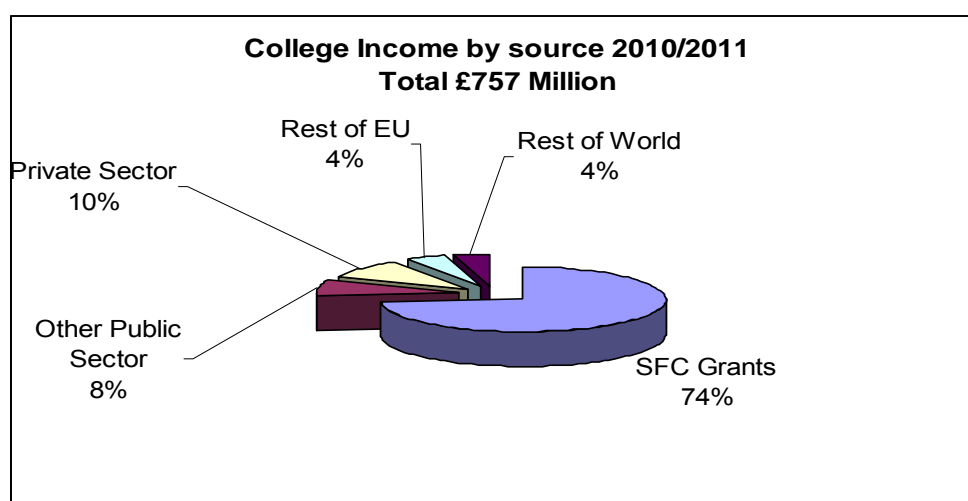
important element of export earnings. This expenditure also generates economic activity, creating jobs and output.

2.3 Economic characteristics of the College Sector

- **Sectoral Revenue**

The college sector in Scotland had total revenue of £757 million in the study year, with the large majority of its income (74%) from the Scottish Government through the Scottish Funding Council (SFC). While the fact that the sector revenue base has a high proportion of public funding is not surprising, it is important to note that the sector is not entirely funded through the SFC. More than a quarter of its income is from other sources – some from other parts of the public sector but also 10% from the private sector and 8% from international sources

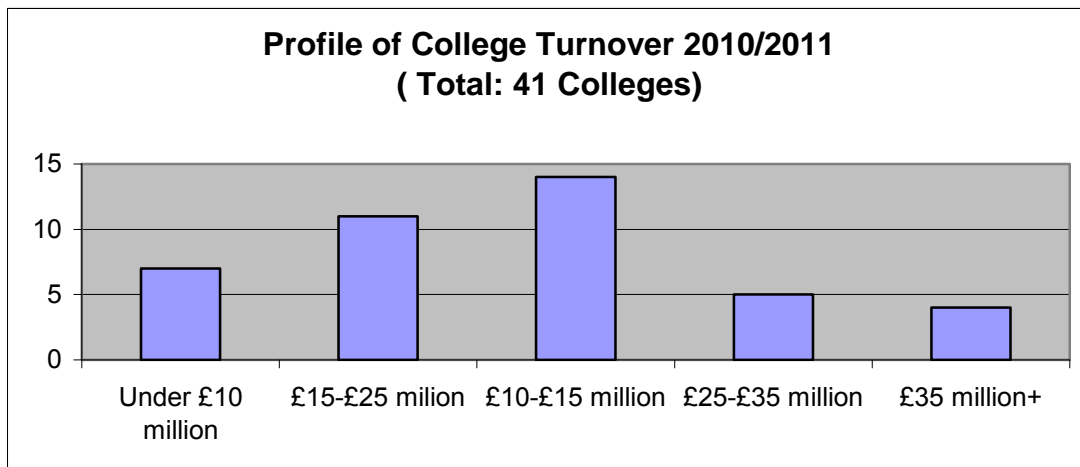
Figure 1. College Income by Source 2010/2011



Source: Estimates derived from SFC Consolidated Spreadsheet of College Financial Statements 2010-2011 combined with analysis of financial returns provided by the Colleges.

Underlying the overall sectoral picture there is some diversity, since the sector comprises colleges with different characteristics and annual turnover ranging from under £10 million to over £60 million. The main underlying trend in our analysis of income was that the larger the college the less dependent it was on the SFC grant. However even the largest colleges still derived the majority of their income from the SFC grant.

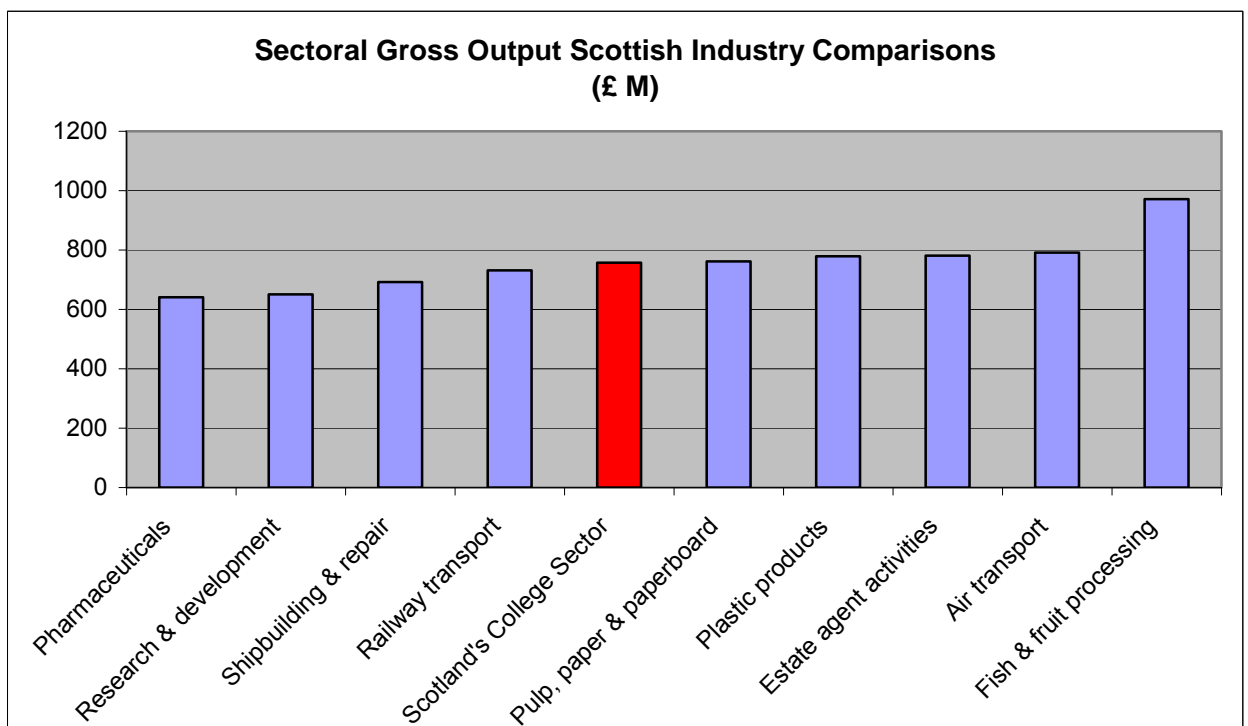
Figure 2: Profile of College Turnover 2010/2011



Source: SFC Consolidated Spreadsheet of College Financial Statements 2010-2011

In national accounting terms, college annual turnover is equivalent to sectoral gross output as defined for all firms and industries. To put the college sector into a Scottish economic context Figure 3 gives examples of similarly sized Scottish industries.

Figure 3: Sectoral Gross Output Scottish Industry Comparisons



Source: Scottish Input-Output Tables (2007)[16]

This figure shows that the college sector was slightly larger than the Shipbuilding or Railway transport industries, similar in size to the plastics products industry and slightly smaller than Estate Agent Activities or Air Transport industry.

- **Employment**

The colleges provided employment for over 19,500 people, which translated into 12,291 full time equivalent jobs.[17] Information was not available on the detailed breakdown of staffing occupations beyond a broad division between teaching and non-teaching staff.

‘ Non-teaching’ covers many different types of staff. The basic operations of even the smallest college require finance, admissions, administrative and IT support. Multi-campus colleges have extensive estates and complex IT systems to maintain with need for cleaning, security, gardeners, sports facility managers as well as requiring, for example, careers advisers , special needs support , catering and a wide range of technical staff. Hence the ‘non teaching ‘ jobs in the colleges will range from IT and other technical lab support to cleaners and gardeners. This is an important aspect of the role that colleges play in their localities as they provide employment for local people across the whole spectrum of skill levels and qualifications.

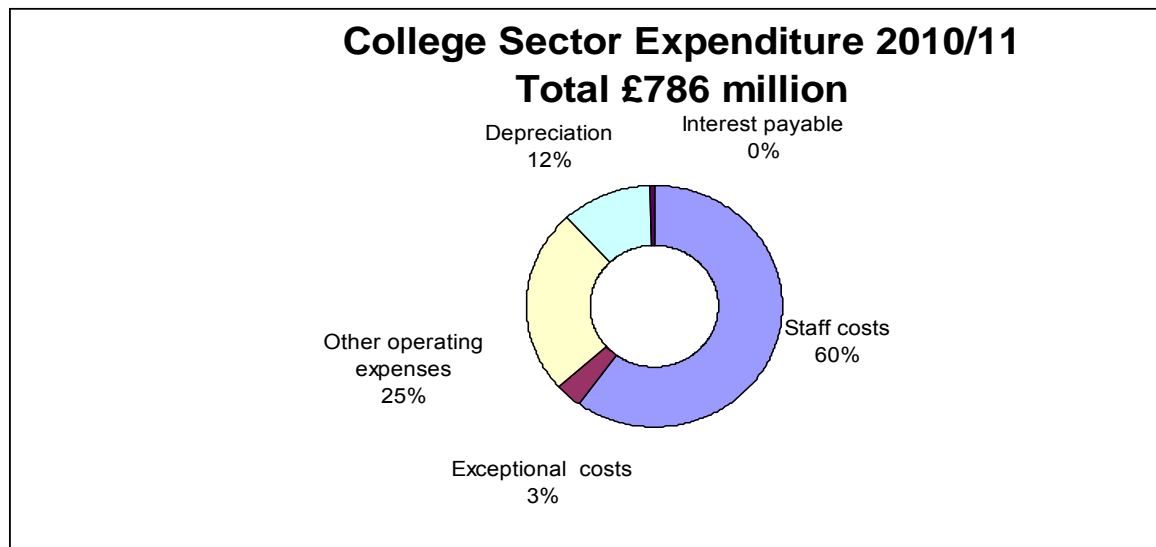
There was a ratio of approximately 55: 45 of teaching to non-teaching staff on a headcount basis. This dropped to 49:51 on an FTE or full-time-equivalent basis, reflecting that many college tutors and lecturers work part-time. A split of around 50:50 academic or teaching to support staff is typical across the tertiary sector; studies of FE in England have shown a similar ratio and the same holds for universities.[18], [19]

- **Expenditure**

Non profit-making institutions typically have expenditure that remains close to their income in any one year. In 2010/11 the expenditure of the college sector amounted to £786 million, some £30 million more than revenue in that year. The reasons for this were explained by the SFC who have indicated that there were a range of exceptional restructuring costs incurred by the colleges in that year as well as some unusually high estates depreciation costs .[20]

Staff costs are the largest element of college costs, which reflects the labour-intensive requirements of an educational organisation.

Figure 4: College Sector Expenditure



Source: SFC Consolidated Spreadsheet of College Financial Statements 2010-2011

2.4 'Knock-on' or 'multiplier' activity generated by college expenditure

The expenditure of the colleges together with the expenditure of their staff generated economic activity, creating jobs and output, through secondary or 'knock-on' multiplier effects.

'Knock-on' or multiplier effects are generally recognised as comprising two types of economic interaction:

- through a college itself buying goods and services from a wide range of suppliers (from books and stationery to legal services, laboratory equipment to catering supplies) ; their suppliers also have to make purchases in order to fulfil the college orders and their suppliers in turn make other purchases and so on, rippling through the economy.
- through a college paying wages to its employees, who in turn spend their salaries on housing, food and other consumer goods and services. This creates income for employees in other businesses and sectors, who also spend their income and so on.

