

# Agenda – Economy, Infrastructure and Skills Committee

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Meeting Venue:

**Committee Room 1 – Senedd**

Meeting date: 11 October 2017

Meeting time: 09.15

For further information contact:

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**Private pre-meeting (09.15–09.30)**

## 1 Introductions, apologies, substitutions and declarations of interest

## 2 Education panel – Selling Wales to the World

(09.30–10.30)

(Pages 1 – 27)

Iestyn Davies, Chief Executive Officer, Colleges Wales

Jenny Scott, Director Wales, British Council

Dr Christopher Lewis, Head of Education, British Council Wales

Attached Documents:

Research brief

EIS(5)–22–17(p1) Colleges Wales

EIS(5)–22–17(p2) British Council

**Break (10.30–10.45)**



Cynulliad  
Cenedlaethol  
Cymru

National  
Assembly for  
Wales

### **3 Universities Wales – Selling Wales to the World**

(10.45–11.45)

(Pages 28 – 33)

Professor Iwan Davies, Pro–Vice–Chancellor (Internationalisation and External Affairs), Swansea University

Angharad Thomas, Director of International Development, Bangor University

Amanda Wilkinson, Director, Universities Wales

Attached Documents:

EIS(5)–22–17(p3) Universities Wales

### **4 Paper(s) to note**

#### **4.1 Welsh Government response – Impacts of congestion on the bus industry in Wales**

(Pages 34 – 41)

Attached Documents:

EIS(5)–22–17(p4) Welsh Government response

### **5 Motion under Standing Order 17.42 to resolve to exclude the public from the remainder of the meeting**

### **6 Legislative Consent Memorandum: Telecommunications Infrastructure (Relief from Non–Domestic Rates) Bill**

(11.45–11.50)

(Pages 42 – 47)

Attached Documents:

EIS(5)–22–17(p5) Legislative Consent Memorandum

EIS(5)–22–17(p6) Legal advice note

**Private de–brief** (11.50–12.05)

# Agenda Item 2

Document is Restricted

## Introduction

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ColegauCymru welcomes the opportunity to respond to the National Assembly for Wales Economy Infrastructure & Skills Committee inquiry into “Selling Wales to the World”. ColegauCymru represents the 13<sup>1</sup> further education (FE) colleges and FE institutions in Wales<sup>2</sup> and promotes the public benefit of post compulsory education and learning.

Colleges are major providers of general education provision in Wales, helping to produce some of the best learner outcomes. Colleges are the predominant providers of funded vocational and technical education in Wales, providing about 85% of the total provision.

### How Welsh and UK Governments sell Wales to the World at present in terms of trade, tourism and skills/training

Further Education institutions could play a greater role in assisting the Welsh and UK Governments to promote Wales’ skills and training opportunities. FE institutions have grown increasingly attuned to the needs of businesses in recent years and look for flexible and innovative ways to support the training needs of businesses at all levels. Improved and more consistent interaction between relevant FE staff (for example business development, international and European officers) and officials from Welsh Government (WG) economy departments dealing with inward investment, including foreign direct investment, would be helpful. This would enable both sides to gain a better understanding of what each offers. It would also enable a more joined up approach to promoting the innovative support around skills that FEIs in Wales provide. The WG has recently formed an ‘International Group’ chaired by Des Clifford, Principal Secretary to the First Minister for Wales that includes British Council Wales, Universities Wales, and WG inward investment/trade reps. However, our understanding is that there is no sector-wide representation from Further Education or the wider work-based learning/skills sector. This is disappointing and needs to be addressed urgently. Whilst individual colleges and learning providers are more than capable of promoting themselves as individual institutions, clearer direction needs to be maintained to ensure that Wales itself, is seen as a destination for inward investment into people as well as to a place. These areas should not be an afterthought, but rather a core part of the offer from Wales.

ColegauCymru’s recent engagement with the Visit Wales Partnership Team, and planned future collaboration will hopefully see the skills agenda and college services better promoted to the tourist industry in Wales. In turn, this will support the development of a more highly and appropriately skilled nation.

<sup>1</sup> The 13 include 10 FE corporations and two FE institutions, St David’s Catholic College and Adult Learning Wales. The College Merthyr Tydfil, and Coleg Sir Gâr are part of university groupings.

<sup>2</sup> In this paper the terms ‘FE college’ and ‘college’ are used to cover FE colleges and FE institutions.

ColegauCymru has also developed a strong partnership with British Council Wales and, more widely, with British Council's UK skills team. As a result of the charity's strategic input, FE colleges in Wales have been successful in sourcing British Council's Skills for Employability funding to support capacity building and leadership development in vocational education and training (VET) in countries such as Vietnam, Thailand, South Africa and Tunisia. In addition, ColegauCymru supported British Council in bringing its biennial UK China People to People (P2P) event to Cardiff in 2015. The vocational roundtable that was part of the P2P was held at Cardiff and Vale College and attracted delegates from all over the UK who met with the senior level Chinese delegation.

ColegauCymru is a partner in a British Council Global Spotlight event in Cardiff in March 2018. The theme of the forthcoming event is apprenticeships and it provides an opportunity for the skills sector in Wales to showcase best practice in employer engagement and work-based learning. British Council will invite senior government officials from selected countries around the world to participate in the event, which will take place over three days at Cardiff and Vale College, and will also include visits to other colleges and employers.

ColegauCymru was a reciprocal partner in British Council's Going Global 2017, a conference for leaders in international education and has been invited to undertake the same role for Going Global 2018. ColegauCymru's Chief Executive also presented in a workshop in Going Global 2017.

In partnership with the British Council ColegauCymru in February/March 2017 led a delegation of FE leaders to Seattle, USA. During the visit, its staff and delegates from five colleges met with federal officials, business intermediary bodies as well as businesses within the aerospace and advanced manufacturing sectors and their training providers. ColegauCymru would welcome a closer working relationship with officials across Welsh Government in order to exploit the value of these relationships.

### **The role of the Welsh Government's overseas offices**

ColegauCymru has engaged with some of the Welsh Government's overseas offices in recent years and they have played a useful role in terms of facilitation and information sharing. The Washington DC and San Francisco office staff were very helpful in facilitating links for the IPLC (International Professional Learning Community) visit to Seattle, funded by British Council Wales referenced above.

The CEO and European & International Coordinator of ColegauCymru visited Brussels in March 2016 for St David's Day celebrations and met with staff from the WG office. Following the appointment of a new WG officer to the Brussels staff in 2016, there has been fairly regular email communication in relation to Erasmus+, VET skills week and the 2017 VET awards.

In addition, staff from the overseas office in the United Arab Emirates (UAE) met with ColegauCymru and some International Managers in January and October 2016 to discuss skills and educational needs in the Middle East North Africa (MENA) region.

Some contact with staff from the overseas office in India has taken place in the past three to four years in relation to developing UKIERI (UK India Education and Research Initiative) bids.

FE International Managers on overseas visits will sometimes make contact with Welsh Government offices in that region – a list of names and contact details would be useful for ColegauCymru to assist with linking people together. Receiving regular updates from Welsh Government overseas offices would also be useful to inform colleges about current activity or development plans. There may be opportunities for FE that are currently missed due to a lack of understanding of what FE can do.

In the last three to four years, overseas staff from Welsh Government have undertaken training in Wales – normally in April/May. ColegauCymru staff gave a presentation to a delegation around four years ago on Further Education alongside Higher Education representatives. Despite repeated requests to the Welsh Government's European and External Affairs Department office (EEAD) for overseas delegates to visit some FE colleges while in Wales to see first hand what is on offer, this has sadly, never taken place.

ColegauCymru, on behalf of the FE sector, employed a full time member of staff in the Welsh Government Chongqing office to be responsible for developing partnerships and commercial opportunities for the Wales China FE Consortium. The Consortium ran from 2011 – 2016. During this period there was a great deal of contact with the Chongqing office and also with the offices in Shanghai and Beijing. This has reduced since the consortium ended in 2016 but individual colleges continue to work with the Chinese offices on occasion.

### **Welsh and UK Government support for exporters, and inward investment**

Please refer to comments above with regard to how closer links between officials in the relevant Welsh Government departments and staff in FEIs could prove beneficial.

Colleges should be crucial Welsh Government partners in attracting inward investment to Wales and have played a key role in attracting large employers to Wales, e.g. Aston Martin; Hitachi; GE and Airbus. Leading on the local skills agenda to ensure the current and future talent pool is work-ready, FE colleges are committed to responding to industry needs. However, with the exception of occasional examples, there does not appear to be a coherent strategy for involving and engaging the Further Education sector consistently in discussions around inward investment in particular, with a seemingly piecemeal approach taken.

