

Consultation Response Form

DIS2019-07/19

Your name:

Organisation (if applicable):

Are you responding on behalf of the organisation? Yes No

E-mail / telephone number:

Are you responding from outside of Wales? Yes No

Country Nationality

Question 1

The three goals set out in the strategy are:

- to raise Wales' international profile
- increase exports and inward investment
- showcase Wales as a globally responsible nation.

These goals have been developed to bring coordinated outcomes to the international work being undertaken by the Welsh Government and its partners.

Do you agree with these goals? (mark one box with an X)

Yes Partly No

Are there any other goals that should be considered? Yes No

If you answered yes, please write these goals in the box below.

Background

- i. Universities Wales represents the interests of universities in Wales. Our mission is to support a university education system that transforms lives through the work Welsh universities do with the people and places of Wales and the wider world. This response has been put together in consultation with all eight Universities in Wales.
- ii. Universities Wales welcomes the commitment for a new refocused strategy that sets out an international vision for Wales. We welcome the opportunity to contribute to that vision and believe that higher education should be embedded in the strategy as a key partner, ensuring the widest possible benefit to Wales.
- iii. We are pleased to see that the strategy recognises the ways in which higher education contributes to the Welsh economy and Wales' international profile. Universities are the most international institutions in Wales with staff, students and visitors from around the world with global education and research collaborations. Our universities in Wales are internationally competitive and a major economic asset, that bring widespread benefits to individuals, communities, the nation as a whole and government in Wales.
- iv. Universities in Wales have a greater relevant economic importance to the Welsh economy than universities elsewhere in the UK and play a prominent role in the foundational economy through spending by universities, staff, students and visitors.
- v. In 2015/16 Welsh universities generated £5 billion of output. Our universities are equally spread and benefit the whole of Wales geographically. 21% of the GVA generated by Welsh universities was generated in local authority areas which do not have a university presence. Similarly, of the 49,216 jobs generated by universities, 11,024 were in parts of Wales that do not have a university presence.¹ They make a valuable contribution to a dynamic, outward-facing and competitive Wales and play a central role in strengthening our international trade and diplomatic relationships.
- vi. Higher education is a key export, Welsh universities generate £544 million in export earnings annually; that's 4.1% of all Welsh exports.
- vii. Universities are an integral part of Wales' relationship with global partners, attracting international recognition, through student and staff recruitment; student and staff mobility; research activities and collaborations. The eight Welsh universities together with the Open University, have been partners, collaborators and innovators in many areas across the sciences, technology, health, social sciences and humanities with transformational benefits for Wales, the rest of the UK and for Europe. The strategy should further recognise the international opportunities that universities can generate, from trade and investment, skills, and tourism to wider soft power objectives.
- viii. Global Wales is a project led by Universities Wales in partnership with Welsh Government, the Higher Education Funding Council for Wales (HEFCW) and British Council Wales. It aims to build sustainable international partnerships for Wales, through higher education, and research and promote Wales as a study destination.

- ix. Global Wales aims to support the higher education sector as an export industry and as a key component of Wales' soft power. Working with government, industry and others, universities and the Global Wales partners have a key role in: building Wales as a nation; increasing visibility and exports; and affecting a dynamic change in how we all pursue our overseas interests.
- x. Understanding the regional, national and international nature of our universities will grow increasingly important in the coming years when, as noted by the Diamond Review, it is likely that there will be a 'shift towards higher qualifications and growth at the higher skilled end of the labour market'². A well-educated and highly skilled population is essential for the future of Wales' position on the global stage.
- xi. Universities Wales, as the representative body of the sector, runs an International Network to obtain sector advice and guidance on our international agenda. This group also acts as a useful means of disseminating and gathering information. We propose that a Universities Wales representative takes part in the biannual meetings³ and sits on any relevant stakeholder group for the delivery of the strategy and feeds back to the International Network. This will be key for ensuring facilitation and delivery.
- xii. Universities Wales look forward to further discussions with the Welsh Government to clarify and refine aspects of the strategy and to work together to achieve the goals it sets out.

Question 1

- a. Higher education in Wales will be a key driver in delivering all three goals and should be more clearly recognised in this strategy.
- b. Universities Wales broadly supports the key goals as part of an holistic approach to enable Wales to project itself as an outward looking nation and economy on the international stage.
- c. We agree with the importance of partnership and collaboration highlighted in the strategy. Collaboration with international partners is key to our strength and suggest that an additional goal could be developing and strengthening Wales as an international partner. An international outlook that welcomes people from around the world to Wales and looks to build partnerships will be a vital part of Wales success as a country.
- d. The Global Wales project serves to build and develop partnerships by promoting Wales as a partner of choice for system to system engagement with government and other bodies overseas. It has enabled the establishment of a prestigious Wales-Vietnam Chevening scholarship programme aimed at developing global leaders, and a similar arrangement

¹ <https://uniswales.ac.uk/media/Unis-Wales-international-student-research.pdf>

² <https://beta.gov.wales/sites/default/files/publications/2018-02/higher-education-funding-final-report-en.pdf>

³ <https://gov.wales/sites/default/files/consultations/2019-07/190731-draft-international-strategy-for-wales-consultation-document.pdf>

in India is being finalised. It has also facilitated a partnership agreement with five key universities in Vietnam which supports higher education reform activity and promoted research collaboration opportunities between our two countries, such as in SMART cities and agriculture.

