

The Impact of International Students in Scotland

Scottish Government response to the Migration Advisory Committee's consultation on the impact of international students in the UK

March 2018

CONTENTS

MINISTERIAL FOREWORD	3
INTRODUCTION	4
CHAPTER ONE INTERNATIONAL STUDENTS IN SCOTLAND	6
CHAPTER TWO DIRECT ECONOMIC IMPACT OF INTERNATIONAL STUDENTS	11
CHAPTER THREE EDUCATIONAL, SOCIAL AND CULTURAL IMPACT OF INTERNATIONAL STUDENTS	16
CHAPTER FOUR IMPACT ON PUBLIC SERVICES AND WIDER ECONOMY	18
CHAPTER FIVE IMPACT ON THE LABOUR MARKET	20
CONCLUSION	23
ANNEX	25

MINISTERIAL FOREWORD



Scotland has always been an open and welcoming nation, and that welcome has been extended to the many people from around the world who choose to study, live, work and raise their families here. Their presence in our communities across the country has helped make Scotland the modern, dynamic nation it is today.

International students have an incredibly positive impact in Scotland. They make up almost a quarter of all students at our universities and make a significant financial and academic contribution to our institutions. They bring important social, cultural and economic benefits to our society and add to the diversity of our communities, enriching the learning experience and supporting local businesses and jobs. Those that choose and are able to stay contribute valuable skills to our workforce and support the sustainable growth of our economy. Those who move elsewhere in the world become valuable friends and ambassadors of Scotland.

Additionally, international students are a potential source of long-term immigration. Scotland faces significant demographic challenges. There will be more deaths than births every year for the next 25 years. The profile of Scotland's population is ageing faster than that of the UK as a whole. Migration is projected to account for all of Scotland's population growth between 2016 and 2041. Attracting skilled people to live and work in Scotland is vital to the nation's economic and social health.

We therefore need an immigration system that recognises the particular needs of Scotland, especially the importance of being able to attract and retain international students. The implications of Brexit gives us huge cause for concern, as the potential loss of freedom of movement of people with EU Member States could severely undermine Scotland's ability to attract talented students from across Europe, reducing the economic benefits that they bring and compounding the demographic challenges that we face.

There is broad support across educational institutions, businesses and political parties in Scotland on the need for change in the UK Government's approach to international students to ensure that Scotland remains a welcoming place for talented and ambitious students from around the world.

The UK Government's refusal to consider the re-introduction of a meaningful post-study work route are counter-productive to our aspirations. The evidence presented in this paper makes it clear that we should celebrate and encourage the presence of international students in our institutions and communities.

A handwritten signature in black ink, appearing to read 'S Anne Somerville'.

Shirley-Anne Somerville
Minister for Further Education, Higher Education and Science
March 2018

INTRODUCTION

Our position

International students have an overwhelmingly positive impact on Scotland's economy and society. They play a vital role in making Scotland an outward-looking country, enhancing its skills base and building connections with the wider world. We extend a warm welcome to those coming to study in Scotland and hope that many will continue to choose to live here.

International students make a valuable direct economic contribution to educational institutions. The income from international students in higher education institutions, particularly tuition fees paid by students from outside the EU, has grown consistently and significantly in recent years, directly supporting employment at institutions and providing a valuable income stream to support a wide range of teaching and research activity.

The benefits of international students to the wider economy are considerable. Both EU and non-EU international students spend money on accommodation, travel and a wide range of other living and recreational expenses. This amounts to tens of thousands of pounds for each individual student, contributing hundreds of millions of pounds to the Scottish economy. This vastly outweighs the costs of providing public services such as healthcare and education for students and their dependents, as well as the cost to the Scottish Government of paying tuition fees for eligible EU students.

International students support the range and quality of education provision in Scotland. A multicultural, multinational learning environment is beneficial for all students who participate in it, raising cultural awareness and a global perspective among domestic students. These skills are valued by business. The recruitment of international students also allows educational institutions to exploit economies of scale and support the viability of some courses, particularly in some science, technology and engineering-related disciplines, ensuring that they remain available for domestic students to study.

International students support Scotland's reputation and visibility overseas. Graduates from Scottish institutions who move overseas take with them an awareness of and affection for Scotland, along with contacts and connections that may be of value in their future careers. This network is reinforced and sustained by institutions' own alumni engagement activity, bringing both direct benefits to the institutions and broader benefits to Scotland's international economic, social and cultural connections.

International students are a potentially valuable longer-term resource for Scotland's workforce. Inward migration is essential for the Scottish economy given the demographic challenges that Scotland faces. International students represent a future pool of talented individuals who can be drawn into the workforce. Scotland currently does well in attracting students to Scottish institutions. But in the face of increasing competition from other countries for the best global talent, the UK's immigration system has to be improved to allow Scotland to retain students after

graduation and draw them into the workforce, through an inclusive migration system which includes a post study work offer that meets Scotland's needs.

About this paper

This paper sets out the Scottish Government's response to the call for evidence launched by the UK Migration Advisory Committee (MAC) on the impacts of international students in the UK.

This paper follows the themes set out in the call for evidence:

- **Chapter one** describes the profile of the international student body in Scotland.
- **Chapter two** provides information about the direct economic impact of international students in terms of student fees, loan arrangements, support for employment in educational institutions and spending by migrant students in the wider economy.
- **Chapter three** assesses the educational, social and cultural impact of migrant students on Scotland. This includes the effect on the teaching and learning experience in educational institutions; the impact on educational opportunities to UK students; and the contribution of international students to social and cultural life in educational institutions and wider society.
- **Chapter four** considers the impact of migrant students on the provision of public services such as housing, transport and health. It also examines their effect on tourism and other aspects of the economy beyond education.
- **Chapter five** looks at the role of migrant students in the labour market.

CHAPTER ONE – INTERNATIONAL STUDENTS IN SCOTLAND

International students at Scotland’s Higher Education Institutes (HEIs)

Scotland is highly successful, compared to the UK and internationally, in attracting international students to study at Scottish higher education institutions. The latest available data suggests that international students account for 22% of students at Scottish higher education institutions (HEIs) compared to 19% of students studying in HEIs across the UK as a whole. International students account for 19% of international students in England, 16% in Wales, and 10% in Northern Ireland. The proportion of non-UK students enrolled in HEIs has remained relatively constant over the past five years, with non-UK students consistently making up 2-3% more of student enrolments in Scottish HEIs than across the UK as a whole.

Of the 241,935 students enrolled in Scottish HEIs in 2016-17 (both undergraduate and postgraduate), 189,630 (78%) were UK domiciled, 31,045 (13%) were non-EU domiciled and 21,245 (9%) were EU (non-UK) domiciled.

Student enrolments on HE courses in UK HEIs by domicile, 2016-17¹

	UK Students		International Students	
	Number	% of total number of students	Number	% of total number of students
Scotland	189,630	78%	52,290	22%
England	1,528,030	81%	363,585	19%
Wales	108,190	84%	21,205	16%
Northern Ireland	49,275	90%	5,295	10%
UK	1,875,125	81%	442,375	19%

¹ <https://www.hesa.ac.uk/data-and-analysis/students>. Numbers rounded to nearest 5.

Student enrolments on HE courses in UK HEIs by domicile, 2012-13 to 2016-17²

	2012-13	2013-14	2014-15	2015-16	2016-17
All UKs					
Total UK	1,915,150	1,863,860	1,829,195	1,842,315	1,875,125
EU	125,330	125,300	124,575	127,440	134,835
non-EU	299,990	310,195	312,010	310,575	307,540
Total Non-UK	425,320	435,495	436,585	438,010	442,375
Total	2,340,470	2,299,355	2,266,075	2,280,830	2,317,880
% non-UK	18%	19%	19%	19%	19%
Scotland					
Total UK	184,005	182,445	182,545	184,630	189,630
EU	18,640	19,750	20,805	20,945	21,245
non-EU	28,305	28,610	29,210	29,980	31,045
Total Non-UK	46,945	48,360	50,010	50,925	52,290
Total	230,950	230,805	232,570	235,565	241,935
% non-UK	20%	21%	22%	22%	22%

Whilst international students are attracted to study in Scotland at both an undergraduate and postgraduate level, they are much more prevalent in postgraduate courses. In 2016-17, international (both EU and non-EU domiciled) students accounted for 58% of students on full-time postgraduate courses in Scottish HEIs and 19% of students on full-time undergraduate courses.

Scotland attracts a high proportion of international students relative to other OECD countries.³ In 2014, Scotland ranked second (21.5%), behind Luxembourg (44%), out of the OECD countries for which data was available. The UK ranked fifth (18%), closely followed by Switzerland (17%). New Zealand was ranked third (19%), and Australia was ranked fourth (18%).

