



National College for
Teaching & Leadership

Initial teacher training bursary guide

Academic year 2015/16

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Important changes

With effect from academic year 2015/16 the discretionary bursary uplift has been withdrawn. Trainees will only be eligible for the bursary their academic achievement merits.

There will no longer be a bursary uplift payable in relation to the level of free school meals in a school where school direct trainees are training. All school direct trainees will receive the standard applicable bursary amount regardless of location of trainee.

Section 1 – Introduction and overview

Introduction

1. This guide provides information on eligibility for and rates of training bursaries for initial teacher training (ITT). The guide is for providers and schools participating in both School Direct (tuition fee) programme and provider-led ITT programme and applies to trainees starting ITT in the academic year 2015/16. Trainees and prospective trainees should use the [Get into Teaching website](#).
2. We may need to make changes to this guidance. If so, we will issue a new version and let schools and ITT providers know.
3. Any changes made will be logged in the change log at the back of the guide.

Overview

4. The training bursary is a financial incentive to attract and retain high quality graduates into the teaching profession. Bursary levels vary according to the trainee's degree classification and the subject in which they wish to train to teach. For some subjects, a trainee's A level grade may affect both eligibility for and the rate of a bursary. Trainees must have at least a 2:2 degree to access a bursary in most shortage subjects, and at least a 2:1 for non-shortage subjects.
5. Those with first class degrees are eligible for the top tier of bursary payments. Those with 2:1 degrees are eligible for the second tier and those with 2:2 degrees are eligible for the third tier. There is also a fourth tier which is restricted to physics, maths and Primary maths specialist and specialism candidates. The eligible bursary awards and levels are outlined in Section 2, with Figure 1 providing an overview of the financial incentives and eligibility criteria for trainees.
6. The scheme allows for the award of training bursaries only. Discretionary uplift to bursary awards have been discontinued in AY15/16
7. Training bursaries are mostly awarded to trainees who have the minimum 2:2 requirement but are also awarded to trainees who hold other relevant academic qualifications such as Master's, PhDs, overseas and medical degrees.
8. There is a Scholarships Programme available in physics, chemistry, maths and computing. Trainees with a 2:1 or above are eligible to apply. In exceptional circumstances trainees with a 2:2 may be eligible for a scholarship, if they have significant relevant experience outside of their degree. For more information visit the scholarship information page on the Get into teaching website.
9. The National College for Teaching and Leadership (NCTL) also pays bursaries for some Subject Knowledge Enhancement (SKE) courses. SKE courses are pre-initial teacher training courses designed to help potential trainees gain the depth of knowledge needed to

train to teach their chosen subject. Further information regarding SKE can be found on the following web page: <https://www.gov.uk/government/collections/initial-teacher-training>

10. Guidance on how to assess different types of qualifications for a bursary such as medical degrees, Ordinary degrees and degrees awarded overseas is available in Sections 3 and 4.

Section 2 – Training bursary award and eligibility

Eligibility

11. Bursaries are available in a range of subjects with the amounts available varying according to their relative priority. Priority subjects and levels of award are reviewed each year. No assurance can be given on the range of subjects or levels of award until these are published by the Department for Education.
12. The bursary level awarded is dependent on the subject in which a trainee wishes to teach and the grade of their highest academic qualification – not the subject of their academic qualification. For instance, a trainee with a first class degree in geography will be eligible for a £20,000 bursary if they are training to teach physics, and £9,000 if training to teach geography. This does not change the process of selection or recruitment that the provider would go through, including making judgements about the relevance of the degree to the subject of training.
13. The bursary award is fixed for the duration of the trainee's ITT programme and is not affected by the length or mode of training pursued.
14. The bursaries are intended to provide a financial incentive for high quality graduates to enter and also complete ITT. The payment mechanisms for bursaries can be found in Section 12.
15. Figure 1 sets out the bursary rates for 2015/16.

Eligible ITT subjects

High priority subjects

16. A scholarship award of £25,000 for trainees with a 2:1 or above is available in physics, chemistry, mathematics and computing. In exceptional circumstances trainees with a 2:2 may be eligible for a scholarship, if they have significant relevant experience outside of their degree.
17. Physics, biology, chemistry, languages, mathematics, computing, design and technology, geography, music and primary mathematics specialists and specialisms will attract a bursary if the trainee has a 2:2 degree or above. The bursary levels will vary depending on the trainee's degree classification and subject, as shown in Figure 1 below.
18. Trainee teachers in maths, physics and primary mathematics specialist (and specialism) may be eligible for a bursary of £9,000 without the minimum 2:2 classification. To qualify for this bursary, the trainee must have a degree in a relevant subject, with at least a B at A level in maths, further maths or physics. Trainees will not be entitled to this bursary if they are also entitled to a higher bursary based on their degree class.

19. If 'classics' is used to refer to a course that is mainly about ancient languages rather than classical civilisation, it will be eligible for the languages bursary. If 'classics' is used to refer to a course that is mainly ancient history, it will fall into the 'other priority subjects category' (see below).

Other priority subjects

20. English, history and primary general will only attract a bursary if the trainee has a 2:1 degree classification or higher. There are no bursaries for trainees with 2:2 degrees in these subjects.

Primary maths specialist (and specialism)

21. Bursaries in primary maths specialist (and specialism) are available to trainees with a B or above at maths A level on primary maths specialist or specialism courses only. Those who do not have a B or higher at maths A level, or those who train on general primary courses, will receive the normal primary bursary for their degree class.

Undergraduate bursary

22. A new bursary for final year undergraduates of £9,000 is available for trainees on courses in maths and physics that lead to QTS. The bursary is available to undergraduate trainees who enrol on a QTS course beginning in academic year 2015/16, and payable in the final year of their course

Troops to Teachers

23. Eligible graduate service leavers will receive a £2,000 bursary uplift if they are already entitled to a bursary payment. Service leavers should provide an MOD Certificate of Service (CoS). This will be paid to providers in their monthly training bursary allocation.

Non-eligible ITT subjects

24. All other ITT courses will not attract a bursary, regardless of a trainee's degree class. A full breakdown of eligible subjects can be found in Annex A. Details of which academic qualifications are linked to the relevant bursary levels are given in Section 4.