- e. Building stronger system to system relationships in these partner countries and more emerging markets will create more and deeper connections between Wales and the world – boosting soft power and making Wales more attractive for trade and foreign direct investment. If these meaningful relationships aren't developed, the investment and students will go elsewhere.
- f. Wales is a valuable partner in many European research and innovation collaborations and it is vital that this continues despite the uncertainties around the future EU-UK relationship. Wales and Welsh universities have benefited greatly from European programmes, from collaborating with colleagues across Europe and being a partner in many projects across a wide range of areas.
- g. The Welsh Government's annual report on Horizon 2020 participation highlights that Wales has had 2,820 international collaborative links with 70 countries and 1,695 non-UK organisations to date during the framework programme.⁴ As of March 2019 over €75.5 million (70%) of all Welsh Horizon 2020 funding has been awarded to Welsh universities.⁵ There are also many links developed through other European programmes such as Interreg with the Ireland-Wales programme⁶ as well as Welsh participation in Interreg North-West Europe, the Atlantic Area programme and other wider Interreg policy strands.
- h. It would be useful for the strategy to highlight some of the existing links provided by education and research collaborations that connect Wales to the world, for example, Swansea University's long-standing partnership with Texas which has created opportunities for the Welsh Government to advance in key areas of business in the higher education sector.⁷ There are many collaborations that have been supported by European funding and these links already contribute to raising Wales' international profile and hopefully can continue to do so even if the wider UK-EU relationship changes.
- i. In relation to the Welsh economy the strong links between our universities and businesses including SMEs is important to note. A number of research collaborations involving Welsh universities such as ASTUTE, SPECIFIC, FLEXIS and BEACON⁸ have received European funding from Structural

⁴ Welsh Government, *Horizon 2020 in Wales Annual Report for 2018, 2019*

⁵ WEFO, Horizon 2020 funding, March 2019

⁶ <https://irelandwales.eu/>

⁷ <https://www.swansea.ac.uk/press-office/news-events/news/2019/09/university-celebrates-forging-closer-bonds-with-texan-partners-.php>

⁸ www.astutewales.com/en

www.specificeu.com

www.flexis.wales

www.beaconwales.org

Funds involve universities, businesses and industry across Wales and beyond. These are important connections to Welsh export and inward investment agendas as these collaborations advance innovation in Welsh business and industry.

- j. Welsh Universities would welcome the opportunity to work with the Welsh Government to consider how higher education and research can contribute to the development of the action plans mentioned in the strategy. Welsh universities already have strong connections to a number of the priority regions identified in the draft strategy with university partnerships, staff mobility and research collaborations with the priority regions and beyond. However, it would be helpful if the international strategy recognised more fully the role that education and research play in building international links.

Question 2

People – the strategy highlights the important role that our people and cultural organisations, in Wales and overseas, can play in raising Wales’ international profile.

Do you agree with the ambitions set out in this chapter? (mark one box with an X)

Yes

Partly

No

If you answered ‘Partly’ or ‘No’, please tell us what would you add, and why, in the box below.

2.1 It would be useful to highlight the value of international staff and students coming to work, study and live in Wales. It is significant in academic, cultural and economic terms. International students represent 17% of students in Wales. The 22,000 international students and 2,500 international staff across Wales’ universities from 140 countries internationalise Welsh campuses and towns (2015/16).⁹

2.2 In 2017/18 there were 1,485 EEA nationals working in Welsh universities, accounting for 7% of the total workforce and this proportion rises to 11% amongst the academic workforce.¹⁰

2.3 Viewforth Consulting report published in 2017 using 2015/16 data details the economic benefit of non-UK students for Wales:

- Every non-UK student generated £54.2k of Welsh output
- One Welsh job was generated by every nine non-UK students in Wales
- Every non-UK student generated £27.8k of Welsh GVA¹¹

⁹ <https://uniswales.ac.uk/media/Unis-Wales-international-student-research.pdf>

¹⁰ Higher Education Statistics Agency 2017/18 dataset

¹¹ Kelly, U and McNicoll, I, *The Economic Impact of International Students in Wales*, Viewforth Consulting, November 2017

