QAA

SUB-BACHELOR HIGHER EDUCATION IN THE UNITED KINGDOM

Gareth Parry, Arti Saraswat and Anne Thompson

This report was prepared for the Quality Assurance Agency for Higher Education (QAA) by the Centre for the Study of Higher Education at the University of Sheffield.

The authors are Professor Gareth Parry, Dr Arti Saraswat and Dr Anne Thompson.

The views expressed in the report are those of the project team and do not necessarily reflect those of the Quality Assurance Agency for Higher Education.

Acknowledgements

Our thanks go to many individuals and organisations for assisting with this study. In addition to officials in government departments in England, Scotland, Wales and Northern Ireland, we gratefully acknowledge the help of Adrian Anderson, Richard Boniface, Lucy Hunter Blackburn, Jim Gallacher, Julian Gravatt, Rob Stroud and Graham Whalley.

Dedication

Our report is dedicated to the memory of Dr Peter Wright (1941-2016). Before retiring from full-time work in 2004, Peter was a Deputy Director at QAA, where he co-authored a report (with Julian Ellis) for the Department for Education and Employment which addressed questions similar to those in our own study. We are in his debt for this investigation as well as for his many other contributions - academic, professional and intellectual - to the field of higher education.

Contents

Acknowledgements 2
Dedication 2
Contents 3
List of tables 6
Executive summary 1
Matters of definition 1
Volumes and proportions of students 3
Features of development 3
Interventions by government 5
Zones of heterogeneity and complexity 6
Patterns of provision and participation 7
Reviews of fitness and funding 8
Issues for debate and investigation 9
1 Introduction 11
2 What is sub-bachelor higher education? 14
2.1 Two categories of sub-bachelor higher education 14
2.1.1 Higher education at the other undergraduate levels 14
2.1.2 Higher level education, training and skills 15
2.1.3 Sub-bachelor qualifications, higher level apprenticeships and qualifications frameworks 15
2.2 Sub-bachelor higher education in early UK qualifications frameworks 16
2.3 Sub-bachelor qualifications in the FHEQ 19
2.3.1 FHEQ qualification descriptor at Level 4 19
2.3.2 FHEQ qualification descriptor at Level 5 20
2.4 Sub-bachelor qualifications in the FQHEIS 21
2.4.1 FQHEIS qualification descriptor at SCQF Level 7 21
2.4.2 FQHEIS qualification descriptor at SCQF Level 8 22
2.5 Sub-bachelor qualifications in international frameworks and classifications 22
3 What size and share of higher education? 24
3.1 Students studying in the UK and offshore for qualifications and credits at the sub-bachelor levels 25
3.2 Full-time and part-time students studying at the sub-bachelor levels in higher education institutions and further education colleges in the UK 27
3.3 Full-time and part-time students studying at the sub-bachelor levels in higher education institutions and further education colleges in England, Scotland, Wales and Northern Ireland 28
3.4 Full-time and part-time students registered at the sub-bachelor levels at higher education institutions and further education colleges in the UK 30

3.5 Full-time and part-time students registered at the sub-bachelor levels at higher education institutions and further education colleges in England, Scotland, Wales and Northern Ireland 31
3.6 Sub-bachelor higher education and the Open University 33
3.7 Full-time and part-time students studying for designated undergraduate courses at the sub-bachelor levels at private providers in England 33
3.8 Individuals undertaking higher level apprenticeships in England, Scotland, Wales and Northern Ireland 34
3.9 Offshore students studying for sub-bachelor qualifications awarded by UK higher education providers or awarding organisations in England, Scotland, Wales and Northern Ireland 35
4 How has it developed? 37
4.1 Sub-bachelor higher education at the time of the Robbins inquiry 38
4.2 A binary policy for higher education 40
4.3 Reform of teacher education and the birth of the Diploma in Higher Education 42
4.4 A new national machinery for technician education at all levels 44
4.5 Sub-bachelor qualifications and the shift to mass higher education 46
4.6 Dearing on higher education at the sub-bachelor levels 48
4.7 Weak demand and the invention of the Foundation Degree 50
4.8 Declining shares of sub-bachelor higher education 53
4.9 Austerity, market reforms and higher level apprenticeships 57
5 What qualification types, what country profiles? 63
5.1 Main types of sub-bachelor qualification in the UK 63
5.2 Sector locations of sub-bachelor higher education in the UK countries 67
5.3 Main types and locations sub-bachelor qualifications in England 68
5.4 Main types and locations of sub-bachelor qualifications in Scotland 71
5.5 Main types and locations of sub-bachelor qualifications in Wales 73
5.6 Main types and locations of sub-bachelor qualifications in Northern Ireland 75
5.7 Characteristics of the sub-bachelor student population in the UK and England 77
6 Futures? 82
6.1 Proposals for regulatory reform in English higher education 83
6.1.1 A single regulator for higher education 83
6.1.2 A register of higher education providers 84
6.1.3 Reformed awarding powers and validation arrangements 85
6.1.4 Plans for technical education and qualifications at the higher skills levels in England 86
6.1.5 A single body to oversee the whole of technical education 87
6.1.6 Area reviews of post-16 education and training institutions 87
6.1.7 A network of specialist national colleges 88
6.1.8 A set of new Institutes of Technology 89
6.2 Reviews of higher and post-compulsory education in Wales 89

6.2.1 Diamond review of higher education funding and student finance 89
6.2.2 Hazelkorn review of the oversight of post-compulsory education..... 90
6.3 A strategy for higher apprenticeships in Northern Ireland 91
6.4 A commission on widening access in Scotland..... 91
6.5 Issues for debate and investigation 92
6.5.1 Explaining the ups and downs of sub-bachelor qualifications 93
6.5.2 Increasing the sub-bachelor share of higher education..... 93
6.5.3 Moving between the tracks, levels and hierarchies of tertiary education..... 94
6.5.4 Aligning sector policies and programmes 95
6.5.5 Understanding existing and emerging forms of sub-bachelor education..... 96
A note on statistical information 97
Sub-bachelor higher education in publicly funded higher education institutions and further education colleges 97
Sub-bachelor higher education in the Open University..... 98
Sub-bachelor higher education in higher level apprenticeships 98
Sub-bachelor higher education among private providers..... 98
Sub-bachelor higher education studied wholly offshore..... 99
Combining administrative data on sub-bachelor higher education..... 99
References 100

List of tables

Table 2.1: Examples of the typical higher education qualifications at levels of the frameworks for higher education qualifications in the UK and their corresponding cycle in the QF-EHEA.

Table 3.1: Students studying for an award of a UK higher education provider or a UK awarding organisation by level of study and type of provision, United Kingdom, 2014-15.

Table 3.2: Students studying for an award of a UK higher education provider or a UK awarding organisation by level of study, type of provision and country, United Kingdom, 2014-15.

Table 3.3: Students studying for higher education and higher level qualifications in higher education institutions (including the Open University) and further education colleges by level of study and mode of study, United Kingdom, 2014-15.

Table 3.4: Students studying for higher education and higher level qualifications in higher education institutions and further education colleges by level of study, mode of study and country, United Kingdom, 2014-15.

Table 3.5: Students studying for higher education and higher level qualifications in higher education institutions (including the Open University) and further education colleges (excluding franchise students) by level of study and mode of study, United Kingdom, 2014-15.

Table 3.6: Students studying for higher education and higher level qualifications in higher education institutions and further education colleges (excluding franchise students) by level of study, mode of study and country, United Kingdom, 2014-15.

Table 3.7: Students on designated courses of undergraduate education at private providers by level of study and mode of study, England, 2014-15.

Table 3.8: Individuals undertaking higher level apprenticeships by level of study and country, United Kingdom, 2014-15.

Table 3.9: Students studying wholly overseas for UK higher education qualifications by level of study and country, United Kingdom, 2014-15.

Table 4.1: Students in higher education by level of study and type of institution, Great Britain, 1962-63.

Table 4.2: Students on courses of higher education (excluding the Open University) by level of study, mode of study and country, 1988 and 1992, United Kingdom.

Table 4.3: Students on courses of higher education at higher education institutions and further education colleges by level and type of qualification, England, 2000-01 and 2009-10.

Table 4.4: Students on courses of higher education at higher education institutions and further education colleges by level and type of qualification, Scotland, 2000-01 and 2009-10.

Table 4.5: Students on courses of higher education (including the Open University) by level of study, mode of study and country, 1996-97 and 2014-15, United Kingdom.

Table 5.1: Higher education students on sub-bachelor courses taught at higher education institutions (including the Open University) and further education colleges by type of qualification, United Kingdom, 2014-15.

Table 5.2 Higher education students on sub-bachelor courses leading to undergraduate and higher level qualifications at higher education institutions (including the Open University) and further education colleges by type of qualification and mode of study, United Kingdom, 2014-15.

Table 5.3: Higher education students on sub-bachelor courses taught at higher education institutions (including the Open University) and further education colleges by country, United Kingdom, 2014-15.

Table 5.4: Higher education students on sub-bachelor courses taught at higher education institutions (including the Open University) and further education colleges by type of qualification, England, 2014-15.

Table 5.5: Higher education students registered on sub-bachelor courses at higher education institutions (including the Open University) and further education colleges by type of qualification and mode of study, England, 2014-15.

Table 5.6: Higher education students on sub-bachelor courses taught at higher education institutions (including the Open University) and further education colleges by type of qualification and location of study, Scotland, 2014-15.

Table 5.7: Higher education students registered on sub-bachelor courses at higher education institutions (including the Open University) and further education colleges by type of qualification and mode of study, Scotland, 2014-15.

Table 5.8: Higher education students on sub-bachelor courses taught at higher education institutions (including the Open University) and further education colleges by type of qualification and location of study, Wales, 2014-15.

Table 5.9: Higher education students registered on sub-bachelor courses at higher education institutions (including the Open University) and further education colleges by type of qualification and mode of study, Wales, 2014-15.

Table 5.10: Higher education students on sub-bachelor courses taught at higher education institutions (including the Open University) and further education colleges by type of qualification and location of study, Northern Ireland, 2014-15.

Table 5.11: Higher education students registered on sub-bachelor courses at higher education institutions (including the Open University) and further education colleges by type of qualification and mode of study, Northern Ireland, 2014-15.

Table 5.12: Percentage of bachelor and sub-bachelor students studying at higher education institutions by domicile, gender, age, ethnicity and mode of study, United Kingdom, 2014-15.

Table 5.13: Percentage of bachelor and sub-bachelor students studying at higher education institutions by subject area and mode of study, United Kingdom, 2014-15.

Executive summary

This summary presents the main findings from a scoping study to understand the contemporary scale, shape and history of sub-bachelor higher education in the UK. It was undertaken for the Quality Assurance Agency for Higher Education in 2016-17 and carried out by a team at the University of Sheffield led by Professor Gareth Parry and including Dr Arti Saraswat and Dr Anne Thompson.

The bulk of the study is based on an analysis of administrative data on sub-bachelor programmes and students in higher education establishments and further education institutions. The base year for this data is 2014-15, the most recent available at the time of the research. The coverage is for the UK as a whole and, separately, for England, Scotland, Wales and Northern Ireland. Statistical information on sub-bachelor qualifications in higher education establishments is collected on a UK-wide basis. That on the sub-bachelor courses provided by further education institutions is collected and reported by separate agencies in the four countries of the UK. That on provision in the private sector is only partially enumerated, with no coverage of the majority of providers and students.

Drawing on selected academic and policy literatures, a commentary is made on patterns and trends in participation and provision at the sub-bachelor levels. The major national policies bearing on the past and present situation of sub-bachelor courses, qualifications and students are reviewed. Similarities and differences in the forms, shapes and directions taken by sub-bachelor higher education in the four jurisdictions are highlighted. In a final section, the future of this zone of higher education is considered in light of reform proposals for the whole of tertiary education, including the expansion of higher level apprenticeships.

Matters of definition

- **There is no standard definition or consistent terminology to describe higher education at levels below the bachelor degree**. Early categorisations included non-degree and sub-degree. After 2000, the title of degree was extended to a new qualification - the Foundation Degree - which was awarded at a level below the bachelor degree. Thereafter, the term sub-bachelor has been a more accurate description, although one still referenced to another (superordinate) type of qualification. An inclusive definition of sub-bachelor higher education is used in this report. Occupying this space are undergraduate qualifications, higher level awards, and credits or units awarded at the sub-bachelor levels by UK higher education institutions and other awarding authorities. These might be offered by public or private providers, and taught in the UK or offshore or online. Most take the form of free-standing courses but some are embedded in work-based schemes, such as apprenticeships.

- **Sub-bachelor higher education has for long been a collection of diverse and disparate qualifications**. Some of the oldest, such as the Higher National Diploma (HND) and Higher National Certificate (HNC), date from the 1920s. Outside Scotland, ownership of these two qualifications has changed several times. The youngest is the Foundation Degree, a work-focused qualification able to be awarded by institutions holding taught or Foundation Degree awarding powers. The Diploma of Higher Education was launched in the 1970s as a general undergraduate qualification but later, along with the Certificate of Higher Education, evolved into a qualification serving mainly the health professions. Courses and examinations leading to professional qualifications have been a staple of sub-bachelor higher education and they remain so.

- **Two sets of national qualifications frameworks indicate the relative positioning of sub-bachelor qualifications**. Prior to the establishment of such frameworks, sub-bachelor qualifications were rarely brought into relationship with each other. Nor were they easily or formally aligned with levels. Today, all such qualifications find a place on one or both of the two national frameworks operated in each of the four UK countries. One is the Framework for Higher Education Qualifications in England, Wales and Northern Ireland (FHEQ) and the Framework for Qualifications of Higher Education Institutions in Scotland (FQHEIS). The second and parallel national qualifications framework spans all levels of education and training, with each country adopting and applying its own version of the framework. Across the whole of the UK, sub-bachelor qualifications are at two levels on all frameworks: at Levels 4 and 5 and, in Scotland, at Levels 7 and 8. The two levels are sometimes named the certificate and diploma levels.

- **Sub-bachelor awards on the qualifications frameworks for higher education are regarded as undergraduate qualifications**. They are termed qualifications at the other undergraduate levels. The main qualification types here are the Foundation Degree, HND, HNC, Diploma of Higher Education and Certificate of Higher Education. In Scotland, where the HND and HNC are less seen as undergraduate qualifications, they sit on one of the two frameworks. Elsewhere, the HND and HNC are placed on both frameworks. If they are awarded by degree-awarding bodies under licence from Pearson (an awarding organisation, not an awarding body) they are included in the FHEQ. If awarded directly by Pearson, they sit on the frameworks for all education and training operating in England, Wales and Northern Ireland.

- **Sub-bachelor qualifications on the frameworks spanning all levels of education and training are styled higher level qualifications**. Typically, the main kinds of awards are professional, occupational and technical qualifications awarded by associated bodies. These courses and qualifications are variously termed higher level education, higher level training or higher level skills. This is commonly shortened, as here, to higher level qualifications.

- **Undergraduate qualifications at the sub-bachelor levels are recognised for public funding**. Outside Scotland, the eligibility for public funding derives from their designation as prescribed courses of higher education. Originally, courses on the prescribed list were those able to be supported by the funding bodies for higher education. The same designation was then used in England to recognise courses fundable through fee loans carried by students.

- **Higher level qualifications are frequently styled non-prescribed courses**. This is because they did not qualify for support from the funding bodies for higher education. However, the funding bodies for further education have the power to support higher level provision, if they so wish. Such discretion has been exercised to a very limited extent.

- **Higher level apprenticeships are supported through a different funding model than for sub-degree qualifications taught outside apprenticeship schemes**. They are administered and counted separately from the rest of higher and further education. The ambiguities and confusions surrounding higher level apprenticeships are even greater than those bearing on sub-bachelor qualifications. In England, two of the four types of apprenticeship are aligned to the levels of higher education. Higher apprenticeships are available at levels up to and including the master's degree. Degree apprenticeships, on the other hand, are referenced

specifically to the bachelor's or master's degree. In Wales, higher apprenticeships are the only type at the higher education levels. The same is the case in Northern Ireland where higher level apprenticeships are targeted at qualifications between the HNC and the degree of Doctor of Philosophy. Scotland is different again. Its graduate level apprenticeships extend from the HND through to the master's degree. In this report, those apprenticeships which encompass the sub-bachelor levels are described as higher level apprenticeships.

Volumes and proportions of students

- **Close to one in seven higher education students are studying at the sub-bachelor levels in the public sectors of higher and further education in the UK**. In 2014-15, around 366,000 students (15 per cent of the total) were pursuing sub-bachelor courses in universities and colleges. In addition, around 16,000 students were studying offshore for sub-bachelor qualifications awarded by a recognised UK awarding authority. Another 40,000 or more students were engaged in higher level apprenticeships. Compared to the numbers studying at the bachelor and postgraduate levels, sub-bachelor higher education was the smallest segment of the UK system. Some sub-bachelor programmes were undertaken in the private sector of higher education, although the full numbers are not known.

- **More students are enrolled on sub-bachelor programmes leading to undergraduate awards than courses leading to higher level qualifications**. More than two-thirds (70 per cent) were studying for undergraduate awards. However, this proportion is reduced considerably if those pursuing undergraduate credits (one-fifth of the total sub-bachelor population) are excluded. By contrast, those studying for higher level units were a tiny percentage.

- **Most sub-bachelor students are studying on a part-time basis**. Whereas the majority of students on bachelor and postgraduate programmes were classified as full-time, seven out of 10 on sub-bachelor courses were part-time students. However, this is to acknowledge that distinctions between full-time and part-time have become increasingly blurred and less meaningful, especially where work-based learning is a significant component of the curriculum. Accordingly, the mode of study on higher level apprenticeships is left undefined in official statistics.

- **Part-time students enrolled in sub-bachelor higher education are the largest portion of the part-time population**. Unlike in previous decades, the part-time proportion at the sub-bachelor levels is no longer a majority. The present-day number and percentage of part-time sub-bachelor students is 258,000 or 37 per cent, followed by 235,000 or 34 per cent engaged in postgraduate studies and another 198,000 or 29 per cent enrolled in bachelor education.

- **There is considerable variation between UK countries in the size and share of sub-bachelor higher education**. England has the lowest proportion of sub-bachelor students, at 13 per cent of its higher education population. By contrast, Northern Ireland (26 per cent) has more than double this proportion, closely followed by Scotland with one-quarter of its higher education students enrolled on sub-bachelor programmes. The share in Wales is 18 per cent.

Features of development

- **Over the last 50 years, sub-bachelor provision has been overtaken and eclipsed by the growth of bachelor and postgraduate education**. When the

Robbins Committee began its inquiry into British higher education in the early 1960s, those on non-degree courses accounted for more than half of the higher education population. By the late 1980s, the sub-bachelor share had reduced to one-third. Although it shared in the rapid expansion in the years that followed, its growth was slower than at the bachelor and postgraduate levels. By the middle of the 1990s, the proportion had reduced to one-quarter. Despite resumed overall expansion over the last 20 years, demand for sub-bachelor programmes weakened leading to a fall in student numbers. Today, less than one in seven are enrolled at these levels.

- **Historically, higher education at the sub-bachelor levels has largely been a responsibility of non-university institutions**. Before the Robbins inquiry, higher education was commonly equated with that studied full-time for degrees at universities. This was to ignore the advanced courses of further education attended mostly by part-time students at local authority establishments. It was also to disregard the full-time certificate courses provided by teacher training institutions. Most of this non-university provision led to non-degree qualifications. Except for their short courses in adult education, mostly uncertificated, the universities continued to focus exclusively on bachelor and postgraduate degrees.

- **The former local authority establishments have continued to account for the bulk of sub-bachelor enrolments**. When the binary division between university and non-university higher education was abandoned in 1992, the polytechnics and other institutions previously under local government brought around 60 per cent of the sub-bachelor population into the unified higher education sector. The other 40 per cent was carried by colleges in the further education sector. In 2014-15, the same sets of institutions were responsible for 56 per cent and 44 per cent respectively of sub-bachelor enrolments. Over the post-binary period, the actual numbers taught at these levels in each sector were roughly equal. This was due to a fraction of students registered at higher education institutions being taught at further education colleges under franchise arrangements.

- **What were once free-standing sub-bachelor courses have increasingly operated as transfer qualifications**. Since the 1980s, and in some cases earlier, the main undergraduate qualifications have routinely functioned as both staged awards and exit points. As staged awards, they enabled students to continue and complete their studies at the bachelor level, albeit mostly within and among non-university institutions. In the early years, this often meant joining a bachelor degree with limited advanced standing. As exit qualifications, especially those with a general or specific vocational orientation, they continued to prepare students for work or advancement in a range of related occupations, typically at the intermediate levels. For some sub-bachelor qualifications, such as the HNC, the arrival of qualifications frameworks has been an important influence on their redefinition as an exit and transfer award.

- **Undergraduate qualifications at the certificate and diploma levels continue to be accorded a lower status**. Bachelor degrees and sub-bachelor awards represent not just a hierarchy of qualification types and levels. They reflect social and cultural attitudes that value academic over vocational education. For some time, academic higher education was equated with the bachelor degree, residential study and the university. Vocational higher education was identified with non-degree qualifications, part-time study, lower entry requirements and ties to local labour markets. Except in the early days of the Diploma of Higher Education, or the liberal studies taught within some vocational qualifications, or the certificated and

non-certificated courses offered in university adult education, the general subjects of undergraduate education were not normally offered at the sub-bachelor levels. This vocational identity and legacy, together with the lower average economic returns to sub-bachelor undergraduate qualifications, have preserved a reputational disadvantage.

Interventions by government

- **Higher education below the bachelor degree has been the setting for two major new qualifications in the modern era, each with novel designs and large ambitions**. Originally conceived in the context of teacher education, the Diploma of Higher Education was launched in 1972 as a qualification with wider purposes. Where existing two-year qualifications were all in specific vocational areas, the new qualification was intended to be available as general and specialised courses, be transbinary (provided and awarded in the university and non-university sectors), be accepted as a qualification needed for employment and, if developed on a unit basis, earn credit towards other qualifications. Thirty years later, another new short-cycle qualification was set more ambitious goals. The first to be titled a degree, the Foundation Degree was asked to redress the historic skills gap at the intermediate levels, involve employers in its design and operation, enable students to apply their learning to workplace situations and, if wanted, guarantee progression to the final stage of an honours degree. In so doing, it was expected to raise the value of work-focused education, subsume other sub-bachelor qualifications, widen participation and take the bulk of future undergraduate expansion.

- **The steep decline in sub-bachelor higher education has occasioned major efforts by government to change the pattern of student demand**. It was not until a crisis of funding in the 1990s that the benefits of sub-bachelor higher education were rediscovered. Affordability and the needs of a learning society, argued the Dearing committee, required that a major part of future growth take place at the sub-bachelor levels. As in Scotland, further education colleges were expected to become the main providers. With little evidence of improved demand for existing sub-bachelor qualifications, a 50 per cent participation target was set for 2010 and the Foundation Degree invented to take the bulk of the necessary expansion. There followed strategies to build a new vocational ladder spanning secondary, further and higher education, supported by progression partnerships and lifelong learning networks. After 2010, a combination of market-led policies, access to public funding for private providers and the promotion of employer-led apprenticeships were the chosen ways to stimulate demand for higher level technical education and training.

- **Eligibility for institutions to award the Foundation Degree has been extended to further education colleges**. Ahead of current proposals to create a level playing field for new and alternative providers to access degree awarding powers and university titles, the power to award the Foundation Degree was extended to further education colleges following legislation in 2007. At the end of 2016, six further education institutions held these powers.

- **Undergraduate qualifications at the sub-bachelor levels are included in the key information set available to prospective students**. Since 2012, standardised information on full-time and part-time undergraduate courses leading to sub-bachelor qualifications has been published on a dedicated website. Not all these courses have full data because of their small numbers of students. The key information set is not collected for programmes leading to higher level qualifications.

- **Higher apprenticeships are expected to pull demand away from bachelor and sub-bachelor undergraduate education**. Across the UK, all current governments have plans to increase the quality and quantity of apprenticeships, including those at the levels of higher education. In England, where there is a commitment to have three million people starting apprenticeships by 2020, the opportunity to earn a wage and avoid a student loan debt while undertaking a higher level apprenticeship is intended to challenge the traditional model of higher education.

Zones of heterogeneity and complexity

- **No other part of higher education has so many types of qualification**. On the undergraduate side, there are five main types of sub-bachelor qualification. Three of these are at the diploma level and two at the certificate level. The HND and the HNC are paired qualifications. They are the highest levels in a family of national qualifications that extend back into further and secondary education. The Diploma of Higher Education and Certificate of Higher Education are parallel awards at each of the two sub-bachelor levels but not otherwise formally coupled. The Foundation Degree was conceived as a framework qualification which would, over time, incorporate the HND and HNC. On the other side of sub-bachelor higher education is a multitude of qualifications, each with their own specificities, specialisms and niche markets.

- **No other part of public sector higher education has so many providers**. Courses leading to qualifications and credits at the sub-bachelor levels are offered by the majority of universities and by most further education colleges. Their location in colleges is central to the distributed character of UK higher education. In 2014-15, sub-bachelor programmes were taught in over 230 further education colleges in England (including some sixth-form colleges), another 17 colleges in Scotland, 11 in Wales and six in Northern Ireland. Several are regional or group colleges, with dispersed campuses resulting from mergers.

- **Sub-bachelor qualifications are awarded by numerous organisations**. For the Foundation Degree, the Diploma of Higher Education and the Certificate of Higher Education, the awarding authorities are institutions with degree awarding powers. Outside of Scotland, the HND and the HNC are awarded directly or under licence by Pearson. In Scotland, these awards are made by the Scottish Qualifications Authority. Non-undergraduate higher level qualifications are awarded by a host of professional and occupational bodies.

- **Higher education programmes below the bachelor level figure prominently among a section of private providers**. In 2014-15, there were 37,000 undergraduate students in receipt of public funds at 63 private providers in England. The majority (58 per cent) were studying for sub-bachelor qualifications, with the HND accounting for the greater part (93 per cent) of this population. There were estimated to be another 670 or so private providers offering courses of higher education. The numbers studying for higher education and higher level qualifications at these organisations were not known. Following concerns about the quality of sub-bachelor provision at some private providers, full number controls were imposed on courses designated for access to public funds.

- **Students located wholly overseas include some studying for UK sub-bachelor qualifications**. In 2014-15, close to 16,000 students were in this category. Four out of five were registered at a UK higher education institution. The other 3,000

offshore students were studying for a sub-bachelor award from a UK higher education establishment but were not registered at that institution.

- **Sub-bachelor higher education is sometimes a franchised activity**. The teaching by further education colleges of students registered at higher education institutions has involved courses leading to the Foundation Degree, the HND and the HNC. In England, around one in 10 of all sub-bachelor students in 2014-15 were taught on franchised programmes. Only in Wales was sub-bachelor higher education in colleges mainly provided through franchising. In Scotland, by contrast, nearly all the sub-bachelor courses provided by colleges were their own programmes. In Northern Ireland, there was no franchised activity.

Patterns of provision and participation

- **Higher level qualifications are studied largely on a part-time basis whereas some sub-bachelor undergraduate qualifications are mostly pursued on a full-time basis**. In 2014-15, full-time students were a large minority (44 per cent) of the undergraduate sub-bachelor population. In the case of the Foundation Degree and the HND, full-time students were in the majority. In Scotland, where the Foundation Degree was not adopted as a major qualification, the HNC was also undertaken mainly full-time. Unlike elsewhere, full-time students in sub-bachelor higher education in Scotland outnumbered their part-time counterparts.

- **Sub-bachelor students are older than those studying for bachelor degrees**. Close to one-quarter (23 per cent) of first year sub-bachelor students in higher education institutions were aged 30 and over, compared to 11 per cent of bachelor students. In England, half of the higher education population taught in further education colleges, most of whom were sub-bachelor students, were aged 25 and over. These age profiles reflected the scale of part-time provision in sub-bachelor higher education. Most students were already in employment and their courses were, for many, a means to enhance their professional knowledge, skills and experience**.**

- **The largest individual sub-bachelor qualification is the Foundation Degree**. Across the UK, around one in five of the sub-bachelor population was enrolled for this qualification. Around one in 10 studied the HND and another one in 10 studied the HNC. The Certificate of Higher Education (4 per cent) and the Diploma of Higher Education (3 per cent) attracted small numbers.

- **Around one in five students are studying for undergraduate credits at the sub-bachelor levels**. At 20 per cent of the total, this was the largest group of awards in sub-bachelor higher education. Only institutions with taught degree awarding powers were able to award undergraduate credits. Undergraduate credits were not usually available to students taught in further education colleges, even under franchise arrangements with higher education institutions.

- **Higher level qualifications defy easy categorisation**. They represent a variety of qualifications associated with specific professional, technical and occupational fields. The two largest groups were those brought together as other diplomas and certificates, and those able to be clearly identified as professional qualifications. However, these were overlapping categories. Together, they accounted for 22 per cent of the students in sub-bachelor higher education.

- **Slightly less than half of the sub-bachelor student population is taught in further education colleges**. The college share in England was around 45 per cent. It was lowest in Wales, at around 16 per cent. In Scotland and Northern Ireland, on the other hand, more sub-bachelor students were registered and taught in further education colleges than in higher education institutions. College-taught students might exit with a sub-bachelor qualification or continue their studies for a bachelor degree, either at the same institution or at a higher education establishment.

- **Domestic and local students dominate the public sectors of sub-bachelor higher education**. International students were a small proportion of this part of higher education. In higher education institutions, just nine per cent of sub-bachelor students had domiciles outside the UK, compared to 14 per cent of bachelor students. In further education colleges, this was a smaller proportion again. Nearly all international sub-bachelor students were taking undergraduate courses.

- **Most sub-bachelor provision is concerned with professional and business subjects**. Around one in four students registered at higher education institutions were undertaking subjects allied to medicine. Together with other science-related subjects in professional fields, these accounted for nearly one-half of the total. Outside the sciences, the largest subject groups were education (12 per cent) and business and administrative studies (10 per cent). Of those taught in further education colleges, a smaller proportion of sub-bachelor undergraduate students (just under one quarter) were pursuing science-related subjects in England. Creative arts and design (25 per cent), followed by education (23 per cent) and business and administrative studies (15 per cent) were the largest subject groups. The latter two subject areas were dominant among those studying for higher level qualifications.

- **Women outnumber men in sub-bachelor higher education**. Among those obtaining qualifications at these levels, 63 per cent of those registered at higher education institutions were women, a higher proportion than in bachelor education. In subjects allied to medicine as well as education, women commanded large majorities. Across the main types of sub-bachelor qualifications taught in the college sector in England, only in the HNC and the HND were women in a minority.

- **The location of sub-bachelor higher education in further education colleges is a key element in widening participation**. Colleges attracted a higher percentage of new entrants from low participation areas than did higher education institutions. The percentage gap was wider for young entrants than for older entrants. In England, this sometimes included progression from a sub-bachelor programme to a bachelor degree within the same college. Elsewhere, transfer to a bachelor degree almost always required a change of institution.

Reviews of fitness and funding

- **Sub-bachelor qualifications figure variously and sometimes prominently in recent country reviews of higher and further education**. In England, a proliferation of vocational qualifications led to calls for simplification, regulation and clear progression, especially at the higher levels. In Scotland, a commission on widening access sought more demanding targets in the progression of sub-bachelor students from colleges to universities. A review of higher education in Wales looked to expand part-time and work-based provision. Another proposed a single authority for the post-compulsory sector. A new strategy for apprenticeships in Northern Ireland required that they be mapped to international frameworks.

- **Higher level apprenticeships and approved technical education qualifications represent the latest attempt to reform intermediate-level education and training**. Since 2017, a UK-wide apprenticeship levy has been paid by large employers to support the funding of training, skills and workforce development. Although the setting of training levies is a power reserved to the UK Government, policy for skills and apprenticeships is a fully devolved matter. In all countries, part of the levy funding is being used to expand higher level apprenticeships. In England, the introduction of the levy is accompanied by wide-ranging proposals to reform the regulatory architecture of tertiary education. One of the two new regulatory bodies in higher education is required to maintain a register of public and private providers. Another body will oversee the whole of technical education and set standards for a new band of higher level technical qualifications.

Issues for debate and investigation

- **The respective roles of sector bodies are neither clear nor joined at the sub-bachelor levels**. Following the creation of new higher and further education sectors in 1992, the central authorities for higher education have been responsible for all sub-bachelor undergraduate education and for prescribed higher education in further education colleges other than in Scotland. In all UK countries, however, the situation of higher level professional and technical qualifications was relatively neglected by the central authorities. Only with the recent push for higher level apprenticeships was this challenged. Awkward questions have been posed about respective responsibilities for quality and standards where sub-bachelor qualifications are embedded in apprenticeships and where employers define the skills and knowledge required for employment. After some delay, a settlement was reached in England on responsibility for the quality assessment of apprenticeships at the sub-bachelor levels. At present, there is no characteristics statement for these apprenticeships whereas work is already underway on a statement for a later and separate category of degree apprenticeships.