Figure 1: Financial incentives for those who train in 2015/16

Eligibility ¹ 2015/16	ITT Subject/phase								
	Physics	Maths	Chemistry, computing	Languages ⁴	Biology	Primary maths ⁵	Geography, D&T	Music	English, history, RE, primary
Scholarship ²	£25,000	£25,000	£25,000	-	-	-	-	-	-
Trainee with 1st/PhD	£25,000	£25,000	£25,000	£25,000	£15,000	£12,000	£12,000	£9,000	£9,000
2:1/Master's	£25,000	£20,000	£20,000	£20,000	£12,000	£12,000	£9,000	£4,000	£4,000
2:2	£15,000	£15,000	£15,000	£15,000	£10,000	£12,000	£4,000	£4,000	£0
Other ³	£9,000	£9,000	£0	£0	£0	£9,000	£0	£0	£0

Notes for Figure 1

¹ Applicants with a degree from outside the UK should refer to the [equivalency table \(PDF, 1MB\)](#) to see if their degree is likely to attract a bursary, or should consult their chosen training provider.

² Trainees in maths, physics, chemistry and computing with a 2:2 or above are able to apply for a teacher training scholarship with the appropriate professional body.

³ Trainee teachers in maths and physics, and on primary maths courses, with a relevant degree and at least a B at A level in maths or physics (or equivalent) will be eligible for a bursary of £9,000. Trainees will not be entitled to this bursary if they are also entitled to a higher bursary based on degree class.

⁴ Bursaries are available to train to teach modern foreign languages, community languages and ancient languages including Latin and Ancient Greek.

⁵ Bursaries are available to trainees on either primary maths specialist courses or primary general (with mathematics) courses. Trainees on other primary courses will be eligible for the standard primary bursary.

A full list of allocated subjects and NCTL funding can be found in Annex A

Section 3 – Assessing UK academic qualifications

Honours and Ordinary Bachelor's degrees

25. The Framework for Higher Education Qualifications in England, Wales and Northern Ireland (FHEQ), maintained by the Quality and Assurance Agency for Higher Education (QAA), sets out that someone who holds a Bachelor's degree with honours will have

“developed an understanding of a complex body of knowledge, some of it at the current boundaries of an academic discipline”. In addition, holders of this award: “will be able to evaluate evidence, arguments and assumptions, to reach sound judgements and to communicate them effectively.”

26. Honours degree holders will usually have completed an independent dissertation or thesis relating to the subject in which they are specialising and will have undertaken considerably less contact hours than an Ordinary degree. The length of study for a full-time Bachelor's degree with honours usually equates to three years – longer for the part-time equivalent. Honours degrees require 360 credits for completion.

27. Ordinary Bachelor's degrees are largely a taught degree programme with less specialisation or independent study involved and the outcome can sometimes be a license to train in a particular subject, such as accounting. A trainee may sometimes be transferred from an honours programme onto an Ordinary degree programme if they have not achieved the required grades throughout the programme to graduate with honours. Open Degrees from the Open University awarded without honours, would fall into this category and would not be eligible for bursaries in their own right. Trainees may be able to study a further 60 credit module to convert these degrees to honours, but this may not necessarily uplift the trainee's final classification to at least 2:2, which is necessary for bursary eligibility. Trainees in this position are advised to contact the Open University for advice.

Medical first degrees

28. First degrees in medicine which are qualifying awards in professional terms are not classified. Although usually entitled 'Bachelor', they are at level 7 (Master's level) on the FHEQ. However, this will apply only to degrees that are 5 years in length. Trainees holding these 5-year degrees in medicine, dentistry, veterinary science and surgery can be awarded the Tier 2 or 2:1 level of bursary for the subject in which they wish to train to teach. These degrees can be funded from a provider's bursary allocation. Trainees who hold a first or distinction in an integrated Master's medical degree will be entitled to the Tier 1 bursary.

29. However, there are also medical Bachelor's degrees which may be awarded as exit awards to students who satisfy the criteria specified but fail to meet the criteria for progression to the fourth or fifth year of the qualifying medical degree. These are often called Bachelor's of Medical Science (B Med Sci). Trainees holding these degrees can be awarded the Tier 3 or 2:2 level of bursary for the subject in which they will train to teach.

30. As a number of award titles may be used in both categories of award, ITT providers are advised to check individual cases with the relevant awarding bodies before making a decision about awarding bursaries.

List of eligible academic qualifications

31. Part of the conditions for receiving the bursary is that the trainee holds a UK degree or equivalent, with at least second class honours (except maths, physics and primary maths specialists/specialism). However, for the purposes of determining the bursary award, ITT providers should take the trainee's highest academic qualification that aligns with a bursary tier. Figure 2 sets out the eligible academic qualifications and equivalent bursary award.

Figure 2: Higher qualifications and bursary tier eligibility

Highest qualification	Tier 1	Tier 2	Tier 3	Good A level and relevant degree (maths, physics and primary maths specialists (specialisms only))
PhD ⁷	X			
First class honours degree ^{*8}	X			
Medical Master's (distinction)	X			
Master's ⁹		X		
2:1 honours degree [*]		X		

2:2 honours degree*			X	
Third class honours degree				X
Aegrotat				X
Ordinary degree				X
No first degree				X

Notes for Figure 2

⁷Honorary doctoral degrees are not recognised by QAA as academic qualifications.

⁸May include Integrated Master's, please refer to section 4.12.

⁹These do not include the MA granted on application by the University of Oxford or Cambridge. Please see Section 4 for more details.

* or equivalent, supported by the data in the [Overseas Equivalence Data](#) document.

32. Aegrotats are degrees awarded if a trainee was unable to sit their final exams due to illness and are not eligible for the bursary in their own right. Non-honours and Ordinary degrees are also ineligible for the bursary in their own right. Trainees who do not hold a first degree or equivalent at second class honours or above will not be eligible for a bursary in principle unless they have an eligible relevant higher academic qualification, as set out in Figure 2. Trainees who do not hold a first degree or equivalent of at least second class honours, but hold a postgraduate certificate (PGCert) or diploma (PGDip) as their highest qualification will not be eligible for a bursary.

PhD and Master's qualifications

33. PhD and Master's-level qualifications may include other UK qualifications deemed by the provider to have the same level of academic breadth and depth. These qualifications should be funded from a provider's bursary allocation.