² <https://www.hesa.ac.uk/data-and-analysis/students>. Numbers rounded to nearest 5.

³ OECD Education at a Glance 2016, Indicator C4.1 <http://www.oecd.org/edu/education-at-a-glance-19991487.htm> Whilst the publication only provides data for the UK as a whole, it is possible to provide an estimate of Scotland's international performance by combining HESA data for Scotland on the percentage of international students studying at Scottish HEIs (at both undergraduate and postgraduate level) in 2014/15 with OECD data for the other countries. It should be noted that these two data sets are not directly equivalent, however when comparing the figure for the UK across the two data sets there is only a difference of 0.5 percentage points suggesting that the two sources are broadly comparable.

Students at Scottish HEIs split by mode of mode of attendance, level of study & domicile, 2016-17⁴

Mode	Level	EU	Non-EU	UK	All
Full-time	Postgraduate	15%	43%	42%	36,495
	Undergraduate	10%	9%	82%	147,300
	Total	11%	15%	74%	183,795
Part-time	Postgraduate	5%	7%	88%	22,330
	Undergraduate	2%	3%	95%	35,805
	Total	3%	5%	92%	58,140
All	Total	9%	13%	78%	241,935

EU students at higher education institutions

International students as a whole make up a higher proportion of the student body in Scottish HEIs (22%) than they do for the UK as a whole (19%). However, a larger proportion of international students in Scotland are from within the EU than is the case for the rest of the UK. This may be a consequence of the different arrangements for tuition fees for EU students in Scotland compared to elsewhere in the UK, as discussed in chapter two of this paper.

Of those students studying at Scottish HEIs from within the EU, the countries with the highest proportion of students were Germany (5% of the total number of both EU and non-EU international students), Ireland (4%), France (4%), Italy (3%), Greece (3%) and Bulgaria (3%).

Non-UK EU student enrolments in Scottish HEIs – top ten sending countries 2016-17⁵

Country of origin	Number of students	% of non-UK student total
Germany	2,805	5%
Ireland	1,880	4%
France	1,850	4%
Italy	1,830	3%
Greece	1,540	3%
Bulgaria	1,335	3%
Spain	1,250	2%
Poland	960	2%
Finland	825	2%
Sweden	820	2%

UCAS data shows that the number of non-UK EU-domiciled students applying to Scottish HEIs in the 2017 cycle decreased by 3.7% compared to the previous year, decreasing by 730 applicants to 19,090. This compares to the number of non-UK

⁴ <https://www.hesa.ac.uk/data-and-analysis/students>. Numbers rounded to nearest 5.

⁵ <https://www.hesa.ac.uk/news/11-01-2018/sfr247-higher-education-student-statistics/location>.

EU-domiciled students applying to English HEIs decreasing by 5.1% compared to the previous year, decreasing by 2,250 applicants to 42,080.

The number of non-UK EU-domiciled applicants who were accepted by Scottish HEIs in 2017 decreased by 10% (470 students) from 4,650 to 4,175, although this follows an increase to a record high the previous year. The number of non-UK EU-domiciled applicants accepted by English HEIs decreased by 1 per cent (270 students) from 24,840 to 24,565.

The decline in applications and acceptances from EU students to study in Scotland broadly coincides with the timing of the EU referendum and the beginning of the UK Government process to withdraw from the European Union.

Non-EU students at higher education institutions

Of those students from outwith the EU, the countries with the highest proportion of students were China (16% of all EU and non-EU international students), the United States (9%), India (3%) and Malaysia (3%).

Non-EU student enrolments in Scottish HEIs – top ten sending countries, 2016/17⁶

Country of origin	Number of students	% of non-UK student total
China (exc. Hong Kong)	8,475	16%
United States	4,480	9%
India	1,425	3%
Malaysia	1,415	3%
Nigeria	1,265	2%
Canada	1,055	2%
Hong Kong	940	2%
Saudi Arabia	760	1%
Norway	700	1%
Singapore	670	1%

International students at Scotland's colleges

The number of students at Scotland's colleges whose home area prior to study was overseas (both EU and non-EU) has been consistently fairly small, representing around 1% of all students. While there may be a sizeable number of students from other countries already living in Scotland who attend a college, we cannot be certain that the opportunity to study is the primary reason for them to choose to live in Scotland.

⁶ <https://www.hesa.ac.uk/news/11-01-2018/sfr247-higher-education-student-statistics/location>

Enrolments at Scotland's colleges, by student's home area prior to study, 2011-12 to 2015-16⁷

Domicile	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
UK	317,975	295,025	297,390	294,414	278,575	289,959
EU	760	682	565	469	487	510
Non-EU	1,911	1,879	1,873	2,128	1,987	1,339
Total non-UK	2,671	2,561	2,438	2,597	2,474	1,849
Total	320,646	297,586	299,828	297,011	281,054	291,843
% Non-UK	1%	1%	1%	1%	1%	1%

While the number of international students at Scotland's colleges is low, the data shows that international students make up a larger share of the student body in Scottish HEIs than they do for the UK as a whole, and that students from other EU countries account for a larger proportion of all international students than for the UK overall. This suggests that the economic contribution of international students at HEIs, particularly EU students, will be greater and the impact of the policies that affect them will be felt more acutely in Scotland than elsewhere in the UK.

⁷ Scottish Funding Council Infact database, <https://stats.sfc.ac.uk/infact/>

CHAPTER TWO – DIRECT ECONOMIC IMPACT OF INTERNATIONAL STUDENTS

As shown earlier, the number of international students at Scotland's colleges is relatively small, at 1,849 in 2016-17, representing 1% of the total number of students at college. By contrast there are over 28 times as many international students at Scottish HEIs. For this reason, and because of a relative lack of data on the economic and broader impact of international students at college, this chapter focusses on the economic impact of international students at HEIs.

Scotland is highly successful in attracting international students to study at Scottish HEIs. However, it is important to consider differences in tuition fee levels when comparing across the nations of the UK.

Since 2008 the Scottish Government has paid the tuition fees of full-time, first-time Scots-domiciled students and a limited number of postgraduate students. EU law requires that citizens resident in other EU Member States are eligible for the same fees support as home students. However, this does not apply within Member States. Therefore, while eligible EU students at Scottish HEIs generally have their fees paid by the Scottish Government, since 2012-13 undergraduate students from England, Wales and Northern Ireland have paid tuition fees to study in Scotland. Similarly, undergraduate students from Scotland pay fees to study in other parts of the UK.

The level of fees for UK students is set by the HEIs on a course by course basis up to a limit of £9,000 a year. HEIs are obliged to declare fees in Scotland for UK students in advance. According to Scottish Government analysis, in 2014-15 the average fee paid by UK students at Scottish HEIs was £7,681⁸.

There is no limit on the number of non-EU international students that Scottish HEIs can recruit. The level of fees charged by HEIs for non-EU international students is for each individual institution to determine. In 2015-16 these ranged from £8,880 to £47,200 per year, depending on the institution and specific course.⁹

At postgraduate level, students are charged fees regardless of their domicile. However there are separate fee scales for students whose status is "home" (UK or EU) and those whose status is "overseas".

In Scotland, of the total tuition fee income raised by Scottish HEIs in 2015-16, home and EU domiciled students¹⁰ accounted for 48% of income (£446m) while non-EU domiciled students accounted for 52% (£488m). Whilst it is not appropriate to compare total international tuition fee income in Scottish HEIs with the other nations of the UK due to the differences in fees charged to EU students at undergraduate level, it is possible to compare fee income from non-EU domiciled students.

⁸ The average fee is based on 2014/15 tuition fee levels, and is based on the standard four-year degree in Scotland.

⁹ Audit of higher education in Scottish universities, Audit Scotland, July 2016, www.audit-scotland.gov.uk/report/audit-of-higher-education-in-scottish-universities

¹⁰ At undergraduate level, tuition fee income from 'home and EU domiciled students' will comprise only rest of UK students as Scottish and EU students are not charged fees. However, at postgraduate level, it will comprise students from Scotland, the rest of the UK and EU students.

