

THE GLASGOW SCHOOL OF ART

THE GLASGOW SCHOOL OF ART: 2030 FORESIGHT PAPER



The following report has been produced by Tom Campbell
For Glasgow School of Art, 2021.

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INTRODUCTION AND CONTEXT

The Glasgow School of Art is undertaking a large-scale review across many aspects of its operations, including an Estates review and a plan for the restoration of the world-famous Mackintosh Building. Central to this review is a major piece of engagement and research, which aims to develop a coherent vision for the GSA, around which GSA staff and partners can jointly work towards achieving over the decade.

This paper has been produced in order to support this review, providing material that can be a starting point for conversations and to help generate strategic discussions with key informants and stakeholders. Over and above this, however, it is also intended to be a stand-alone resource that can be directly used by GSA. While the overall research will include consultation and engagement activities with staff, students and key stakeholders and hence focus on internal factors, this paper is more concerned with the external factors that are shaping the context within which GSA operates. As part of this, it includes drivers of change that might provide opportunities, including routes to funding, which will enable GSA to realise its vision.

The paper consists of two sections and an accompanying appendix. These sections are quite separate and the outcome of two distinct pieces of work, although the scenarios outlined in the first section were informed by the information and data generated by the latter.

Four Scenarios: We have produced four 'scenarios' – short descriptions of an art school in 2030. These are fictionalised texts for an art school of a similar heritage and setting to GSA, and should not in any way be regarded as predictions or strategies that the GSA is actively considering. Rather, they are intended to be provocations – distinct, and quite different, visions of what an art school in 2030 can look like, and to give a sense of the variety of roles, organisational structures and funding models that such an institution might have.

Headline Trends: This section captures many of the headline trends, data, key drivers of change and policy directions that need to be considered as part of its strategic thinking over the next 5-10 years. Drawing on more than 50 sources of evidence and data, the information has been organised across 12 sub-sections, ranging from international student demand through to the climate emergency and digital learning, and aims to provide a snapshot of the rapidly changing sector, shifting policy landscape and market place that GSA and similar HE Institutes are facing. Although this section does include some data directly relating to GSA (such as student demographics), it mainly covers more those external to the School, and which will need to be considered, and navigated, as part of any process to achieving a successful strategic vision for GSA.

Following on from these sections, an appendix describes a number of exemplar institutions and projects that have been identified in the course of the research, and which have been briefly recorded here, to allow for further investigation.

FOUR SCENARIOS FOR 2030

1. The Virtual Art School

The Art School is truly global, with hubs and partners in cities and regions across the world. The traditions and values of the School are embedded in how art and design are being taught and the quality of the educational experience, but not in terms of its actual buildings or location. Courses are predominantly digital, making use of the latest technologies to not only deliver learning content, but also to interact and collaborate. Of particular importance has been the development of immersive reality experiences and a range of tools and techniques both used and, in many cases, pioneered by the School. These have led to new forms of learning in disciplines such as architecture, conservation and heritage, with virtual environments and simulations that form the basis for intensive learning, in which students are taken through and can work remotely but intensively on creative challenges.

The Art School still has its original centre and historic buildings, but its estate is less extensive than before and are mainly used for events, administration and exhibition rather than teaching. The staff are not restricted to or based on the campus, but are increasingly international, operating from research centres and design businesses around the world. As a renowned global brand, whose quality of teaching and innovation is widely recognised, the School attracts more and more of its students from Asia and is able to command considerable revenues from its course fees. There are also growing opportunities for commercial sponsorship and partnerships with leading technology companies.

2. The Mission-Based School

In 2030, the architectural faculty is closed down, following on from the closure of the fine art, design and fashion faculties the previous year. Instead, the Art School is structured almost entirely thematically, with inter-disciplinary learning groups and R&D organised around major societal missions and innovation challenges. After an initial year of core, foundational education in arts and design practices, students choose to progress their studies from a variety of cross-disciplinary challenges. A key element of these further studies is a focus on critical thinking and the application of creative and design methodologies to address complex problems. The challenges are not fixed, but at the moment include: mental health and well-being, the ageing society, the climate crisis, green transport, automation and mobility.

The Art School has significantly expanded and broadened its funding and impact, particularly in terms of research and innovation with increased funding from the industry and private sector as well as funding agencies, and an impressive enterprise programme. Many students are based off-site, working with partners across the UK – and discussions are underway with NHS England about establishing a base linked to a major teaching hospital. Long-term projects undertaken with hospitals, transport providers, local authorities and other partners or 'problem holders' from across public and private sector have brought in revenues and are making significant contributions. In healthcare in particular, design insights and innovations that emerged from projects are being applied at scale and having a direct impact on patient outcomes, while fine art is being effectively used in therapy and mental health treatments.



3. The Community Art School

The Art School is no longer organised around the traditional three-year degree or masters courses, but instead provides a wide programme of modular and part-time learning activities, with considerable variety in the subject matter, format, length of the course and entry requirements. The teaching quality remains as high as ever, but the level of intensity and challenge ranges considerably, from introductory and foundational courses through to apprenticeships with a strong emphasis on practical skills, an extensive programme of executive education as well as highly specialised post-graduate level courses.