34. If a provider is using a higher academic award, i.e. PhD or Master's, to uplift the bursary entitlement they must seek confirmation that the qualification was completed prior to the commencement of training course. If the outcome is not yet known, the bursary award must be made based on the highest relevant academic award on the date training course started. If the trainee successfully gains the higher award a retrospective uplift can be applied. In these circumstances please contact the Funding Team for further information at: FA.Team@education.gsi.gov.uk

Master's degree

35. The FHEQ describes Master's degrees as separate from other postgraduate qualifications in their "increased intensity, complexity and density of study." Master's degrees are awarded after the completion of taught courses, programme of research or a mixture of both and the FHEQ's descriptor for Master's degrees states that they "typically include planned intellectual progression that often includes a synoptic/research or scholarly activity." The level of study associated with a Master's degree should typically equate to one calendar year full-time.

36. These do not include the Master of Arts (MA) which are granted, on application, by Oxford, and the University of Cambridge, to graduates of these universities with a Bachelor of Arts (BA). Master's degrees which are offered as part of a trainee's route to QTS, will not count for the purposes of assessing eligibility.

Integrated Master's degrees

37. Integrated Master's degrees are undergraduate programmes extended by one year to enable students to reach Master's level. Providing they have reached a suitable standard of achievement after 3 years of Bachelor's level-study, students can study for a fourth year for a Master's degree where the academic level of work in the fourth year is at Master's rather than at Bachelor level.

38. These programmes are normally found in science and engineering academic disciplines, and the usual degree awarded is MEng or a named integrated Master's degree such as MPhys (Master of Physics) or MChem (Master of Chemistry). Completed integrated Master's degrees are equivalent to Level 7 (Master's degree) on the FHEQ and trainees who have achieved a distinction are eligible to receive the top tier bursary.

39. Trainees who took an integrated Master's but didn't have a degree classification or pass/merit distinction, can be considered for the higher bursary, but the provider will have to be required to demonstrate that the trainee is of high quality. Trainees that did not complete the final year can be awarded a bursary based on their final degree classification on exit and the subject in which they train to teach.

Doctoral degrees

40. The FHEQ's descriptor of doctoral degrees sets out that they are awarded for the "creation and interpretation, construction and/or exposition of knowledge which extends the forefront of a discipline, usually through original research". Professional doctoral programmes that may include a research component, but which have a substantial taught element lead usually to awards which include the name of the discipline in their title (Ed.D, DClinPsy or DBA are common examples). The titles PhD and DPhil are commonly used for doctoral degrees awarded on the basis of original research. The level of study associated with a doctoral degree should typically equate to 3 calendar years full-time for a research-based doctoral degree although it may take up to 5 years of full-time

study for a professional doctoral degree. Honorary doctorates are not eligible academic qualifications and are not accepted by QAA as academic qualifications.

Section 4 – Assessing overseas qualifications

NARIC equivalence data

41. When selecting trainees with overseas degrees, ITT providers should ensure that they follow the appropriate procedures when assessing overseas qualifications and ensure that they are compliant with the ITT requirements. This will involve obtaining, or asking the candidate to obtain, evidence from the National Recognition Information Centre for the United Kingdom (UK NARIC) which confirms whether or not the trainee's degree is comparable to UK British Bachelor, Master's or Doctorate level. The Statement of Comparability provided by NARIC as evidence cannot be used to establish the classification of the trainee's degree; this has to be done either by using the equivalence data in Overseas Equivalence Data document, or by making a professional assessment.

42. NARIC produced a set of independent data (see the Overseas Equivalence Data document) for NCTL, to help ITT providers make assessments on whether overseas degrees were comparable to second class honours and above. The study looked at all overseas degrees comparable to British Bachelor degree standard, and where the degree was comparable to an honours degree, equivalence to 2:2, 2:1 or first class honours was made, to help ITT providers determine the appropriate level of bursary award. The methodology used to produce the data is published on the DfE grade comparisons of overseas qualifications web page. UK NARIC does not recommend applying the methodology or the resulting dataset in other contexts.

43. Please contact the funding team at FA.Team@education.gsi.gov.uk if you require further assistance or if the country from where your trainee's degree originates is not included in the data. This data is intended as an advisory guide for ITT providers, and ITT providers must use their professional judgement in determining eligibility.

44. For trainees in maths and physics who hold overseas degrees that are not deemed equivalent to second class honours or above (but are degree equivalent), ITT providers are able to award a core bursary at Tier 4 providing that they are satisfied that the A level equivalent requirement is fully met.

45. It is important to note that many overseas qualifications sit either above or below 'British Bachelor degree standard', and therefore will not be included in the data in the Overseas Equivalence Data document as they were outside of the original scope of the commissioned report. It is therefore important to seek a NARIC-sourced Statement of Comparability from the trainee to verify the actual degree itself before making any judgements about bursary eligibility. The data in the Overseas Equivalence Data document should not be used to inform judgements about the trainee's qualification in general, and should be used to make an informed decision on the level of bursary associated with degrees which have been found comparable to honours level.

Assessing overseas Bachelor's degrees

46. Overseas undergraduate degrees that can be compared to a Bachelor's degree by NARIC, will usually have 3 outcomes:

- Comparable to British Bachelor (Ordinary) degree standard;
- Comparable to British Bachelor degree standard; or
- Comparable to British Bachelor (Honours) degree standard.

British Bachelor (Ordinary) degree standard

47. Where the trainee's first degree is comparable to 'British Bachelor (Ordinary) degree standard', this means that the degree is based around a taught education, often multi-disciplinary, or with a broader range of subjects studied and more contact hours involved.

48. Comparison to 'British Bachelor (Ordinary) degree standard' indicates that there is clear differentiation between the types of study programmes in that country. This means that the degree has been found to be below honours level and therefore the trainee would not be eligible for a bursary in principle, as would be the case had the trainee undertaken an Ordinary or non-honours degree in the UK.

British Bachelor (Honours) degrees without grading

49. Where the trainee's first degree can be compared to 'British Bachelor Honours degree standard' but there is no actual grading of the degree available as suggested by the equivalence data, ITT providers may award a bursary at the initial 2:2 level for the appropriate ITT subject, providing they are satisfied that the trainee's degree is of the same depth and breadth as a degree with at least second class honours. ITT providers are also advised to seek a transcript of the trainee's degree if available.