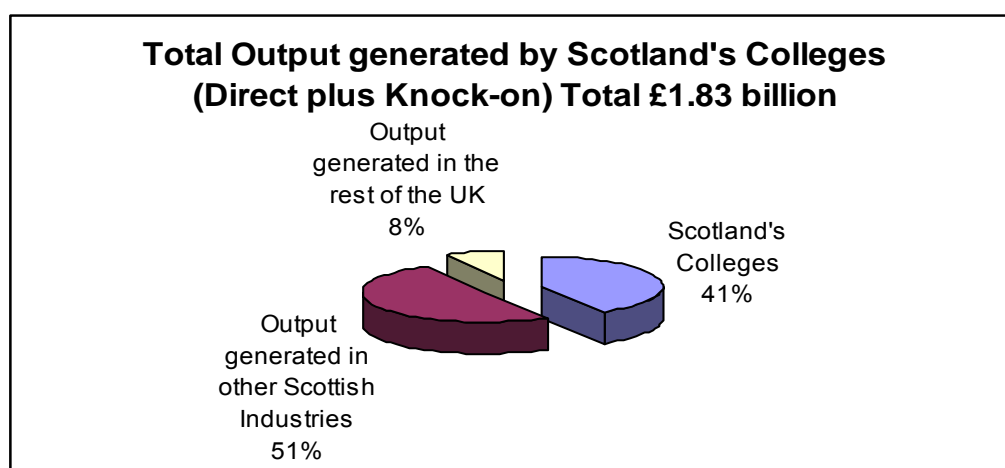
Through this type of interaction a college can become an integral part of the local economy with many jobs dependent on the work of the college.

The impact of these secondary effects can be modelled. For this study the authors employed a two stage approach to the modelling of secondary effects. Firstly the impact of the college sector expenditure on the UK economy was modelled using a purpose-built economic model of the UK. Then the location quotient method was adopted to estimate the proportion of this impact likely to have accrued within Scotland itself. The model used was a model of the UK economy which the current authors had previously constructed and designed to model the impact of higher education.[1] This was a complete type II input-output model using Office of National Statistics input-output tables. The model also included a labour market extension derived from official Labour Force Survey data. The specification of this model is available in the most recent Universities UK economic impact report. [19]

Output generated

- The college sector's own output was £757 million. Through 'knock-on' effects the colleges generated an additional £1 billion in *other* industries throughout the UK, with the majority (£0.9 billion) accruing to industries in Scotland.
- Thus the total output generated (direct and indirect) amounted to £1.8 billion, with 41% being the direct output of the colleges, 51% being output generated in other industries in Scotland , with an additional 8% being generated in other parts of the UK.

Figure 5: Output generated by Scotland's Colleges



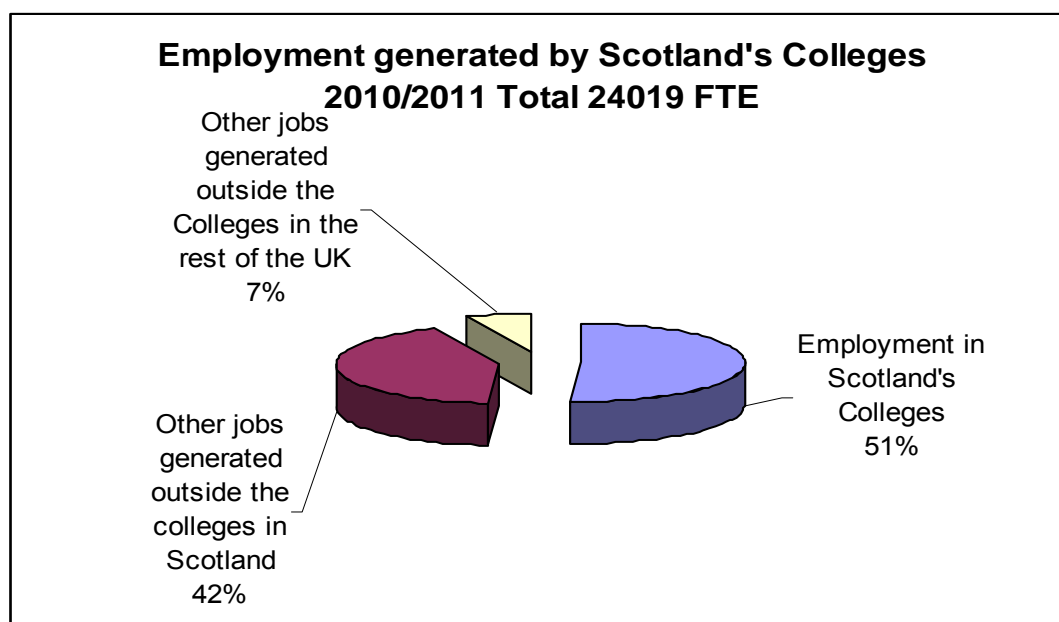
Source: Analysis derived from the Universities UK economic impact modelling system

- This indicates a UK-wide output multiplier of 2.41 (with a regional output multiplier of 2.23). In other words, for every £1 million of Sector output, a further £1.41 million is generated in other UK industries, of which £1.23 million is in industries located in Scotland

Employment

- In addition to providing over 12,291 full time equivalent (FTE) jobs directly in the colleges, institutional expenditure generated additional jobs in other parts of the economy.
- A further 11,728 FTE jobs were generated outside the colleges, with the majority (10,139) in Scotland.

Figure 6: Employment generated by college expenditure



Source: Analysis derived from the Universities UK economic impact modelling system

- The 'knock-on' employment generated indicates an overall UK employment multiplier of 1.95 (1.82 within Scotland). In other words, for every 10 jobs in a college, just over 9 further jobs were generated in other industries in the UK, of which 8 were in industries located in Scotland.

Figure 7: Summary Table of the expenditure impact of Scotland’s colleges.

Jobs in the Colleges (FTE)	‘Knock-on’ Jobs generated in other Scottish Industries (FTE)	Total Jobs generated In Scotland (College jobs plus other jobs in Scotland) (FTE)	Additional ‘knock-on’ jobs generated in the rest of the UK (FTE)	Total Jobs generated (College jobs plus all ‘knock-on’ jobs)
12291	10139	22430	1589	24019
Direct College Output (‘Turnover’)	‘Knock-on’ Output generated in other Scottish Industries	Total Output generated in Scotland (College jobs plus other jobs in Scotland) (FTE)	Additional ‘knock-on’ output generated in the rest of the UK (FTE)	Total output generated (College output plus all ‘knock-on’ output)
£757 m	£933 m	£1690 m	£141 m	£1831m

Source: Analysis derived from the Universities UK economic impact modelling system

When discussing analysis of college expenditure impact, it is sometimes pointed out that where public money is concerned, the impact on the local economy generated by college expenditure would also be generated if the public money was spent on other services rather than on the college. This is true to some extent but the argument can be overstated. The argument that it makes no difference if money is spent on college rather than on, say, hospitals, can be overstated because:

- different types of expenditure will generate different patterns of impact (for instance studies have shown that universities can be more efficient at generating impact than parts of the public sector [5]);
- where organisations attract additional non-public investment (from the private sector or overseas) on top of the public money they receive – which is true for the Scottish college sector - their final impact is not totally attributable to the public sector. Without the original public

investment however they may not be able to lever the additional private money. In this case it could be said that public investment in the colleges enables greater impact to be generated than might be the case with investment elsewhere.

See Hermannsson et al .[21] for a detailed discussion of this issue relating to multiplier impact of Scottish universities – the principles are the same for colleges.

2.5 Economic impact attributable to international activity

The previous section provides an analysis of some of the key economic characteristics of the college sector and of the expenditure impact of the sector as a whole. We will now make a closer examination of the economic contribution that international activity may make within that overall picture.

There have been some previous UK analyses of international student impact [22–24] There have also been studies of the value of the international exports of the college sector as part of an overall economic analysis of the value to the UK of Education exports. A 2011 study by London Economics for the Department for Business, Innovation and Skills [15] put a total figure on the value of UK further education exports as £1.07 billion.

While Scottish further and higher education were included in the 2011 study of exports, the international activity of the college sector does not appear to have been given a great deal of policy attention here in Scotland. Scotland's universities are very successful and visible in international markets and in carrying out many types of international activity – building overseas partnerships, research collaborations, etc. As the university sector is considerably larger than the college sector it is perhaps not surprising that college international activity has tended to be overshadowed by that of the universities and has attracted less attention. However our previous analysis of college revenue has shown that international income makes up over 8% of college income so it is still an important part of the sectoral portfolio.

One of the obvious ways in which international activity can be of economic importance is through attracting international revenue into Scotland. International revenue represents export earnings. Colleges generate export earnings through attracting overseas fee payments together with payments for other educational and general services. In addition, the students attracted by the colleges to Scotland from outside the UK spend money here, on accommodation, food, clothing, travel, entertainment and other items. Their 'off-campus' (i.e. non-fee) expenditure also represents export earnings. The off-campus expenditure of students from the rest of the EU counts just as much as the expenditure of students from non-EU countries, since they also involve transactions across the international exchanges.

Institutional Export Earnings.

To identify the college sources of income and to estimate export earnings we analysed the financial data that is available from the SFC. The SFC has some limited information on all college income by source – in terms of international earnings the SFC has clearly identified some 3.2% of income in 2010/11 (£24.8 million) as coming from non UK sources. This comprised £10.6 million in non EU fees for FE level courses and £14.2million from EU sources (mainly for other services.) However the data available from the SFC does not disaggregate all college income by geographical source and hence gives a limited picture.

We were able to combine the available SFC data with analysis of the data provided to us directly by the colleges. We had useable financial data returns from 6 of the colleges. These fortuitously came from a spread of colleges across three different income bands (Over £25 m, £15-£25m and £10-£15m) This enabled us to assess the pattern of income sources within each income band, apply these patterns to other colleges within those income bands and then make estimates of the totals.

For colleges with income of under £10m we made the conservative assumption that 97% of their income came from the public sector with no private sector income and only 3% from international sources. This was on the basis that smaller colleges tend to be more reliant on the public sector; however at least one of the smaller colleges currently holds HTS Sponsor status with the UK Borders Agency and hence there is still some activity taking place in the overseas student market.

This analysis gave an overall estimate of college direct export earnings of £64.7 million, This comprised £32.2 m from the rest of the EU and £32.5 m from non-EU sources.

Share of institutional impact

The colleges spent the money they earned from international activities and in so doing generated jobs and output in Scotland. We estimated the share of overall impact attributable to international activity as 8.2% of the total college impact (in line with its share of expenditure.)

Figure 8: Share of College impact attributable to expenditure of international income

'Knock' on Jobs in Scotland (outside the colleges)	'Knock-on' Jobs in rest of the UK	'Knock-on' Jobs Total	'Knock'-on Output generated in other Scottish industries	'Knock-on' Output generated elsewhere in the UK	Total 'knock-on' output generated,
831	130	962	£76.5m	£11.6m	£88.1m

Source: Analysis derived from the Universities UK economic impact modelling system

This shows that the international activity of the colleges generated around 962 FTE jobs outside the colleges – 831 of these in Scotland.

International student expenditure – export earnings and impact on the economy

The expenditure of students from outside the UK is an injection into the UK economy. Students make payments directly to the colleges for fees and other costs (e.g. sometimes for accommodation or money spent in campus catering facilities.) The impact of direct payments is captured within the college accounts and is included in the analysis of college export earnings and college expenditure impact. However students do not confine their expenditure solely to the college precincts but buy a wide range of goods and services away from the college. For example, students need to rent accommodation from local landlords and buy food in local shops. Even the most casual observer will note the proliferation of cafes, snack bars pubs and entertainment venues around colleges that frequently rely on student trade.

It is important to note that the expenditure of all non-UK domiciled students is relevant, whether they are from the rest of the EU or from further afield. While non-EU students pay higher fees to colleges, EU students spend money off-campus in the same way as students from other countries. Their spending is as important to the economy, generating output and employment in Scotland, as the expenditure of students from China or the USA.

To model the impact of student expenditure it is first necessary to derive an overall estimate for the off-campus expenditure of students by combining data on student numbers with data from a range of surveys of student expenditure. While this is straightforward in principle, in practice it was considerably more difficult than expected to obtain robust data on Scotland's college sector international student numbers. Consequently our estimates of student expenditure and resultant student impact are extremely conservative. This is explained below.

Student Numbers

In the course of the study it became apparent that there is a problem with student record data on international students studying at colleges in Scotland, both data on students from the rest of the EU and on students from the rest of the world. There is robust data on university students because universities make statistical returns on an annual basis to the Higher Education Statistics Agency (HESA). However there is no one agency responsible for collection of comparable statistics on College activity. We had originally considered the SFC student statistics from the *Infact* Database as likely to be the most robust or reliable source for information on student numbers. However there was a significant discrepancy between the numbers held by the SFC in the *Infact* database and the numbers of students reported to us by the colleges. For instance, for one college the FTE number for non-EU students recorded in the SFC *Infact* database appeared as 3 FTE students. The college told us that the real number was actually 182.

This was not an isolated case as other colleges we consulted also reported different numbers of overseas non-EU students to those recorded in the *Infact* database. As the students concerned were generally 'Tier 4 visa' students, for whom extensive records need to be kept, the colleges were confident in the numbers they reported to us. It was not entirely clear why these discrepancies existed. The SFC told us that they ask the colleges for data on the 'pre- study postcode' which should in theory pick up the student's originating domicile. One of the colleges suggested that the

differences may result because of the timing of data returns. If data returns are made post-enrolment the student address on college record, and hence automatically submitted to the SFC, may typically be the student term time rather than pre-study address. Hence an unknown proportion of international students, non EU and EU alike (and presumably possibly also students from the rest of the UK) could be recorded in the *Infact* database as local or Scottish domiciled students when they are not in fact local students at all.

