



Department for
**Employment
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SKILLS
TO SUCCEED

Securing a Sustainable Solution for Higher Education in Northern Ireland: An Options Paper

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FOREWORD FROM THE MINISTER FOR EMPLOYMENT AND LEARNING

Our higher education system is a vital component of our modern, knowledge economy. It supplies the high level skills which companies need to succeed; it maximises the offer of Northern Ireland to new investors; and it stimulates discovery, innovation and knowledge exchange through its world-class research and development.

More widely, higher education changes lives. Open and accessible to anybody with the ability and the will to learn regardless of their background or personal circumstances, it is one of the easiest routes for people to improve their life opportunities and employment prospects. Higher education is a vital catalyst for social mobility, social cohesion, and social change.

But during the course of this Assembly term, a structural under-investment in our higher education system has grown, and has now become unsustainable. A significant funding gap in terms of investment per student has emerged between our local universities and those in other parts of these islands, placing in jeopardy the quality of the Northern Ireland offer relative to other parts of the UK.

Further disinvestment in this outgoing financial year has led to a significant loss in university places, and a subsequent reduction in opportunities for local people to study here.

In addition to impacting on student choice and access, this ongoing instability may have consequences for local companies seeking to grow, and also for our ability to attract new inward investment. The consequences of this disinvestment will become even more acute in the context of a lower rate of Corporation Tax from April 2018 onwards. That determination has the potential to be a game changer for our economy over the course of the next decade, and Invest NI now has the capacity to promote Northern Ireland as an even stronger investment location. But it is incumbent upon us to ensure that we can provide the skills base required to accommodate these new investment opportunities and transform our economy.

I have been clear that the current funding levels for our higher education system are no longer sustainable. Decisions now need to be taken to address this situation.

The Big Conversation was designed to raise awareness of, and seek solutions to, these issues through an innovative and experimental process of public engagement. It concluded in October 2015 and its findings have already helped to inform the budget preparation process for the 2016-17 financial year.

While some limited resources have been made available which may prevent any further cuts to higher education, the funding gap and the effect of recent spending cuts will continue to present a huge challenge to the Executive and Assembly.

A simple restoration of the status quo ante in terms of levels of funding is now no longer tenable. A standstill in the context of a lower rate of corporation tax, and the associated greater demand for high level skills, dictates the need for greater levels of investment in higher education, albeit through a revised system which may be more economically focused.

This document outlines the full spectrum of options available to the Executive to resource higher education, including different mixes of public and individual contributions and different scales of provision. However, all of the models include the funding required to protect the quality of provision – this is treated as a fixed variable.

This paper does not advocate any particular model. Rather, it is intended to aid consideration of these issues by a new Executive after the 2016 Assembly election and inform a decision on what is the preferred way forward. In particular, it is important that all stakeholders are fully informed of the cost implications (and by extension the opportunity costs) of any particular policy position that may be advocated.



Dr Stephen Farry MLA

Minister for Employment and Learning

EXECUTIVE SUMMARY

Funding Challenges

During the course of this Assembly term a structural under-investment in local higher education provision in Northern Ireland has emerged and grown. With tuition fees frozen and public investment reducing, a funding gap of between £900 and £2,500 per student has emerged between Northern Ireland's universities and their counterparts in England, amounting to a total gap of some £39 million in 2014/15.

In addition, significant additional reductions, totalling some £16.1 million, have been passed to local higher education institutions in this outgoing financial year (2015-16). Already significantly under resourced compared to their closest competitors, our universities have managed these reductions, primarily, by reducing their student intakes.

These student place reductions have come at a time when skills forecasts indicate a clear *undersupply* of degree level skills in the Northern Ireland workforce. Addressing that undersupply will present an additional and significant financial pressure.

Challenge	Annual Financial Requirements		
	17/18	18/19	19/20
1. Funding Gap	£39m	£39m	£39m
2. 2015-16 Cuts	£16.1m	£16.1m	£16.1m
3. Expansion Ambitions	£13.1m	£26.2m	£39.4m
Total	£68.2m	£81.3m	£94.5m

The Big Conversation

The Big Conversation was an innovative and experimental process of public engagement designed to raise awareness of, and seek solutions to, the various challenges facing Northern Ireland's higher education system. It took place during September and October 2015 and the responses received have helped to inform the development of a range of options to resource higher education in the future.

Higher Education Funding Options

The options presented include different mixes of public and individual contributions to the costs of higher education. Though they differ in the scale of provision envisaged, each are geared towards providing the requisite funding to, at least, protect the quality of provision at current levels. This paper does not advocate any particular model. Rather, it is intended to aid consideration of these issues by a new Executive after the 2017 Assembly election and inform a decision on what is the preferred way forward.

Option	Additional NI Block Requirements (£m)			Student Contribution (2018/19)
	2017/18	2018/19	2019/20+	
Status Quo	0.00	0.00	0.00	£4,200
Option One: Increased Public Investment				
1a Close Funding Gap and Restore 2014/15 Provision	55.10	55.10	55.10	£4,200
1b Close Funding Gap, Restore 2014/15 Provision and Meet Expansion Ambitions	68.20	88.10	94.50	£4,200
1c Introduce 'Free Fees' and Restore 2014/15 Provision	116.10	116.10	116.10	£0
Option Two: Increased Student Contributions				
2a Close Funding Gap and Restore 2014/15 Provision	0.00	0.00	0.00	£6,500
2b Close Funding Gap, Restore 2014/15 Provision and Meet Expansion Ambitions	0.00	0.00	0.00	£7,500
2c Demand Driven Expansion	0.00	0.00	0.00	£9,000
Option Three: Increased Public Investment and Student contributions				
3a Close Funding Gap and Restore 2014/15 Provision	27.55	27.55	27.55	£5,500
3b Close Funding Gap, Restore 2014/15 Provision and Meet Expansion Ambitions	34.10	44.05	47.25	£6,000

1. CONTEXT

1.1. The Role of Higher Education

1.1.1. Skills Provision

With relatively few natural resources available to us in Northern Ireland, the most important resource we have at our disposal to grow our economy is our people and their skills. Our universities and further education colleges are our key partners in the provision of higher level skills and in 2013/14 they produced nearly 21,000 higher level qualifications.¹

Invest NI already promotes Northern Ireland to potential investors first and foremost with reference to the quality of our graduates and their skills. Northern Ireland is the leading UK region for attracting inward investment outside of London and time and again companies cite our highly skilled workforce and the strength of our higher education system as integral in their decisions to invest in the region.

Indeed, the recent determination of a date (April 2018) and a rate (12.5%) for a lower level of corporation tax, as agreed under *A Fresh Start*,² could be a potential game-changer for our economy, sending out a clear message to investors that Northern Ireland is open for business.

Our higher education system, and the highly skilled workforce which it supports, is therefore vital for our growth narrative under a lower corporation tax environment as we seek to maximise the new investment opportunities which it will bring.

¹ See DEL, [‘Qualifications gained at UK Higher Education Institutions: Northern Ireland analysis 2013/14’ \(2015\)](#) and [‘Further Education Activity in Northern Ireland: 2009/10 to 2013/14 \(2015\)](#).

² See [‘A Fresh Start: The Stormont Agreement and Implementation Plan’ \(2015\)](#)

1.1.2. Commercial Impact

Beyond the provision of skills, our universities and colleges make significant contributions to our economy in terms of creating jobs, generating spending, and contributing to our gross value added. They make these contributions both directly through their own activities and also indirectly when they stimulate economic activity in other industries.