Average fee income from non-EU domiciled students in UK HEIs, 2015-16¹¹

	Number of non-EU domiciled students	Fee income from non-EU domiciled students (£)	Mean fee income per non-EU domiciled student (£)
England	261,275	3,790,096,000	14,506
Wales	16,730	150,520,000	8,997
Scotland	29,980	488,360,000	16,290
Northern Ireland	2,585	25,270,000	9,776
UK	310,570	4,454,246,000	14,342

When considering total fee income received from non-EU domiciled students and the number of non-EU domiciled students enrolled in 2015-16, Scottish HEIs receive an average fee income per student of £16,290, higher than the UK average of £14,342.¹²

Increasing significance of international students

Enrolments at Scottish HEIs split by domicile, 2005-06 to 2016-17

Domicile	2005-06		2016-17		Change 2005-06 to 2016-17	
	Enrolments	% of total	Enrolments	% of total	Enrolments	%
UK	193,050	87%	189,630	78%	-3,415	-2%
International	29,035	13%	52,290	22%	23,255	80%
Total	222,085	100%	241,935	100%	19,850	9%

Between 2005-06 and 2016-17, the total number of students enrolled in Scottish HEIs increased significantly, up 9%. Over this period, whilst the number of UK domiciled students has remained relatively constant, the number of international (both other EU and non-EU) students at Scottish HEIs has increased by 80%.

This increase in international students (particularly non-EU international students) is reflected in the changing financial position of Scottish HEIs. Between 2005-06 and 2015-16 overall income in the university sector grew by 38% in real terms. The largest percentage increase in income in that time was in non-EU tuition fees, which increased from £140 million to £438 million in cash terms, a real-terms increase of

¹¹ HESA student and qualifier statistics 2015/16, HESA HE Finance Plus 2015/16

¹² These comparisons do not take account of the different compositions of courses which non-EU students may attend across the countries of the UK. For example, if a higher proportion of students enrol in medical courses in Scotland, which generally charge higher fees, we would expect to see a higher overall average fee in Scotland compared to the rest of the UK. The data is not clear whether the higher average fees in Scotland reflect a perception among non-EU students that there is a premium to be gained from studying at Scottish HEIs relative to other UK HEIs, or whether it is down to differing compositions of course enrolments.

154%. By comparison, income from research grants and contracts increased from £381 million to £748 million in cash terms, and increase of 60% in real terms.¹³

Support for fees and living costs

In addition to tuition fees, the Scottish Government is responsible for policy and funding for living cost loans and bursaries for eligible EU students at Scottish HEIs. The Students Awards Agency Scotland (SAAS) is responsible for delivering financial support to students. Unlike Scottish domiciled students, EU students are generally not entitled to living cost loans.

In Scotland, tuition fees are generally paid only for full-time students undertaking their first undergraduate degree or some specified postgraduate courses. The majority of students undertaking postgraduate courses pay their own fees.

In 2016-17, SAAS provided tuition fee support to 14,785 EU students at an average of £1,900 per student. 91% of these students were undergraduate students.

Using 2014-15 baseline data, the cost of maintaining free tuition for EU students in all four years of their undergraduate degree course at a Scottish university is around £97 million per year. This includes funding from the Student Awards Agency Scotland for tuition fees as well as teaching grants from the Scottish Funding Council.

Employment in educational institutions

As described earlier, international students make up a significant proportion of the student body at Scottish HEIs. The income generated from non-EU international students is significant and has been increasing.

The distribution of international students between Scottish HEIs varies considerably. For example, while on average international students make up 22% of all students at Scottish HEIs, they account for 47% of all students at the University of St Andrews compared to 3% at the University of the Highlands and Islands.¹⁴ There is also considerable variation between courses. Subject areas such as engineering and technology, computer science and business and administration tend to attract a much higher proportion of international students than subjects such as law, humanities and creative arts and design.¹⁵

Universities Scotland have estimated that Scottish HEIs employ 38,450 directly and another 142,000 jobs are supported indirectly, accounting for almost 6% of all jobs in the Scottish economy.¹⁶ Given the large share of the student body that they represent, it is reasonable to assume that international students support a significant

¹³ Audit of higher education in Scottish universities, Audit Scotland, July 2016, www.audit-scotland.gov.uk/report/audit-of-higher-education-in-scottish-universities

¹⁴ <https://www.hesa.ac.uk/data-and-analysis/students>.

¹⁵ For more detail, see the table in the attached annex showing enrolments at HEIs by provider, domicile and subject.

¹⁶ Universities Scotland (2017) *Ten things to know about Scottish Higher Education*: <http://www.universities-scotland.ac.uk/scotlands-universities/>

proportion of those employed in higher education institutions across Scotland as a whole, and that this is more acute in those institutions and in those subject areas with a higher proportion of international students than those with less. There is a direct impact through the need to employ teaching staff, particularly for those subjects with a high proportion of international students, as well as administrative and management roles relating to the recruitment and support of international students and the provision of services such as student accommodation. There is also an indirect impact as any surplus generated by fees from international students and other on-campus expenditure may also support employment in broader teaching, research, management, administrative and other roles in HEIs.

Impact on the wider economy

In addition to fee income, international students contribute to Scotland through other expenditure incurred during their studies, including accommodation and other day-to-day expenses. A number of recent studies have estimated the total value of expenditure by international students to the economy.

In a 2011 study, London Economics used data from the former Department for Innovation, Universities and Skills' (DIUS) Student Income and Expenditure Survey (SIES)¹⁷ to estimate total non-fees spending by full-time international students in the UK, including living expenses, housing, transport, course-related materials and other costs. For Scotland this was estimated to be approximately £441m in 2008-09 (equivalent to £509 million in 2017-18 prices)¹⁸, which represented 10% of the total UK figure.¹⁹ This is higher than Scotland's share of the UK population at around 8.5%,.

Using a different methodology, a report by Oxford Economics in 2017 on the economic impact of UK universities estimated that £5.4 billion of international students' subsistence expenditure funded from abroad was spent off campus across the whole of the UK in 2014–15, generating an estimated £11.3 billion of gross output. This included £42,000 in gross output generated for every EU student and £66,000 for every non-EU international student²⁰ (equal to £44,000 and £69,000 respectively in 2017-18 prices²¹). These figures do not include tuition fees or some other forms of on-campus spending including university accommodation.

Most recently, a study by London Economics for the Higher Education Policy Institute and Kaplan International Pathways published in January 2018 used a different approach to calculate that in 2015-16 the net economic benefit to the UK of

¹⁷ It should be noted that the SIES survey covers only English and Welsh domiciled students. However London Economics believe the level and pattern of expenditure of international students in Scotland is unlikely to be significantly different to that of English/Welsh students. Therefore, they assume that the average non-tuition fee expenditure of an international student is the same as English domiciled students

¹⁸ Calculated using autumn budget 2017 deflators, rounded to the nearest thousand.

¹⁹ Estimating the Value to the UK of Education Exports, Department for Business, Innovation and Skills, June 2011, <https://www.gov.uk/government/publications/education-exports-estimating-their-value-to-the-uk>

²⁰ The Economic Impact of UK Universities 2014-15, Oxford Economics, October 2017, <http://www.universitiesuk.ac.uk/economic-impact>

²¹ Calculated using autumn budget 2017 deflators, rounded to the nearest thousand.

each EU student was £68,000, and £95,000 for each non-EU student, including tuition fees, living costs and other expenditure. The authors noted that these figures may over-estimate the costs of international students in terms of teaching grants, student support and the provision of public services to their dependents, while under-estimating the benefits. The report estimated that the total net economic contribution of international students to the UK in 2015-16 was £20.3 billion. This includes £1.94 billion in Scotland, supporting the 2011 study's suggestion that around 10% of the economic benefit of international students to the UK is in Scotland.²²

Despite the variations in methodology, the consistent message of these analyses is that the net benefit of each international student to the Scottish economy is in the tens of thousands of pounds; that both EU and non-EU students have a positive economic impact despite the different fees and student support arrangements (although the economic contribution of non-EU students is greater); and that the economic benefit of international students to Scotland is higher per capita than it is for the UK as a whole.

²² The costs and benefits of international students by parliamentary constituency, London Economics, January 2018, <http://www.hepi.ac.uk/2018/01/11/costs-benefits-international-students-including-parliamentary-constituency/>

CHAPTER THREE - EDUCATIONAL, SOCIAL AND CULTURAL IMPACT OF INTERNATIONAL STUDENTS

The impact of international students on the educational opportunities for students in Scotland is hard to quantify. However, there is broad consensus among stakeholders in Scotland that exposure to a multicultural and multinational environment in educational institutions brings benefits for students. These include an enriched learning experience and international outlook among home students and graduates. These make an important contribution to ensuring the connectivity of Scotland's economy and society to the global exchange of people, ideas and trade.