- **An approved set of higher level technical qualifications will have implications for all types of sub-bachelor higher education**. The proposals for a two-track system of academic and technical education in England extends to the higher levels, with bridging provision to permit movement between the two routes. Only a limited number of technical education qualifications will be recognised. They will meet employer-set national standards, be matched to specific occupational areas and be eligible for public funding through fee loans. On one reading, these qualifications are intended to reverse the decline in sub-bachelor undergraduate qualifications, with responsibility for all education and training at these levels potentially coming under the new body for apprenticeships and technical education. In another scenario, a new set of short-cycle sub-bachelor awards will be added to the existing qualifications at these levels, so increasing the span of subjects and fields taught at these levels and, it is anticipated, facilitating the movement of students between different types, levels and providers of tertiary education and training.

- **The re-making of separate sector architectures is potentially problematic for integration, articulation and progression at the sub-bachelor levels**. Given the two-type character of sub-bachelor higher education, undergraduate and higher level, one explanation for the failure of policy in this area has been structural. Sector divisions and asymmetries of power, funding and standing between higher and further education have undermined reform efforts, especially in England. A joint funding council in Scotland has achieved a limited measure of coordination.

Following a review in Wales, a single strategic authority will be established for the whole of post-compulsory education. The new regulatory architectures proposed for England appear to reproduce the same tertiary divisions as before. The levels of student mobility achieved hitherto in the English system have been due more to agreements between individual institutions and rather less to the working of a credit system.

- **Not all providers of sub-bachelor courses will be on the new register of higher education providers**. For providers in England not seeking to access public funding, or looking to obtain a Home Office Tier 4 licence, a basic status will be available on the register. As presently proposed, their higher education courses must match the academic standards of the qualifications framework for higher education. In addition, they must subscribe to the independent student complaints body. Since providers can join the register on a voluntary basis, there is the possibility that some sub-bachelor provision will not be subject to these requirements.

- **Significant stretches of sub-bachelor higher education are poorly understood and under-investigated**. In light of current policy proposals, areas for specific inquiry in relation to sub-bachelor higher education include the concept and conduct of higher level apprenticeships; the contribution of different types of private provider; the nature of higher level professional and technical qualifications; the awarding and accrediting activities of professional bodies; the market for validation services; the contexts and conditions for the award of credits and units; and the movement of students between providers and sectors. While the scale, complexity and reform of sub-bachelor higher education in England demand particular attention, a comparison of developments across the four UK countries will assist policy learning in each jurisdiction.

1 Introduction

Compared to higher education at the bachelor and postgraduate levels, courses of sub-bachelor higher education are more diverse in their types of qualifications, their locations of study and their student populations. These are features of sub-bachelor provision in the UK as a whole and among its four constituent countries. Historically, advanced courses below the bachelor degree were one of the largest segments of British higher education. At the time of the Robbins inquiry into higher education in the early 1960s, the number of students studying at these levels rivalled those pursuing bachelor degrees and outnumbered those undertaking postgraduate qualifications. By the time of the Dearing inquiry in the 1990s, the situation had reversed. Today, they are the smallest section of higher education, behind provision for the bachelor degree and that for postgraduate education.

Although a decreasing share of UK higher education, the number and range of qualifications represented at the sub-bachelor levels is nevertheless large and wide. Furthermore, it was at these levels that the only two new major qualifications in higher education were introduced in the post-Robbins period. The first, in the 1970s, was the Diploma of Higher Education. The second, at the opening of the new century, was the Foundation Degree. These new awards joined the HND and HNC, along with a host of higher level professional, technical and occupational qualifications, in an assorted band of sub-bachelor higher education.

The heterogeneity and complexity of this zone of higher education has remained, despite being eclipsed by the growth of bachelor and postgraduate education. Qualifications at the sub-bachelor levels differ in their modes, styles and functions. Their courses are taught by higher education institutions, by further education colleges and sometimes by training organisations. The same sub-bachelor qualifications might be offered by public and private providers. These might be studied in the classroom or the workplace or both, as when embedded in higher level apprenticeships. Alternatively, they might be studied online (in part or whole) or through various forms of distance education. Funded in a variety of ways, the quality and standards of such programmes are assessed by different agencies. A number of bodies award, license, validate and regulate these qualifications.

The student population is similarly diverse in its age and its social, economic and educational background. Typically, entry to programmes is based on academic and vocational qualifications, combined with work and life experience. As adult students, they frequently combine study and employment. As young people, they join direct from school or college. Together, they leave with short-cycle qualifications geared to the world of work or, increasingly, they continue their higher education and graduate with a bachelor degree. For some, the aim is to secure their first employment. For others, it might be to re-enter the workforce or achieve advancement in their place of work. In some cases, it might involve a change in career or occupation.

Another source of difference is the situation of sub-bachelor higher education in the four countries of the UK. In England, the proportion of higher education at the sub-bachelor levels is the smallest. In Scotland and Northern Ireland, it is the largest, with most sub-bachelor students taught in their further education sectors. In Wales, sub-bachelor higher education is mostly a responsibility of higher education establishments. In part, these country variations reflect a long history of administrative devolution in the case of Scotland and, more recently, the impact of political devolution on policies for higher and further education in Scotland, Wales and Northern Ireland.

For all these reasons, a description of sub-bachelor higher education and higher level qualifications is less than straightforward. Compared to other parts of higher education, there have been few attempts to comprehend its forms and features. In this report, we sketch

some of the main trends and present-day patterns in the study of sub-bachelor higher education in the UK and its constituent countries. Before that, in Section 2, we examine the terminologies and definitions applied to sub-bachelor qualifications. Rather than 'non-degree', 'sub-degree' or 'other undergraduate', we justify our preference for the term 'sub-bachelor'. One of the benefits of this designation is that undergraduate awards and higher level qualifications are considered and treated in common.

For the first time, from the mid-1980s, sub-bachelor awards began to be positioned within embryonic credit transfer schemes and early qualifications frameworks. With the national frameworks for higher education qualifications introduced in the next decade came generic descriptors for framework levels, including for qualifications below the bachelor degree. One effect of these developments was to change the description of some sub-bachelor awards. We therefore give special attention to the succession of frameworks put in place over this period.

In Section 3, we provide a statistical picture of the present-day numbers and proportions of students enrolled on courses at the sub-bachelor, bachelor and postgraduate levels. This is for the UK as a whole and, separately, for England, Scotland, Wales and Northern Ireland. This enumeration is based on all higher education students taught at higher education institutions and further education colleges. Where it is available, administrative data on offshore provision and apprenticeships at the sub-degree levels is reported. Sub-bachelor qualifications are also offered by private providers in the UK but administrative data is only collected on courses designated for public funding.

A summary account of the historical development of sub-bachelor higher education in the UK is given in Section 4. In particular, we examine its situation at three points and periods: during the life of the Robbins inquiry (1961-63); under the binary policy which ended in 1992; and in the post-binary years, especially following the report of the Dearing Inquiry in 1997. Over this 50-year period, three features are highlighted: the addition of new qualification types at the sub-bachelor levels; the changing functions of sub-bachelor awards; and the declining proportion of students studying for sub-bachelor qualifications.

In Section 5, we enumerate the main types of sub-bachelor qualifications in the four countries of the UK, their patterns and profiles, their locations of study and their awarding bodies. The forms taken by these qualifications are described, including their subjects of study and their vocational, professional and occupational orientations. The characteristics of the student population are described and the contributions of sub-bachelor higher education to widening participation are reviewed.

Finally, in Section 6, we consider the future of sub-bachelor qualifications in the context of major reforms proposed for higher and further education in England, reviews of higher education funding and the post-compulsory system in Wales, and a strategy for apprenticeships in Northern Ireland. In Scotland, we examine the recommendations of a commission on widening access to strengthen the role of higher national qualifications as a progression route to bachelor degrees.

Our report is based on the assembly and analysis of administrative data supplied by the UK-wide Higher Education Statistics Agency (HESA) and by the government departments and associated organisations responsible for collecting statistical information on higher and further education in the devolved administrations. Our consideration of definitional, contextual and interpretive questions is referenced to relevant policy, professional and academic literatures. Although we draw on several sources and list them as references, our study is not a comprehensive or systematic review of the literature on sub-bachelor higher education.

At the end of the report there is a note on the statistical information we have used. Given the span of undergraduate and higher level qualifications at the sub-bachelor levels and their enumeration by separate bodies, the sources of data and their composition are a matter of importance. The base year for administrative data is 2014-15, the most recent available at the time of the research. Where we report data for earlier years or from other studies, we make clear their provenance.

2 What is sub-bachelor higher education?

In this report, we use the term sub-bachelor higher education to denote the qualifications and credits awarded by UK degree-awarding bodies and other awarding organisations at levels below the bachelor degree. These qualifications include the Foundation Degree, the Higher National Diploma (HND), the Higher National Certificate (HNC), the Diploma of Higher Education (DipHE), the Certificate of Higher Education (CertHE), National Vocational Qualifications (NVQs) and a range of professional qualifications and other diplomas and certificates.

In each of the countries of the UK, sub-bachelor higher education is provided by both higher education institutions and further education colleges, albeit in varying combinations and proportions. Sub-bachelor qualifications awarded by UK authorities are also taught and studied in other parts of the world. In England, all the main types of sub-bachelor qualification are represented. In recent years, an increasing number of private providers have programmes at these levels. Foundation Degrees are not routinely offered in Scotland. Relative to England, smaller bands of higher level professional and vocational qualifications are found in Scotland, Wales and Northern Ireland.

Historically, provision at the sub-bachelor levels was generally labelled 'non-degree' or 'sub-degree' education since only awards at the bachelor and postgraduate levels in the UK carried the title of degree. Following the introduction of the Foundation Degree in England in 2001, and thereafter in Wales and Northern Ireland, such terms were no longer an accurate or appropriate description. With the arrival of Foundation Degrees, these and other sub-bachelor qualifications were frequently termed 'intermediate-level qualifications' (Robertson, 2002). On the one side, they were matched to labour market needs 'at the intermediate skills level'. On the other, they offered progression to the higher levels of education and training, including the bachelor degree.

2.1 Two categories of sub-bachelor higher education

Since then, two other nomenclatures have gained currency in the UK, especially in England. Although occasionally used interchangeably, they refer to separate sets of provision.

2.1.1 Higher education at the other undergraduate levels

The qualifications in the first group - the Foundation Degree, HND, DipHE, HNC and CertHE - are regarded as 'undergraduate' higher education, although distinctly less so in the case of the HND and HNC in Scotland. With the bachelor degree as the highest level of undergraduate education, this first set of qualifications is 'at the other undergraduate levels'. This is how the Higher Education Statistics Agency (HESA) and the Quality Assurance Agency for Higher Education (QAA), organisations established in the 1990s with a UK-wide remit, came to describe these awards (and their Scottish equivalents) in their data collections and qualifications frameworks.

These qualifications are awarded and validated by institutions with taught degree awarding powers (usually universities), by further education colleges with powers to award the Foundation Degree, or by other awarding organisations. Except in Scotland where the HND and HNC are the responsibility of the Scottish Qualifications Authority (SQA), the monitoring of the quality and standards of this provision is undertaken by QAA.

In England and Wales, the qualifications and programmes in this category of sub-bachelor higher education are sometimes called 'prescribed' courses. This description has its origin in the regulations, from the late 1980s, specifying which higher education courses were eligible for support from the higher education funding councils established at that time. The HNC

was originally omitted from the prescribed list but was included after 1998. While the higher education funding bodies could support all the main provision undertaken by higher education institutions, they could only fund prescribed courses of higher education in further education colleges.

2.1.2 Higher level education, training and skills

The second set of awards - an assortment of courses leading to professional, technical, occupational and specialist vocational qualifications - is commonly regarded as outside of undergraduate education. Its diplomas, certificates and other awards are styled 'higher level' education, training and skills; or, sometimes, simply 'higher level skills'.

These qualifications are owned or controlled by a host of awarding organisations. In England, where most of the provision of this type is found, these awarding organisations and their qualifications are regulated by the Office of Qualifications and Examinations Regulation (Ofqual). Where they attract public funding, these courses are subject to inspection by the Office for Standards in Education, Children's Services and Skills (Ofsted) under the common inspection framework applied to further education provision. In the devolved administrations in Scotland, Wales and Northern Ireland such higher level qualifications are the responsibility of the relevant regulatory authority and, as necessary, come under its arrangements for recognition, monitoring and review.

Since they were not on the list of courses available to receive funds from the higher education funding bodies in England and Wales, the term 'non-prescribed' came to be applied to this provision. However, at the discretion of the funding bodies for further education, some of these courses might receive public support. A significant proportion of higher level programmes were so funded, although their number gradually reduced over time. Those not in receipt of public funding were usually full-cost programmes, where students or their employers or both paid for the costs of tuition and examination.

2.1.3 Sub-bachelor qualifications, higher level apprenticeships and qualifications frameworks

Both categories of sub-bachelor qualifications (undergraduate and higher level), together with study leading to the award of credits, are included in our broad definition of sub-bachelor higher education. In this definition, we also take account of the various types of higher level apprenticeships in the UK. These are programmes where, through the combination of study and on-the-job training, the outcomes of learning are specified at the higher education or higher levels on the relevant qualifications framework. At the sub-bachelor levels, these might result in an undergraduate qualification or a professional or occupational award.

In this way, our definition of sub-bachelor higher education is intended to encompass all the main organised forms of education and training with learning outcomes specified at these levels. While we argue for an inclusive definition, our preference for the term 'sub-bachelor' is not unequivocal since it is still a title referenced to another (superordinate) type and level of higher education: namely, the bachelor degree.

Furthermore, in bringing together these different sets and styles of qualification, we assume no necessary coherence or complementarity among these programmes. Indeed, compared to bachelor and postgraduate education this is a 'complicated level of provision; a kind of catch-all category for everything that is not a degree' (Tight, 2009). Before the use of qualification frameworks to plot and position many of the main sub-bachelor awards, any family resemblances were assumed rather than explained or demonstrated:

> There seems to be little clear rationale why qualifications are regarded as falling into the category commonly termed HE sub-degree. In many cases, the main determinant of why a particular qualification was categorised in this way, or not, would appear to be historical accident, often not unconnected with the requirements of funding. Hitherto, explicit criteria of level seem only exceptionally to have played any part in such decisions. (Wright and Ellis, 2000: 38)

Although now referenced to qualification frameworks, levels and descriptors, sub-bachelor higher education is still a heterogeneous zone of provision. Courses differ in their closeness to the world of work, their modes and locations of study, and their functions as exit or transfer qualifications. They are offered by public and private providers. Their degrees, diplomas, certificates and credits are awarded by a variety of organisations. Even today, their description and enumeration is no simple matter.

The historical development of these qualifications is traced in Section 4. In the rest of this section, we describe the positioning of sub-bachelor higher education in the qualifications frameworks operating in the UK and within international classifications and frameworks. For administrative and policy purposes, sub-bachelor qualifications are now referenced to, if not defined by, their positions in a hierarchy of levels: below the bachelor degree and, except in Scotland, above the level of upper secondary education. In each of the countries of the UK, there are separate and shared qualifications frameworks addressed exclusively to higher education as well as to education and training at all levels, including higher education. Sub-bachelor awards find a place on all these frameworks.

2.2 Sub-bachelor higher education in early UK qualifications frameworks

Before QAA introduced its frameworks for higher education qualifications (FHEQs) for England, Wales and Northern and for Scotland, the Council for National Academic Awards (CNAA) had devised a credit accumulation and transfer scheme (1985-1992) for higher education based on four levels. The first two were at the sub-bachelor levels, followed by the bachelor degree and the master's degree. The CNAA was abolished in 1992 and, through its pioneering work on graduate standards, the Higher Education Quality Council developed principles and generic rules for a higher education credit and qualifications framework (HEQC, 1997). It was left to the Dearing Committee to recommend that QAA endorse immediately the framework for higher education qualifications proposed for England, Wales and Northern in its 1997 inquiry report. In this eight-level framework, Levels H1 (certificate) and H2 (diploma) were below the bachelor degree.

> Higher National (HN) programmes should be structured so that the HNC is at level H1, and the HND at level H2. This represents the adoption throughout the UK of present practice at level H2. This does not mean that we want to see an end to the type of programme which currently leads to an HNC. We support a diversity of routes to level H2, including those based full-time in higher education as well as part-time, work-based routes, so long as all lead to similar levels of achievement and people understand this. But, in encouraging the practice of lifelong learning, we see value in the Scottish practice of having a recognised qualification which represents the equivalent of one year's full-time work (the HNC) and one denoting the equivalent of two years' work (the HND). (NCIHE, 1997a: 151)

Here was a powerful illustration of the role of a qualifications framework not just in positioning a long-standing sub-bachelor qualification but in changing and standardising its description. Where previously the HNC, in England, was essentially the part-time, work-based equivalent of the full-time HND, it was now a qualification to be studied full-time or part-time and awarded after the equivalent of one full-time year of study.

At the request of the responsible government department, and as part of its work on the development of national qualification frameworks, QAA undertook an investigation into the actual and potential provision of qualifications at H1 and H2 (Wright and Ellis, 2000). The aim was to provide – 'it seems for the first time' – a map of sub-degree qualifications in further and higher education. Although the statistical coverage was confined to England, its concern was to clarify the position of H1 and H2 awards in general and propose level descriptors for these sets of qualifications.

The national framework for higher education qualifications in Scotland was a recommendation of the Garrick Committee, the standing committee for Scotland within the UK-wide Dearing inquiry (NCIHE, 1997b). The Garrick Committee proposed to the higher education providers in Scotland, QAA, the SQA and the Scottish Advisory Committee on Credit and Access that they should adopt 'an integrated qualification framework based around level of study'. This was to be based on credit points, in line with the already well-established Scottish Credit Accumulation and Transfer Scheme (SCOTCAT).

This proposal was developed as an integral part of a Scottish Credit and Qualifications Framework (SCQF) which embraced all Scottish qualifications from school to postgraduate education. There were six higher education levels within the SCQF: four undergraduate levels and two postgraduate levels. Sub-bachelor qualifications were located at Level 7 (CertHE, HNC) and Level 8 (DipHE, HND). Given the four-year pattern of the bachelor degree in Scotland, Level 9 was defined by the Ordinary degree and Level 10 by the Honours degree. The placing of the honours and the non-honours bachelor degree at different levels was also followed by the Dearing Committee and then by QAA in its first version of the FHEQ for England, Wales and Northern Ireland.

The four-year degree structure, combined with the breadth of the secondary school curriculum, enabled Scottish students to enter higher education one year earlier than their counterparts elsewhere in the UK. However, many young people stayed on for a further year at school to improve their grades in Highers or to study for new Highers. As a result of the Higher Still reforms announced in 1994, a new two-year qualification - the Advanced Higher - was proposed. This had implications for the new qualifications framework proposed by the Garrick Committee. In the pre-Garrick qualifications framework, Scotland mirrored England, Wales and Northern Ireland in having the HNC mark the boundary between qualifications at the higher education and secondary education levels. In the post-Garrick framework, the HNC and the Advanced Higher were positioned at the same level. This was an additional example of Scottish distinctiveness in sub-degree higher education, although only occasionally remarked upon in comparisons of national frameworks.

Given a secondary school curriculum designed to articulate with further and higher education qualifications, the creation of a national qualifications framework for Scotland met with fewer impediments than south of the border. In the rest of the UK, there was no alignment between the eight-level higher education framework proposed by the Dearing Committee and the five-level National Qualifications Framework (NQF) for general, vocational and occupational qualifications in England, Wales and Northern Ireland (QCA, ACCAC and CCEA, 2000). In the NQF, the first three levels covered secondary education and the other two levels spanned higher education. Sub-bachelor qualifications were included alongside the bachelor degree in Level 4 while Level 5 was referenced to postgraduate awards. In 2004, both these levels were subdivided to create a nine-level national qualifications framework. This allowed the NQF to better align with its equivalent for higher education, the FHEQ for England, Wales and Northern Ireland.

The old NQF had its origins in the five-level framework developed for all vocational qualifications by the National Council for Vocational Qualifications (NCVQ). This body was established in 1986 to reform and rationalise the large number and variety of existing

vocational qualifications. Its framework of levels was used by the NCVQ to introduce and endorse competence-based National Vocational Qualifications (NVQs) in England, Wales and Northern Ireland. These were based on recognised occupational standards and achieved through work-based assessment and training. In Scotland, the equivalent qualifications were known as Scottish Vocational Qualifications (SVQs).

The NQF was replaced by the Qualifications and Credit Framework (QCF) in 2010. This was intended to serve as a credit transfer system for qualifications in England, Wales and Northern Ireland. In the event, this proved problematic and the QCF was replaced in 2015 by the Regulated Qualification Framework (RQF) for general and vocational qualifications in England and for vocational qualifications in Northern Ireland. The nine-level RQF is regulated by Ofqual (Ofqual, 2015). Levels 4 to 8 match those in the FHEQ. In Wales, the NQF was replaced by the Credit and Qualifications Framework for Wales (CQFW) with the same nine levels as the RQF.

The relationship between these frameworks and their numbering systems has sometimes been a source of confusion, especially in England and particularly at the sub-bachelor levels. Since 2003, QAA has operated two parallel and interlinked frameworks for higher education in the UK: the FHEQ; and the FQHEIS. As noted earlier, the framework for Scotland was developed as part of the wider SCQF and its higher education levels are those of the SCQF.

While there is equivalence between the FHEQ and the FQHEIS at honours level and above, below this level 'the frameworks reflect the particular features of the different educational structures and contexts' (QAA, 2001a; 2001b). These differences are reviewed in the remainder of this section, along with the positioning of sub-bachelor qualifications in international frameworks and classifications, including the Framework for Qualifications of the European Higher Education Area (QF-EHEA). Examples of the typical higher education qualifications awarded within each level of the FHEQ and the FQHEIS are shown in Table 2.1, together with their corresponding QF-EHEA cycle (QAA, 2014).

Table 2.1: Examples of the typical higher education qualifications at levels of the frameworks for higher education qualifications in the UK and their corresponding cycle in the QF-EHEA

<table>
<tr><th rowspan="2">Typical higher education qualifications awarded by degree-awarding bodies within each level</th><th>FHEQ</th><th>FQHEIS</th><th rowspan="2">Corresponding QF-EHEA cycle</th></tr>
<tr><th>FHEQ level</th><th>SCQF level</th></tr>
<tr><td>Doctoral degrees (for example, PhD/DPhil, EdD, DBA, DClinPsy)</td><td>8</td><td>12</td><td>Third cycle (end of cycle) qualifications</td></tr>
<tr><td>Master's degrees (for example, MPhil, MLitt, MRes, MA, MSc)</td><td rowspan="5">7</td><td rowspan="5">11</td><td rowspan="3">Second cycle (end of cycle) qualifications</td></tr>
<tr><td>Integrated master's degrees (for example, MEng, MChem, MPhys, MPharm)</td></tr>
<tr><td>Primary qualifications (or first degrees) in medicine, dentistry and veterinary science (for example, MB ChB, MB BS, BM BS; BDS; BVSc, BVMS)</td></tr>
<tr><td>Postgraduate diplomas</td><td rowspan="2"></td></tr>
<tr><td>Postgraduate Certificate in Education (PGCE)/Postgraduate Diploma in Education (PGDE)</td></tr>
</table>

<table>
<tr><td>Postgraduate certificates</td><td></td><td></td><td></td></tr>
<tr><td>Bachelor's degrees with honours (eg BA/BSc Hons)</td><td rowspan="5">6</td><td>10</td><td rowspan="2">First cycle (end of cycle) qualifications</td></tr>
<tr><td>Bachelor's degrees</td><td rowspan="3">9</td></tr>
<tr><td>Professional Graduate Certificate in Education (PGCE) in England, Wales and Northern Ireland</td><td rowspan="3"></td></tr>
<tr><td>Graduate diplomas</td></tr>
<tr><td>Graduate certificates</td></tr>
<tr><td>Foundation Degrees (for example, FdA, FdSc)</td><td rowspan="3">5</td><td>NA</td><td rowspan="3">Short cycle (within or linked to the first cycle) qualifications</td></tr>
<tr><td>Diplomas of Higher Education (DipHE)</td><td>8</td></tr>
<tr><td>Higher National Diplomas (HND) awarded by degree-awarding bodies in England, Wales and Northern Ireland under licence from Pearson</td><td>NA</td></tr>
<tr><td>Higher National Certificates (HNC) awarded by degree-awarding bodies in England, Wales and Northern Ireland under licence from Pearson</td><td rowspan="2">4</td><td>NA</td><td rowspan="2"></td></tr>
<tr><td>Certificates of Higher Education (CertHE)</td><td>7</td></tr>
</table>

Source: QAA (2014)

2.3 Sub-bachelor qualifications in the FHEQ

The FHEQ is a five-level framework for higher education qualifications of degree-awarding bodies (typically, universities with the power to award degrees) in England, Wales and Northern Ireland. The levels are numbered 4 to 8. The preceding levels 1 to 3 are those on the Regulated Qualifications Framework. Sub-bachelor qualifications are at Levels 4 and 5. Since the implementation of the first version of the FHEQ there has been a reallocation of some of the qualifications at these levels. In 2008, the non-honours bachelor degree was moved out of Level 5 (where it sat alongside the Foundation Degree, HND and DipHE) and into Level 6 (where it joined the bachelor degree with honours).

At each level of the FHEQ there are 'qualification descriptors'. These exemplify the general nature and outcomes of the typical or main type of qualification at a given level. The descriptor at Level 4 is for the CertHE. This qualification should meet the descriptor in full and should be used as a 'reference point' for other qualifications aligned with this level, including the HNC. The descriptor at Level 5 is the Foundation Degree and this is a reference point for other qualifications at this level, such as the DipHE and the HND.

2.3.1 FHEQ qualification descriptor at Level 4

Certificates of Higher Education are awarded to students who have demonstrated:

- knowledge of the underlying concepts and principles associated with their area(s) of study, and an ability to evaluate and interpret these within the context of that area of study
- an ability to present, evaluate and interpret qualitative and quantitative data, in order to develop lines of argument and make sound judgements in accordance with basic theories and concepts of their subject(s) of study.

Typically, holders of the qualification will be able to:

- evaluate the appropriateness of different approaches to solving problems related to their area(s) of study and/or work
- communicate the results of their study/work accurately and reliably, and with structured and coherent arguments
- undertake further training and develop new skills within a structured and managed environment.

And holders will have:

- the qualities and transferable skills necessary for employment requiring the exercise of some personal responsibility (QAA, 2014: 21).

In addition: 'Holders of a Certificate of Higher Education will have a sound knowledge of the basic concepts of a subject, and will have learned how to take different approaches to solving problems. They will be able to communicate accurately and will have the qualities needed for employment requiring the exercise of some personal responsibility. The Certificate of Higher Education may be a first step towards obtaining higher level qualifications'.

2.3.2 FHEQ qualification descriptor at Level 5

Foundation degrees are awarded to students who have demonstrated:

- knowledge and critical understanding of the well-established principles of their area(s) of study, and of the way in which these principles have developed
- ability to apply underlying concepts and principles outside the context in which they were first studied, including, where appropriate, the application of those principles in an employment context
- knowledge of the main methods of enquiry in the subject(s) relevant to the named award, and ability to evaluate critically the appropriateness of different approaches to solving problems in the field of study
- an understanding of the limits of their knowledge, and how this influences analyses and interpretations based on that knowledge.

Typically, holders of the qualification will be able to:

- use a range of established techniques to initiate and undertake critical analysis of information, and to propose solutions to problems arising from that analysis
- effectively communicate information, arguments and analysis in a variety of forms to specialist and non-specialist audiences and deploy key techniques of the discipline effectively
- undertake further training, develop existing skills and acquire new competences that will enable them to assume significant responsibility within organisations.

And holders will have:

- the qualities and transferable skills necessary for employment requiring the exercise of personal responsibility and decision-making (QAA, 2014: 23).

In addition: 'Holders of qualifications at this level will have developed a sound understanding of the principles in their field of study, and will have learned to apply those principles more widely. Through this, they will have learned to evaluate the appropriateness of different approaches to solving problems. Their studies may well have had a vocational orientation, for example HNDs, enabling them to perform effectively in their chosen field. Holders of qualifications at this level will have the qualities necessary for employment in situations requiring the exercise of personal responsibility and decision making'.

As the FHEQ is comprised of qualifications awarded by degree-awarding bodies, only those HNCs and HNDs awarded by such bodies are included in the framework. This will include the HNCs and HNDs awarded by degree-awarding bodies under licence from Pearson. The HNCs and HNDs awarded directly by Pearson - the majority - are regulated qualifications at Levels 4 and 5 respectively of the RQF and the CQFW. They are subject to the academic standards and regulations of Pearson and the requirements of the RQF and CQFW. This is because Pearson is not an awarding body but an awarding organisation regulated by Ofqual.

2.4 Sub-bachelor qualifications in the FQHEIS

The FQHEIS is a six-level framework for qualifications of higher education institutions in Scotland. It is 'nested' in the SCQF. The SCQF levels for qualifications of higher education institutions are numbered 7 to 12. Sub-bachelor qualifications on the FQHEIS are at SCQF Levels 7 and 8. The descriptor for SCQF Level 7 is the CertHE, a qualification 'available in a number of Scottish higher education institutions typically as an exit award after the equivalent of one year of full-time study'. Some are awarded for 'achievement over a breadth of subject areas while others focus on one subject, in some cases with a strong vocational focus'. The descriptor for SCQF Level 8 is the DipHE, a qualification 'typically offered after the equivalent of the first two years of full-time higher education'. As for the CertHE, the DipHE is awarded for achievement in breadth or a focus on one subject. In both cases, the precise focus and outcomes will be identified in 'the definitive record for the relevant programme' (QAA, 2014).

In Scotland, the HNC and HND are qualifications awarded exclusively by the Scottish Qualifications Authority. They are at Levels 7 and 8 respectively of the SCQF.

2.4.1 FQHEIS qualification descriptor at SCQF Level 7

Certificates of Higher Education are awarded to students who have demonstrated:

- an outline knowledge of the scope and main areas of the subject(s) and its links with related subjects, and a more extensive knowledge of some of the key areas
- an understanding of the major theories, principles and concepts
- familiarity with some of the routine materials, techniques and practices of the subject
- skills for the gathering, basic analysis, and presentation of routine information, ideas, concepts and quantitative and qualitative data within a clearly defined context. This will include the use of information and communications technology (ICT) as appropriate to the subject.

Typically, holders of the CertHE will be able to:

- use their knowledge of the subject and its techniques in a routine manner to evaluate and formulate a range of arguments and solutions to problems and issues of a routine nature
- communicate the results of their study and other work accurately and reliably, and within structured and coherent arguments
- undertake further learning within a structured and managed environment
- apply their subject-related and transferable skills in contexts where individuals may have some limited personal responsibility, but the criteria for decisions and the scope of the task are well defined (QAA, 2014: 22).

2.4.2 FQHEIS qualification descriptor at SCQF Level 8

Diplomas of Higher Education are awarded to students who have demonstrated:

- a knowledge and understanding of the scope and main areas of the subjects(s) and its interactions with related subjects. Detailed knowledge of some key areas which may include some knowledge of current issues in limited specialised areas
- familiarity and understanding of a range of the essential theories, principles and concepts and an awareness of major issues at the forefront of the subject(s)
- familiarity and effective deployment of essential/routine materials, techniques and practices of the subject(s)
- skills for the gathering, critical analysis and presentation of information, ideas, concepts and/or quantitative and qualitative data that is core to the subject(s). This will include the use of ICT as appropriate to the subjects.

Typically, holders of the qualification will be able to:

- use their knowledge, understanding and skills to critically evaluate and formulate evidence-based arguments and identify solutions to clearly defined problems of a generally routine nature
- communicate the results of their study and other work accurately and reliably using a range of specialist techniques
- identify and address their own major learning needs within defined contexts and to undertake guided further learning in new areas
- apply their subject-related and transferable skills in contexts where the scope of the task and the criteria for decisions are generally well defined, but where some personal responsibility and initiative is required (QAA, 2014: 24).