The Colleges consulted were confident in their numbers of non EU or 'Tier 4' visa students . However they were all generally less certain about the numbers of students from the rest of the EU. One college had an indication of EU student numbers at c. 362 (the *Infact* database for the same college had only 5 EU students recorded.) Few of the other colleges had firm figures. A close track of EU students is not required for the UK Borders Agency and their fee status is akin to that of domestic students so it would seem that there has been no reason to prioritise the maintenance of records on students from the rest of the EU.

A further issue worth highlighting is that while the numbers for international students in most colleges include those taking both FE level and HE level courses, figures for students taking higher education courses at the UHI Colleges are not recorded in the *Infact* database but are separately recorded in the Higher Education Statistics Agency returns as they are classed as UHI students.

Final Student expenditure and impact estimates

Bearing in mind the limitations on student data, for economic modelling purposes we decided to take the most conservative case and used the SFC figures, viewing these as an absolutely firm minimum. For 2010/11 the SFC *Infact* database gave an FTE number of 1375 students from outside the UK – 1082 from non EU countries and 293 from EU countries. HESA [25] further gave details on the international HE level students recorded at UHI which brought the total figure up to 1595 students.

In terms of estimated student expenditure we also decided to be conservative . There are no specific available surveys of international student expenditure. There are however a number of sources for domestic student expenditure These include a relatively recent student expenditure survey in Scotland[26] which gave a figure for the median expenditure of a 21-24 year old as £8477 for an academic year. The 2011 London Economics Study of the value of Education Export Earnings [27] made alternative estimates for international student spending drawing on the International

Passenger Survey. This study gave estimates of £8700 for an EU undergraduate and £15122 for a non EU undergraduate. All of these figures relate to a 39/40 week academic year. Reviewing these figures along with a number of university and college websites that give guidance to international students on the expected cost of living, we made a conservative estimate of personal student expenditure to be in the region of £8500 per person for an academic year. We further adjusted this figure downwards to avoid any possible double-counting – where students may have incurred expenditure on campus (e.g. on catering) that would already be included in college income. This gave a final figure total of £12.2 m for the off-campus expenditure of college international students .

Our subsequent modelled analyses of the impact of the student expenditure showed that the impact of international student expenditure generated 140 jobs in Scotland (outside the colleges) and a further 23 jobs elsewhere in the UK. In other words, at a conservative estimate, the off-campus expenditure of 100 international students generates nearly 10 UK FTE jobs.

Figure 9: Estimated Export Earnings of Scotland’s Colleges in 2010/2011

Estimated Export Earnings of Scotland’s Colleges in 2010/11	
College International Revenue	£64.7m
Off-campus expenditure of international students	£12.2m
Total	£76.9m

Figure 10: Summary of expenditure impact attributable to overall College international activity.

	'Knock' on Jobs in Scotland (outside the colleges)	'Knock-on' Jobs in rest of the UK	'Knock-on' Jobs Total		Output generated in other Scottish industries	Output generated elsewhere in the UK	Total 'knock-on' output generated,
Scotland's Colleges	831	130	962		£76.5m	£11.6m	£88.1m
Share of College impact due to expenditure of international income							
Impact due to off-campus expenditure of international students (minimum level)	140	23	162		15.7	2.1	17.8
TOTAL	971	153	1124		92.2	13.7	105.9

Source: Analysis derived from the Universities UK economic impact modelling system

Section 3: Level and nature of college international activity

This section reports the findings of a survey of colleges' international activity between 2010-11. The complete responses to the questions are provided in an annotated questionnaire in Appendix 2. Fifteen of the 41 colleges returned activity questionnaires (37% response rate). However, the responding colleges varied in terms of geographical distribution, size and focus of provision and can be seen as reflecting the current international activity situation in the Sector.

3.1 Involvement in international activity (see Table Q2 for details)

The responding colleges are engaged in a range of international activity with teaching overseas students (73%), activities aimed at internationalizing the college, such as curriculum development and staff and student exchanges and visits (60%) being the most common. These findings are broadly similar to those of Baldauf *et al* (2008) [24]. Where colleges are part of university partnerships, there is evidence of international student recruitment into HE programmes rather than FE programmes with the exception of language courses.

With the exception of the exchanges and visits, these activities have increased over the past five years. International activity is more likely to involve European Union countries; however, delivering learning and training programmes via commercial contracts and commissions is more likely to be conducted with partners in non EU countries (40% Non EU compared with 27 % EU).

Delivering learning programmes abroad including those via partnership arrangements with colleges, universities and private organisations in other countries and other activities delivered via commercial contracts and commissions appear to have decreased in the past five years.

3.2 Sources of funding for international activity (see Table Q3 for details)

Sources of funding for colleges' international activity varies according to the nature of the activity but perhaps not surprisingly, the main source of income from international activity is fees from international students. European Programmes typically fund delivery of learning programmes abroad and staff and student visits along with input from colleges' own funding. Colleges use their own funding to support the

development of activities aimed at internationalising their organisation; again similar to findings of Baldauf *et al* (2008) [28].

3.3 Reported strengths of colleges in the international market (see Table Q4 for details)

Across the responding colleges the main strengths in their international markets varies and reflects their own areas of expertise but Business Administration (73%) Engineering (60%) Computing/IT (60%) and English language training (53%) are the most commonly cited strengths.

3.4 Partnership working and support for development and delivery of international activities (Table Q5, and Table Q9 for details)

Colleges report a diverse range of collaborative partners in the development and delivery of international activities. The majority report other Scottish Colleges (67%) with 60% collaborating with Project partners in EU countries. Other common partners include: the British Council (47%); Scottish Universities (40%); Scottish Development International (SDI) (40%) Scottish Council for Development and Industry (SCDI) and Students Associations (both 33%). Sixty percent of the responding colleges have a formal arrangement with higher education institutions in the UK or overseas to enable students to progress to HE.

During the past five years the colleges have used the services of a range of providers and organisations to support their international activities. Most commonly used are: Scotland's Colleges; SDI (both 73%); British Council in the UK (67%), British Council's offices overseas (60%) and other Colleges (60%).

3.5 Infrastructure to promote international activity (please see Table Q7 for details)

The survey highlighted that colleges that are active internationally possess teams or specific personnel dedicated to promoting international activity (80%). Sixty-seven percent also have a financial team in the college dedicated to supporting international activity and the same percentage have a formal strategy for international activity. Sixty percent report having a network of organisations that support their international activity.

3.6 Examples of international activity highlighted by colleges as successful and good practice

College responses identified cited numerous examples of international activity that had been successful in terms of opening new markets, securing income via student recruitment as well as enhancing the skills of college staff and benefiting the communities locally and abroad. Some of these examples are detailed in the case studies (please see Section 4) but some key themes from the open-ended responses in the survey are summarised below:

Thirteen of the 15 college respondents provided examples of international activity they wished to highlight as good practice or as particularly important to their college's international development and benefiting stakeholders.

It was apparent that some colleges had been successful in increasing range of countries that they recruited from and increasing the scale and range of curriculum areas and courses that had attracted international students. Such courses included:

- Delivering programmes overseas with articulation and progression routes to continue study programme in Scotland;
- Developing a partnership between one College and a College in Denmark that will bring about new international opportunities for both staff and learners.

While some cited achievements including lowering the risks associated with international activity and having a UK Borders Audits classifying their system as 'exemplary', one representative stated that the college had undertaken exploratory work in this area but concluded it to be 'investment hungry and high risk'. Similarly, another college representative reported that the examples they had given of successful, income generating international developments that were possible through the College's UKBA Tier 4 HTS status had been negated following changes to Tier 4 licenses, which resulted in compliance issues for small colleges. Thus the college in question has been forced to review overseas marketing and withdraw from such activity.

One College reported developing a team of staff dedicated to the promotion, recruitment, teaching, support and progression of non-EU international students. This team included a manager, administration and recruitment officer, an academic guidance lecturer who provided students with one-to-one support and remedial tuition

when needed. The team also involved a business development officer who worked with a network of international agencies. However, the college lost its HTS license and so this specialist staff team had to be disbanded because the college could not afford to maintain these specialist staff for uncertain periods of time with no income to cover costs. This is despite the same college also reporting that they had developed and implemented robust systems to support college responsibilities and duties in compliance with UKBA requirements.

However, other positive developments included:

- Increase in student and staff exchanges supported by EU project funding and college funds and also other non EU international collaborations such as contractual arrangements to provide training for the Technical and Vocational Training Corporation (TCTC) in Saudi Arabia.
- EU funded projects to develop international curriculum materials; for example, supporting training in the care of the elderly with a number of European partners. Examples include: expansion of Grundtvig, Leonardo and Comenius Learning Partnerships; Transfer of Innovation projects. These included highlighting good practice and alternative methods across a number of EU countries regarding supporting priority groups, promoting employment pathways and use of new technology to assist teachers and teacher training.
- British Council projects: These included a major project in Palestine which won a partnership award through Scotland's Colleges. This project provided Palestine training organisations, college and the education authority with guidelines and best practice examples in the development of HNC awards.
- Colleges developing and delivering a range of ESOL, cultural awareness, business and trade and other professional qualifications and techniques to numerous institutions in countries including China, India, Nepal, Egypt, Bangladesh, Poland; Spain and Italy. In one case, the partnership working that developed provided accreditation and assessments for the Egyptian College partner (TVI), to be awarded SQA status to deliver an HND in manufacturing. Since the completion of this project the Scottish College has been invited to work with the largest Steel manufacturing company in Egypt to develop bespoke training courses to train their existing workforce.
- Bespoke commercial courses for companies such as aerospace and oil & gas companies, which allow students to study at HE level and also being provided with English language support throughout the duration of their course.

- UK India Education and Research Initiative (UKIERI) project with University of Delhi and establishment of agreements for sustained collaboration.
- Project in Malawi which involved developing teaching and social areas and the delivery of an SQA unit (planning and delivering learning sessions to groups) to Malawi teachers.
- Expanding transnational partnerships, some including unique, niche markets. For example, capacity building programmes developed by one college in 'golf-developing countries' providing training for trainers, curriculum development and certification in China to bring the golf sector and education sector closer together. This college has also developed green keeping qualifications for clients in South Africa and the Middle East.
- Achieving 10 national awards for international activities in past five years. More effective support for international students and international operations.
- Developing innovative solar powered light for Nepal to address power shortages within the country and capacity building of staff within a technology institute in Nepal

College representatives also described how many of these international projects and developments had benefited staff and learners in their own and partner institutions. In one case, the EU funded EMPOWER project aimed at supporting women into employment or moving onto further/higher education was evaluated as having had a positive impact across the partnership and in particular, in Northern Ireland where it was given addition funding from DEL (Department of Employment and Labour). This project continues to be funded in NI through this department.

3.7 Types of support colleges consider necessary in order to further develop international activities (please see Table Q12 for details)

College responses reveal that the majority want support in marketing international commercial activity and Funding from Scottish and/or UK Government (both 67%). Sixty percent require more in-college personnel with appropriate experience to develop and manage international activities. Greater numbers of in-country specialists are required by 53% of colleges while 47% want advice on finance regarding conducting international activity and the same percentage would like more resources generally to develop their international activities.

In open-ended responses, the plea for support to address the impact of UKBA policies emerges again as does the recommendation for a greater strategic and holistic approach to identifying opportunities for Scotland's educational sector with greater articulation and collaboration between colleges and universities. Colleges would also appreciate greater help publicising their provision and explaining the nature of the college sector to relevant embassies in other countries. The end of certain measures such as the 'fresh talent' initiative (a Scottish Government policy framework to encourage people to settle in Scotland) is seen as making it much harder for students to get a visa following their study and so are looking elsewhere to other countries to provide continued learning opportunities.

3.8 Identified challenges or barriers for colleges regarding conducting international activities (please see Table Q18 for details)

College responses identify a wide range of challenges and barriers to their international activity. The most common of these are 'Lack of knowledge about international markets' (40%). Interestingly the same percentage state that there is no spare capacity for student recruitment and/or the college has sufficient demand from UK students. The lack of resources to develop international markets is stressed by 47% and 33% report that there is a lack of staff with appropriate experience to develop and manage international activities. However, it is in the open-ended responses to the question on challenges and barriers that we see illustrations of how these factors are having a detrimental impact on colleges' international activity and these are echoed in the case studies reported in Section 4.