- 2.4 The contribution of international students based in Wales to the UK economy was estimated to be **£0.9bn**¹².
- 2.5 It would also be useful to highlight the particular role of universities in bringing people from around the world to Wales. An estimate of 56,136 international visits in 2015/16 attracted as a result of a friend or family member studying in Wales, with an average spend per visit of £398 ¹³.
- 2.6 There are clearly a range of other benefits that extends beyond monetary outcomes associated with international students, including cultural diversity, adding value to UK students and Wales' global soft power. Welsh students benefit from studying and living alongside students from around the world and build international contacts and an understanding of other cultures that equips them for an increasingly globalised labour market.
- 2.7 By attracting students from abroad, the higher education sector is contributing, both immediately and in the longer term, to the wider prosperity and wellbeing of Wales, raising the country's profile internationally, and attracting investment and trade links, as well as the soft power that Wales may exert overseas.
- 2.8 Outward mobility from Wales should also be viewed as part of our international strategy as people heading from Wales to study, live and work overseas can be powerful advocates and ambassadors for Wales.
- 2.9 In Wales, data shows that 9.7% of the 2016–17 graduating cohort – 1,305 students - had at least one period abroad as part of their undergraduate first degree. Mobile graduates were more likely to obtain first-class honours or an upper second-class degree (86.1%) than nonmobile graduates (77.9%). and just six months after graduating only 2.2% of mobile graduates were unemployed, compared to 3.2% of non-mobile graduates. ¹⁴
- 2.10 This should be an important dimension of our international strategy in developing people with an international outlook. For this reason, Universities Wales welcomes the Minister for Education's Outward Mobility pilot supporting the mobility of Welsh domiciled students from widening-participation backgrounds.
- 2.11 In 2016/17, 800 students from Welsh universities took part in the Erasmus+ programme.¹⁵ Not only does this help create a worldwide network of relationships with the connections it provides for Wales, research shows that students who spend some time abroad working, studying or volunteering achieve better degrees and get better jobs, and the number of students going abroad is rising each year.¹⁶ This is particularly true for those from the least advantaged backgrounds, who are least likely to go abroad, but benefit

¹² <https://www.hepi.ac.uk/wp-content/uploads/2018/01/Economic-benefits-of-international-students-by-constituency-Final-11-01-2018.pdf>

¹³ http://www.uniswales.ac.uk/media/UNI010-Economic-Impact-Report_FINAL.pdf

¹⁴ https://www.universitiesuk.ac.uk/policy-and-analysis/reports/Documents/International/2019/GoIntl2019_W.pdf

¹⁵ HEFCW data 2016/17

¹⁶ Go International, Universities UK International, *Gone International: Rising aspirations (report on the 2016–17 graduating cohort)*, 2019

disproportionately in terms of academic outcomes and employment when they do.¹⁷

2.12 Universities Wales strongly supports continued participation in Erasmus+, if this was not possible, to be part of a UK-wide replacement scheme. If Wales can participate in the new programme there is the potential to significantly increase the numbers of students from Wales who experience living, studying or working overseas which will build a cohort of people used to working internationally.

2.13 Similarly, a key feature of the new Erasmus mobility programme will be a commitment to widen participation in mobility to encourage those from under-represented groups to participate through greater flexibility in mobility opportunities.

2.14 In 2017/18 there were 26,980 students studying for Welsh university degrees overseas¹⁸. This is known as transnational education (TNE) and is becoming an increasingly important component of most universities' international strategies. It is also a recognised pathway for recruiting international students. While the economic returns of TNE are much less significant than onshore recruitment, research indicates that TNE plays a critical role in attracting future international students to on-shore programmes, and supports a range of strategic agendas for universities, and for the UK more generally.¹⁹

2.15 It also offers opportunities to access world-leading UK higher education to a wider range of people than would be able to benefit if required to travel to study in the UK, contributing to the goal of expanding access to education in emerging and developing economies. Effective, reciprocal TNE partnerships also help build longer-term capacity in domestic higher education systems. It should therefore play a role in Wales demonstrating global responsibility by engaging in transnational cooperation that benefits all countries involved.

2.16 Welsh universities are part of a world-class HE system. To retain this enviable position and the economic and social benefits that come with it, it is critical that they continue to recruit genuine international students and world leading academics and researchers from around the world.

2.17 Universities Wales strongly welcomes the specific reference to increase the number of international students studying in Wales²⁰. The UK Government set out highly ambitious targets in its International Education strategy published in March 2018. It is jointly managed by the Department for International Trade and the Department for Education in an effort to improve cross-departmental working and has set a very ambitious target of increasing the value of UK education exports to £35 billion by 2030 (a 75% increase). The current export

¹⁷ <https://www.universitiesuk.ac.uk/International/news/Pages/gone-international-value-mobility.aspx>

¹⁸ <https://www.hesa.ac.uk/data-and-analysis/students/where-from/transnational>

¹⁹ <https://www.universitiesuk.ac.uk/policy-and-analysis/reports/Pages/scale-and-scope-of-uk-he-tne.aspx>

²⁰ <https://gov.wales/sites/default/files/consultations/2019-07/190731-draft-international-strategy-for-wales-consultation-document.pdf>

value of education as a UK sector is £20 billion. This increase relies to a large extent on increasing international student numbers in the UK to 600,000 by 2030 (an increase of almost 40%).