2.5 Sub-bachelor qualifications in international frameworks and classifications

Internationally, sub-bachelor qualifications were early defined by the Organisation for Economic Cooperation and Development as 'short-cycle higher education' (OECD, 1973). In the 1997 International Standard Classification of Education (ISCED), sub-bachelor programmes were aligned with Level 5 ('the first stage of tertiary education') in a seven-level hierarchy running from to 0 to 6. Within Level 5 a distinction was drawn between ISCED 5A and 5B. Level 5A consisted of 'largely theoretically based programmes intended to provide qualifications for gaining entry into more advanced research programmes and professions with higher skills requirements'. In Level 5B they were 'typically shorter, more practical/ technical/occupationally specific programmes leading to professional programmes'. Where Level 5A spanned the bachelor and master's levels, Level 5B was home to the sub-bachelor levels (UNESCO, 1997).

Following revision, a new 10-level ISCED 2011 classification has sub-bachelor higher education at Level 5 ('short-cycle tertiary education'), with 'post-secondary non-tertiary education' at Level 4 and 'bachelor or equivalent' at Level 6.

> The content of ISCED level 5 programmes is noticeably more complex than in upper secondary programme(s) giving access to this level. ISCED level 5 programmes serve to deepen knowledge by imparting new techniques, concepts and ideas not generally covered in upper secondary education …
>
> Programmes classified at ISCED level 5 may be referred to in many ways, for example: higher technical education, community college education, technician or advanced/higher vocational training, associate degree, bac+2. For international comparability purposes, the term 'short-cycle tertiary education' is used to label ISCED level 5. (OECD et al, 2015: 73)

Within Europe, following the Bologna Declaration of 1999, 48 countries have come together to build the European Higher Education Area (EHEA). In 2005, the Bergen Conference of European Ministers Responsible for Higher Education adopted an overarching framework of qualifications in the EHEA. In this three-cycle framework, bachelor degrees and sub-bachelor qualifications constitute the first QF-EHEA cycle. Within national contexts, the possibility of 'intermediate qualifications' was acknowledged, as in Table 2.1 where Foundation Degrees, DipHEs and HNDs are described as short-cycle qualifications within or linked to the first cycle. However, CertHEs, HNCs and other certificates at this level are not regarded as short-cycle qualifications within the first cycle as defined by the Dublin descriptors and the QF-EHEA. That is why in Table 2.1 the final cell in the column showing the correspondence between QF-EHEA cycles and typical UK higher education qualifications is shaded (QAA, 2014).

3 What size and share of higher education?

Like the population of students studying for bachelor degrees and postgraduate qualifications awarded by UK institutions and organisations, those pursuing sub-bachelor qualifications and credits are located in five main settings. Within the UK, most are registered at higher education institutions, although some of these are franchise students taught in further education colleges. The second largest group are registered at further education colleges. These two sets of publicly funded establishments account for the majority of sub-bachelor students and programmes. A third group are apprentices in paid employment who combine working with studying for sub-bachelor qualifications, usually in association with a college, university or training organisation. Others are studying for sub-bachelor awards wholly outside the UK, as offshore students at the branch campus of a UK provider, at an overseas partner organisation or by way of a distance-learning programme. A fifth group are enrolled on courses designated for public funding at private providers based in the UK. There are other students enrolled for sub-bachelor courses at private providers but their numbers are not known.

Administrative data on sub-bachelor higher education and higher level qualifications is reasonably comprehensive for students in higher education institutions and further education colleges. That for individuals working and studying as apprentices is reported variously in the four UK countries. Statistical information on offshore students is based on a small number of data fields. Administrative data on students at private providers is only collected in respect of courses designated for student financial support. For the majority of students and courses at private providers there is no current annual collection of data by national agencies. A note on the sources of data is included as an annex to this report.

In this section, we present the actual, partial or estimated numbers studying at the sub-bachelor levels in each of these settings in 2014-15. Except for designated courses at private providers in England (the only jurisdiction where public funding can be accessed this way), the coverage is for all parts of the UK. For comparison between sub-bachelor, bachelor and postgraduate education, we present numbers for the UK as a whole and for each constituent country. A more detailed look at the distribution of sub-bachelor courses, qualifications and students in higher education institutions and further education colleges is found in Section 5. A summary picture of sub-bachelor higher education in apprenticeship, private and offshore locations is reported in this section.

3.1 Students studying in the UK and offshore for qualifications and credits at the sub-bachelor levels

In 2014-15, there were at least 446,000 students studying for higher education and higher level qualifications (and credits) at the sub-bachelor levels, as awarded by UK higher education providers or UK awarding organisations (Table 3.1).

Table 3.1: Students studying for an award of a UK higher education provider or a UK awarding organisation by level of study and type of provision,[1] United Kingdom, 2014-15 (Thousands)

		Postgraduate	Bachelor	Sub-bachelor	Total
UK					
	Higher education institutions	538.2	1524.2	203.7	2266.1
	Further education colleges	3.0	24.3	162.3	189.6
	Private providers with public funding[2]		24.2	26.1	50.2
	Apprenticeships			38.7[3]	38.7
	Offshore	118.9	529.5	15.6	663.9
	All	660.1	2102.2	446.4	3208.5

Source: HESA, Skills Funding Agency, Scottish Funding Council, Skills Development Scotland, Welsh Government and Northern Ireland Department for Employment and Learning

Notes:

1 Franchise students registered at higher education institutions and taught at further education colleges are included in the totals for higher education institutions.
2 Only in England are certain undergraduate courses at private providers designated for public funding.
3 Includes small numbers undertaking apprenticeships at the bachelor and postgraduate levels.

With another 2,102,000 pursuing bachelor qualifications and 660,000 undertaking postgraduate awards, the sub-bachelor share of the total was small, at 14 per cent. Within the sub-bachelor segment, some four out of five students (82 per cent) were studying in higher education institutions and further education colleges. The remainder were participating in apprenticeships (nine per cent), or receiving public funds to study at private providers (six per cent) and or studying wholly offshore (three per cent).

In Table 3.2, the numbers and proportions of higher education and higher level students participating in these types of provision is shown for England, Scotland, Wales and Northern Ireland. Figures for the Open University - a distance learning university for the whole of the UK - are shown separately in this table and discussed separately in this section of the report.

Table 3.2: Students studying for an award of a UK higher education provider or a UK awarding organisation by level of study, type of provision[1] and country, United Kingdom, 2014-15 (Thousands)

	Postgraduate	Bachelor	Sub-bachelor[2]	Total
England				
Higher education institutions	434.0	1163.2	139.7	1737.0
Further education colleges	3.0	22.1	102.9	127.9
Private providers with public funding[3]		24.2	26.1	50.2
Apprenticeships			29.7	29.7
Offshore	92.2	498.3	15.0	605.4
All	529.2	1707.8	313.4	2550.2
Scotland				
Higher education institutions	55.7	143.9	18.7	218.4
Further education colleges	0.0	1.1	47.6	48.7
Apprenticeships			0.8	0.8
Offshore	18.3	19.4	0.5	38.2
All	74.0	164.4	67.6	306.1
Wales				
Higher education institutions	27.8	75.3	22.6	125.7
Further education colleges	0.0	0.4	0.9	1.3
Apprenticeships			7.9	7.9
Offshore	7.8	11.1	0.1	19.0
All	35.6	86.8	31.5	153.9
Northern Ireland				
Higher education institutions	11.1	35.4	6.1	52.7
Further education colleges	0.1	0.7	10.9	11.7
Apprenticeships			0.3	0.3
Offshore	0.6	0.7	0.0	1.3
All	11.8	36.8	17.3	66.0
Open University	9.5	106.3	16.5	132.3

Source: HESA, Skills Funding Agency, Scottish Funding Council, Skills Development Scotland, Welsh Government and Northern Ireland Department for Employment and Learning

Notes:

1 Franchise students registered at higher education institutions and taught at further education colleges are included in the totals for higher education institutions.
2 Includes small numbers undertaking apprenticeships at the bachelor and postgraduate levels.
3 Only in England are certain undergraduate courses at private providers designated for public funding.

Excluding the Open University, the sub-bachelor population in England was the largest in the UK but its share of all higher education in England was smaller than elsewhere, at 12 per cent. While the sub-bachelor population in Northern Ireland was the smallest, its share of all higher education in that jurisdiction was the largest, at 26 per cent. Sub-bachelor numbers in Scotland were the second largest and accounted for 22 per cent of its total higher education. The numbers participating in sub-bachelor higher education in Wales were the second smallest in the UK. Its share of higher education (at 21) per cent was marginally smaller than in Northern Ireland and Scotland yet considerably larger than in England.

Despite their smaller relative volumes and proportions, sub-bachelor programmes make a significant contribution to the overall numbers in part-time higher education. In the remainder of this section, this feature is examined in the sub-bachelor higher education offered by higher education establishments, further education colleges and private providers with designated courses. In addition, aspects of the size and shape of provision made for apprentices and offshore students are reviewed.

3.2 Full-time and part-time students studying at the sub-bachelor levels in higher education institutions and further education colleges in the UK

Of the 2,456,000 students registered and taught at higher education institutions and further education colleges in the UK - the core territories of UK public higher education - 366,000 were studying for qualifications at the sub-bachelor levels (Table 3.3).

Table 3.3: Students studying for higher education and higher level qualifications in higher education institutions (including the Open University) and further education colleges by level of study and mode of study, United Kingdom, 2014-15 (Thousands)

		Full-time	Part-time	Total	% Share
UK					
	Postgraduate	305.9	235.3	541.2	22%
	Bachelor	1350.4	198.1	1548.5	63%
	Sub-bachelor	108.4	257.6	366.0	15%
	All levels	1764.7	691.0	2455.7	100%

Source: HESA

The sub-bachelor segment represented 15 per cent of the higher education students taught at publicly funded universities and colleges, with another 22 per cent pursuing postgraduate qualifications and the majority (63 per cent) undertaking bachelor degrees. Whereas most students on postgraduate and bachelor programmes were defined as full-time, seven out of 10 of those on sub-bachelor courses were studying on a part-time basis. Of the part-time population as a whole, the number and proportion of part-time students was largest in the sub-bachelor category (257,000 or 37 per cent), followed by postgraduate education (235,000 or 34 per cent) and bachelor education (198,000 or 29 per cent).

3.3 Full-time and part-time students studying at the sub-bachelor levels in higher education institutions and further education colleges in England, Scotland, Wales and Northern Ireland

Across the four UK nations, each very different in the size of their higher education populations, there were differences too in the shape of their higher education and the share taken by students studying at the sub-bachelor levels (Table 3.4).

Table 3.4: Students studying for higher education and higher level qualifications in higher education institutions and further education colleges by level of study, mode of study and country, United Kingdom, 2014-15 (Thousands)

	Full-time	Part-Time	Total	% Share
England				
Postgraduate	252.0	184.0	437.0	23%
Bachelor	1108.0	77.4	1185.3	64%
Sub-bachelor	62.3	180.3	242.6	13%
All levels	1422.2	442.7	1864.9	100%
Scotland				
Postgraduate	33.4	22.3	55.7	21%
Bachelor	137.0	8.0	145.0	54%
Sub-bachelor	36.8	29.5	66.4	25%
All levels	207.3	59.8	267.1	100%
Wales				
Postgraduate	15.5	12.3	27.8	22%
Bachelor	72.4	3.3	75.7	60%
Sub-bachelor	4.4	19.0	23.5	18%
All levels	92.3	34.6	127.0	100%
Northern Ireland				
Postgraduate	4.8	6.4	11.2	17%
Bachelor	33.0	3.1	36.1	56%
Sub-bachelor	4.8	12.2	17.0	27%
All levels	42.7	21.7	64.4	100%
Open University				
Postgraduate	0.2	9.3	9.5	7%
Bachelor	0.0	106.3	106.3	80%
Sub-bachelor	0.0	16.5	16.5	13%
All levels	0.2	132.1	132.3	100%

Source HESA.

Excluding the Open University, there were nearly 1,865,000 higher education students registered at universities and colleges in England, four-fifths of the UK total. Just 13 per cent or 243,000 students were enrolled on sub-bachelor programmes. By contrast, Scotland had one-quarter of its 267,000 higher education students located at these levels; and Northern Ireland had 26 per cent of its 64,000 higher education students at the same levels. In both these jurisdictions, unlike in England and Wales, the sub-bachelor population was larger than the postgraduate population. In Scotland, the size of its sub-bachelor higher education was more significant again given the longer typical length of the bachelor degree (four years) than elsewhere in the UK. In Wales, the proportion of higher education students in the sub-bachelor segment was 18 per cent (close to 24,000 students out of a total of 127,000).

The larger percentages of sub-bachelor students in Scotland, Wales and Northern Ireland were reflected in their relative shares of part-time students. More than one-half of the part-time population in higher education in Northern Ireland (56 per cent) and Wales (55 per cent) were studying at the sub-bachelor levels. In Scotland, the equivalent proportion was 49 per cent. England, on the other hand, had just 41 per cent of its part-time students at these levels.

3.4 Full-time and part-time students registered at the sub-bachelor levels at higher education institutions and further education colleges in the UK

Sub-bachelor higher education in the UK is largely undertaken in publicly funded higher education institutions and further education colleges. In 2014-15, slightly more than one-half of sub-bachelor students (204,000 or 56 per cent) were registered by higher education establishments compared to 162,000 or 44 per cent registered by further education colleges. In both sets of institutions, sub-bachelor students were mostly part-time registrations: three-quarters of those in higher education institutions and nearly two-thirds of those in further education colleges (Table 3.5).

Table 3.5: Students studying for higher education and higher level qualifications in higher education institutions (including the Open University) and further education colleges (excluding franchise students) by level of study and mode of study, United Kingdom, 2014-15 (Thousands)

	Higher education institutions			Further education colleges			All institutions		
	Full-time	Part-time	Total	Full-time	Part-time	Total	Full-time	Part-time	Total
UK									
Postgraduate	305.4	232.7	538.2	0.5	2.6	3.0	305.9	235.3	541.2
Bachelor	1340.6	183.6	1524.2	9.8	14.5	24.3	1350.4	198.1	1548.5
Sub-Bachelor	51.1	152.6	203.7	57.3	105.0	162.3	108.4	257.6	366.0
All levels	1697.1	568.9	2266.1	67.6	122.0	189.6	1764.7	691.0	2455.7

Source: HESA

The actual numbers of sub-bachelor students taught (rather than simply registered) at these levels is marginally higher at further education colleges and correspondingly lower at higher education institutions as a result of franchise relationships. These are arrangements

whereby higher education establishments sub-contract the teaching of some of their registered students to partner further education colleges. They make up most of the sub-bachelor numbers taught at Welsh further education colleges and a significant minority of those taught in further education colleges in England. Information on franchise students and their higher education courses is not routinely published in standard statistical digests. We examine the size and significance of this part of the sub-bachelor population later in the report.

Behind the registered numbers for sub-bachelor higher education are not only differences in the location of teaching but differences as well in the types of sub-bachelor qualifications offered in the higher education sector and the further education sector. Here, we simply highlight variations in the numbers registered in the two sectors across the four countries of the UK.

3.5 Full-time and part-time students registered at the sub-bachelor levels at higher education institutions and further education colleges in England, Scotland, Wales and Northern Ireland

Across the UK as a whole (excluding the Open University), slightly more sub-bachelor students were registered at higher education institutions than at further education colleges. This was not the case in Scotland and Northern Ireland (Table 3.6). More than double the number of sub-bachelor registrations in Scotland were taken by further education colleges: some 48,000 in the college sector compared to 19,000 in the higher education sector. In Northern Ireland, nearly two-thirds of sub-bachelor registrations were in the colleges.

Table 3.6: Students studying for higher education and higher level qualifications in higher education institutions and further education colleges (excluding franchise students) by level of study, mode of study and country, United Kingdom, 2014-15 (Thousands)

		Higher education institutions			Further education colleges			All institutions		
		Full-time	Part-time	Total	Full-time	Part-time	Total	Full-time	Part-time	Total
England										
	Postgraduate	251.1	182.5	434.0	0.5	2.5	3.0	252.0	184.0	437.0
	Bachelor	1099.3	63.9	1163.2	8.6	13.4	22.1	1108.0	77.4	1185.3
	Sub-bachelor	41.0	98.8	139.7	21.3	81.5	102.9	62.3	180.3	242.6
	All levels	1391.7	345.2	1737.0	30.5	97.4	127.9	1422.2	442.7	1864.9
Scotland										
	Postgraduate	33.4	22.3	55.7	0.0	0.0	0.0	33.4	22.3	55.7
	Bachelor	136.2	7.7	143.9	0.8	0.3	1.1	137.0	8.0	145.0
	Sub-bachelor	5.2	13.6	18.7	31.6	16.0	47.6	36.8	29.5	66.4
	All levels	174.8	43.6	218.4	32.5	16.2	48.7	207.3	59.8	267.1
Wales										
	Postgraduate	15.5	12.3	27.8	0.0	0.0	0.0	15.5	12.3	27.8
	Bachelor	72.2	3.1	75.3	0.2	0.2	0.4	72.4	3.3	75.7
	Sub-bachelor	4.3	18.2	22.6	0.1	0.8	0.9	4.4	19.0	23.5
	All levels	92.0	33.6	125.7	0.3	1.0	1.3	92.3	34.6	127.0
Northern Ireland										
	Postgraduate	4.8	6.3	11.1	0.0	0.1	0.1	4.8	6.4	11.2
	Bachelor	32.8	2.6	35.4	0.2	0.5	0.7	33.0	3.1	36.1
	Sub-bachelor	0.6	5.5	6.1	4.2	6.7	10.9	4.8	12.2	17.0
	All levels	38.3	14.4	52.7	4.4	7.3	11.7	42.7	21.7	64.4
Open University										
	Postgraduate	0.2	9.3	9.5				0.2	9.3	9.5
	Bachelor	0.0	106.3	106.3				0.0	106.3	106.3
	Sub-bachelor	0.0	16.5	16.5				0.0	16.5	16.5
	All levels	0.2	132.1	132.3				0.2	132.1	132.3

Source: HESA

In England, 42 per cent of sub-bachelor registrations were at colleges and 58 per cent were at universities. In Wales, nearly all (96 per cent) those registered at the sub-bachelor levels were at institutions in the higher education sector, with just four per cent in the further education sector. As we show in Section 5 of the report, the majority of sub-bachelor students in these two countries were taught by higher education institutions, even after franchise students were added to the college totals.

3.6 Sub-bachelor higher education and the Open University

It is important to note the contribution of the Open University to sub-bachelor higher education. As a distance education provider with a modular-credit course structure and nearly all of its students studying on a part-time basis, the Open University has long been regarded as a national (UK) university. Notwithstanding its course system, its undergraduate modules were mainly referenced to the bachelor degree rather than to other undergraduate qualifications. Indeed, before 2003-04 the data returned by the Open University did not provide a split between the bachelor and the other undergraduate levels, with credits being counted towards the award of a bachelor degree. After that date, Open University students were reported according to their 'recorded award intention'. However, these students did not have to declare an award intention and many were still reported as studying for institutional credit.

That said, some 16,000 students were returned as sub-bachelor registrations in 2014-15 (Table 3.6). These comprised four per cent of all sub-bachelor registered students in the UK but they represented a more substantial segment (eight per cent) of those enrolled at these levels in UK higher education institutions.

As a national university with its administrative centre in England, Open University student numbers were allocated by HESA to England. From 2013-14, they were allocated to England, Scotland, Wales and Northern Ireland based on their domicile. Not only was the Open University different in having its students studying at a distance, hardly any were international students. Furthermore, given the structure and content of the undergraduate curriculum, those returned as sub-bachelor students were most likely to be studying subjects within the humanities, social sciences and sciences, rather than engaged in more vocational fields. For these reasons, we report information on the Open University separately in those tables which allow for comparison between types of providers and between the qualification profiles of the UK countries.

3.7 Full-time and part-time students studying for designated undergraduate courses at the sub-bachelor levels at private providers in England

Access to loans and grants for eligible students on designated courses at private providers is mostly for full-time undergraduate education. In 2014-15, there were similar numbers in receipt of student financial support in bachelor (24,000) and sub-bachelor (26,000) programmes (Table 3.7). Nearly all these students (95 per cent) were described as engaged in full-time study. The numbers reported on these courses also included those who were not in receipt of public funding.

Table 3.7: Students on designated courses of undergraduate education at private providers by level of study and mode of study, England, 2014-15 (Thousands)

	Full-time	Part-time	Total	% Share
England				
Bachelor	23.7	0.5	24.2	48%
Sub-bachelor	23.9	2.1	26.1	52%
All undergraduate levels	47.7	2.6	50.2	100%

Source: HESA

This enumeration is based on data collected from 63 alternative providers. The term alternative provider is used by government departments and agencies to refer to any provider of higher education courses which is not in direct receipt of recurrent funding from public authorities and which is not a further education college. Included in this category are 'a wide range of providers which are for-profit, not-for-profit and charities' (BIS, 2016a). Provision of higher education by alternative providers is much wider than this (Shury et al, 2016), although the numbers of students and levels of their courses are not known.

3.8 Individuals undertaking higher level apprenticeships in England, Scotland, Wales and Northern Ireland

As with course designation for alternative providers, the policy to expand apprenticeships at the levels of higher education is a recent one. Unlike the measures to open the higher education market to alternative providers, a reform specific to England, the expansion of apprenticeships is a goal of governments in each of the UK countries. In each as well is the aim to increase the number of apprenticeships at the undergraduate and postgraduate levels, although there are differences in how apprenticeships are titled, administered, reported and aligned to qualification levels in each jurisdiction. Especially at the levels of higher education, new strands or styles of apprenticeship have been introduced that overlap with, or are intended to replace, existing types. However, at this point of time, the bulk of higher level apprenticeships are at the sub-bachelor levels (including at the level of the ordinary degree in Scotland).

Table 3.8: Individuals undertaking higher level apprenticeships by level of study and country, United Kingdom, 2014-15 (Thousands)

		Higher Apprenticeships (at FHEQ Levels 4+)	Level 4 & 5 Modern Apprenticeships (at SCQF Levels 8+)[1]	Higher Apprenticeships (at FHEQ Levels 4+)	Pilot Higher Level Apprenticeships (at FHEQ Levels 4+)[2]	Total
UK						
	England	29.7				29.7
	Scotland		0.8			0.8
	Wales			7.9		7.9
	Northern Ireland				0.3	0.3
	All					38.7

Source: Skills Funding Agency, Skills Development Scotland, Welsh Government and Department for Employment and Learning

Notes:

1 Excludes those on apprenticeships leading to the HNC at SCQF Level 7.
2 Estimated by the Northern Ireland Department for Employment and Learning.

Given the assortment of types and terminologies, and because many span more than one qualification level, we use the single term – higher level apprenticeships - for all those positioned at the higher education levels. In this way, the numbers reported or estimated for higher level apprenticeships in Table 3.8 are those at FHEQ Level 4 and above in England, Wales and Northern Ireland, and those at SCQF Level 8 and above in Scotland. This is to exclude those on apprenticeships that might lead to an HNC at SCQF Level 7. This is because Level 3 Modern Apprenticeships in Scotland were positioned at SCQF Levels 6 and 7.

In the data published by Skills Development Scotland for 2014-15, like that reported by the Skills Funding Agency and the Welsh Government, it was not possible to assign higher level apprenticeships to a specific qualification framework level (rather than to the group of levels by which they were defined). In the case of Northern Ireland, higher level apprenticeships were the subject of pilot programmes and the number of apprentices was estimated by the Department for Employment and Learning.

Hence, the numbers brought together in Table 3.8 should be treated as indicative.
In England, there were close to 30,000 higher level apprentices, most working and studying at the sub-bachelor levels. Elsewhere, the numbers in Wales were larger than those for Scotland and Northern Ireland. In Scotland, higher level apprenticeships were considered to begin at SCQF Level 8, even though the HNC was aligned with SCQF Level 6.

3.9 Offshore students studying for sub-bachelor qualifications awarded by UK higher education providers or awarding organisations in England, Scotland, Wales and Northern Ireland

Of the five main settings for higher education at levels below the bachelor degree, the number and proportion of sub-bachelor students was smallest in respect of offshore

provision. Around 16,000 out of 664,000 students (two per cent of the total) were studying for a sub-bachelor qualification awarded by a UK higher education provider or an awarding organisation (Table 3.9).

Table 3.9: Students studying wholly overseas for UK higher education qualifications by level of study and country, United Kingdom, 2014-15 (Thousands)

	Postgraduate	Bachelor	Sub-bachelor	Total
England				
Registered at UK provider	77.9	142.5	11.9	232.3
Studying for award of UK provider	14.3	355.8	3.1	373.1
All	92.2	498.3	15.0	605.4
Scotland				
Registered at UK provider	14.0	14.9	0.5	29.5
Studying for award of UK provider	4.2	4.5	0.0	8.7
All	18.3	19.4	0.5	38.2
Wales				
Registered at UK provider	5.3	3.0	0.1	8.4
Studying for award of UK provider	2.5	8.0	0.0	10.6
All	7.8	11.0	0.1	19.0
Northern Ireland				
Registered at UK provider	0.6	0.0	0.0	0.6
Studying for award of UK provider	0.0	0.7	0.0	0.7
All	0.6	0.7	0.0	1.3
United Kingdom				
Registered at UK provider	97.8	160.5	12.5	270.7
Studying for award of UK provider	21.1	369.0	3.1	393.2
All	118.9	529.5	15.6	663.9

Source: HESA

For each UK country, official statistics distinguish between those registered at a UK higher education provider and those studying for an award of a UK higher education provider (where the student might be registered with a partner organisation or through some other arrangement). In the case of England, which accounted for 90 per cent of all UK offshore students studying for sub-bachelor awards, those registered with a UK higher education provider were the majority, at 79 per cent. For the bachelor students, the picture was reversed, with 356,000 out of 498,000 (71 per cent) registered with an overseas partner or through another compact.

4 How has it developed?

Four major features have characterised the history and development of sub-bachelor higher education in the period since 1945. First, the higher education offered at these levels has largely been a responsibility of non-university institutions and, after 1992, by these same establishments in their status as 'new' universities, or as higher education colleges, or as further education colleges. At this date, the former polytechnics and the colleges of higher education were brought into a unified sector of higher education with the existing universities. The further education colleges were established in their own sector. Except in Scotland, where the college role in sub-bachelor higher education was retained, the further education colleges in England, Wales and Northern Ireland were expected to concentrate on courses at the levels below higher education. This two-sector structure of higher education and further education has remained in each of the UK countries, with sub-bachelor programmes taught on both sides of this divide, albeit in differing configurations.

Second, over the last 50 years, students on sub-bachelor courses have become a smaller proportion of UK higher education, being overtaken and eclipsed by the growth of bachelor and postgraduate education. While courses of sub-bachelor higher education shared in the expansion leading to mass levels of participation at the end of the 1980s, their growth was slower than that at the bachelor and postgraduate levels. In the recent period, the numbers studying for sub-bachelor qualifications in the UK have declined, both absolutely and proportionally. This was the trigger for interventions by government, especially in England, to change the pattern of demand for undergraduate education and increase the share of higher education taken by sub-bachelor programmes.

Since the 1980s, and in some cases earlier, qualifications such as the HND, HNC and DipHE have increasingly functioned as staged awards or access routes to the bachelor degree. This third feature of sub-bachelor higher education has seen its major awards operate as both exit and transfer qualifications. As exit qualifications, the HND and HNC traditionally gave access to, or were undertaken alongside, technician-level and technician-type occupations. As transfer qualifications, they enabled students to continue their studies at the higher undergraduate levels, either at a higher education establishment or, more recently, through a 'top-up' degree at a further education college. At the same time, qualifications such as the DipHE and CertHE, have become more vocationally-oriented, serving specific professional occupations while retaining their long-standing transfer functions.

A fourth feature and factor in all these developments has been the lower status generally accorded to undergraduate qualifications at the certificate and diploma levels. Some but not all of these qualifications had their roots in vocational and technical education, where the majority of students studied part-time in colleges and whose provision included advanced and non-advanced further education. Other sub-bachelor qualifications, such as the DipHE, had their origins in the reform and reorganisation of teacher education in the 1970s. The introduction of the Foundation Degree at the opening of the new century - a sub-bachelor qualification titled for the first time a 'degree' - was the latest attempt to achieve parity of esteem between academic and vocational qualifications, between full-time and part-time modes, and between bachelor and short-cycle undergraduate education.

Linked to the status of sub-bachelor qualifications was the extent to which these programmes and pathways were widely known, beyond the specific education, training and employment sectors they ordinarily served. As undergraduate qualifications, the HND and HNC, the DipHE and CertHE, and the Foundation Degree have since acquired a greater visibility through their inclusion and positioning in the qualifications frameworks for higher education in the UK. Since 2012, standardised web-based information about these and other undergraduate courses has been made available to prospective students to guide their

choice-making. No such information has been collected and reported on sub-bachelor courses leading to professional, technical and occupational qualifications. This reflected the specialist nature of many of these programmes, some of which continue to enjoy a high standing in their related occupational fields.

In this section of the report, the role and place of sub-bachelor qualifications is considered in terms of larger changes and movements in the development of British higher education. The present-day features of sub-bachelor programmes and qualifications are outlined in Section 5.

4.1 Sub-bachelor higher education at the time of the Robbins inquiry

When the Robbins Committee reviewed the scale and scope of British higher education at the beginning of the 1960s, students on 'non-degree' courses were in the majority and nearly all were taught in non-university institutions (Committee of Inquiry, 1963a). However, unlike today, there was no clear line drawn between the levels of different qualifications. Included in the non-degree category were qualifications deemed equivalent, similar or close to the standard of the 'first' (bachelor) degree at the honours level or at the ordinary or pass level. Other types of non-degree provision, including courses leading to professional qualifications, were not necessarily referenced to the levels of awards outside their own fields.

Within the non-degree group were the Diploma in Technology (a national award of honours degree standard), the HNC, the HND, professional and art qualifications, college diplomas and the Teacher's Certificate. Except for the Certificate course offered by teacher training institutions, most of these non-degree programmes were taught in further education establishments. In the further education system, they were styled 'advanced' courses. Advanced further education led to qualifications of a higher standard than A Level. Also taught in the further education system were external degrees awarded by the University of London and a small amount of postgraduate provision.

The Diploma in Technology (DipTech) - a qualification offered by Colleges of Advanced Technology and awarded by the National Council for Technological Awards (NCTA) - was accepted as equivalent to that of an honours degree. The course was full-time, normally over four years and included a period of industrial training. The entry qualifications were two A Level passes or a 'good pass' in the Ordinary National Certificate (ONC) or the Ordinary National Diploma (OND).

In the case of the HNC and the HND, both qualifications were 'considered by the Ministry of Education to be roughly equal to the level of a pass degree' (Committee of Inquiry, 1963b). In the HNC, this level was achieved over 'over a more restricted range of subjects' than for a HND which involved the study of 'a rather wider range of subjects to the same level'. Cantor and Roberts (1972) described the HND as of 'near pass-degree' standard and, although the standard of an HNC course 'may be roughly comparable' to that of an HND, it achieved less coverage in depth and consequently had a 'more superficial approach'. It was this 'which essentially separates them'.

The HND was awarded after a full-time or sandwich course lasting usually for three years. Its students entered with one or more A Level passes, or with an OND or ONC. The HNC was studied part-time (during the day, the evening or both) for a minimum of two years. Most of its students had undertaken three or more years part-time study for the ONC. Whereas some of the students taking the HND had entered direct from school, this normally required a preparatory course for entry to the HNC (Committee of Inquiry, 1963b).

Other advanced students were studying for professional qualifications in science and technology as well as subjects like accountancy, law, commerce and architecture. In science and technology, students might study throughout for the examinations of the professional institutions, commonly through courses provided in further education establishments. Others obtained partial or total exemption from the professional examinations by means of degrees, HNDs and HNCs, associateships and other exempting qualifications. In business and commerce, there were few qualifications apart from a degree which gave any measure of exemption from the final professional examinations. On the other hand, many professional associations did not require their students to undertake any period of formal instruction. For those that did, some provided this education themselves in their own schools. Nevertheless, there was still a good deal of formal public education provided for commerce, with most students reading for professional qualifications and studying part-time in the day or evening.

Nearly all advanced art education was by continuous study, mostly for the two-year National Diploma in Design (NDD). A smaller number of full-time students were aiming at college diplomas or associateships in art. A new Diploma in Art and Design had been introduced and would gradually supersede the present examinations. Unlike the NDD, the new diploma was intended to be the equivalent in standard to a university degree.

The other major type of non-degree qualification was the three-year full-time 'general' course for intending school teachers leading to the award of a Teacher's Certificate. While those holding a bachelor degree normally took a one-year postgraduate course in education, the non-graduate entrants took the three-year course provided by the training colleges in England and Wales and by the colleges of education in Scotland. The three-year course had been introduced in England and Wales only in 1960. Although the standard reached at the end of the certificate course was difficult to compare directly with that reached by university students - 'because the nature of the courses in the two types of institution is rightly so different' - there were a good number of students who reached in their main subjects a standard 'close to' or 'broadly comparable' with that of a pass degree (Committee of Inquiry, 1963b).