More widely, education can be considered a potential export but it is not clear that the Welsh Government always sees Further Education in this light. The situation is slightly different in relation to the UK Government who, by default, contact the Association of Colleges (AoC) with information on international opportunities for the UK skills sector. As the AoC's membership is largely based in England, it would be extremely useful for communication channels between UK Department for International Trade (formerly UKTI) and the Welsh Government to be improved to ensure that these opportunities are publicised and made available from the start to all countries in the UK. Improved links would also highlight to UK Government the support on offer from the FE sector in Wales for potential inward investors.

There is a need for greater clarity about the role and structure of the Welsh Government's European and External Affairs Department, the inward investment/trade teams and overseas staff, and how they relate to each other. At present, it is not clear who does what, especially in light of negotiations around the UK's departure from the EU.

### **The knowledge of 'Wales.Com' web site and in particular the help given by Business Wales**

ColegauCymru would welcome the chance to improve the FE sector's webpages on Wales.com. It would be useful to know who is responsible for the content of this part of the website and to work together to produce something more cohesive and up to date with vocational images in addition to academic ones. The Study in Wales brand and the Global Wales partnership are both university-led initiatives that have received funding and support from Welsh Government and British Council Wales. The skills sector in Wales would benefit from similar support to develop its own brand and identity for international marketing. This is a conversation ColegauCymru has begun with British Council Wales.

### **The clarity and strength of Wales's international tourism "brand"**

FE colleges are committed to the outdoor industry and provide a sustainable supply of skilled individuals to support economic growth and success in this space. Colleges ensure that qualifications are internationally recognised (EQF, European Qualifications Framework) allowing for international transferability and learner opportunities. Building on the available skilled workforce can support the clarity of the tourism 'brand'.

## How Colleges/Universities promote international studying in Wales

FE institutions in Wales promote international studying in Wales in a variety of ways. This includes activities such as summer and winter schools (mainly for Chinese students) combining English language learning, taster A level or vocational classes as well as cultural and social visits in Wales. The aim is to recruit students to study either A level or vocational courses in Wales. Some colleges have also established strong partnerships with schools/colleges overseas for A level delivery, capacity building in VET education and leadership training for VET staff and principals. For further details, see Annex 1 at the end of this paper. The Erasmus+ programme is particularly valuable: FE colleges in Wales have developed strong partnerships with vocational colleges across Europe through Erasmus+. The colleges in Europe source work placements for learners from Wales. FE colleges in Wales then offer reciprocal opportunities for learners from across Europe to undertake work placements in Wales or training periods in salons and workshops within the colleges in Wales. This helps build staff, student and institutional relationships. Many students have been offered employment in the businesses who have hosted their work placements, demonstrating the value of skills developed at FEIs in Wales.

## The use made of support from the EU and the impact of Brexit

ColegauCymru and FEIs across Wales have benefitted greatly from European funding generally – see separate ColegauCymru report on *Involvement of Welsh Further Education colleges and institutions in EU funding* (forthcoming). In terms of specific initiatives, as noted above, the impact of the Erasmus+ programme is invaluable in terms of two-way exchange of knowledge and skills between Wales FEIs and students and the partnership countries.

ColegauCymru has also developed Erasmus+ pan Wales staff mobility projects. These projects provide continuous professional development opportunities for senior leaders, middle leaders and tutors to explore best practice in different European countries. Themes that have been explored on these projects include embedding literacy & numeracy in VET (Finland), innovation in VET (Basque Country, Spain) and bilingualism (Catalonia, Spain). A 2018 project will explore building capacity to deliver higher level skills in Denmark.

The future of the highly successful Erasmus+ programme is put at risk by the UK's departure from the EU and every step must be taken to ensure that this programme or an equivalent for Wales is maintained post-exit in March 2019. Many discussions around the future of Erasmus+ have focussed on its Higher Education elements but the vocational Further Education opportunities are invaluable and should not be marginalised.

Other European initiatives around vocational education and training have also had a positive impact for Wales with ColegauCymru staff playing key roles in European



networks such as the European Quality Assurance in Vocational Education and Training (EQAVET) Network. In every country (European Union, European Economic Area and candidate countries), a Quality Assurance National Reference Point (NRP) brings together existing relevant bodies and involves the social partners and all relevant stakeholders at national and regional levels, in order to ensure the follow-up of initiatives. ColegauCymru acts as the NRP on behalf of the Welsh Government and has been successful in securing research funding of over £100,000 since 2015 for projects ranging from skills needs and offers in Wales' retail, tourism and hospitality industry to the role of skills in promoting economic resilience in comparable regions of Europe. Acting on behalf of the NRP, ColegauCymru experts have provided updates on developments in Wales and showcased examples of good practice e.g. Youth Engagement and Progression Framework across the EQAVET network. They have presented at annual network and Forum meetings to pan-European audiences, been involved in all Working Groups and provided Welsh case studies which have been published in the final reports.

ColegauCymru, in collaboration with UK EQF National Contact Points, has developed a website designed to help careers advisers, recruiters, university and college staff, learners and workers understand how skills and qualifications are recognised across Europe. The website is available in English and Welsh and can be accessed through via [www.skillsforeurope.uk](http://www.skillsforeurope.uk) and [www.sgiliauiewrop.cymru](http://www.sgiliauiewrop.cymru).

In September 2016 ColegauCymru hosted an EQAVET Peer Learning Activity on Placement data in vocational education programmes which was attended by delegates from across Europe. The event was very successful and both Cardiff and Vale College, as the venue, and Wales, as the host country, received positive feedback. Through our involvement in the EQAVET programme we have received invitations to take part in other projects and conferences which has significantly helped to raise awareness of Wales in the wider European community.

The European Qualifications Framework (EQF) is an international benchmark, possibly the leading regional framework, in terms of use and reputation. From an international perspective, through the EQF's structures and processes, the qualifications system in the UK is more understandable and more accessible to people from overseas (including those outside Europe). Similarly, people in Wales can now compare Welsh levels of qualifications and Welsh qualifications types to those of other European countries. ColegauCymru's role as the National Contact Point (NCP) for the EQF ensures that Wales' voice continues to be heard at EQF Coordination group meetings in the UK and in Brussels. Many countries outside Europe wish to officially reference their National Qualifications Frameworks (NQFs) to the EQF (for example, Australia, New Zealand, Hong Kong (SAR), India, United Arab Emirates). There is also interest from owners of international sectoral qualifications in having qualifications referenced to an EQF level. Even when the UK leaves the EU, there is still a case for maintaining a link to the EQF along with other "third countries"

Likewise, Cedefop ([www.cedefop.europa.eu/en](http://www.cedefop.europa.eu/en)) works to strengthen European cooperation and provide the evidence on which to base European VET policy. Cedefop's added value is the high quality of its comparative analyses and expertise gathered through research and networking. Representatives from Wales have taken an active role in Cedefop, participating in a Policy Learning Forum (PLF) on Vocational training for the long-term unemployed in June 2017, for example. Information gained around approaches to addressing these issues, highly relevant in Wales, is extremely valuable and will be fed back to Welsh Government. ColegauCymru also draws on this information to inform responses to consultations and develop policy proposals. Links to partner countries are also further developed via events such as these. Following the June PLF, the potential of a visit to explore how Ireland has dealt with the issue of governance, planning and delivery of post-compulsory education is being explored, with a view to engaging Alun Davies AM, Minister for Lifelong Learning and Welsh Language. This would provide valuable insight as the Welsh Government seeks to implement the recommendations of the Hazelkorn Review.

As the UK prepares to leave the EU, future participation in networks including Cedefop and EQAVET is a subject of debate. Wales has benefitted from participation in these pan-European initiatives, with the ability to learn from and showcase best practice. An initiative's value is partly determined by a country's willingness to engage and make it successful. If other countries have chosen not to engage greatly with European networks, they may well consider them to be of less value or insignificant. However, this is not objectively the case and ColegauCymru strongly advocates that Wales should continue to participate in European vocational and education networks to the same level as present, even if other nations of the UK do not choose to take advantage of the opportunities offered.

### **What lessons Wales can learn from similarly sized countries?**

In terms of potential lessons from similarly-sized countries on skills and training, Cedefop produces a range of publications and resources, many on a country-specific basis which allow comparisons between the UK (including much Wales-level detail) and European countries of all sizes. Recent topics have included 'Apprenticeship-type schemes and structured work-based learning programmes', 'Skills forecasts' and 'Innovation in VET'.<sup>3</sup>

International benchmarking is a key Welsh Government priority for FE. As a result of our six years of Erasmus+ engagement we have excellent links with other European countries. As a bilingual country, there is much that Wales can learn from our multilingual European counterparts. In July 2017, ColegauCymru facilitated a Ministerial visit to the Basque Country to engage in learning lessons on innovation

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<sup>3</sup> See [www.cedefop.europa.eu/en/publications-and-resources/country-reports](http://www.cedefop.europa.eu/en/publications-and-resources/country-reports) [accessed 22-8-17].

and language development in VET (Vocational Education & Training) from a country similar to ours.