For these reasons, employers value students' exposure to an international environment. The British Council reported that 79 per cent of business leaders in the UK said that knowledge and awareness of the wider world was important to them when recruiting undergraduates and 85 per cent said they valued employees that could work with customers, clients and companies from a range of cultures and countries.²³

A survey conducted for the Higher Education Policy Institute in 2015 suggests that students are also aware of the importance of a global outlook for their careers. It showed that 86% of undergraduate students in UK higher education institutions reported that they study alongside international students. For Scotland, the figure was 95%. Three quarters of the respondents to the survey agreed that studying alongside people from other countries "is useful preparation for working in a global environment."²⁴

Scotland's HEIs have taken steps to ensure that they support internationalisation; the evidence suggests with some success. When asked in a survey by the British Council if they thought they had an international outlook, 73 per cent of undergraduate students in Scotland thought they did to some or a large extent compared to 63 per cent of students at university in England.²⁵

It is worth noting that the social and cultural contribution of international students goes beyond the institutions at which they study. Migration in general, including the presence of international students in our communities, enriches our culture and strengthens our society. There is also some evidence to suggest that migrants increase qualities of tolerance, inclusiveness and openness to intercultural learning amongst Scottish citizens.²⁶

²³ Global Skills Gap: Preparing young people for the new global economy, Think Global, 2011, <https://think-global.org.uk/resource/the-global-skills-gap-preparing-young-people-for-the-new-global-economy/>

²⁴ What do home students think of studying with international students? YouthSight survey conducted for the Higher Education Policy Institute and the Higher Education Academy, July 2015, <http://www.hepi.ac.uk/2015/06/25/home-students-think-studying-international-students/>

²⁵ Richer for it, Universities Scotland, September 2013, <https://www.universities-scotland.ac.uk/publications/richer-for-it/>

²⁶ Evidencing the social and cultural benefits and costs of migration in Scotland, Professor Rebecca Kay (CRCEES & GRAMMNet) and Andrew Morrison (CSMP), 2013

Sustainability of educational opportunities

As noted in chapter two, the proportion of international students among institutions and courses varies considerably. Subjects such as engineering and technology, computer science and business administration generally have a high proportion of international students, particularly so at postgraduate level. International students can account for as much as 60-70% or more of those enrolled in some subjects at some institutions. In such cases institutions might not consider it viable to run these courses without the participation of international students. Domestic students therefore benefit from access to a range of courses that might not otherwise be available.

Percentage of international enrolments at Scottish HEIs split by subject and level of study, 2016-17²⁷

Subject area	% of international enrolments			All enrolments		
	Undergraduate	Postgraduate	All levels	Undergraduate	Postgraduate	All levels
(1) Medicine & dentistry	17%	29%	20%	5,720	1,920	7,640
(2) Subjects allied to medicine	8%	19%	11%	22,025	8,140	30,165
(3) Biological sciences	16%	40%	20%	19,410	3,525	22,935
(4) Veterinary science	47%	36%	46%	1,385	160	1,545
(5) Agriculture & related subjects	6%	37%	17%	1,355	770	2,125
(6) Physical sciences	16%	45%	22%	9,085	2,685	11,770
(7) Mathematical sciences	22%	64%	29%	3,685	645	4,330
(8) Computer science	20%	53%	27%	9,205	2,400	11,600
(9) Engineering & technology	18%	54%	26%	15,790	4,830	20,620
(A) Architecture, building & planning	21%	46%	29%	3,965	1,855	5,820
(B) Social studies	21%	44%	25%	16,435	3,905	20,335
(C) Law	11%	43%	20%	5,905	2,520	8,425
(D) Business & administrative studies	20%	64%	34%	22,355	10,105	32,460
(E) Mass communications & documentation	18%	36%	24%	2,365	1,125	3,495
(F) Languages	23%	55%	27%	10,155	1,615	11,770
(G) Historical & philosophical studies	14%	45%	20%	9,215	2,075	11,285
(H) Creative arts & design	14%	48%	19%	10,380	1,835	12,215
(I) Education	2%	12%	8%	6,615	8,625	15,240
(J) Combined	3%	17%	3%	8,075	95	8,165
Total	16%	40%	22%	183,105	58,825	241,935

Some international students may also be recruited to the teaching, research and administrative staff of universities after completing their course. 19% of staff at Scottish institutions were from the EU and 14% from outside the EU, though there is no data available to indicate what proportion of them initially came to Scotland as undergraduate students.

The available evidence strongly suggests that international students in Scotland make a valuable contribution to achieving the Scottish Government's ambition, set out in the International Framework, that our people are better able to engage in a global world; engaged in international exchange and learning opportunities; and are aware of the international environment and Scotland's place in the world.²⁸ International students also play an important role in sustaining the provision of higher education, particularly at a postgraduate level in science and engineering-related subjects.

²⁷ HESA Student Data (SG Analysis). Numbers rounded to nearest 5. Totals and percentages based on unrounded numbers.

²⁸ International Framework, Scottish Government, December 2017, <https://beta.gov.scot/publications/scotlands-international-framework-9781788514033/>

CHAPTER FOUR – IMPACT ON PUBLIC SERVICES AND WIDER ECONOMY

International student demand on public services

A Migration Observatory Briefing of October 2017 reported that international students make less use of healthcare and social services compared to the average UK resident.²⁹ This is to be expected, as access to some forms of social services is limited for non-EU international students, and students are more likely to be on average younger than the general population and less dependent on health and social care services. Student households also tend to have fewer dependents than those in the wider community.

The report published by London Economics on behalf of the Higher Education Policy Institute and Kaplan International Pathways in January 2018 estimated the public costs of hosting international students in 2015-16 to be £19,000 for each EU-domiciled student and £7,000 for each non-EU domiciled student. This estimate included teaching grants and tuition fee support, healthcare, housing, education for dependent children and a range of other public services and is considerably less than the estimated economic contribution of £87,000 for each EU domiciled student and £102,000 for each non-EU international student.³⁰

Impact on tourism and visitor numbers

Oxford Economics estimated that in 2014-15 visitors to international students at HEIs in the UK spent £520 million, with particular benefits for the transport, hospitality, cultural and recreational sectors with secondary benefits to the wider economy. As Scotland accounted for 11% of international students in the UK in 2014-15, that would suggest that visitors to international students in Scotland generated in the region of £57 million in that year.

The analysis published by London Economics in January 2018 estimated that each EU first-year student attracted 3 visits from family and friends at an average spend of £296 per trip, and 0.9 visits by non-EU international students at an average of £822 per trip. Based numbers at Scottish HEIs in 2015-16, that would represent approximately £41 million of spending from visitors to international students in Scotland.

These analyses are based on different methodologies but both suggest that the presence of international students at Scottish educational institutions generates a significant economic benefit for the tourism, hospitality and associated sectors.

²⁹ Migration Observatory Briefing, October 2017, <http://www.migrationobservatory.ox.ac.uk/resources/briefings/>

³⁰ The costs and benefits of international students by parliamentary constituency, London Economics, January 2018, <http://www.hepi.ac.uk/2018/01/11/costs-benefits-international-students-including-parliamentary-constituency/>

Extending influence abroad

International students support the long-term development of Scotland's reputation and influence abroad. Work by the British Council has shown that attending an educational institution is one of the most important cultural activities for developing trust among people from other countries. Students who have studied in the UK are more likely to have a higher level of trust of British people.³¹ A survey by the Department for Business, Innovation and Skills found that 90% of international graduates had an improved perception of the UK as a result of being educated at a UK institution.³²

The Scottish Government's International Policy Statement recognises the value of the diaspora who raise the profile of Scotland and help to promote social, cultural, academic and economic links with other countries. International alumni of Scottish further and higher education institutions who have returned home or moved on to other countries are a valuable part of this diaspora both in terms of their numbers and the fact that they are, almost by definition, highly educated and experienced in living and working in a global context.

Engagement with alumni of Scottish HEIs is an important part of the Scottish Government's internationalisation objectives. The Scottish Government's Trade & Investment Strategy commits to "strengthen engagement with the international university alumni community including the new diaspora of international students who return home as ambassadors for Scotland."³³

Scotland's Saltire Scholarship programme, established in 2009, has sought to attract and engage international students in order to develop an alumni network to support connections between Scotland and priority countries in areas including trade, investment, education and culture. The GlobalScots network, managed by Scottish Enterprise, actively seeks out and works with business leaders and other influential figures with a connection to Scotland, including many who are alumni of Scottish institutions. Members of the network have been instrumental in securing a number of trade and investment successes for the Scottish economy.

The costs incurred in providing public services to international students in Scotland are generally less than those for the wider population, and are significantly outweighed by the benefits that they bring. These benefits include raising the visibility and reputation of Scotland internationally by attracting additional visitors (which also brings direct economic benefits), building trust among those who spend time studying in Scotland, and building a network of well-educated and influential alumni who can support economic, social and cultural links with other countries.