Accordingly, one of the proposals of the Robbins Committee was that there should also be a four-year Bachelor of Education (BEd) course leading both to a degree and to a professional qualification 'for suitable students'. In England and Wales, these courses would be provided in training colleges (now to be renamed colleges of education).

Although the Robbins Committee was asked to review only full-time higher education, the work of the inquiry ranged more widely. Furthermore, its recommendations for a pattern of future growth centred on full-time courses of undergraduate education, chiefly in the university sector, invited questions about the purpose, quality and standards of all types and levels of higher education. Such was the range of data made available by the Robbins inquiry that the volume and share of higher education taken by non-degree students can be indicated (Table 4.1).

Table 4.1: Students in higher education by level of study and type of institution, Great Britain, 1962-63 (Thousands)

	Universities[1]	Teacher training institutions	Further education establishments[2]	Total
Postgraduate and bachelor degree[3]	127.1	2.0	19.4	148.5
Non-degree	0.0	52.5	130.8	183.3
All	127.1	54.5	150.2	331.8

Source: Committee of Inquiry (1963b)

Notes:

1 Excludes occasional and extra-mural students.
2 Includes the Central Institutions in Scotland.
3 Includes the Diploma in Technology.

Some 183,000 students or 55 per cent of the total higher education population in Great Britain were enrolled on non-degree courses. Those on bachelor degrees accounted for another one-third and those undertaking postgraduate studies were nine per cent of the total. The addition of adults enrolled on university extra mural and other short courses would have brought provision by the universities into the non-degree category. The great majority of these courses did not lead to certification and, for this reason, were not included by the Robbins inquiry in the enumeration of mainstream provision. The Robbins review also identified around 29,000 students taking courses of 'private study', mostly by correspondence, leading to various professional qualifications. These would have added to the numbers, already significant, who were studying for similar awards in further education establishments. Located outside the public system, the information on this provision was insufficient for a detailed examination and comparison with their counterparts in further education.

4.2 A binary policy for higher education

The relative positioning of qualifications was not a direct concern of the Robbins inquiry, yet from this period the distinction between bachelor and other types of higher level education was to be accorded more attention and importance. One element in this change was the focus on full-time undergraduate education in future growth policies, with the costs of teaching and student grants met from public funding. The Robbins report recommended that the universities should take the majority of this expansion. This pattern of growth was rejected by the incoming Labour Government but the intention to expand full-time places, especially at the bachelor level, was endorsed. Over the next quarter-century, a 'binary' policy was pursued by all administrations in which the major further education establishments, led by newly designated polytechnics, would share in the growth of full-time numbers. Their role would be complementary to the universities and the colleges of education.

Another factor making for more explicitness and transparency in the distinction between bachelor and sub-bachelor higher education was the creation of the Council of National Academic Awards which replaced the NCTA in 1964. Up to this point, only universities awarded the bachelor degree. As recommended in the Robbins report, but now expected to oversee standards and awards in a much expanded non-university sector, the CNAA differed from the NCTA in awarding degrees at honours and pass levels and in covering areas of study outside science and technology (Silver, 1990). Made up of representatives of

universities, senior further education establishments and industry, its major remit was to award degrees at comparable standards to those of the universities. As a result of the decision to focus a great deal of advanced work in a new generation of polytechnics, the CNAA was to be increasingly involved in the approval and review of first degree courses, with consequences for the placing and standing of non-degree qualifications.

Given that most advanced further education students were studying for qualifications outside or below the levels of the bachelor degree, their courses were under the aegis, not of the CNAA, but other examining, validating and awarding authorities. The OND/HND and ONC/HNC were designed as consecutive courses. Both were operated by Joint Committees composed of representatives of the professional institutions, the colleges, the teachers and the government education department. Syllabuses were submitted to the Joint Committees for approval. HND examinations were set internally by the colleges and assessed externally by an examiner appointed by the relevant professional institution. HNC examinations were either set internally or set externally by one of the Regional Examining Boards. Many colleges prepared students directly for the examinations of professional institutions and some offered advanced courses by the City and Guilds of London Institute (CGLI). A number of colleges also awarded their own diplomas and associateships 'which cover a wide range of subjects and are of varying standards' (Cantor and Roberts, 1972).

Under a binary policy, this diversity was intended to continue. While the universities would continue to make their own 'unique' contribution, the further education establishments had a threefold role to play in higher education. Associated with these functions were the different types, levels and modes of advanced further education, each maintaining close contact with the world of employment and preparing students for technical, technological and professional occupations.

> First, they will provide full-time and sandwich courses for students of university quality who are attracted by the more vocational tradition of the colleges, and who are more interested in applying knowledge to the solution of problems than in pursuing learning for its own sake.…Their second function, of vital importance today, falls outside the scope of normal university work. They have the primary responsibility for providing full-time and sandwich courses which, while falling within the higher education field, are of a somewhat less rigorous standard than degree level courses. It is here that the colleges meet the needs of the thousands of young people who will occupy the all-important intermediate posts in industry, business and the professions - the high-level technicians and middle managers who must support the scientists, technologists and top managers in a modern community.…Thirdly, there are the tens of thousands of part-time students who need advanced courses either to supplement other qualifications, or because for one reason or another they missed the full-time route. There are immense fields of talent and aspiration here; common justice and social need combine to demand that they should be harvested. (Secretary of State, 1965: 2-4)

Relationships between degree and non-degree qualifications, their standards and their providers, were emphasised again in the White Paper: 'A Plan for Polytechnics and Other Colleges' (DES, 1966). The polytechnics were not intended to have a monopoly of full-time advanced education and they were expected to develop as comprehensive institutions offering full-time, sandwich and part-time courses 'at all levels'. Provision for part-time students, especially the HNC, would need to be distributed over a larger number of further education colleges. Indeed, part-time students were 'no less important' than those who had the time and ability to take full-time or sandwich courses of degree standard. Two sets of part-time students were in view: those seeking a qualification 'below degree standard', and second, those who, being in employment, could find time only for part-time courses during the day or evening, 'whether they lead to a degree or to a qualification below that standard'.

Nevertheless, the primary objective was to concentrate full-time higher education in a limited number of strong centres equipped with the staff, buildings and facilities to 'achieve and maintain high standards' and 'provide the right setting for an active community of staff and students'. Even for part-time qualifications, the regional advisory councils were asked to examine the scope for further concentration of particular fields at selected colleges 'in order to improve educational standards and to secure the most effective use of resources'.

Where central government sought a reduction in the number of colleges offering higher education, many local authorities looked to protect a 'seamless robe' of advanced and non-advanced further education, with non-degree courses playing an important role in access
to, and through, higher education for adults and young people. Especially in the large metropolitan authorities, the opportunity for students to move from the OND and ONC to the HND and HNC and then potentially to the bachelor degree was a common aspiration, if less a realisation, in the planning and operation of further education.

By the early 1980s, there were some 273,000 students - close to one-third (32 per cent) of the total UK higher education population - enrolled on 'other advanced' courses outside the first degree and postgraduate studies (DES, 1985). The majority (68 per cent) of these students were studying part-time and most were located in over 400 'other colleges' (outside the universities, polytechnics and the Central Institutions in Scotland). By this time, there were roughly equal numbers of students in the university and non-university sectors. As before, nearly all those studying for non-degree qualifications in the public system were taught in local authority and grant-aided institutions.

4.3 Reform of teacher education and the birth of the Diploma in Higher Education

Along with the planned expansion of full-time first degree education, another major reason for the proportional decline in non-degree numbers was the rationalisation of teacher education in the 1970s and the shift to all-graduate entry in the education and training of teachers. A rapidly declining birth rate and a major economic crisis were the context for a dramatic reduction in training numbers and a radical restructuring of the colleges of education which, through closures and amalgamations, led to their disappearance as a separate sector of higher education. This contraction and reorganisation was accompanied by the replacement of the Certificate course by the Bachelor of Education degree and, much less anticipated, by the introduction of a new short-cycle qualification, the Diploma of Higher Education.

Despite the endorsement by Government of the four-year BEd and the first of these degrees awarded in 1968, there remained widespread criticism of the teacher training system, including the low standard of the Teacher's Certificate. In response, the Government appointed a Committee of Inquiry (the James Committee, 1970-72) to review the content, structure and organisation of training in England and Wales.

To work towards a graduate teaching profession, the James report (DES, 1972b) recommended the award of a new unclassified 'professional degree', the BA (Ed), after completion of two years 'personal' higher education and a further two years of 'professional' training. The preference of ministers was for a three-year course leading to the Ordinary BEd and to qualified teacher status. Those attaining a sufficiently high standard in the three-year course could, if they wished, continue for a fourth year to take an Honours BEd degree.

Although the James Committee proposed no major institutional changes in the college of education sector, it recommended that the colleges should diversify their provision in the form of a two-year course of general education to be known as the Diploma of Higher

Education. In the inquiry report, the two-year course represented the first cycle in a three-cycle scheme of education and training. The first cycle (personal education) would be open to prospective teachers taking the three-year degree course and to other students who would take the two-year course leading to the DipHE. For intending teachers, the second cycle would comprise pre-service training and induction, and the third cycle would involve in-service education and training.

In its 1972 White Paper, the Government accepted that it was possible to devise three-year BEd courses in such a way that the first two years could lead to a DipHE. However, its own proposals looked to the introduction of a range of two-year courses of higher education 'in a wider context and with a wider purpose' (DES, 1972a). Since only a limited range of two-year programmes were then available, 'all in specific vocational areas', they would fill a 'gap' in existing provision. The DipHE would have six characteristics:

1 they must be 'no less demanding intellectually than the first two years of a course at degree level' and so the normal minimum entry qualification should be same as for degrees (five GCE passes including two at A Level, or the equivalent)
2 they should be offered in each of the main sectors of higher education and be available as general or specialised courses
3 the qualification must be generally acceptable as 'a terminal qualification' and in particular for entry to appropriate forms of employment
4 they should also be seen as providing 'a foundation for further study', be developed 'on a unit basis' and be designed in such a way as to 'earn credit towards other qualifications', including degrees and the requirements of professional bodies
5 the courses should be validated by existing degree-awarding bodies, including the CNAA
6 their students will qualify for mandatory grants.

In summary, the new courses were expected to introduce greater flexibility into higher education, enabling many students to 'achieve in two years, instead of three or more, as much higher education as they aspire to between school and first employment': a change which might well be supported by enlarged opportunities to take up 'serious study again in later life'. Similarly, the more widespread adoption of a break between leaving school and embarking on higher education would enable students to 'gain more experience of the world' and use higher education 'to better purpose'. Not without importance, such developments would 'make a contribution to easing the financial burden the expansion will impose'.

In contrast to the universities, the CNAA was centrally involved in establishing the new award. Whether viewed as a genuine alternative to existing provision or a device for redesigning the curriculum, the modular possibilities presented by the DipHE were attractive to the CNAA, especially ahead of a major reduction and rationalisation in teacher education during the rest of the 1970s. In the 'scramble' for diversification, it formed an important element in the thinking of the new colleges of higher education which emerged at this time (Silver, 1990). For their part, a number of polytechnics had submitted modular and interdisciplinary degree schemes to the CNAA, some referenced to their HNDs and HNCs (where units, modules and credit had already been introduced) and some with 'interim awards' to be made available through the DipHE (Pratt, 1997).

By the early 1980s, little more than 4,000 students were following DipHE courses in England and Wales. Ten years later, enrolments stood at around 8,500, with some institutions having difficulty in recruiting viable numbers, 'mainly because school-leavers with two A Levels prefer to opt for degree courses' (Cantor and Roberts, 1983). When compared with the HND and HNC, each with an entry level of one A Level or equivalent, recruitment to the DipHE was judged disappointing. It was not adopted in Scotland and, prior to binary abolition in

1992, only one university ever offered the qualification. It also failed to gain overall recognition in commerce and industry.

In the 1985 Green Paper on higher education, the Government reviewed this history and rejected calls from the National Advisory Body for Local Authority Higher Education (NAB) for its expansion as a general two-year qualification. More importance, on the other hand, should be given to the HND and HNC awarded by the Business and Technician Education Council (BTEC).

> The DipHE was originally envisaged as a terminal qualification in its own right. It has in practice become primarily an access route to a degree, particularly for mature students without the normal entry qualifications…The NAB has recommended that there should be an expansion of the DipHE as a general two-year course for school-leavers with only one A-level, as well as for mature students. But those with one A-level are already eligible for courses leading to BTEC qualifications.

Indeed:

> The BTEC HND, normally achieved after two years full-time study with an entry level of one A-level, and HNC, often studied part-time, have long been an important and valued form of provision for science, technology and business. The Government attaches importance to this pattern of provision and will use its course-approval powers as appropriate to prevent its erosion by the further growth of three-year unclassified degrees aimed at very much the same group of students and employment outlets. (DES, 1985: 25-26)

4.4 A new national machinery for technician education at all levels

From the outset, the relationship of the Diploma of Higher Education to the HND was expected to be a concern of the new bodies set up in the 1970s to oversee technician education. Following the recommendations of the Haslegrave Committee (1967-69), the Technician Education Council (TEC) was created in 1973 and the Business Education Council (BEC) established in 1974. Corresponding Scottish Councils - SCOTEC and SCOTBEC - were set up in 1975.

The previous overlapping structure of technician courses based on separate provision by the City and Guilds of London Institute (an independent national examining body) and by Joint Committees (composed of representatives of the ministry, professional bodies and colleges) was deemed confusing, over-complicated and out of step with the changing role of the technician in industry and business. Student failure and wastage rates were also high. At the same time, provision in the field of business and office studies was much less developed than in the engineering and scientific fields. Only three out of the 26 Joint Committees had been in areas to be covered by BEC. In business and public administration, the concept of technician was less familiar, employers were unclear as to their training needs and the size of demand for courses was difficult to estimate.

The new administrative and coordinating machinery provided by BEC and TEC was responsible for the planning and development of a unified national pattern of courses of technical education, including those at the higher technician levels (HND and HNC). In so doing, the two Councils would 'devise or approve suitable courses, establish and assess standards of performance, and award certificates and diplomas as appropriate' (DES, 1969). The activities of the Councils were to have far-reaching consequences for vocational higher education at the sub-bachelor levels since this was where the majority of the higher education students in the local authority system (including the polytechnics) were found.

The context for TEC and BEC was a decline in manufacturing industry, a proportional decrease in apprenticeships, a growing problem of unemployment and the rise in importance of the use of computers in both industry and business. Although with shared remits, their approaches differed. TEC saw itself as a validating rather than an examining body. Its courses and awards were at two levels (Certificate/Diploma and Higher Certificate/Higher Diploma) and, because the majority were based on units, they were not associated with particular modes of attendance. For the average student, a Higher Certificate course involved some 600 hours study. The more broadly based Higher Diploma took between 1,200 and 1,600 hours. The units were compulsory or optional or supplementary. Colleges could use ready-made standard units (designed by TEC programme committees) or they could devise their own, subject to validation guidelines. From the outset, units were graded as Pass or Merit. A grade of Distinction was added after 1981. Programmes were approved by the Council. Typically, quality monitoring comprised a mixture of internal college assessment and external moderation.

In 1981, TEC registrations stood at 24,000 for the HNC and approaching 3,000 for the HND. As for all TEC programmes, the majority were in engineering. With no previous national structure in business education at the sub-bachelor levels, the BEC registrations for its higher national awards ran to some 9,000 a year. BEC awards were at three levels (General, National and Higher National) and led to a Certificate or Diploma at each level. According to Cantor and Roberts (1983), the Council was 'a major innovative force in curriculum development'. It adopted a modular system based on core and optional modules, each module specifying general and learning objectives. BEC guidelines emphasised integration, as with 'cross modular assignments'. Assessment was by coursework and written examinations. Unlike TEC, there was no requirement for a separate general studies component in BEC programmes. Colleges were free to innovate within agreed parameters and, as with provision approved by the TEC, they were able to devise their own schemes of assessment, including the appointment of external moderators to monitor standards.

TEC and BEC were merged in 1983 to form a single national validating body, the Business and Technician Education Council. Ahead of the merger, there had been criticisms of standards on some courses and the excessive bureaucracy of their procedures. However, the different traditions of TEC and BEC were able to continue until a major reorganisation in 1988 which resulted in a more corporate approach. BTEC and its precursor bodies were more prescriptive on course content than the CNAA. In particular, BTEC took a direct interest in how courses were operated. It set out detailed criteria for quality and, along with assessment strategies and standards, the Council required moderators to report on course planning, review mechanisms, resources, recruitment, learning strategies and employer links.

In the late 1980s, BTEC became centrally involved with the work of the National Council for Vocational Qualifications, especially in validating NVQ centres and programmes. In 1990, it reached an agreement with NCVQ that ultimately all BTEC awards would lead to NVQs. Given the complexity of the exercise, the replacement of Higher Diplomas and Higher Certificates by competence-based NVQs was postponed. The intention was not revived. In 1991, the Council 'quietly changed its name' to the Business and Technology Council, a reflection of how difficult it had become to 'clearly differentiate the technician role' (Pratt, 1997). Of surprise to many, there had been private talks between BTEC and the CNAA on the possibility of merging. These came to nothing but joint validation procedures were developed for BTEC courses in the polytechnics. When the polytechnics became universities after 1992, BTEC concluded agreements with all of them to approve, operate and award BTEC HNCs and HNDs on behalf of the Council. In another move, BTEC merged with the University of London Examinations and Assessment Council in 1995 to form the Edexcel Foundation. In 2003, the for-profit organisation Pearson purchased a controlling stake in the Foundation, before acquiring full ownership in 2005.

In Scotland, SCOTEC and SCOTBEC merged in 1985 to form the Scottish Vocational Education Council (SCOTVEC). The predecessor organisations had different course specifications, different programme lengths and different standards for their qualifications. Earlier, the Scottish Education Department published its Action Plan (SED, 1983) which paved the way for a radical revision of technical and further education based on a unified modular curriculum. Modules were free-standing units of study with standard design characteristics. They might be combined to make tailored programmes for individual students or grouped to form recognised awards. By means of an extended approval and audit system, the process for developing qualifications and assuring quality was increasingly devolved to centres.

The scheme was overseen by SCOTVEC which extended the modular approach to all its main qualifications: National Certificates, Professional Development Awards, SVQs and, in 1989, HNCs and HNDs. SCOTVEC was merged with the Scottish Examination Board in 1997 to create the Scottish Qualifications Authority. Among the main functions of the SQA were the development, validation and quality assurance of qualifications below the level of the bachelor degree, including the Higher National Qualifications (known as Higher Nationals or HNs).

4.5 Sub-bachelor qualifications and the shift to mass higher education

The small numbers recruited to the DipHE in the 1970s and 1980s, together with the failure of the qualification to establish itself in the universities, meant that responsibility for most sub-bachelor higher education in the UK remained with the non-university sector. At the same time, the move to graduate entry in many professional fields saw a reduced or altered role for those sub-bachelor courses which prepared students for professional examinations. Yet, despite binary and polytechnic policies aimed at concentration of full-time provision, especially at the bachelor level, provision in the local authority sector was still highly distributed. Vocationally-oriented, sub-bachelor and part-time courses in local colleges, often linking with programmes at neighbouring polytechnics as well as serving local and regional labour markets, were key components of this dispersed system.

Following legislation in 1988, the polytechnics and the other further education institutions predominantly concerned with higher education were removed from local government control and transferred in England to a new polytechnics and colleges sector with its own funding council. The other further education establishments remained with the local authorities. As a consequence, courses of sub-bachelor higher education were offered in two non-university sectors, one devoted mainly to advanced further education (higher education) and the other mostly involved with non-advanced further education (further education). 'Prescribed' courses of higher education such as the HND and DipHE were funded by the new funding council. Where these courses were provided in the local authority sector, they were funded through contracts with the new funding council. Higher level courses not on the prescribed list, which included the HNC at this time, were funded through the local authorities.

Within Scotland, the funding for HNs in the Central Institutions came directly from central government and that for HNs in colleges came through the local authorities. In Wales, the one polytechnic and those colleges providing prescribed sub-bachelor courses were maintained by the local authorities. Their funding was determined nationally and allocated by the Wales Advisory Body for Local Authority Higher Education.

After 1992, unified sectors and separate funding councils for higher education were established in England, Scotland and Wales. In turn, the further education colleges in each country were removed from local government and given their own funding council. However,

some of the funding complexities and anomalies surrounding sub-bachelor higher education continued. In England, the HND was funded by the Higher Education Funding Council for England (HEFCE) and the HNC in colleges - as a non-prescribed course - was eligible for funding through the further education funding council. In 1999, the HNC was added to the prescribed courses able to be funded by the HEFCE. In Wales, both the HND and HNC were funded by the Higher Education Funding council for Wales (HEFCW). In Scotland, where HNs were increasingly the preserve of colleges, their funding had long been routed to the local authorities from central government. After 1999, their funding came from the Scottish Further Education Funding Council established in that year.

Between the 1988 and 1992 reforms, higher education in the UK underwent a spectacular expansion (Table 4.2). The student population increased by over 40 per cent, with enrolments for bachelor and postgraduate qualifications expanding by 53 and 57 per cent respectively. More students also studied for sub-bachelor awards but the rate of growth at these levels was considerably lower, at 17 per cent. As a result of this differential expansion the sub-bachelor share of the student population decreased from around one-third to little more than one-quarter.

Table 4.2: Students on courses of higher education (excluding the Open University) by level of study, mode of study and country, 1988 and 1992, United Kingdom (Thousands)

	1988			1992			
	Full-time	**Part-time**	**Total**	**Full-time**	**Part-time**	**Total**	**% Increase**
England							
Postgraduate	58.3	50.9	109.2	84.1	89.7	173.8	59%
Bachelor	371.5	29.1	400.6	564.6	56.9	621.5	55%
Sub-bachelor	71.8	167.3	239.1	113.6	161.6	272.2	15%
All levels	501.6	247.3	748.9	762.3	308.1	1,070.4	43%
Scotland							
Postgraduate	9.1	5.6	14.7	13.1	8.6	21.7	48%
Bachelor	61.4	3.0	64.4	85.0	6.5	91.5	42%
Sub-bachelor	15.4	30.9	46.3	22.4	31.6	54.0	17%
All levels	85.9	39.5	125.4	120.5	46.7	167.2	33%
Wales							
Postgraduate	3.8	2.6	6.4	5.3	4.0	9.3	45%
Bachelor	22.4	0.5	22.9	34.3	1.3	35.6	55%
Sub-bachelor	5.0	6.6	11.6	8.7	7.4	16.1	39%
All levels	31.2	9.7	40.9	48.4	12.7	61.1	49%
Northern Ireland							
Postgraduate	1.6	2.7	4.3	2.4	4.4	6.8	58%
Bachelor	14.3	0.4	14.7	18.0	2.6	20.6	40%

Sub-bachelor	2.1	3.1	5.1	2.8	4.4	7.2	41%
All levels	18.0	6.1	24.1	23.2	11.4	34.6	44%
UK							
Postgraduate	72.8	61.8	134.6	104.9	106.7	211.6	57%
Bachelor	469.6	33.0	502.6	702.0	67.2	769.2	53%
Sub-bachelor	94.3	207.8	302.1	147.6	205.0	352.6	17%
All levels	636.7	302.6	939.3	954.4	378.9	1333.3	42%

Source: Department for Education, Scottish Office Education Department and Department of Education Northern Ireland (1993) and HESA

Rates of growth in sub-bachelor numbers were similar in England (15 per cent) and Scotland (17 per cent) but with different effects on the proportions taken by higher education at these levels. In England, the decrease matched that for the UK as a whole. In Scotland, where the sub-bachelor segment was the largest, the share reduced by five percentage points, from 37 to 32 per cent. The sub-bachelor growth rates were highest in Northern Ireland and Wales, although from a low base.

Over this short period, higher education in the UK and within each of its countries made the breakthrough to mass scales of participation, the age participation for young people reaching 26 per cent in England and 32 per cent in Scotland (Parry, 2005). The higher participation rate in Scotland was attributed in part to the larger proportion of students enrolled in sub-bachelor higher education and the location of most of this provision in further education. Elsewhere, it was often left to the inspectorates in higher and further education to remind policymakers of the contributions made by sub-bachelor programmes to part-time, work-based and lifelong learning (DES, 1989; FEFC, 1996).

4.6 Dearing on higher education at the sub-bachelor levels

The Scottish pattern of undergraduate education and the contribution of HNs to increasing and widening participation were to be key influences on the national committee of inquiry into UK higher education (the Dearing Committee 1996-97) and its recommendations for future growth. The Dearing inquiry was set up in light of a funding crisis and a cap on full-time undergraduate places following the expansion years. To support renewed growth, it proposed a flat-rate tuition fee for full-time undergraduate education payable by graduates in work. In so doing, it considered whether the same fee should be charged for all years of study or whether it should be lower for year one or year two to encourage access to higher education and the take up of sub-bachelor courses. This option was rejected in favour of the 'simplicity' of a standard contribution for all years. The same reasoning was adopted by the Government in its introduction of tuition fees in 1998.

Although not attracting the political and media attention as its fee proposals, the inquiry recommendations on future demand for higher education were also controversial. Over the next 20 years, the Committee looked to a significant expansion of undergraduate numbers, with 'a large part of the growth taking place at sub-degree level' (NCIHE, 1997a). To this end, the cap on full-time sub-bachelor places was to be lifted immediately and before that for full-time places on bachelor degrees. According to the inquiry report, expansion at the sub-bachelor level would:

- 'likely better to reflect the aspirations of many of those who may enter this expanded system, large numbers of whom are likely to have non-standard entry qualifications and more diverse aspirations'

- 'address the UK's relative international disadvantage at these levels'
- 'support lifelong learning'
- 'include more stopping-off points with real value below the level of the first degree for more initial entrants'
- 'enable students to take clearer but flexible pathways including academic and vocational components'
- 'enable students to return to higher education later in life to take study at a higher level'
- 'help reduce drop-out'.

Just as controversial was the recommendation that, in the medium term, priority in growth in sub-bachelor higher education should be accorded to further education colleges. Wherever possible:

- 'more sub-degree provision should take place in further education colleges' (as in Scotland)
- 'higher education provision in further education colleges should be funded directly' (not through the franchised arrangements widely adopted during the growth years)
- 'there should be no growth in degree level qualifications offered by further education colleges' (an academic division of labour which would bring 'extra discipline' to level of qualifications offered by further and higher education institutions).

These proposals prompted consideration about the desirability of maintaining separate funding bodies for further and higher education. In England and Wales, one of the assumptions underpinning the 1992 legislation was that higher education be concentrated in a single sector and that the further education sector be dedicated to work below the levels of undergraduate education. In proposing a 'special mission' for colleges in sub-bachelor higher education, the Dearing recommendations challenged this policy presumption.

In Scotland, one body funded all the provision in higher education institutions and the Scottish Office funded all the provision in further education colleges, including the HNs. The Scottish Committee within the Dearing inquiry argued that these arrangements should obtain on the grounds that they were most likely to ensure successful sub-bachelor provision. This view prevailed but was rejected for England and Wales where 'the sort of sub-degree qualifications with value which we advocate…could only be achieved within the higher education context'. In the case of England, the recommendation that the higher education funding body should be responsible 'for funding all provision defined as higher education' required that the HNC be added to the list of prescribed courses.

The other way in which the Dearing inquiry influenced the profile of sub-bachelor higher education was through its advocacy of a national framework for higher education qualifications. At all levels, it observed, there was no consistent rationale for the structure or nomenclature of awards. Below the bachelor degree, the most obvious differences were between the HNC and HND in Scotland and England. In Scotland, the HNC was awarded after one (successful) year and the HND was awarded after two. In England, by contrast, 'the HNC is essentially the part-time, work-based equivalent of the full-time HND'.

At this time, the National Council for Vocational Qualifications (NCVQ) had devised a five-level framework, originally for competence-based awards, which was being progressively introduced in England, Wales and Northern Ireland. As part of its work on the standards of degrees, the Higher Education Quality Council had recommended the development of an awards framework, potentially linked to credits and levels, which would provide a rationale for different types of award and for their relationship at different levels. Since the middle of the 1980s there had been attempts by the CNAA and other organisations to develop schemes for the accumulation and transfer of credit in higher and

further education, sometimes embracing both sectors. After reviewing such models in the UK and elsewhere, a major report commissioned by the HEQC (1994) argued for the creation of a national framework of qualifications based on credit points at different levels.

In the event, the Dearing Committee put forward its own eight-level framework of higher education qualifications (from H1 to H8). This was based on credit points and aligned to levels in the NCVQ framework. Given 'historic differences in educational traditions', it acknowledged the need to have, at least in the short term, separate frameworks for Scotland and for the rest of the UK. The Committee recommended to the Government and to QAA (newly established in 1997) that they should endorse immediately its framework for England, Wales and Northern Ireland. In the meantime, it was 'practicable' to map the Scottish arrangements onto this framework. Moreover, the positioning of the HNC at Level H1 and the HND at Level H2 represented 'the adoption throughout the UK of present practice in Scotland' (NCIHE, 1997a).

4.7 Weak demand and the invention of the Foundation Degree

Although broadly accepted by the incoming Labour Government, the Dearing recommendations on sub-bachelor higher education soon fell victim to weak demand for courses at these levels, especially among the further education colleges in England that were asked to take most of the expected expansion. In an effort to stimulate growth at these levels in these institutions, the funding body for higher education in England rejected the Dearing preference for direct funding and offered colleges a choice of funding routes, including that through franchise partnerships with higher education establishments.

Neither the acceptance of franchising, nor the priority given to colleges in the allocation of funded places, nor the redefinition of the HNC as prescribed higher education, generated the targeted growth in sub-bachelor numbers. With little evidence of improved demand in the post-Dearing years, ministers came to doubt the capacity of existing forms of sub-bachelor provision to generate further significant expansion. In 2000, the Government announced the introduction of a new two-year qualification - the Foundation Degree - which was to be the main vehicle for achieving a 50 per cent participation target set for higher education by the year 2010. Now, for the first time, a sub-bachelor qualification in the UK would be styled a 'degree'.

Unlike the DipHE in the 1970s, the Foundation Degree was intended to combine multiple purposes and serve many audiences. It would:

- 'be designed to be highly valued in the job market'
- 'be vocational' (delivering specialist knowledge underpinned by rigorous and broad based academic learning) with key skills 'developed through work experience and accredited'
- 'be of high quality, designed to appeal to a wide range of abilities including the most able, and drawing on and developing best practice'
- 'be developed through collaboration between universities, colleges and employers, including the leaders in their field'
- 'focus on identifying and developing the key skills and knowledge which graduates need in order to contribute their full potential to all sectors of the labour market, so meeting the needs of employers'
- 'be capable of being delivered on both a part-time and full-time basis, with flexible delivery to suit the needs of people of combining study with a job' (with credits for appropriate qualifications and experience)
- 'be a widely recognised qualification in its own right' but with 'guaranteed arrangements for articulation to honours degree courses' (with only one and a third extra years of study) and

- 'stimulate lifelong learning, including through clearly defined credit accumulation and transfer schemes' (DfEE, 2000).

Here was another effort by government to redress the historic 'skills deficit' at the intermediate levels of employment. By involving employers in its design and operation, by enabling students to apply their learning to specific workplace situations, and by ensuring smooth progression to the bachelor degree or higher level training, the Foundation Degree would raise the value of work-focused qualifications. In time, the new degree was expected to subsume many of the other qualifications at these levels, including the higher national awards whose numbers had 'begun to fall away'. Outside the prescribed list of courses were several hundred different types of award accounting for some 7,000 different titles. Some of these too might have been expected to come into the Foundation Degree framework.

That the Foundation Degree would function as both an exit and a transfer qualification was an acknowledgement by the central authorities of important changes in the role of national awards at the sub-bachelor levels. By the late 1990s, some 55 per cent of students completing the full-time HND in England went on to achieve an honours degree, yet 29 per cent had to start their bachelor course in year two and 50 per cent start in year one. Such arrangements were 'clearly inefficient and costly for the taxpayer and the student'. They were doubly unacceptable where sub-degree qualifications provided a route into higher education for those 'from a wide range of socio-economic backgrounds'.

Unlike the introduction of the DipHE, the Government made available funding to develop prototype Foundation Degrees and guarantee them additional funded places. In addition, it set aside funding for national promotional and external evaluation activities. Nevertheless, it was not clear at what qualification level the new degree would be aligned. With its post-Dearing remit to construct two interlinked frameworks for higher education qualifications (one for England, Wales and Northern Ireland, and one for Scotland), it was ultimately for QAA to determine the level of the award. From the outset, policy makers had struggled to make sense of the number and variety of existing qualifications at the sub-bachelor levels.