Catalonia is also similar to Wales in many respects and we have developed strong business and skills partnerships and multilingual policy development links with them as a result. ColegauCymru also maintains close working relationships with the relevant vocational groups in the Basque Country and continues to deepen and develop its networks with regions across Europe. The relationships could potentially be exploited to benefit business and the wider community if they were included in a strategic approach which encompassed FEIs.

Learning from others is crucial to sustaining success and growing our potential.

## **Conclusion**

Further Education Institutions and ColegauCymru have much more to offer in terms of helping to promote Wales, whether that is in terms of support for skills, training and development around inward investment; ensuring the ongoing portability and understanding of qualifications from Wales in comparison with those of other countries; or building on our existing links with other countries, both in Europe and further afield.

To this end, the Welsh Government should:

- Ensure that Further Education is consistently included as a key partner in discussions on inward investment and other relevant economic developments and strategies.
- In partnership with ColegauCymru, maintain the current level of engagement and involvement with European agencies and partners around vocational education and training, benchmarks including EQF, and full participation in Erasmus+ programme.
- Commit to supporting and maintaining the relationships built between vocational education institutions and training providers as it progresses towards the establishment of the Tertiary Education and Research Commission.
- Improve communication and links between key partners/stakeholders to enable involvement and commitment to improving skills and prosperity to support the social, economic, environmental and cultural well-being of Wales. (The Future Generations (Wales) Act 2015).

## **Dr Rachel Bowen**

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## How FE colleges promote international studying in Wales

### Dedicated international pages on college websites

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International pages on FE college websites advertise courses that can be accessed by international students. These include A levels, NVQs, foundation degrees, HNCs, HNDs, English language courses and, in some cases, degree courses. Prospective applicants can apply online through college websites for courses or make contact with the college for more information. Links to the individual colleges' website pages are included in the Further Information section below.

### Student World Online and other similar websites

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Some colleges advertise on commercial websites that target international students and, for a fee, undertake some of the 'sifting' of potential students. These websites advertise worldwide study and are dominated by the HE sector. Here is a link to a dedicated page on Student World Online focussing on the FE colleges in Wales -

<http://www.studentworldonline.com/article/colleges-in-wales-flexible-lower-cost-study-for-/254/>

### Overseas agents

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FE colleges develop partnerships with overseas agents to recruit international students in their targeted countries. Agents charge a percentage commission for their services and may work for a number of educational organisations including universities so colleges have to work hard to build trusting relationships with agents. International Managers from the colleges will also visit schools overseas with their agents to have direct contact with international students.

### Student recruitment fairs overseas

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International Managers from the FE colleges may attend recruitment fairs overseas. Most of these are organised by British Council. They tend to be quite expensive so International Managers will also plan to visit schools/colleges with their agents on the same visit to make the visit worthwhile.

### Partnerships with schools/colleges overseas

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Some colleges have established strong partnerships with schools/colleges overseas for A level delivery, capacity building in VET education and leadership training for VET staff and principals. For example, Welsh college staff train staff from the target country to deliver AS levels for one-year in country and then the learners transfer to the college in Wales to complete A2s and progress to UK universities. For capacity building and leadership training,

delegations are sometimes trained overseas or they may visit Wales to undertake longer periods of training and observations.

### **Promoting a specialism**

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FE colleges with a USP such as Cardiff and Vale College's (CAVC) International Centre for Aerospace Training (ICAT) offer internationally recognised courses that can be undertaken in Cardiff and they offer online courses too.

### **Partnerships with universities in Wales**

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Some FE colleges have developed partnerships with universities in Wales and are able to offer progression routes to international students who are initially recruited to study A levels.

### **Summer and Winter schools in Wales**

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Some FE colleges have developed a programme of summer and winter schools (mainly for Chinese students). These schools combine English language learning, taster A level or vocational classes as well as cultural and social visits in Wales. The aim is to recruit students to study either A level or vocational courses in Wales.

### **Erasmus+**

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FE colleges in Wales have developed strong partnerships with vocational colleges across Europe through Erasmus+. The colleges in Europe source work placements for learners from Wales. FE colleges in Wales then offer reciprocal opportunities for learners from across Europe to undertake work placements in Wales or training periods in salons and workshops within the colleges in Wales.

## Further Information

College	International pages on college website	Highly Trusted Sponsor
Bridgend College	n/a	NO
Cardiff and Vale College	<a href="http://www.cavc.ac.uk/en/international/introduction/">http://www.cavc.ac.uk/en/international/introduction/</a>	YES
Coleg Cambria	<a href="https://www.cambria.ac.uk/cambria-info/international/">https://www.cambria.ac.uk/cambria-info/international/</a>	YES
Coleg Sir Gâr	Recruits learners from Southern Ireland – has hosted UAE learners in the past.	YES
Coleg y Cymoedd	<a href="http://www.cymoedd.ac.uk/international/international-home.aspx?lang=en">http://www.cymoedd.ac.uk/international/international-home.aspx?lang=en</a>	YES
Coleg Gwent	<a href="http://www.coleggwent.ac.uk/international#submenu">http://www.coleggwent.ac.uk/international#submenu</a>	YES
Gower College Swansea	<a href="http://www.gcs.ac.uk/international">http://www.gcs.ac.uk/international</a>	YES
Grwp Llandrillo Menai	<a href="http://www.gllminternational.com/">http://www.gllminternational.com/</a>	YES
NPTC Group	<a href="https://www.nptcgroup.ac.uk/international/">https://www.nptcgroup.ac.uk/international/</a>	YES
Pembrokeshire College	<a href="http://www.pembrokeshire.ac.uk/international-home/">http://www.pembrokeshire.ac.uk/international-home/</a>	YES
St David's Catholic College	<a href="https://www.stdavidscollege.ac.uk/international/">https://www.stdavidscollege.ac.uk/international/</a>	YES
The College Merthyr Tydfil	n/a	NO
Adult Learning Wales	n/a	NO

Ten out of the thirteen Further Education Institutes (FEIs) in Wales promote international studying in Wales and recruit international students.

In order for FE colleges to recruit internationally, the Home Office must approve them as Highly Trusted Sponsors and the colleges must comply with UK Visa and Immigration regulations.

## Response to Economy, Infrastructure and Skills Committee Inquiry, 'Selling Wales to the World' by the British Council

### Summary

1. Wales needs an **integrated international strategy** - a single vision for shaping our global future that aligns established tourism, trade and inward investment approaches with work being done to take forward the international ambitions of our educational and cultural sectors.

1.1. Education and the arts help build a stock of international trust and goodwill towards Wales and are the foundation of our soft power capital.

1.2 Our higher education (HE) and vocational education and training (VET) sectors are deeply connected internationally. Research collaborations and strategic partnerships link our universities to leading global institutions. International students make a significant contribution to Welsh life and build lasting economic and cultural connections between Wales and the world.

1.3 Our artists and arts companies are Wales' international 'calling card'<sup>1</sup>. Whether it's Welsh National Opera leading a year of creative collaboration in Dubai<sup>2</sup>, or the vibrant artistic conversations supported through the India-Wales programme<sup>3</sup> – the arts help form an international view of Wales as a creative and outward-looking, modern nation.

1.4 Wales must do more to ensure that these significant soft power assets are recognised, nurtured and strategically deployed.

2. Wales' global future will also require the next generation of our young people to have the **internationalist outlook and intercultural skills** needed in a globalised world.

2.1 Work to embed the 'international perspective' across the new school curriculum in Wales (in line with the recommendations in *Successful Futures*<sup>4</sup>) is underway and will enhance current good practice in Welsh schools.

2.2 Welsh Government support for the Erasmus+ international mobility programme is welcome, particularly in the context of Brexit. It is now more important than ever that young people in Wales retain access to funded opportunities to live, study and work overseas.

2.3 An urgent policy review is needed to arrest the alarming decline in the learning of modern foreign languages (MFL) in Welsh schools.

### About the British Council

3. The British Council is the UK's international organisation for cultural relations and educational opportunities. We create friendly knowledge and understanding between the people of the UK and other countries.

4. We have been promoting the best of Welsh culture and education internationally, through our programmes in education and the arts, since the 1940s. We help Welsh students, teachers, artists, researchers and institutions connect with their counterparts around the world<sup>5</sup>.

### Soft power and Wales' global future

5. Soft power can be thought of as a stock of goodwill and trust towards a country and its people, traditionally seen as arising from attraction towards its culture and values<sup>6</sup>.