Alongside this, there is a comprehensive programme of continuous professional development and adult education that is particularly tailored for local people. A range of fine art and art history courses aimed at older students has been particularly popular. In partnership with the local council, charities, housing associations and hostels, the School has developed award-winning creative learning programmes for those who have experienced homelessness, disability, mental health problems or special education needs. These have proved to be a powerful way of getting marginalised groups into mainstream education and employment.

The student population is large and shifting, with thousands taking short or part-time courses at any one time. Capital funding has enabled the School to increase its estate across the city, expanding its presence and opening up access to local people. It has deepened its relationships with the council and skills and employment agencies, with significant funding and a range of bursaries enabling courses to be run at either low cost, or no cost at all, to students. The Art School is proud of its commitment to inclusivity – not in terms of the diverse backgrounds of its students but also its inter-generational composition, with citizens in their 80s studying alongside teenagers.

4. The Art School as Academy

As the School approaches its 150th anniversary, the foundational disciplines of fine art, architecture, crafts, illustration and decorative design remain central to its purpose. A practice-based curriculum comprises a foundation year followed by three years of studio-based study and exploration. The degree and masters courses are followed by an optional two-years of further practice, in which graduating students are given their own studio space in order to develop their specialist expertise and technical skills to a high level. Many of these will go on to become renowned and award-winning artists and designers, further contributing to the School's reputation for excellence and artistic renown.

Although digital tools are used and taught to students, there is little online provision and the learning experience is very much face-to-face, led by tutors within the studio environment. Yet it would be wrong to describe it as conservative or traditional, and much of the work produced is highly experimental, pushing the boundaries of practice and form. The strength of this reputation is such that it attracts applicants from around the world, but it is still rooted in the European tradition of fine art and is also very much a national institution, such that the majority of its students are drawn from the UK. The student body is relatively small, with entry strictly based on academic results and portfolios and less emphasis on inclusion or widening access programmes, although philanthropic donations mean it is able to offer scholarships to exceptionally talented students from poorer backgrounds. The emphasis on high-quality studio provision means that space is at a premium and options for re-locating to the outskirts of the city are being explored. In recent years, the School has greatly strengthened its fundraising and succeeded in attracting individual donations, growing its alumni network and accessing cultural funds.



HEADLINE TRENDS, DATA AND POLICY

1. The Global Context

Internationalisation has been a defining trend within UK HE over the past decade. This has taken two main forms: admissions of international students into UK institutions; and the export of UK HE programmes overseas. A core enabler for both these forms of internationalisation is the global reputation and demand for UK universities.

From a Feb 2021 House of Commons briefing¹:

- / In 2019/20 there were 538,600 overseas students studying at UK universities; 22% of the total student population
- / 143,000 of overseas students were from the EU and 395,6000 from elsewhere
- / China currently sends the most students to the UK, almost 102,000 in 2019/20; this number has risen by 90% since 2011/12
- / In recent years, the UK has been the second most popular global destination for international students after the US. In 2017 the US took 26% of all higher education students who were studying overseas at universities in the OECD, the UK was in second place with 12%
- / But market share has been slipping and other English speaking countries such as Australia, New Zealand and Canada are now seeing significant increases in overseas students - as are European countries which are increasingly offering courses in English

Growth in total numbers of overseas students at UK HE Institutes:

Academic Year	Number of overseas students at UK HE institutions	% change vs previous year
2019/20	538,600	11%
2018/19	485,645	6%
2017/18	458,520	4%
2016/17	442,750	1%
2015/16	438,515	–

The Impact of Brexit

Data from UCAS² shows 40% year-on-year drop in EU applicants for 2021 undergraduate admissions at UK universities.

Jan applicants for Sept 2021 undergrad admissions	2018	2019	2020	2021
EU	43,510	43,890	43,030	26,010
Non-EU	58,450	63,690	73,080	85,610

The Scotland government has confirmed that new EU students will have to pay tuition fees from the 2021/22 academic year onwards:

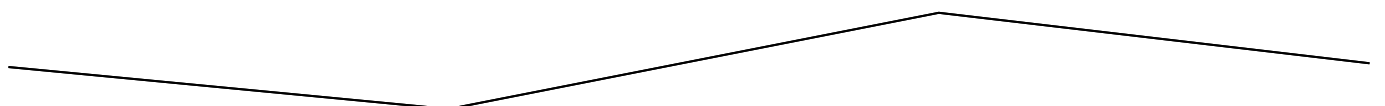
"Richard Lochhead, the minister for further education, higher education and science, said the move was a direct result of Scotland being forced out the EU... Under previous arrangements tuition fees in Scotland were fully subsidised by the Scottish government for all EU students except for those from elsewhere in the UK."

Transnational Education

Transnational Education (TNE) is the "delivery of an educational award in a country other than that in which the awarding body is based." An example of TNE is GSA's partnership with the Singapore Institute of Technology. This partnership involves local delivery in Singapore of part of GSA's BA in Communication Design and Interior Design.