Comparisons were made with universities' ability to validate their own courses which placed that sector at an advantage compared to the colleges who have to work with partners to achieve this. There is a reported lack of understanding overseas of what colleges offer and can deliver. It was argued that this also includes organisations such as the British Council who, in some countries, are seen as 'thinking that only universities deliver higher education'. The perceived asymmetrical capacities and 'privileges' of the university and college sectors was also highlighted by the some who complained that international project funding is ring fenced for HEIs when this 'could easily be relevant to colleges', particularly regarding entrepreneurial and employability projects. One respondent also noted that internationally there was a lack of understanding of government devolved responsibility in the UK regarding education and training. This was not helped when Westminster MPS and the UK

Minister of State for Further Education, Skills and Lifelong Learning visit other countries and the Scottish context is often overlooked.

However, the greatest reported barrier to growing international business is the uncertainty created by the UK Border Agency through 'continual changes being made to the regulations'.

"[We're] very concerned about the UKBA , keeping HTS status needs very tight management of risk; we try to liaise with the specific embassies e.g. China to highlight and raise awareness of our college, what we do, but it's still problematic."

College international officer

The respondents argued that the changes which have been made have had a severe impact on the UK's international student recruitment activity. The reputational damage this has caused has had a global impact, with many traditionally strong markets turning to more attractive competitor destinations. The respondents fear that the detrimental impact will be long-term and that the reputational damage will also impact negatively upon their ability to undertake international commercial activities, with the UK being perceived as a less welcoming international destination.

Other barriers were seen as limited finances and resources. One respondent stressed that they could only allocate funds to enable their college to achieve very slow international growth and 'to establish a viable alternative income stream in time to mitigate the impact of mainstream funding cuts, we would need to grow at a faster pace than we can afford to fund ourselves'.

Another college officer stressed that international business needs long term commitment to thrive and that colleges were under financial pressures which made the maintenance of long-term planning difficult. The fact that a college's' financial strategy can be different from an international business growth strategy was also highlighted as a constant challenge.

3.9 Colleges' future plans and areas of international activity likely to expand (please see Table Q10 and Q11for details)

The types of activity colleges are planning to develop and expand largely reflects their current patterns of activity. The qualitative information provided in case studies

indicates that some of the colleges are seeking to access and develop new international markets. However 7% do not plan to continue their international activity, this is mainly because of changes to the UKBA policies, which college representatives argue make it too difficult to comply with legislation and not cost-effective. Indeed, across the responding colleges 84% report that changes to UK Border Agency regulations will limit the capacity of their institutions to recruit international students. Thirty-five percent state that their college cannot afford to make the investments necessary to attract international business and 28% claim that their college does not have the capacity to expand its international activities. However, the remainder believe that their college is well prepared to further develop international activities.

Despite the pessimistic projections of a notable proportion of the colleges, the majority state that they will continue to pursue measures to develop international activity. Indeed, 70% report that over the next five years their college will be increasingly dependent upon income from international activities. The most commonly reported future types of such activity include:

- Teaching students from outside the UK at the college 67%
- Delivering learning / training programmes via commercial contracts / commissions 67%
- Staff and / or student exchanges and visits (60%)
- Activities aimed at “internationalising” the college such as curriculum development (60%)
- Delivering learning programmes abroad including via partnership arrangements with colleges/ universities/ private organisations in other countries (53%).

3.10 Comments on survey responses

The survey findings present a mixed picture. On the one hand there is evidence across the responding colleges of an increase in the past five years in the range and nature of international activity. This activity includes recruitment of international students to courses as well as transnational partnerships across EU and non EU countries to develop qualifications and progression routes, build capacity of educators, develop targeted programmes to address inequality and transfer of knowledge. The descriptive account from the survey data is backed by qualitative

insights from the open-ended questions that strongly suggest that these developments have had positive impact on learners, staff and their organisations and communities. The case studies in Section 4 provide detailed accounts of how some colleges that are particularly active internationally have achieved this and demonstrate the impact of such activity on stakeholders.

On the other hand, there is evidence from our survey that such developments are fragile and vulnerable. In some of the colleges the infrastructure and whole programmes to support and develop international activity, particularly student recruitment have been lost as a direct consequence of losing their HTS license. The challenges brought about by changes to the UKBA policies have clearly had a dramatic impact on the capacity and willingness of some colleges to invest in international activity, particularly at a time of severe economic downturn.

Some of our findings concur broadly with those of Baldauf *et al's* (2008) study [28] of international activities of UK FE colleges, which also found that colleges engage in a wide range of international activities which are not limited to teaching international students. However, while that study found that the main market was still that of teaching international students, our findings indicate Scottish colleges have more varied international activity, including substantial capacity building and knowledge exchange with transnational partners. Given, the reported challenges to recruiting international students it is possible that these types of international activity will expand at the expense of teaching international students in the UK. Like Baldauf *et al* (2008)[28], our survey also indicates that the costs for colleges of operating in international markets are high and those that appear successful in international markets have built up experience over time and have the support of investment and strategic planning.

Section 4 Case Studies of International Activity

4.1 Case study: Anniesland College

4.1.1 Brief description of the College.

Anniesland College was established in 1964 to support local industry and commerce and specialised in ship building and medical administration. Since then the college has responded to the changing needs of the local area and offers a diverse range of subjects including business & digital technologies, care, health & communities, creative industries, sport, English language and engineering & construction. The college has recently undergone a £52million rebuild. The College has a strong commercial focus, successfully working with partners at a local, European and international level. The college has worked with partners on three Prime Minister's Initiative 2 (PMI2) projects in China, Vietnam and the USA and three Skills for Employability projects in Palestine, Egypt and Tunisia.

Specialist Curriculum Areas include: Art & Design; Computing & Multimedia; Curriculum Innovation; Engineering (automotive & mechanical); English for Speakers of Other Languages (ESOL); Hospitality Management and Travel & Tourism and Training of Trainers. Currently, the College does not have a formal arrangement with any higher education institutions in the UK or overseas to enable students to progress to higher education. College income and student numbers are shown below:

Income 2010/2011	Total Student Numbers 2010/2011 (Headcount)	Total Student Numbers 2010/2011 (FTE)
£16.4 million	5068	2748

Source: Finance *SFC College Accounts* Student numbers: *SFC Infact Database*

4.1.2 International activity overview

The College's current international activity includes delivering learning programmes abroad, including via partnership arrangements with colleges, universities and private organisations in other countries; delivering learning and training programmes via commercial contracts and commissions and staff and student exchanges and visits.

Currently the College's HTS status is in hiatus as it undergoes merger with other Colleges, after which the new institution will reapply for HTS status.

During the past 5 years the college has also taught students from outside the UK at the College and has delivered other activities via commercial contracts and commissions (e.g. consultancy).

The College management believe that particular strengths in their international market include: Engineering; Business administration; Computing / IT; English language and English language training; Teacher / Teacher training; Management training; Entrepreneurship and Creative and performing arts.

The College works in collaboration a number of other organisations in the development and delivery of international activities including: other Scottish FE colleges; the British Council; Project partners in EU countries; SCDI (trade missions); UK Employers and Employers' Associations; and the SQA.

The College has a team dedicated to promoting international activity including support regarding financial aspects of international working. This is framed by a formal strategy for international activity.

4.1.3 Examples of international activity and impact

The case study sought to elicit detailed information on particular examples of good practice regarding international activity and the range of benefits for all

a) Examples of international activity and practice highlighted by the college representatives

Some of the College's most successful international activity and partnerships were highlighted as including:

EMPOWER: This was aimed at supporting women into employment or moving onto further/higher education and was seen as a very positive project across the partnership and in particular Northern Ireland where it was given addition funding from DEL (Department of Employment and Labour), the project continues to funded in Northern Ireland through this department.

Women into business: this has highlighted good practices across a number of EU countries, and looked at alternative methods and good practice in supporting this group in starting their own employment pathways; on completion the project was

awarded a good practice award in Italy. Partners included; Italy, Poland; Northern Ireland and Spain.

Careers in Transition: this project involved; Norway, France, Germany, Netherlands, Poland and the UK. The project was highlighted across the LLP as an example of good practice to support young adults and adults during the economic downturn, the project looked at various methods to prevent redundancy and national support put into place across the partnership.

PUMEC (Professional Use of Media in the Educational Context): this project addressed the use of new technology available to assist teachers and teacher training, the project was very successful and the college spin off was an invite into a Polish ESF funded project to continue with the best practices and extend the project outcomes by examining the use of ECVET across 3 partner countries.

British Council projects:

Palestine: This project won a partnership award through Scotland's Colleges, this project provided Palestine training organisations, college and the education authority with guidelines and best practice examples in the development of HNC wards.

Egypt; this project developed a new award for our Egyptian College partner (TVI), and in partnership we developed and provided accreditation and assessments for the TVI to be awarded the SQA status to deliver an HND in manufacturing, since the completion of this project we have been invited to work with the largest Steel manufacturing company in Egypt to develop bespoke training courses to train their existing workforce.

Malawi: this involved hosting a visit from Malawi and various lecturers and managers travelling to Malawi to support training methodologies and delivery lectures to both Malawi teachers/trainers and students. From management we assisted in setting up quality procedures and the promotion of a new curriculum.

b) Types of impact the international activity has had for:

- *The College as an organisation?*

The international activity, particularly transnational project work was seen as benefiting the whole college. One example was the range of Grundtvig projects. These were seen as very good for development of curricular areas because of opportunity to see how courses are taught in a European context. This allows the

College staff to “get a better critical understanding of what you do, to accept that ideas can come from outwith the system that you are in.”

- ii) To the students and staff involved?

Management believe the international activity benefits students directly and indirectly. For example, Hospitality students cater for foreign visitors and the college develops lessons around this experience. The College apprentices are invited to talk to international visitors and showcase what they're doing, thus building their skills in communication with others.

College staff are seen as benefiting from the international projects. There is considerable knowledge exchange and capacity building. It was good for the college it widens horizons for staff and makes links with organisations and companies. College strengths and activity have historically been in project work. These give staff, both support and teaching staff, development opportunities at a variety of levels.

“Staff benefit from the experience because it encourages them to ‘look outside of themselves’ and understand other cultures and reflect in their teaching...you have to ‘share ideas to get new ideas’ this is part of the philosophy of the college.”

College Principal

Staff involvement in managing the transnational projects is seen as important in that they acquire skills to run a project successfully. These are transferrable skills to their wider work and builds capacity. It is important to ensure that a range of staff are involved not just the same ones and across curricular areas.

In another example, the British Council organised a ‘speed-dating’ style event in Washington and College staff met colleagues from US and Canadian colleges. They already had a number of small projects ready to go and the College was able to be a partner with these and this led to a successful entrepreneurial project between the College and the US. Involved a partnership within the UK with Derby College and with Colleges in two states in the US and led to the creation of an ‘entrepreneurial passport’. The College set up a curriculum group embedded in Business Studies to assess lesson learned from the programme and this then influenced the wider College learning and teaching approaches and benefited all students.

While many of the projects do not bring in substantial financial rewards, they do benefit the students, including their cultural awareness, life skills and employability

and forge links with companies including Rolls Royce so there a benefits for employers to who get skilled students as apprentices.

- *Wider community/local/regional/Scotland as a whole?*

There is evidence of a global impact. For example the colleges' work in Palestine was awarded a prize by British Council and is seen as 'not just about writing academic papers' but having a real in-country impact; in this case working with the colleges in Palestine to train staff to use the substantial amount of equipment they had received from countries across the world. The college staff also helped their Palestinian counterparts to align their curriculum to the local jobs market.

An SQA qualification (PDA) for teaching in vocational areas similar to that in Scotland was used. ... College staff delivered courses in-country. They also had visits by heads of the different establishments coming into the college to see 'how a college works' and the college provided quality assurance support.

The college sector is seen by management as having a great potential to develop vocational skills in other countries and they argue, this where the College sector can complement the universities.

The SQA and its qualification have a high reputation around the world. The globalization aspect means that the college can work with a country to improve training programmes that are delivered in country. This leaves a legacy of greater trained staff in these countries. The qualification combined with hands on vocational training is of great benefit .

c) Challenges facing international activity and how College has addressed these

International markets require investment and are volatile and require partners to develop activities and ventures. However, the main challenge facing the College's international activity was seen by management as a being a lack of support from other agencies to facilitate entry into international markets. This included the changes to UK Border Agency regulations which will limit the capacity of the College to recruit international students. Despite these challenges, the management believes that the college is well prepared to further develop its international activities. Indeed, over the next five years the college will be increasingly dependent upon income from international activities. Such activities are seen as by management as benefiting staff and students and they believe that there is capacity to expand the international work.

Looking to the next five years, the College anticipates it will continue to be very active internationally with the following likely to be the fastest growing activities: teaching students from outside the UK at the College; delivering learning programmes abroad including via partnership arrangements with colleges, universities and private organisations; delivering learning and training programmes via commercial contracts and staff and / or student exchanges and visits.

“International activity is in our lifeblood here and management see it continuing in different ways. The Board are very supportive. There is life beyond the Borders Agency that connects you with the wider world.”