6. We know that people overseas who have interacted with the UK through its 'cultural space' – the arts, education, science and sport – have greater trust in people from the UK and tend to have increased interest in studying here, doing business with the UK and visiting as a tourist<sup>7</sup>. Recent research by the University of California and the Centre for Economic and Policy Research has shown a clear link between increases in soft power and the value of exports<sup>8</sup>.

7. Small nations can benefit disproportionately from their soft power capital. Denmark - a small global player in terms of military strength and political and economic influence - is 11<sup>th</sup> in the global Soft Power Index, which ranks countries by the impact of their culture, diplomacy, education, governance and innovation<sup>9</sup>. This is not just due to the 'power of attraction' of popular Danish TV series or Nordic noir literature. The 'power of example' is also encouraging cities and countries around the world to copy Denmark's bicycle-friendly infrastructure, draw lessons from its socio-political model and seek to replicate its approach to cohesive and transparent governance.

8. As a small nation with its own significant educational, cultural, sporting and governance assets, Wales should take a close look at how other small nations recognise, nurture and strategically deploy their soft power capital.

9. With many of the international networks Wales currently has through the UK's membership of the European Union (EU) now uncertain, the need to establish and renew international connections is more important than ever. Some commentators have called on the UK to 'seize the soft power moment' of Brexit<sup>10</sup>. Now is the time for Wales to get serious about soft power.

### **Wales' soft power capital: HE and VET**

10. Wales' HE and VET institutions are key drivers of our economic prosperity and international engagement.

10.1. International students at our universities and colleges (more than 25,000 from 145 countries in 2013-14) make a significant contribution to Welsh life, creating more than 7,600 jobs and enriching our campuses and wider communities.

10.2. International alumni also create long-term cultural and economic links between Wales and the world, taking part in millions of positive conversations about Wales, its people, businesses and institutions. Such alumni and their networks are the future inward investors, trading partners, tourists and research collaborators Wales needs.

10.3. However, more needs to be done to co-ordinate efforts to harness the soft power potential and untapped economic value of our international alumni with tourism, trade and inward investment activity.

11. The research carried out at Welsh universities is highly regarded internationally and recognised as some of the most impactful in 2014's Research Excellence Framework<sup>11</sup>. Our universities collaborate with counterparts across the world and have established strategic partnerships with some of the world's leading institutions.

12. Individual universities pursue their own international strategies, priority markets and modes of engagement. However, the whole of the HE sector also benefits from some important all-Wales initiatives.

12.1 The Global Wales programme is a partnership between the British Council, Universities Wales, Welsh Government and the Higher Education Funding Council for Wales, with the support of all nine Welsh universities. The three year programme aims to promote the Welsh sector initially in two key priority markets – the USA and Vietnam – through inward visits and



outward missions by senior government officials, university leaders and academics. It is based on the successful Connected Scotland initiative<sup>12</sup>.

12.2 Global Wales incorporates a new Study in Wales brand, which is promoting Welsh universities at major international conferences and expos and through digital marketing. Wales.com has supported this work.

12.3 With partners and funding from across Welsh Government departments – including Trade and Invest, Visit Wales and the Office of the First Minister – Global Wales is modelling an integrated approach to selling Wales to the world that could be expanded.

13. At an institutional level, the VET sector has many international links, exchange arrangements and commercial partnerships - including those established through the British Council's International Skills Partnerships programme.

14. The British Council also supports the international ambitions of the sector as a whole.

14.1 We have supported two international visits by college leaders as part of our Welsh Government-funded International Professional Learning Communities programme.

14.2 We are also showcasing the best of Welsh VET through our Going Global international education conference and Global Skills Spotlight series. 25 senior international delegates will visit Wales in March 2018 as part of our spotlight on Welsh apprenticeships.

14.3 The VET sector in Wales has been very successful in accessing Erasmus+ funding for staff and student mobility and strategic partnerships.

15. However, it is not clear that the VET sector in Wales has the same opportunity to co-ordinate its international planning and activity with government-led tourism, trade and inward investment activity as its HE counterparts. There is no Global Wales-equivalent for the sector.

### **Wales' soft power capital: the arts**

16. Wales has world-class individual artists and companies who are taking the best of contemporary Welsh culture around the world. The following selected examples demonstrate the scope of Wales' international artistic ambitions and how the sector is supporting Wales' broader international aims.

16.1 The *India Wales* programme, a joint initiative between the Arts Council of Wales / Wales Arts International and the British Council, has used the UK/India 2017 year of culture to create a rich portfolio of collaborative projects involving leading Welsh and Indian artists<sup>13</sup>. Welsh Government Cabinet Secretary for Economy and Infrastructure Ken Skates has acknowledged the important role such artistic collaborations can play in building Wales' long term relationship with an emerging global power:

*Wales has strong and long standing relations with India. The UK/India 2017 year of culture offers an important opportunity for Wales and India to refresh and strengthen these links, and also to create new dynamic connections and creative collaborations*

16.2 British Council Wales and Arts Council Wales / Wales Arts International have supported Welsh performing arts companies to present their work at the Edinburgh Festival Fringe, the single biggest opportunity for UK theatre companies to introduce their work to international promoters. Similarly, we have supported musicians at Celtic Connections in Glasgow, one of the largest Celtic music festivals, as well as Welsh writers at the London Book Fair.

17. Unlike many small countries and regions, Wales does not benefit from hosting its own annual or biennial international culture platform. As such, our view is that an opportunity to showcase the best of Welsh culture and attract large numbers of international promoters, tourists and policy-makers to Wales is being missed.

18. There is a lot to be learned about the potential benefits of establishing a high profile international conference, expo or festival in Wales from decades of investment that has taken place in Scotland.

18.1 Edinburgh's festivals are a powerful international cultural brand for Scotland and the UK. Forging international partnerships gives Scotland a voice on the world stage and its cultural reputation supports its global positioning. The festivals are a major international tourism attractor with approximately 500,000 overnight visitors from outside Scotland each year<sup>14</sup>. In 2011, it was estimated that the festivals generated £261m of additional expenditure in the Scottish economy, a substantial return on £9m of public investment (in 2014/15).

18.2 The Edinburgh International Culture Summit – a biennial event - brings together culture ministers, artists, thinkers and arts leaders from around the world to share ideas, expertise and best practice, with a view to inspiring positive change in cultural policy and investment. Over 40 countries were represented at the 2016 summit.

19. While the festival market is becoming more competitive, we suggest that research is commissioned to identify different models that might support the development of an annual or biennial international showcasing event in Wales. Our view is that a recurring festival or expo is more likely to achieve sustainable returns on investment than one-off events.

### **Promoting internationalism at home**

20. In order to sell itself to the world effectively, Wales must develop a generation of young people with the internationalist outlook and intercultural skills needed in a globalised world. This need is all the more pressing in the context of Brexit, which creates a new imperative for Wales to reach out to the rest of the world.

21. International thinking and global citizenship are already supported in Welsh schools through the International Education Programme (IEP). Funded by Welsh Government and delivered by the British Council, the IEP: provides individuals with the knowledge and skills necessary to contribute in a global community; increases awareness of and changes attitudes to global learning; and encourages sustained collaboration between Wales and other countries<sup>15</sup>.

22. Internationalism in schools will be further strengthened by the implementation of the recommendation by Professor Graham Donaldson, following his review of the curriculum in Wales that the 'international perspective' is embedded across all six of the proposed areas of learning.

23. Wales has engaged strongly with the EU's Erasmus+ programme in recent years, with more than 2,500 individuals taking the opportunity to live, work or study overseas in 2016 and attracting more than €8m of funding in each of the last two years. The long term status of Erasmus+ in the UK is uncertain following Brexit and we welcome the Welsh Government's strong support for the programme. The British Council, with Ecorys UK, is the National Agency for Erasmus+ in the UK.

24. The British Council has documented the alarming decline in the proportion of children studying MFLs to GCSE level in Wales in the last decade or so in our Language Trends Wales series<sup>16</sup>. The Welsh Government has introduced the five year Global Futures plan to promote language learning and the British Council is supporting that initiative<sup>17</sup>. However, it is important that an urgent policy review is undertaken to remove systemic barriers to MFL in secondary

schools and further investment is required in the primary sector to help the Welsh Government realise the policy ambition of ‘bilingual + 1’ from Year 5.

25. Wales needs young people with the intercultural and linguistic skills to do business with and positively influence the rest of the world. The continued decline of MFL in our schools will harm Wales’ ability to do that in the long term.

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<sup>1</sup> Welsh Government (2016) *Light Springs through the Dark: A Vision for Culture in Wales*.

