



Cynulliad
Cenedlaethol
Cymru

National
Assembly for
Wales

Cofnod y Trafodion The Record of Proceedings

[Pwyllgor yr Economi, Seilwaith a Sgiliau](#)

[The Economy, Infrastructure and Skills
Committee](#)

11/10/2017

[Agenda'r Cyfarfod](#)
[Meeting Agenda](#)

[Trawsgrifiadau'r Pwyllgor](#)
[Committee Transcripts](#)

Cynnwys Contents

- 4 Cyflwyniad, Ymddiheuriadau, Dirprwyon a Datgan Buddiannau
Introductions, Apologies, Substitutions and Declarations of Interest
- 5 Panel Addysg—Gwerthu Cymru i'r Byd
Education Panel—Selling Wales to the World
- 33 Prifysgolion Cymru—Gwerthu Cymru i'r Byd
Universities Wales—Selling Wales to the World
- 53 Memorandwm Cydsyniad Deddfwriaethol: Y Bil Seilwaith Telathrebu
(Rhyddhad Rhag Ardrethi Annomestig)
Legislative Consent Memorandum: Telecommunications Infrastructure
(Relief from Non-Domestic Rates) Bill
- 54 Papurau i'w Nodi
Papers to Note

Cofnodir y trafodion yn yr iaith y llefarwyd hwy ynnddi yn y pwyllgor. Yn ogystal, cynhwysir trawsgrifiad o'r cyfieithu ar y pryd. Lle y mae cyfranwyr wedi darparu cywiriadau i'w tystiolaeth, nodir y rheini yn y trawsgrifiad.

The proceedings are reported in the language in which they were spoken in the committee. In addition, a transcription of the simultaneous interpretation is included. Where contributors have supplied corrections to their evidence, these are noted in the transcript.

Aelodau'r pwyllgor yn bresennol
Committee members in attendance

Hannah Blythyn Bywgraffiad Biography	Llafur Labour
Hefin David Bywgraffiad Biography	Llafur Labour
Russell George Bywgraffiad Biography	Ceidwadwyr Cymreig (Cadeirydd y Pwyllgor) Welsh Conservatives (Committee Chair)
Vikki Howells Bywgraffiad Biography	Llafur Labour
Mark Isherwood Bywgraffiad Biography	Ceidwadwyr Cymreig Welsh Conservatives
Jeremy Miles Bywgraffiad Biography	Llafur Labour
Adam Price Bywgraffiad Biography	Plaid Cymru The Party of Wales
David J. Rowlands Bywgraffiad Biography	UKIP Cymru UKIP Wales

Eraill yn bresennol
Others in attendance

Iestyn Davies	Prif Swyddog Gweithredol, ColegauCymru Chief Executive Officer, CollegesWales
Yr Athro/Professor Iwan Davies	Dirprwy Is-ganghellor (Rhyngwladoli a Materion Allanol), Prifysgol Abertawe Pro-Vice-Chancellor (Internationalisation and External Affairs), Swansea University
Dr Christopher Lewis	Pennaeth Addysg, British Council Cymru Head of Education, British Council Wales

Jenny Scott	Cyfarwyddwr Cymru, British Council Director Wales, British Council
Angharad Thomas	Cyfarwyddwr Datblygu Rhyngwladol, Prifysgol Bangor Director of International Development, Bangor University
Amanda Wilkinson	Cyfarwyddwr, Prifysgolion Cymru Director, Universities Wales

**Swyddogion Cynulliad Cenedlaethol Cymru yn bresennol
National Assembly for Wales officials in attendance**

Joe Champion	Y Gwasanaeth Ymchwil Research Service
Robert Lloyd-Williams	Dirprwy Clerc Deputy Clerk
Gareth Price	Clerc Clerk

*Dechreuodd y cyfarfod am 09:30.
The meeting began at 09:30.*

**Cyflwyniad, Ymddiheuriadau, Dirprwyon a Datgan Buddiannau
Introductions, Apologies, Substitutions and Declarations of Interest**

[1] **Russell George:** Croeso i'r **Russell George:** Welcome to the Pwyllgor Economi, Seilwaith a Sgiliau. Economy, Infrastructure and Skills Committee.

[2] I'd like to welcome Members and members of the public to our committee meeting this morning. There are no apologies. Are there any declarations of interest? There are none.

Panel Addysg—Gwerthu Cymru i'r Byd
Education Panel—Selling Wales to the World

[3] **Russell George:** I move to our second item. We have an educational panel in front of us this morning with regard to our inquiry on selling Wales to the world, and I'd be very grateful if you could introduce yourselves for the record. If I start from my right.

[4] **Mr Davies:** Bore da, Gadeirydd. **Mr Davies:** Good morning, Chair. Iestyn Davies, prif weithredwr Iestyn Davies, chief executive of ColegauCymru, yr elusen addysg ôl-16 a sgiliau yng Nghymru. CollegesWales, the post-16 and skills education charity in Wales.

[5] **Ms Scott:** I'm Jenny Scott, I'm director of the British Council in Wales.