- 2.18 The Welsh Government should be equally ambitious. Drawing on Universities UK analysis on education strategies from a range of countries, including both direct competitors and emerging challengers, including Australia, New Zealand, Germany, Canada, France, Japan, Ireland, Finland and Sweden, it is clear that any approach should aim to significantly grow education exports, set clear targets, and help to provide the policy frameworks and operating environment that would allow higher education in Wales to (a) fulfil its potential and enhance its position as a global leader in higher education and research, and (b) consequently make an even greater contribution to economic growth.
- 2.19 A realistic and achievable target, taking into account that immigration policy is not devolved, might anticipate the gradual return to recruitment levels seen before the close of the post study work route (2012) and a return to current (pre-Brexit) levels of EU student numbers, at a minimum, increasing education exports to £750 million by 2030 (40% increase) and International student numbers reaching 26,000 by 2030 (20% increase).
- 2.20 The UK Government announcement in September 2019 that two-year post-work visas have been reintroduced is very welcome. It sends the message that our universities are welcoming, and this will help in the recruitment of international students.
- 2.21 The Welsh Government should ensure that, where appropriate, the UK International Education Strategy is delivering for Wales.
- 2.22 Universities Wales strongly welcomes the Global Wales collaboration with Vietnam in the international strategy. Global Wales is a project working with the Vietnam, the US, and India, led by Universities Wales in partnership with Welsh Government, HEFCW and British Council Wales to support the higher education sector as an export industry and as a key component of Wales' soft power.
- 2.23 Global Wales decided to prioritise student recruitment activity in these destinations, following a thorough market research and consultation exercise. The US was selected because of Wales' relatively low market share of US students studying in the UK and is a market that was largely unpenetrated by the Welsh HE sector and presents a huge opportunity in raising the profile of Wales and delivering investment. We welcome the focus on North America in the strategy and Global Wales will be play a key part in ensuring that educational, research, and cultural connections between Wales and the US continue to grow.
- 2.24 Since the establishment of Global Wales and following a number of high-level visits to Vietnam, the Welsh Government has signed an MoU to collaborate with the Vietnam Government on all levels of education. This

should be noted in the strategy. Through this international strategy, Global Wales hopes to see a much wider benefit to Wales emerge from this Vietnam partnership in terms of trade and invest activity and the wider promotion of Wales.

2.25 Universities Wales strongly suggests that India should be added to the international strategy as a significant target market in Wales. India is the second largest market for international student recruitment in the UK (behind China) and is a market that is now growing in Wales. Our universities already prioritise India in their own international strategies, including strong recruitment activity and agency partnerships, well established relationships and, in some cases, offices in country. This market also offers the opportunity to work at state-level on system to system development as India reforms its higher education sector. This approach has been a real success for Global Wales in Vietnam, where the ability of our universities to collaborate with the Welsh Government, HEFCW and British Council to respond to Vietnam's reform agenda has brought about opportunities for partnership development and significantly expanded our network.

2.26 The objectives of the Global Wales programme in India is to

- Increase the number of Indian students studying in Wales.
- Increase the level of awareness of Wales as a quality study destination,
- Support developing partnership work with the South India States.
- Raise Wales' profile internationally.

2.27 Since 2012 and following changes to immigration rules in the UK, recruitment from India declined by almost half. HESA 2017/18 data is illustrating the early signs of a reversal of this decline. In 2013/14, 1773 students from India were studying in Wales, in 2017/18, the number was 783, a decrease of over 55%. By working together in a targeted way, Global Wales, hopes to build on these advances to support the reversal in Indian student numbers in Wales.

2.28 Given that the Welsh Government's strategy makes reference to increase the number of international students in Wales, this is in line with the government's ambition.

2.29 Our Global Wales partners have well-established platforms in India – the British Council education team is active in key regions and is about to embark on its own significant India UK Education Connections (IUEC) programme (2019-2022). The IUEC programme will build on its track record of developing innovative education and English projects in India, building institutional capacity and contributing to systemic change. Similarly, the Welsh Government has long-established Trade & Investment offices in India which can support and develop this agenda.

2.30 The Global Wales India draft strategy identified "expertise" leads to reflect the Welsh research strengths, overlaid with Welsh company profiles and potential demand in India. These are: Cyber security and AI, Creative Industries, Technology, focusing on Data Science, including big data, Sport, Aeronautics and Life Sciences. Two of these directly align with the Welsh

Government priorities. This potentially provides a platform to gain critical mass from marketing campaigns and messaging across a range of outward facing parts of Wales. This will require all facets within Wales to work together.

- 2.31 In addition, there is a strong profile of Indian companies operating in Wales such as Tata and First Sources Solutions, and India offers a strong alumni pool and locations where some Welsh universities have offices.
- 2.32 India and Vietnam should therefore be included in the list of Priority International partnerships in Annex B.
- 2.33 In terms of raising Wales' profile internationally, Universities hold the key to vast global networks through their highly successful alumni base and through their strategic and institutional partnerships and research collaborations. There is scope to do more to create links and opportunities to engage on a pan-Wales basis. However, any activity would require close collaboration with the universities who hold the alumni data and who wish to manage their alumni data carefully.
- 2.34 There is also an opportunity to connect with Welsh alumni in European organisations. There must be a number of graduates from Welsh universities now working in European institutions in Brussels and elsewhere. In relation to Brussels, Welsh Higher Education Brussels (WHEB) would be interested in connecting Welsh graduates and this may be an area of interest to the Welsh Government. It could provide a useful network as Wales will be operating in a different environment in Brussels and European organisations over the next few years.
- 2.35 Regardless of whether we leave or stay in the European Union, Welsh influence in Brussels and our bilateral relationships with key European countries should be among the highest priorities for Wales.
- 2.36 Wales has benefitted from a longstanding presence in Brussels and enjoys strong links with European networks through the WG office in Brussels and the WHEB office. It will be important to maintain a distinct Welsh presence and view in Brussels as we move forward and avoid creating any 'hard lines' between the EU and the rest of the world in the international strategy. This will be crucial if we are to build on and enhance our reputation globally.
- 2.37 We welcome the statement in the draft strategy which states that the Welsh Government will 'push for continued participation in Erasmus+ and Horizon 2020 and any successor programmes – extending this to include international cooperation programmes such as INTERREG and Creative Europe.'²¹ We strongly believe that Wales should maintain its participation in European programmes and continues its engagement with relevant European research and innovation networks.