50. If the provider wishes to award a higher level of bursary but there is no grading available, they are advised to seek further evidence of the trainee's achievement. Please contact the Funding team at FA.Team@education.gsi.gov.uk if the data in the Overseas Equivalence Data document suggests that a grading should be available for the trainee's degree, but the trainee was not issued with a final grade.

Use of equivalence data to assign a bursary level

51. Provider judgements on overseas degree equivalence to UK degree classifications can be supported by the data in the Overseas Equivalence Data document, if the trainee's degree is equivalent to 'British Bachelor Honours degree standard', and has a grading available. Overseas degrees not equivalent to at least second class honours as supported by the data in the Overseas Equivalence Data document are deemed equivalent to Ordinary or third class degrees, unless they have been compared to 'British Bachelor

degree standard' and the provider is able to defend their assessment that the individual's degree is equivalent to at least second class honours.

Countries not included in the equivalence data

52. Where the data in the Overseas Equivalence Data document does not include the country from where the trainee holds their degree, or the data refers to a 'case-by-case' analysis, then ITT providers should contact the Funding team at:

FA.Team@education.gsi.gov.uk

53. ITT providers are reminded that they must hold full and transparent audit trails relating to bursary payments made to trainees with overseas degrees which are not comparable to honours level as confirmed by the data in the Overseas Equivalence Data document and are equivalent to 'British Bachelor degree standard'.

Agreed exceptions to the overseas equivalence data

France

54. The M1 qualification, which is awarded after exiting the new 2 year French Master's programme, can be treated in the same way as a Maitrise if the trainee has successfully completed 2 semesters and holds 240 credits. Alternatively, trainees exiting the new Master's programme may request a Maitrise on exit.

55. French trainees, who hold the Licence post 2009, and a score of 11, may be considered for bursary eligibility at 2:2 level. However, they must be able to demonstrate outstanding achievement and other merits in order to be considered.

Colombia

56. The Licenciado and other professional titles obtained in Colombia are not comparable to British Bachelor degree standard, due to the variance between institutions and programmes. However, professional Licenciado titles which have been awarded an accreditation of excellence can be compared to 'British Bachelor Honours' degree standard. Most institutions should be able to provide this confirmation, however it is also available on the Colombian National Council for Accreditation's website.

57. NCTL will continue to review individual overseas degrees which may need further examination. The outcome of any reviews undertaken by NARIC will be published as new revisions to the equivalence data in the Overseas Equivalence Data document.

Overseas Master's and Doctoral degrees

58. Trainees who hold overseas Master's and Doctoral degrees may be assessed for eligibility independently of the Overseas Equivalence Data document. ITT providers must carry out the necessary checks on the trainee's overseas qualification that they would usually make when assessing eligibility for entry to an ITT course, and obtain a Statement

of Comparability from NARIC or source confirmation from the trainee as advised in Section 5 of this guide.

59. Where a trainee's degree can be compared to UK Master's or Doctorate level, these degrees should be treated as equivalent, and the appropriate bursary award should be awarded for that ITT subject from the bursary allocation as outlined in Section 2.

60. Any bursary awards for overseas Master's or Doctoral degrees which are not equivalent to a UK Master's or Doctoral degree must be funded from a provider's core bursary fund. ITT providers must use their professional judgement to determine the level of bursary, but must be prepared to build a strong case for awarding a higher bursary award than their qualification would suggest. Trainees must hold an undergraduate degree of at least second class honours or above in addition to holding an overseas Master's or Doctorate degree to be eligible for an upgrade from the discretionary bursary fund.

61. In exceptional cases, trainees who hold overseas Bachelor's and Master's or Doctoral degrees that both sit below 'British Bachelor Honours' degree standard as confirmed by NARIC may be funded at the 2:2 level from a provider's bursary allocation if the provider is able to provide a strong business case backed up by a full audit trail for bursary eligibility.

62. Information on how to record this information on the DMS will be sent to ITT Providers and schools nearer the time of the October census.

Section 5 – Admissions

63. ITT providers will need to ensure those responsible for decisions on eligibility for the bursary are familiar with, or have access to, advice on the range of qualifications generally regarded as equivalent to a first (Bachelor's) degree in the UK, including overseas qualifications, professional or vocational qualifications, and qualifications no longer available but held by mature applicants.

64. ITT providers will need to be aware of the range of degrees awarded by UK institutions. It is for the provider to decide whether an individual's highest relevant academic qualification meets the bursary eligibility criteria, and whether a particular qualification demonstrates the breadth and type of academic engagement that would be expected from undertaking a Bachelor's, Master's or Doctoral degree.

65. ITT providers that are not themselves degree-awarding bodies, or are unfamiliar with assessing the validity of academic qualifications, may wish to familiarise themselves with the Framework for Higher Education in England, Wales and Northern Ireland, maintained by the [QAA](#)

Section 6 – Eligibility criteria for receiving the bursary

66. For a trainee to be eligible to receive a bursary, the provider must ensure that, from the first day of training, the trainee meets, and continues to meet the criteria set out and further explained below. To be eligible for a bursary, the trainee must:

- be an 'eligible' student for the provision of UK student support;
- be training in an eligible ITT subject listed in Annex A;
- hold a UK first degree with at least second class honours, or equivalent, or be training in maths, physics or Primary maths specialist (and specialism), hold a relevant degree and have at least a grade B A level in maths, further maths or physics;
- be taking a qualifying postgraduate ITT course;
- be notified by their ITT provider in writing that they are eligible;
- comply with the terms and conditions of the bursary scheme;
- not already hold QTS, or be eligible to receive QTS;
- not be undertaking paid teaching work when receiving the bursary;
- not be taking any other ITT course.

Criterion 1: The trainee must be an 'eligible' student for the provision of UK student support.

67. To receive a training bursary the trainee must meet one or more of the definitions for being an 'eligible' student to receive grants and loans towards tuition fees or living costs as set out in the current Education (Student Support) Regulations 2011, part two (eligibility), no. 1986.