Universities UK identifies the following TNE models: "online/distance learning through local delivery partnerships (e.g. franchised delivery, joint and dual degrees, twinning arrangements, validation arrangements) or through a UK institution's physical presence in another country (e.g. branch campus, study centre or through flying faculty)."

TNE has been a transformational movement for UK education providers. A report³ by Universities UK says that 84% of UK universities are engaged in TNE programmes. According to the UK Government's International Education Strategy⁴, such activities generated almost £1.8 billion in 2016.



2. The Local Impact of Higher Education

There has been a recent increase in debate about the more traditional civic role of higher education institutions. In 2018-19, the UPP Foundation ran the Civic University Commission, examining the economic, social and cultural role that universities play in the towns and cities they are part of. Since then, over 60 of UK's universities have signed up to create a Civic University Agreement

"Universities have an irreplaceable and unique role in helping their host communities thrive – and their own success is bound up with the success of the places that gave birth to them."

– Lord Kerlake, Chair of the Civic University Commission

Following on from the Commission, the Civic University Network has been founded and is led by Sheffield Hallam University. Its role is to embed civic aspirations at an institutional level and work with partners to ensure that a university's geographic role and responsibility is used to drive positive societal change.

In several city regions, university students, teachers and staff make up around 10% of the population. A Universities UK study⁵ found that in 2011-12 the sector generated over 73 billion of output, including 2.8 percent of UK GDP, and 2.7 percent of all employment.

The Glasgow city region has the largest student population in Scotland and the second highest in the UK. More than 133,000 students from 135 countries live and study in Glasgow.

The National Council of Universities and Business undertakes an annual survey of university-business interactions. Their 2020 report⁶ notes:

- / 85,000 interactions between universities and SMEs across the UK annually
- / Nearly £400m investment into University R&D
- / 1700 patents and £144m from licencing annually

3. Creative Industries: Facts and Figures

Headline figures on size of UK Creative Industries from most recent DCMS data⁷:

- / 2.1 million people working within the Creative Industries on either employed or self-employed basis
- / 295,800 UK businesses in the Creative Industries
- / UK Creative Industries contributed £111.7 billion to the UK economy or "almost £13 million to the UK economy every hour"
- / This represents growth of 7.4% on previous year, more than five times larger than growth across the UK economy as a whole and an increase of 43.2% in real terms since 2010
- / Exports of creative services were worth £35.6bn, and imports £17.8bn, generating a substantial surplus

Scotland's Creative Industries

The Scottish Government's 2015 Economic Strategy⁸ identified the Creative Industries as a growth sector. The government has created a Creative Industries Advisory Group and a public agency for the Creative Industries, Creative Scotland.

The Economic Strategy has a particular focus on development of Scotland "as a production centre for screen industries." A new agency – Screen Scotland – launched in 2018, described by the Scottish Government as supporting "support film and TV-makers and screen companies in Scotland to develop and grow, to own more of their IP, create and fulfil more of their own projects and build better networks so they can greatly increase sales nationally and internationally, reaching audiences worldwide."

Most recent data⁹ released from the Scottish Government on the size of its Creative Industries:

- / Employment in the Creative Industries growth sector stood at 90,000 in 2019, accounting for 3.5% of employment in Scotland
- / Total exports from the Creative Industries growth sector stood at £4,045 million in 2018, accounting for 4.8% of Scotland's total exports
- / In 2018, total turnover in the Creative Industries growth sector was £8,339.8 million
- / In 2019, employment in the Creative Industries growth sector was highest in Glasgow City (22,140) and City of Edinburgh (19,075), which comprised 24.6% and 21.2% of employment in this sector respectively



Glasgow's Creative Industries

Some aspects of the Creative Industries in Glasgow:

- / BBC Scotland is headquartered at Pacific Quay, Glasgow
- / Glasgow was designated a UNESCO City of Music in 2008. UNESCO: "Scottish Opera and the Royal Scottish National Orchestra make their home in Glasgow alongside other national organisations including the BBC Scottish Symphony Orchestra, BBC Scotland, National Youth Orchestra of Scotland, Royal Conservatoire of Scotland (RCS) and the Scottish Ensemble"
- / According to Scottish Development International¹⁰: "Glasgow is home to a large digital technology cluster, employing 34,000 people." And additionally: "Tech companies in Glasgow attracted £43 million in venture capital investment during 2020, up 156% from £16.8m in 2019"
- / In 2019, the Glasgow City Innovation District opened. The District is a £500m partnership project involving (among others) University of Strathclyde. Businesses working out of the Innovation District include Channel 4

The Glasgow City Development Plan¹¹ recognises the importance of the creative sector, noting:

- / Glasgow is home to 41% of Scotland's actors, dancers, broadcasters, 38% of its musicians and 29% of its artists and graphic designers
- / The Creative Industries sector is cited as being one of the major sources of employment within the city

Glasgow City Innovation District aims to promote the creation and expansion of firms and jobs by supporting and encouraging collaboration between companies, entrepreneurs, universities, researchers and investors. It acknowledges the role of 'innovative design', with emphasis on contemporary arts such as Trongate 103 studios.