[6] **Dr Lewis:** Bore da. I'm Chris Lewis, head of education for the British Council in Wales.

[7] **Russell George:** Lovely. Thank you for being with us this morning. I'll go to Hannah Blythyn for the first set of questions.

[8] **Hannah Blythyn:** Thanks, Chair. Good morning. I just want to start with a quite general opening question about what your views are on where we are in terms of the approach, the strategy, in promoting Wales as a place to come and study.

[9] **Mr Davies:** If I can perhaps start from the point of view of further education, I think there are elements of good practice. I think there are some areas where clearly FE as a particular sector is already working in the space of promoting a kind of export, if you like, by bringing learners into Wales. Colleges have invested, historically, in the past in a venture to support a particular project in Chongqing. That no longer exists, but colleges do invest via ColegauCymru in a European Union international officer, who supports the wider international agenda. I think, from our paper, you'll probably see the overriding principle is that I think we could do a lot better. We could engage much better as a sector with Welsh Government and, indeed, Welsh Government could probably put more effort into working with FE in order to address the particular vocational skills needs that emerging economies and existing economies have that could be met by Wales.

[10] **Dr Lewis:** I think where we've seen quite a lot of improvements in the

last few years is with the Welsh Government's investment in the Global Wales programme, which is a partnership between the universities—Universities Wales, as the body that represents them—us, the British Council, and the Higher Education Funding Council for Wales. As part of that Global Wales partnership, there's a 'Study in Wales' brand, which was launched, a couple of years ago now, in the US. And that's a focal point for activity promoting the Welsh higher education offer—globally, but also within some particular markets that the Global Wales programme has focused on. We think that's a good opportunity for different parts of the Welsh Government—Visit Wales, Trade & Invest Wales, and the education department—to talk to their stakeholders in this area. That seems to be having some success so far. But we also think that it's an initiative that needs to be scaled up. It needs to have smarter and greater investment. It needs to be able to look at new markets as well as those that it's working in at the moment.

[11] **Hannah Blythyn:** I think it was ColegauCymru who mentioned the need for more consistent contact with FE and the role for FE to play, and I think one of the things—. Because we're looking more at recruitment for people to come and study here, one of the things raised in a previous evidence session on selling Wales to the world was actually the role that tourism plays and the links with that in terms of skills and actually making the tourism sector an attractive and well-skilled place to work. I was wondering: what are your views on what we could do on that?

[12] **Mr Davies:** Well, I think one thing we need to ensure is that we still maintain our links with the European qualifications framework, so that we can benchmark the skills that we have in Wales, not just with the remaining 27 EU nations, but those other third-party countries that subscribe and follow the EQF as their model of best practice. I've a real fear at the moment that we will lose that very real link into a global skills system because of the, perhaps, unthought-of consequences of Brexit. And what we'd like to see is an unequivocal commitment by the Welsh Government to maintain that link and to support it through its policy and to support it through its officials, and to continue to work with us. We're very, very privileged to be able to work with the Welsh Government as the national reference point, or national contact point for skills, which gives us, really, a sense, not just in tourism but across all vocation areas, that our skills are world-leading skills.

[13] At this point in time, we have members of FE colleges competing in the WorldSkills programme, who are about to travel to Abu Dhabi. We have the next round of that taking place at a UK level in November. Wales has a

fantastic story to tell about vocational skills in hospitality and tourism, and, like I say, across the whole vocational area, and we need to sell it. The best way, I would say, to sell that message is to work consistently with ColegauCymru, with colleges, to put that global brand that we already have on an equal footing between academic and vocational studies.

[14] **Russell George:** Jeremy, do you have any more questions? Jeremy Miles.

[15] **Jeremy Miles:** I'm just interested in the—. You mentioned in your evidence yesterday, and also I know that you participate in, the Welsh Government's international group. Could you just perhaps outline what the focus is of the activity within that group, and how that supports the work that you want to be doing?

[16] **Ms Scott:** I actually haven't attended a group yet—my colleague Chris has—but it's initially to look at the development of a cross-departmental, I think, international strategy that really starts to link up the parts of Government and external organisations that have an interest in international activity, and how we can perhaps combine to make it more effective. I think we all recognise that there are times when opportunities are missed simply because information isn't shared, plans aren't shared. So, I think this is an opportunity to have a more coherent and joined-up way of working.

[17] **Dr Lewis:** And I would add that one would imagine that there have been cross-departmental meetings about international strategy for Welsh Government in the past, but the departure from our point of view—the encouraging one—is that non-Government organisations have been invited into that conversation, and organisations from the cultural sector as well. In our evidence to the committee, we've emphasised what we think are Wales's cultural assets and the role that they can play in projecting our soft power capital internationally. And I should stress as well that the Welsh Government has been clear that the non-Government participants in that group that attended the initial meeting will be expanded out, so I don't think it's intended to be exclusive in that sense.

[18] **Jeremy Miles:** Okay, so my next question was whether there were any gaps in representation around that table, if you like.

[19] **Dr Lewis:** There inevitably are because of that initial scoping nature of the group, I think, but there's an intention to fill those.