College management representative

While the management believes that the College is well placed to expand its international activities it believes that a number of factors would facilitate this. These include: funding from Scottish and UK Government. In particular, financial support to fund fares and accommodation to visit partner countries would be helpful. While the College bears the costs of the salaries of staff involved, travel and accommodation for visits would be very helpful. The visits are seen as key to establish effective partnership working and assess how the partnership will work and establish relationships. This then paves the way to communicate electronically. The college management also see a need for greater support regarding: advice on finance concerning conducting international activity, more in-college personnel to develop and manage international activities and more resources generally to develop international activities.

d) Researchers’ reflective comments on the factors and processes responsible for the college’s international success.

A key factor in the success of the international activity, particularly the projects appears to be the support for international activity from the College’s Board and from the City Council and the fact that the College’s management has developed a philosophy that is outward looking and committed to partnership working internationally to benefit the College and the global community. Unlike some of the other colleges, financial gain does not appear to be a key driver.

4.2 Case study: Dundee College

4.2.1 Brief description of the College.

Dundee College is the single college in Dundee, Scotland's fourth largest city. It has a wide curriculum provision, with full time and part-time provision across a range of subjects such as IT, administration, hospitality, hair and beauty, textiles, fashion, engineering, construction, design and performing arts. It provides opportunities for both further and higher education as well as having agreed articulation routes between the college and the neighbouring universities of Abertay and Dundee. The college will merge with Angus College, which mainly serves the Angus and Mearns area, in 2013/14 as part of the sector restructuring into regional groupings.

Income 2010/2011	Total Student Numbers 2010/2011 (Headcount)	Total Student Numbers 2010/2011 (FTE)
£30.8 million	16491	5894

Source: Finance *SFC College Accounts* Student numbers: *SFC Infact Database*

4.2.2 International activity overview

Dundee College is very active in international programmes, with clear ambitions for international engagement as part of its overall educational portfolio. There are 3 main strands to its international activity:

- Attraction of international students
- Delivering commercial contracts in international markets
- Undertaking transnational projects (many EU funded) which enhance the college curriculum as well as increasing the college's offer to the business community.

Dundee has engaged in partnership programmes across Europe, as well as in China, Nepal, Bangladesh, Egypt, Georgia and the US. These have included programmes as part of the United Kingdom India Education and Research Initiative, the British Council Skills for Employability programme and European Commission Lifelong Learning Directorate programmes. European programmes have included activities under the Comenius, Erasmus, Leonardo, Grundtvig and Transversal programmes. The college has also attracted support from European Regional Development Fund and European Social Fund programmes and participates in the Interreg IVb and IVc North Sea Programmes, involving all 7 countries that border the North Sea. In the study year of 2010/11 non- EU student numbers stood at around 150 FTE, with several hundred students (headcount) from other EU countries.

4.2.3 Examples of international activity and impact

a) Examples of international activity and practice highlighted by the college representatives

- Working with Balaju School of Engineering, Nepal Polytechnic Institute and Nowakot Trade School to design and develop curriculum packages that increase the employability skills of students. Staff and students in all partner institutions designed and developed an innovative solar powered light pack to address power shortages within Nepal. Additional training for capacity building of staff within a technology institute in Nepal was undertaken to provide the skills and expertise to enable product manufacture in Nepal.
- Delivered international Business and Trade HN qualification in China
- Delivered English Language Cambridge Teaching Knowledge Test (TKT) to ESOL teachers in Kazakhstan
- Developed and delivered Health and Safety qualifications within India in partnership with Shell.
- Delivered motor vehicle qualifications in Industrial Technology Institute in India
- Developed Joint curriculum in textile design utilising the theme of Jute in India
- Delivered food hygiene curriculum in Bangladesh

- Delivered a cultural awareness programme for the hospitality industry in Georgia

b) Types of impact the international activity has had for:

- *The College as an organisation?* The college has been developing new markets and been able to identify commercial opportunities which assist in diversification of income. International programme opportunities enhance the attractiveness of college as a destination for domestic students as well as raising the profile of the College at home and overseas.
- *To the students and staff involved?*

International activities have been important in developing the learning opportunities for students – for instance giving students the chance to work on real life projects, such as building prototypes in the Nepal Solar Power Pack project. Exchange and outward mobility opportunities including work placements abroad also increase the employability of students, raising aspirations and broadening their horizons. For staff there have been considerable benefits in terms of continuing professional development (and this feeds back into the teaching process.)

- *Wider community/local/regional/Scotland as a whole?*

The college is firmly rooted in its home city of Dundee, with a strong sense of city identity. As well as bringing international revenue into Scotland and into the city, the college's international programmes contribute to the development and enhancement of the 'Dundee' brand. The college works with the two city universities and the city council in promoting the city as well as the college. The international partnerships of the college are mutually beneficial to the college and city as well as to the international partners. Some projects have drawn explicitly on the city traditions such as the JUTE Joint Upskilling for Training and Employment project which allowed staff and students from Dundee College and from South Delhi Polytechnic for Women to work together; Dundee students benefited from master classes in traditional Indian textiles and Dundee staff ran masterclasses for South Delhi students, raising awareness of Dundee's textile heritage.

c) Challenges facing international activity and how College has addressed these

Dundee College holds UKBA Highly Trusted Sponsor (HTS) status and the maintenance of this status is essential for continued recruitment of non-EU students. UKBA have introduced stricter regulations for colleges and college students compared to universities (for instance college and HND Level students are only allowed to work for up to 10 hours per week to supplement their income compared to up to 20 hours for university students); this makes recruitment more difficult. This does not only affect Dundee College - there has been a negative impact on the reputation of the UK as a whole from UKBA restrictions on international student recruitment and potential students are going to other countries to study rather than the UK. The college has changed its recruitment practices to comply with UKBA regulations and reviewed its overseas agents network. The negative impact of UKBA restrictions on the college has been very tangible. In the project study year of 2010/11 Dundee had over 150 non-EU students. This has dropped over the past two years to 24. The college is seeking to consolidate numbers and gradually regain ground. The smaller numbers involved make the management of the UKBA process more difficult – there is a much smaller margin of error, just a very few applicants being refused visas or not completing their qualification would affect the college's standing.

There is an ongoing challenge of resources to invest in the development of international activity, International development is a long term investment and requires longer term commitment. This is particularly difficult in the current economic climate with resource constraints and with the drop in revenue from the fall in international student numbers. The college has one international officer and has sought to support international work by integrating it with other activity across the college.

d) Researchers' reflective comments on the factors and processes responsible for the college's international success or otherwise.

Dundee College has developed a clear strategy and vision for its international portfolio, identifying realistic goals as well as assessing the risks involved. The college has had a proactive approach to applying for external funding for international projects, most of which have been focused on collaborative partnerships for skills development. There has been a drive to ensure domestic students are involved,

giving them more opportunities to experience other cultures and working conditions and improve their employability. This has cut across many different areas of the college's work from performing arts to engineering. The lasting impression is of a college that is trying to seriously embed internationalisation within its portfolio and to work collaboratively to achieve this. There has also clearly been strong leadership and governance support for international activities. The Dundee City Council also recognises the contribution the college makes to the city which provides a supportive external context. Key future challenges are likely to be in relation to the maintenance of non-EU student numbers and the future merger with Angus College – it is not yet clear how the new merged college will seek to develop its international strategy.

4.3 Case study: Edinburgh's Telford College (now part of the new Edinburgh College)

4.3.1 Brief description of the College.

Edinburgh's Telford College was established in 1968 to support training for local industries and businesses in Edinburgh. The establishment of a new College for the Edinburgh City Region became operational from October 2012, with the Edinburgh's Telford College merging with Jewel and Esk College and Stevenson College Edinburgh. Edinburgh's Telford College income and student and staff numbers for the study year of 2010/2011 are shown below:

<i>Income 2010/2011</i>	<i>Total Student Numbers 2010/2011 (Headcount)</i>	<i>Total Student Numbers 2010/2011 (FTE)</i>	<i>Staff Numbers</i>
£34.6 million	12058	6702	c 600

Source: Finance *SFC College Accounts*; Student numbers: *SFC Infact Database*; Staff numbers: *College sources*.

The college has won numerous awards for its international activities and is the current holder of the prestigious Association of Colleges (AoC) Beacon Award, sponsored by the British Council for International Student Support and was the first college in Scotland to achieve the AoC International Charter. Courses are taught at their new £80 million state-of-the-art campus which is home to a modern learning

environment and is one of the largest in Scotland. The college also provides extensive support for all international students prior to arrival in the UK, upon arrival and whilst studying.

The college has worked with transnational education partners based in India, China, the Philippines, Nepal, South Africa and the Middle East and new markets being explored in Canada, North and South America. Edinburgh's Telford College is funded by the Scottish Funding Council and has successful working partnerships with the Chambers of Commerce, Sector Skills Councils and with local, national and international employers. When the three Edinburgh colleges merged on 1st October, their UKBA licences were made dormant. This meant that all current students could finish their programmes on their current visas. The newly merged Edinburgh College applied for, and has been awarded, HTS status. Specialist Curriculum Areas include strengths in Business Administration and Finance; Construction and Heritage Skills; Engineering; Health; Hospitality; Creative and Performing Arts and Dental Technology and Dental Nursing.

4.3.2 International activity overview

Within the past 5 years the College has developed a diverse range of international activity. This has included teaching students from outside the UK at the College, staff and student exchanges and visits, consultancy work and knowledge transfer projects. The college has a particular, transnational education model. This sees students starting their course in-country with a foundation level and then progressing to attend the College. The College can not provide complete in-country delivery at the moment because they are not an awarding body like a university.. The model requires partnership working with in-country private organisations, colleges, universities and entrepreneurs.

“The College has worked with a number of entrepreneurs to set up new institutes. In these partnerships, the College supplied the intellectual property of course design, course materials and assessments and delivered staff training and the partner was responsible for the infrastructure. The College has multiple partners in China and India where we have [partner] universities, vocational colleges and schools. Students achieve dual qualifications for example students in China studying Dental Technology are awarded the Chinese national award and also a Telford College foundation certificate. Students can then progress to Scotland to complete the HND Dental Technology.”

The range of provision and opportunities for progression are seen by staff and students as important features in attracting international students and promoting positive outcomes for them. Graduates of Higher National courses are offered clear progression routes to higher level courses at the College, or to partner universities around the UK

The College actively collaborates with a range of other Scottish UK FE colleges and universities in the development and delivery of international activities. There is a notable infrastructure within the College that supports and promotes its international activity and this is underpinned by a formal strategy for international activity supported by College management. This is enhanced by a network of organisations and in-country agents that facilitate such work. In the past five years, the College has used the services of a wide range of organisations to promote its international activities including: the British Council; Foreign Office; Association of Colleges; Scotland's Colleges; Scottish Development International (SDI) and Scottish Council for Development and Industry (SCDI).

4.3.4 Examples of international activity and impact

The case study sought to elicit detailed information on particular examples of good practice regarding international activity and the range of benefits for all

a) Examples of international activity and practice highlighted by the college representatives

Some of the College's transnational partnerships were highlighted as including:

- UKIERI project with University of Delhi; the College is now their Scottish College of choice.
- delivering programmes overseas with articulation and progression routes to continue study programme in Scotland.

b) Types of impact the international activity has had for:

- *The College as an organisation?*

A key impact has been the income generated by the international activity. Over the past five years, the College has secured c£7 million from such activity, not including mobility projects. The international team believes that this activity should also be

beneficial to the wider College and partners and various developments such as curriculum design have benefited teaching and learning across the College.

The reputation of Telford College has been promoted internationally as the activity has acted as a springboard for innovation such as the creation of online materials which has increased interest from new partners, created new courses and promoted employability which is a major issue for many of the countries. It is anticipated that this will lead to student recruitment which in turn will provide further income.

- *ii) To the students and staff involved?*

Student feedback frequently makes reference to the quality of teaching and support and the opportunities to access work experience as being particularly positive features of the College's international courses.

Student comments and testimonials highlight high levels of satisfaction with the college environment and courses. The teaching and learning approaches and facilities available were also praised. Students saw the diversity in the college as a positive feature of the college community and promoted greater awareness of other cultures.

"Telford has a lot of international students from all across the world. It's a great place to meet people and learn about different cultures."

Male Indian student

The benefits for all students from working in a multicultural College community extended beyond global citizenship and facilitating global employees; this environment promotes understanding about different cultures and so prepares students to work within multinational companies.

The new courses that have been set up due to international interest have allowed Scottish students to access these new course opportunities. The clear employability routes facilitated by most of the courses are seen by staff and students to be extremely important given the current economic context. The students get international work experience for their CV which makes a difference to their employability prospects when they return to their country. Employers are also said to benefit from the internships and student work experience. Not only are they getting highly motivated personnel but their awareness of different cultures is enhanced.