In 2012/13 Northern Ireland's higher education institutions and their students generated over £1.6 billion of spending in the Northern Ireland economy, supported over 18,000 jobs, and contributed nearly £890 million to Northern Ireland's gross value added (figure 1).³

Figure 1 - Economic Impact of NI HEIs and their Students in 2012/13

	Direct Impact in NI	Indirect Impact in NI	Total Impact in NI
Employment Generated	6,170	11,966	18,136
Output Generated (£m)	502.9	1,120.7	1,623.6
Contribution to GVA (£m)	343.4	545.5	888.9

³ See [Viewforth Consulting, 'The economic impact of higher education on the Northern Ireland economy' \(2015\)](#).

1.1.3. Research & Development, Innovation and Knowledge Exchange

In the latest UK-wide assessment of research quality, the Research Excellence Framework 2014, some 70% of research submitted by Northern Ireland universities was rated as 'world leading' or 'internationally excellent'. In several research categories, such as Law, Art & Design and Agriculture, Veterinary and Food Science, Queen's or Ulster University were assessed as being in the top five UK universities, and Queen's achieved the highest rating in the UK in Anthropology and Development Studies.⁴

These research activities drive growth and improvement in a wide range of industries. Companies regularly contract universities, or work collaboratively with them, to undertake research to identify ways in which they can improve their efficiency and productivity. Universities also offer important services through hiring out their world class facilities and equipment to third parties.

Through various commercial interactions with businesses and wider communities, Northern Ireland's universities now secure over £90 million per year in funding. In the wider UK context, this income from business and community interaction represents 2.4% of the UK total, which is a strong performance, given that Northern Ireland accounts for 2.2% of UK Gross Value Added.⁵

Northern Ireland's higher education providers have also generated hundreds of new spin-out companies, helping them to commercialise their activities and contribute to the economy. These companies are normally set up to exploit the Intellectual Property that has originated through the universities' research. In 2013/14 there were 51 spin-out companies still active after 3 years in Northern Ireland, which represented over 5% of the UK total.⁶

⁴ See <http://www.ref.ac.uk/>.

⁵ See ['Higher Education – Business and Community Interaction Survey 2013-14: Northern Ireland Analysis' \(2015\)](#).

⁶ See ['Higher Education – Business and Community Interaction Survey 2013-14: Northern Ireland Analysis' \(2015\)](#).

1.1.4. Social Mobility

Our higher education system does more than fuel our economy. Our universities and colleges are open to everybody with the ability and the will to learn – whatever their background and whatever their circumstances.

Skills and qualifications are one of the surest ways for people to improve their life opportunities and employment prospects. In 2014, the employment rate amongst people with ‘degree level’ or ‘other tertiary’ level qualifications, such as those provided in Northern Ireland’s further education colleges, was over 80%, which was significantly higher than the Northern Ireland average. People with degree level qualifications in Northern Ireland also earned, on average, roughly 50% more than the Northern Ireland average.⁷

Almost half of our young people are now entering higher education, and a higher proportion of them are coming from disadvantaged backgrounds than any other part of the UK. This is a testament both to the inclusivity of our higher education system and to the ability of our people.⁸

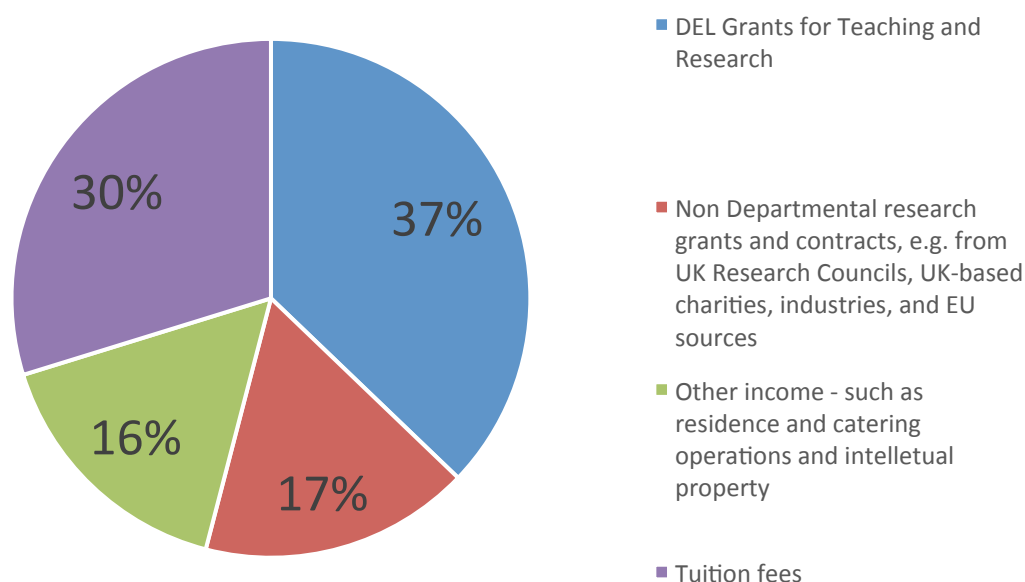
⁷ See [Ulster University Economic Policy Centre, ‘The Northern Ireland Skills Barometer: Skills in Demand’ \(2015\)](#).

⁸ See [DEL, ‘Performance Indicators in Higher Education: Northern Ireland Analysis 2013/14 \(Part 1\)’ \(2015\)](#).

1.2. The Funding of Higher Education

As autonomous organisations, our universities have a wide variety of income streams. In 2013/14 Northern Ireland's higher education institutions received income of about £523 million. The majority of this funding (67%) came from two main sources: public investment in the form of grants paid through the Department for Employment and Learning (the Department); and private investment in the form of tuition fees from students.

Figure 2 - Sources of Income for NI HEIs (2013/14) (HESA)



In 2013/14, grants paid through the Department made up 37% of the income of Northern Ireland's higher education institutions, making them more reliant on this type of direct public funding than the rest of the UK. Totalling close to £200 million per year, these grants are paid for two main reasons: teaching (approximately 73% of the grant allocation); and research (approximately 27% of the grant allocation).

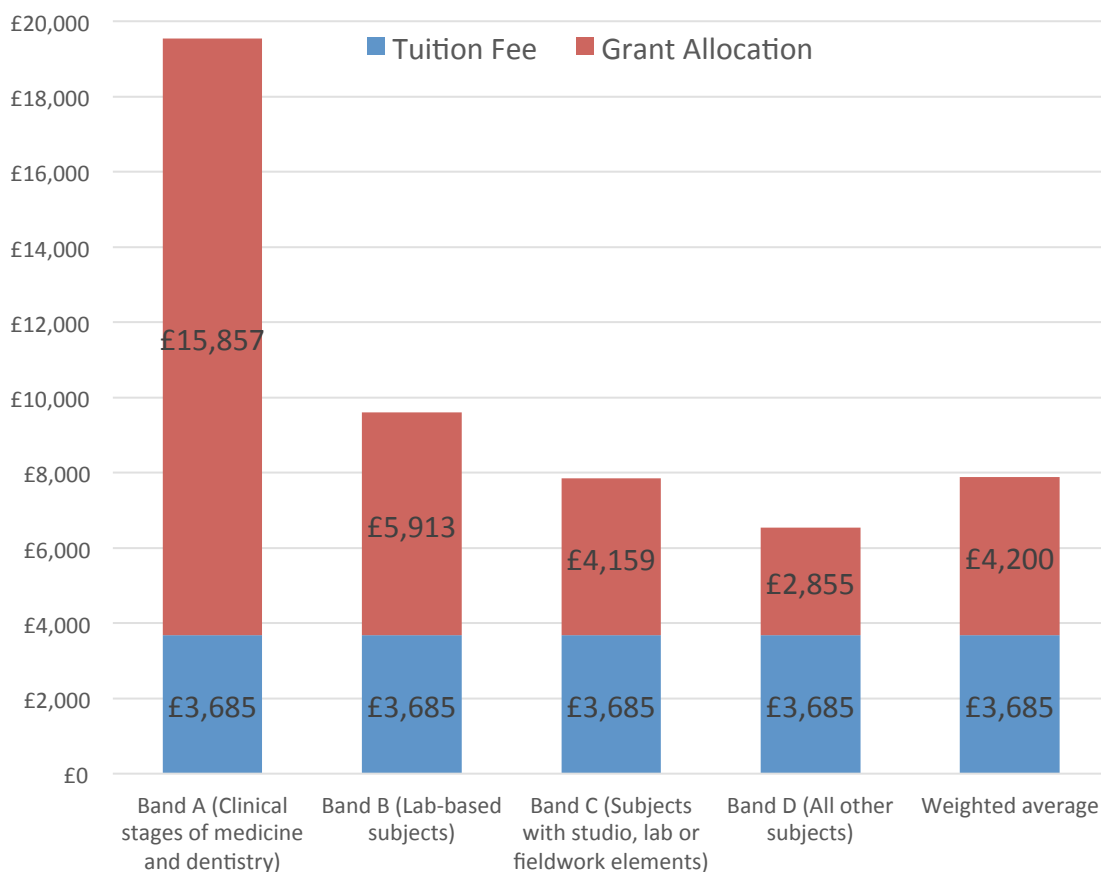
The teaching grant corresponds to the number of students being taught at an institution and the subjects those students are taking, with different subjects attracting different levels of resource. Meanwhile the research grant is paid with reference to the quality of an institution's research output, and this funding can in