<http://gov.wales/about/cabinet/cabinetstatements/2016-new/culture/?lang=en>

<sup>2</sup> UK/UAE 2017 Year of Creative Collaboration <https://www.britishcouncil.ae/en/uk-uae-2017>

<sup>3</sup> India-Wales <https://wales.britishcouncil.org/en/arts/india-wales-building-relationships-through-art>

<sup>4</sup> Professor Graham Donaldson CB (2015), Successful Futures Independent Review of Curriculum and Assessment Arrangements in Wales. <http://gov.wales/docs/dcells/publications/150225-successful-futures-en.pdf>

<sup>5</sup> British Council Wales <https://wales.britishcouncil.org/en>

<sup>6</sup> Phillip Blond, James Noyes and Duncan Sim (2017) Britain's Global Future: *Harnessing the soft power capital of UK institutions* <http://www.respublica.org.uk/wp-content/uploads/2017/07/Soft-Power-3.pdf>

<sup>7</sup> Trust Pays: How international cultural relationships build trust in the UK and underpin the success of the UK economy (2012) <https://www.britishcouncil.org/organisation/policy-insight-research/research/trust-pays>

<sup>8</sup> The research showed that an increase of 1% in soft power was linked to an increase of 0.8% in the value of exports. Rose, Andrew K (2016) Like Me, Buy Me: The Effect of Soft Power on Exports (July 2016). *Economics & Politics*, Vol.28, Issue 2, pp. 216-232. Available at SSRN: <http://ssrn.com/abstract=2796366> or <http://dx.doi.org/10.1111/ecpo.12077>

<sup>9</sup> Soft Power Index <https://softpower30.com/country/denmark/>

<sup>10</sup> Phillip Blond, James Noyes and Duncan Sim (2017) Britain's Global Future: *Harnessing the soft power capital of UK institutions* <http://www.respublica.org.uk/wp-content/uploads/2017/07/Soft-Power-3.pdf>

<sup>11</sup> Research Excellence Framework (REF) 2014 <http://www.ref.ac.uk/>

<sup>12</sup> Connected Scotland <http://connectedscotland.org/>

<sup>13</sup> India-Wales <https://wales.britishcouncil.org/en/arts/india-wales-building-relationships-through-art>

<sup>14</sup> Edinburgh Festival <http://www.edinburghfestivalcity.com/about/documents/196-thundering-hooves>

<sup>15</sup> International Education Programme <https://wales.britishcouncil.org/en/programmes/education/international-education-programme>

<sup>16</sup> Language Trends Wales 2016/2017 <https://wales.britishcouncil.org/en/language-trends-wales>

<sup>17</sup> Welsh Government (2015) Global Futures. A plan to improve and promote modern foreign languages in Wales 2015–2020 <http://gov.wales/docs/dcells/publications/151019-global-futures-en.pdf>

# Agenda Item 3

## About Universities Wales, Global Wales and Study in Wales

1. As a National **Council of Universities UK (UUK)**, Universities Wales represents the **interests of universities in Wales**. Our Governing Council consists of the Vice-Chancellors **of Wales' universities** and the Director of the Open University (OU) in Wales. **Global Wales** is a partnership, in its third year, between us, British Council, Welsh Government and HEFCW. It promotes universities in key overseas markets with a view to building new collaborative ventures, increasing Wales' visibility overseas and attracting further investment. **Study in Wales**, led by us as part of Global Wales, is the branded promotion of Welsh universities and Wales as a study destination for students.
2. We work with British Council to capitalise on opportunities to promote Wales, facilitate inward visits and promote international partnerships. We work with Welsh Government to promote studying in Wales, develop outward missions and other economic development opportunities, and work through the implications of Brexit. **UUK's International Unit (UUKi)** in our parent organisation provides support and in-depth expertise, from country briefings to immigration updates. HEFCW supports the promotion of Welsh higher education's (HE) reputation, and adds value to initiatives such as Study in Wales (eg by providing data).
3. Universities Wales, the universities and HEFCW support the **Welsh Higher Education Brussels (WHEB)** office, co-located in Wales House with Welsh Government and the WLGA. The office supports greater engagement of universities and academics in EU policies and programmes, and is a member of a network of regions with representation in Brussels.

## Current activities to sell Wales to the world

4. Global Wales aims to: boost student recruitment and research collaboration through joint outward missions, inward visits and promotional activities; and enhance Wales' reputation as a study destination through Study in Wales. Our approach works best by focusing on what is distinctive about Wales, and on markets and activities where an impact can be made more effectively as 'Wales'. Our priority markets are the USA and Vietnam, although we do pursue collectively key activities in other areas such as India, China, the Middle East and the EU.
5. Study in Wales, representing all nine universities, is used: on brochures and postcards; on our website; on social media (Twitter and Facebook, the latter with 72,500 Likes); on stands at large international HE events in the USA and Europe, and associated international receptions. Study in Wales had access to 9,000 delegates at the National Association of International Educators (NAFSA) conference in the USA in May 2017. We are keen to work with Welsh Government on fitting in Study in Wales with its nation-branding proposals, for the benefit of our universities, HE, our economy and our reputation.

## The role of the Welsh Government's overseas offices

6. We have worked with colleagues in Welsh Government offices in the USA on government and HE events. Offices in India and the Middle East have supported us to: increase publicity for studying in Wales; enable inward or outward visits; and establish relationships between universities and potential overseas partners. Crucially, these opportunities are spotted in-country before the connection is made with us.
7. These Government offices will be vital in identifying opportunities post-Brexit, and should be linked with **universities'** overseas offices (for example in China and India). Already well-versed

in making strategic and alumni links, and in recruitment, marketing and business development, these offices can promote Wales-related content and support overseas contracts. Welsh Government overseas offices can also build on relationships with university country specialists and pool information, where appropriate and not commercially-sensitive.

8. WHEB has worked on initiatives with Welsh Government's EU office. The office is committed to supporting the European dimension of the Science for Wales Strategy by focusing on priority areas for research, and has provided a service to the Sêr Cymru and National Research Networks initiatives. Serving distinct constituencies, the volume of activities based on co-operation between the Wales House offices is limited.

### Universities, internationalisation and economic contribution

9. Our universities: deliver highly-skilled graduates who contribute to the Welsh economy; produce excellent research that impacts on the lives of citizens; attract international recognition; drive inclusive economic growth locally, regionally and nationally; and promote equality and health. 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. Students and their families and friends impact on tourism and trade.

10. Our universities are internationally competitive and major economic assets, bringing widespread benefits to individuals, communities and the nation. The total combined impact of Welsh universities and their students on Wales' GVA came to nearly **£2.4 billion - 4.6% of all Wales GVA** - in 2013. Welsh universities bring in



**£413 million of export earnings** - £218 million international revenue and £195 million in the off-campus expenditure of international students. £89 million of GVA was generated (nearly 22% of the total) and 1,756 jobs created (nearly 23% of the total) by Welsh universities in parts of Wales that do not have a university on their doorstep.

11. International students make an enormous academic, cultural and economic contribution to Wales, creating more than 7,600 jobs. Of our 25,605 international students from 145 countries in 2013/14, 5,424 were EU students (4% of the student population). EU students generated £150.3 million for our economy and over 1,400 FTE jobs across the country in 2014/15. The off-campus personal expenditure of students and visitors is equivalent to more than 7% of the spending of all visitors to Wales.
12. Welsh Government's stance on immigration is broadly in line with that of UUK and Universities Wales. In November 2016, the First Minister underlined the welcome for overseas students in Wales, noting that the previous UK Government was "mistaken" in its approach to student visas: 'The effect is to cut the numbers of overseas students applying to study in the UK. Not just because of new restrictive laws, but because of the damaging perception that this is not a welcoming environment any longer.' We remain concerned about the perception of UK immigration policy on potential international student applications.
13. International students bring a significant, positive and immediate economic benefit, and create valuable and major long-term cultural and economic links between Wales and the world. Universities and international student recruitment have a huge role to play in Wales' future economic growth. We are eager that Welsh Government recognises and measures the export



income contribution of recruiting international students, and continues to work with the UK Government on an immigration policy that supports international student and staff recruitment.

14. Universities are involved in Wales and UK trade missions. Their expertise, and talented academics and graduates, are key in attracting inward investment – from creative industries to clinical research to new technologies. The university-industry links that impact on inward investment contribute to export growth, and attract specialist international conferences.

### Wales.Com

15. Study in Wales has a positive relationship with Wales.com, which has involved our universities in an annual campaign, and we look forward to further opportunities afforded by Welsh Government's Digital Gateway Project. Study in Wales would benefit from involvement in nation branding work, and both Welsh Government's portal and the consistency and reach of Study in Wales' messages will benefit from greater digital alignment. We look forward to greater linkages between Wales.com and, for example, tradeandinvest.com through one portal.