4. Covid: the Creative Industries and Prospects for Recovery

Immediate emergency measures have been available to sustain the Creative Industries during the pandemic. Attention is now moving to more short-term or mid-term measures to address the damage caused by Covid to the sector.

According to a City of London taskforce¹², the future of cities is not simply about restoration, but reorientation towards a changed landscape: "The models adopted in the past by culture and commerce are no longer fit-for-purpose in the post-pandemic economy... people have changed how they work, where they travel to, where they go for entertainment, how they access culture, and how they use technology"

Accelerated Uptake of Digital Connectivity and Content

In the last 12 months, 1.5 million more people have started using the Internet, resulting in 95% of UK population now being online. On average people are spending an extra 13 hours online a week. In 2020, it was predicted that it would take to 2025 for 58% of the UK to have high digital capability. In 2021, 60% of the UK now have this level: five years' worth of progress in one¹³.

According to UNESCO¹⁴, the pandemic forced 90% of museums and galleries worldwide to close their doors in 2020, but many institutions in US/Europe moved to digital: social media, podcasts, online exhibitions, immersive experiences. Some 37% of UK museums and galleries increased their existing digital activities, and 23% started new ones.

Video on demand increased significantly among older age groups. Global videogame revenue surged 20% to \$180 billion in 2020¹⁵.

The growth of immersive technologies¹⁶: The UK is currently Europe's largest market for VR/AR, tapping into what is predicted to become a \$160 billion market. There are currently around 1,250 immersive specialist companies in the UK with particular growth opportunities identified in construction, engineering, manufacturing, entertainment, healthcare, training and transport.



5. UK Creative Industries Employment

The following tables are taken from research produced by the Association of Graduate Careers Advisory Services¹⁷. They show the top occupations in which 2017/18 creative arts students were employed fifteen months after graduating.

UK-domiciled graduates of the Fine Arts

Artists	23.2%
Secondary education teaching professionals	8.3%
Teaching and other educational professionals	5.4%
Marketing associate professionals	5.3%
Arts officers, producers and directors	3.8%
Conference and exhibition managers and organisers	3.6%
Primary and nursery education teaching professionals	3.2%
Photographers, audio-visual and broadcasting equipment operators	3.1%
Archivists and curators	2.8%
Graphic designers	2.5%

UK-domiciled Design graduates

Graphic designers	28.5%
Marketing associate professionals	7.3%
Clothing designers	5.7%
Interior decoration designers	5.7%
Product, clothing and related designers	3.9%
Artists	3.7%
Web design and development professionals	3.6%
Industrial designers	2.7%
Commercial artists	2.4%
Draughtspersons	2.3%

Creativity beyond the Creative Industries

The Council for Higher Education in Art and Design¹⁸ highlights “the importance of understanding creative arts and design outside the ‘creative industries’ box as diverse sets of skills underpinning inclusive approaches to innovation and the development of innovators.”

The discourse around management, innovation and leadership shows the interest in creativity within the wider business community:

- / ‘Strategy Needs Creativity’ runs the headline for a 2019 article for the Harvard Business Review¹⁹
- / Thought leadership published by McKinsey: ‘Creativity’s bottom line: How winning companies turn creativity into business value and growth’²⁰
- / Research published by Creative Industries Policy Evidence Centre showed that, out of 39 transferable skills cited in job adverts, ‘creativity’ is the most significant predictor for an occupation’s chance of growing as a percentage of the workforce²¹

Creativity in this sense is considered a mindset or approach. It can be presented as a set of cross-sector techniques for general enhancement of workplace performance. For example:

- / “Visualisation: presenting concepts, information and proposals using images, diagrams and visual metaphors”
- / “Cross-train your team: at many organizations, the answer for thinking differently is in another division, across the hall”
- / “Don’t limit yourself ...Eliminating boundaries and looking at what could be possible is often a good way to innovate and create the perfect conditions for fresh new ideas”



6. The Value of Creativity and Creative Education

A recent paper in *The Design Journal*²² demonstrates that design research has a wider impact: "Design research contributes to other disciplines in and beyond the creative industries and supports industrial competitiveness, innovation, knowledge, skills, and social policy"

Its analysis of Design Research awards made by UKRI over recent years shows that:

- / 37% of projects studied contribute to 'social change' - empowering people (especially disadvantaged groups) to gain agency, enhancing the quality of their lives, and improving social wellbeing through better social interactions
- / 27% generate 'cultural value' – contributing to individuals and societies through artistic and cultural practices such as sound art, performance, storytelling, and others
- / 21% generate 'economic value', in terms of employment opportunities in the creative economy, and embedding technological innovations within enterprises and manufacturing businesses

Research from the Cultural Learning Alliance²³ demonstrates the broader benefits of arts participation and education:

- / Participation in structured arts activities can increase cognitive abilities by 17%
- / Learning through arts and culture can improve attainment in Maths and English.
- / Learning through arts and culture develops skills and behaviour that lead children to do better in school.
- / Students from low-income families who take part in arts activities at school are three times more likely to get a degree
- / Employability of students who study arts subjects is higher and they are more likely to stay in employment
- / Students from low-income families who engage in the arts at school are twice as likely to volunteer
- / Students from low-income families who engage in the arts at school are 20% more likely to vote as young adults
- / Young offenders who take part in arts activities are 18% less likely to re-offend
- / Children who take part in arts activities in the home during their early years are ahead in reading and Maths at age nine
- / People who take part in the arts are 38% more likely to report good health

7. National Innovation Policy

In March 2021 it was confirmed that the Industrial Strategy was being discontinued by the UK Government, along with the council of business leaders which had overseen it.

The Industrial Strategy is superseded by the government's new Plan for Growth²⁴, which has a target for the UK to raise R&D investment to 2.4% of GDP by 2027, an increase from current level of 1.7%. The Plan for Growth also announced investment of £800m into a new Advanced Research and Invention Agency for the funding of "high-risk, high-reward research."

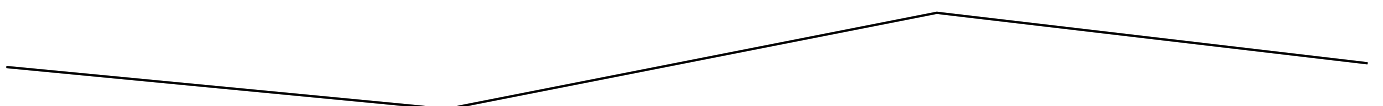
Design in Innovation

In 2020 Innovate UK published its Design in Innovation Strategy²⁵. Central to the strategy is the principle that: "Effective innovation requires more than technical research and development: it must also include design activities to create solutions that are better, more desirable and fit-for-purpose."

There is compelling evidence that design, a core creative discipline and sector in its own right, can act as a translational language between multiple disciplines, to negotiate between social, political, behavioural, and technological drivers:

- / The design-value index²⁶ shows has shown that since 2013 design-focused companies have outperformed the S&P Index by more than 200%
- / Data from McKinsey²⁷ shows organizations that regularly follow design thinking practices see a third higher revenues than those that don't
- / 71 percent of companies say design thinking has improved the working culture at their organizations; and 69 percent say it makes their innovation processes more efficient²⁸

AHRC is developing a major new Design Research programme, building on five studies commissioned in 2020 looking at the role of design research in tackling key cross-disciplinary challenges, such as mobility, place and AI. These studies provided a platform to demonstrate the value of design research across major economic and societal challenges, and AHRC is now building the business case for major investment from April 2022.

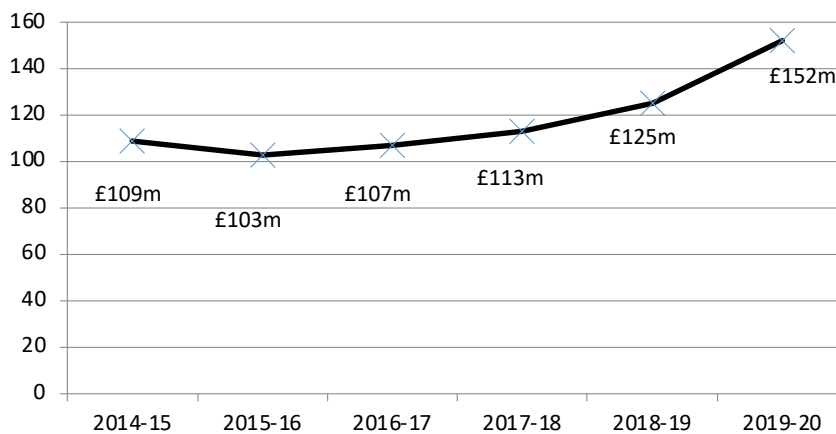


8. R&D Funding

UKRI is the national umbrella body for public R&D funding. In its 2018/19 operating year, UKRI placed funding of nearly £8 billion. Its Corporate Plan²⁹ for 2020/21 budgets for £9.074 billion. The AHRC and Innovate UK are the two principal funders of creative-led academic and business research.

There has been a significant increase in funding for design through the AHRC Creative Industries Clusters programme. There has also been a number of investments through two recent funding calls: the Covid-19 Fast Start competition, and the Sustainable Innovation Fund.

AHRC Total Expenditure



Graph: AHRC Annual Expenditure³⁰

Innovate UK Funding

Since 2015, Innovate UK has spent £6 million on match funded grants delivered through its Design Foundations competitions³¹, which have enabled over 150 early-stage, human-centred design studies.

As the table below shows, art colleges often struggle to secure R&D grant funding from Innovate UK. While numerous awards are given to creative-led innovation projects within larger universities, the share taken by specialist creative institutions tends to be much smaller.