turn help institutions to attract research grants and contracts on a competitive basis from other non-Departmental sources, indicated in red above.

In 2013/14, tuition fee income made up 30% of our higher education institutions' income sources. Set at £3,000 per year for locally domiciled full-time undergraduate students in 2006, fees have not risen beyond inflation every year since. In the current academic year they have been set at £3,805.

For their teaching activities, universities are almost exclusively dependent on grants from the Department and tuition fees from students. The total resource provided per student varies depending on the subject area, as shown below, and the average⁹ amount received across bands B, C and D in 2014/15 was just under £8,000.

Figure 3 - Total Teaching Resource by Subject Band (2014/15)



⁹ The vast majority of students fall under bands B, C and D.

2. FUNDING CHALLENGES

2.1. The Funding Gap

Over the last number of years, a clear funding gap has emerged between Northern Ireland universities and those in other parts of the UK.

In the 2011/12 academic year our universities were funded for their teaching activities in much the same way as English universities, through a combination of tuition fees of just over £3,000 per student and grant funding provided by government. However, in 2012 tuition fees were nearly trebled in England to a maximum level of £9,000, grant funding from government reduced, and the net effect was a significant injection of additional finance into the higher education sector.

In Northern Ireland it was determined in the last Programme for Government to keep tuition fees frozen, subject only to inflationary uplifts, over the course of this Assembly term.¹⁰ At the same time, during the course of this decade, grant funding from government has reduced as our universities have been asked to manage significant efficiency savings. Between 2009/10 and 2014/15, annual block grant allocations from the Department to our universities have reduced from £214m to £185m, about 13% in cash terms and 24% in real terms.

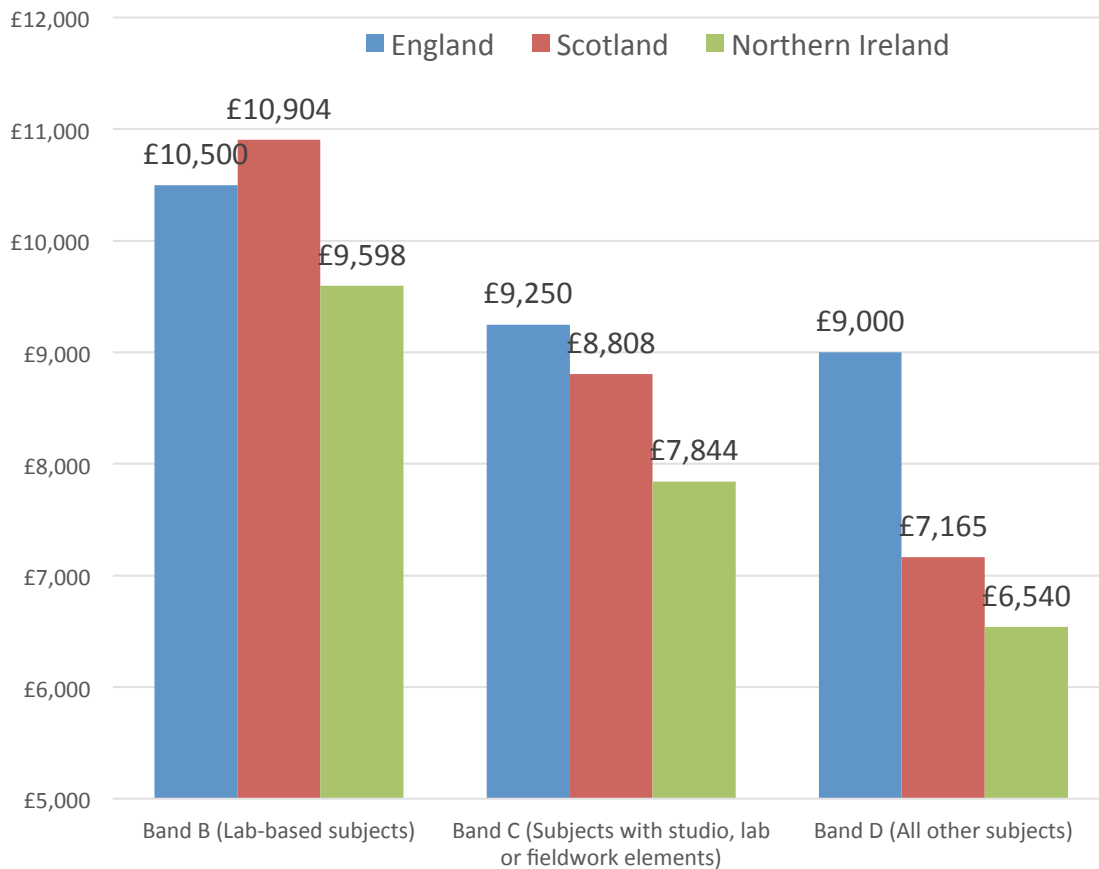
With tuition fees frozen and grant funding reducing, the total 'unit of resource' per student has reduced significantly in recent years. Meanwhile other parts of the UK have increased their levels of investment in this regard.

By 2014/15, across the vast majority of subjects, Northern Ireland's universities were receiving, approximately, between £900 and £2,500 less resource per full-time undergraduate student compared to their English counterparts and between £600 and £1,300 less compared to their Scottish counterparts (figure 4).¹¹

¹⁰ See [Programme for Government 2011-15](#).

¹¹ Helpful comparisons with Wales are not possible as their funding method is based on credits rather than student places.

Figure 4 - Unit of Resource (Grants + Fees) by Country and Subject Band 2014/15



The only subject grouping under which Northern Ireland universities were funded on par with their English and Scottish counterparts is Band A, but the vast majority of students (over 95%) fall under bands B, C and D.

In total terms, if Northern Ireland's universities had been funded for their teaching activities in 2014/15 in the same manner as their English or Scottish counterparts, they would have received an additional resource of, respectively, £39 million and £22 million for their student intakes.

Our universities are recognised internationally for the quality of their teaching provision and the strength of their research. They, and the supply of highly skilled and talented people they provide, are one of Northern Ireland's most successful selling points for attracting inward investment.¹²

¹² See <https://www.investni.com/invest-in-northern-ireland/why-northern-ireland.html>.