### International marketing and promotion

16. As research, innovation, public engagement, and excellent education and student experiences all contribute to the success and reputation of HE internationally, universities could play a more central role in the 'story of Wales' sold around the world.
17. Wales is the UK nation with the highest proportion of **'world leading' research** measured by its impact, with almost half of it considered as having a transformational effect on communities and the economy. Much of this can be attributed to international collaborations, which have been crucial to addressing global challenges and raising the profile of Welsh universities as partners of choice in delivering high-quality research with impact. Wales now has its first top 100 university in a prestigious academic ranking of world universities.
18. WHEB supports four groups in Wales to raise awareness of EU funding opportunities and partnership-building with universities across Europe through WHEB's membership of the European Regions Research and Innovation Network. The office and the groups concentrate on the research priority areas of the Science for Wales strategy. Latest Horizon2020 figures show that Wales has captured €76 million in 162 participations since the start of the programme in 2014. HE accounts for 65% of all participations and 77% of the funding received.
19. Universities are cited regularly in the international press for life-changing research outcomes (improving global drug dosage safety or food safety), and are credited for interesting developments (space science and telescopes or the creation of antihydrogen). Our universities have advanced areas as varied as: the prospects of endangered species; seafood sustainability; ways to treat depression; reconstructive surgery; public perceptions of the influence of climate change on Earth's ice masses; responses to community violence; the analysis of political devolution in the UK; and our understanding of both the arts and languages. Universities use increasingly innovative ways to showcase their research to world audiences, including using art and storytelling techniques.
20. Wales now houses the world's first compound semiconductor cluster; universities help to create a vibrant **research and innovation environment**, and provide a highly skilled workforce for companies looking to invest and locate in Wales. Universities can help sell Wales as a business destination through building on their collaborative track record with industry and NGOs in delivering research with real world impact. Participation in international congresses, often with thousands of exhibitors and attendees, helps to increase the university's profile among professionals and influencers; promote the university as a study destination; and

explore collaboration and research opportunities. The Sêr Cymru programme has been an effective marketing tool for Wales and Welsh HE, allowing universities to attract high-profile global and early career researchers.

21. 84% of **students** (National Student Survey 2017) are satisfied with their “excellent education and outstanding student experience” (QAA ‘key findings’). Our 25,000 international students study in a supportive and affordable environment, with bespoke services available (eg study skills provision or visits).
22. Distance learning modules in Welsh history, culture and language, discovering Wales and Welsh and the Hafan portal (providing a snapshot of contemporary Wales’ culture, language, and geography, and showing the Welsh language as a modern and natural part of Welsh culture) are aimed at taking Wales to a wider audience, with potential global reach.
23. Universities compete for students globally, and promote themselves in different ways in their priority markets. Universities have excellent paid-for links in-country (eg with agents or British Council) or attend overseas exchange or recruitment fairs. Universities have also joined Study in Wales at two of the biggest international HE expos (Europe’s EAIE and the USA’s NAFSA). There is a buy-in, commitment and enthusiasm for this joined-up approach, but we recognise that we should also encourage universities to use Study in Wales outside these events.
24. Universities promote on social media, and can target adverts towards markets using agent channels, social media (including Facebook and Instagram), google AdWords and marketing websites. Marketing content can come from marketing rather than recruitment teams, underlining the importance of a broad international view from different university specialists. Wales’ strengths might contrast in different markets: busy, progressive, urban settings can sometimes work better than scenic, rural Wales. Furthermore, the recognition of ‘Wales’ varies across international markets. Setting Wales apart from England, for example, works better in north America, while it is important that we are seen as part of the UK in other markets.
25. We would encourage Visit Wales to support tourism objectives by working with us and our networks to capitalise on visitors associated with universities – from open day visits or conference delegateions, to visits from international friends and family. We are currently discussing with Visit Wales how to use Study in Wales messages in airline-related activity. We would be happy to see access to the Wales brand extended so that Study in Wales could make use of the materials and better align with the Wales brand.

### Attracting large international events to Wales

26. Universities have sponsored, hosted, or been otherwise involved with, eg: large sporting events; a popular UK science festival; and specialist international conferences. During sporting events or international summits, universities provide key infrastructure and personnel (eg international students), and collaborate with government, organisations and companies to offer accommodation and host associated events. A WHEB-organised event has led to Wales hosting a 200-delegate European Conference on advancing the societal impact of science.
27. There are further opportunities for Welsh Government to work with relevant agencies to encourage large-scale international HE conferences. There are also opportunities for Wales to offer bespoke and memorable activities for captive audiences around the events.
  - the annual EAIE, Europe’s largest international HE conference, has more than **5,000 delegates over four** days from 90 countries. It has previously taken place in Liverpool (2016), Glasgow (2015) and London (the 1990s).
  - the EuroScience Open Forum attracts more than **4,000 delegates over six days**.

- the British Council's Going Global has up to **1,000 delegates over three days**.

### Implications of Brexit

28. For our universities to continue to drive the economy and take advantage of future global opportunities, Wales must be on the front foot to benefit from Brexit outcomes. Welsh Government will need to continue to work with the Westminster Government to prioritise research and innovation in Brexit negotiations and ensure that Welsh and UK universities and other partners can continue their involvement in and contribution to EU research. It will also be important to maintain Welsh Government's presence in Brussels, supporting the work of the likes of WHEB, and making it clear that Wales is open for business. We must continue to attract leading academic talent to Wales and enhance mobility opportunities for staff and students. Global competition for the best talent, including researchers, is tough and our attraction as a destination is more precarious at this uncertain time and post-Brexit.
29. Erasmus+ is a significant programme for student outward mobility, responsible for some 46% of all current mobility of UK students. Maintaining and building on levels of outward mobility will be an important way of growing the skills and experience necessary for the UK to be a global trading nation. This would be a pragmatic and cost-effective move given the expense and bureaucracy involved in setting up an alternative replacement scheme at a national level at this scale. However, continued access to Erasmus+ should be coupled with enhanced investment to grow other international mobility opportunities. From 2014 to 2016, €20.9 million was awarded to 144 projects in Wales, of which nearly €10 million was for HE (35 projects).
30. Regardless of the final EU/UK settlement, it is important that Welsh Government: continues to publicly affirm the value placed on EU students and staff and their contribution to Welsh universities; invests in supporting future international recruitment through promotional activity; and continues to provide reassurances to EU students that they will remain welcome in Wales. We must remain open to well-qualified international students, including EU students and their dependants, whatever the wider agreement on the immigration status of EU nationals. Putting up unnecessary barriers to export earnings would be illogical in a post-Brexit world.
31. We need to consider carefully how we target European markets in future, where EU students might be competing against currently-designated international students for visas. Access to grants and loans; access to Erasmus exchanges; free movement; and the perception of Wales as welcoming to EU students will all play into this. We will have to think differently about how to present ourselves – we will be competing against other English-speaking countries globally instead of being one of the few fully English-speaking options in Europe. Universities UK<sup>i</sup> provides further detail about the impact of and support to universities post-Brexit.

### Lessons to learn from similarly-sized countries

32. Connected Scotland<sup>ii</sup> is a visible, long-established and joined-up approach (comprising Universities Scotland; and Scotland's British Council, Royal Society, Enterprise Agencies, Funding Council and Government) which "promote[s] sector worldwide as a place to do business, to work and to study and has also set an ambitious target of increasing the sector's export revenue by more than 50 per cent in six years." Many of its objectives are similar to those of Global Wales. The Scottish Government invests £200k a year in the Saltire Scholarship Education. Offered to international students from priority countries, it: promotes Scotland as a learning and science nation, and as a study destination; and showcases its HE offering in international markets. Ireland, meanwhile, works with [Go Overseas](#) on a campaign (measured in terms of economic impact) costing several hundred thousand pounds to promote study opportunities for international students in Ireland through offering scholarships. Study in New Zealand has run a similar campaign.



### Closing remarks

33. We should consider making better use of alumni, soft power and Welsh diaspora. More world leaders have qualifications from UK universities than any other country, and individuals such as these, together with internationally-recognised alumni and Study in Wales ambassadors (such as prominent sports stars or actors) could be engaged to promote Wales as a destination of choice for international students. We also need to ensure that the 21<sup>st</sup> century reflection of 'Wales and the Welsh' 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.
34. Along with trade and tourism, higher education is arguably the most visible manifestation of Wales overseas. University activity and Study in Wales can benefit Wales as a whole. Universities are part of the fabric of our communities. Working with government, industry and others, universities and the Global Wales partners will 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.
35. We look forward to building on our positive relationship with Welsh Government to pursue these goals.

**Universities Wales, 1 September 2017**

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<sup>i</sup> [www.universitiesuk.ac.uk/policy-and-analysis/brexit/Pages/policies-post-exit.aspx](http://www.universitiesuk.ac.uk/policy-and-analysis/brexit/Pages/policies-post-exit.aspx)

<sup>ii</sup> <http://connectedscotland.org/>

# Agenda Item 4.1

## **Written Response by the Welsh Government to the report of the Economy, Infrastructure and Skills Committee entitled Taming the traffic: The Impact of Congestion on Bus Services**

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Congestion already affects the economy, environment and health of the people of Wales. If left unchecked, and we recognise that demand forecasts indicate that road use will continue to grow, those effects will only worsen. That is why tackling congestion is a priority focus for Welsh Government. It is integral to the Wales Transport Strategy and the National Transport Finance Plan.