Criterion 2: The trainee must be training to teach in an eligible ITT subject listed in Annex A.

Criterion 3: The trainee must hold a UK first degree or equivalent, with at least second class honours, unless training in maths, physics or primary maths (please see exceptions to criterion 3).

68. ITT providers should use the trainee's highest academic qualification that aligns with a bursary tier, to determine eligibility for a bursary. ITT providers should be confident that a trainee's academic qualification has the same level of breadth and depth that would be expected of a UK first degree or equivalent with at least second class honours.

69. Exception to Criterion 3: Trainees who are training in physics or maths and hold a relevant degree subject along with a B or above at A level in maths, further maths or physics are eligible (depending on whether they meet the other criteria) for a Tier 4 bursary.

Criterion 4: The trainee must not already hold QTS, be eligible to receive QTS or have previously failed a training programme leading to QTS.

70. Individuals who already hold QTS on the first day of their ITT are not eligible to take up an NCTL allocated place. Under current reciprocal arrangements, most qualified teachers from countries in the European Economic Area (EEA) or Switzerland are able to receive mutual recognition if they apply directly to NCTL.

71. Teachers who qualified in Australia, Canada, New Zealand and the USA can apply to NCTL directly for QTS, from 1 April 2013. ITT providers with such applicants should ask them to apply to NCTL first. Those who are successful in their application will not be eligible for an ITT place, or the bursary, but those that are unsuccessful in their application may be considered for eligibility.

72. Individuals who hold Qualified Teacher Learning Skills (QTLS) status from the Institute for Learning (IfL) can teach in schools as if they hold QTS, from 1 April 2013. However, they must continue to maintain their registration with the IfL. They will still be able to apply for an ITT place and in turn receive a bursary. However, they must hold a UK degree and A level requirements or equivalent to be eligible.

Criterion 5: The trainee must not be undertaking paid teaching work when receiving the bursary.

73. The bursary is designed to support the trainee whilst undertaking their ITT training and, in particular, their teaching practice. Trainees who undertake paid teaching in a school or institution become ineligible to receive the bursary from the date they start this work.

74. Trainees are deemed to be employed as a teacher if they are employed under a contract of employment or services with one or more local authorities, governing bodies or institutions to:

- be the headteacher or principal of one of more schools or institutions; or
- carry out one or more of a range of specified activities at one of more schools or institutions.

75. This definition of a teacher can include people employed by a local authority to teach as a supply teacher in schools maintained by that authority, but does not include people employed by private teacher supply agencies or private tutors.

76. The definition of a teacher includes 'unqualified' teachers who meet one or more of the descriptions set out in paragraphs 2 and 4—9 of schedule 2 in the Education (Specified Work and Registration) (England) Regulations 2003 (no 1663). Under this definition, teachers are permitted to carry out specified activity, including delivering lessons and assessing the development, progress and attainment of pupils. Please review these regulations for the full definition of specified activity.

77. The specified activities described above may count as teaching practice that leads towards the assessment of QTS. ITT providers must ensure that they communicate to

their trainees that if they are employed to carry out one or more of the activities described above at the same time they receive the bursary, this would count as paid teaching and they will become ineligible.

78. ITT providers are advised to make it clear to trainees that they cannot undertake paid teaching work as outlined above and receive the bursary at the same time.

Criterion 6: The trainee must be taking a qualifying postgraduate ITT course.

79. To be eligible to receive a bursary, the trainee must be taking, and continuing to take, a qualifying postgraduate course. A qualifying postgraduate ITT course is:

- a course that, if successfully completed, will enable a trainee to be recommended for the award of QTS; and
- a postgraduate ITT course provided by an institution that has been accredited, and remains accredited, by NCTL or one of its' predecessor organisations (the Teaching Agency (TA) or the Training and Development Agency for Schools (TDA)) to provide ITT.

Criterion 7: The trainee must not be undertaking any other ITT course, scheme or programme.

80. To be eligible for the training bursary, trainees must not be undertaking any other ITT course, training scheme or programme leading to QTS.

Criterion 8: The trainee must be notified by their ITT provider in writing that they are eligible.

81. The provider will determine whether a trainee is eligible to receive a bursary and whether they continue to receive it.

82. The trainee must be informed in writing, by their provider, that they are eligible.

83. They do not become eligible for a bursary until the date the provider has made that determination and informed the trainee of their decision.

84. ITT providers should ensure that trainees are informed of whether they are eligible for the bursary in good time before the start of their ITT course.

Criterion 9: The trainee must comply with the terms and conditions of the new bursary scheme.

85. Trainees must agree in writing to comply with the terms and conditions of the bursary scheme, including:

- promptly informing their ITT provider of any changes in their bank and address details,
- promptly informing their provider of their intention to withdraw, and

- signing a declaration of understanding that they will be expected to seek a teaching post in England upon completion of their ITT if they are in receipt of a bursary and undertaking a designated route to QTS.

86. ITT providers must make clear in their terms and conditions the implications of not completing the course. Please see Section 11 for more detail.

87. The terms and conditions must also make clear how the ITT provider intends to pay the trainee. Please see Section 11 for more details on payment patterns.

88. If a trainee is found to be ineligible for the bursary, the provider must look to recover bursary payments from the trainee.

Section 7 – Subject Knowledge Enhancement trainees

89. Pre-initial teacher training subject knowledge enhancement (SKE) programmes are designed to help potential trainees gain the depth of knowledge needed to train to teach their chosen subject. These programmes can be delivered prior to starting or alongside, the ITT programme, but must be completed before a recommendation to award Qualified Teacher Status (QTS) can be made. Arrangements for SKE for 2014/15 have now been published and you can find the guidance and funding documents on our webpage.

90. SKE funding will be available to any ITT providers and School Direct lead schools who have received allocated places in the subjects set out in the SKE operations manual.

91. In certain circumstances, trainees who have accepted an NCTL-allocated place on pre-ITT SKE programmes may be eligible for an SKE training bursary. The SKE operations manual contains details about the availability and amount of SKE training bursary that may be requested for applicants in addition to the programme costs.

92. Please direct any queries to the NCTL SKE policy team at:

TA.SKE@Education.gsi.gov.uk

Section 8 – Trainees who teach outside of England

93. NCTL will look at the employment statistics of newly qualified teachers (NQTs) and where they take up a teaching post, to inform future allocations.