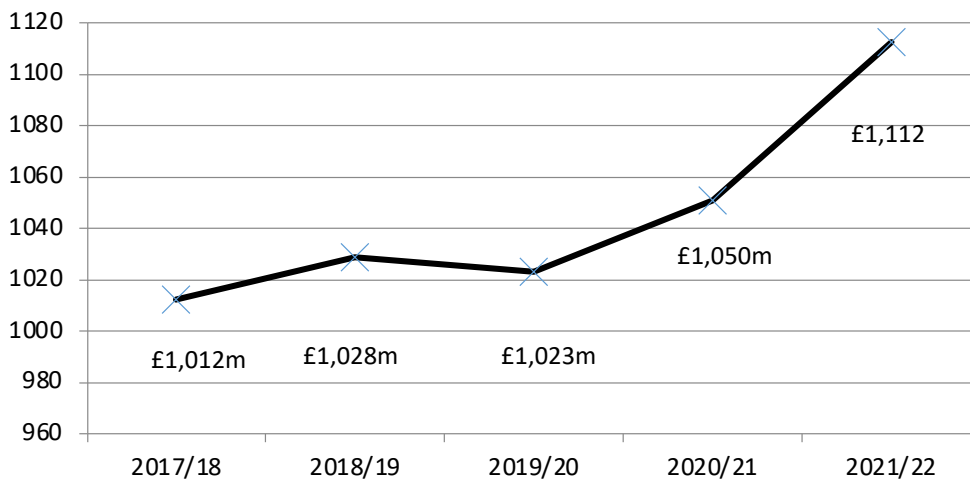
	Number of Awards	Total Grant Award
Glasgow School of Art	7	£572,034
Royal College of Art	4	£644,917
Goldsmith's College	4	£342,395
UAL	7	£490,891

Table: Innovate UK Grant Awards since 2010³²

Scottish Funding Council

The SFC is the national agency investing in teaching, students, apprenticeships, R&D and innovation in Scottish universities and colleges³³.

Scottish Funding Council: university revenue budget (NB 2021/22 shows indicative budget)



European R&D Funding

Horizon Europe is the EU's main research and innovation programme, with a budget of €95.5 billion until 2027³⁴. In January 2021, the government announced that the UK will associate to Horizon Europe. This means UK academic researchers and businesses will be able (with few exceptions) to access funding under the programme on equivalent terms as organisations in EU countries, including as consortia project leads.



9. Equality, Diversity and Inclusion

In November 2020, Universities UK published a “new set of recommendations designed to decisively tackle racial harassment as part of efforts to address racial inequality in UK higher education.” Writing in the foreword to the report³⁵, Professor David Richardson, Chair, UUK Advisory Group on tackling racial harassment in higher education writes: “We must acknowledge the institutional racism and systemic issues that pervade the entire higher education sector, in all institutions, if we are to bring about meaningful change.”

Widening Access in Scottish HE

The Scottish Funding Council’s Report on Widening Access³⁶ presents data on the sector’s inclusivity. The data also shows SFC’s progress towards its target “that by 2030, students from the 20% most deprived areas should represent 20% of entrants to higher education.” Some headline figures from the report:

- / 15.9% of Scottish full-time first degree entrants to Scottish universities were from 20% of the most deprived areas of Scotland (up from 15.6% in previous year)
- / 86.8% of Scottish full-time first degree entrants to Scottish universities from the 20% most deprived areas completed year 1 and remained in HE in 2018/19. (This compared with 91.9% across all full-time first degree entrants)
- / There were 320 care-experienced entrants to full-time first degrees (up from 255 in previous year)

GSA and Equality and Inclusion

Glasgow School of Art has a tradition for inclusivity and taking students from all backgrounds, and this is borne out by figures from HESA³⁷ for the academic year 2018-19.

Table: Proportion of students from state schools at GSA and other art schools

Institution	Percentage from state schools/ colleges
GSA	93.7%
UAL	92%
Goldsmiths	93.1%
Arts University Bournemouth	95.8%

This is particularly impressive, given the poor record of renowned art institutions. Three of the ten HE Institutes in the UK most likely to favour privately educated young people over those educated in state schools are specialist art institutions, with Royal College of Music bottom of the list, and the Courtauld Institute third from bottom.

10. The Climate Emergency

In 2019 the Scottish Government declared a climate emergency and passed legislation committing to Scotland becoming a net-zero society by 2045. Creativity and design is becoming increasingly important in this – not just in terms of reducing the sector's own carbon footprint, but having a wider impact on innovation and supporting behavioural change.

- / The global apparel and footwear industry produced 2.1 billion tonnes of CO₂, emissions in 1918, more than France, Germany and the UK combined and 4 per cent of total global emissions³⁸
- / Films with budgets of over \$70m produce an average of 2,840 tonnes of CO₂, equivalent to the amount absorbed by 3,700 acres of forest in one year³⁹
- / Each year UK music festivals produce 23,500 tonnes of waste with audiences consuming 10 million plastic bottles⁴⁰

“Design has a vital role to play in shaping innovative solutions to the big challenges facing our society and the world we live in. From helping us to stay healthy and happy for longer, to preserving and protecting our planet and resources.” – Innovate UK, “Design in Innovation Strategy”

In 2019, more than 7000 higher and further education institutes from six continents of the world declared a climate emergency⁴¹. In the UK, there are declare emergency industry movements in the architecture, design, music and culture sectors.