The arrival of the Foundation Degree added to the difficulty and perplexity of this task. In particular, it posed a radical challenge to the eight-tier framework of higher education qualifications proposed by the Dearing Committee, not least because the inquiry had rejected the whole idea of a two-year degree. A two-year associate degree had been among the recommendations put forward in the *Choosing to Change* report (HEQC, 1994), the outcome of a project commissioned in 1992 by two government departments, the CNAA and the Higher Education Quality Council. However, there was little enthusiasm for the proposal.

> Our enquiries found minimal support for the introduction of such a qualification. It is seen as devaluing the term 'degree' and thought likely to become a second class qualification which would not be credible with employers or overseas, especially in mainland Europe. There was, moreover, suspicion that it was a cost-driven proposal paving the way to a 'two-year entitlement', so that students would be persuaded that it was a normal endpoint for a majority of undergraduates. (NCIHE, 1997a: 147)

After two years of development and consultation, and soon after the announcement of the Foundation Degree, QAA published its position paper on the establishment of a six-level national qualifications framework for higher education in England, Wales and Northern Ireland (QAA, 2000). Like the framework proposed in the Dearing report, this had four levels of undergraduate education. Level HE4 was that of the bachelor degree with honours and, although not much used outside Scotland, HE3 was the level of the non-honours or ordinary bachelor degree. Depending on their final specification, 'the Foundation Degrees proposed for introduction in England might be at this level'. At HE2 were several qualifications 'generally regarded' as being at this level, including 'Higher National qualifications, and

Diplomas of Higher Education'. Similar to Scotland, the level of learning represented by HE1 was not exclusive to higher education. There was an overlap here with levels of learning attained in some further education provision and 'the achievement of good Advanced level students'.

In the event, QAA adopted a five-tier framework in 2001 (QAA, 2001a), with three undergraduate levels now described by a letter: H or Honours Level (bachelor degrees with honours); I or Intermediate Level (Foundation Degrees, ordinary bachelor degrees, DipHEs and other higher diplomas); and C or Certificate Level (CertHEs). These five levels were not tied to the National Qualifications Framework until 2004. In order to signal the character of the new Foundation Degree, QAA had published a draft benchmark statement for the qualification in 2002. In this statement, the distinctiveness of the Foundation Degree was to be found in its 'integration' of five characteristics: 'accessibility; articulation and progression; employer involvement; flexibility; and partnership'. While none of these attributes was unique to Foundation Degrees, 'their clear and planned integration within a single award underpinned by work-based learning makes the award highly distinctive' (QAA, 2002).

Based on the 'good start' made by the prototypes, the 2003 White Paper on higher education declared its support for a policy of funding Foundation Degrees in preference to traditional bachelor degrees so that future growth would come predominantly through this route. In this way, the new qualification was asked to 'break the traditional pattern of demand', 'catalyse a change in the pattern of provision', 'make Foundation Degrees the standard two-year higher education qualification', 'bring HNDs and HNCs into the foundation degree framework' and, most importantly, take the bulk of expansion necessary to meet the 50 per cent participation target (DfES, 2003b).

To support this effort, a national body was established - Foundation Degree Forward - acting as a centre for expertise and liaising with employers and professional bodies. The White Paper envisaged that this body might offer a dedicated validation service for Foundation Degrees so as to widen the choice for further education colleges and other institutions without degree awarding powers. This did not happen. Instead, the right to award Foundation Degrees was extended to further education colleges in England from 2008 and in Wales from 2010. Alongside development funding for institutions and employers to work together in designing more new Foundation Degrees, the White Paper also proposed that incentives be provided for their students in the form of bursaries. These were expected to be used for extra maintenance or to offset the near three-fold increase in the cap on undergraduate tuition fees announced in the same White Paper (and eventually introduced in England and Northern Ireland in 2006 and in Wales in 2007).

For the period up to 2010, a target was set of 100,000 entrants to Foundation Degrees. This level of growth was a recommendation to the Government from a task group on Foundation Degrees set up by ministers in 2003 (Foundation Degree Task Force, 2004). The target was effectively met one year early and without the need for bursaries. Having begun life as an award at the Intermediate or I Level of the FHEQ in England, Wales and Northern Ireland, the Foundation Degree was re-described as a Level 5 qualification (along with the DipHE and HND) in the second edition of the FHEQ published in 2008 (QAA, 2008). Now the ordinary degree joined the bachelor degree with honours at Level 6. The CertHE and HNC were located at Level 4, the same position as when they were styled a Level C qualification. With the revised framework came an amended Foundation Degree qualification benchmark, one of a set of 'reference points' within the QAA academic infrastructure (QAA, 2010).

4.8 Declining shares of sub-bachelor higher education

Although the target numbers for Foundation Degrees in England were achieved, the growth was insufficient to challenge the continuing and growing popular demand for the bachelor degree over this period. Nor was it sufficient to offset the reduction in student numbers for all the main sub-bachelor qualifications, except the DipHE.

Table 4.3: Students on courses of higher education at higher education institutions and further education colleges by level and type of qualification, England, 2000-01 and 2009-10 (Thousands)

	2000-01			2009-10			% Change in total
	HEIs	FECs	Total	HEIs	FECs	Total	
England							
Postgraduate	282.2	8.0	290.2	475.6	4.9	480.5	+66%
Bachelor	761.9	24.9	786.8	1159.1	25.0	1184.1	+50%
Sub-bachelor	421.2	154.6	575.7	361.6	147.3	508.9	-12%
Foundation Degree	*0.0*	*0.0*	*0.0*	*45.6*	*52.5*	*98.0*	*+100%*
HND	*34.4*	*39.6*	*63.9*	*7.5*	*10.5*	*18.0*	*-72%*
HNC	*5.6*	*43.1*	*48.7*	*3.3*	*13.8*	*17.1*	*-65%*
DipHE	*47.1*	*1.7*	*48.8*	*49.1*	*2.2*	*51.3*	*+5%*
CertHE	*15.7*	*0.6*	*16.3*	*7.2*	*4.0*	*11.2*	*-31%*
Other[1]	*328.4*	*69.6*	*398.0*	*248.9*	*64.3*	*313.2*	*-21%*
All levels	1465.3	187.3	1652.6	1996.3	177.3	2173.6	+31%

Source: Parry, Davies and Williams (2004); Parry, Callender, Scott and Temple (2012)

Notes:

1 Includes higher level qualifications and institutional credits.

In Table 4.3, the rates of increase and decrease for the main qualification levels and types are compared between 2000-01 (when the Foundation Degree was first announced) and 2009-10. The numbers are not strictly comparable because they were composed on different bases. Nevertheless, they highlight the rapid expansion of bachelor and postgraduate education and, by contrast, the contraction of undergraduate and higher level education at the sub-bachelor levels.

The collapse in the numbers studying for the HND and HNC was particularly pronounced over this period. This is probably only partly explained by the substitution effects of the new degree, by the introduction of variable tuition fees in 2006, or by the award of qualifications under licence by Pearson. In setting out the case for further expansion of Foundation Degrees in England, the Government intended that HND places would be increasingly replaced with Foundation Degrees. While there was 'still strong loyalty from employers in some sectors', the numbers applying for HND courses 'has been declining in recent years'. Furthermore: 'as Foundation Degrees became more widely understood and accepted, it will

be important that employers and students are not confused by competing brands' (DfES, 2003a).

When Foundation Degrees were first introduced, the then awarding body for higher national qualifications in England - Edexcel - expected that 20,000 HND places would be replaced in this way. With this prospect, it planned to offer its own BTEC Foundation Degrees validated by regional partner universities. These plans came to nothing. In 2003, Pearson acquired a majority stake in Edexcel, before taking over the remaining part in 2005. The BTEC title was retained by Pearson as a brand. Instead of joining the market for Foundation Degrees, Pearson invested in the two existing higher national qualifications: the BTEC HND and the BTEC HNC. If they wished, higher education institutions in the UK could provide and award these qualifications under a licence agreement with Pearson. As awarding bodies, higher education institutions were able to customise and devise their own programmes, although these needed to map to the core content of existing BTEC higher national programmes where in place.

Little remarked upon in official statements was the situation of the DipHE. Although for long a minor presence in higher education, the DipHE had become a specialist professional qualification serving occupations in health and allied services, especially nursing. The CertHE, on other hand, performed a wider range of functions, including as a non-vocational award in adult higher education. Unlike the HND and HNC which were offered in both the higher education and the further education sectors, the DipHE and CertHE were awards associated with higher education institutions.

In the case of higher level non-undergraduate qualifications, the policy was largely one of no policy. These awards were not eligible for support from the higher education funding bodies. For their part, the further education funding bodies had the power but not the obligation to fund such courses. A proportion of these of programmes were in receipt of public funding but many, especially those leading to professional qualifications, were funded through charges to the student (which in some cases might be met by the employer). Most such provision was located in the higher education sector.

Prior to 1999, the HNC was a non-prescribed qualification funded by the further education funding body. Following its inclusion on the prescribed list, there remained an estimated 60,000 students on higher level courses funded by the further education funding body in 2000-01 (Clark, 2002). Since then, whatever their funding, the numbers studying for higher level qualifications have reduced in both sectors. It was not until 2006 that, for the first time, the funding body for further education announced its own strategy for higher education (LSC, 2006). Only later was an attempt made by this body to understand the contribution of further education to higher level technical and professional qualifications, some of which it still funded (LSC, 2008).

In Scotland, where the HND and HNC were overseen and awarded by the Scottish Qualifications Authority and almost entirely taught in further education colleges, there was no adoption of the Foundation Degree by a post-devolution Scottish Government. New design rules had been approved by the SQA in 1998 but these were not finalised until 2003. By 2008, all revised Higher Nationals had been incorporated within the Scottish Credit and Qualifications Framework.

Table 4.4: Students on courses of higher education at higher education institutions and further education colleges by level and type of qualification, Scotland, 2000-01 and 2009-10 (Thousands)

	2000-01			2009-10			% Change in total
	HEIs	FECs	Total	HEIs	FECs	Total	
Scotland							
Postgraduate	36.3	0.5	36.8	54.8	0.1	54.9	+50%
Bachelor	111.9	2.3	114.3	145.5	0.6	146.2	+28%
Sub-bachelor	39.8	70.1	109.9	37.4	49.0	86.4	-21%
HND/HNC	*1.6*	*46.2*	*47.8*	*4.5*	*36.7*	*41.2*	*-14%*
Other[1]	*38.1*	*24.0*	*62.1*	*32.9*	*12.3*	*45.2*	*-27%*
All levels	188.0	72.9	260.9	237.8	49.8	287.6	+10%

Source: Scottish Government Lifelong Learning Statistics

Notes:

1 Includes higher level qualifications and institutional credits

Between 2000-01 and 2009-10, there was an approximately 12 per cent drop in the sub-bachelor population in England. In Scotland, the number of students studying at these levels decreased by 21 per cent (Table 4.4). For HNDs and HNCs, however, this fall was less steep than for the same set of qualifications in England. Larger in Scotland was the decrease in the other awards at the sub-bachelor levels. Among the college-based programmes in this category were professional development awards and those which led to one or more higher national units.

When examined over the longer period between the Dearing and Garrick inquiries and our base year of 2014-15 (Table 4.5), the decrease in the sub-bachelor population was largest in England (a 37 per cent decline) and smallest in Wales (a 11 per cent drop). In Scotland, the decrease was 18 per cent. Only in Northern Ireland was there an increase in numbers at the sub-bachelor levels. In the UK as a whole (including the Open University), the decline was close to one-third (31 per cent). At the bachelor and postgraduate levels, by contrast, high rates of growth were evident in each jurisdiction. England experienced a 50 per cent increase in bachelor students and a 53 per cent rise in postgraduate students, while in Wales the increase was 59 per cent and 46 per cent respectively. The level of expansion for bachelor education was somewhat lower in Scotland (34 per cent) as it was for postgraduate education in Northern Ireland (17 per cent).

Table 4.5: Students on courses of higher education (including the Open University) by level of study, mode of study and country, 1996-97 and 2014-15, United Kingdom (Thousands)

		1996-97			2014-15			
		Full-time	Part-time	Total	Full-time	Part-time	Total	% Change
	England							
	Postgraduate	114.6	170.8	285.4	252.0	184.0	437.0	+53%
	Bachelor	708.3	79.4	787.8	1108.0	77.4	1185.3	+50%
	Sub-bachelor	124.0	258.7	382.7	62.3	180.3	242.6	-37%
	All levels	947.0	509.0	1455.9	1422.2	442.7	1864.9	+28%
	Scotland							
	Postgraduate	14.9	22.9	37.9	33.4	22.3	55.7	+47%
	Bachelor	100.7	7.5	108.3	137.0	8.0	145.0	+34%
	Sub-bachelor	35.2	45.3	80.5	36.8	29.5	66.4	-18%
	All levels	150.9	75.8	226.7	207.3	59.8	267.1	+18%
	Wales							
	Postgraduate	7.0	10.5	17.5	15.5	12.3	27.8	+59%
	Bachelor	48.7	3.3	52.0	72.4	3.3	75.7	+46%
	Sub-bachelor	8.3	18.1	26.3	4.4	19.0	23.5	-11%
	All levels	64.0	31.9	95.8	92.3	34.6	127.0	+33%
	Northern Ireland							
	Postgraduate	3.2	6.4	9.6	4.8	6.4	11.2	+17%
	Bachelor	21.0	3.6	24.6	33.0	3.1	36.1	+47%
	Sub-bachelor	4.8	9.0	13.8	4.8	12.2	17.0	+23%
	All levels	29.0	19.0	48.0	42.7	21.7	64.4	+34%
	Open University							
	Postgraduate	0.5	13.2	13.7	0.2	9.3	9.5	-31%
	Bachelor	0.0	93.6	93.6	0.0	106.3	106.3	+14%
	Sub-bachelor	0.0	24.0	24.0	0.0	16.5	16.5	-31%
	All levels	0.5	130.8	131.3	0.2	132.1	132.3	+21%
	UK							
	Postgraduate	140.3	223.9	364.1	305.9	235.3	541.2	+49%

	Bachelor	878.7	187.5	1066.2	1350.4	198.1	1548.5	+45%
	Sub-Bachelor	172.2	355.1	527.3	108.4	257.6	366.0	-31%
	All levels	1191.2	766.4	1957.6	1764.7	691.0	2455.7	+25%

Source: HESA

The pattern of decrease in sub-bachelor education also altered the balance between part-time and full-time numbers. In 1996-97, part-time students studying at these levels in Scotland were in a majority. In 2014-15, they were a minority. Elsewhere, the direction of change was the other way round, with the proportion of part-time students increasing between these two dates. At the beginning of the period, just over two-thirds of the sub-bachelor population in the UK (including the Open University) studied on a part-time basis. At the end of the period this had risen to 70 per cent.

In all four countries, the share taken by sub-bachelor higher education was thereby reduced. In England, the proportion went down from 26 to 13 per cent, a difference of 13 percentage points. In Scotland, it decreased by 11 percentage points, from 36 to 25 per cent. Where before Scotland commanded the biggest share of sub-bachelor higher education, that distinction now went to Northern Ireland where the proportion declined by only three percentage points, from 29 to 26 per cent. In Wales, the share decreased from 27 to 19 per cent. For the whole of the UK, the decline was in the region of 12 percentage points, from 27 per cent in 1996-97 to 15 per cent in 2014-15.

4.9 Austerity, market reforms and higher level apprenticeships

Retrenchment and student number controls, together with far-reaching market and regulatory reforms in England, were the changed context for public and private higher education in the years following the 2008 global financial crisis. Importantly, this included a report by the Independent Review of Higher Education Funding and Student Finance (the Browne Review, 2009-10) which proposed a decisive shift to a market system in England in which student fees (supported by government-subsidised loans) would replace public grants to institutions (Independent Review, 2010). In place of government interventions to promote differentiation, such as through Foundation Degrees, there would be more reliance on the market as a mechanism for setting fees, for improving quality, for stimulating innovation and for enabling students to exercise choice. In the Browne report, the diversity envisaged was within the ranks of higher education institutions, with little reference to other providers or the span of courses and qualifications.

The report recommended that there should be no limit on the fees charged and the numbers recruited by institutions but it also recognised that much better information was required for the market to work correctly. While there was no direct reference to higher education below the level of the bachelor degree, the proposal that part-time students should be able to benefit from the same loans for fees as full-time students had immediate implications for sub-bachelor higher education (where the great majority of students studied on a part-time basis).

Commissioned by the previous Labour Government, the review report was received by a Conservative-led Coalition Government in 2010. The influence of its recommendations was acknowledged in the 2011 White Paper *Higher Education: Students at the Heart of the System* (BIS, 2011) which proposed a new system for funding higher education in England, shifting public spending away from teaching grants and towards repayable student loans covering the full costs of tuition. For the first time, loans would be able to be accessed by many part-time and distance learning students. From 2012, the maximum tuition fee for

full-time undergraduate courses was increased nearly three-fold to £9,000 a year, with a basic threshold set at £6,000.

With funding following the student and competition replacing bureaucracy, there was the prospect of a more diverse, dynamic and responsive higher education system:

> Our reforms are designed to deliver a more responsive higher education sector in which funding follows the decisions of learners and successful institutions are freed to thrive; in which there is a new focus on the student experience and the quality of teaching and in which further education colleges and other alternative providers are encouraged to offer a diverse range of higher education provision. (BIS, 2011: 8)

This diversity extended to qualifications at the sub-bachelor levels - prescribed and non-prescribed - especially where provided by further education colleges and when studied by adult, part-time and non-traditional students:

> Colleges have displayed particular strengths in reaching out to non-traditional higher education learners including mature and part-time students. They also have a distinctive mission particularly in delivering locally-relevant, vocational higher-level skills such as HNCs, HNDs, Foundation Degrees and Apprenticeships.
>
> Further education colleges also offer professional qualifications and awards which are predominantly studied part-time by people over 25 in employment. This kind of learning is increasingly being offered on a very flexible basis, including distance and online learning. Students are often able to take a break from their courses, which helps them build their study around their working and family responsibilities. We recognise the importance of this type of higher education provision (sometimes called “non-prescribed”) and will consider how it relates to other forms of provision. (BIS, 2011: 46)

Different again were the models able to be offered by for-profit and not-for-profit private providers:

> Other alternative providers, including new entrants to the sector, may have different strengths. For example, they may offer particular well-honed teaching models that are especially efficient or cover niche areas. There are also around 60 overseas universities with bases in the UK offering their own degree or other award. A truly international higher education provider, with bases all over the world, may find it easier to include an international higher education experience for their students, as a standard part of their courses. (BIS, 2011: 46)

Over the next five years, a number of reform measures were introduced to recognise, promote and stimulate a diverse range of higher education provision, each with implications for the pattern and profile of sub-bachelor undergraduate programmes and higher level courses. First, steps were taken to improve and expand the information made available to prospective students about individual undergraduate courses, part-time as well as full-time and including those leading to all the major sub-bachelor qualifications. Since 2012, a key information set (now called the Unistats data set) on items including teaching, assessment, accreditation, costs and employment outcomes has been searchable on a course-by-course basis. Full data has not always been available where the number of students on programmes was small, a matter bearing on sub-bachelor and college-located courses in particular.

Second, attempts were made to expand the higher education provided by further education colleges in their own right. Based on a 'core and margin' model to free up student number controls, this involved two competitions. The first allowed unrestricted recruitment of high-

achieving students (those with high grades at A Level). The second allowed providers charging an average tuition fee below £7,500 to expand by competing for a share of some 20,000 students. Further education colleges were expected to benefit from this second competition, especially since they could win their own additional places (rather than those made available by franchise arrangements with partner universities).

More radically, plans were put in place to open up the market to new and 'alternative' providers through the creation of 'a level playing field' and a single regulatory framework for the whole higher education system. At this point, the term alternative provider was used to include private organisations and further education colleges. Both types of provider had experienced 'barriers to fair competition'. The rules controlling student numbers and degree awarding powers, it was argued, made it difficult for them to compete with universities for students. Indirect funding and validation arrangements were examples where the system treated colleges and universities 'very differently'. Indeed, following legislation in 2007, only two colleges had been granted Foundation Degree awarding powers by 2011.

Around the same time, a technical consultation was opened on the new regulatory framework for public and private providers, with the role of the funding body for higher education in England now recast as lead regulator and 'consumer champion'. The reform of the regulatory architecture was the subject of a second White Paper in 2016 and its proposals and implications for sub-bachelor higher education are considered in Section 6 of the report.

Concerns about the impact of spending cuts and fee reforms, especially on demand for full-time and part-time undergraduate education, prompted an analysis of the latest shifts and trends in the English system. This was undertaken by the funding body for higher education in England (HEFCE, 2014a) and included a detailed look at the decline in the number of entrants to sub-bachelor undergraduate courses at publicly funded providers (HEFCE, 2014c). Between 2010-11 and 2012-13, the number of full-time undergraduate entrants fell by 33,000, but two-thirds of the overall decrease was at the sub-bachelor levels. Whereas this represented only a three per cent reduction in the number of entrants to bachelor courses, this was a 33 per cent reduction in the numbers entering sub-bachelor undergraduate education.

More stark was the decrease in part-time undergraduate entrants where overall numbers had been in decline since 2008-09. Between that date and 2012-13, the number of entrants decreased by 134,000. In this case, 94 per cent of the total decline was concentrated in the sub-bachelor segment (where numbers fell by more than one-half compared to a 13 per cent fall observed for part-time bachelor entrants).

In short, every type and every mode of sub-bachelor higher education in England had declined since 2009-10. In particular, there was a large fall in entry to full-time and part-time Foundation Degrees. For the HND and HNC in higher education institutions the pattern was one of 'prolonged and persistent' decline in both modes, with a continued erosion of higher national provision after 2009-10.

> The introduction of foundation degrees appears to have accelerated the decline in HNDs as many were converted into foundation degrees. This finding may suggest that HEIs were accessing new markets during this period. (HEFCE, 2014c: 8)

In 2009-10, 45 per cent of Foundation Degree qualifiers in higher education institutions and 61 per cent of HND qualifiers in these establishments progressed to a bachelor degree in the same institution. For further education colleges, the figures were 31 per cent and 10 per cent on a much lower base.

> There was therefore some scope for institutions to enrol foundation degree and HND students directly onto first degree courses, employing foundation degrees or HNDs as exit routes where necessary. This would be a rational response to the existence of student number controls; and its effect would be to lower numbers of entrants to foundation degrees. (HEFCE, 2014c: 8)

Given the general pattern of decline in sub-bachelor undergraduate education, no one explanation was likely to account for 'the turning point in 2009'.

> It is very unlikely that a single policy change (or change in reporting practice) is responsible. Instead, the evidence points to a series of factors coming together to affect such courses among students, or institutions, or both. Higher education institutions appear to be exiting the market for study below degree level and focusing their undergraduate provision around degree courses (HEFCE, 2014b: 6)

Following the introduction of the new fee regime in 2012, the median tuition fee for entrants to full-time bachelor degrees registered and taught at higher education institutions was around £8,500. Fees were lower for those beginning equivalent full-time undergraduate courses at further education colleges, whether these were franchised or college-owned programmes.

Fees for part-time undergraduate study had risen before 2012, partly to replace the decline in funding occasioned by the policy of equivalent and lower qualifications (ELQ). Introduced in 2008, the ELQ policy reduced public funding for students aiming for a qualification equivalent or lower to one they already held. This applied to both full-time and part-time programmes, although there were some exemptions, such as Foundation Degrees. From 2008 to 2012, there was a 57 per cent drop in the number of part-time entrants studying for an ELQ at English higher education institutions compared with a 36 per cent drop in the number of part-time entrants not studying for an ELQ.

Fees for part-time study were also increased to offset reductions in direct funding following the fee reform in 2012. Despite these recent rises, part-time fees still tended to be lower for part-time bachelor and Foundation Degree students registered and taught at higher education institutions. For these students, the median full-time equivalent fee was £5,000. For those taught and registered at further education colleges, it was £4,000 for Foundation Degrees.

This was also a time when the number of entrants with direct financial backing from their employers fell for the part-time undergraduate population, by almost half in 2012-13 compared with the previous year. Declines in entry to part-time undergraduate education appear to have been affected also by a range of macroeconomic factors including falls in employment, particularly in the public sector. In combination, these factors meant that some prospective students were now 'less likely to be able to afford increased fees' and that some institutions were 'also likely to have restructured some of their provision to meet changes in both the full-time and part-time markets' (HEFCE, 2014b). Given these conditions:

> It is hard to think of a single causal factor that affects all equally. This points to a general turn in sentiment against OUG [other undergraduate education] - either on the supply side or the demand side, or both - rather than a single predominant cause. (HEFCE, 2014c: 11)

In 2015, the 'artificial cap' on student numbers was removed altogether for publicly funded institutions to 'allow greater choice and to help competition' (BIS, 2016b). Student number controls had been introduced for alternative providers in 2014. From 2012, students on approved undergraduate courses at these providers could apply for a fee loan up to a maximum of £6,000 for full-time programmes and £4,500 for part-time programmes. The

highest growth in students receiving this support had been for courses leading to the HND and HNC. Most of this expansion was concentrated in a small number of alternative providers with approved courses (17 out of 140 providers accounted for 75 per cent of the total growth). In 2013, action was taken to limit further expansion. Twenty-three of the fastest growing providers were instructed to stop recruiting to full-time courses. In 2014, the National Audit Office raised specific concerns relating to the financial support provided to students attending some of these programmes (NAO, 2014).

Those in receipt of public funding were a small proportion of the total number of students at alternative providers. A government-commissioned survey in 2012 identified a minimum of 674 privately funded providers operating in the UK (Hughes et al, 2013). A second survey in 2014 identified some 732 alternative providers and estimated they served somewhere between 245,000 and 295,000 students. Information on the qualification levels of courses was only indicated for a minority of these providers (Shury et al, 2016). In 2014-15, there were 50,000 undergraduate students in receipt of public funds at alternative providers in England. The majority (52 per cent) were studying for sub-bachelor qualifications. The HND (and a small HNC fraction) accounted for the greater part (93 per cent or 23,000 enrolments) of the sub-bachelor population (HESA, 2016).

As England was the principal location for a new higher education qualification (the Foundation Degree) and the subsequent focus of a new fee regime applied to private and public providers, the impact of these reforms was reviewed on many fronts (HEFCE, 2010; 2013; QAA, 2016a; 2016b). The policy directions taken in Scotland, Wales and Northern Ireland were different. Their own reforms had implications for sub-bachelor higher education and higher level qualifications but not of the scale, sweep and intensity of the interventions and experiments in England. One exception was the drive for higher level apprenticeships, although this was more recent than in England and had yet to register a significant influence on the landscape of higher and further education.

Following a major decline in apprenticeships from their high point in the 1960s, a new class of Modern Apprenticeships was launched in the 1990s. By the end of 1998 almost a quarter of a million people in England and Wales had commenced these programmes. Nearly all these were at NQF Levels 2 and 3. In 2004, significant changes were made to the Modern Apprenticeship scheme, including the addition of Advanced Apprenticeships at Level 3 and above. In England, the term Higher Apprenticeship was first used to refer to the small numbers starting apprenticeships above Level 3 in 2008.

In line with the recommendations of the Leitch Review of Skills (Leitch Review, 2006), the New Labour Government had a target of one in five young people undertaking an apprenticeship by the year 2020. To support this ambition, a National Apprenticeship Service was set up in 2009. The Leitch targets were abolished by the incoming Coalition Government. A Higher Apprenticeship Fund was created in 2011 to bring 20,000 people into apprenticeships at these levels and, from 2013, funding was made available for a further 20,000 higher level apprentices. In 2015, a commitment was made by the Government to have three million people in apprenticeships by the year 2020. Also at this time in England, a second category of higher level apprenticeship was announced, the Degree Apprenticeship. Somewhat confusingly, the Higher Apprenticeship spanned Levels 4 to 7 while the Degree Apprenticeship was at Levels 6 and 7. Alongside the two higher level apprenticeship programmes were Advanced Apprenticeships at Level 3 and Intermediate Apprenticeships at Level 2.

Up to 2017, there were two different funding models in operation, with the 'standards' version gradually replacing the 'frameworks' model. As a result of the apprenticeship levy introduced in 2017, another system of funding was brought into play. Employers with annual payroll costs of over £3 million were required to pay a 0.5 per cent surcharge which they

could reclaim, plus a 10 per cent government top-up, to fund their apprenticeship training. For employers not paying the levy, 90 per cent of the training costs of apprentices were met by the government and the remaining 10 per cent was paid by the employer. The administration of the funding raised with the levy is the responsibility of an independent employer-led body, the Institute for Apprenticeships (IfA). The same body has responsibility for regulating the quality of apprenticeships and maintaining a register of apprenticeship training providers. It was established by the Enterprise Act 2016 and came into operation in 2017.

Skills policy, like that for higher education, is a devolved responsibility. The apprenticeship levy, on the other hand, is UK-wide. In Scotland, the levy was to be used to support a number of measures, including a major planned growth in new Modern Apprenticeships and an increase in the number of Graduate Level Apprenticeships (GLAs). The GLAs began in 2016 and provided a range of entry and exit points from the HND (at SCQF Level 8) to the master's degree (at SCQF Level 11). Prior to 2016, Technical Apprenticeships had been developed at SCQF Levels 8 and 9 and Professional Apprenticeships at SCQF Levels 10 and above. Skills Development Scotland is responsible for the funding of apprenticeship training. In Wales, Higher Apprenticeships operate at Level 4 and above. They were introduced in 2011 and replaced the Modern Skills Diploma programme. In Northern Ireland, a new apprenticeship system has been under development since 2014, including Higher Level Apprenticeships (HLAs) at Levels 4 to 8. At present, HLAs are being piloted at Levels 4, 5 and 6.

At present, most higher level apprenticeships are at the sub-bachelor levels. It is at these levels, especially in England, that the respective roles and responsibilities of quality bodies have taken time to be agreed. In part, this is because of the division between prescribed (undergraduate) and non-prescribed higher education at Levels 4 and 5. By contrast, all the elements of apprenticeships at Levels 6 and 7 are regulated by the higher education funding body and, unlike for Higher Apprenticeships, a QAA Characteristics Statement on Degree Apprenticeships is under development, with an interim statement already published.

Although there were up to 30,000 apprentices working and studying at the sub-bachelor levels by 2014-15, it was not until 2017 that a quality settlement was achieved between Ofsted and HEFCE in respect of Higher Apprenticeships. The settlement is that Ofqual will be responsible for inspecting the quality of apprenticeship training at Levels 4 and 5, unless a prescribed higher education qualification is contained in the training standard. In the case of apprenticeship providers offering prescribed higher education as part of an apprenticeship standard, Ofsted and the higher education funding body will reach a judgement informed by joint working. In reaching a judgement, Ofsted will inspect the employer-based provision and the funding body will use information from its process of annual provider review.

Relationships between higher education, further education and the apprenticeship system are in flux as policymakers seek to adapt the machinery of government to manage the cross-sector collaborations that flow from these reforms. In Section 6, we examine the reform proposals for tertiary education and training in each country, highlighting their importance for the future of sub-bachelor higher education.

5 What qualification types, what country profiles?

Prior to the 1980s, 'non-degree' and 'sub-degree' awards were rarely brought together or treated as a whole. Nor were they regarded as a collection of qualifications with features, purposes or standards in common. With the rise of national qualifications frameworks, there was a need to associate or assign these awards to a level on one or other, or both, of two frameworks: one for higher education qualifications and one for qualifications across a wider span of education and training.

For the authorities in England, working with their counterparts in Wales and Northern Ireland, this was a protracted and uneven process, especially in aligning the levels on each framework. The variety of types of qualifications at the sub-bachelor levels made this task less than straightforward. Nor were things made easier by the arrival of the Foundation Degree. The settlement that was eventually achieved has sub-bachelor qualifications at two framework levels, above that for upper secondary education and below that for the bachelor degree. On the FHEQ, these are termed undergraduate levels. On the NQF, QCF and successor frameworks in England, Wales and Northern Ireland, they are simply generic levels.

North of the border, where the Scottish Credit and Accumulation Scheme already served as a vehicle to relate courses and qualifications of various types and levels, the Framework for Qualifications of Higher Education Institutions in Scotland (FQHEIS) was developed as part of the wider Scottish Credit and Qualifications Framework. As in the rest of the UK, sub-bachelor qualifications in Scotland are identified at two levels but, unlike elsewhere, the FQHEIS is incorporated into the SCQF and the qualifications of higher education institutions are positioned within SCQF levels. Within the SCQF, the HNC and HND are awards of the Scottish Qualifications Authority and, at the same two levels, the DipHE and CertHE are qualifications of the higher education institutions. The settlement in Scotland has sub-bachelor qualifications located below that for the ordinary bachelor degree and above the level of the Higher. As a consequence, the HNC and the CertHE are at the same level as the Advanced Higher which is an upper secondary qualification.