We have already put in place a range of measures to help tackle congestion and to help improve the punctuality of bus services, for example, to enable local authorities to adopt powers to tackle parking, bus lane and moving traffic contraventions.

Congestion will be specifically discussed during workshops with our partners later this year following on from the very successful first Wales Bus Summit in Wrexham.

In addition, I have announced a series of pinch-point programmes, including one for the motorway and trunk road network, and one for the local road network. Our transport network needs to be sustainable and that is why the pinch-point studies are designed to look at a range of solutions to congestion problems from public transport to active travel.

I welcome the Economy, Infrastructure and Skills Committee report and a detailed response is overleaf.

## **Detailed Responses to the report's recommendations are set out below:**

### **Recommendation 1**

The Committee recommends that:

As a matter of urgency, the Welsh Government should develop and publish an action plan to set out how it will tackle the impacts of traffic congestion on the bus industry in Wales. The plan should include:

1. Recognition of the scale and extent of the impacts of congestion on the bus industry in Wales, and a firm commitment to tackling the issue.
2. Clear strategic direction for highway authorities and bus operators on the action needed to address the impacts of congestion on bus services.
3. Details of the Minister's commitment to undertake further work to understand the root causes of the issue, encompassing both urban and rural areas. This knowledge should be used to shape the required solutions.
4. How Welsh Government will support local authorities to work in partnership with bus operators to develop and implement bus priority measures, including changes to funding to ensure long term, sustainable solutions.
5. Welsh Government's requirements for bus operators to be more transparent and open about their revenues as a condition of receiving support under the Bus Services Support Grant.
6. Guidance for local authorities on how to establish and maximise the effectiveness of bus quality partnership schemes. Suggestions as to how local authorities can work in a cross-boundary way, using new and existing mechanisms including local and regional planning, to ensure congestion impacting bus services is tackled on a regional basis.
7. Assessment of the full range of tools available and how useful they might be in tackling congestion's impact on Welsh bus services, including: implementation of park and ride schemes, congestion charging, enhanced parking charges, workplace parking levies, and bus priority measures.
8. Plans for a national awareness raising campaign to encourage a modal shift in transport choices in both urban and rural areas, recognising the unique challenges presented by different settings. This must sell the benefits of travelling by bus where this is a viable transport option. Encouraging people out of their cars and onto the bus is a crucial step in providing a sustainable, high quality, reliable bus service for current and future generations.

### **Consideration**

- 1 Recognition of the scale and extent of the impacts of congestion on the bus industry in Wales, and a firm commitment to tackling the issue.

### **Response: Accept**

We recognise the detrimental effects that traffic congestion has on the reliability and punctuality of bus services. In turn, those effects discourage existing bus passengers from continuing to use the bus, and discourage new bus passengers from trying the bus. We are committed to improving bus services in Wales and will undertake further work to ensure the scale and extent of impacts are known. The development of the Next Wales Transport Strategy will include consideration of this issue.

Registered bus services have declined from 1,943 services in March 2005 to 1,058 in March 2015 (Traffic Commissioner reports), with the number of bus passenger journeys declining by around 19% between 2008 and 2015. Whilst these trends cannot solely be attributed to traffic congestion, we recognise the average bus speeds have been reducing. For example Stagecoach submitted evidence to the committee indicating bus speeds have reduced by 2mph between 1995 and 2015, requiring additional vehicles to maintain service levels.

In recognition of these trends, The Welsh Government allocates significant revenue funding to support the bus network in Wales. In the current financial year, local authorities will distribute £25m allocated to them under the Bus Services Support Grant scheme, to help them subsidise bus and community transport services that are not being provided commercially.

The Welsh Government recognises the opportunity to reduce the impact of congestion through the provision of appropriate infrastructure and commits a significant element of capital funding for this purpose including

- Local Transport Fund includes measures to assist the flow of buses.
- Local Transport Network Fund (total £2.8m this financial year) for improvements to the network., including bus specific measures
- Pinch-point removal funding (£48m multi-year package) to address congestion on the network, including buses.

**Financial Implications** – None. Any additional costs will be drawn from existing programme budgets.

### **Consideration**

- 2 Clear strategic direction for highway authorities and bus operators on the action needed to address the impacts of congestion on bus services.

### **Response: Accept**

With the exception of the Trunk Road Network, Local Authorities are the responsible Highway Authority; however the Welsh Government works closely

with Local Authorities and provides strategic direction through Policy development and funding conditions.

The development of a new Wales Transport Strategy provides an opportunity to strengthen the importance of congestion mitigation in the Welsh bus network. The completion of this document is anticipated in 2019.

The guidance for the Local Transport Fund includes objectives to improve connectivity through sustainable and resilient infrastructure. Successful applications meeting these requirements included the following schemes in:

- Caerphilly to reduce congestion at Pwyllypant Roundabout, which is the confluence of strategic bus routes
- Cardiff for junction improvements on the Eastern Bus Corridor at Fitzalan Place/Newport Rd Junction
- Carmarthenshire for infrastructure improvements at the town centre junction on A483 trunk road to address congestion issues
- Flintshire to improve bus facilities and operation in the Shotton corridor
- Neath Port Talbot Improvements to the priority bus corridors between Port Talbot and Margam
- Pembrokeshire for Fishguard Town Centre Access Improvements. Highway improvements to improve traffic flow on the trunk roads

Local (highway) authorities have discretionary powers available to them to help tackle traffic congestion – specifically, parking, bus lane and moving traffic contraventions. To date, only Cardiff Council has applied for and adopted these powers to tackle all such contraventions, although the majority of local (highway) authorities have adopted powers to tackle parking contraventions, that can impinge on the flow of traffic..

We will write to all Local Authorities within the next month to highlight these initiatives

**Financial Implications** – None. Any additional costs will be drawn from existing programme budgets.

### **Consideration**

- 3 Details of the Minister's commitment to undertake further work to understand the root cause of the issue, encompassing both urban and rural areas. This knowledge should be used to shape the required solutions.

### **Response: Accept**

In recognition of the Committee's recommendation that there should be further work to understand the root cause of congestion, our partners – including local authorities and the bus industry – will be asked to report and explain what are the root causes in their own areas ahead of the series of workshops which are planned for Autumn 2017. This will enable summaries to be

produced during the workshops for urban and rural areas, along with recommendations for tackling congestion in those different environments.

The Autumn 2017 workshops are being held at 4 diverse venues across Wales to ensure the particular challenges caused by traffic congestion in urban and rural areas are considered. The workshops will also include activities to identify specific solutions, drawing upon local (highway) authorities' and bus operators' experiences.

The outputs from the workshop will inform future policies and actions to address congestion.

**Financial Implications** – None. Any additional costs will be drawn from existing programme budgets.

### **Consideration**

- 4 How Welsh Government will support local authorities to work in partnership with bus operators to develop and implement bus priority measures, including changes to funding to ensure long term, sustainable solutions.

### **Response: Accept**

Transport for Wales has recently established an Integration Alliance Board (IAB) for the South Wales Metro area, which brings together representatives from the Welsh Government, Local Authorities, Bus operators and User Groups to facilitate closer working arrangements. This model could be rolled out on a wider basis. The IAB has identified a number of work streams, including the identification and development of strategic bus corridors. This will provide a 'showcase' for bus travel in Wales, including opportunities to facilitate greater service reliability.

The Cabinet Secretary for Economy and Infrastructure announced a 5-point plan to support the Bus industry in Wales in August 2016. This included funding for Local Authorities to appoint bus coordinators in North and South Wales. Their remit includes promotion of closer working between stakeholders to develop quality bus partnerships.

The Welsh Government is also considering opportunities to better co-ordinate allocations of funding from the Local Transport (capital) Fund and the Bus Services Support Grant (revenue). The aim is to encourage a targeted approach to investment by public authorities maximise the beneficial impacts. For example route or corridor service enhancements would be supported by associated infrastructure – such as bus priority measures. This approach will

This aim is consistent with a broader approach that is being considered, in which all Bus Services Support Grant could be allocated only in support of bus services which formed part of a Quality Bus Partnership between local authorities and operators (voluntary or statutory).

Once the work to better co-ordinate allocations under the Bus Services Support Grant and the Local Transport Fund has been completed, updated guidance will be issued.

**Financial Implications** – None. Any additional costs will be drawn from existing programme budgets.

### **Consideration**

- 5 Welsh Government's requirements for bus operators to be more transparent and open about their revenues as a condition of receiving support under the Bus Services Support Grant.