The graduates they produce are not only highly skilled, but equipped with a range of wider employability skills and life experiences which employers seek. Moreover, with the advent of tuition fees, students have increasingly come to regard themselves as paying customers. For them, university should be more than just a doorway to employment; the student experience should be an end in itself which is fulfilling, enriching, and good value for money.

Our universities have a lot to be proud of in this regard. They have a strong record of achievement in reviews of teaching quality and research excellence and, at 89%, they are performing above the UK average with regards to student satisfaction rates.¹³ The proportion of graduates from Northern Ireland achieving first or upper second-class honours degrees sat at 71% in 2013/14,¹⁴ and a higher proportion of graduates from Northern Ireland are in employment six months after graduation than their counterparts from any other part of the UK.¹⁵

Over the past number of years the reputation of Northern Ireland's higher education system, and the quality of its provision, has continued to improve, and the number of higher education students coming to Northern Ireland from other parts of the UK and outside of the European Union has more than doubled over the past ten years, from 2,540 in 2004/05 to 5,370 in 2013/14.¹⁶

While underfunding compared to others is not necessarily the same thing as inadequate funding, our universities operate within a UK-wide higher education market, and they are benchmarked against UK universities in a wide range of performance indicators. They compete against other UK universities not only for the best students and staff from throughout the world, but for competitive funding grants and contracts from external sources.

¹³ See <http://www.hefce.ac.uk/lt/nss/results/2015/>.

¹⁴ See ['Qualifications gained at UK Higher Education Institutions: Northern Ireland analysis 2013/14' \(2015\)](#).

¹⁵ See ['Destinations of Leavers from UK Higher Education Institutions: Northern Ireland analysis 2013/14' \(2015\)](#).

¹⁶ See ['Enrolments at UK Higher Education Institutions: Northern Ireland analysis 2013/14' \(2015\)](#).

The imperative to remain competitive with other UK countries has been recognised and addressed by other devolved administrations in recent years. In 2011 the Scottish Government took steps to identify any emerging funding gap between English universities and their own as a consequence of the new funding regime being introduced in England in that year,¹⁷ and, when returned, they identified a range of measures to close that gap over the course of the last Parliament.

While some of those measures were also taken in Northern Ireland, for example allowing our universities to charge higher tuition fees to students from other parts of the UK, the most significant measure taken in Scotland was an injection of additional public funding into the sector, totalling £135.5 million over the course of the period to 2014-15.¹⁸

Similar measures have not been taken in Northern Ireland. Indeed, the level of public sector resource available for higher education has reduced in the same period. If competitive funding levels cannot be maintained, the quality of local higher education provision will diminish in relation to other parts of the UK, and there is a real risk that Northern Ireland will eventually host a second rate higher education system.

Maintaining a competitive level of unit funding with other UK competitors essentially translates to closing the funding gap with England, as this is where the vast majority of UK universities are based. In 2014/15 this gap equated to £39 million. This gap relates to teaching funding only. There is also a separate funding gap of some £7.4 million relating to research funding.¹⁹

¹⁷ See [‘Report of the Scottish Government – Universities Scotland Technical Group on Higher Education’ \(2011\)](#).

¹⁸ See [SPICe Briefing, ‘Higher Education: Tuition fees and the “funding gap”’ \(December 2011\)](#).

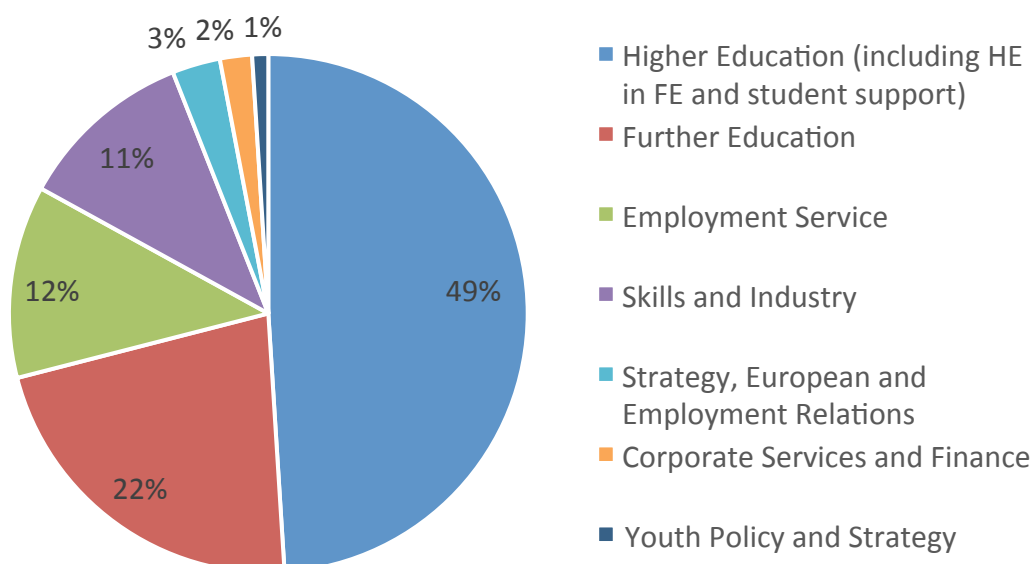
¹⁹ This is derived by expressing Quality-related Research (QR) funding in 2015/16 as a proportion of the population.

2.2. Budget 2015-16 and 2016-17

In addition to this funding gap, there have been further reductions this financial year (2015-16), during which the Department's resource budget was reduced by some £62 million, or over 8%, when excluding Change Fund allocations.²⁰

While the Department sought to prioritise front line further and higher education places as far as possible, it was simply not viable to protect them completely when further and higher education account for such significant proportions of the Department's overall expenditure (figure 5).

Figure 5 - DEL Opening Resource Budget 2015-15 by Division



Furthermore, within the higher education space, any changes to student support arrangements would entail significant legislative lead-in times, as well as clear political consensus. There was therefore inevitably a greater burden on core grant funding for teaching and research as a consequence of the reductions this year.

²⁰ See [Budget 2015-16](#).

In total some £16.1 million was passed to our higher education institutions this academic year (2015/16) in the form of pro rata reductions to their block grants for teaching and research. This has both accentuated the funding gap and had an immediate impact on the number of student places available for local students.

This year Queen’s and Ulster University have admitted over 500 fewer local full-time undergraduate students between them, and that number will rise to the thousands over the next few years.

Figure 6 - Scheduled Full-time Undergraduate Reductions 2015-16 Onwards

HEI	Places 2015-16	Places 2015-16 +	Total Places
Queen’s	290	720	1,010
Ulster	250	1,000	1,250
Total	540	1,720	2,260

Furthermore, the evidence clearly suggests that students from disadvantaged backgrounds will be impacted most of all by reductions in places locally: university places are allocated on the basis of academic merit, and students from higher socio-economic classification groups perform, on average, more highly at school than those from the lower groups.

In the 2016-17 Executive Budget an additional £5 million had been allocated to the new Department for the Economy. In response to concerns from a number of stakeholders, a presentation of many of the issues laid out in this paper, and the imperative to invest more in skills to prepare for a lower rate of corporation tax, an additional amount of £20 million has also been promised for the new Department for the Economy in 2016-17 to support the skills agenda. It has been stated that this will be allocated as part of the June Monitoring Round and be baselined. Of this £25 million, some £14.6 million is planned to support higher education. It is anticipated that these additional allocations will allow higher education funding to be protected, in cash terms, in 2016-17. However, the student place reductions outlined in figure 6 will continue to be implemented, and the structural funding gap will endure.

2.3. Further Ambitions

In addition to these funding deficits, we also have ambitions for growth in higher education. These ambitions will come with a cost.