The international team report that college lecturers and support staff have benefited from the College's international activity in a number of ways. The involvement with overseas students has meant lecturers are more reflective in their practice and have had to scrutinise how they can best meet the diverse needs of the international students. This reflective practice, however, is seen as benefiting their wider student population. However, there is also a need for on-going training to help teaching staff to understand how cultural differences influence students approach to learning and how teaching approaches can respond to this.

- *To the wider community/local/regional/Scotland as a whole?*

The local community benefits from the presence of people from other countries that allows locals to better understand other cultures. The team believes that the numerous awards won by the College and success stories of individual international students have highlighted the success for the sector and Scotland.

The international activity is seen as having benefits for local employers via the internships, Real Work Experience Centres and projects, mentoring schemes and the College's Job-Zone. These and the vocational courses facilitate interaction with the industry sector which while promoting students' employability and portfolios allow employers to experience international personnel and the skills and qualities they bring. This experience also sensitises employers to working in a global market.

c) Challenges facing international activity and how College has addressed these

The College representatives believed that their systems and proactive strategy and marketing had helped address many challenges growing their international activity. However, there were still particular challenges and barriers. These were summarised as being:

- Colleges tend to deliver nationally devised programmes and there are barriers to what can be delivered overseas (unlike universities who validate own courses);
- Lack of understanding overseas of what colleges can deliver – this includes organisations such as British Council who, in some countries, often think that only universities deliver higher education (some project funding has been ring fenced to HEI's when could easily be relevant to colleges e.g. entrepreneurial and employability projects);

- There is also a lack of understanding of government devolved responsibility in the UK e.g. education and training. This becomes evident when Westminster MPs travel overseas e.g. UK Minister of State for Further Education, Skills and Lifelong Learning.

However, one of the biggest challenges for the College was seen as the recent changes to UKBA policies. The international team also called for the government to examine the level of overlap and duplication of international activity it funded. It was suggested also that a more strategic and holistic approach to international activity is required at national level, including identifying opportunities for greater articulation across the HE and FE sectors in Scotland. The College representatives believe that in order to develop its international activities further it will need more in-country specialists, support for its international marketing and greater funding and support from the Scottish and UK government. While the international team appears to be generating and sustaining new international activity they believe that more personnel specialising in this field would further enhance their work.

Looking to the next five years, the College anticipates the following will be the fastest growing international activities:

- Teaching students from outside the UK;
- Delivering learning programmes abroad including via partnership arrangements with colleges/ universities/ private organisations in other countries;
- Delivering learning / training programmes via commercial contracts / commissions;
- Delivering other activities via commercial contracts / commissions (e.g. consultancy);
- Staff and / or student exchanges and visits;
- Global partnerships (non-direct profit making);
- Activities aimed at “internationalising” the College; e.g. curriculum development, special projects.

d) Researchers’ reflective comments on the factors and processes responsible for the college’s international success or otherwise

The case study has highlighted a number of factors and features that appear to be important in the success of the College's international activity. The Colleges' international activity model is fundamentally a business model predicated on providing an income stream. This ensures that activity is self-funding. The international team are particularly active in working in-country to develop partnerships with agents and providers, this promotes awareness of the College, networking and facilitates recruitment and provision of foundation courses. This "growing from the ground up" is seen as an important factor in the success of the recruitment. The College, therefore, has very active marketing and market research processes to project the colleges internationally and to assess demand in countries and new markets.

Importantly, the international strategy is supported by the College's senior management and the strategic vision is backed by rigorous market intelligence. The devolved management approach in the college appears to promote creativity and flexible response to dynamic international markets.

4.4 Case study SRUC Elmwood (Formerly Elmwood College)

4.4.1 Brief description of the College.

Elmwood College was established in the early 1950s and since then has developed into one of the UK's leading education providers to the rural and agricultural sectors. Today Elmwood remains the only provider of full-time greenkeeping vocational studies in Scotland. It has three campuses in and around the Cupar area in North East Fife. It is the only College in Scotland to have its own golf course and clubhouse.

Income 2010/2011	Total Student Numbers 2010/2011 (Headcount)	Total Student Numbers 2010/2011(FTE)	Staff Numbers
£10.6 million	3059	1254	c 380

Source: Finance *SFC College Accounts* Student numbers: *SFC Infact Database* Staff Numbers: Former *Elmwood College* website

Elmwood's main range of courses have been centred around their rural and agricultural heritage including animal care, conservation, horticulture, greenkeeping

and other golf industry related courses but they also deliver courses in other sectors such as hairdressing and beauty, health and care, hospitality and management development. Their mission statement is “Inspiring learners, excelling in learning” but their aim to be a “national and international centre of excellence for land based and golf industry education” best describes their main area of expertise. In October 2012 Elmwood merged with Scottish Agricultural College, Barony and Oatridge Colleges to form the new *Scotland's Rural College* (SRUC). Its land-based and golf industry education provision are now part of the new SRUC whereas non-land based provision will be absorbed into the new Fife Regional college group(Adam Smith College and Carnegie College.)

4.4.2 International activity overview

Elmwood College has developed a formal strategy for international activity which is highly targeted. The strategy is primarily focussed on the international golf industry, so much so that the strategy is also known as “The Golf Strategy”. The College has a Director of International, Golf and Student Services, who is responsible for the promotion of Elmwood’s international activity and is the key driver behind the strategy. Elmwood have their International Office based in St Andrews, the home of golf, situated alongside the 18th green on The Old Course, a prime location to host overseas guests with a specific interest in the golf industry.

The majority of Elmwood’s international activity has taken place in golf developing nations such as China and India where they are helping to ‘grow the game’ through education; however in recent years some of Elmwood’s international activity has offered an additional option of internet based courses. Elmwood now offers HNC and HND courses in Golf Course Management which can be done online and via distance learning. By doing so Elmwood have attracted greenkeepers and course managers who are already in full-time employment and would like to continue their studies but are unable to commute to a college on a regular basis.

Although Elmwood have focussed their international activity on their niche market of golf industry specific subjects, the vast majority of international students are involved in the greenkeeping and golf management courses rather than in performance golf. It is anticipated that more international students will apply for the Professional Golf courses in future as this is the younger part of the curriculum offering. The Professional Golf Courses are currently available on a full-time basis whereas many

of the green keeping courses can be done part-time to suit staff who are already in full-time employment.

4.4.3 Examples of international activity and impact

The case study sought to elicit detailed information on particular examples of good practice regarding international activity and the range of benefits for all

a) Examples of international activity and practice highlighted by the college representatives

The College has played a key role in capacity building programmes for golf education and has developed strong links with industry bodies.

- **The R&A (Golf's International Governing Body)** has financially supported Elmwood's China Project for the last 10 years. A great deal of Elmwood's international activity has taken place in golf developing countries such as China, India and some Eastern European countries. In this sense the R&A share a common interest with Elmwood and see this as an opportunity to help grow the game internationally. The partnership with the R&A in China was a capacity building programme which, as an emerging golf developing nation, provided training for trainers, curriculum development and certification bringing the golf sector and education sector closer together. The R&A also help to fund international students in a more direct way through bursary and scholarship schemes. Greenkeeping students who apply successfully can gain a bursary which can contribute towards tuition fees, accommodation costs, travel, books, subscriptions or attendance in relevant industry events. In return bursars are asked to be an ambassador for the R&A and the sustainable golf agenda as well as contribute to an online discussion forum to keep the R&A and Elmwood well informed of their career progress.
- As well as the partnerships formed in the China/India Projects Elmwood also has a number of collaborations and agreements which allow it to deliver education to its niche market both internationally and domestically. These include articulation opportunities with Abertay University and UHI, industry links including with the Club Managers Association of Europe, the Greenkeepers' Training Committee, the British and Irish Golf Greenkeepers' association, the Golf Course Superintendents' Association of America, and

the Federation of European Golf Greenkeepers Association.

- In 2009 Elmwood entered into a ground breaking two-year partnership with Kainuu College in Finland, Kauno College in Lithuania and Benesov College in Czech Republic to provide a consistent qualification in greenkeeping, endorsed by FEGGA. This qualification will be recognised across the EU making it possible for greenkeepers in every member state to work within the golf industry in another member country.

b) Types of impact the international activity has had for:

- *The College as an organisation?*

Elmwood's international activity has made an impact on the college in a number of ways. Since 2000 where Elmwood made its first real breakthrough internationally with the China/Scotland Golf Project the profile and reputation of the college has grown both domestically and internationally. This growing reputation as a premier education provider to the international golf industry has enabled Elmwood to form successful many partnerships and collaborations

The growing reputation of Elmwood internationally is also a valuable asset when attracting students to come from overseas. An example of this is shown in the greenkeeping staff from Iceland. Elmwood, without any formal agreement or partnership, trained the vast majority of greenkeeping staff from Iceland. Through word of mouth and reputation Elmwood had a steady flow of greenkeeping students from Iceland. This relationship has now been partly formalized with the Icelandic Greenkeepers Association being one of the 21 nations who are a member of the Federation of European Golf Greenkeepers' Association (FEGGA.)

- *ii) To the students and staff involved?*

Interviews with a number of Elmwood students revealed that Elmwood's international work in golf-industry specific areas was very important to the domestic students studying golf-related subjects . All of the golf industry students had a strong awareness of Elmwood's international activities and an in depth knowledge of the courses which Elmwood were delivering abroad and of the opportunities for outward mobility, placements and exchanges.

“Opportunities of working abroad are what inspired me to go to Elmwood, the unit on international turf grasses is specific to what I want to do”.

NC Greenkeeping Student

The two Scottish domestic NC Greenkeeping students interviewed were very specific about the benefits could be gained from Elmwood's international activities: a) the internationally focused curriculum which equips students with the knowledge necessary to work as greenkeepers in other parts of the world and, b) the opportunity to undertake work placements abroad. One student had already completed a 6 month placement at a Final Qualifying venue for the Open Championship and the other has aspirations of doing the same 6 month placement abroad. Ideally he would like to go to Florida and complete his placement on a Jack Nicklaus designed golf course.

“Although I plan to work close to home, learning about warm soil grasses might be useful to me later in my career”.

NC Greenkeeping student

Students from other subject areas such as animal care and beauty therapy who were interviewed were not as aware of Elmwood's work in delivering courses abroad, however all interviewees were aware of Elmwood's links with China. While the international dimension to Elmwood had not been a factor in the 'non-golf' students' decisions to study at Elmwood they felt that the international links added to the cultural diversity of the college and liked events such as the celebration of Chinese New Year involving all students.

“I think having international students at Elmwood improves the learning experience for local students”

Former Beauty Therapy Student

- *To the wider community/local/regional/Scotland as a whole?*

Scotland is the 'home of golf' .Golf as a sport is important for Scotland's international image and golf as an industry is important to Scotland's economy. Elmwood's provision of golf-related education courses brings both economic and reputational benefits to Scotland as a whole – particularly in terms of showing how Scotland promotes good environmental management in greenkeeping. When asked *“What benefits do you think there can be from Elmwood's international activities?”* all the Elmwood students mentioned the college gaining finance from abroad and also foreign students bringing money into the local community.

c) Challenges facing international activity and how College has addressed these

Entering into international markets often requires long term commitment to relationship building and financial investment to support the development of partnerships. There is a constant pressure on resources needed(in terms of staff time as well as finance) to keep the international links working well and resource pressure – particularly in terms of developing staff with the skills and experience to manage the activity - limits capacity for growth. There can be a tension between the support needed to deliver the international strategy and the broader college drive to make short term savings.

Elmwood also has limited capacity in terms of delivering commercial contracts abroad mainly because they cannot deploy enough staff members to each location. In order to overcome that they are expanding distance learning and certification for courses (particularly CPD courses) delivered by third parties abroad.

Another challenge facing Elmwood is the position relating to the UK Borders Agency and the maintenance of Highly Trusted Sponsor (HTS) Status. This requires very tight management and monitoring, particularly when the UKBA rules change frequently. There is a high degree of risk involved and Elmwood has to be extremely careful about making offers – even when a student has met all the entrance criteria there is no guarantee of their student visa application being successful. There are relatively small numbers of students involved and one visa refusal could jeopardise the College's HTS status . Elmwood have tried to raise awareness of the College and the specialist nature of its courses with the relevant Embassies and Consulates (e.g. in China) so that Visa Officers better understand the context of student visa applications.