³¹ Trust Pays: How international cultural relationships build trust in the UK and underpin the success of the UK economy, British Council, 2012, <https://www.britishcouncil.org/organisation/policy-insight-research/research/trust-pays>

³² The Wider Benefits of International Higher Education to the UK, Department for Business, Innovation and Skills, 2013, <https://www.gov.uk/government/publications/international-higher-education-in-the-uk-wider-benefits>

³³ Global Scotland – Scotland's Trade & Investment Strategy, Scottish Government, March 2016, <http://www.gov.scot/Publications/2016/03/7779>

CHAPTER FIVE – IMPACT ON THE LABOUR MARKET

Demographic context

As we set out in our recent publication ‘Scotland’s population needs and migration policy: Discussion paper on evidence, policy and powers for the Scottish Parliament’, the dominant feature of Scotland’s history over the last seventy years or so has been out-migration. This is in contrast to the rest of the UK. Throughout the 1950s and 1960s, when England and Wales saw strong in-migration, almost 6% of the population left Scotland in each decade. Scotland also saw population decline throughout the 1970s, 1980s and 1990s whereas the UK as a whole saw almost constant growth in population over this period.

There are projected to be more deaths than births in Scotland in every year going forward. Each year for the next 25 years all of Scotland’s population growth is projected to come from migration. UK Government policy and the impact of Brexit mean that international migration to Scotland is projected to decline, further inhibiting Scotland’s growth.

The age profile of the population will also change, with the proportion of the population of state pension age increasing by 25% in the coming years as the Baby Boomer generation reaches retirement. People aged 75 and over are projected to be the fastest growing age group in Scotland, increasing by 79% over the next 25 years.

The prospect of people in Scotland living longer, healthier lives is welcome, and increasingly many people of state pension age continue to work and contribute to the economy in that way. It is also the case that people in the oldest age categories become more likely to need access to health and social care services to support them in their old age. Those essential public services will require a buoyant working age population.³⁴

Immigration policy

UK Government policy and rhetoric on international students, including their continued inclusion in the Government’s target to reduce net inward migration to the tens of thousands, has been noted in several key markets.³⁵ The impact on Scotland is apparent in the reduction in the number of international students from certain countries. For example the number of Indian entrants fell by 58% between 2010-11 and 2016-17 from 1,985 to 835, and the number of Nigerian entrants has reduced by 61% in the same timeframe, from 1,395 to 550. The decline highlights the vulnerability of Scottish institutions’ ability to attract international students to

³⁴ Further analysis of Scotland’s demographic challenge and the Scottish Government’s position can be found in Scotland’s Population Needs and Migration Policy: A Discussion Paper on the Evidence, Policy and Powers for the Scottish Parliament, February 2018.

<http://www.gov.scot/Publications/2018/02/5490>

³⁵ See for example the description in the Hindustan Times in September 2017 of the UK Government as “the most student hostile government in the world”.

<https://www.hindustantimes.com/columns/planning-to-study-in-the-uk-think-twice/story-jNrz5F3oCITaWNTXvuzUMI.html>

changes that make, or are perceived to make the UK's immigration system more restrictive. Scottish HEIs will have suffered a material loss as a result of the decline in students from such key markets.

Overall, Scottish HEIs have seen a modest increase in both non-EU and EU entrants in recent years, rising by 2% in 2014-15, 1% in 2015-16 and 5% in 2016-17.³⁶ While this is welcome, it contrasts sharply with other countries that are in competition for international students. During the period 2013-14 to 2014-15, the number of international students in higher education in Canada increased by 8% and in Australia by 9%. During the period 2014-15 to 2015-16, the number of international students in higher education in the United States increased by 7%. There is therefore of real concern that Scottish institutions are inhibited in their ability to compete in the global marketplace for international students by a UK immigration regime that is less attractive than that of its competitors, from the cost of applying for visas to arrangements for post-study work.

The UK Government has not yet published its proposals for immigration rules for EU citizens after Brexit. However, should the UK Government adopt more restrictive approach than the current freedom of movement of people, it is reasonable to assume that there will be a decline in number of students from the EU, with the subsequent loss of the economic, educational, cultural and social benefits described elsewhere in this paper.

International students in the workforce

Until recently the UK Government estimated that the number of international students in the UK overstaying their visas each year was as high as 100,000. However, figures published by the Office for National Statistics in August 2017 showed that in fact fewer than 5,000 international students overstay their visas.³⁷ The perceived risks that have driven the current UK Government's policy on student migration and post-study work have therefore been found to be baseless.

Evidence shows that international students are a potentially valuable asset to Scotland's workforce, helping to address the demographic challenges described above. Data from 2012 showed that a higher proportion of graduates from Scotland's universities go into positive destinations of employment or further study within six months than anywhere else in the UK and graduates from Scotland's universities have the highest starting salaries in the UK.³⁸ In 2015-16, of the EU domiciled graduates with confirmed destinations, 87% went on to positive destinations (work, further study or combination of both).³⁹

³⁶ <https://www.hesa.ac.uk/data-and-analysis/students>. Numbers rounded to nearest 5.

³⁷ International student migration research update, Office for National Statistics, August 2017 <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/internationalmigration/articles/internationalstudentmigrationresearchupdate/august2017>

³⁸ Grow, Export, Attract, Support: Universities' contribution to Scotland's Economic Growth, Universities Scotland, September 2013.

³⁹ Comparable data for non-EU qualifiers is not available.

Destination of EU (excluding UK) qualifiers 6 months after graduating from Scottish HEIs⁴⁰

Activity	2011-12	2012-13	2013-14	2014-15	2015-16
UK work	29%	30%	34%	33%	33%
Overseas work	26%	27%	26%	26%	25%
Combination of work and further study	5%	6%	6%	7%	6%
Further study	29%	26%	23%	23%	26%
Positive destination	89%	89%	89%	89%	90%
Unemployed	7%	7%	7%	8%	7%
Other	4%	3%	4%	4%	3%
Negative destination	11%	11%	11%	11%	10%
Total	100%	100%	100%	100%	100%

Scottish Government analysis found that the average EU citizen in Scotland adds £10,400 to government revenue and £34,400 to GDP. There is some evidence that migration generally boosts long term GDP per capita, thereby increasing living standards, through diversity of skills and higher innovation activity.⁴¹

In order to sustain an ageing population, Scotland needs to expand its working age population. All of Scotland’s population growth over the next 25 years is expected to come from migration. International students are a valuable source of talented migrants. However, UK Government policy, driven by assumptions about the risk of students breaching their visa conditions that have now been shown to be incorrect and based on the demography of the UK as a whole rather than differentiated by the needs of its constituent nations, does not allow Scotland to make the best use of this pool of talent. There is broad agreement among stakeholders in Scotland on the need for the re-introduction of a post-study work route to be more inclusive in retaining international students in the workforce after graduation and precedent for a differentiated immigration system that caters for Scotland’s particular demographic and economic needs.

⁴⁰ HESA, Destination of Leavers from Higher Education 2015-16. Omits non-responses. Percentages based on unrounded numbers.

⁴¹ Scotland’s Population Needs and Migration Policy: A Discussion Paper on the Evidence, Policy and Powers for the Scottish Parliament, February 2018. <http://www.gov.scot/Publications/2018/02/5490>

CONCLUSION

The profile of international students at Scottish institutions is different to that of the UK as a whole, with different consequences for the immediate economic, social and cultural impact that they have on their institutions and local communities during their period of study. The potential that they offer to Scotland in terms of longer term migration and economic and social value is also more significant when seen in the light of Scotland's particular demographic and economic challenges.

UK Government's current approach to immigration presents challenges for Scottish educational institutions in attracting international students. The removal of the post-study work route has set Scotland and the UK back relative to the visa offer being made by competitor countries, reflected in the lower rate of growth in international student numbers in Scotland compared to the likes of Australia or Canada.

The UK Government has made clear its intention to withdraw from the European Single Market and the customs union and to end freedom of movement of persons between the UK and the European Union. This is likely to have a significant effect on the number of students from EU countries studying in Scotland in the future. The lack of clarity from the UK Government about its preferred immigration arrangements for EU citizens after Brexit inhibits the ability of educational institutions to plan effectively for the future and creates uncertainty among those EU citizens considering their options about where to study.

While immigration is reserved to the UK Government, the Scottish Government believes that continuing free movement of persons is in the best interests of Scotland and the UK as a whole. We do not believe that a restrictive model which limits free movement is in Scotland's, or the UK's, interests. Furthermore, for migration from outside the EU it is clear that a one-size fits all approach does not meet Scotland's needs. There is a clear case for a differentiated migration system that recognises the different needs across the UK.