²¹ International Strategy draft for consultation, Welsh Government

2.38 The impact for Welsh universities of limited or no access to the Horizon Europe programme would significantly undermine Wales' international position. Welsh universities have been very successful in accessing the EU Structural Funds and Investment Funds (ESIF) and are the second largest recipients of ESIF in Wales after the Welsh Government. The ESIF provide vital investment for projects and infrastructure to contribute towards economic and social growth. Welsh universities have been awarded over £280 million from the EU Structural Funds programme since 2014.²² Welsh universities have also received significant funding from the research and innovation programmes, and the territorial co-operation INTERREG programme. In the case of a no-deal Brexit, clear plans to sustain or replace this investment, and devolved to Wales in the case of structural funds, should be included in the strategy.

Do you think the ambition will deliver the key goal to raise Wales' international profile? (mark one box with an X)

Yes

Partly

No

Question 3

Products – Wales has a strong global commercial relationship both in terms of exports and attracting inward investment. The strategy sets out plans to showcase Wales' expertise in cyber security, compound-semiconductors and film and television production to demonstrate we have a modern and vibrant economy. This, in turn, will enhance our wider export and inward investment offer to the rest of the world.

Do you agree showcasing these areas will demonstrate Wales has a modern, vibrant economy and skilled workforce? (mark one box with an X)

Yes

Partly

No

Please use the box below to give a reason for your answer:

3.1 Along with trade and tourism, higher education is arguably the most visible manifestation of Wales overseas.

3.2 Higher education is a key export, Welsh universities generate £544 million in export earnings annually; that's 4.1% of all Welsh exports. This is greater than the value of overseas tourism and food and drink exports which feature strongly in the strategy.

²² <https://gov.wales/eu-structural-funds-programme-2014-2020-approved-projects>

Education should be clearly recognised in the International Strategy, with it listed as a key export sector with an accompanying target.

3.3 One of the benefits of Welsh universities on the economy can be seen in the important role that universities can play in attracting business tourism. The international visitors, conferences and delegations that our universities bring to Wales open up significant opportunities for Welsh businesses as well as help to sell Wales as an attractive destination for foreign investment. This is increasingly recognised and encouraged in many cities across the UK with convention bureaux frequently establishing dedicated 'Ambassador Programmes' to work with university staff in attracting major academic conferences.²³

3.4 Another important feature of strength for Wales is its world-renowned academic reputation. Wales has four universities in the World top 500. In the context of over 60,000 institutions worldwide, being in the top of international rankings shows the strength of our sector.

3.5 Higher education in Wales, similarly to the rest of the UK, is recognised internationally. It is funded and regulated by the Higher Education Funding Council for Wales (HEFCW).

3.6 The Quality Assurance Framework for Wales (QAF) whilst strongly focussed on enhancement, has shared mechanisms with the rest of the UK including meeting the standards as set out in the Quality Assurance Agency (QAA) Quality Code for Higher Education. It also aligns with the Framework for Higher Education Qualifications (FHEQ) and maintains common guidelines for external examiners. The QAF makes use of the European Standards and Guidelines (ESG) as a key reference point. HEFCW have engaged the QAA, who are themselves an internationally recognised quality assurance body (appearing on the European Association for Quality Assurance (ENQA) register), to deliver external quality assurance reviews on a cyclical basis. This helps assure HEFCW of the quality of higher education providers.

3.7 Welsh universities are a leading academic destination for world class research which is often international in scope and delivery²⁴. An example of globally acclaimed research and innovation in North East Wales is Glyndwr University's work for the European Southern Observatory on the European-Extremely Large Telescope (E-ELT) which included constructing an optical test tower compliant with ESO specifications – the only one of its kind in the world.²⁵

3.8 In the Research Excellence Framework 2014, Welsh universities were found to have the highest percentage of world-leading research in terms of its impact of any part of the UK²⁶ and, in 2014, 46% of Welsh publications were internationally co-authored²⁷. As highlighted in the Welsh Government's recent '*Protecting Research and*

²³ http://www.uniswales.ac.uk/media/UNI010-Economic-Impact-Report_FINAL.pdf

²⁴ <https://www.learnedsociety.wales/wp-content/uploads/2017/09/REF15186-Times-Higher-Publication-Online-PDF.pdf>

²⁵ <https://www.glyndwr.ac.uk/en/AboutGlyndwrUniversity/Newsandmediacentre/Newsarchive/PressReleases2015/ESOproject/>

²⁶ <https://www.bbc.co.uk/news/uk-wales-30524940>

²⁷ <https://www.learnedsociety.wales/wp-content/uploads/2017/09/REF15186-Times-Higher-Publication-Online-PDF.pdf>

Innovation After EU Exit paper, the impact of Wales' published research outperforms other parts of the UK and similar sized countries internationally. By working with universities and industry, Welsh Government can really build on this success to create a compelling narrative for Wales.