94. ITT providers are asked to be mindful that trainees who are not domiciled in England may look to seek a teaching post outside of England once they have qualified. ITT providers will be expected to seek assurances from trainees that they understand that they will be expected to seek a teaching post in England if they are in receipt of a bursary.

95. ITT providers are reminded that a high volume of NQTs trained at their institutions who do not go on to take up a teaching post in England, may have a negative effect on future allocations.

96. NCTL will collect data on trainees who are not domiciled in England and are accessing postgraduate bursaries. NCTL reserves the right to request further information from ITT providers with high levels of trainees who are domiciled outside of England.

Section 9 – School Direct (tuition fee) bursaries

97. Home or EU trainees, who are training on School Direct (tuition fee), may be eligible for a bursary depending on their degree class and the subject in which they wish to train to teach. A full list of eligible ITT subjects can be found in Annex A. Trainees undertaking this route in a non-eligible ITT subject will not be eligible for the bursary.

98. ITT providers are responsible for the management and administration of bursary payments, including assessment of eligibility and awarding the bursary to the trainee. This also includes drawing up terms and conditions relating to receipt of the bursary. In cases where providers pay the Student Loans Company (SLC) to administer the bursary, providers remain responsible for the management of this funding.

99. ITT providers must work with their lead school who will advise of the schools in the partnership and the main school/s in which the trainee will train, to ensure that the correct information is made available in order to complete the data collection. The ITT provider with whom the School Direct (tuition fee) route is delivered will be required to return this information at the time of the census collection in October 2015.

Section 10 – Scholarships programme

100. The Department for Education is jointly awarding scholarships in physics, chemistry, mathematics and computing in partnership with a number of leading professional bodies. These are available to eligible trainees on eligible PGCE routes with a 2:1 or first degree. The scholarships are worth £25,000 and are open to any eligible physics, chemistry, mathematics or computing course leading to QTS in England, including School Direct (tuition fee) courses in these subject areas. Computing trainees who do not gain a scholarship will be subject to the standard bursary award.

101. NCTL will be responsible for administering the £25,000 payment to ITT providers who are training scholars and the funding will be included within the training bursary funding. This will be administered in the same way as the top tier bursary award for the relevant subjects and the award will be weighted. Please see Section 12 for more information on how the award will be paid to trainees.

102. Trainees must hold a degree with at least second class honours or equivalent, to initially apply. However, trainees with degrees below 2:1 must possess strongly evidenced relevant degree-level subject knowledge to be considered for the next stage of the application process. Trainees who do not hold a degree at 2:1 or above can still be considered for a scholarship by taking into account additional experience/qualifications.

103. Trainees will be assessed by the relevant professional body for eligibility for the scholarship, and will be informed by the body in writing that they have been recommended for the scholarship. The trainee must have secured an eligible physics, chemistry, mathematics or computer science PGCE place by 1 September, for the scholarship to be validated. Successful scholars will inform the provider once they have been offered a place.

104. It is not necessary for candidates to have secured a physics, chemistry, mathematics or computing place prior to applying for the scholarship, and they may apply for the scholarship at any time before.

105. ITT providers must ensure scholarships are identified in their trainee record.

106. The decision for entry to an eligible physics, chemistry, mathematics or computing course lies with the ITT provider, and scholars must meet, and continue to meet, all conditions of eligibility as set out in Section 6 of this guide before they can receive the bursary. A trainee who has been recommended for a scholarship but is unsuccessful in securing a place on an eligible course by 1 September 2015, will lose their scholarship entitlement.

107. Trainees who are not awarded the scholarship will continue in 2015/16 to be eligible for the standard bursary as set out in Section 2, providing they are successful in securing a physics, chemistry, mathematics or computing place. Trainees with queries regarding the scholarship and assessment are advised to contact the relevant society as follows:

- Physics – [Institute of Physics website](#);

- Chemistry – [Royal Society of Chemistry website](#);
- Mathematics – Institute of Maths and Its Application (IMA) in collaboration with the London Mathematical Society (LMA) and the Royal Statistical Society (RSA). All queries should be directed to [IMA via their website](#);
- Computer Science – [British Computer Society website](#).

Section 11 – Bursary and scholarship payments

108. The ITT Implementation Plan, published in November 2011, set out that payment of the new bursary awards would be phased over the duration of the course as an incentive to complete, with some weighting applied to the two awards.

109. Trainees should receive their bursary award in equal monthly instalments throughout the academic year. However, trainees in receipt of the larger awards will receive two enhanced payments over the duration of their training.

110. The bursary awards are not taxable. However, they may be treated as capital income for the purposes of assessing income for trainees in receipt of state benefits, as with student maintenance loans. ITT providers are advised to direct trainees towards their local benefits office to check whether this may affect their state benefits.

Bursary awards at £12,000 and below for full-time courses

111. Bursary awards of £4,000, £9,000, £10,000 and £12,000 should be paid in equal monthly instalments over the duration of the course. The standard payment months for full-time courses are October to July of the academic year. The payment structure for bursary awards at £12,000 and under is set out in Figure 3.

Figure 3: Bursary payment schedules for awards at £12,000 and under to trainees studying full-time

Bursary award	Payment schedule
£4,000	10 equal monthly instalments of £400, from October to July
£9,000	10 equal monthly instalments of £900, from October to July
£10,000	10 equal monthly instalments of £1,000, from October to July
£12,000	10 equal monthly instalments of £1,200, from October to July

Bursary awards at £15,000 and above for full-time courses

112. Bursary awards that are set at £15,000 and above should be paid so that a trainee receives equal monthly instalments for the duration of their course, with additional payments at two points during their training, which will make up their total bursary award.

113. The additional payments should be paid in the February of the trainee's ITT course and either July, or the final month in which the trainee successfully completes their ITT course. The trainee will have to satisfy two conditions in order to receive these enhanced payments, which are:

- That the trainee is present on programme at 1 January 2014; and,
- That the trainee completes their ITT programme.

114. The trainee would need to be on course at 1 January 2015 to receive the first enhanced payment, as this aligns with when the trainee has to be registered with the Student Loans Company (SLC) in order to receive student finance monies for their second term. The trainee would need to have completed the ITT course, to receive the second enhanced payment. Trainees who are on programme at 1 January 2015, but leave before the start of the second term payment point in February, will not receive the first enhanced payment.