There is precedent for a differentiated approach to immigration within the UK: The Fresh Talent initiative, introduced in 2005 by the previous coalition government in Scotland in partnership with the UK Government, allowed international students at Scottish higher education institutions to work in Scotland for two years after graduation.⁴² The post-study work route was subsequently closed by the UK Government in 2012.

There is consensus in Scotland, amongst business, education and across political parties represented in the Scottish Parliament of the importance of the return of a post-study work route. This will make Scotland's offer to international students more attractive relative to competing countries, to allow talented students to remain and contribute to the Scottish economy. The Scottish Government encourages the UK Government to accept the recommendation of the Smith Report to *"explore the possibility of introducing formal schemes to allow international higher education*

⁴² In 2008 Fresh Talent was mainstreamed into the newly-implemented UK points-based immigration system.

*students graduating from Scottish further and higher education institutions to remain in Scotland and contribute to economic activity for a defined period of time.*⁴³

The UK Government launched a “low risk Tier 4 pilot” in July 2016, simplifying the visa application process for international students studying a Masters’ course of 13 months or less at four UK universities (Oxford, Cambridge, Bath and Imperial College London). In December 2017 the UK Government announced that the pilot had been expanded to include a further 23 HEIs from across the UK, including the University of Edinburgh and the University of Glasgow.

While we are pleased that the UK Government has recognised the need to introduce more flexible arrangements for international students to find work after their studies, the Tier 4 pilot falls far short of a full post-study work route visa. We are disappointed at the lack of consultation from the UK Government with either the Scottish Government or Scottish HEIs; that it took over a year for the pilot to be extended; and that it has been extended to such a limited extent. We are concerned at the emphasis on visa refusal rates as the basis for including institutions in the pilot, as this discriminates against smaller and more specialist institutions whose refusal rates are more likely to vary due to the relatively low number of applicants.⁴⁴

In their report on their inquiry into Demography of Scotland and the implications for Devolution, the House of Commons Scottish Affairs Committee stated that “The [UK] Government response makes clear that the UK Government believes that the current system is excellent, and already meets the needs of Scottish universities and the Scottish economy more widely. This position contrasts with the evidence we received during our inquiry into post-study work schemes, and also stands in stark opposition to the views expressed by all of Scotland’s main political parties.”⁴⁵

The Scottish Government encourages the Migration Advisory Committee to recognise the heightened beneficial impact of international students to Scotland relative to the rest of the UK; and to recommend that the UK Government acknowledges the broad consensus across academia, industry and political parties for the need for a migration system that is more conducive to attracting and retaining international students in Scotland.

⁴³ <http://webarchive.nationalarchives.gov.uk/20151202171017/http://www.smith-commission.scot/>

⁴⁴ <https://www.universities-scotland.ac.uk/response-home-office-tier-4-visa-pilot/>

⁴⁵ Demography of Scotland and the Implications for Devolution, House of Commons Scottish Affairs Committee, Second Report of Session 2016-17, November 2016, <https://www.parliament.uk/business/committees/committees-a-z/commons-select/scottish-affairs-committee/inquiries/parliament-2015/demography-devolution-scotland-15-16/>

ANNEX

Enrolments at Scotland's colleges 2016-17 split by college and home area prior to study

College name	Scotland	Other UK	EU	Non-EU	Total Non-UK
Ayrshire College	14,568	42	8	19	27
Borders College	5,019	30	0	0	0
City of Glasgow College	27,083	618	178	1,108	1,286
Dumfries and Galloway College	6,503	76	5	0	5
Dundee and Angus College	18,867	10	5	0	5
Edinburgh College	21,018	57	63	11	74
Fife College	30,929	104	5	10	15
Forth Valley College	14,604	33	18	10	28
Glasgow Clyde College	19,968	6	7	0	7
Glasgow Kelvin College	18,039	0	0	0	0
Inverness College	4,274	5	13	0	13
Lews Castle College	1,659	5	0	0	0
Moray College	3,278	0	0	0	0
New College Lanarkshire	18,968	103	12	5	17
Newbattle Abbey College	143	0	0	0	0
North East Scotland College	19,531	117	83	38	121
North Highland College	7,375	5	0	0	0
Orkney College	3,364	7	5	19	24
Perth College	6,322	5	0	0	0
SRUC Land based	6,272	16	0	0	0
Sabhal Mor Ostaig	804	129	67	132	199
Shetland College	3,919	0	0	0	0
South Lanarkshire College	4,387	5	0	0	0
West College Scotland	24,994	22	46	8	54
West Lothian College	7,116	5	0	5	5
Total	289,004	1,400	515	1,365	1,880

Source: Scottish Funding Council Infact database
Unknown values excluded from table.

Students at Scottish HEIs 2016-17 split by HE provider, level of study and domicile

HE provider	Postgraduate				Undergraduate			
	Other EU	Non-EU	UK	All	Other EU	Non-EU	UK	All
The University of Aberdeen	9%	27%	64%	3,940	23%	6%	71%	10,210
University of Abertay Dundee	19%	14%	67%	390	11%	1%	88%	3,455
The University of Dundee	5%	18%	77%	4,800	6%	4%	89%	10,590
Edinburgh Napier University	21%	16%	63%	2,385	10%	5%	85%	10,525
The University of Edinburgh	16%	39%	46%	10,270	9%	18%	73%	21,640
Glasgow Caledonian University	6%	30%	64%	2,905	4%	3%	93%	13,510
Glasgow School of Art	16%	37%	46%	610	14%	13%	73%	1,590
The University of Glasgow	10%	41%	49%	8,190	12%	8%	80%	20,425
Heriot-Watt University	18%	35%	47%	3,085	6%	14%	80%	7,415
The Open University	0%	0%	100%	470	0%	0%	100%	14,990
Queen Margaret University, Edinburgh	14%	14%	73%	1,750	16%	3%	82%	3,460
The Robert Gordon University	6%	21%	73%	3,465	10%	4%	86%	9,065
Royal Conservatoire of Scotland	14%	25%	61%	315	11%	12%	77%	845
The University of St Andrews	23%	40%	37%	2,080	9%	32%	59%	8,250
SRUC	26%	0%	74%	100	3%	1%	96%	1,520
The University of Stirling	9%	32%	59%	3,480	8%	4%	88%	8,585
The University of Strathclyde	9%	23%	67%	7,365	6%	5%	89%	15,595
University of the Highlands and Islands	4%	6%	90%	665	2%	1%	97%	8,055
The University of the West of Scotland	3%	23%	74%	2,560	4%	3%	93%	13,395
Total	11%	29%	60%	58,825	8%	8%	84%	183,105

Source: HESA Data, SG Analysis

Totals include Open University students; however there are 0 international students at this HEI in Scotland.

Enrolments at HEIs split by country of HE provider, domicile, and level of study 2016-17

Scotland HEIs	EU	Non-EU	UK	Total
Postgraduate	11%	29%	60%	58,825
Undergraduate	8%	8%	84%	183,105
Total	9%	13%	78%	241,935
Rest of UK HEIs	EU	Non-EU	UK	Total
Postgraduate	8%	27%	65%	492,770
Undergraduate	5%	9%	86%	1,583,175
Total	5%	13%	81%	2,075,945
UK Total HEIs	Other EU	Non-EU	UK	Total
Postgraduate	8%	27%	64%	551,595
Undergraduate	5%	9%	86%	1,766,285
Total	6%	13%	81%	2,317,880

Source: HESA Data, SG Analysis

Numbers rounded to nearest 5. Totals and percentages based on unrounded numbers.

UCAS Applicant Statistics – as at 30 June Deadline

Domicile of applicant	Country of Provider	2015	2016	2017	Change between 2016-17
EU (excluding UK)	Scotland	19,290	19,820	19,090	-3.7%
	England	41,330	44,330	42,080	-5.1%
	UK	48,930	51,850	49,250	-5.0%

Source: UCAS: Applicant Statistics – 30th June Deadline – 2017 Cycle

Note: Applicants can make up to five applications

UCAS Acceptance Statistics

Domicile of applicant	Country of Provider	2015	2016	2017	Change between 2016-17
EU (excluding UK)	Scotland	4,245	4,650	4,175	-10%
	England	23,380	24,840	24,565	-1%
	UK	29,300	31,350	30,700	-2%

Source: UCAS: End of Cycle - 11th December – 2017 Cycle

HESA student numbers

The University of Edinburgh accounts for 16.8% of Scotland's EU domiciled students.