In this section, we review the profile of sub-qualifications and students for the UK as a whole and then for each country. The patterns and distinctive features of sub-bachelor provision are highlighted for England, Scotland, Wales and Northern Ireland. For sub-bachelor and bachelor students in the UK, we compare their domicile, age and gender, along with their subjects of study and the proportion of their numbers from the ethnic minority population. Our tables on the characteristics of the two student populations are for higher education institutions. The picture for further education colleges is drawn from secondary and supplementary sources. For the profile of sub-bachelor students on designated courses we draw on the new data collection on alternative providers in England. For those undertaking Higher Apprenticeships in England we report on their age, gender and ethnicity from published official sources.

5.1 Main types of sub-bachelor qualification in the UK

Across the UK as a whole, the youngest sub-bachelor qualification - the Foundation Degree - is the largest single type of award. This is despite the qualification not being routinely adopted in Scotland. Around one in five students are studying for this qualification. Just over half of these students are taught in further education colleges. Those registered at higher education institutions and taught in the further education colleges account for more than a third (37 per cent) of the sub-bachelor students in the college sector.

Table 5.1: Higher education students on sub-bachelor courses taught at higher education institutions (including the Open University) and further education colleges by type of qualification, United Kingdom, 2014-15 (Thousands)

	Registered & taught at HEIs	Registered at HEIs & taught at FECs	Registered & taught at FECs[1,2]	Total	% Share
UK					
Foundation Degree	31.9	16.2	27.2	75.3	21%
HND	5.5	2.7	29.9	38.1	11%
HNC	7.0	2.9	28.4	38.3	11%
DipHE	8.8	0.1	0.2	9.2	3%
CertHE	14.6	0.5	0.0	15.1	4%
Professional qualifications	19.0	1.6	2.6	23.2	6%
NVQs or SVQs	0.4	0.0	0.9	1.3	0%
Other diplomas and certificates	21.1	2.0	28.0	51.1	14%
Undergraduate credits	69.5	0.7	0.0	70.1	19%
QCF or HN units	0.0	0.0	5.8	5.9	2%
Other[3]	9.8	0.6	22.7	33.1	9%
All types	187.5	27.4	145.5	360.4	100%

Source: HESA, Individualised Learner Record, Scottish Funding Council, Lifelong Learning Wales Record and Consolidated Data Return

Notes:

1 Includes a small number of apprentices on pilot programmes of Higher Level Apprenticeships in Northern Ireland.
2 Includes a small number of students in further education colleges in England counted on more than one programme.
3 Includes all Level 4 and 5 students registered and taught in further education colleges in Northern Ireland.

The second largest single qualifications - the HND and the HNC - are the oldest, dating from the 1920s. In 2014-15, each attracted 11 per cent of the sub-bachelor population. Both qualifications were taught mostly in further education colleges: 76 per cent of HND students and 74 per cent of HNC students. In neither case were franchise students a significant proportion: 8 per cent of HND students and 9 per cent of HNC students.

By contrast, the DipHE and the CertHE were qualifications nearly always taught in higher education institutions. However, by this time, they only accounted for small numbers and proportions of sub-bachelor higher education: three per cent of the total in the case of the DipHE and four per cent of the total in respect of the CertHE. This was mainly due to the

move to all-graduate entry in nursing. Although bachelor degrees in nursing were already offered in England, Scotland, Wales and Northern Ireland, the new graduate standards for nurse education developed by the Nursing and Midwifery Council were introduced across the UK from 2013.

Much larger numbers were awarded undergraduate credits or who undertook non-undergraduate qualifications. Only higher education institutions with degree awarding powers can award undergraduate credits, including for their franchise provision. In 2014-15, some 70,000 students were awarded institutional credit. This accounted for 19 per cent of the sub-bachelor population. Wright and Ellis (2000) excluded these awards from its investigation because they did not lead to a full qualification. We have included them in this report, not just on account of the relatively large numbers involved but for reasons of comprehensiveness and because of the variety of purposes and students likely to be served by the award of credits at the sub-bachelor levels. Furthermore, a significant number of these students are awarded credits by the Open University where the mode of study is part-time and by distance education.

The other part-awards at the sub-bachelor levels are HN units awarded by the Scottish Qualifications Authority or, outside Scotland, units associated with awards on the former Qualifications and Credit Framework. In both cases, the numbers are small. They are smaller again for those deemed to be undertaking competence-based qualifications at these levels, either National Vocational Qualifications or Scottish Vocational Qualifications.

The remaining groups of sub-bachelor qualifications - professional qualifications, other diplomas and certificates, and 'other' - represent the non-prescribed category of awards. Most are awarded by recognised awarding organisations, including bodies responsible for general and vocational qualifications as well as individual professional bodies and occupational organisations. In the main, they qualify people for entry or advancement in specific occupations. Some of these programmes prepare individuals for professional examinations. Those described here as professional qualifications have award titles that make clear their role in professional recognition or accreditation. Those in the category of other diplomas and certificates are probably similar types of qualification but where the award titles are less specific. The courses and qualifications in the category of 'other' reflect an assortment of awards. They also include all the numbers for sub-bachelor qualifications taught in further education colleges in Northern Ireland (since these were unavailable for individual types of award).

Given the overlap between these three groups of non-prescribed awards, it is sensible to describe them all as higher level professional, vocational and occupational qualifications. Taken together, they accounted for 107,000 students or around 30 per cent of the sub-bachelor population in 2014-15. One half (50 per cent) were taught in the further education sector. Franchising was a minor part of non-prescribed sub-bachelor higher education, with only seven per cent of students registered at higher education establishments but taught in colleges.

Table 5.2 Higher education students on sub-bachelor courses leading to undergraduate and higher level qualifications at higher education institutions (including the Open University) and further education colleges by type of qualification and mode of study, United Kingdom, 2014-15 (Thousands)

	Full-time	Part-time	Total	% Share
UK				
Sub-bachelor undergraduate[1]				
Foundation Degree	48.6	26.6	75.2	
HND	33.5	4.5	38.0	
HNC	16.7	21.6	38.3	
DipHE	3.7	5.4	9.1	
CertEd	2.2	12.8	15.0	
All	104.7	70.9	175.6	(49%)
Sub-bachelor higher level				
Professional qualifications	3.4	19.8	23.2	
NVQs or SVQs	0.0	1.3	1.3	
Other diplomas and certificates	8.2	42.3	50.5	
Other[2,3]	8.2	25.6	33.8	
All	19.8	89.0	108.8	(30%)
Undergraduate credits	2.6	67.5	70.1	(20%)
QCF or HN units	1.8	4.1	5.9	(1%)
All types	128.9	231.7	360.4	(100%)

Source: HESA, Individualised Learner Record, Scottish Funding Council, Lifelong Learning Wales Record and Consolidated Data Return

Notes:

1 Includes a small number of students in further education colleges in England counted on more than one programme.

2 Includes a small number of apprentices on pilot programmes of Higher Level Apprenticeships in Northern Ireland.

3 Includes all Level 4 and 5 students registered and taught in further education colleges in Northern Ireland.

The great majority of students pursuing non-prescribed or higher level qualifications - some 82 per cent - studied on a part-time basis (Table 5.2). By contrast, the courses leading to prescribed or undergraduate sub-bachelor qualifications were mostly undertaken on a full-time basis. Of the 176,000 enrolled on these programmes, 60 per cent were defined as full-time students. Here, once again, it is necessary to repeat the caution about the use and interpretation of these definitions, especially where courses involve study and learning in the workplace. Nevertheless, these and other differences between the patterns of undergraduate and prescribed sub-bachelor higher education are important to highlight, particularly in light of past, present and future policies directed at, or with an influence on, provision at such levels.

The Foundation Degree and the HND, which together accounted for close to two-thirds of the undergraduate sub-bachelor population, were studied predominantly on a full-time basis. Full-time students were 65 per cent of those enrolled on programmes leading to the Foundation Degree and 88 per cent of those undertaking the HND. On the HNC and the DipHE, part-time students were in the majority, at 56 and 59 per cent respectively. These were not large majorities. The CertEd was the only undergraduate qualification type with a large majority (85 per cent).

If undergraduate credits and the small numbers of QCF and HN units are excluded, then 56 per cent of sub-bachelor higher education in 2014-15 was undertaken on a part-time basis. When included, the part-time proportion was increased by eight percentage points to 64 per cent.

5.2 Sector locations of sub-bachelor higher education in the UK countries

A distinctive feature of UK higher education below the level of the bachelor degree is where its programmes are taught. In all UK countries, sub-bachelor courses are provided by institutions in the higher education sector and by colleges in the further education sector. Although students might be registered at higher education establishments, some are taught (usually in whole but occasionally in part) at further education colleges. These arise from franchise and collaborative agreements made between individual universities and colleges. In these relationships, the higher education institution has formal responsibility for all aspects of the quality of programmes taught in the further education college, including the student experience.

In franchise partnerships, higher education qualifications are awarded by one or more partner higher education establishment, usually universities. Outside of franchise relationships, these qualifications are awarded by one or more validating universities, except for the HND and HND which in Scotland are awarded by the SQA and which, outside Scotland, are qualifications owned and awarded by Pearson. At present, only one further education college has taught-degree awarding powers and only a handful of colleges have the power to award the Foundation Degree. Therefore, nearly all the sub-bachelor undergraduate programmes offered by further education colleges are awarded by higher education institutions or by Pearson or by the SQA. Non-prescribed qualifications are awarded by a variety of recognised awarding organisations.

Table 5.3: Higher education students on sub-bachelor courses taught at higher education institutions (including the Open University) and further education colleges by country, United Kingdom, 2014-15 (Thousands)

	Registered & taught at HEIs	Registered at HEIs & taught at FECs	Registered & taught at FECs[1,2]	Total	% Share
England	134.0	22.2	87.5	243.7	67%
Scotland	23.0	1.7	45.9	70.6	20%
Wales	23.8	3.5	1.2	28.5	8%
Northern Ireland	6.7	0.0	10.9	17.6	5%
UK	187.5	27.4	145.5	360.4	100%

Source: HESA, Individualised Learner Record, Scottish Funding Council, Lifelong Learning Wales Record and Consolidated Data Return

Notes:

1 Includes a small number of students in further education colleges in England counted on more than one programme.
2 Includes a small number of apprentices on pilot programmes of Higher Level Apprenticeships in Northern Ireland.

The combinations of university-taught and college-located sub-bachelor higher education, together with their franchised components, are different in the four UK countries (Table 5.3). In 2014-15, England accounted for two-thirds of all the sub-bachelor students taught in the publicly funded sectors of higher education and further education in the UK. The share of the numbers registered and taught by higher education institutions in England was greater but not by a large margin. The franchise proportion of its college-taught students was the biggest by far among the four nations. Scotland accounted for two-fifths of the total sub-bachelor student population in the UK, most of them taught in the further education sector; very few were franchise students. In Wales, it was the higher education institutions which were the main providers. Of those taught in the colleges, most were on franchise programmes. In Northern Ireland, the majority of sub-bachelor students were found in the further education sector. None of the courses in this sector were provided through franchise arrangements.

5.3 Main types and locations sub-bachelor qualifications in England

Given the scale of sub-bachelor higher education in England, its profile was broadly similar to that for the UK as a whole (Tables 5.4 and 5.5). In 2014-15, two-thirds of the 244,000 students pursuing qualifications, credits and units at these levels were in engaged in part-time study. More than one-half (55 per cent) of the sub-bachelor population were taught in the higher education sector. Of those taught in the further education sector, a quarter were franchise students. Those registered on sub-bachelor courses in higher education institutions were a largely part-time population (74 per cent) whereas full-time students were a small majority of those registered at further education colleges (54).

Table 5.4: Higher education students on sub-bachelor courses taught at higher education institutions (including the Open University) and further education colleges by type of qualification, England, 2014-15 (Thousands)

		Registered & taught at HEIs	Registered at HEIs & taught at FECs	Registered & taught at FECs[1]	Total	% Share
England						
	Foundation Degree	27.6	14.6	26.9	69.1	28%
	HND	2.5	1.2	10.8	14.5	6%
	HNC	2.8	2.1	12.7	17.6	7%
	DipHE	6.9	0.1	0.2	7.2	3%
	CertHE	8.9	0.5	0.0	9.3	4%
	Professional qualifications	17.3	1.4	1.9	20.6	8%
	NVQs	0.3	0.0	0.0	0.3	0%
	Other diplomas and certificates	15.0	1.1	22.8	38.9	16%
	Undergraduate credits	48.0	0.6	0.0	48.5	20%
	QCF units	0.0	0.0	0.5	0.5	0%
	Other	4.7	0.6	11.8	17.1	7%
	All types	134.0	22.2	87.5	243.7	100%

Source: HESA and Individualised Learner Record

Notes:

1 Includes a small number of students counted on more than one programme.

Table 5.5: Higher education students registered on sub-bachelor courses at higher education institutions (including the Open University) and further education colleges by type of qualification and mode of study, England, 2014-15 (Thousands)

	Higher education institutions			Further education colleges[1]			All institutions		
	Full-time	Part-time	Total	Full-time	Part-time	Total	Full-time	Part-time	Total
England									
Foundation Degree	24.0	18.2	42.2	21.4	5.5	26.9	45.4	23.6	69.0
HND	2.8	0.9	3.7	9.1	1.6	10.7	12.0	2.5	14.5
HNC	1.0	3.9	4.9	2.8	9.9	12.7	3.8	13.7	17.5
DipHE	3.0	4.0	7.0	0.1	0.1	0.2	3.1	4.1	7.2
CertHE	1.5	7.8	9.3	0.0	0.0	0.0	1.5	7.8	9.3
Professional qualifications	3.0	15.8	18.8	0.3	1.6	1.9	3.2	17.4	20.6
NVQs	0.0	0.3	0.3	0.0	0.0	0.0	0.0	0.3	0.3
Other diplomas & certificates	2.7	13.4	16.1	4.6	18.2	22.8	7.3	31.6	38.9
Undergraduate credits	1.9	46.6	48.5	0.0	0.0	0.0	1.9	46.6	48.5
QCF units	0.0	0.0	0.0	0.1	0.5	0.6	0.1	0.5	0.6
Other	1.1	4.3	5.4	2.0	9.7	11.7	3.1	14.1	17.2
All types	41.0	115.2	156.2	40.4	47.1	87.5	81.4	162.4	243.7

Source: HESA and Individualised Learner Record

Notes:

1 Includes a small number of students enrolled on more than one programme.

Around 118,000 students were studying for the Foundation Degree, HND, HNC, DipHE and CertHE. The Foundation Degree and especially the HND were mostly full-time programmes. The HNC and the CertHE were mostly studied on a part-time basis. In the case of the DipHE, a smaller majority were part-time students. Taken together, 56 per cent of students on courses leading to undergraduate qualifications were studying full-time. However, the addition to the undergraduate total of those studying for institutional credit made this a population with a part-time majority, at 59 per cent. The 166,000 students on sub-bachelor courses leading to undergraduate qualifications and credits accounted for over two-thirds (68 per cent) of the higher education at these levels. Around 42 per cent of these students were taught in the further education sector. Of these, 27 per cent were franchised students.

The other 77,000 sub-bachelor students, one-third of the total, were enrolled on programmes leading to non-prescribed qualifications and QCF units. All five groups of higher level qualifications and units - professional qualifications, NVQs, other diplomas and

certificates, QCF units and 'other' - had part-time majorities. A large majority (82 per cent) of the non-prescribed population studied on a part-time basis. Over a half (52 per cent) were taught in further education colleges. Just seven per cent of these were franchise students. The share of sub-bachelor higher education taken by non-prescribed courses in England was the largest among the four UK countries. It was also the most heterogeneous, with qualifications linked to a wide range of professional, technical and specialist occupations.

The 134,000 sub-bachelor students taught in the higher education sector were spread across most of its 161 publicly funded institutions. The 110,000 students on sub-bachelor programmes in the further education sector were offered in more than 200 colleges.
In 2009-10, courses of higher education were taught in 283 further education colleges in England, although not all these were necessarily at the sub-bachelor levels (Parry et al, 2012). The majority were general further education colleges. Some were specialist colleges and a few were sixth-form colleges. Mainly as a result of mergers, the number of further education colleges with higher education courses had reduced to 253 by 2012-13 (Saraswat, 2014).

5.4 Main types and locations of sub-bachelor qualifications in Scotland

The profile in Scotland was different (Tables 5.6 and 5.7). First, over one half (52 per cent) of its 71,000 sub-bachelor students followed their courses on a part-time basis. Second, two out of three students on sub-bachelor programmes were taught in the further education sector. Third, most of the sub-bachelor population comprised full-time students (66 per cent) whereas those in the higher education sector were chiefly part-time students (78 per cent). Fourth, franchising was an insignificant element in college-taught provision (representing just four per cent of students). Fifth, two qualification types - the HND and the HNC - accounted for more than one half (58 per cent) of all sub-bachelor higher education. Both qualifications were taught almost entirely by further education colleges. Unlike elsewhere, the HNC in Scotland was usually studied on a full-time basis. Scotland did not follow England in adoption of the Foundation Degree, with just a tiny number enrolled in the higher education sector.

Table 5.6: Higher education students on sub-bachelor courses taught at higher education institutions (including the Open University) and further education colleges by type of qualification and location of study, Scotland, 2014-15 (Thousands)

	Registered & taught at HEIs	Registered at HEIs & taught at FECs	Registered & taught at FECs	Total	% Share
Scotland					
Foundation Degree	0.1	0.0	0.0	0.1	0%
HND	1.9	0.9	19.0	21.8	31%
HNC	3.1	0.3	15.6	19.0	27%
DipHE	1.3	0.0	0.0	1.3	2%
CertHE	1.2	0.0	0.0	1.2	2%
Professional qualifications	0.3	0.0	0.6	0.9	1%
SVQs	0.0	0.0	0.9	0.9	1%
Other diplomas and certificates	1.1	0.4	4.6	6.1	9%
Undergraduate credits	11.3	0.0	0.0	11.3	16%
HN units	0.0	0.0	5.3	5.3	8%
Other	2.8	0.0	0.0	2.8	4%
All types	23.0	1.7	45.9	70.6	100%

Source: HESA and Scottish Funding Council

Table 5.7: Higher education students registered on sub-bachelor courses at higher education institutions (including the Open University) and further education colleges by type of qualification and mode of study, Scotland, 2014-15 (Thousands)

		Higher education institutions			Further education colleges			All institutions		
		Full-time	Part-time	Total	Full-time	Part-time	Total	Full-time	Part-time	Total
Scotland										
	Foundation degree	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.1	0.1
	HND	1.2	0.6	1.8	18.9	1.0	19.9	20.1	1.6	21.8
	HNC	2.2	0.9	3.1	10.7	5.2	15.9	12.9	6.1	19.0
	DipHE	0.4	0.9	1.3	0.0	0.0	0.0	0.4	0.9	1.3
	CertHE	0.4	0.8	1.2	0.0	0.0	0.0	0.4	0.8	1.2
	Professional qualifications	0.1	0.2	0.3	0.0	0.6	0.6	0.1	0.8	0.9

	SVQs or NVQs	0.0	0.0	0.0	0.0	0.9	0.9	0.0	0.9	0.9
	Other diplomas & certificates	0.1	1.0	1.1	0.3	4.7	5.0	0.4	5.7	6.1
	Undergraduate credits	0.5	10.8	11.3	0.0	0.0	0.0	0.5	10.8	11.3
	HN units	0.0	0.0	0.0	1.7	3.6	5.3	1.7	3.6	5.4
	Other	0.1	2.6	2.8	0.0	0.0	0.0	0.1	2.6	2.7
	All types	5.2	17.9	23.0	31.6	16.0	47.6	36.7	33.9	70.6

Source: HESA and Scottish Funding Council

A less noticed feature of Scottish distinctiveness was the balance in its sub-bachelor higher education between undergraduate-type and higher level provision. Scotland was on its own in having a very large part (80 per cent) devoted to HNs and undergraduate qualifications, even when undergraduate credits and HN units were excluded. Only one in five sub-bachelor students were undertaking higher level professional, vocational and occupational qualifications.

In 2014-15, some 48,000 students were studying for sub-bachelor qualifications at 16 further education colleges in Scotland. As a result of mergers, many of these colleges were regional and multi-campus institutions. Ten years earlier, there had been 38 colleges in the Scottish further education sector and most of these had provided HN courses and units. The other 23,000 sub-bachelor students were distributed among the 18 higher education institutions in Scotland, along with the Open University.

In contrast to England, statistical information and time series data on higher education students and courses in further education colleges in Scotland is reported and published alongside that for higher education institutions. This administrative data has afforded a clear and comprehensive picture of sub-bachelor higher education across both sectors of Scottish tertiary education.

5.5 Main types and locations of sub-bachelor qualifications in Wales

In Wales, where the sub-bachelor population was mostly in the higher education sector and where that taught in the further education sector was mainly franchised, there were no qualification types in which the colleges were the main providers (Tables 5.8 and 5.9). One feature of this profile was that the CertHE was the largest award in the undergraduate category of sub-bachelor qualifications. Unlike in England and Scotland, the Foundation Degree, HND and HNC were mainly taught in the higher education sector.

Table 5.8: Higher education students on sub-bachelor courses taught at higher education institutions (including the Open University) and further education colleges by type of qualification and location of study, Wales, 2014-15 (Thousands)

	Registered & taught at HEIs	Registered at HEIs & taught at FECs	Registered & taught at FECs	Total	% Share
Wales					
Foundation Degree	3.8	1.6	0.3	5.7	20%
HND	1.1	0.6	0.1	1.8	6%
HNC	1.1	0.5	0.1	1.7	6%
DipHE	0.4	0.0	0.0	0.5	2%
CertHE	4.4	0.0	0.0	4.5	15%
Professional qualifications	0.9	0.2	0.1	1.2	4%
NVQs	0.1	0.0	0.0	0.1	0%
Other diplomas and certificates	1.5	0.5	0.6	2.6	9%
Undergraduate credits	8.9	0.1	0.0	9.0	32%
Other	1.6	0.0	0.0	1.6	6%
All types	23.8	3.5	1.2	28.5	100%

Source: HESA and Lifelong Learning Wales Record

Table 5.9: Higher education students registered on sub-bachelor courses at higher education institutions (including the Open University) and further education colleges by type of qualification and mode of study, Wales, 2014-15 (Thousands)

	Higher education institutions			Further education colleges			All institutions		
	Full-time	**Part-time**	**Total**	**Full-time**	**Part-time**	**Total**	**Full-time**	**Part-time**	**Total**
Wales									
Foundation Degree	3.0	2.4	5.4	0.0	0.3	0.3	3.0	2.7	5.7
HND	1.4	0.3	1.6	0.0	0.1	0.1	1.4	0.4	1.7
HNC	0.0	1.7	1.7	0.0	0.1	0.1	0.0	1.8	1.8
DipHE	0.1	0.3	0.5	0.0	0.0	0.0	0.1	0.3	0.5
CertHE	0.3	4.1	4.4	0.0	0.0	0.0	0.3	4.1	4.4

Professional qualifications	0.1	1.0	1.1	0.0	0.1	0.1	0.1	1.1	1.2
NVQs	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.1	0.1
Other diplomas & certificates	0.3	1.7	2.0	0.0	0.0	0.0	0.3	1.7	2.0
Undergraduate credits	0.1	8.8	8.9	0.0	0.0	0.0	0.1	8.8	8.9
Other	0.4	1.2	1.6	0.3	0.4	0.7	0.7	1.6	2.3
All types	5.7	21.6	27.3	0.3	1.0	1.2	6.0	22.6	28.5

Source: HESA and Lifelong Learning Wales Record

In 2014-15, all nine higher education institutions in Wales (including the Open University) had students enrolled at the sub-bachelor levels, amounting to around 24,000 enrolments in total. Another 5,000 or so were taught in 12 out of the 23 further education providers in Wales. Most of these were further education colleges.

Excluding undergraduate credits, 72 per cent of the sub-bachelor population were studying for undergraduate qualifications and the rest were pursuing higher level professional and occupational qualifications. Including undergraduate credits, 79 per cent of all students on sub-bachelor programmes were studying on a part-time basis.

5.6 Main types and locations of sub-bachelor qualifications in Northern Ireland

In 2014-15, most of the 18,000 sub-bachelor higher education students in Northern Ireland were taught in its six regional further education colleges. In Tables 5.10 and 5.11, the 11,000 college-taught students are included in the 'other' category because a breakdown by qualification type was not available. The majority of the sub-bachelor population in colleges were studying for qualifications at Level 5, with roughly equal numbers of part-time and full-time students. The minority undertaking Level 4 qualifications were mostly part-time students. All the Level 4 and 5 students were registered and taught by the regional colleges.

Table 5.10: Higher education students on sub-bachelor courses taught at higher education institutions (including the Open University) and further education colleges by type of qualification and location of study, Northern Ireland, 2014-15 (Thousands)

		Registered & taught at HEIs	Registered & taught at FECs[1,2]	Total	% Share
Northern Ireland					
	Foundation Degree	0.4		0.4	2%
	HND	0.0		0.0	0%
	HNC	0.0		0.0	0%
	DipHE	0.2		0.2	1%

	CertHE	0.1		0.1	1%
	Professional qualifications	0.5		0.5	3%
	NVQs	0.0		0.0	0%
	Other diplomas and certificates	3.5		3.5	20%
	Undergraduate credits	1.3		1.3	7%
	Other	0.7	10.9	11.6	66%
	All types	6.7	10.9	17.6	100%

Source: HESA and Consolidated Data Return

Notes:

1 Only reported as Level 4 and 5 students.
2 Includes a small number of apprentices on pilot programmes of Higher Level Apprenticeships.

Table 5.11: Higher education students registered on sub-bachelor courses at higher education institutions (including the Open University) and further education colleges by type of qualification and mode of study, Northern Ireland, 2014-15 (Thousands)

		Higher education institutions			Further education colleges[1,2]			All institutions		
		Full-time	**Part-time**	**Total**	**Full-time**	**Part-time**	**Total**	**Full-time**	**Part-time**	**Total**
Northern Ireland										
	Foundation Degree	0.2	0.2	0.4				0.2	0.2	0.4
	HND	0.0	0.0	0.0				0.0	0.0	0.0
	HNC	0.0	0.0	0.0				0.0	0.0	0.0
	DipHE	0.1	0.1	0.2				0.1	0.1	0.2
	CertHE	0.0	0.1	0.1				0.0	0.1	0.1
	Professional qualifications	0.0	0.5	0.5				0.0	0.5	0.5
	NVQs	0.0	0.0	0.0				0.0	0.0	0.0
	Other diplomas & certificates	0.2	3.3	3.5				0.2	3.3	3.5
	Undergraduate credits	0.1	1.3	1.3				0.1	1.3	1.3
	Other	0.1	0.6	0.7	4.2	6.7	10.9	4.3	7.3	11.6
	All types	0.6	6.1	6.7	4.2	6.7	10.9	4.8	12.8	17.6

Source: HESA and Consolidated Data Return

Notes:

1 Only reported as Level 4 and 5 students.
2 Includes a small number of apprentices on pilot programmes of Higher Level Apprenticeships.

Most of the 7,000 sub-bachelor students taught in the higher education sector in Northern Ireland were enrolled at its two universities. The remainder studied at the Open University and at one of the two university colleges. More of these studied on a part-time basis than those in the further education sector: 91 per cent compared to 61 per cent. In the higher education sector, the numbers enrolled at these levels on non-prescribed programmes greatly exceeded those on undergraduate courses.

The profiles presented here for England, Scotland, Wales and Northern Ireland are based on the sub-bachelor qualifications, credits and units taught in their publicly funded higher education institutions and further education colleges. In 2014-15, some 360,000 sub-bachelor students were registered at these establishments in the UK. In addition, there were an estimated 39,000 individuals undertaking higher level apprenticeships, another 26,000 students on designated sub-bachelor courses taught by private providers, and some 16,000 students studying offshore for a recognised UK sub-bachelor award. There will be others who are currently not counted by the data collection agencies.

Where administrative data on these additional populations is available, we draw on these sources to highlight some characteristics of the population engaged in higher education at these levels.

5.7 Characteristics of the sub-bachelor student population in the UK and England

The variety of provision for sub-bachelor higher education is matched by the pluralism of its student population. For those studying at higher education institutions in the UK, this is generally a more local and less international population than found on bachelor programmes. In 2014-15, nine per cent of sub-bachelor students at these institutions had domiciles outside the UK compared to 14 per cent of bachelor students (Table 5.12). At further education colleges in England, where some three-quarters of higher education students were studying at the sub-bachelor levels in 2012-13, only two per cent of all higher education students had domiciles outside the UK (Saraswat et al, 2014).

Table 5.12: Percentage of bachelor and sub-bachelor students studying at higher education institutions by domicile, gender, age, ethnicity and mode of study, United Kingdom, 2014-15 (Percentages)

	Domicile			Gender		Age[1]			Ethnic minority[2]
	UK	Other EU	Non-EU	Female	Male	20 and under	21-29	30 and over	
UK									
Bachelor									
Full-time	85%	5%	10%	55%	45%	80%	14%	6%	24%
Part-time	97%	1%	2%	57%	43%	10%	40%	50%	14%
All	86%	5%	9%	55%	45%	72%	17%	11%	23%
Sub-bachelor									
Full-time	84%	3%	13%	55%	45%	45%	32%	23%	20%
Part-time	93%	2%	5%	66%	34%	9%	29%	62%	15%
All	91%	2%	7%	63%	37%	45%	32%	23%	16%

Source: HESA

Notes:

1 Based on first year UK domiciled students.
2 Based on first year UK domiciled ethnic minority students.

Women are a clear majority in most parts of sub-bachelor higher education. A larger proportion of women (63 per cent) were pursuing studies at the sub-bachelor levels at higher education institutions than at the bachelor levels (55 per cent). Women on full-time sub-bachelor courses were a smaller majority (55 per cent) than on part-time programmes (66 per cent). In the college sector in England in 2009-10, women accounted for nearly one half (49 per cent) of students on sub-bachelor undergraduate courses and a majority (62 per cent) of those undertaking higher level qualifications. The corresponding proportions of women taught at higher education institutions were larger, at 69 and 66 per cent. Across the main types of sub-bachelor qualifications taught in colleges, only in the HNC and the HND were women in a minority (Parry et al, 2012). For all higher education students in the English further education sector in 2012-13, the proportion of women was 54 per cent. They outnumbered men in both the prescribed and non-prescribed parts of college higher education (Saraswat et al, 2014).

Sub-bachelor students are older than those on bachelor programmes. This is a reflection of the predominantly part-time character of sub-bachelor higher education in the UK, especially in the higher education sector where three-quarters were part-time students compared to nearly two-thirds in the further education sector in 2014-15 (see Table 3.5). In higher education institutions in that year, a majority (55 per cent) of the sub-bachelor population was aged 21 and over, with close to one-quarter aged 30 and over. Those over the age of 20 were just 28 per cent of the bachelor population. In further education colleges in England in 2009-10, where four out of five students were studying at the sub-bachelor levels, a large majority (65 per cent) were in the adult age groups. For all higher education students in the

further education sector in 2012-13, a similar proportion was aged 21 and over (67 per cent). Those undertaking non-prescribed programmes in the college sector were a much older population (85 per cent were aged 25 and over) than students on prescribed courses where just over one-third were in that age group.

Ethnic minority students are a smaller proportion of those on sub-bachelor courses than on bachelor programmes. In 2014-15, UK-domiciled ethnic minority students in higher education institutions comprised 16 per cent of the sub-bachelor population compared to 23 per cent of the bachelor cohort. At both levels, the proportion of ethnic minority students was higher for full-time programmes. In further education colleges in England in 2009-10, around 17 per cent of those studying for undergraduate and higher level qualifications were so defined. In 2012-13, two out of five of all higher education students in the English further education sector had ethnic minority backgrounds. Their proportion was larger on prescribed courses (22 per cent) than on non-prescribed programmes (15 per cent).

At the sub-bachelor levels, there are similarities and some small differences in the profile of apprentices and those on designated courses at alternative providers, as compared to their counterparts in the mainstream sectors of higher and further education. In 2014-15, those undertaking Higher Apprenticeships were mostly aged 25 and over (68 per cent) and were mainly women (65 per cent). Around one in eight had ethnic minority backgrounds (SFA and BIS, 2016). However, women on designated courses at private providers were a larger proportion of students on sub-bachelor courses (52 per cent) than they were on bachelor programmes (where they were a minority, at 45 per cent). Just five per cent of students on approved sub-bachelor courses had domiciles outside the UK. For designated bachelor programmes, the proportion was much higher, at 20 per cent (HESA, 2016).