### **Response: Accept**

Bus operators will be understandably concerned to ensure that commercially sensitive information about their services is protected, which is helped by minimising the number of organisations or levels which would have access to this data.

As local authorities administer Bus Services Support Grant, we will therefore require local authorities from 1 April 2018 to establish the revenue predicted to accrue to an operator from each route for which that operator has sought Bus Services Support Grant.

**Financial Implications** – None. Any additional costs will be drawn from existing programme budgets.

### **Consideration**

- 6 Guidance to local authorities on how to establish and maximise the effectiveness of bus quality partnership schemes. Suggestions as to how local authorities can work in a cross-boundary way, using new and existing mechanisms including local and regional planning, to ensure congestion impacting bus services is tackled on a regional basis.

### **Response: Accept**

The Welsh Government has already issued detailed guidance to local authorities encouraging them to consider more and closer partnership working with bus operators, and with neighbouring local authorities. There is specific, detailed guidance about voluntary and statutory bus Quality Partnership Schemes, and further guidance was issued following the better co-ordination projects that the Welsh Government funded during 2014-15 in the Vale of Glamorgan and Ceredigion.

Building upon these existing documents and guidance, and practice, this autumn's planned workshops will identify what barriers may still be preventing local authorities from making voluntary and/or statutory partnerships with bus

operators, and more and closer partnerships with their neighbours. Attendees will also be reminded of the existence of the guidance already in place.

**Financial Implications** – None. Any additional costs will be drawn from existing programme budgets.

### **Consideration**

- 7 Assessment of the full range of tools available and how useful they might be in tackling congestion's impact on Welsh bus services, including: implementation of park and ride schemes, congestion charging, enhanced parking charges, workplace parking levies, and bus priority measures.

### **Response: Accept**

These specific points will be picked up during the workshops planned for autumn 2017. As part of the work undertaken by the Bus Policy Advisory Group, advice to local authorities and bus operators prepared by transport consultants the TAS Partnership was published in 2015. This guidance already provides useful advice on funded interventions that can have a positive impact on the delivery of local bus services.

We will circulate links to this document to Local Authorities.

**Financial Implications** – None. Any additional costs will be drawn from existing programme budgets.

### **Consideration**

- 8 Plans for a national awareness raising campaign to encourage a modal shift in transport choices in both urban and rural areas, recognising the unique challenges presented by different settings. This must sell the benefits of travelling by bus where this is a viable transport option. Encouraging people out of their cars and onto the bus is a crucial step in providing a sustainable, high quality, reliable bus service for current and future generations.

### **Response: Accept**

Reflecting their direct and commercial interest, we will seek from the bus industry proposals for a Wales-wide marketing campaign to highlight the attractive benefits of today's bus network, and will contribute to its cost, to be matched by the bus industry.

The Welsh Government is undertaking a pilot offering free weekend travel on TrawsCymru services that will give us a strong evidence base from which to objectively assess the impact of free travel on:

- The propensity of current, non or occasional public transport passengers to make more journeys by TrawsCymru and other local bus



services outside the time periods of the trial, and whether the trial stimulates any sustained modal shift over the longer term;

- Modal choice within rural areas where good public transport services are provided on key routes; and
- The wider economic impact on rural communities and businesses from increased spending on local goods and services by people travelling on free public transport as part of the trial.
- The impact of reduced dwell time on journey time given the removal of the time penalty associated with the collection of fares.

The trial will also help to raise awareness of the TrawsCymru network, encourage people to sample its services for free, generate fare paying passenger growth on TrawsCymru services during weekdays, and strengthen the good will and satisfaction with services among existing users of the network by including them in a free travel event.

The pilot commenced in July 2017; therefore there is limited data currently available to identify the impact of the scheme at this stage. Welsh Government is procuring an independent review of the pilot and will publish its findings once complete. These will inform future activities that promote bus services in Wales.

**Financial Implications** – None. Any additional costs will be drawn from existing programme budgets.

**Ken Skates AM**  
**Cabinet Secretary for Economy and Infrastructure**

## Legislative Consent Memorandum

### Telecommunications Infrastructure (Relief from Non-Domestic Rates) Bill

1. This Legislative Consent Memorandum is laid under Standing Order (“SO”) 29.2. SO29 prescribes that a Legislative Consent Memorandum must be laid, and a Legislative Consent Motion may be tabled, before the National Assembly for Wales if a UK Parliamentary Bill makes provision in relation to Wales for any purpose within, or which modifies the legislative competence of the National Assembly.

2. The Telecommunications Infrastructure (Relief from Non-Domestic Rates) Bill (the “Bill”) was introduced in the House of Commons on 4 July 2017.

The Bill can be found at:

<https://services.parliament.uk/bills/2017-19/telecommunicationsinfrastructurerelieffromnondomesticrates.html>

### Policy Objective(s)

3. The UK Government’s stated policy objective is to support investment in new fibre broadband infrastructure and future 5G communications through the provision of a new 100% non-domestic rates relief for new full-fibre infrastructure. This relief will be provided for a five-year period from 1 April 2017. The relief can be backdated to 1 April 2017 for eligible infrastructure.

### Summary of the Bill

4. The Bill is sponsored by the Department for Communities and Local Government.

5. The key provisions of the Bill provide the framework for the introduction and operation of non-domestic rates relief for hereditaments used for the purpose of telecommunications.

### Provisions in the Bill for which consent is required

6. Clauses 1 to 3 of the Bill amend Part 3 of the Local Government Finance Act 1988 (“the 1988 Act”) (non-domestic rating) to introduce a new relief for hereditaments used for the purpose of telecommunications which are shown on non-domestic rating lists.

7. Clauses 1 and 2 amend Part 3 of the 1988 Act to provide a new formula for calculating chargeable amounts for hereditaments shown on local non-domestic rating lists wholly or mainly used for the purpose of facilitating the transmission of communication by any means involving the use of electrical or electromagnetic energy. The amendments made by these clauses give the Welsh Ministers, in relation to Wales, powers to prescribe further conditions that must be met for the relief to apply, these regulations are subject to the negative procedure.

8. Clauses 1 and 2 also provide the Welsh Ministers, in relation to Wales, with powers to set the level of the relief by prescribing the amount of relief

in regulations. Regulations may also impose duties or confer powers on valuation officers, these are subject to the negative procedure.

9. Clause 3 provides for the same provisions in respect of the central rating list so that telecommunications hereditaments on the central rating list are also eligible for this relief.

10. Clause 4 introduces the Schedule to the Act which makes consequential amendments to both the 1988 Act and the Business Rate Supplements Act 2009. Regulations under this section that amend or repeal any provision of primary legislation are subject to the affirmative procedure. Any other regulations are subject to the negative procedure.

11. As detailed in paragraphs 7 and 8, the provisions include powers for Welsh Ministers to make subordinate legislation specifying conditions which must be met in order for the relief to apply, the amount of relief which is applicable, and the functions of the valuation officer in relation to ascertaining rateable values of eligible hereditaments.

12. Consent is required for these provisions because they fall within the legislative competence of the National Assembly for Wales insofar as they relate to the subject of “local government finance” within paragraph 12 of Part 1 of Schedule 7 to the Government of Wales Act 2006.

### **Reasons for making these provisions for Wales in the Telecommunications Infrastructure (Relief from Non-Domestic Rates) Bill**

13. It is the view of the Welsh Government that it is appropriate to deal with these provisions in this UK Bill for reasons of timing and coherence. It is considered important that Wales has fibre relief parity with England in order to secure investment in new fibre broadband infrastructure in Wales. The interconnected nature of the relevant Welsh and English administrative NDR systems, and the cross-border operation of the VOA as an agency of HMRC, means that it is effective and appropriate for provision for both the Wales and England administrations to be taken forward at the same time in the same legislative instrument.

### **Financial implications**

14. The Bill contains provisions which will allow for changes to the chargeable amounts paid upon hereditaments wholly or mainly used for the purposes of facilitating the transmission of communication by any means involving the use of electrical or electromagnetic energy. This will reduce the nondomestic rates collected from hereditaments eligible for this relief.

15. This policy was announced in the Chancellor’s Autumn Statement 2016 and consequential funding has been provided to Wales which can be used to replace any non-domestic rates revenue foregone.

**Conclusion**

16. It is the view of the Welsh Government that it is appropriate to deal with these provisions in this UK Bill for reasons of timing and coherence. This includes the need to provide parity with England to ensure investment in fibre infrastructure in Wales is not adversely affected. The interconnected nature of the relevant Welsh and English administrative systems also supports provision being taken forward at the same time in the same legislative instrument.

**Mark Drakeford AM**

**Cabinet Secretary for Finance and Local Government**

**July 2017**

Document is Restricted