There are more than 60 sustainable design courses (including e.g. Sustainable Construction, Environmental Engineering) at art colleges, universities and other HE Institutes across the UK⁴².

Scotland's Creative Industries and the Climate Emergency

In 2017, Creative Carbon Scotland undertook research⁴³ into the creative sector's awareness of environmental impact. Some conclusions from the study:

- / “... both digital content and craft businesses ... are at an early stage in managing their carbon impact.”
- / “Awareness of the business's impact (measuring and monitoring energy, water, waste and travel emissions) is the first stage of the journey and there is an observed need for support in this area.”
- / “Particularly for the digital content sub sectors, it is recommended that training should be available to help businesses understand the carbon impacts of their activities, how to reduce emissions and how to assess the social and economic benefits which accompany emissions reductions.”



11. Digital Learning

Professor Neil Smith, Principal Investigator of The Unbundled University research project⁴⁴: "Even before Covid-19, decision makers in universities were grappling with complex discussions in relation to campus-based and online education, and trying to identify mechanisms to generate a return on investment from campus-based digital technologies, alongside experimenting with approaches to grow their online education portfolio."

A 2020 report⁴⁵ for the Office for Students led by Sir Michael Barber reviewed the Covid-related "rush of activity in universities and colleges to transition from in-person teaching to online delivery." Some findings from the review:

- / "47 per cent of teachers had no experience of digital teaching and learning at the beginning of lockdown in March 2020 "
- / "We often heard that the pandemic had highlighted inadequacies in digital infrastructure and that greater investment was needed"
- / "Technology cannot just be bolted onto an existing set of teaching materials. This principle was highlighted in our interviews and in studies exploring opportunities for digital technology for learning, which stress the importance of pedagogy driving all digital teaching and learning"
- / "To fully capitalise on the pedagogical opportunities and new forms of interaction presented by digital tools, providers will need to create new jobs like learning technologists, online coaches and facilitators, and real-time content curators."

The Creative Education Sector

Digital technology features within the arts colleges – for instance, as object of study itself, or to deliver online teaching amidst campus shutdown. But there is little clear sign from a review of information in the public domain that institutions are deploying learning technology in a way that offers pedagogical benefit specific to the art and design learning context.

Two good examples of how universities are combining arts and digital technology are: SODA in Manchester Metropolitan University and the Centre for Creative Computing at UAL

An example of learning technology usage that is specific to the performing arts is the experimental TELMI project⁴⁶ (Technology Enhanced Learning of Musical Instrument Performance) at Royal College of Music e.g. "several ground breaking technologies are being applied within the project to detect the movement and sounds a musician makes. These include advance sensors that measure the exact speed and position of the bow ... These systems can provide real-time feedback to the violist and their teacher."

12. The Student Experience

Just as the concept of customer experience has gained currency within industry and patient experience has gained currency within healthcare, so the concept of student experience has emerged within the HE sector.

Many UK institutions publish a student experience strategy (e.g. Keele University: "We are passionate about, and committed to, delivering an outstanding student experience ..."; Goldsmiths: "The student experience is at the centre of everything we do here ...").

Various surveys translate student experience into a numerical value, which in turn can be used to rank the student experience across different institutions.

In June 2021, Universities UK is holding a conference⁴⁷ called 'Enhancing the Student Experience'. Session titles from the conference give an idea of the themes and preoccupations associated with this area:

- / 'From selling, to maintaining, to enhancing the student experience'
- / 'Supporting Ethnic Minority students with mental health and wellbeing'
- / 'Two-way conversations with students'
- / 'Women on campus'

The UK Government's International Education Strategy⁴⁸ states: "Central to the UK's globally competitive offer to international students is our commitment to delivering a world-class student experience." The Strategy identifies ways in which the government will work with the sector in order to enhance "the international student experience from application to employment."

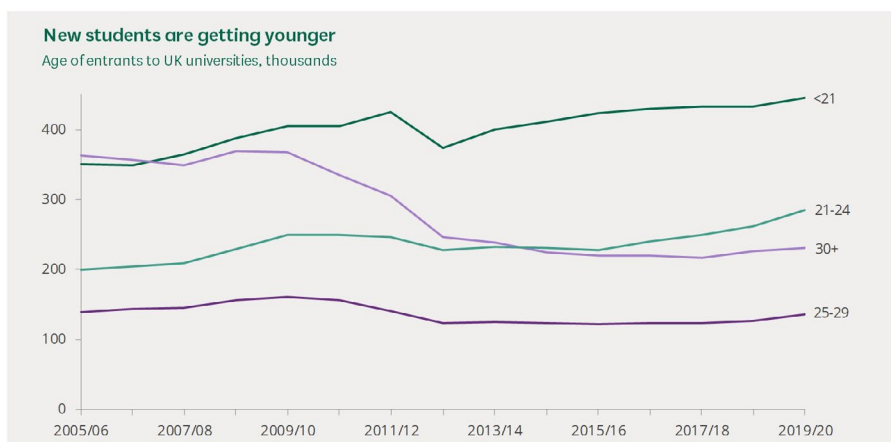


Student Demographics

According to figures from HESA⁴⁹ and the most recently published equality monitoring report⁵⁰ from the GSA, here are some key demographic features of UK universities and GSA.