The University of Glasgow accounts for 14.6% and The University of Aberdeen, 12.0%.

EU domiciled enrolments are most likely to be enrolled on 'Business & administrative studies' (17.3%) and 'Biological Sciences' (11.9%) subjects.

Enrolments at Scottish HEIs split by HE provider, subject, and domicile of student 2016-17

HE provider	Subject area	Other EU	Non-EU	UK	Total
The University of Aberdeen	(1) Medicine & dentistry	4%	12%	84%	1,105
	(2) Subjects allied to medicine	17%	12%	72%	775
	(3) Biological sciences	33%	6%	60%	1,805
	(5) Agriculture & related subjects	17%	17%	83%	30
	(6) Physical sciences	13%	14%	73%	1,190
	(7) Mathematical sciences	33%	10%	62%	105
	(8) Computer science	36%	17%	48%	210
	(9) Engineering & technology	11%	23%	66%	1,580
	(A) Architecture, building & planning	11%	0%	89%	45
	(B) Social studies	39%	9%	52%	1,555
	(C) Law	17%	17%	67%	1,090
	(D) Business & administrative studies	27%	27%	45%	865
	(E) Mass communications & documentation	33%	33%	33%	15
	(F) Languages	29%	11%	60%	755
(G) Historical & philosophical studies	15%	10%	75%	855	
(H) Creative arts & design	27%	4%	70%	280	
(I) Education	3%	2%	95%	1,855	
(J) Combined	0%	0%	100%	40	
The University of Aberdeen Total		19%	12%	69%	14,150
University of Abertay Dundee	(2) Subjects allied to medicine	2%	0%	96%	225
	(3) Biological sciences	12%	1%	87%	940
	(5) Agriculture & related subjects	8%	0%	93%	200
	(6) Physical sciences	8%	8%	88%	120
	(8) Computer science	11%	4%	86%	700
	(9) Engineering & technology	38%	0%	63%	160
	(B) Social studies	10%	1%	90%	335
	(C) Law	10%	0%	90%	105
	(D) Business & administrative studies	15%	5%	79%	585
	(H) Creative arts & design	9%	3%	88%	445
(I) Education	0%	14%	86%	35	
University of Abertay Dundee Total		12%	2%	86%	3,845
The University of Dundee	(1) Medicine & dentistry	2%	18%	79%	1,335
	(2) Subjects allied to medicine	2%	4%	94%	4,240
	(3) Biological sciences	16%	5%	78%	1,005
	(5) Agriculture & related subjects	0%	0%	100%	5
	(6) Physical sciences	9%	9%	81%	480
	(7) Mathematical sciences	9%	6%	83%	175
	(8) Computer science	14%	7%	78%	430
	(9) Engineering & technology	11%	15%	74%	600
	(A) Architecture, building & planning	16%	17%	67%	350
	(B) Social studies	8%	5%	87%	910
	(C) Law	7%	23%	70%	795
	(D) Business & administrative studies	11%	35%	54%	820

	(E) Mass communications & documentation	2%	2%	98%	235
	(F) Languages	10%	3%	87%	630
	(G) Historical & philosophical studies	2%	3%	94%	500
	(H) Creative arts & design	5%	3%	93%	1,335
	(I) Education	1%	2%	97%	1,550
	(J) Combined	-	-	-	0
The University of Dundee Total		6%	9%	85%	15,390
Edinburgh Napier University	(2) Subjects allied to medicine	3%	1%	96%	2,555
	(3) Biological sciences	12%	4%	85%	1,355
	(5) Agriculture & related subjects	17%	0%	83%	175
	(8) Computer science	16%	4%	81%	1,655
	(9) Engineering & technology	12%	11%	77%	1,170
	(A) Architecture, building & planning	7%	7%	86%	470
	(B) Social studies	6%	1%	93%	530
	(C) Law	0%	0%	100%	230
	(D) Business & administrative studies	19%	17%	64%	3,145
	(E) Mass communications & documentation	11%	4%	85%	460
	(F) Languages	18%	2%	80%	300
	(H) Creative arts & design	14%	5%	81%	860
Edinburgh Napier University Total		12%	7%	81%	12,910
The University of Edinburgh	(1) Medicine & dentistry	6%	13%	81%	2,070
	(2) Subjects allied to medicine	14%	18%	68%	995
	(3) Biological sciences	16%	19%	64%	3,150
	(4) Veterinary science	4%	41%	55%	795
	(5) Agriculture & related subjects	8%	15%	77%	370
	(6) Physical sciences	16%	17%	67%	2,245
	(7) Mathematical sciences	18%	28%	54%	775
	(8) Computer science	34%	35%	31%	1,420
	(9) Engineering & technology	19%	30%	51%	2,025
	(A) Architecture, building & planning	10%	50%	41%	1,045
	(B) Social studies	9%	34%	57%	3,520
	(C) Law	9%	26%	65%	1,425
	(D) Business & administrative studies	8%	46%	46%	2,010
	(E) Mass communications & documentation	17%	33%	50%	90
		(F) Languages	10%	18%	72%
	(G) Historical & philosophical studies	7%	17%	77%	3,000
	(H) Creative arts & design	10%	16%	74%	1,410
	(I) Education	2%	17%	81%	1,885
	(J) Combined	3%	16%	82%	820
The University of Edinburgh Total		11%	25%	64%	31,910
Glasgow Caledonian University	(1) Medicine & dentistry	0%	0%	100%	35
	(2) Subjects allied to medicine	3%	6%	91%	5,530
	(3) Biological sciences	9%	5%	87%	1,235
	(6) Physical sciences	6%	12%	82%	170
	(7) Mathematical sciences	-	-	-	0
	(8) Computer science	12%	5%	83%	1,200
	(9) Engineering & technology	3%	13%	84%	1,690

	(A) Architecture, building & planning	2%	9%	88%	1,025
	(B) Social studies	2%	0%	97%	1,030
	(C) Law	3%	3%	97%	180
	(D) Business & administrative studies	5%	12%	83%	3,660
	(E) Mass communications & documentation	8%	1%	91%	385
	(F) Languages	9%	0%	91%	55
	(H) Creative arts & design	5%	19%	76%	185
	(I) Education	0%	40%	60%	25
Glasgow Caledonian University Total		5%	8%	88%	16,415
Glasgow School of Art	(2) Subjects allied to medicine	0%	20%	80%	25
	(9) Engineering & technology	25%	25%	50%	20
	(A) Architecture, building & planning	16%	26%	58%	510
	(H) Creative arts & design	14%	18%	68%	1,590
	(I) Education	9%	18%	73%	55
Glasgow School of Art Total		15%	20%	66%	2,195
The University of Glasgow	(1) Medicine & dentistry	5%	16%	79%	2,565
	(2) Subjects allied to medicine	11%	8%	82%	1,115
	(3) Biological sciences	14%	11%	75%	3,130
	(4) Veterinary science	3%	44%	54%	710
	(5) Agriculture & related subjects	3%	21%	76%	145
	(6) Physical sciences	15%	7%	78%	1,875
	(7) Mathematical sciences	15%	12%	73%	690
	(8) Computer science	29%	14%	57%	985
	(9) Engineering & technology	15%	22%	63%	1,960
	(A) Architecture, building & planning	8%	29%	63%	190
	(B) Social studies	16%	26%	58%	2,575
	(C) Law	10%	11%	79%	1,290
	(D) Business & administrative studies	11%	59%	30%	2,395
(E) Mass communications & documentation	7%	53%	40%	75	
(F) Languages	12%	6%	82%	2,090	
(G) Historical & philosophical studies	9%	8%	82%	2,625	
(H) Creative arts & design	9%	13%	77%	1,395	
(I) Education	3%	8%	89%	2,805	
The University of Glasgow Total		11%	18%	71%	28,615
Heriot-Watt University	(3) Biological sciences	7%	8%	86%	1,025
	(5) Agriculture & related subjects	18%	32%	55%	110
	(6) Physical sciences	19%	6%	75%	855
	(7) Mathematical sciences	6%	33%	61%	850
	(8) Computer science	12%	12%	76%	420
	(9) Engineering & technology	9%	18%	73%	2,675
	(A) Architecture, building & planning	8%	17%	75%	625
	(B) Social studies	7%	18%	76%	225
	(C) Law	0%	10%	90%	50
	(D) Business & administrative studies	8%	28%	64%	2,235
	(F) Languages	10%	45%	45%	735
(H) Creative arts & design	6%	8%	87%	665	
(I) Education	14%	0%	86%	35	