A further issue has been the difficulty of having FE qualifications recognized abroad and the College's status recognized. It is hoped that the move to being part of the SRUC will help improve the position as the organisation has aspirations to have University Status/Degree authority within the next two years

d) Researchers' reflective comments on the factors and processes responsible for the college's international success or otherwise

Elmwood has established a respected name and international reputation in golf-industry circles . It has done this over a long period of time, building on its specific

strengths and through targeted and focussed efforts to build collaborations with industry partners in the UK and abroad. It has the support of Golf's international governing body the R & A which also wishes to promote and encourage the growth of golf as a sport across the globe as well as sustainable environmental management of golf courses worldwide. The support of College senior management and a dedicated Director of Golf have helped establish and maintain this position. Golf as a sport and as an industry is very important to Scotland's economy and international standing. There are many opportunities for Elmwood within the new SRUC to develop valuable international business of benefit to the new SRUC and to Scotland – building for example on potential links through the 2014 Ryder cup coming to Scotland as well as the 2013 Open Championship at Muirfield. However such high profile activity requires ongoing support and the international 'golf strategy' has to be seen as an element of a strategy for longer term success, which fits with the new SRUC financial strategy.

4.5 Case study: South Lanarkshire College

4.5.1 Brief description of the College.

South Lanarkshire College origins go back to 1948, when it first opened as the School of Building. Subsequently renamed Cambuslang College, it became South Lanarkshire College in 1999. The college is based on a modern campus in East Kilbride, which was opened in 2008. Like most other Scottish Colleges it is a registered charity. The college has high aspirations and ambitions for raising levels of student achievement and ensuring a positive student experience. The college aims:

“ To ensure learners are well prepared for the future by developing their skills, knowledge and understanding in a high quality learning environment. “

South Lanarkshire College Mission Statement (From Strategic Plan 2011-2015)

The college has a wide range of education provision, including: Accounting and Business subjects; Construction Management; Building Skills; Health Care; Beauty Therapy; Hospitality & Professional Cookery. It provides courses leading to both further and higher level qualifications as well as a range of professional certificated courses. The college also has specific articulation agreements with some higher

education institutions, notably Sunderland University, as well as running a 'pre-masters' preparation course specifically for international students .

The college will become part of a Lanarkshire Federation of Colleges as part of the regionalisation and restructuring of the college sector but will retain its separate identity as South Lanarkshire College.

Income 2010/2011	Total Student Numbers 2010/2011 (Headcount)	Staff Numbers(FTE)
£11.7 million	5348	214

Source: Finance *SFC College Accounts* Student numbers: *South Lanarkshire College Annual Report 2010/11*, Staff numbers: *South Lanarkshire College Sources*

4.5.2 International activity overview

South Lanarkshire College engages in a broad range of international activity. This includes attracting international students (from the rest of the EU and from outside the EU) to study at the college, engaging in staff and student exchanges and in commercial training activity. There are currently over 150 students from outside the EU studying at the college. Activity is supported by international student fee income, EU programmes and other commercial activity. As internationalising the curriculum is part of the college's ambitions for high student attainment the college reinvests some of its own funds in related international activities.

The main strengths of the college in the international market are Construction, Business Administration, English Language Training, Computing/IT and Hospitality although it is an aim of the college to gradually increase the range of subject areas to which international students are recruited.

The college works in collaboration with a number of other organisations to achieve its goals. These include project partners in EU countries, other UK FE colleges, and agencies such as the SCDI and the British Council.

4.5.3 Examples of international activity and impact

a) *Examples of international activity and good practice highlighted by the college representatives*

A key area of good practice highlighted was that the college's international activity is seen as a core part of its portfolio and the college has consequently invested in the

infrastructure and systems required to support its international work. This includes having devised robust systems for management of recruitment to ensure compliance with UKBA regulations and investment in international student support. The college holds Highly Trusted Sponsor (HTS) Status and the UKBA has described its systems as “exemplary”.

All prospective international students are individually interviewed as part of the recruitment process, either in-country or by Skype. Each student receives extensive personalised practical orientation support on arrival and pastoral support throughout their period of study.

b) Types of impact the international activity has had for:

- *The College as an organisation? .*

International work is an important part of the College’s income base, with nearly 8% of income from international activity. This includes both fee income and income from EU programmes and service contracts. However the international income, while welcome, is not the main purpose of international engagement. International recruitment, exchange and other business is seen as integral to the college’s educational aims, including embedding international perspectives into all parts of the college. Hence there is also an aim to widen the subjects to which international students are recruited so that there is more of a spread across the college.

- *ii) To the students and staff involved?*

There are exchange and continuing professional development opportunities for domestic students and staff. While international students frequently require a higher degree of support than domestic students, the experience of students from different cultures studying together benefits all those involved, as it encourages a broader vision and looking at issues from a different angle.

- *To the wider community/local/regional/Scotland as a whole?*

Impact on the wider community – environmentally, economically and socially - is an important matter for South Lanarkshire College, which sees itself as an integral part of the local community. Local businesses benefit from international student expenditure and the college’s international links can have spillover benefits for the local community and local businesses.

c) Challenges facing international activity and how College has addressed these

International business can be risky – particularly if a college has too much dependence on international income or on recruitment from any single part of the world. South Lanarkshire has sought to promote careful management of growth and to diversify its international business; this includes increasing the range of countries from which students are recruited and the portfolio of subjects to which students are attracted. The college is also very careful to protect its reputation and ‘brand’ – it does not currently plan to engage in franchising or validation of courses internationally.

The college would welcome support to help increase its access to overseas markets. Scottish Government support for the promotion of Scotland as a study destination would be helpful as well as in getting recognition for the college, particularly in China. Overseas governments do not always recognise colleges as higher education providers, only recognising universities. It would also help if agencies such as the British Council gave more opportunities to promote Scotland specifically and present the different educational opportunities possible in Scotland compared to those in the rest of the UK.

d) Researchers’ reflective comments on the factors and processes responsible for the college’s international success or otherwise.

The college has a clear strategy for its international work, which carries full senior management backing and college willingness to invest to deliver the strategy. There is an emphasis on careful management of risk, with investment in resources to help manage the UKBA regulatory processes and putting considerable effort into student support and related services. It has an infrastructure to support international activity and International Office staff have senior management backing.

There is a level of personal attention and support given to international students, both in the recruitment stages and once they have arrived to study, that would not always be possible in larger institutions. This approach has meant that the college feels confident in its ability to manage the UKBA processes and can point to having received praise from the UKBA for its ‘exemplary systems’. The college is aiming for a ‘steady growth’ in international student numbers but not to exceed the numbers the college feels it can manage within current structures.

Section 5: Conclusions and Reflections

5.1 Constraints on the study

The study proved to be more difficult than originally anticipated. This was due in large part to the timing of the study, which took place during a period of considerable upheaval and transition in the College Sector and even within Scotland's Colleges itself as an organisation. (Since the study was undertaken, Scotland's Colleges has rebranded with two separate parts, *Colleges Scotland* and *College Development Network*.) This meant that the capacity of the individual colleges to participate in the study appeared to be severely circumscribed.

Throughout the summer and autumn of 2012 a number of colleges were either in the midst of merging or in negotiations regarding merger; furthermore, changing UK Border Agency (UKBA) regulations had impacted on several colleges; with a number having had their Highly Trust Sponsor (HTS) licenses – which determines whether or not they can admit students from outside the EU to study - suspended or revoked, placing the viability of their future international student business plans in doubt. These difficulties were reflected in the final level of survey responses, with only 17 colleges out of 41 returning any data, in whole or in part, despite several extensions to the deadline and reminders being made. While this is just under a 40% response rate - which in other circumstances could be perceived as fairly good - we had hoped for more than this given that there were also limitations on the available extant data about the sector's international activity.

5.2 Reflections on issues raised in the study

Our study has revealed the international activity of Scotland's Colleges to be an important part of the college sector portfolio, with over 8% of sector revenue coming from international sources. The international revenue also has an economic impact beyond the colleges with nearly 1000 jobs in Scotland dependent on the college sector's international income. The overall college impact is of macroeconomic proportions, contributing to export earnings, the balance of trade and other recognised macroeconomic variables. Scotland's tertiary education sector is an important export industry for Scotland – and our study shows that the colleges are contributing alongside the universities to Scotland's international standing as an education provider.

There are other social and cultural benefits to the international portfolio. Domestic students benefit from the opportunity to mix with students from other parts of the world and college international partnerships provide opportunities for domestic students to undertake study or work placements abroad as well as supporting staff continuing professional development.

The importance of educating domestic students to be 'global citizens' and encouraging a broader perspective is an important element of current government policy – evidenced, for instance through government support for initiatives such as the NUS 'Global citizenship' project which is promoting student outward mobility.[29]

It is of some concern therefore that our study also found that that many colleges are currently struggling to support their international portfolio. This seems to be largely due to the wider political and policy environment, with college international programmes being accidental casualties in a 'perfect storm' of sectoral organisational change and increasingly stringent UK border control regulations. Only one college from all those who responded indicated that they felt sufficiently prepared to accommodate the UK Borders Agency requirements; and that college was investing considerable resources in their recruitment and support processes to ensure compliance.

UK Borders' Agency regulations regarding recruitment of non-EU students. are stricter for colleges than for universities and make engagement in overseas student recruitment difficult, particularly for smaller colleges, to manage. The regulations can have a disproportionately damaging effect on small specialist colleges, who can run the risk of losing Highly Trusted Sponsor (HTS) status – with adverse effects for the college, its reputation and its existing international students - if a single applicant has their visa application refused or fails to complete their course (for whatever reason.)

In some of the larger colleges the infrastructure and whole programmes to support and develop international activity, particularly student recruitment have now been lost as a direct consequence of losing their HTS license. The challenges brought about by changes to the UKBA policies have clearly had a dramatic impact on the capacity and willingness of some colleges to invest in international activity, particularly at a time of severe economic downturn and extensive sectoral reform.

This leads to another very important issue which is highlighted in the report , which is the lack of reliable or consistent data on college international student numbers. .

Quite large discrepancies exist between the numbers reported by some of the

colleges and the numbers being held in the 'official' SFC *Infact* database. The absence of consistent data on international student numbers has a number of serious ramifications.

Firstly, the economic importance to Scotland of college international activity will be underestimated, with the consequent risk that a successful export industry is inadvertently damaged through lack of policy or political support. Secondly, and possibly of greater importance, is the negative impact on both policy and public perceptions of the colleges and the significance, impact and reach of their work.

Current policy discussion about Scotland's Colleges relies on data from the SFC *Infact* database, as this is the only currently available Scotland-wide source for college student numbers. *Infact* statistics indicate that 99% of those studying in the colleges are from Scotland. This inevitably makes the international dimension to college work appear tangential in debates about the colleges' future activities and role. It makes it difficult to present a case for supporting college international business if the scale of that business appears to be relatively insignificant. Indeed helping the college sector to manage problems arising from changing UK Borders Agency regulations would quite naturally have low policy priority if the overall level of international recruitment is thought to be low.

However our findings in this study suggest that there could in reality be a much higher proportion of college students coming from outside Scotland who are not being captured within the *Infact* figures. We have also seen through the case studies undertaken that levels of international engagement are much higher than many may have imagined. Given that around 8% of College income is from international sources it also seems unlikely that the proportion of international students could be as low as *less than 1%*. This is a data issue which needs to be resolved. (It may also be affecting the reporting of students from the rest of the UK as well as from the rest of the EU and beyond.) We would recommend that the issue is examined by the SFC's Statistical Advisory Group for Further Education (SAGE) as part of their ongoing work to improve the evidence base about college education in Scotland

Overall our study has highlighted the range and extent of international activity in the colleges. College international business has a positive economic impact on the surrounding community and on Scotland. The colleges generate jobs, output, and export earnings, contributing to GDP and to the balance of trade. Within the resources available for the study we also began to explore the perceived importance and wider social benefit of college international programmes and partnerships. These

appear particularly important in terms of supporting the international reputation of Scotland for education and training as well as providing domestic students with wider opportunities and perspectives required to participate in a more internationally mobile world.

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Appendix One: College Regionalisation: The Regions

Aberdeen & Aberdeenshire	Aberdeen, Banff & Buchan
Fife	Adam Smith, Carnegie, Non-Land based Provision from Elmwood
Tayside	Dundee and Angus
Glasgow	Annie'sland, North Glasgow, Stow, John Wheatley, Cardonald, Langside, City of Glasgow
West	Reid Kerr, Clydebank. James Watt Inverclyde Campus
Ayrshire	Ayr, Kilmarnock. James Watt Kilwinning Campus
Dumfries and Galloway	Dumfries and Galloway
Lanarkshire	Coatbridge, Cumbernauld, Motherwell, South Lanarkshire
Borders	Borders
Edinburgh & Lothians	Jewel and Esk, Stevenson, Telford
Central	Forth Valley
Highlands and Islands	Perth, Lewis Castle, Orkney, Shetland, Inverness, Moray, North Highland, Argyll, West Highland
Land-based provision (from Elmwood, Barony and Oatridge) will be merged with the Scottish agricultural College form part of the new <i>Scottish Rural University College</i>	
Newbattle Abbey and Sabhal Mór Ostaig will sit outside of the regional groupings	
<i>Source:</i> Letter from the Cabinet Secretary for Education and Lifelong Learning dated 1 February 2012 to the Chair of the Scottish Funding Council. Available from the SFC website.	