3.9 The Sêr Cymru programme is highlighted as a multi-million pound initiative designed to bring scientific talent to Wales using Welsh Government funding, EU funding and support from Welsh universities. It has sought to build links between research funding such as Horizon 2020 and cohesion funding provided by Structural Funds to Wales. Within the Sêr Cymru case study provided in the draft Strategy there is a focus on the opportunities for academic leaders. It would also be useful to highlight the opportunities provided by the programme for early-career researchers through co-operation with the Marie Skłodowska Curie Actions strand of Horizon 2020, the fellowships strand and the support for people returning to academic careers.

3.10 In relation to the centres of excellence proposed in the strategy – all important areas where universities, businesses and other organisations work closely together - it is unclear why they are limited to three, and on what basis they were selected. Wales should project itself as a dynamic knowledge economy with areas of excellence spanning from advanced manufacturing and engineering to the creative arts. Wales also has a strong track record of graduate entrepreneurship in these areas. There are a number of globally important areas that the strategy may want to explore, for example smart and flexible energy, nuclear energy, data, manufacturing and health, as already highlighted in the Science for Wales 2012 and 2017 reports.

3.11 Our universities work with and collaborate with many international companies, for example:

- Cardiff University's Airbus Centre of Excellence in Cyber Security Analytics.²⁸
- Cardiff Metropolitan University PDR research institute which uses design as a tool for innovation in the private and public sectors, working with many blue chip companies such as Rolls Royce, Bosch and Dyson.²⁹
- Bangor University's work with Horizon Nuclear Power Ltd.³⁰

3.12 It would be useful for the strategy to make connections to the wider Welsh Government strategies on the Economic Action Plan³¹ and on science and innovation, 'Science for Wales' was first published in 2012 with an update in 2017 and 'Innovation for Wales' first published in 2014. The strategies identified four 'grand challenges' areas that the Welsh Government expect investment in innovation capacity to occur, these are

- Life sciences and health
- Low carbon energy and environment
- Advanced engineering and materials
- ICT and the digital economy

²⁸ Cardiff University, [Airbus Centre of Excellence in Cyber Security Analytics](#)

²⁹ Cardiff Metropolitan University, [pdronline](#)

³⁰ Universities Wales case study, [Nuclear Futures Institute: Developing a world leading capability in nuclear science and engineering at Bangor University](#), November 2018

³¹ <https://gov.wales/sites/default/files/publications/2019-02/prosperity-for-all-economic-action-plan.pdf>

3.13 Universities Wales would not want to deter inward investment. Restricting the centres of excellence to three excludes some significant areas of strength where world-class researchers in Welsh universities are already working:

- Advanced Sustainable Manufacturing Technologies (ASTUTE) supports the stimulation of ideas in the Welsh manufacturing sector through provision of resources, facilities, advice and guidance exploiting the wealth of world-class research in Welsh universities in close research collaborations with industry. It is a collaboration of four Welsh universities; Swansea University, Cardiff University, Aberystwyth University and the University of Wales Trinity Saint David. To date it has created significant economic impact in excess of £200 million in West Wales and the Valleys showing that for each £1 invested an outstanding return of over £8 of economic impact has been achieved.³²
- Flexible Integrated Energy Systems (FLEXIS) is a £24.5 million research operation, led by Cardiff University, Swansea University and the University of South Wales, which brings together expertise from across these universities to facilitate an affordable, sustainable, and socially acceptable transition to a low carbon future. The five-year EU backed project will look to solve a diverse, complex and inter-dependent set of challenges, ranging from energy storage, to decarbonisation and fuel poverty. By 2020, over £20 million of additional competitive research income is expected to be secured in Wales as a result of FLEXIS.³³

3.14 To remain connected to and engaged with partners in Europe, it will be important for Wales to follow and engage with European developments in smart specialisation and innovation. The Welsh Government is playing an active role in the Vanguard Initiative which seeks to encourage economic growth through smart specialisations by regions across Europe. Welsh universities are also involved in the Bioeconomy and Efficient and Sustainable Manufacturing areas of the Initiative. Involvement in these type of networks builds collaboration and engagement.

3.15 There is set to be a large increase in the amount of research and innovation investment available UK-wide – cited in the Reid review as a £2bn yearly increase in the budget of UK Research and Innovation. If Wales does not make the most of these opportunities, then we risk widening the investment gap between Wales and the rest of the UK and, as such, potentially widening the productivity gap. This risk is even more pronounced given the reliance research and innovation in Wales has had on European Structural Funds, the contribution of which is around £65m yearly for innovation. Without adequate investment in research and innovation, the disruptive impact of technological advancement is likely to be exacerbated.