Heriot-Watt University Total		9%	20%	71%	10,500
The Open University	(2) Subjects allied to medicine	0%	0%	100%	375
	(3) Biological sciences	0%	0%	100%	2,000
	(6) Physical sciences	0%	0%	100%	535
	(7) Mathematical sciences	0%	0%	100%	535
	(8) Computer science	0%	0%	100%	830
	(9) Engineering & technology	0%	0%	100%	905
	(B) Social studies	0%	0%	100%	1,325
	(C) Law	0%	0%	100%	290
	(D) Business & administrative studies	0%	0%	100%	1,215
	(F) Languages	0%	0%	100%	770
	(G) Historical & philosophical studies	0%	0%	100%	825
	(H) Creative arts & design	0%	0%	100%	325
(I) Education	0%	0%	100%	535	
(J) Combined	0%	0%	100%	5,000	
The Open University Total		0%	0%	100%	15,460
Queen Margaret University, Edinburgh	(2) Subjects allied to medicine	14%	9%	77%	2,900
	(3) Biological sciences	13%	1%	86%	345
	(B) Social studies	6%	0%	94%	170
	(D) Business & administrative studies	17%	4%	79%	985
	(E) Mass communications & documentation	26%	1%	72%	425
(H) Creative arts & design	10%	4%	86%	390	
Queen Margaret University, Edinburgh Total		15%	6%	79%	5,210
The Robert Gordon University	(2) Subjects allied to medicine	8%	6%	85%	3,235
	(3) Biological sciences	12%	1%	87%	345
	(6) Physical sciences	13%	5%	85%	195
	(8) Computer science	16%	7%	77%	625
	(9) Engineering & technology	3%	20%	78%	1,075
	(A) Architecture, building & planning	9%	5%	85%	635
	(B) Social studies	4%	2%	94%	925
	(C) Law	3%	13%	84%	785
	(D) Business & administrative studies	11%	12%	76%	3,160
	(E) Mass communications & documentation	17%	8%	75%	575
	(H) Creative arts & design	9%	1%	90%	735
	(I) Education	7%	29%	67%	210
(J) Combined	17%	17%	67%	30	
The Robert Gordon University Total		9%	9%	82%	12,530
Royal Conservatoire of Scotland	(H) Creative arts & design	14%	18%	68%	985
	(I) Education	0%	0%	100%	170
Royal Conservatoire of Scotland Total		12%	16%	73%	1,155
The University of St Andrews	(1) Medicine & dentistry	2%	28%	69%	490
	(2) Subjects allied to medicine	13%	39%	45%	155
	(3) Biological sciences	15%	30%	55%	1,030
	(5) Agriculture & related subjects	0%	50%	0%	10
	(6) Physical sciences	10%	18%	71%	1,340
(7) Mathematical sciences	12%	18%	69%	515	

	(8) Computer science	16%	34%	51%	445
	(B) Social studies	11%	46%	43%	1,830
	(D) Business & administrative studies	22%	56%	22%	655
	(E) Mass communications & documentation	11%	42%	47%	95
	(F) Languages	13%	33%	54%	1,920
	(G) Historical & philosophical studies	9%	34%	57%	1,680
	(H) Creative arts & design	7%	33%	60%	75
	(J) Combined	0%	0%	100%	95
The University of St Andrews Total		12%	34%	55%	10,330
SRUC	(3) Biological sciences	2%	2%	96%	275
	(5) Agriculture & related subjects	5%	0%	95%	715
	(6) Physical sciences	5%	0%	95%	285
	(A) Architecture, building & planning	13%	0%	88%	40
	(D) Business & administrative studies	3%	2%	95%	295
	(I) Education	0%	0%	100%	10
SRUC Total		4%	1%	95%	1,620
The University of Stirling	(2) Subjects allied to medicine	5%	1%	93%	1,980
	(3) Biological sciences	9%	5%	86%	2,175
	(4) Veterinary science	25%	25%	38%	40
	(5) Agriculture & related subjects	19%	38%	43%	105
	(6) Physical sciences	6%	11%	82%	485
	(7) Mathematical sciences	9%	0%	91%	110
	(8) Computer science	16%	10%	75%	440
	(A) Architecture, building & planning	0%	0%	100%	95
	(B) Social studies	6%	4%	90%	1,625
	(C) Law	6%	7%	88%	405
	(D) Business & administrative studies	11%	39%	49%	1,815
	(E) Mass communications & documentation	15%	20%	66%	615
	(F) Languages	10%	13%	77%	600
	(G) Historical & philosophical studies	7%	4%	89%	670
(H) Creative arts & design	-	-	-	0	
(I) Education	2%	11%	87%	825	
(J) Combined	13%	88%	0%	80	
The University of Stirling Total		8%	12%	80%	12,065
The University of Strathclyde	(2) Subjects allied to medicine	4%	14%	81%	1,455
	(3) Biological sciences	6%	2%	91%	1,055
	(6) Physical sciences	8%	6%	86%	1,400
	(7) Mathematical sciences	9%	13%	79%	575
	(8) Computer science	16%	6%	80%	540
	(9) Engineering & technology	9%	16%	74%	5,080
	(A) Architecture, building & planning	25%	16%	58%	510
	(B) Social studies	9%	8%	83%	1,115
	(C) Law	4%	6%	90%	1,375
	(D) Business & administrative studies	12%	27%	61%	3,420
	(E) Mass communications & documentation	11%	11%	77%	220
(F) Languages	6%	2%	94%	630	
(G) Historical & philosophical studies	2%	3%	94%	545	

	(H) Creative arts & design	0%	0%	88%	40
	(I) Education	2%	1%	97%	3,085
	(J) Combined	0%	0%	100%	1,915
The University of Strathclyde Total		7%	11%	82%	22,955
University of the Highlands and Islands	(1) Medicine & dentistry	0%	0%	89%	45
	(2) Subjects allied to medicine	0%	0%	100%	270
	(3) Biological sciences	2%	0%	98%	650
	(5) Agriculture & related subjects	4%	4%	90%	255
	(6) Physical sciences	11%	2%	88%	280
	(8) Computer science	1%	0%	99%	465
	(9) Engineering & technology	2%	3%	95%	970
	(A) Architecture, building & planning	0%	0%	100%	280
	(B) Social studies	1%	0%	99%	1,160
	(C) Law	0%	0%	100%	30
	(D) Business & administrative studies	2%	1%	97%	1,640
	(E) Mass communications & documentation	0%	0%	100%	10
	(F) Languages	4%	3%	91%	340
	(G) Historical & philosophical studies	3%	3%	95%	590
	(H) Creative arts & design	5%	1%	95%	875
	(I) Education	1%	1%	99%	860
University of the Highlands and Islands Total		2%	1%	97%	8,720
The University of the West of Scotland	(2) Subjects allied to medicine	1%	1%	98%	4,345
	(3) Biological sciences	4%	1%	95%	1,420
	(6) Physical sciences	8%	5%	87%	315
	(8) Computer science	6%	6%	88%	1,240
	(9) Engineering & technology	6%	6%	88%	715
	(B) Social studies	1%	0%	99%	1,510
	(C) Law	1%	0%	99%	370
	(D) Business & administrative studies	5%	22%	73%	3,565
	(E) Mass communications & documentation	9%	0%	89%	285
	(F) Languages	0%	81%	19%	80
	(H) Creative arts & design	6%	1%	93%	620
		(I) Education	4%	3%	93%
	(J) Combined	0%	3%	97%	180
The University of the West of Scotland Total		4%	7%	90%	15,955
Total		9%	13%	78%	241,935

Source: HESA Data (SG Analysis)

Numbers have been rounded to the nearest 5. Percentages are based on rounded numbers.

“-“ Has been suppressed for disclosure control.



Scottish Government
Riaghaltas na h-Alba
gov.scot

© Crown copyright 2018

OGL

This publication is licensed under the terms of the Open Government Licence v3.0 except where otherwise stated. To view this licence, visit nationalarchives.gov.uk/doc/open-government-licence/version/3 or write to the Information Policy Team, The National Archives, Kew, London TW9 4DU, or email: psi@nationalarchives.gsi.gov.uk.

Where we have identified any third party copyright information you will need to obtain permission from the copyright holders concerned.

This publication is available at www.gov.scot

Any enquiries regarding this publication should be sent to us at
The Scottish Government
St Andrew's House
Edinburgh
EH1 3DG

ISBN: 978-1-78851-687-7 (web only)

Published by The Scottish Government, March 2018

Produced for The Scottish Government by APS Group Scotland, 21 Tennant Street, Edinburgh EH6 5NA
PPDAS378506 (03/18)

W W W . G O V . S C O T