The Department has commissioned various skills forecasting exercises in recent years and all have revealed a significant and growing demand for higher level skills as we continue to grow our economy around modern, knowledge-based industries. However, the recent determination of a date (April 2018) and a rate (12.5%) for a lower level of corporation tax, and the new investment opportunities that will bring, will place an even greater premium on higher level skills in the future.

Ulster University's Northern Ireland Skills Barometer has taken into consideration these additional skills demands accruing from a lower corporation tax environment and its findings have forecasted significant annual shortages in higher level skills from level 4 upwards.

The shortages at level 6 (undergraduate degree equivalent) and above are most acute in subject areas like Mathematics & Computer Science, Engineering & Technology, and Physical & Environmental Sciences (figure 7).²¹

²¹ See [Ulster University Economic Policy Centre, 'The Northern Ireland Skills Barometer: Skills in Demand' \(2015\)](#).

Figure 7 - Skills Barometer Annual Average Skills Gaps by Subject 2015-2025 Level 6+

Subject Area	Supply	Demand	Gap
Mathematics & Computer Science	495	1,079	-584
Engineering & Technology	350	864	-514
Physical / Environmental	170	386	-216
Creative Arts & Design	405	525	-120
Humanities	219	303	-84
Business & Financial	1,039	1,118	-79
Agricultural Sciences	91	102	-11
Gross Undersupply	2,769	4,377	-1,608
Languages & Cultural Studies	279	277	2
Medicine & Dentistry	358	347	11
Architecture & Related	312	298	14
Mass Communications & Documentation	259	204	55
Medical Related Subjects	1,225	1,171	54
Law	428	373	55
Biological Sciences	506	403	103
Education	796	623	173
Social Sciences	997	535	462
Gross Oversupply	5,160	4,231	929
Net Supply Gap	7,929	8,608	-679

It is therefore clear that our economic growth is going to be increasingly dependent on the provision of higher level skills as we move into a lower corporation tax environment, and even a stand-still in relation to skills provision is not going to be enough to generate the desired step-change in our economy.

The annual average gross undersupply of some 1,600 people with degree level skills or above in our workforce is partially offset by gross oversupply in certain subject areas, such as Education and Social Sciences. There is a clear strategic need to address these subject imbalances and the Department has been engaging with the higher education sector to that end over the last number of years.

All additional places funded over the course of this Assembly term were for economically relevant subject areas only, and universities have been rebalancing their existing provision towards economically Science, Technology, Engineering and Mathematics (STEM) courses as part of the Department's Higher Education Strategy.²² Since 2008 the proportion of their qualifications awarded in narrow STEM areas has increased from 18% to 21.9%,²³ which represents excellent progress towards a goal of 22% by 2020.

However, rebalancing of the scale required cannot happen overnight. Universities structure their provision based on a range of factors beyond economic demand, including, for example, student demand. Subject rebalancing is a long-term process, and there are limits to what can be achieved on a year-by-year basis.

Addressing our gross higher level skills shortages during the 2015-25 period requires immediate action, not least because a typical undergraduate degree takes at least three years to complete. A budget has already been determined for 2016-17 and it will not likely permit any considerable expansion of student places in the 2016/17 academic year. The earliest academic year in which significant additional student places could be introduced is therefore 2017/18, which will begin during the first financial year of a new Comprehensive Spending Review period.

As a typical undergraduate degree lasts at least 3 years, those students will not qualify until at least the summer of 2020, over two years after the planned lowering of corporation tax and half way into the period to which the annual average skills shortages forecasted by the Skills Barometer apply (figure 7).

Securing an additional 1,600 graduates per year from 2020 onwards will require us to sustain three times as many annual enrolments, or 4,800 additional student places, by the 2019/20 academic year.

²² See ['Graduating to Success – a Higher Education Strategy for Northern Ireland' \(2011\)](#).

²³ See ['Statistical First Release: Enrolments and Qualifications at UK Higher Education Institutions: Northern Ireland – 2014/15'](#). 'Narrow' STEM = the physical and biological sciences, mathematics and computer science, and engineering & technology.

There are rationales to increase the local higher education offer beyond skills shortages alone. Northern Ireland already produces significantly fewer graduates, relative to its population, than any other part of the UK (figure 8).²⁴

Figure 8 - Qualifications gained at UK HEIs as a proportion of the population by location of institution (2014/15)

	England	NI	Scotland	Wales	Total
Qualifications gained	616,420	16,010	71,175	41,400	745,005
Population (mid 2014)	54,316,600	1,840,500	5,347,600	3,092,000	64,596,800
Proportion gaining qualifications	1.1%	0.9%	1.3%	1.3%	1.2%
Qualifications per 1,000 population	11.3	8.7	13.3	13.4	11.5

Despite this, university participation rates amongst our young people are actually the highest in the UK, largely because we have a situation where about 30% of them are pursuing their higher education in other parts of the UK each year. Indeed, Northern Ireland is the only net exporter of higher education within the UK,²⁵ and the evidence shows that about two thirds of those who leave do not subsequently return for employment.²⁶

While many of these students can be identified as ‘determined’ to leave, pursuing their first choice destination of study as identified in their UCAS application, there are growing concerns that the number of ‘reluctant’ leavers will increase as places reduce locally. Providing the additional student places required to meet our skills demands under a lower corporation tax environment would greatly improve access for local students to study locally.

²⁴ Source: Higher Education Statistics Agency (HESA) and Annual Mid-year population estimates for the UK, Office for the National Statistics, 2015.

²⁵ See [HEPI Report 72, ‘Whose to lose? Citizens, institutions and ownership of higher education funding in a devolved UK’ \(2015\)](#).

²⁶ See DEL, [‘Destinations of Leavers from UK Higher Education Institutions: Northern Ireland analysis 2013/14’ \(2015\)](#).

In addition, there have been concerns for some time now that Northern Ireland’s higher education presence is concentrated disproportionately in one region, Belfast. In particular, there is a desire to expand higher education provision in the North-West, specifically in Ulster University’s Magee campus. The Business Case for this expansion outlines the need for some 2,600 additional student places there, and the findings of the Skills Barometer have provided further justification for that expansion, provided it is in the right subject areas. The expansion of Ulster University at Magee could, subject to a sound Business Case, potentially be one means to in part accommodate the requirement for additional higher education provision.

Funding the additional places required, under our existing funding system and at levels commensurate with England, would cost some £8,200 per place per annum, resulting in a steady state cost of £39.4 million per year by 2019/20, with our first qualifiers arriving at the end of that academic year. The cost in 2017/18 would be £13.1 million.

Figure 9 - Additional Financial Requirements to Meet Degree Level Skills Demands

	17/18	18/19	19/20	20/21+
Additional Places	1,600	3,200	4,800	4,800
Unit Costs	£8,200	£8,200	£8,200	£8,200
Financial Requirements	£13.1m	£26.2m	£39.4m	£39.4m

These financial requirements relate to our skills shortages at degree level and above (6+) only. Higher level skills shortages at the sub-degree levels (4-5), which are largely the preserve of the further education colleges, are even more acute and meeting them will carry additional financial implications.

2.4. Summary of Funding Challenges

The funding challenges for our universities therefore fall into three main categories. It is important to ensure that the structural funding deficits are resolved before any ambitions for expansion are pursued, so they are displayed below in priority order.

Figure 10 - Summary of Key Funding Challenges

Challenge	Annual Financial Requirements		
	17/18	18/19	19/20
4. Funding Gap	£39m	£39m	£39m
5. 2015-16 Cuts	£16.1m	£16.1m	£16.1m
6. Expansion Ambitions	£13.1m	£26.2m	£39.4m
Total	£68.2m	£81.3m	£94.5m

3. THE BIG CONVERSATION

The Big Conversation was designed to raise awareness of, and seek solutions to, these issues through an innovative and experimental process of public engagement.²⁷ It was an iterative process of awareness raising and consultation, running from 15 September to 23 October 2015, and comprising two main stages.