115. Figure 4 sets out the pattern of payments for trainees on full-time courses in receipt of awards that are set at £15,000 and above.

Figure 4: Bursary payment schedules for awards at £15,000 and above to trainees studying full-time

Bursary award	Payment schedule
£15,000	10 equal monthly instalments of £1,200, from October to July with additional payments of £1,500 in February and £1,500 in July or the final month in which the trainee completes the course
£20,000	10 equal monthly instalments of £1,400, from October to July with additional payments of £3,000 in February and £3,000 in July or the final month in which the trainee completes the course
£25,000	10 equal monthly instalments of £2,000, from October to July with additional payments of £2,500 in February and £2,500 in July or the final month in which the trainee completes the course

Bursary awards at £12,000 and below for part-time and modular courses

116. Trainees on part-time courses may be paid in larger instalments over the duration of the course, but ITT providers must ensure that no more than 50 per cent of the award is paid in any one instalment.

117. ITT providers can continue to pay the bursary award at the start and end of the course and the other half upon recommendation for QTS. However, the payments should be not be weighted in such a way that they present cash flow problems to the trainee.

118. As part-time courses will span more than one academic year, ITT providers may award the bursary outside the period of October to July. ITT providers are reminded that any bursary payments made after 31 July of the academic year will be included as expenditure for the following academic year.

119. Figure 5 sets out the payment patterns for paying the bursary to trainees on a part-time or modular programme.

Figure 5: Bursary payment schedules for awards at £12,000 and under to trainees studying on part-time or modular courses

Bursary Award	Payment schedule
£4,000	<p>2 equal payments of £2,000 at the start and end of the course or</p> <p>2 equal payments of £1,333 during the course plus 1 of £1,334 or</p> <p>Flexible payment plan for modular course ensuring that no more than £2,000 is paid in one instalment</p>
£9,000	<p>2 equal payments of £4,500 at the start and end of the course</p> <p>3 equal payments of £3,000 during the course</p> <p>Flexible payment plan for modular course ensuring that no more than £4,500 is paid in one instalment</p>
£10,000	<p>2 equal payments of £5,000 at the start and end of the course</p> <p>2 equal payments of £3,333 during the course plus 1 of £3334</p>

Bursary awards at £15,000 and above for part-time and modular courses

120. Trainees studying on part-time or modular courses, who are in receipt of the larger bursary awards, may continue to receive the bursary award in instalments as outlined for the smaller bursary awards. However, as with the larger full-time awards, they will be subject to weighting depending on attendance and completion of the course, as with the larger awards for full-time trainees.

121. The trainee will receive the enhanced payments at the end of the first half of their programme, and upon completion. The trainee will have to satisfy two conditions in order to receive these enhanced payments, which are:

- That the trainee is present on programme at the end of the first half of their programme; and
- That the trainee completes their ITT programme.

122. Figure 6 sets out the payment patterns for awards over £15,000 for trainees on part-time and modular courses.

Figure 6: Bursary payment schedules for awards at £15,000 and above to trainees studying on part-time or modular courses

Bursary award	Payment schedule
£15,000	Flexible payment pattern of instalments, the total of which should not exceed £12,000, with 1 additional payments of £1,500 at the end of the first half of the programme, and 1 further payment and upon completion of the programme
Bursary award	Payment schedule
£20,000	Flexible payment pattern of instalments, the total of which should not exceed £14,000, with 1 additional payments of £3,000 at the end of the first half of the programme, and 1 further payment and upon completion of the programme
£25,000	Flexible payment pattern of instalments, the total of which should not exceed £20,000, with 2 additional payments of £2,500 the first at the end of the first half of the programme, and the second upon completion of the programme

Withdrawals

123. Eligible trainees who withdraw from their course are entitled to be paid the training bursary for each month up to, and including, the month in which they withdrew. Trainees will only be entitled to receive the bursary payment for that month if they were still on the course at the time the payment was made.

124. In the event of withdrawal, the provider must suspend all bursary payments to the trainee immediately and ensure that their records are updated to reflect the withdrawal. The NCTL will not reimburse ITT providers who have paid the training bursary in error to trainees who have already withdrawn. The NCTL expects ITT providers to recover any overpayment of bursary from trainees. ITT providers should not make any pro rata training bursary payments to trainees.

125. For additional payments, a trainee who withdraws after 1 January 2016 will not receive their additional payment in February.

Returning trainees

126. Returning trainees who leave and then re-join their course will normally only be eligible to receive up to the value of the bursary award applicable in the year they started the course. In extenuating circumstances, where the length of the course is increased and the trainee needs to complete a longer period of training than expected, ITT providers should contact the NCTL at: FA.Team@education.gsi.gov.uk

127. If a trainee leaves one ITT course which started after 1 August 2015 and joins a new one and carries with them advanced standing or credit from their previous ITT course, and is being charged a new tuition fee, this is viewed as a separate route to QTS. However, trainees who have already received a full bursary award on a previous route to QTS will not be eligible for another bursary.

128. If a trainee does not take any advanced standing or credit from the previous ITT course, then this is viewed as a single route to QTS. Therefore, the trainee will only be eligible for a training bursary up to the value agreed at the start of their course. This does not apply to trainees who started their ITT before 1 August 2013.

129. Where trainees are not charged a tuition fee because they are either repeating or returning after withdrawal, they will not be eligible for a new bursary award. Scholarship payments at £25,000

130. In accordance with the ITT Implementation Plan, payment of scholarship awards will be phased over the duration of the course to incentivise completion. Figure 7 sets out the pattern of payments for trainees studying full time or part time or modular courses.

Figure 7: Payment schedules for Scholarship awards at £25,000

Scholarship award and mode of study	Payment schedule
£25,000 – trainees studying full-time	10 equal instalments of £2,000 from October to July with enhanced payments of £2,500 in February and £2,500 in July or the final month in which the trainee completes the course
£25,000 – trainees studying part-time or on modular courses	Flexible payment pattern of instalments, the total of which should not exceed £20,000, with 2 additional payments of £2,500 (one at the end of the first half of the programme, and one on completion of the programme)

School Direct (tuition fee) bursaries

131. ITT providers should allocate School Direct (tuition fee) bursary awards, in monthly instalments at the start of the trainee’s programme.