3.16 Universities in Wales carry out research into a wide range of areas which has a transformational impact across all levels of society, including bilingualism, policing, flooding, dementia, childcare, mental health, public housing, renewable energy,

³² Universities Wales case study, *Advanced Sustainable Manufacturing Technologies: Embedding advanced and sustainable technologies into Welsh manufacturing*, November 2018

³³ Universities Wales case study, *Flexible Integrated Energy Systems: Building on the world-class capability that exists in Welsh universities*, November 2018

community violence, poverty, transport management, cancer and agriculture. This clearly shows that research and innovation activity by Welsh universities makes an extensive and wide-ranging contribution to each of the seven well-being goals of the Well-being of Future Generations Act³⁴.

3.17 Universities also play a role in supporting small businesses, including SME's, many of whom go on to export internationally. KESS (Knowledge Economy Skills Scholarships) is a major European Convergence programme led by Bangor University which supports collaborative research projects with external partners based in the West Wales and the Valleys. The project received £73 million from ESF to promote high-level skills development by increasing the research capacity of small to medium-sized enterprises (SMEs) by linking with a PhD or research master's project.³⁵ Eight Welsh universities participate in the KESS 2 programme. The company partners range from SMEs to large companies, social enterprises and public bodies. Research undertaken must fit into the Welsh Government's four Grand Challenge Areas of: Life Sciences and Health, Advanced Engineering and Materials, ICT and the Digital Economy and Low Carbon, Energy and Environment.

3.18 The £36m EU-backed Knowledge Economy Skills (KESS2) scheme³⁶ is part of the European Industrial Doctoral School (EIDS) and will partner with universities across Europe and over 500 businesses with academics and postgraduate research students to develop innovative research projects aimed at driving business growth and to promote higher level skills development.

3.19 Separately, Wales has the highest number of graduate start-ups in the UK per capita. According to Universities' research, Wales has 12.3% of active graduate start-ups in the UK, despite accounting for around 5% of the higher education sector³⁷. An international dimension could be linked into this area to explore ways in which graduate start-ups can be supported to access international markets, boosting employment and creating a sustainable diverse economy in Wales.

3.20 It is vital that cross departmental working recognises the international opportunities that universities can generate, from trade and investment, skills, and tourism to wider soft power objectives. Universities Wales have an excellent working relationship with the Minister for Education and her team on the Global Wales programme. Global Wales also brings together officials from Trade & Invest, International and Brand Wales. While support from these departments in the form of their commitment to the Global Wales programme is valued and appreciated, we believe that there is scope for better cross-departmental working on the international agenda.

3.21 As an initiative to promote higher education at a country level, the Global Wales programme and the Study in Wales brand has seen significant wins internationally, compared to a single institution approach and has leveraged Wales' success compared to activities developed by other countries. For example, In Vietnam with a

³⁴ A prosperous Wales; resilient Wales; healthier Wales; more equal Wales; a Wales of cohesive communities; a Wales of vibrant culture and Welsh language; a globally responsible Wales'

³⁵ Universities Wales case study, Knowledge Economy Skills Scholarships: Developing and retaining research and development skills to strengthen the Welsh knowledge economy, November 2018

³⁶ <http://kess2.ac.uk/about/>

³⁷ <https://www.hesa.ac.uk/news/05-04-2018/business-community-interaction-201617>

whole Wales approach, Global Wales has implemented a tiered programme at Government, sector, institution down to individual recruitment to reach key audiences. This has helped build key relationships and delivered outcomes that perhaps a single institution couldn't, while still achieving these objectives to the benefit of each institution. We would recommend this approach to other sectors in their international engagement.

3.22 We agree that Wales – and Ministers and officials from the devolved administrations – should be involved in discussions with the UK Government about the formulation of the UK's policy position on matters which may be the subject of international negotiations, particularly where these could have important implications for devolved matters.

3.23 In relation to trade and international relations, the UK Government, for instance, has an education team working on future trade agreements. As such, we strongly recommend including the HE sector in Wales as an integral part of the strategy.

Question 4

Place – Wales' culture and language have contributed to international tourism and increased recognition as a visitor destination. In this strategy, we have identified the need to promote sustainable tourism as a priority. Wales has also demonstrated a commitment to global responsibility, for example, through its Wales for Africa programme and our Health Boards.

Do you agree the ambitions set out in the strategy will promote Wales as a globally responsible nation and showcase our commitment to sustainability?

(mark one box with an X)

Yes

Partly

No

Please use the box below to give a reason for your answer:

4.1 Given the rhetoric around Brexit and the wider immigration debate at UK level, it is particularly important at this point to promote and differentiate Wales as open, tolerant, welcoming and friendly to international visitors and residents – including the international students and staff at our universities and their families. Welsh universities also continue to have the highest student satisfaction in the UK and the highest student continuation rates (retention) in the UK. 84% of students (National Student Survey 2017) are satisfied with their “excellent education and outstanding student experience” (QAA ‘key findings’). This is key to a successful international strategy.