During the first stage the Department ran informative ‘did you know?’ style surveys to raise awareness about the purpose and importance of higher education. This then built up to a second stage focussing on some of the most critical issues facing Northern Ireland’s higher education system, including its financial sustainability. In the second stage, people were invited to put forward their views on these issues, including how they might be surmounted, through a consultation questionnaire.

Some 120 people participated in the stage one survey and the second stage consultation questionnaire attracted 90 valid responses. In addition, 480 emails were also received as more generalised feedback to the Big Conversation but without addressing any consultation questions in particular.

During the process the Department, the Minister and a range of key stakeholders stimulated discussions in various ways beyond the formal consultation. Meetings, workshops and focus groups were held with stakeholders. Key facts about the higher education system and its impact were disseminated through a range of promotional materials, and various stakeholders, including the universities, promoted the process through their own channels. Social media was also extensively utilised and a live Twitter question and answer session was held on the NI Executive Twitter feed on 16 October in order to engage with a broader audience.²⁸

²⁷ See <https://www.delni.gov.uk/consultations/higher-education-big-conversation>.

²⁸ See <http://niexecutive.blogspot.co.uk/2015/10/transcript-of-employment-minister-dr.html>.

In the final week the Department organised a panel discussion to examine the various models of higher education funding and delivery employed elsewhere. Learning from practice and outcomes in other parts of the world, within and without the UK, was a crucial component of the process which will become more evident in the options considered below. Speakers at the event included a number of experts in the field of higher education policy and funding from different parts of the world, such as Professor Sir Ian Diamond, Vice-Chancellor of Aberdeen University, and Nick Hillman, Director of the Higher Education Policy Institute.²⁹

The public-facing stage of the Big Conversation closed on 23 October and the responses have already helped to inform the budget preparation process for 2016-17. Many constructive and innovative ideas were put forward by respondents, and they have helped to inform the identification of a range of options for the future delivery and funding of higher education in Northern Ireland, outlined below.

²⁹ See <https://www.delni.gov.uk/news/debate-explores-global-approaches-higher-education-funding>.

4. HIGHER EDUCATION FUNDING OPTIONS

4.1. Context

The Big Conversation sought views not only on the ways in which higher education is currently funded, but also on how it can be delivered in the future. The feedback received and the findings of the Skills Barometer have made it clear that in the long-term there is a clear strategic need to: (i) rebalance the subject offerings at our universities; and (ii) encourage more diverse forms of delivery beyond traditional full-time university-based routes.

The Department has been actively pursuing these agendas for some time now, but rebalancing and diversifying higher education provision and delivery are long-term goals, and in the short- to medium-term we will continue to rely heavily on the traditional full-time undergraduate route through university. The options which follow focus on the sustainability issues facing our universities in respect of these traditional forms of provision and they may be grouped into three broad options.

It should be noted that what follows is not an exhaustive list of all of the options open to us or suggested during the Big Conversation, some of which may not be realistically achievable at the present time. For example, one popular option presented by several respondents to the Big Conversation was the introduction of a Graduate Tax to replace the existing system of student loans. Such a tax would circumvent any perceived barriers of student debt while ensuring that the people benefitting from higher education most continue to contribute towards its cost as they do now. In the context of devolved and reserved powers, however, this would require a significant undertaking to have such a power devolved and has not been considered feasible in the short- to medium-term.

Instead, the options presented are restricted to what has been deemed realistically achievable from an early stage in the next Comprehensive Spending Review period. They are all presented in such a way as to demonstrate how they could address the financial deficits outlined above (figure 10).

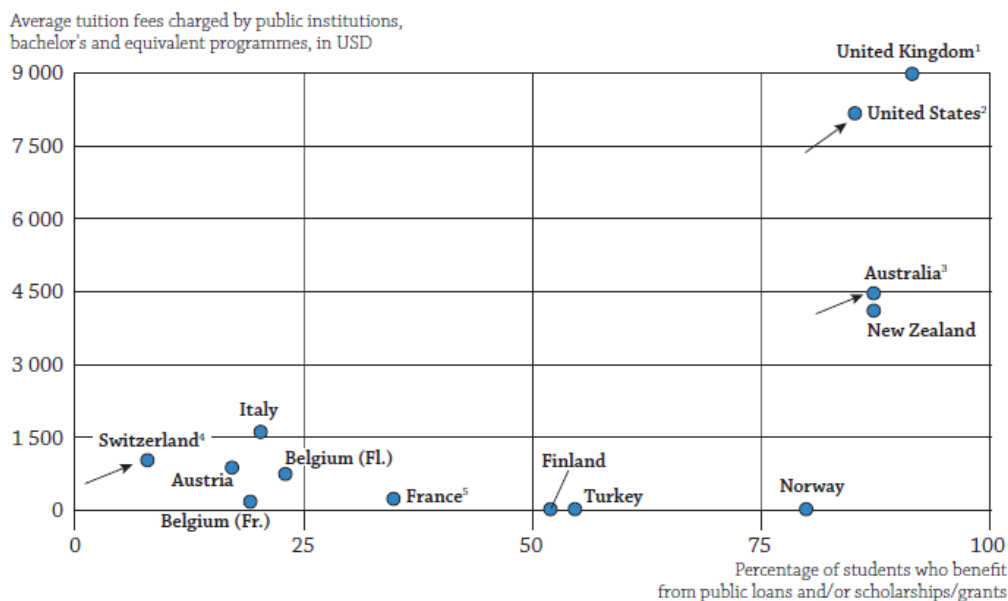
4.2. Option One – Increased Public Investment

While tuition fee levels here have remained low compared to England, and higher education places still rely on significant levels of public funding, it would be misleading to portray Northern Ireland as an outlier in this regard. Indeed, until relatively recently, public higher education systems almost everywhere in the world relied either exclusively or predominately on public funding, provided as grants to higher education institutions from the revenues of general taxation. Even today, about 70% of higher education funding across all OECD countries comes from public sources.³⁰ Average tuition fee levels in England are now in fact the highest of all OECD countries and it is a clear outlier within Europe (figure 11).³¹

Figure 11 - Average tuition fees charged in OECD countries related to the proportion of students who benefit from public student support (2013-14)

Chart B5.1. Average tuition fees charged by public institutions related to the proportion of students who benefit from public loans and/or scholarships/grants at bachelor's and equivalent level (2013-14)

For full-time national students, in USD converted using PPPs for GDP, academic year 2013/14



³⁰ See [OECD, 'Education at a Glance 2014' \(2014\), Table B3.2.c.](#)

³¹ See [OECD, 'Education at a Glance 2015: OECD Indicators' \(2015\).](#)

At the extreme end of the spectrum, the four Nordic countries with available data (Denmark, Finland, Norway and Sweden) charge no tuition fees for full-time students. Through prioritised public funding they sustain higher education systems which are not only free (for students) but also expansive (with high entry rates) and accessible (with high levels of student support for living costs).

After a brief recent experiment with relatively low tuition fees, they have now been abolished in all sixteen German federal states. However university entry rates are also comparably low in Germany and better balanced with vocational training systems. A free but constricted higher education system is therefore maintained.

Within the UK, free higher education for local full-time undergraduate students is a strong policy commitment in Scotland. Relatively high fees are however charged to students from outside of Scotland, including those from other parts of the UK, and Scottish universities perform very well at attracting such students. Places for local students are however necessarily capped according to what the government can afford.

Some measure of student financial contribution has been introduced in many countries in recent years, normally as a measure required to sustain the expansion of their higher education systems in the context of finite (and often reducing) public resources. For example, the Netherlands now has relatively low fees of €2,000 for most Bachelor and Master's programmes. Relatively low student contributions, where they exist, tend to supplement levels of public funding which, while high, could not sustain the desired level of quality and growth on their own.