Subjects allied to medicine, creative arts and design, education, and business and administrative studies figure large at the sub-bachelor levels. In higher education institutions in the UK in 2014-15, by far the largest subject area in sub-bachelor higher education was for subjects allied to medicine (Table 5.13). These courses and qualifications qualified students for a range of occupations in the health professions. Along with other science-related subjects, including engineering and technology (7 per cent) and biological sciences (5 per cent), the science subjects accounted for nearly one half (48 per cent) of the sub-bachelor population. After subjects allied to medicine, it was in the non-science half of the population that the other largest subject areas were found: education (12 per cent); combined studies (11 per cent); and business and administrative studies (10 per cent).

Table 5.13: Percentage of bachelor and sub-bachelor students studying at higher education institutions by subject area and mode of study, United Kingdom, 2014-15 (Percentages)

	Bachelor			Sub-bachelor		
	Full-time	Part-time	Total	Full-time	Part-time	Total
UK						
Medicine & dentistry	3%	0%	3%	1%	0%	0%
Subjects allied to medicine	10%	11%	10%	14%	32%	28%
Biological sciences	11%	12%	11%	8%	4%	5%
Veterinary science	0%	0%	0%	0%	0%	0%
Agriculture & related subjects	1%	0%	1%	5%	2%	3%
Physical sciences	5%	3%	5%	2%	1%	1%
Mathematical sciences	2%	3%	2%	0%	0%	0%
Computer science	5%	6%	5%	4%	2%	2%
Engineering & technology	7%	7%	7%	9%	6%	7%
Architecture, building & planning	2%	2%	2%	3%	1%	2%
Total (Science subject areas)	46%	44%	46%	46%	48%	48%
Social studies	10%	9%	10%	10%	5%	6%
Law	4%	4%	4%	2%	1%	1%
Business & administrative studies	14%	10%	13%	13%	9%	10%
Mass communications	3%	1%	3%	1%	0%	0%
Languages	6%	5%	5%	4%	6%	6%
Historical & philosophical studies	4%	7%	4%	1%	3%	2%
Creative arts and design	10%	3%	9%	10%	1%	4%
Education	3%	5%	4%	11%	13%	12%
Combined	0%	12%	2%	2%	14%	11%
Total (All subject areas)	100%	100%	100%	100%	100%	100%

Source: HESA

In the higher education taught in the further education sector in England, most of which led to sub-bachelor awards, the popular subjects were business and administration, creative arts and design, education and training, and engineering and technology. In 2012-13, science subject areas accounted for less than a quarter (23 per cent) of the prescribed higher education in English further education colleges, with science and engineering (8 per cent) as the largest single science subject. The largest subjects in the prescribed category were outside the science arena: creative arts and design (25 per cent); education (2.3 per cent); and business and administrative studies. In the non-prescribed category, the largest 'sector subject areas' were: education and training; business, administration and law; and health, public services and care (Saraswat et al, 2014). Different again was the order of subjects among the designated courses at alternative providers in England. Three out of five students were enrolled on courses in business and administrative studies. Another 17 per cent were studying law and 9 per cent were studying for subjects in social studies (HESA, 2016).

Behind these broad subject groups are sub-bachelor programmes in specific and specialist fields, sometimes in niche areas. Most are studied on a part-time basis and, outside of undergraduate education, they lead to qualifications awarded by professional bodies and occupational organisations. These are among the least known parts of sub-bachelor higher education.

Since many, if not most, sub-bachelor students are already in employment and so need to combine work and study, calculation of the labour market returns to sub-bachelor qualifications has been difficult, especially where these qualifications serve as transfer or staged awards. The few studies in this area, typically focused on the HND and HNC, have estimated the salary returns as somewhere between the average for A Level qualifications and bachelor degrees (Conlon, 2002). The key message from work in this area is one of substantial variation in the estimated returns to these and other types and levels of vocational qualifications (McIntosh and Morris, 2016).

The generally lower entry requirements for one-year and two-year undergraduate programmes, including alternative entry for adults with relevant experience, is one way that sub-bachelor programmes bring new and different students into higher education. A second is the part-time nature of much sub-bachelor provision, sometimes with part of the curriculum taught in the workplace and where the programme might be designed and operated in partnership with an employer. A third way by which participation in higher education is potentially widened is through the accessibility afforded by local further education colleges. If the award of undergraduate credits is excluded, the location of study for the majority of sub-bachelor students is the college sector. Only in Wales is this not the case. As several studies have reported, larger proportions of new undergraduate entrants in further education colleges were from areas of low participation in higher education, compared to new entrants in higher education institutions (Parry et al, 2012).

6 Futures?

In the years to the end of the decade, a series of proposed reforms in higher and further education will exercise an important influence on the provision and funding of sub-bachelor higher education; on the design, development, validation and award of its qualifications; on the assessment of the quality of teaching at these levels; and on the choice-making, progression and protection of students. These changes are centred on England but with potential impacts in the other parts of UK higher education. They will bear on the sub-bachelor categories of undergraduate education as well as the higher level professional and technical qualifications taught at these levels. They will influence the types and combinations of sub-bachelor provision offered by higher education establishments, by further education colleges and by private providers.

As a result of legislation in 2016 and 2017, new and separate regulatory frameworks have been established in England for undergraduate and postgraduate education on the one side and for higher technical education and training on the other. Undergraduate qualifications at the sub-bachelor levels (Foundation Degrees, HNDs, DipHEs at Level 5, and HNCs and CertHEs at Level 4) will come under the Office for Students (OfS). The OfS will replace the funding council for higher education in England and come into operation in 2018. Higher level technical qualifications and apprenticeships at the sub-bachelor levels will come under a single regulatory body for the whole of technical education. At present, the newly created Institute for Apprenticeships (IfA) has regulatory responsibility for apprenticeships. In 2018, its remit will be expanded to encompass all technical education in England. It will become the Institute for Apprenticeships and Technical Education.

As previously, different sets of sub-bachelor qualifications in England will be the responsibility of the central authorities either for higher education or for technical education and training. Unlike before, the higher level qualifications overseen by the Institute for Apprenticeships and Technical Education will need to meet a common set of national standards and, if approved, they will be placed on a register of regulated technical qualifications at Levels 4 and 5. Entry to the register will make them eligible for public subsidy through government-backed student loans. The approval process was expected to greatly reduce the number of professional, vocational and occupational qualifications at these levels.

In this way, 'technical' qualifications at Levels 4 and 5 were expected to play as major a role in education and training as 'academic' (undergraduate) qualifications at the same levels. In addition to existing further education colleges, universities and training organisations (public or private) wishing to provide one or both sets of sub-bachelor qualifications - as free-standing programmes or embedded in apprenticeships - two new types of specialist institution were expected to be created: National Colleges and Institutes of Technology. Both new institutions would offer technical qualifications and apprenticeships at Levels 4, 5 and above, one type serving the needs of key occupational sectors and the other supporting specific skills and subjects.

On the other side of the system, the new OfS will be the single market regulator for all registered providers of higher education in England, namely: the publicly funded higher education providers; the publicly funded further education colleges; and the alternative providers (essentially, but not exclusively, for-profit and not-for-profit privately funded organisations). The OfS will maintain a register of these providers, monitor their compliance with regulatory conditions using a risk-based approach, decide on applications for awarding powers and university titles, and require all approved providers to have in place arrangements for student protection. It will hold statutory responsibility for quality and standards, enabling it to designate an independent body to carry out this duty and empowering it to make arrangements for the assessment of teaching. These regulatory

and assessment frameworks will apply to all undergraduate education, including provision leading to undergraduate qualifications at the sub-bachelor levels.

In this final section of the report, we outline the main features of the new regulatory landscape for higher education in England and for technical education in England, including the relationships between them. Only those aspects which bear on sub-bachelor qualifications, their providers and their students are highlighted. We then consider the reform agendas for higher and further education in Scotland, Wales and Northern Ireland, including their recent reviews of widening participation, tertiary coordination and apprentice education. Finally, we identify a number of issues for future investigation, especially where sub-bachelor higher education is still poorly understood or which are likely to command increasing attention.

6.1 Proposals for regulatory reform in English higher education

According to the 2016 White Paper on higher education (BIS, 2016b), the existing regulatory architecture for English higher education was unsuited to a system now funded primarily through tuition fees and where, it was claimed, the growth of further education colleges and alternative providers offering higher education 'has significantly changed the marketplace and how students study'. Both sets of institutions were treated 'differently' under current arrangements making it difficult for high quality providers ('challenger institutions') to enter the market, expand their provision, build a track-record and award their own degrees. For its part, the purpose and powers of the funding body for higher education in England had become 'outdated'. They had led to the anomalous situation whereby alternative providers were part of a separate regulatory system operated directly by the responsible government department. Accordingly, there was a need both to simplify the regulatory landscape and 'move from parallel systems to a level playing field, with a clearer choice for students' (BIS, 2015).

In the 2017 Higher Education and Research Act, the Office for Students was established with a regulatory remit, for the first time, covering all types of providers and with powers to protect students. The same legislation brought the research councils and the research functions of the higher education funding body under a single strategic research body: UK Research and Innovation (UKRI). While the UKRI would have responsibility for future research assessment exercises, the OfS is charged to implement the new assessment regime for teaching, the Teaching Excellence Framework (TEF).

6.1.1 A single regulator for higher education

In the preceding White Paper, the OfS was heralded as 'explicitly pro-competition and pro-student choice' (BIS, 2016b). As a 'consumer focused market regulator' it would put the interests of the student at the heart of the regulatory landscape by fostering greater competition, encouraging more diversity and increasing student choice. It was for the OfS to operate a single route into higher education through which all providers were equally able to select an operating model that worked for them.

At the same time, it was necessary for the regulator to apply appropriate controls, even if some of these had the potential to hold back entry and growth among high quality providers. The OfS would introduce a risk-based approach to monitoring institutions that passed the regulatory entry requirements. Where providers were operating effectively, the need for regulation would be reduced. If quality was failing, the OfS had the power to intervene rapidly. In a competitive market, it was possible that some providers would need to close some or all of their courses, or to exit the market completely.

> The possibility of exit is a natural part of a healthy, competitive, well-functioning market and the Government will not, as a matter of policy, seek to prevent this from happening. The Government should not be in the business of recuing failing institutions - decisions about restructuring, sustainability, and possible closure are those institutions' leaders and governing bodies. We want, however, to ensure that students are protected - so for the first time we will be able to require providers to set out and publish plans to protect their students in the event of exit or course closure.(BIS, 2016b: 11)

In summary, the duties of the OfS are to:

- promote the interests of students and provide them with accessible information to make informed choices
- operate a single entry route into the system
- approve new entrants to the sector and manage a register of providers
- apply a risk-based regulatory framework
- assess the quality of teaching (through the TEF)
- incorporate the functions of the Office for Fair Access and report to parliament on progress in widening participation
- grant degree awarding powers and university titles; and
- monitor the financial health of institutions and protect students in the event of course closure or provider failure.

Given the intention to reduce unnecessary restrictions on alternative providers and further education colleges - institutions that have much or most of their higher education at the sub-bachelor levels - these new regulatory conditions will, potentially, have an influence on the scale and scope of this provision. Apart from the inclusion of all levels and modes of undergraduate education in the second year of the TEF (including apprenticeships where there is a qualification within the FHEQ framework), the other changes with a bearing on sub-bachelor higher education are likely to be the operation of the register of providers, the processes and criteria for degree awarding powers, and the improvement of validation services.

6.1.2 A register of higher education providers

Underpinning the risk-based regulatory system will be a register covering the higher education providers regulated by the OfS. There will be three parts to the register. One will be for 'approved (fee cap)' provider status. This will allow their students to access loans to cover fees up to the level of the fee cap at £9,000. These providers will be eligible to receive grant funding, including research funding currently provided by the funding body for higher education in England.

A second will be for 'approved' provider status. This will allow students to access up to £6,000 tuition fee loans per year. Both approved (fee cap) and approved status will require the provider to meet the expectations of the UK Quality Code, the academic standards described in the FHEQ, the requirements governing financial sustainability, management and governance (FSMG) and the principles in the good practice framework of the Office of the Independent Adjudicator (OIA). For approved (fee cap) status, the provider will be required (as currently the case) to agree an access and participation agreement with the OfS if it wanted to charge fees above £6,000. In addition, they will need to comply with more stringent FSMG requirements. An approved status provider on the other hand, will need to have a student protection plan in place and will be required to publish a statement on its actions to promote widening participation.

The third part of the register will be a 'basic' status available to providers who want to be officially recognised as higher education providers but who do not want to access public funding or student support, or obtain a Home Office Tier 4 licence. Their courses must match the academic standards described in the FHEQ and they must subscribe to the OIA. This will 'provide a degree of consumer confidence in these providers that is not present in the current system' (BIS, 2016b).

Although described as 'a fully comprehensive register', it was not compulsory for all providers offering accredited higher education courses to join the register. Nevertheless, it offered new providers a staged structure and process by which they might seek approval for their courses to be recognised for public funding and for their institutions to be granted awarding powers and university titles. While it was acknowledged that bachelor-level qualifications were the primary focus of the reforms, there was recognition that 'academic qualifications at levels 4 and 5 can and should play an important part in HE', including 'as a bridge towards level 6 qualifications' (BIS, 2016b).

Pending these changes, it was expected that the moratorium on new higher national courses at alternative providers would continue, with a 'one in one out' rule so that providers could replace old courses with new programmes in line with student demand. When the new OfS regulatory regime was in place, the moratorium would come to an end and the new risk-based approach will be applied across all eligible courses, at all different types of provider.

Elsewhere in the 2016 White Paper, courses based on the traditional three-year degree were criticised for their inflexibility, with 'insufficient innovation and provision of two-year degrees and degree apprenticeships'. Following the 2017 legislation, institutions would be able to charge higher annual fees for courses that were taught over a shorter period ('accelerated degrees').

6.1.3 Reformed awarding powers and validation arrangements

Inscribed in the 2017 Act were requirements to make it quicker and easier for institutions to award their own degrees and call themselves universities. The current process was judged 'long, convoluted and unnecessarily burdensome'. In future, any high-quality provider with approved status and meeting the FSMG requirements would be able to obtain Foundation Degree or taught-degree awarding powers on a probationary three-year time limited basis without first having to demonstrate a lengthy track record or meet specific and separate degree awarding powers criteria. The experience acquired in this probationary period would count as track record for full degree awarding powers. A provider who could demonstrate that they had met the criteria by the end of that period would be able to progress immediately to full degree awarding powers.

This would be 'a significant improvement' on the present system in which degree awarding powers took at least six years to gain. Holders of probationary awarding powers would not be able to validate degrees at other institutions or be eligible for university status, but holders of full Foundation Degree awarding powers would for the first time be able to validate the Foundation Degrees of other providers.

In addition to degree awarding powers, the OfS would also take over responsibility for conferring university titles from the Privy Council. With removal of the minimum student number criterion for university title and with holders of full degree awarding powers able to obtain these powers indefinitely, the way was opened for them to secure the university title after successfully completing a three-year review period (from when they were first awarded full awarding powers). In this way, smaller and niche providers would be able to benefit from the prestige of the university title. For other establishments, including alternative providers and further education colleges, there was also the possibility of degree awarding powers in a single subject or a defined range of subjects.

> Where the current system is 'all or nothing', in future there will be greater flexibility to suit a wider range of provider operating models. We will retain university college title for those who prefer it. And we will allow providers to obtain foundation or taught DAPs [degree awarding powers] in one or that fit with their specialism, rather than having to become accredited for the provision of all degrees - reducing unnecessary bureaucracy and introducing a proportionate approach. (BIS, 2016b: 30)

In 2016, there were over 200 further education colleges offering courses of higher education. In the vast majority of cases these involved validation arrangements with some among the 139 English institutions with degree awarding powers. Forty-seven of these institutions had validation relationships with alternative providers with specific course designation. The majority of such arrangements were on a contractual basis (via a validation or franchising agreement) and involved the validator charging a fee for their services. Both the fees charged and the services provided could vary widely, with examples of where the same validator might charge different fees to different providers. Validation agreements could also be one-sided, as the power to enter into, and charge for, a validation agreement lay with the validating body.

> Our evidence suggests that this complexity makes it difficult for new entrants to know how to find the best validating partner for them and thus successfully access the market. (DfE, 2017a: 7)

This posed particular difficulties for new entrants 'who may lack the necessary experience and connections' to navigate the validation market effectively.

As part of its duty to promote choice, the OfS will actively encourage providers to develop validation services. Validators will be held to a revised and simplified version of the Quality Code and the OfS will designate exemplar validation arrangements only if they meet the highest requirements. In the event of intractable and sustained failures in the market for validation, the OfS will have the power to designate a 'validator of last resort'.

6.1.4 Plans for technical education and qualifications at the higher skills levels in England

On the college side of the tertiary system were similarly radical proposals to reshape the regulatory system but also to rename its activities, restructure its programmes and bring new types of provider into the sector. Accompanying these reforms is a distinction between technical education and academic education. For those completing the compulsory phase of schooling, there will be two choices: the technical option and the academic option.

In the 2016 Post-16 Skills Plan (Minister of State for Skills, 2016), a reformed 'technical education' route is proposed for England which will parallel that for 'academic education'. Young people will be presented with two choices at the age of 16: the existing academic option leading to A Level and/or applied general qualifications and then to undergraduate higher education; or the technical option leading either to a two-year college-based technical education programme (including a placement in industry) or employment-based technical education (such as an apprenticeship). The technical education pathways will be extended to the 'highest skills levels', through technical education qualifications at Levels 4 and 5 or through higher and degree apprenticeships. Movement will be possible between the two routes, with appropriate bridging programmes enabling them to move in either direction, including for adults returning to study.

These proposals reflect the recommendations of the Sainsbury Independent Panel on Technical Education (Sainsbury, 2016) convened by ministers in 2015. The panel was asked to advise on actions to improve the quality of the skills system in England and, in particular, to simplify its 'over-complex' features. The Sainsbury report built on four previous reviews

commissioned by the Coalition Government to look at specific aspects of the skills system: the Wolf review on vocational education (Wolf, 2011); the Commission on Adult Vocational Teaching and Learning (CAVTL, 2013); the Whitehead review of adult skills (Whitehead, 2013); and the Richard review of apprenticeships (Richard, 2014).

Coinciding with these government-initiated investigations was an OECD review of post-secondary vocational educational education and training in England (Musset and Field, 2013). Significantly, this focused on 'mid-level' skills and qualifications at Levels 4 and 5, otherwise styled 'the hidden world of professional education and training' (OECD, 2014). In comparison with many other OECD countries, England was judged to have too little vocational provision at the post-secondary levels and, except in the strongest programmes, its workplace training was described as limited and variable.

6.1.5 A single body to oversee the whole of technical education

A new generation of apprenticeships and the new routes and qualifications proposed for technical education were the twin strategy in England to address these deficits. An employer-led Institute for Apprenticeships was established in 2017 to regulate the quality of standards and assessment plans. In the Technical and Further Education Act of 2017, the remit of this body was extended to include college-based technical education. The Institute for Apprenticeships and Technical Education will operate from 2018.

Under this body, there would be a common framework of 15 routes across all technical education encompassing both college-based and employment-based learning. The routes would group occupations together to reflect where there are shared training requirements. The proposed routes were: Agriculture, Environmental and Animal Care; Business and Administrative; Catering and Hospitality; Childcare and Education; Construction; Creative and Design; Digital; Engineering and Manufacturing; Hair and Beauty; Health and Science; Legal, Finance and Accounting; Protective Services; Sales, Marketing and Procurement; Social Care; and Transport and Logistics. These occupational routes were due to be introduced in 2019.

Nationally recognised certificates will be put in place for each technical education route at Levels 2 and 3. Technical education at the higher skills levels will also follow national standards and be overseen by the new body. For each of the 15 routes, the Institute will maintain a register of the technical qualifications at Levels 4 and 5 eligible for public funding through government-backed student loans. Initially, this register will be drawn from those qualifications which are 'considered to do the best job' of meeting national standards. The standards used will be set by panels of professionals based on the relevant technical knowledge, skills and 'behaviours' required at the higher levels. They will also align with the standards for apprenticeship programmes in the same route. In populating the register, the Institute will 'normally wish to recognise only a single qualification in a particular area'. There is no expectation that technical qualifications will exist for all routes or all parts of each route. In some cases, apprenticeships alone might suffice.

6.1.6 Area reviews of post-16 education and training institutions

Since 2015, locally-led area reviews have been undertaken in the post-16 education sector to 'identify scope for greater collaboration and efficiency in each local area', representing 'an opportunity to build on existing strengths through greater specialisation' and 'ensure the training provided aligns with local economic priorities' (DfE, 2016: 34). The reviews were normally focused on general further education and sixth-form colleges although, during the analysis phase, the availability and quality of all post-16 academic and work-based provision in each area - including school sixth-forms and higher education institutions - was taken into account. Indeed, higher education institutions along with local authority and 'independent'

providers, could seek to 'opt in' to the review process if they wished. In addition, the review would consider the 'sub-contracting arrangements' in place, such as franchise relationships and progression agreements between universities and colleges (HM Government, 2016).

The need for an extensive all-England review was partly the result of difficulties generated by deep funding reductions in the funding of further education. It was also part of the strategy to improve productivity and economic growth centred on the expansion of apprenticeships and the creation of high-quality professional and technical routes.

> These objectives can only be delivered by strong institutions, which have the high status and specialism required to deliver credible routes to employment, either directly or via further study. These will include a new network of prestigious Institutes of Technology and National Colleges to deliver high standard provision at levels 3, 4 and 5. (HM Government, 2015: 2)

In five waves, the reviews took place in every area of England and were completed in 2017. Through the mergers and other restructuring occasioned by area review, the number of further education colleges was decreased.

> We will need to move towards fewer, often larger, more resilient and efficient providers. We expect this to enable greater specialisation, creating institutions that are genuine centres of expertise, able to support progression up to a high level in professional and technical disciplines, while also supporting institutions that achieve excellence in teaching essential basic skills - such as English and maths. (HM Government, 2015: 3)

In turn, the outcomes of these reviews might be expected to influence the size, character, location and distribution of the sub-bachelor undergraduate education and higher level technical education in the college sector. Furthermore, sixth-form colleges, some of which provided small amounts of higher education, were given the opportunity through post-16 area reviews to establish themselves as 16-19 academies. 'Academisation' would enable these colleges to develop closer partnerships with schools, so building on their particular strengths and 'realising the educational and financial benefits of sharing resources, expertise and administration' (HM Government, 2016).

6.1.7 A network of specialist national colleges

First proposed by the Coalition Government in 2014 to address skills gaps at Levels 3, 4 and 5 in key sectors of the economy (BIS, 2014), the successor Conservative Government announced in 2016 the creation of five National Colleges. These were to provide high-level technical training at Levels 4 to 6 and support for major infrastructure projects in high-speed rail, nuclear, onshore oil and gas, digital skills, and the creative and cultural industries. Each National College would operate through one or more hubs:

- National College for High Speed Rail (with hubs located in Birmingham and Doncaster)
- National College for Nuclear (with hubs located in Somerset and Cumbria)
- National College for Onshore Oil and Gas (with a hub located in Blackpool)
- National College for Digital Skills (with hubs located in London)
- National College for the Creative and Cultural Industries (with a hub located in Essex).

All were expected to be fully operational by 2017.

According to the Post-16 Skills Plan, the National Colleges would have two main roles. The first involved 'teaching students at the highest levels', using teachers with up-to-date

understanding of the industry and 'in environments which accurately simulate the workplace'. The second saw them 'awarding qualifications in their specialist area' and 'setting standards which other colleges across the country could use'. Where they looked to provide education and training up to Level 6, including degree apprenticeships, National Colleges might 'seek to hold specialist degree awarding powers where employers have identified a particular skills gap at this level' (Minister of State for Skills, 2016).

6.1.8 A set of new Institutes of Technology

Qualifications and 'high-standard' provision at Levels 3, 4 and 5 were to be the focus of a second set of new establishments called Institutes of Technology (IoTs). Announced in the 2015 Productivity Plan (HM Treasury, 2015), they would be sponsored by employers, registered with professional bodies and aligned with apprenticeship standards. In the Post-16 Skills Plan, the role of IoTs was to provide higher level technical education in subjects related to science, engineering, technology and mathematics. Each IoT was likely to 'build on infrastructure that already exists but will have its own independent identity, governance arrangements which directly involve employers, and national branding' (Minister of State for Skills, 2016).

A call for proposals to establish IoTs was launched in 2017. The majority of proposals were expected to emerge from the area review process. It was anticipated that many would be based on a further education 'working collaboratively and innovatively across further and higher education and industry usually as part of a consortium (DfE, 2017b). Apart from a college, the lead partner of a consortium might be a higher education institution, a private training organisation or 'employer consortia' representing more than one employer. Alternatively, a local economic partnership or a combined authority might be the lead agency.

As in government statements on previous parallel reforms of higher and further education in England, the need for a 'joined up' approach across the two sectors was emphasised. With sub-bachelor and professional qualifications embedded in higher level apprenticeships, and with technical qualifications at Levels 4 and 5 to be offered by further education colleges, national colleges and institutes of technology, the overlaps and interfaces between the sectors were many.

6.2 Reviews of higher and post-compulsory education in Wales

Of the various reviews on aspects of tertiary education and training in the rest of the UK, those undertaken in Wales were potentially the most far-reaching. They will have significant implications for how sub-bachelor undergraduate education and higher level vocational and work-based education in Wales will be funded, organised and overseen by one or more central authorities. Based on a wide-ranging review of higher education funding and student finance arrangements, the 2016 Diamond report has implications for all types, levels and modes of Welsh higher education. Earlier in the same year, the Hazelkorn report examined ways in which greater coherence and coordination could be given to the Welsh tertiary system, especially relationships between the higher and further education sectors.

6.2.1 Diamond review of higher education funding and student finance

The place of higher vocational and technical education in Wales came under scrutiny in the *Review of Higher Education Funding and Student Finance Arrangements in Wales* (Review of Higher Education, 2015). Established in 2014, the Diamond review panel was primarily concerned with the long-term financial sustainability of Welsh higher education. Nevertheless, other priorities for the review included widening access, supporting skill formation and strengthening part-time provision.

Following an extension to the remit of the review, a specialist sub-panel on further education was convened to help the inquiry 'consider how best to enhance opportunities for students pursuing work-based or occupationally related higher education programmes'. In this way, the review panel 'saw an opportunity for Wales to develop degree apprenticeships or employer-sponsored provision in a way that makes the slogan “learn while you earn” a reality' (Review of Higher Education, 2016).

The inquiry also took a particular interest in the position of part-time students and, ahead of its final report, a substantial study of part-time higher education was commissioned and published by the review panel (Rees, Taylor and Evans, 2015). Given that around a half of part-time higher education students in Wales were studying at levels below the bachelor degree, mostly in higher education establishments, any recommendations in this area were likely to bear on the nature and conduct of sub-bachelor higher education. As noted earlier, a smaller proportion of sub-bachelor higher education was taught in further education colleges in Wales than elsewhere in the UK, the majority through franchised arrangements with partner higher education institutions. A *Review of higher education in further education institutions* in Wales in 2015 recommended that part-time higher education in colleges be expanded in 'critical economic sectors' and that joint strategic planning between the higher education and further education sectors should be intensified, 'particularly in the development of higher technical skills' (Welsh Government, 2015).

Among its proposals for radical reform of the student support system, the Diamond report recommended specific measures to secure 'improved uptake of part-time study in a way that encourages widening access'. On provision and progression at Levels 4 and 5, the existing models of partnership between colleges, universities and training providers were declared 'effective'. Accordingly, the recommendations in this area were aimed at enhancing partnership working and highlighting the 'pivotal role of employers'. Better processes for the approval of advanced apprenticeship frameworks were proposed, along with some development funding for further education colleges 'aiming to make a distinctive offer to students and employers in the field of higher technical education'.

On suitable apprenticeship frameworks for Wales, the report accepted that these would be devised by the Welsh Government and allow, as necessary, greater access to apprenticeship levy monies for all higher education providers. However, this might require legislative change. The reforms proposed in England on degree awarding powers and their implications for existing partnership arrangements in Wales would need to be examined. Finally, the Welsh Government would work with Qualifications Wales and the UK authorities on proposals for a Technical Education Accreditation Council to enable a 'better range of work-focussed short-cycle HE qualifications' (Review of Higher Education, 2016). Implementing these recommendations would:

> help build new opportunities for prospective students and deliver skills that are in demand from employers. These recommendations have the aim of providing a step change in the number of full-time equivalent students in work-based and vocational higher education (including college-based HE), by at least 20 per cent from 2015 to 2020. (Review of Higher Education, 2016: 48)

6.2.2 Hazelkorn review of the oversight of post-compulsory education

Relationships between higher education and further education were at the heart of a separate and wider *Review of the oversight of post-compulsory education in Wales* (Hazelkorn, 2016) undertaken for the Welsh Government. Its main recommendation was for the establishment of a single new authority to have 'regulatory, oversight and co-ordinating authority for the post-compulsory sector'. As a high-level review, there was no specific reference in the Hazelkorn report to sub-bachelor qualifications, although 'a post-compulsory

system perspective' would ensure 'a strategic, coordinated and coherent approach to educational provision', especially that which spanned the two sectors of higher and further education. The recommendations of the review were accepted by the Welsh Government in 2017.

6.3 A strategy for higher apprenticeships in Northern Ireland

Following a review of apprenticeships and youth training launched in 2013, with an interim report published in 2014 (DELNI, 2014a), the Northern Ireland Assembly Government adopted a new strategy and model for apprenticeships. Centre stage in this strategy was a major commitment to higher level apprenticeships, up to Level 8 in the RQF and FHEQ.

> For those who already hold level 3 qualifications, apprenticeships will be available in parallel to further and higher education at levels 4 - 6 (sub-degree and degree levels). For certain occupations there will be opportunities to undertake an apprenticeship at levels 7 and 8 (Master's and Doctorate). (DELNI, 2014b: 25)

At the higher levels, a series of pilots were underway in a number of 'priority' sectors, including information and communication technology, engineering and professional services.

The completion of an apprenticeship would take at least two years and there would be a single award/qualification for apprenticeship occupations at each level. These awards/qualifications would be mapped to international frameworks, such as the European Qualifications Framework, to facilitate their international portability, 'especially important for Northern Ireland, due to high levels of cross-border economic migration with the Republic of Ireland'. The content, duration and assessment of each apprenticeship will be subject to 'rigorous assessment by inspectors' and all those involved in providing off-the-job training will 'undertake professional training in pedagogy'.

Oversight of the new model was to rest with a strategic advisory forum comprising employers, government, trade unions and providers of off-the-job training. Sectoral partnerships would be established to 'design and agree apprenticeship provision' and inform demand at a sectoral level. Quality assurance of apprenticeship provision will be the responsibility of the Northern Ireland Education and Training Inspectorate. Quality assessment of higher level apprenticeships will require a strengthening of current quality indicators 'to align both the requirements of the Quality Assurance Agency and inspection'. These will be the quality standards used by the inspection team and also by providers for self-evaluation.

6.4 A commission on widening access in Scotland

In 2014, the First Minister for Scotland set out her ambition that every young person, irrespective of socioeconomic background, should have an equal chance of accessing higher education. To advise the Scottish Government on the steps necessary to achieve this, a *Commission on Widening Access* was established. Alongside foundational recommendations for a system-wide approach to equalising access, including the appointment of a Commissioner for Fair Access and the setting of access thresholds by universities for all their bachelor programmes, there were specific proposals addressed to the role of college-based HN qualifications in Scottish higher education.

Such courses provided 'a crucial alternative route into higher education' for students from some of the most deprived communities in Scotland (Commission on Widening Access, 2016). The interim report of the commission described the role of college-taught HNs in widening entry to higher education and securing progression to university education as 'a distinctive and respected feature' and 'a real success story' of the Scottish system. The key

to this success was 'articulation'. Rather than as qualifications in their own right, it was the transfer function of HNs that attracted most attention.

> Articulation pathways are the most effective and efficient mechanism for supporting this progression between college and university. Typically, articulation pathways involve collaboration between institutions to ensure that the course curriculum is closely aligned. This alignment can enable students with an HNC to enter a degree programme in second year and those with an HND to enter in third year.
>
> The benefits are clear. Students get full recognition for prior achievement and a prestigious qualification at the end of each successful year. Universities benefit from students who already have experience of HE level study and who are familiar with the curriculum. (Commission on Widening Access, 2015: 62)

Yet, the full potential of articulation as a tool for widening access had yet to be realised. Articulation arrangements were concentrated in a small number of post-1992 universities and less credit was awarded for prior learning by the more selective institutions. While there might be difficulties in aligning the curriculum and pedagogy of higher national qualifications and bachelor degrees, the commission saw 'no good reason why Scotland should persist with an essentially stratified higher education system where learners who take longer to realise their potential have access only to a restricted number of institutions and courses'.