- 4.2 We must challenge perceptions and ensure that the reputation of Wales around the world is inclusive, representative, appealing, diverse, wide ranging and modern. We must also ensure that any post-Brexit immigration system continues to support the efforts of universities in attracting talented people who have a legitimate interest in studying, teaching or carrying out research in Wales.
- 4.3 Through the Study in Wales Brand, and the Global Wales programme, Wales is already making a mark internationally, and delivering on raising Wales' profile internationally, bringing investment and showcasing Wales as globally responsible nation. The Study in Wales messaging promotes Wales as part of the UK's world class higher education system and offers a distinct experience with a diverse range of universities, and a supportive and highly rated student experience. Wales offers an affordable and more cost-effective standard of living that enables students to experience a more varied lifestyle and become immersed in the culture of our country.
- 4.4 Global Wales has begun to incorporate "study" into the Welsh Government Cymru Wales brand portfolio of key sectors alongside tourism, food and drink and trade and invest. This will help increase both the scale and reach of the Study in Wales brand internationally, both to its key markets and beyond, and provide a cohesive and co-ordinated international approach across all included sectors. We would welcome this strategy to support new opportunities to take a cross-sector approach in identifying gains and amplify impact in areas of mutual attraction.
- 4.5 A thorough market research exercise should be carried out by the Welsh Government to identify its priority markets overseas. This should include extensive consultation with key international players both within Wales and beyond - including the higher education sector as a major export industry. WG should ensure sufficient resources to enable effective engagement both within the EU and in key priority markets beyond the EU. Any less would be detrimental to our reputation globally and would damage the Welsh economy.
- 4.6 In considering how we target international markets in future, clear, consistent and confident messaging about Wales and its offer will be crucial. It would seem appropriate to have an overarching key message set, tailored to each priority market.
- 4.7 Building on Global Wales' positive experience of working with the WG office in Washington DC, we would appreciate the opportunity to forge closer working relationships with all WG overseas offices. It would also be very helpful for those offices to have a clear steer to support the education sector. Recognition of education as a Trade and Investment is fundamental as, in the past, lack of clarity regarding education's place within the international agenda (and the fact that it's not understood as an export in itself) has been a barrier to collaboration with some officials.
- 4.8 It is also important to ensure that relevant organisations from UK Government to EU Institutions, British Council and World Bank, are clearly sighted and briefed on Wales International agenda so that additional opportunities can be leveraged and in turn, encourage and give confidence to international partners of the commitment to the international agenda.

- 4.9 Given the role of higher education in supporting Welsh Government’s initiative Cymraeg 2050: A million Welsh speakers, Welsh universities play a vital role in sustaining and supporting Welsh cultural life and also the Welsh language, both dimensions play an important role in presenting Wales to the world.
- 4.10 In terms of Wales- Africa relations, Universities Wales welcomes the Wales and Africa approach in achieving the UN’s Sustainable Development Goals. In addition to the civil-society based approach, it might be useful to consider how the Welsh Government could support through scholarships or mobility funding the opportunity for exchange or research collaborations between staff and students from Welsh universities and African universities. It might be useful to explore opportunities to partner with existing scholarship or research funders to ensure maximum impact. For example, Cardiff University has a long-lasting, mutually beneficial partnership with the University of Namibia.³⁸
- 4.11 Through curriculum development, teacher training and their support for lifelong learning, universities play a crucial role in the education ecosystem and their role in economic and social development was recognised by the inclusion of higher education in the UN’s Sustainable Development Goals, SDG4: Quality Education. However, universities contribution to the SDGs goes beyond SDG4 with higher education underpinning all 17 of the goals. The importance of higher education in achieving the Goals is increasingly being recognised³⁹ and in parallel, universities are recognising the integral role of sustainability to successful, long term strategies. Research excellence within UK universities is well known and its contribution to global challenges is increasingly well understood. Similarly, Welsh universities carry out research into a wide range of areas including bilingualism, policing, flooding, dementia, childcare, mental health, public housing, renewable energy, community violence, poverty, transport management, cancer and agriculture. This clearly shows that research and innovation activity by the sector makes an extensive and wide-ranging contribution to each of the seven well-being goals of the Well-being of Future Generations Act⁴⁰.
- 4.12 We have highlighted the strength of the HE sector in Wales and its international dimension. For our universities to continue to drive the economy and take advantage of future global opportunities, which as we have demonstrably shown will contribute to wider success for Wales’ international profile, it is crucial that education is fully embedded in the strategy as a key partner.

Responses to consultations are likely to be made public, on the internet or in a report. If you would prefer your response to remain anonymous, please tick here:

³⁸ <https://www.cardiff.ac.uk/international/international-partnerships/university-of-namibia>

³⁹ <https://www.universityworldnews.com/post.php?story=20181106131352348>

⁴⁰ A prosperous Wales; resilient Wales; healthier Wales; more equal Wales; a Wales of cohesive communities; a Wales of vibrant culture and Welsh language; a globally responsible Wales’