Models which fund higher education either solely or predominantly through public funding recognise the public benefit or public good dimension of higher education, and are intended to support access for those from poorer backgrounds. They also allow governments to maintain interest and control in system development by virtue of their roles as funders. For example, the Department's regulatory role over universities is underpinned by the financial memoranda which accompany their annual block grant allocations each year, which outline a range of conditions which universities must meet in return for the funding they receive.

The sustainability of systems reliant on public funding does however rest squarely on the assurance that higher education will continue to be a priority spending area from one government to the next, and many countries have found this commitment difficult to protect in recent years. For example, a ‘contribution charge’ has been introduced in the Republic of Ireland to relieve pressure on exchequer funding, and this charge has doubled since 2009. Amidst the economic challenges of recent years, questions have been raised about the long-term sustainability of the higher education system in the Republic of Ireland, and an Expert Group has been established by the Minister for Education and Skills to examine the options for future funding policy.³²

With student places linked so directly to public finances it is also almost always deemed necessary for governments to ration the number of places available under this model. Even when numbers caps are not in place, there are practical limitations to what higher education providers can achieve within fixed budgets set by governments.

This broad option entails a re-commitment to publicly funded higher education in Northern Ireland through an injection of additional funding from the Northern Ireland Block Grant (NI Block). The extent of that re-commitment has been scaled below under several sub-options.

If it were decided to implement any of the options below, it would be preferable to allocate some additional monies on a strategic basis, rather than in their entirety directly through the core grant allocation to our higher education institutions. It would for example be possible to make the funding available through a strategic skills pot, which universities bid for outlining how they will use the resources to meet our skills needs as informed by the Skills Barometer. Similar strategic funding pots have been used in Scotland in recent years, with a view to maximising the impact of additional investment. In Northern Ireland this would help to ensure that additional funding addresses rather than accentuates existing subject imbalances.

³² See <http://www.education.ie/en/The-Education-System/Higher-Education/>.

4.2.1. Option 1a – Close Funding Gap and Restore 2014/15 Provision

Under this option existing tuition fee structures would remain and the structural funding deficits which have emerged in recent years would be closed through additional investment from the NI Block. As outlined in figure 10, this underfunding amounts to £55.1 million per annum.

4.2.2. Option 1b – Close Funding Gap, Restore 2014/15 Provision and Meet Further Expansion Ambitions

Under this option existing tuition fee structures would remain, the structural funding deficits which have emerged in recent years would be closed, and additional funding would be made available to expand provision locally to adequately prepare for a lower corporation tax environment. As outlined in figure 10, this would require additional investment from the NI Block starting at £68.2 million and rising to £94.5 million per year once additional places are fully phased in.

4.2.3. Option 1c – Introduce ‘Free Fees’ and Restore 2014/15 Provision

While the Nordic countries serve as the best exemplars of this approach, Scotland provides the most helpful comparator for Northern Ireland. Like Northern Ireland, the Scottish higher education system operates in a UK-wide market and, crucially, within the same context of devolved and reserved powers.

For example, while the Nordics sustain high levels of public funding under often very different tax structures, Scotland does so under similar structures as our own. This option would therefore entail the emulation of the Scottish model, which offers ‘free’ higher education for locally domiciled full-time undergraduate students.

Given the significant costs involved, it has not been deemed viable to introduce ‘free fees’ and also close the funding gap with England. Nor has it been deemed viable to meet our expansion ambitions to prepare for a lower rate of corporation tax.

Returning to 2014/15 levels of provision will require £16.1 million as outlined in figure 10. In addition, fee levels will have risen with inflation to just over £4,000 by 2017/18. To subsidise those costs for all existing full-time undergraduate students from that year onwards would require, approximately, an additional £100 million, totalling £116.1 million.

4.3. Option Two – Increased Student Contributions

As mentioned above, tuition fees are a relatively new phenomenon in most of Europe. The shift towards financial contributions from students, where it has occurred, has typically been moved by the financial pressures of expanding higher education systems within the context of finite, and often reducing, public resources. The continued expansion of higher education, and its associated costs, was the *raison d'être* for the introduction of tuition fees of £1,000 in the UK in 1998, and for their rise to £3,000 in 2006, and again for their rise in England to £9,000 in 2012. It has also been the driving force behind the introduction of, and increases to, tuition fees in Northern Ireland.

The economic challenges of recent years in particular have moved various other countries to introduce or increase student fees. The 'contribution charge' levied on students in the Republic of Ireland has notably doubled since 2009, from €1,500 to €3,000, as a measure to relieve pressure on exchequer funding, and even countries like Denmark and Sweden have recently introduced tuition fees for international students. The imperative for the introduction or increase of student fees is almost always financial, but the underpinning justification is that individuals accrue significant private benefits from higher education and, as such, should contribute to its costs.

The main concern associated with student fees is whether or not they will hinder access to higher education, particularly amongst those least able to afford them. Fee-based higher education systems therefore work best when they are introduced alongside measures to safeguard access and participation. For example, when variable deferred fees of up to £3,000 were introduced in England, Northern Ireland and Wales in 2006, so too were arrangements whereby institutions had to demonstrate how they would use that additional fee income to widen participation to underrepresented groups. This is a statutory requirement fulfilled in Northern Ireland through the annual preparation of Widening Access and Participation Plans (WAPPs).³³

The most important safeguards for participation and access in countries with student fees are normally their student support systems. Research by the European Commission and the OECD has indicated that the introduction or increase of student fees need not necessarily have a negative impact on participation in higher education, either in total terms or from underrepresented groups, provided it is accompanied by progressive systems of student support.³⁴

This is borne out by the experience of several countries. For example, despite widespread protest leading to their eventual abolition, analysis has shown that the introduction of tuition fees in Germany had no negative impact on participation.³⁵ In Ireland tuition fees were removed in 1996/97 with no demonstrable positive impact on participation in subsequent years;³⁶ by contrast the introduction and increase of the 'contribution charge' in recent years has been accompanied by a rapid increase in student numbers, enabled by the removal of student number controls.

Recent experience in England typifies this trend. We are now in the fourth year of the £9,000 fee system in England, and participation is at a record high, both in total terms and from underrepresented groups.³⁷

³³ See <https://www.delni.gov.uk/articles/higher-education-widening-participation>.

³⁴ See [European Commission, 'Do changes in cost-sharing have an impact on the behaviour of students and higher education institutions?' \(2014\)](#) and [OECD, 'Education at a Glance 2014' \(2014\)](#).

³⁵ [Wigger, B., 'Tuition fees had no negative effect on participation in higher education in Germany' \(2014\)](#).

³⁶ [Denny, K., 'What did abolishing university fees in Ireland do?' \(2010\)](#).

³⁷ [BIS, 'Fulfilling our Potential: Teaching Excellence, Social Mobility and Student Choice' \(2015\)](#).

These participation rates in England are underpinned by a comprehensive student support system, accessed by a greater proportion of students than in any other OECD country (figure 11). Non-means tested student loans are available to cover the full costs of students' up-front tuition fees and repayments are deferred until after graduation. These repayments are income-contingent, taken as a percentage (9%) of the individual's income in excess of a specified earnings threshold (£21,000). A combination of grants and loans is also currently available to support students from England with their living costs. As of next year (2016/17) a maximum maintenance package of over £8,000 per year will be available to new students, but it will be wholly in loan form.

While the levels of student debt now being incurred by students from England is a subject of some public concern, it should be noted that student loans are heavily subsidised, and a significant proportion of all money lent is not expected to be repaid. Any outstanding debt is also written off after 30 years. These high levels of default however raise quite different concerns over the long-term sustainability of the funding system in England.