Appendix 2: Annotated Questionnaire 2: Level and nature of colleges' international activity

Q1. College Id:

Q2. Does/ has your college engage(d) in any of the following international activities? (N=15)

*Please tick all that apply **and** indicate which international areas apply to this activity*

Activity	We do this now	We have done this in last 5 years	European Union	Other international
Teaching students from outside the UK at this College	73%	67%	67%	53%
Delivering learning programmes abroad including via partnership arrangements with colleges/ universities/ private organisations in other countries	27	40%	40%	33%
Delivering learning / training programmes via commercial contracts / commissions	47%	33%	27%	40%
Delivering other activities via commercial contracts / commissions (e.g. consultancy)	27%	33%	40%	26%
Staff and / or student exchanges and visits	60%	67%	67%	67%
Global partnerships (non-direct profit making)*	20%	27%	27%	27%
Activities aimed at "internationalising" the college; e.g. curriculum development, special projects	73%	67%	60%	47%
Other international activities you deliver via commercial contracts / commissions. (Please provide details below):	7%	27%	-	7%
None of the above – college has no current or international activity in the past 5 years. Please now go to Q 14	-	-	-	-

*Global partnerships are defined here as largely non-profit-making activities such as capacity building and contribution to education systems and reform within developing countries, exchange of experience and good practice with overseas colleges.

Q.3 Please indicate whether any of these activities are funded from any of the following sources (N=15)

	Int' student fees	Other commercial sources (full cost recovery)	Scottish Govt funding	UK Govt or national agency grants	British Council	Int' Govt or int' agency grants	EU prog's inc. <i>Interr eg</i>	College's own funds	Other	DK
Teaching students from outside the UK at this college	67%	40%	27%	-	7%	7%	40%	20%	7%	-
Delivering learning programmes abroad	13%	13%	7%	-	13%	7%	33%	27%	7%	7%
Delivering learning / training programmes via commercial contracts / Commissions	7%	53%	-	-	-	-	-	7%	-	7%
Delivering other activities via commercial contracts / commissions (e.g. consultancy)	7%	20%	-	-	-	-	20%	-	-	7%
Staff and / or student exchanges and visits	13%	7%	7%	20%	47%	13%	60%	60%	20%	7%
Global partnerships (non direct profit making) *	-	-	-	13%	20%	7%	7%	20%	7%	-
Activities aimed at 'internationalising' the college	13%	13%	-	20%	27%	7%	40%	73%	-	-
Other (Please provide details below):	7%	7%	-	-	-	-	-	-	13%	-

*Global partnerships are defined here as largely non-profit-making activities such as capacity building and contribution to education systems and

reform within developing countries, exchange of experience and good practice with overseas colleges.

Q4. What do you consider to be the main strengths of this college in the international market? (N=15)

Please tick all that apply

Subject areas:	
Engineering	60%
Arts, humanities, social science	20%
Construction	20%
Business administration	73%
Other manufacturing	13%
English language training (general)	53%
Health	47%
English language (for specific purposes)	27%
Design / Technology	13%
Teacher / Teacher training	27%
Fashion	21%
Management training	21%
Computing / IT	60%
Entrepreneurship	13%
Creative and performing arts	33%
Other subject areas (please specify below)	47%
Hospitality (2) Golf/ Green Keeping (n=1) Care/social care (n=1) Dental Technology (n=1) Water and waste water/ Journalism/Graphic Design/ Television Operations/ Health and Safety/ Life Sciences (n=1)	

Q5. Does the college work in collaboration with any of the following on the development and delivery of international activities (i.e. other than just receiving funds)? (N=15)

Please select all that apply

Other Scottish FE colleges	67%
Other UK FE colleges	13%
Scottish universities	40%
Other UK universities	20%
British Council	47%
Sector Skills Councils or other industry bodies	13%
Project partners in EU countries	60%
SCDI	33%
SDI	40%
Scottish Enterprise	7%
Other Scottish Government departments	-
International government agencies	13%
Students Associations Eg. NUS or UKCISA (please specify)	33% (4 UKCISA and 1 NUS)
UK Employers or Employers' Associations	13%
International Employers or Employers' Associations	13%
SQA	27%
Other (Please specify below)	13%
AoC TVETUK, IESTA (International Energy Skills and Training Alliance)	

Q6. Do you have a formal arrangement with any specific higher education institutions in the UK or overseas to enable students to progress to HE? (N=15)

Yes	60%
No	40%

Q7. Do you have any of the following? (N=15)

Please tick all that apply

A team or specific staff member in the college dedicated to promoting international activity	80%
A financial team or specific staff member in the college dedicated to supporting international activity	67%
A formal strategy for international activity	67%
A network of organisations that support international activity	60%
Any other capacity or facilities that assist you in developing international activity? Please specify below: In-country contacts and agents Agents and Partner networks We have an office base in China - part of a partnership with a golf management company	20%

Q8. Looking across the past five years, what examples of your College's international activity would you like to highlight as good practice or as being particularly important to you?

(Please see Section 3 for summary of key themes from this question)

Q9. In the past five years, has your college used the services of any of the following in relation international activities? (N=15)

Please tick all that apply

Service provider	
British Council in the UK	67%
British Council's offices overseas	60%
Foreign Office	40%
Association of Colleges	13%
Scotland's Colleges	73%
Scottish Development International (SDI)	73%
Scottish Council for Development and Industry (SCDI)	53%
Business Gateway (Scottish Enterprise)	7%
Scottish Government	33%
Scottish Qualifications Authority (SQA)	33%
UK Trade and Industry (UKTI)	40%
Other colleges	60%
Other. (Please specify below) 1= TVETUK 1= IESTA	13%

3. Future plans

Q10. Thinking about the next five years, what will be the fastest growing areas of this college's international activities? (N=15)

Please tick all that apply

Activity	
Teaching students from outside the UK at this College	67%
Delivering learning programmes abroad including via partnership arrangements with colleges/ universities/ private organisations in other countries	53%
Delivering learning / training programmes via commercial contracts / commissions	67%
Delivering other activities via commercial contracts / commissions (e.g. consultancy)	27%
Staff and / or student exchanges and visits	60%
Global partnerships (non-direct profit making)*	27%
Activities aimed at "internationalising" the college; e.g. curriculum development, special projects	60%
Other international activities you deliver via commercial contracts / commissions. (Please provide details below): 1= Setting up overseas delivery/online delivery. Validation and certification of courses overseas. Developing partnership in China to deliver golf education in china	7%
None of the above – the college has no plans for future international activity	7%

Q11. Please state whether you strongly agree, agree, disagree, or strongly disagree with the following statements (N=15)

Please tick all that apply

	Strongly agree	Agree	Disagree	Strongly disagree
Over the next five years this college will be increasingly dependent upon income from international activities	28%	42%	14%	14%
This college cannot afford to make the investments necessary to attract international business	7%	28%	50%	14%
The international activities of this college benefit its staff and students	64%	36%	-	-
This college does not have the capacity to expand its international activities	14%	14%	36%	36%
This college is well prepared to further develop its international activities	36%	36%	21%	7%
Changes to UK Border Agency regulations will limit the capacity of the College to recruit international students (N=12)	69%	15%	15%	-

Q12. What kind of support, if any, would the college consider necessary in order to develop its international activities further? (N=15)

Please tick all that apply

Type of support required	
In-country specialists	53%
Support in marketing international commercial activity	67%
Funding from Scottish and/or UK Government	67%
Advice on finance regarding conducting international activity	47%
More in-college personnel with appropriate experience to develop and manage international activities	60%
More resources generally to develop international activities	47%
Other: (please specify below 4 responses	27%

Q13. Would you be willing for your college to be included in the research as a case study to illuminate how international activity contributes to the wider Scottish economy, society and community? (N=15)

Yes	33%
No	67%

Please now go to the final question Q18

ONLY FOR COLLEGES WITH NO CURRENT INTERNATIONAL ACTIVITY

NOTE: NOT APPLICABLE TO THE RESPONDING COLLEGES

The following questions (Q14 - Q17) are for colleges with no international activity currently or in the past five years.

Q14. Is it an established policy of this college not to engage in international activities?

Yes	-
No, it just turned out that way	-

Q15. At anytime in the past has this college been engaged in any of the following international activities?

Please select all that apply

Teaching students from outside the UK at this College	-
Delivering learning programmes abroad including via partnership arrangements with colleges/ universities/ private organisations in other countries	-
Delivering learning / training programmes via commercial contracts / commissions	-
Delivering other activities via commercial contracts / commissions (e.g. consultancy)	-
Staff and / or student exchanges and visits	-
Global partnerships (non-direct profit making)	-
Activities aimed at "internationalising" the college; e.g. curriculum development, special projects	-
Other international activities you deliver via commercial contracts / commissions. (Please provide details below):	-

Q16. What were the reasons for not continuing with these international activities?

-

Q17. How likely is it that this college will engage in international activities of some kind in the future?

Very likely	-
Likely	-
Not very likely	-
Very unlikely	-

FOR ALL COLLEGES:

Q18. What do you consider to be challenges or barriers for this college regarding conducting international activities? (N=15)

Please tick all that apply

Lack of interest to engage in international activities	7%
Lack of knowledge about international markets	40%
Lack of support from other agencies to facilitate entry into international markets	33%
Lack of resources to develop international activities	47%
Lack of staff with appropriate experience to develop and manage these activities	33%
No spare capacity for student recruitment – college has sufficient demand from UK students	40%
Diverts the college from core mission	-
Other. (Please specify below the other factors you consider to be barriers to entering the international market) 4 responses:	33%

APPENDIX Three:

Data Questionnaire (Master Version). Each College received an individually customised version of this questionnaire, prepopulated with the publicly available data about the College.

Academic & Financial Year 2010/11

Student Data Required

Student Numbers Further Education (FE)	
Scottish Region Domiciled	
Rest of UK domiciled (England, Wales, Northern Ireland)	
NON-UK Rest of EU domiciled	
NON-UK/EU domiciled (Europe)	
NON-UK/EU domiciled (Overseas)	
FE Students	0
Student Numbers Higher Education (HE)	
Scottish Region Domiciled	
Rest of UK domiciled (England, Wales, Northern Ireland)	
NON-UK Rest of EU domiciled	
NON-UK/EU domiciled (Europe)	
NON-UK/EU domiciled (Overseas)	
HE Students	0
Total Student Numbers	0

Academic & Financial Year 2010/11

EXPENDITURE TYPE	£000s
Staff Costs	
Other operating expenses	
Depreciation	
Interest payable	
TOTAL EXPENDITURE	0

Academic & Financial Year 2010/11

We are asking for broad geographical sources of income to enable analysis of the monies the college sector attracts into Scotland from the rest of UK and overseas.

"Totals" data below has been collated from the data available on the SFC website - colleges 2010-11 consolidated spreadsheets

http://www.sfc.ac.uk/effective_institutions/InstitutionalGovernance/Colleges/College_financial_statements_2010_11.aspx

Please provide best estimates if exact figures are unavailable.

INCOME TYPE	GEOGRAPHICAL SOURCE OF FUNDING						TOTALS
	Scotland Public Sector	Rest of UK Public Sector	Scotland Private Sector	Rest of UK Private Sector	EU	Non-EU	£000s
Funding Council Grants							
Tuition Fees, Education Grants & Contracts							
Research Grants and Contracts							
Other Income*							
Endowment and investment income							
TOTAL	0	0	0	0	0	0	0
* Eg From consultancy/other contracts/facilities hire/catering or any other type of income							

Academic & Financial Year 2010/11

For research purposes:

International student visitors do not hold visas under UKBA Tier 4 rules.

This is important information relating to College activity that is not available from published sources.

If information is not known exactly, please give your best estimate

Student Visitors Home Domicile	LENGTH OF STAY				Total by home domicile
	1 Week or less	More than 1 Week Less than 1 month	2-3 months	4 - 6 Months	
Scotland					0
Rest of UK					0
EU					0
Non EU					0
Total by Length of Stay	0	0	0	0	0

Academic & Financial Year 2010/11

Analysis of the pattern of Business and Leisure Visitors to Colleges can be an additional illustration of the ways in which colleges attract investment into a region. We can analyse this additional impact.

- a) those who stayed in college accommodation where available
- b) those who visited the college for business but may have stayed in external hotel accommodation

If POSSIBLE, please identify the geographical origin of these visitors.

Visitor Type	Number of Visitor Bed Nights		Bed nights by Visitor type
	College Accommodation	Other Accommodation e.g. Local Hotel	
Scottish Business Visitor			
Scottish Leisure Visitor			
Rest of UK Business Visitor			
Rest of UK Leisure Visitor			
International* Business Visitor			
International* Leisure Visitor			
Unknown Visitor Type			
Total number of Bed Nights	0	0	

*International includes everyone from outside the UK (EU and non-EU)