Accordingly, the commission recommended that the Scottish Funding Council 'seek more demanding articulation targets' from those universities that were not significant players in articulation. A second recommendation looked to close monitoring of the expansion of articulation to ensure it continued to support disadvantaged students. A third proposal had implications for HNs themselves. The present model of articulation relied on very close curricular links between specific courses at specific institutions. As a consequence, higher national students were offered a fairly restricted choice of programmes and providers to which they could progress. Working with colleges and higher education institutions, the Scottish Funding Council was asked to explore 'more efficient, flexible and learner centred models of articulation' (Commission on Widening Access, 2016).

Another development with implications for the future of HNs was the policy of college regionalisation and rationalisation pursued by the Scottish Government since 2013. To achieve planned efficiency savings, this involved the restructuring of the further education sector into 13 newly created regions and a reduction in the number of colleges through mergers and the creation of federations. On completion of the reform programme, the number of incorporated colleges decreased from 37 to 20. In 10 regions, there was now a single college. In one of the three multi-college regions, the incorporated colleges were among the 13 academic partners of the University of Highlands and Islands.

As a result of Scottish Government policies to give priority to young people, the funding for short courses and for programmes not leading to a recognised qualification had been reduced. Partly as a consequence, the number of part-time students in the college sector had fallen by 48 per cent since 2008-09 and the number of students aged 25 and over had decreased by 41 per cent (Auditor General for Scotland, 2015). Changes of this order were likely to have had an impact on the operation of the HNC and HND in colleges, the chief location for these qualifications in the Scottish system.

6.5 Issues for debate and investigation

Finally, we highlight some areas for further and future investigation. The exit of the UK from the European Union will have effects on the whole of higher education. These will impact on the private and public sectors of higher education as well as the further and higher education

sectors of tertiary education. These are the zones across which sub-bachelor courses and students are distributed. Monitoring these effects will pose some of the same difficulties of reporting and interpretation as encountered in the pre-Brexit period. A number of research projects are in place to examine the specific impacts on higher education, including the strategic responses of its colleges and universities. In the rest of this section, we focus on issues arising from domestic reform agendas, especially where system-level changes are underway.

6.5.1 Explaining the ups and downs of sub-bachelor qualifications

In this report, we have taken a long view of the development of sub-bachelor higher education in the UK. At the same time, we have adopted a broad definition of what might be encompassed by this zone, including the higher level provision outside undergraduate education. In so doing, a picture of overall decline in the numbers and proportions studying at these levels is traced over half a century, for sub-bachelor higher education in all its forms and styles.

It is important to bring this history and diversity into current debates about the retreat and rescue of part-time undergraduate education. Here the focus has too often been on the bachelor degree rather than the wider population of part-time students studying for a variety of sub-bachelor qualifications. An examination of the reasons for the long-term decline of higher education at these levels has to explain not just the rise and dominance of the bachelor degree, itself a global phenomenon, but the changing functions of sub-bachelor qualifications in the shift to mass higher education.

Significant in this history has been the conversion of formerly free-standing qualifications, such as the HND and HND, into staged and transfer awards. Instructive again has been the career of the DipHE, a qualification which languished as a broad-based two-year programme only later to become the chief qualification for entry to nursing, midwifery and other health professions. As teaching, social work, nursing and many other professional occupations moved to graduate entry, occupationally-specific awards at the sub-bachelor level gave way to more general vocational qualifications with hybrid features and functions. Yet, this is too simple. These were always uneven, uncertain and contradictory movements, and not without modern attempts to marry occupational specificity and educational mobility (as in the model of the Foundation Degree). Notable too has been the absence of a signature or framework qualification below the bachelor degree and, as again with the example of the Foundation Degree, the failure of attempts to establish one.

6.5.2 Increasing the sub-bachelor share of higher education

After a series of interventions to meet or stimulate demand for sub-bachelor qualifications on the undergraduate side, the policy effort has turned - at least in England - to presenting and promoting higher level apprenticeships and higher level technical qualifications as alternatives to mainstream higher education. By offering a wage and avoiding a fee-loan, higher level apprenticeships are intended to pull demand away from traditional full-time undergraduate education in universities and colleges. By undertaking these apprenticeships, individuals will be able to achieve an undergraduate or professional qualification.

Yet one consequence of this policy ambition has been to profile the bachelor degree. After launching the Higher Apprenticeship at all levels up to the master's degree, a separate Degree Apprenticeship will now do special service at the level of the bachelor degree and the master's degree. In England, all elements of apprenticeships at these levels will be regulated by the funding body for higher education (and its successor, the Office for Students). By contrast, it was only after some delay that a settlement was reached between the funding body and Ofsted on their respective roles in the quality assessment of

apprenticeships at the sub-bachelor levels. While work has begun on a QAA characteristics statement for the Degree Apprenticeship, an equivalent statement for the Higher Apprenticeship will need to confront ambiguities and awkward questions about sets of qualifications (prescribed and non-prescribed) not ordinarily considered together.

The other half of the strategy to build higher level education and training outside of the higher education sector will involve a tracked system of academic and technical education beyond the compulsory phase. In this system, the alternative to A Level and undergraduate education will be the technical option based on a common framework of occupational routes and recognised qualifications at the upper secondary and higher levels. The technical track will entail a new set of qualifications reflecting the education and training needs of groups of occupations. Similar to the apprenticeship, the college and the workplace will be the main locations for learning. Unlike their counterparts undertaking apprenticeships, those aiming for technical qualifications at the sub-bachelor levels will be eligible for fee-loans on the same basis as undergraduate students.

Although not proposed with any level of higher education in mind, a third alternative way of increasing the size of the sub-bachelor segment was to open the market to new providers, especially private institutions. What little is known about higher education in the private sector is in relation to courses designated for public funding. Sub-bachelor qualifications have featured strongly, sometimes controversially, in this part of their provision. A new regulatory regime and register in England will potentially bring more private providers into the regulated system and so require them to meet the requirements for different types of provider status. While the register might be viewed as a licence to practise, entry will be on a voluntary basis. In these circumstances, some sub-bachelor provision will not come under these requirements, including where professional qualifications are offered by these providers.

6.5.3 Moving between the tracks, levels and hierarchies of tertiary education

The prospect of a system based on academic and technical tracks will press on academic, policy and political debates about what kinds of students gain access to what types of provision and achieve what sorts of outcome. This is a question about the extent to which arrangements for expansion will lead to more inclusion or show diversion in the social distribution of the student population. If some types of qualifications or institutions are expected to take a larger share of demand than others, then opportunities for students to move between the tracks, levels and hierarchies of tertiary education become a key policy matter.

In Scotland, where the colleges provide nearly all the HN provision and the universities concentrate on bachelor and postgraduate education, the college-located sub-bachelor higher education has contributed significantly to the higher rates of participation in the Scottish system, compared to England and Wales. However, college students transferring with HN qualifications to bachelor degrees receive variable amounts of advanced standing, depending on the courses and institutions they join, with the result that they cluster in the less selective universities. In England, this variability was a reason for the Foundation Degree and its guarantee of progression to the final stage of a bachelor degree. For a higher education institution in England to be involved in sub-bachelor programmes, directly or indirectly through franchising and validation, is generally taken to be a mark of its position in the middle or lower ranks of what is an extended hierarchy of public and private providers.

In the reformed sectors of higher and further education in England, much will depend on the currency and transferability of qualifications as well as a credit system to help enable flexible and lifetime learning in the higher education space. However, the level of student mobility so far achieved has been due mainly to collaborative arrangements between individual

institutions, not the working of credit accumulation and transfer. Neither greater competition between providers nor separate tracks of academic and technical education seem likely to promote student mobility. On the other hand, more market-like conditions will mean some courses or institutions will cease trading. A regulatory requirement is for all recognised providers to have a student protection plan in place to enable their students to complete their programmes in other ways or at other institutions. Even in the absence of collaborative networks, the policy assumption or expectation is one of ease of transfer within an open system.

In the more directed environment of technical education, access to higher level technical qualifications will need to be available for adults as well as young people and open to those working in a variety of fields, not necessarily the occupational group associated with the qualification. In turn, those acquiring higher level technical qualifications will need to find, at various points, programmes of bachelor-level and postgraduate education to broaden their expertise or take specialisation to the next level.

6.5.4 Aligning sector policies and programmes

In each of the UK countries, a two-sector structure of higher and further education is the context for a two-type categorisation and operation of sub-bachelor qualifications. It is not simply that sub-bachelor awards are taught in each of the two tertiary sectors. It is also that responsibility for the regulation, funding and quality of these qualifications is under separate sector bodies. Undergraduate (prescribed) sub-bachelor qualifications are the responsibility of the central authorities in higher education. Higher level (non-prescribed) sub-bachelor awards are the responsibility, at least formally, of the sector bodies for further education, training and apprenticeships.

In England, these structures have for long represented asymmetries of status and bargaining power within and beyond government. One consequence has been that policies for higher education and for further education have not usually been well-aligned, even when they are the responsibility of the same government department. Sub-bachelor higher education is where the interface and overlap between sectors is pronounced, yet policy development has been frequently one-sided, less than coherent and, overall, found wanting. Under the OfS and the Institute for Apprenticeships and Technical Education, the division of tertiary education into two sectors will be largely as before.

Given the purposes and priorities set out for these bodies, two scenarios for sub-bachelor higher education are in view. In one, the arrival of higher level apprenticeships and a new set of higher level technical qualifications will add to the mix of qualifications at these levels, so increasing the range of subjects, fields and specialisms which are studied and the settings in which they are offered. This might not amount to a rationalisation or reconfiguration of sub-bachelor higher education but the choices available to students and those in employment will be extended. Through a combination of bridging programmes, credit transfer arrangements and partnerships between colleges, universities and employers, young people and adults will be able to move between different types, levels and providers of tertiary education and training.

On another reading, a shift in activity and responsibility in sub-bachelor higher education is assumed, if not intended. In this scenario, continuing weak demand for undergraduate qualifications at these levels and growing numbers attracted to higher level apprenticeships and technical qualifications will presage a change in the shape of the provision and more regulatory reach and control exercised by the central body for technical education. In some respects, this might be interpreted as the English system moving closer to the situation in Scotland where the main sub-bachelor qualifications (the HNs) are under the Scottish Qualifications Authority and chiefly provided in the further education sector.

In the Scottish system, this academic division of labour has resulted in a limited measure of coordination between the two sectors, even with a joint funding council for higher and further education. In Wales, on the other hand, there is the real prospect of a single strategic authority for all tertiary education and training, together with a greater role for further education colleges in sub-bachelor higher education. In Northern Ireland, where most provision at these levels is located in the college sector, the pursuit of higher level apprenticeships is unlikely to alter this pattern.

6.5.5 Understanding existing and emerging forms of sub-bachelor education

There are areas of sub-bachelor higher education which are still poorly understood and which merit investigation. Some of these same areas will come into relationship with, or will be potentially changed by, the emergence of sub-bachelor higher education in new guises, modes, settings and combinations. In light of current reform proposals, areas for specific inquiry include:

1 the concept of the higher level apprenticeship, its claims to distinctiveness, and the roles and relationships of the parties responsible for its design, conduct, development and monitoring
2 the contributions made by private providers, their engagements with employers and professional bodies, and their involvements with franchising, validating and awarding authorities
3 the forms taken by higher level technical and professional qualifications, their markets and students, and their occupational families
4 the role of professional bodies and occupational organisations in accreditation
5 the markets for validation, its costs, services and quality, and the models for a validator of last resort
6 the situations in which credits and units are awarded, for what scale and scope of learning, and across levels, subjects and fields
7 the movement of students and employees between providers, sectors and occupations
8 the international markets for sub-bachelor higher education
9 the private and public benefits of sub-bachelor qualifications; and
10 the claims of sub-bachelor higher education to diversity and flexibility of provision, widening participation and enhanced progression, and lifelong learning and continuing professional development.

While the reform and complexity of sub-bachelor higher education in England is likely to attract particular attention, comparison of the approaches and experiments across all four UK countries will assist policy learning. Such an exercise will force a consideration of tertiary patterns and relationships, especially their local, regional, national and global dimensions.

A note on statistical information

Since this was a study of UK sub-bachelor higher education in all its main settings, administrative data was drawn from statistical sources for the UK as a whole and separately for England, Scotland, Wales and Northern Ireland. The base year for the presentation of data was 2014-15, the most recent available at the time of the study. The data presented on historical patterns and trends is taken from government publications and national inquiry reports. Where data is reported from other research and analytical studies, the sources are duly acknowledged. The figures presented in our tables are rounded to the nearest one hundred. Percentages are based on unrounded figures.

In this note, we detail the sources used in this report to build a statistical picture of the students, courses and qualifications taught at the sub-bachelor levels in the various settings in which these UK awards are offered locally, nationally and globally.

Sub-bachelor higher education in publicly funded higher education institutions and further education colleges

Apart from published sources, administrative data was prepared by HESA on higher education students studying in higher education institutions and further education colleges in each of the UK countries. Data collected by HESA on higher education students registered and taught at higher education institutions was provided for England, Scotland, Wales and Northern Ireland. For each country, this included information on higher education students registered at higher education institutions but taught at further education colleges. Data on higher education students registered and taught at further education colleges is collected separately by government departments or national agencies in England, Scotland, Wales and Northern Ireland, based on their own collection systems. Only a basic set of data on higher education in further education colleges in the four jurisdictions is passed to HESA for publication by them. The tables on higher education students in higher education institutions and further education colleges in Section 3 of the report are based on data supplied by HESA, whether collected by the agency or passed to it.

In Section 5, where tables are presented on the types of sub-bachelor qualification in higher education institutions and further education colleges, the data was obtained in other ways. For England, the data on sub-bachelor students registered and taught at higher education institutions and those registered at higher education institutions but taught at further education colleges was prepared by HESA. However, statistical information on the sub-bachelor students registered and taught in further education colleges was taken from the Individualised Learner Record managed by the Skills Funding Agency but processed for us by RCU (a national research and consultancy organisation with expertise in the analysis of administrative data on further and higher education). For Scotland, data from HESA and the Scottish Funding Council were assembled for us by the Scottish Government. For Wales, data from HESA and the Lifelong Learning Wales Record were supplied by the Welsh Government. For Northern Ireland, data from HESA and the Consolidated Data Return were provided by the Department for Employment and Learning. For these reasons, there is sometimes variation in the numbers reported in the data and presented in the tables.

In our specification of data to HESA and the government departments in the devolved administrations we sought to identify the numbers of students taught in higher education institutions and further education colleges for each of the main types of sub-bachelor qualification. Our specification grouped these into 11 qualification types, including two which enumerated the award of credits and units. The 11 types and groupings were: Foundation Degree; HND; HNC; DipHE; CertHE; professional qualifications; NVQs or SVQs; other diplomas and certificates; undergraduate credits; QCF or HN units; and 'other'. In so doing, we recognised an overlap between three of the groupings. The professional qualifications

type grouped together those award titles which made clear their role in professional recognition or accreditation. This was less clear in the case of other diplomas and certificates. The 'other' category was used to carry an assortment of qualifications, including the sub-bachelor qualifications taught in further education colleges in Northern Ireland. This was because these numbers were unavailable for each qualification type. Instead, they were presented to us in two sets: one for Level 4 qualifications and one for Level 5 qualifications.

Sub-bachelor higher education in the Open University

In several of our tables, we identify sub-bachelor qualifications at the Open University separately from other higher education institutions. This is not just because the Open University, as a distributed distance learning provider, is viewed as a national (UK) university, it is also on account of the large number of students deemed to be studying for institutional credits at the sub-bachelor levels. Before 2003, the Open University did not provide a split between bachelor and sub-bachelor undergraduate education in the data returned to HESA. Even after this date, many Open University students were still reported as studying for institutional credit rather than for a named qualification. Furthermore, it was only from 2013 that Open University student numbers were allocated by domicile to each UK country. Previously, they were assigned to England (where the Open University had its administrative centre).

Sub-bachelor higher education in higher level apprenticeships

Data on apprentices undertaking higher level apprenticeships and studying for sub-bachelor qualifications is collected and reported differently in the four UK countries. Given their early stages of development, a limited range of published data is available. For England, our information on Higher Apprenticeships at FHEQ Levels 4 and above was taken from the Statistical First Release on Further Education and Skills published by the Skills Funding Agency and the then Department for Business, Innovation and Skills. We also had access to information on higher level apprenticeships in the Individualised Learner Record processed for us by RCU. For Scotland, the numbers undertaking Modern Apprenticeships at SCQF Levels 8 and above were supplied by Skills Development Scotland. Data on Higher Apprenticeships in Wales at FHEQ Levels 4 and above was collected as part of the Lifelong Learning Wales Record and published by the Welsh Government. In Northern Ireland, Higher Level Apprenticeships at FHEQ Levels 4 and above were piloted in 2014-15. The numbers on these pilots were estimated for us by the Department for Employment and Learning.

Sub-bachelor higher education among private providers

Administrative data on students and programmes at private providers is only collected for those with undergraduate courses designated by the government to enable their students to access public funding. The term alternative providers is used by the government for higher education providers who do not receive recurrent funding from the higher education funding body for England (or other public bodies) and who are not further education colleges. Students on designated courses at alternative providers can access loans and grants from the Student Loans Company (SLC). The first compulsory submission of individualised student data to HESA on enrolments on designated courses was in 2014-15. For that year, data was collected from 63 alternative providers in England, irrespective of whether the student was in receipt of SLC funding. Our numbers are taken from the Experimental First Statistical Release published by HESA.

Sub-bachelor higher education studied wholly offshore

A separate Aggregate Offshore Record has been collected by HESA since 2007. Students located wholly outside the UK might be studying at an overseas campus of a UK institution, at a partner organisation with provision leading to a UK award, or through provision not requiring the student to attend particular classes or events at particular times and particular places (described by HESA as distance, flexible or distributed learning). A distinction is made in the record between students registered at a UK higher education provider and students studying for an award of a UK higher education provider (where they might be registered at the overseas provider or through some other arrangement). The data quality of this record is uneven but has improved in more recent years. However, it should be noted that one UK institution (Oxford Brookes University) has a very large proportion of offshore students. These accounted for 43 per cent of the record. The majority were registered with an overseas partner on programmes of the Association of Chartered Certified Accountants.

Combining administrative data on sub-bachelor higher education

Our report is an attempt to capture the full extent of sub-bachelor higher education as reported in administrative data for the UK and its four jurisdictions. We use these sources to indicate the size and spread of the provision, whether studied within the UK, wholly offshore, through some form of distance learning, or a combination of 'delivery' methods. The great majority of UK sub-bachelor higher education is taught on the home campuses of publicly funded higher education institutions and further education colleges. The administrative data collected on higher education students and courses in the public sectors of higher education and further education is larger and fuller than for the private and offshore parts of UK higher education. Quite possibly only a minority of the sub-bachelor higher education offered by private providers is recognised for public funding to students. Information on the scale and scope of the remainder is not collected by the central authorities.

Although the main sources of statistical information on tertiary education, the individualised student and learner records for higher education institutions and further education colleges are collected on different bases. As a consequence of administrative devolution and then political devolution, there are separate collection and reporting systems for further education and apprenticeships in the UK countries. Notwithstanding these features and cautions, we assemble data from all these records to present an indicative picture, not of the whole provision of UK sub-bachelor higher education but that which is able to be reported in administrative data. This combined picture is shown in Tables 3.1 and 3.2 in Section 3 of the report.

References

Auditor General for Scotland (2015) *Scotland's colleges 2015*. Edinburgh: Audit Scotland.

Cantor, L. M. and Roberts, I. F. (1972) *Further Education in England and Wales*. London: Routledge & Kegan Paul.

Cantor, L. M. and Roberts, I. F. (1983) *Further Education Today. A Critical Review*. London: Routledge & Kegan Paul.

Clark, J. (2002) *Non-prescribed higher education. Where does it fit?* London: Learning and Skills Development Agency.

Commission on Adult Vocational Teaching and Learning [CAVTAL] (2013) *It's about work … Excellent adult vocational teaching and learning. Summary report*. Coventry: Learning and Skills Improvement Service.

Commission on Widening Access (2015) *Interim Report*. Edinburgh: The Scottish Government.

Commission on Widening Access (2016) *A Blueprint for Fairness. The Final Report of the Commission on Widening Access*. Edinburgh: The Scottish Government.

Committee of Inquiry (1963a) *Higher Education. Report*, Cmnd 2154. London: Her Majesty's Stationery Office.

Committee of Inquiry (1963b) *Higher Education. Appendix Two (A). Students and their Education*. Cmnd 2154 – II. London: Her Majesty's Stationery Office.

Conlon, G. (2002) *Financial Returns to HNCs/HNDs*. London: Council for Industry and Higher Education.

Department for Business, Innovation and Skills [BIS] (2011) *Higher Education: Students at the Heart of the System*. London: BIS.

Department for Business, Innovation and Skills [BIS] (2014) *National Colleges – a call for engagement*. London: BIS.

Department for Business, Innovation and Skills [BIS] (2015) *Fulfilling our Potential: Teaching Excellence, Social Mobility and Student Choice*, Cm 9141. London: BIS.

Department for Business, Innovation and Skills [BIS] (2016a) *Specific Course Designation for Alternative Higher Education Providers. Guidance for providers: criteria and conditions*. London: BIS.

Department for Business, Innovation and Skills [BIS] (2016b) *Success as a Knowledge Economy: Teaching Excellence, Social Mobility and Student Choice*, Cm 9258. London: BIS.

Department for Education [DfE] (2017a) *Higher Education and Research Bill: Factsheet on Validation*. London: DfE.

Department for Education [DfE] (2017b) *Institutes of Technology - Next Steps*. London: DfE.

Department for Education and Employment [DfEE] (2000) *Foundation Degrees. Consultation Paper*. London: DfEE.

Department for Employment and Learning [DELNI] (2014a) *Review of Apprenticeships. Interim Report and Consultation Document*. Belfast: DELNI.

Department for Employment and Learning [DELNI] (2014b) *Securing our Success: The Northern Ireland Strategy on Apprenticeships*. Belfast: DELNI.

Department for Education and Skills [DfES] (2003a) *Foundation Degrees. Meeting the need for higher level skills*. London: DfES.

Department for Education and Skills [DfES] (2003b) *The Future of Higher Education*, Cm 5735. London: The Stationery Office.

Department of Education and Science (1966) *A Plan for Polytechnics and Other Colleges*, Cmnd 3006. London: Her Majesty's Stationery Office.

Department of Education and Science (1969) *Report of the Committee on Technician Courses and Examinations*. Her Majesty's Stationery Office.

Department of Education and Science (1972a) *Education: A Framework for Expansion*, Cmnd 5174. London: Her Majesty's Stationery Office.

Department of Education and Science (1972b) *Teacher Education and Training. A Report by a Committee of Inquiry appointed by the Secretary of State for Education and Science, under the chairmanship of Lord James of Rusholme*. London: Her Majesty's Stationery Office.

Department of Education and Science [DES] (1985) *The Development of Higher Education into the 1990s*, Cmnd 9524. London: Her Majesty's Stationery Office.

Department of Education and Science [DES] (1989) *Aspects of higher education in colleges maintained by local education authorities. A report by HM Inspectors*, 277/89. London: DES.

Foundation Degree Task Force (2004) *Report to Ministers*. London: DfES.

Further Education Funding Council [FEFC] (1996) *Vocational Higher Education in the Further Education Sector. Report from the Inspectorate*. Coventry: FEFC.

Hazelkorn, E. (2016) *Towards 2030. A framework for building a world-class post-compulsory education system for Wales. Final report*. Cardiff: Welsh Government.

Higher Education Funding Council for England [HEFCE] (2010) *Foundation degrees. Key statistics 2001-02 to 2009-10*. Bristol: HEFCE.

Higher Education Funding Council for England [HEFCE] (2013) *Higher education in England. Impact of the 2012 reforms*. Bristol: HEFCE.

Higher Education Funding Council for England [HEFCE] (2014a) *Higher education in England 2014. Analysis of latest shifts and trends*. Bristol: HEFCE.

Higher Education Funding Council for England [HEFCE] (2014b) *Pressure from all sides. Economic and policy influences on part-time higher education*. Bristol: HEFCE.

Higher Education Funding Council for England [HEFCE] (2014c) *Undergraduate courses other than first degrees. An analysis of recent trends*. Bristol: HEFCE.

Higher Education Quality Council [HEQC] (1994) *Choosing to change. Extending access, choice and mobility in higher education*. London: HEQC.

Higher Education Quality Council [HEQC] (1997) *Regulatory frameworks for assuring academic standards in credit-based modular higher education*. London: HEQC.

Higher Education Statistics Agency [HESA] (2016) *Experimental Statistical First Release 235. Higher Education Student Enrolments and Qualifications Obtained on Undergraduate Designated Courses at Alternative Providers in England 2014/15*. Cheltenham: HESA.

HM Government (2015) *Reviewing post-16 education and training institutions*. London: Department for Business, Innovation and Skills.

HM Government (2016) *Reviewing post-16 education and training institutions. Updated guidance on area reviews*. London: Department for Business, Innovation and Skills.

HM Treasury (2015) *Fixing the foundations: Creating a more prosperous nation*, Cm 9098. London: HM Treasury.

Hughes, T., Porter, A., Jones, S. and Sheen, J. (2013) *Privately funded providers of higher education in the UK*, BIS Research Paper Number 111. London: BIS.

Independent Review of Higher Education Funding and Student Finance [Independent Review] (2010) *Securing a Sustainable Future for Higher Education*. London: BIS.

Learning and Skills Council [LSC] (2006) *Partnership, Provision, Participation and Progression: the Learning and Skills Council Strategy for Higher Education*. Coventry: LSC.

Learning and Skills Council [LSC] (2008) *Further Education and the Delivery of Higher-level Qualifications*. Coventry: LSC.

Leitch Review of Skills [Leitch Review] (2006) *Prosperity for all in the global economy - world class skills*. *Final Report*. London: HM Treasury.

McIntosh, S. and Morris, D. (2016) *Labour Market Returns to Vocational Qualifications in the Labour Force Survey*, Research Discussion Paper 002. London: Centre for Vocational Education Research.

Minister of State for Skills (2016) *Post-16 Skills Plan*, Cm 9280. London: Department for Education.

National Audit Office [NAO] (2014) *Investigation into financial support for students at alternative higher education providers*. London: NAO.

National Committee of Inquiry into Higher Education [NCIHE] (1997a) *Higher education in the learning society. Main report*. London: NCIHE.

National Committee of Inquiry into Higher Education [NCIHE] (1997b) *Higher education in the learning society. Report of the Scottish Committee*. London: NCIHE.

Office of Qualifications and Examinations Regulation [Ofqual] (2015) *Qualification and Component Levels. Requirements and Guidance for All Awarding Organisations and All Qualifications*, Ofqual/15/5774. London: Ofqual.

Organisation for Economic Cooperation and Development [OECD] (1973) *Short Cycle Higher Education. A Search for Identity*. Paris: OECD.

Organisation for Economic Cooperation and Development [OECD] (2013) *A Skills beyond School Review of England*. Paris: OECD.

Organisation for Economic Cooperation and Development [OECD] (2014) *Skills beyond School. Synthesis Report*. Paris: OECD.

Organisation for Economic Cooperation and Development [OECD], European Union and UNESCO-UIS (2015) *ISCED 2011 Operational Manual. Guidelines for Classifying National Education Programmes and Related Qualifications*. Paris: OECD.

Parry, G. (2005) British higher education and the prism of devolution. In *Understanding Mass Higher Education. Comparative Perspectives on Access*. T. Tapper and D. Palfreyman (Eds.) Abingdon: RoutledgeFalmer.

Parry, G., Davies, P. and Williams, J. (2004) *Difference, Diversity and Distinctiveness: Higher Education in the Learning and Skills Sector*. London: Learning and Skills Development Agency.

Parry, G., Callender, C., Scott, P. and Temple, P. (2012) *Understanding Higher Education in Further Education Colleges*, BIS Research Report 69. London: Department for Business, Innovation and Skills.

Pratt, J. (1997) *The Polytechnic Experiment 1965-1992*. Buckingham: Open University Press.

Qualifications and Curriculum Authority [QCA], Curriculum and Assessment Authority for Wales [ACCAC] and Council for Curriculum, Examinations and Assessment [CCEA] (2000) *Arrangements for the statutory regulation of external qualifications in England, Wales and Northern Ireland*. London: QCA.

Quality Assurance Agency for Higher Education [QAA] (2000*) The national qualifications framework for higher education qualification in England, Wales and Northern Ireland: a position paper*. Gloucester: QAA.

Quality Assurance Agency for Higher Education [QAA] (2001a) *The framework for higher education qualifications in England, Wales and Northern Ireland*. Gloucester: QAA.

Quality Assurance Agency for Higher Education [QAA] (2001b) *The framework for qualifications of higher education institutions in Scotland*. Gloucester: QAA.

Quality Assurance Agency for Higher Education [QAA] (2002) *Foundation Degree: qualification benchmark (final draft)*. Gloucester: QAA.

Quality Assurance Agency for Higher Education [QAA] (2010) *Foundation Degree qualification benchmark*. Gloucester: QAA.

Quality Assurance Agency for Higher Education [QAA] (2014) *UK Quality Code for Higher Education. Part A: Setting and Maintaining Academic Standards*. *The Frameworks for Higher Education Qualifications of UK Degree-Awarding Bodies.* Gloucester: QAA.

Quality Assurance Agency for Higher Education [QAA] (2016a) *QAA Reviews of Alternative Providers. Key Findings 2013-15*. Gloucester: QAA.

Quality Assurance Agency for Higher Education [QAA] (2016b) *QAA Reviews of Alternative Providers*. Gloucester: QAA.

Rees, G., Taylor, C. and Evans, C. (2015) *Part-time Higher Education in Wales: Final Report. Evidence to the Review of Higher Education Funding and Student Finance Arrangements in Wales*. Cardiff: Wales Institute of Social and Economic Research, Data and Methods.

Review of Higher Education Funding and Student Finance Arrangements in Wales [Review of Higher Education] (2015) *Interim Report*. Cardiff: Welsh Government.

Richard, D. (2012) *The Richard Review of Apprenticeships*. London: BIS.

Robertson, D. (2002) *Intermediate-level qualifications in higher education: an international assessment. A report to HEFCE by Professor David Robertson Liverpool John Moores University*. Bristol: HEFCE.

Sainsbury, D. (2016) Report of the Independent Panel on Technical Education. London: BIS and DfE.

Saraswat, A., Hudson, A. and Thompson, A. (2014) *Understanding Part Time College Higher Education*. London: Association of Colleges.

Scottish Education Department (1983) *16-18s in Scotland: an Action Plan*. Edinburgh: Her Majesty's Stationery Office.

Secretary of State for Education and Science (1965) Speech by the Secretary of State for Education and Science, Rt Hon Anthony Crosland MP, at Woolwich Polytechnic, 27 April 1966.

Shury, J., Adams, L., Barnes, M., Huntley Hewitt, J. and Oozeerally, T. (2016) *Understanding the Market of Alternative Higher Education Providers and their Students in 2014*. London: BIS.

Silver, H. (1990) *A Higher Education. The Council for National Academic Awards and British Higher Education 1964-1989*. Basingstoke: Falmer Press.

Skills Funding Agency [SFA] and Department for Business, Innovation and Skills [BIS] (2016) *Statistical First Release. Further Education and Skills. Learner Participation, Outcomes and Level of Highest Qualification Held. Summary and Key Headlines – 2015/16*. London: SFA and BIS.

Tight, M. (2009) *The Development of Higher Education in the United Kingdom since 1945*. Maidenhead: Open University Press.

United Nations Educational, Scientific and Cultural Organisation [UNESCO] (1997) *International Standard Classification of Education ISCED1997*. Paris: UNESCO.

Welsh Government (2015) *Review of higher education in further education institutions, 063/2015*. Cardiff: Department for Education and Skills.

Whitehead, N. (2013) *Review of Adult Vocational Qualifications in England*. London: UK Commission for Employment and Skills.

Wolf, A. (2011) *Review of Vocational Education - The Wolf Report*. London: BIS and DfE.

Wright, P. and Ellis, J. (2000) *An Investigation of the Actual and Potential Provision of Qualifications at HE Levels 1 and 2. Final Report to the Department for Education and Employment*. Gloucester: QAA.

QAA1966 - Oct 17

Southgate House, Southgate Street, Gloucester GL1 1UB
Registered charity numbers 1062746 and SC037786

Tel: 01452 557050
Web: www.qaa.ac.uk