132. School Direct (tuition fee) bursaries should be managed in the same way as the standard mainstream bursaries, the details of which are set out above.

Section 12 – Monitoring, assurance and data requirements

Monitoring and Assurance

133. ITT providers must hold full records of all trainees in receipt of bursaries, including details of the trainees' academic qualifications achieved prior to starting their ITT. Trainees must be in receipt of the degree on which they are assessed, prior to starting the course. The NCTL reserves the right to request these details at any point during the academic year from ITT providers, for the purpose of monitoring quality.

134. The NCTL will seek rigorous assurance about the bursaries allocated, via the annual and interim census data collections and the annual audit grant reporting process, both of which will need to be verified by the ITT institution's responsible officer.

135. The NCTL will review allocated training bursary funding that ITT providers receive and reconcile this amount with the trainee records submitted at each census point. Funding will be adjusted at these points to meet the actual amount required. Where funding received has exceeded the total amount required for actual trainees, the NCTL will seek to recover the excess by means of invoice.

136. ITT providers are reminded of the need to ensure that all trainee records on the Data Management System are complete. Where there is a lack of accurate or complete data, this may result in provider payments being delayed until the data can be corrected.

137. The NCTL will carry out a reconciliation exercise between the bursaries allocated, and the actual trainee records as confirmed by the HESA and SCITT data collection exercises. In the event of any variances, particularly with regard to unclassified degrees, the NCTL reserves the right to contact ITT providers to request explanations of the variances and to seek further information. ITT providers who have paid bursaries to trainees who are found to be ineligible will not be reimbursed for any expenditure and funding will be adjusted accordingly following the submission of the audit grant report.

Data requirements and reporting

138. Schools and ITT providers are required to share data on School Direct with NCTL, including data on applications, recruitment and employment outcomes.

Data requirements from schools

139. Once a candidate has been recruited, lead schools are required to give accurate data to their partner ITT provider regarding the schools the trainee is undertaking their training in. This must include the dates of the training periods so that this can be uploaded onto the Data Management System.

Data requirements from ITT providers

140. Failure to comply with requests for data may result in non-compliance for the ITT provider, which may lead to eventual withdrawal of accreditation. If this does happen the lead school would have to find a new accredited ITT provider with whom to work.

HEI providers

141. Trainee data will be collected via the Higher Education Statistics Agency (HESA) ITT In Year Record. Providers need to submit trainee level data. Trainees will have a teacher training course codes which are to be confirmed.

142. Once the data has been imported into the HEI Data Management System for each trainee, School Direct ITT providers are required to indicate the lead school and up to five schools where the trainee will be undertaking their training during their ITT course.

143. Details of the process are available in the HEI DMS guidance document which is available to users of the HEI DMS. Further information on this is sent out before the start of each new academic year. HEI providers can contact the helpdesk via TASupport@Texunatech.com to gain access to the HEIDMS.

Non-HEI providers

144. Non-HEI ITT providers need to submit trainee level data. Provider or School Direct trainees can be identified by selecting the appropriate route options on the trainee form. For School Direct, ITT providers will be required to indicate the lead school and up to five schools where the trainee will be undertaking their training during their ITT course.

145. Full details of the process are available in the NCTL DMS guidance document which is available to users of the NCTL Data Management System. Further information on this is sent out before the start of each new academic year. New users can contact the helpdesk via <mailto:SchoolsDMSsupport@texunatech.com> to gain access to the NCTL DMS.

Annex A: List of subjects eligible for a bursary

Subject/Phase	15/16 bursaries			
	1st	2.1	2.2	Other
Primary	£9,000	£4,000	£0	£0
Primary maths specialist/m	£12,000	£12,000	£12,000	£9,000
Art & Design	£0	£0	£0	£0
Biology	£15,000	£12,000	£10,000	£0
Business studies	£0	£0	£0	£0
Chemistry	£25,000	£20,000	£15,000	£0
Computing	£25,000	£20,000	£15,000	£0
Design and Technology	£12,000	£9,000	£4,000	£0
Drama	£0	£0	£0	£0
English	£9,000	£4,000	£0	£0
Geography	£12,000	£9,000	£4,000	£0
History	£9,000	£4,000	£0	£0
Maths	£25,000	£20,000	£15,000	£9,000
Modern and ancient languages	£25,000	£20,000	£15,000	£0
Music	£9,000	£4,000	£4,000	£0
Others	£0	£0	£0	£0
PE	£0	£0	£0	£0
Physics	£25,000	£25,000	£15,000	£9,000
RE	£9,000	£4,000	£0	£0

Notes

- The bursary level and award is dependent on the subject in which a trainee wishes to teach and the outcome of their highest qualification.
- Classics with a languages bias such as Latin or Greek will receive a bursary under the Modern languages heading.
- Engineering and manufacturing receive a bursary under Design and technology heading.
- Modern languages listed as 'languages' in the bursary subjects. 'Modern language' includes any modern language and classics with a languages bias such as Latin or Greek.

Annex B: List of relevant degree subjects for maths and physics bursaries based on good A levels

Relevant degree is the definition used by the School Workforce Survey. The following subjects are considered to be a relevant degree subject to enable trainees to become eligible for a bursary (depending on their A level), if training in maths and physics.

Maths

G100 - Mathematics

G200 - Operational Research

G300 - Statistics

G900 - Others in Mathematical and Computing Sciences

Physics

F200 - Materials Science

F300 - Physics

F500 - Astronomy

H100 - General Engineering

H200 - Civil Engineering

H300 - Mechanical Engineering H400 - Aerospace Engineering H500 - Naval Architecture

H600 - Electronic and Electrical Engineering

H700 - Production and Manufacturing Engineering

H900 - Others in Engineering

For physics above, the subjects in bold are considered as 'Mapped subjects 1', meaning they hold a degree level qualification to teach physics. The other subjects are 'Mapped subjects 2', meaning that they hold a degree level qualification to teach engineering primarily but also physics. There are no second mapped subjects for maths.

Change log

Version	Published Date	Changes made



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Teaching & Leadership

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