- / 57% of UK HE students were female in 2017/18, up from 56% in 2013/14
- / 25% of UK HE students were of non-white ethnicity in 2017/2018, up from 22% in 2013/14
- / 13% of UK HE students had a disability in 2017/18, up from 10% in 2013/14
- / 63% of students at GSA were female in 2015/16
- / 20% of students at GSA were BAME in 2015/16
- / 18% of students at GSA had a disclosed disability in 2015/16

Across the UK, the number of mature students (over 21) has fallen over the last 15 years.⁵¹



APPENDIX: INTERNATIONAL EXEMPLARS

1) University of Cambridge: new online courses for professionals

In May 2021, the University of Cambridge launched a new online learning concept aimed at professionals. The courses are led by University of Cambridge academics and cost about £2,000. Upon completion, learners "receive a certificate of achievement signed by the University of Cambridge."

<https://advanceonline.cam.ac.uk/>

<https://www.cam.ac.uk/news/cambridge-advance-online-courses-open-up-university-of-cambridge-as-part-of-major-digital-learning>

2) University of Salford: immersive VR training for nurses

"The university has completed a three-year project that trained nurses dealing with critical life support situations in an immersive 3D environment where experiences meet sight, sound and touch."

<https://www.salford.ac.uk/news/nursing-students-immersed-virtual-reality-part-real-life-training>

3) Royal Agricultural University: new Joint Institute with Qingdao Agricultural University

In 2020, the Royal Agricultural University (RAU) opened a Joint Institute in China with the Qingdao Agricultural University. From a press release: "The RAU is ... the only small specialist university in the UK to have established a Joint Institute with endorsement from the Chinese government ... The degrees will be delivered at the QAU campus, with students being taught in English by both RAU and QAU academics."

<https://www.rau.ac.uk/about/news-and-events/news/royal-agricultural-university-extends-global-reach-launch-joint-institute>

4) Royal Academy of Music: Technology Enhanced Learning of Musical Instrument Performance (TELMi)

"...several groundbreaking technologies are being applied within the project to detect the movement and sounds a musician makes. These include advance sensors that measure the exact speed and position of the bow ... These systems can provide real-time feedback to the violist and their teacher"

<https://www.rcm.ac.uk/research/projects/telmi/>

5) University of Birmingham: UoB local secondary school

"Drawing upon our partnership with the University of Birmingham and their world-leading research and best-practice resources ... we're setting an example of what's truly possible for secondary school education."

<https://uobschool.org.uk/>

6) Australian National University: below zero carbon emissions

"The goal is for ANU to achieve below zero emissions by 2030 for energy, waste, work travel and direct on-campus greenhouse gas emissions. Our approach integrates practical emission-reductions with research and teaching activities at ANU. We aim to use our expertise to drive innovation in this vital sector."

<https://www.anu.edu.au/research/research-initiatives/anu-below-zero>

7) University of Cardiff: National Software Academy

"The National Software Academy (NSA) is an ... initiative by Cardiff University, working in partnership with the Welsh Government and industry leaders ... the NSA delivers innovative undergraduate and postgraduate degree programmes. Both courses focus on providing the skills, knowledge and hands-on experience required to be immediately effective as a commercial software engineer."

<https://www.cardiff.ac.uk/software-academy>



8) University of Plymouth: the Sustainability Hub

"Supported by an investment from the European Regional Development Fund (ERDF), the three-year £2.6 million programme, will support Devon-based organisations to access research, business support, and engage with the University of Plymouth around the low-carbon agenda."

<https://www.plymouth.ac.uk/research/sustainability-hub-low-carbon-devon>

<https://www.plymouth.ac.uk/students-and-family/sustainability/the-sustainability-hub-facilities>

9) UCL: improving student experience with Unitu

"Unitu is an online platform that helps universities and student unions to collect and analyse student feedback, to enable faster improvements to the student experience. It's a space where students, year representatives and staff can collectively raise, discuss and resolve both academic and more general experience issues."

<https://www.ucl.ac.uk/teaching-learning/case-studies/2020/aug/how-arts-sciences-basc-listened-students-ideas-and-concerns-real-time>

10) NEOMA: "first virtual campus in Europe"

"NEOMA Business School is now the first school in Europe to open a 100% digital campus ... The purpose of the digital campus is to create the interactions and atmosphere of a real campus ..."

<https://neoma-bs.com/>

<https://thepienews.com/news/europe-first-100-virtual-campus-opens/>

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SCHOOL OF ART**

The Glasgow School of Art
167 Renfrew Street
Glasgow, Scotland
G3 6RQ
www.gsa.ac.uk

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