The student support system in place in Northern Ireland is quite similar, though there are differences in the overall level of finance available, in the main due to the smaller tuition fee regime in place. Other countries which produce strong participation outcomes through a combination of relatively high fees and comprehensive student support systems include: Australia; Canada; New Zealand; and the USA.

This broad option entails an increase in the contributions made by students to the costs of their higher education, scaled under several sub-options. The level of fee increase is underpinned by financial need as identified in previous sections. It should be noted that any changes in student support arrangements entail significant lead-in times for both legislative and administrative reasons, and so it may not be possible to introduce any of these options until 2018/19. In the interim any reinvestment in higher education will need to be met through public sources.

4.3.1. Option 2a – Close Funding Gap and Restore 2014/15 Provision

The funding gap in 2014/15 amounted to £39 million and in the current year that has been compounded by a reduction of £16.1 million. Tuition fee levels for full-time undergraduates would need to increase to a level of approximately £6,500 per year in 2018/19 to close that gap. As higher fees would be introduced for new students only, it would be several further years before the higher fees are fully phased in and the funding gap fully addressed.

4.3.2. Option 2b – Close Funding Gap, Restore 2014/15 Provision, and Meet Further Expansion Ambitions

As outlined in figure 10, this option would require an additional 4,800 enrolments per annum by 2019/20, with an overall additional financial requirement of £94.5m by that time. Supporting expansion of this scale would require tuition fee levels to a level of approximately £7,500 per year by 2019/20.

4.3.3. Option 2c – Demand Driven Expansion

Demand for higher education places is not a static state. A system which truly supports demand-driven expansion must ensure that the number of student places is not restricted through a reliance on finite or unreliable funding sources. As public funding is by nature finite, it cannot be relied on too heavily in truly demand-driven systems. Costs must instead fall, either wholly or predominately, on students themselves.

England has introduced a demand-driven higher education system underpinned by the highest tuition fees in Europe, though some grant funding is still provided for higher cost subject areas. Student number controls for most providers have been removed in the current academic year and a range of measures are being developed to mitigate any potential impact on quality and teaching excellence, including the promised introduction of a teaching excellence framework.³⁸

³⁸ [BIS, 'Fulfilling our Potential: Teaching Excellence, Social Mobility and Student Choice' \(2015\).](#)

A rise in tuition fees in Northern Ireland to levels commensurate with England (max £9,000) would allow for the removal of student number controls and the introduction of a truly demand-driven system. In 2014/15 Northern Ireland universities received a total (i.e. grants plus fees) teaching resource of just under £210 million in respect of their locally (and non-UK EU) domiciled full-time equivalent undergraduate students, who numbered just over 25,000. This translates to an average resource per student of just under £8,500.

In other words, tuition fees of £9,000, as per the English system, coupled with no grant funding whatsoever, would provide *more* overall resource than under the existing system of public grants and tuition fees. It would however be advisable to retain reduced grant funding allocations equivalent to the English subject bands to ensure comparable levels of resource and avoid competitive disadvantage.

This option would not only allow for the expansion of university provision but also for significant savings through the reductions in block grant funding. For example, if local universities had been funded according to the English rates in 2014/15 then they would have attracted block grant funding of approximately £21 million in respect of their locally domiciled full-time equivalent undergraduate students, compared to the £116 million they did receive for that group.

While tuition fees are paid by most full-time undergraduate students through heavily subsidised loans, these costs would not impact upon the NI Block. Both the up-front cost of providing the loans and the subsidy which emerges from their generous repayment terms are covered centrally by Her Majesty's Treasury. The savings in grant funding could be reinvested in other areas of higher education funding, such as research funding, student support, or other targeted interventions.

4.4. Option Three – Increased Public Investment and Student Contributions

The current model used to fund universities in Northern Ireland relies on a balance between direct public funding and tuition fees from students. It may be that it is desirable to maintain this balance and tackle any existing funding deficits through an increase in investment from both sides.

This broad option entails an increase in the contributions made by both government and students to the costs of higher education, with the level of that increase scaled under several sub-options and on the proviso that the additional costs would be met *equally* by both sources. The options are designed to satisfy the various financial needs identified in figure 10.

4.4.1. Option 3a – Close Funding Gap and Restore 2014/15 Provision

This option would seek to address the £55.1 million funding deficit created by the funding gap (£39 million) and the funding reductions for higher education this year (£16.1 million).

Some £27.55 million of additional finance would be required from the NI Block and tuition fees, based on 2014/15 student numbers, would have to rise to a level of about £5,500 by 2018/19 to meet the remaining £27.55 million.

4.4.2. Option 3b – Close Funding Gap, Restore 2014/15 Provision, and Meet Further Expansion Ambitions

As outlined in figure 9, this option would require us to not only solve our existing structural funding deficits but also to support an additional 4,800 enrolments per annum by 2019/20. Supporting expansion of this scale, on top of meeting our existing funding pressures, would require an additional £94.5 million per annum by 2019/20. This would require tuition fee levels to increase to a level of approximately £6,000 per year by 2018/19. This is in addition to additional investment through the NI Block of some £47.25m per year by 2019/20.

4.5. Options Summary

A range of funding options has been presented above, split into three broad categories. They all involve varying levels of additional public funding and varying changes to tuition fee levels in order to meet the funding deficits outlined in figure 10.

Figure 12 - Options Summary

Option	Additional NI Block Requirements (£m)			Student Contribution (2018/19)
	2017/18	2018/19	2019/20+	
Status Quo	0.00	0.00	0.00	£4,200 ³⁹
Option One: Increased Public Investment				
1a Close Funding Gap and Restore 2014/15 Provision	55.10	55.10	55.10	£4,200
1b Close Funding Gap, Restore 2014/15 Provision and Meet Expansion Ambitions	68.20	88.10	94.50	£4,200
1c Introduce 'Free Fees' and Restore 2014/15 Provision	116.10	116.10	116.10	£0 ⁴⁰
Option Two: Increased Student Contributions				
2a Close Funding Gap and Restore 2014/15 Provision	0.00	0.00	0.00	£6,500
2b Close Funding Gap, Restore 2014/15 Provision and Meet Expansion Ambitions	0.00	0.00	0.00	£7,500
2c Demand Driven Expansion	0.00	0.00	0.00	£9,000
Option Three: Increased Public Investment and Student contributions				
3a Close Funding Gap and Restore 2014/15 Provision	27.55	27.55	27.55	£5,500
3b Close Funding Gap, Restore 2014/15 Provision and Meet Expansion Ambitions	34.10	44.05	47.25	£6,000

³⁹ Tuition fee levels will have risen with inflation to £4,020 in 2017/18 and the rates have not yet been set for future years. This value is therefore an estimate only based on previous years' inflationary uplifts.

⁴⁰ Unlike the other options which require changes to tuition fee levels, this option could be introduced more quickly.

5. CONCLUSION

The existing model of higher education funding in Northern Ireland is not sustainable. Under it, our universities are heavily reliant on funding from the NI Block, currently paid through the Department for Employment and Learning, which has not been sustained in recent years at the level required to protect current levels of provision, much less to support the expansion required to prepare for a lower corporation tax environment.

This paper has identified the nature and scale of the funding deficits facing Northern Ireland's higher education system and has outlined a range of options to address them. It has also outlined the additional funding required to support expansion to the scale required to meet our skills needs under a lower rate of corporation tax.

Some of the options entail significant lead-in times and all require political consensus regarding the prioritisation of resources during the course of the next Comprehensive Spending Review period. Securing a sustainable solution for higher education funding will be a key challenge during that period, and this document is intended to aid consideration of these issues by a new Executive after the 2016 Assembly election and inform a decision on what is the preferred way forward.



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