[20] **Jeremy Miles:** Okay. So, it's too early to say that it's had much impact yet because it's in establishment phase, presumably. Would that be a fair characterisation of it?

[21] **Ms Scott:** Yes. It's very developmental, yes.

[22] **Jeremy Miles:** Okay. Thank you.

[23] **Russell George:** Hefin David.

[24] **Hefin David:** The UK Council for International Student Affairs have said that

[25] 'compared with many other countries our non EU recruitment'—

[26] of students—

[27] 'is virtually stagnant—with first year arrivals decreasing, countries like India nosediving but fortunately China keeping the totals as high as they are.'

[28] One of the issues there is UK Government immigration policy. Is it the case that, whatever Wales does, unless the UK Government alters their immigration stance, we'll always be on the back foot compared to other countries around the world?

[29] **Ms Scott:** There's no doubt that the restrictions in terms of working after studying, stringent visa regulations, are having a negative impact in terms of international student recruitment. We understand that the UK Government at the moment has started to look at pilot studies enabling students to work after study, but I think that's very much at an initial phase. I haven't seen the outcomes of that or whether that is likely to be expanded.

[30] One of the countries we have seen slightly buck the trend in the UK is Scotland, and although they are under the same visa regulations as the rest of the UK, they somehow seem to project a more welcoming and a softer attitude. It doesn't mean that they can offer anything more, but I think what they've done is, through their promotion, they've perhaps gone that extra mile to be more welcoming to students. That does seem to be having an impact in their numbers, but I think the numbers at the moment are

decreasing, yes.

[31] **Mr Davies:** I think the position, Hefin, obviously, for FE is slightly different. Where we're running A-level summer schools, for instance, we're dealing with a slightly different cohort, a different set of challenges. What's important is that we maintain the other facilitative networks that allow those different kinds of learners to be able to transit to and from. Obviously, we have learners from Wales going abroad as well via the Erasmus+ programme, which is a two-week programme, generally speaking, in FE compared to a year-long programme, for instance, in HE, as I know you're aware. My concern is that not only will we hinder the movement of learners and students because of the visa restrictions, but the other structures that we've got in place such as the Erasmus+ programme will actually simply fall over when Brexit finally happens. So, I think Welsh Government needs to make a strategic commitment to overcome some of these hurdles, rather than perhaps shrug its shoulders and say, 'Well, actually, that's just a problem beyond our border. It's beyond a Cardiff bay problem or a Cathays problem. It's something that Whitehall has to sort out'. I think it's that level of strategic thought, thinking through the potential offer that FE has to play in a global skills market that desperately needs vocational skills—the UK and Wales are not the only part of the global economy that realises that putting everybody through an HE route is not necessarily the most efficient way of driving skill levels up. And we simply ask for Welsh Government, beyond the FE and apprenticeship division, to be much more engaged with us, so we can support them to support Wales.

[32] **Hefin David:** Jenny, is that what you mean by the welcoming approach, a holistic kind of—?

[33] **Ms Scott:** Yes. And I think it is about the links between the Welsh Government and UK Government in terms of, if there are these pilot programmes, then making sure that Welsh universities are involved in those programmes, and really saying that this is something that they need to work on and look at, including taking students out of the net migration figures. And, so, in effect, really recognising, I think, the positive contribution that international students make to the UK.

[34] **Hefin David:** And they weren't in the net migration figures before 2010, were they? This has happened since.

[35] **Ms Scott:** Yes, they've included them in. And it's something that we've

been requesting, the UK Government to take them out of the figures, but—

[36] **Hefin David:** Decimating the market.

[37] **Ms Scott:** Yes.

[38] **Hefin David:** And, with regard to Global Wales, they are focusing on the Vietnam and USA markets. They're not the growing markets, though, are they?

[39] **Ms Scott:** Well, one of the reasons for selecting the US market was that it is a significant market for the UK for HE, but, actually, when we compared students coming to Wales across the rest of the UK, we were actually underrepresented. And, so, although it's a mature market, we felt that there was, through a concerted effort, a chance to be able to grow that market. And there's a market there. You have to find that and you have to nurture that. Scotland and Ireland have been very aggressive in terms of promoting in the US market.

[40] **Dr Lewis:** And, just to add, Vietnam is very much a long-term strategy. So, it's about establishing a system-to-system relationship between Wales and Vietnam, and the dividends of that for Wales might be found some way down the line. But Vietnam is very much on the agenda and the radar now of a number of mature HE markets like Australia, like the US, and Wales needs to move now, I think, if it wants to see some of the benefits of that further along.

[41] **Ms Scott:** And, also, we know that further education institutions in Wales are interested in Vietnam. It's something that the Welsh Government has been supporting. There's a trade mission going out at the end of November. I think there are going to be at least six or seven—

[42] **Dr Lewis:** There will be three FE colleges and three or four universities on that mission.

[43] **Ms Scott:** So, that's a really positive move. And, as we say, this type of market development is long term. You don't tend to see massive returns within three to five years. It is about five, 10 years down the road.

[44] **Russell George:** What's your experience in being involved in any international missions?

[45] **Mr Davies:** Directly, ColegauCymru doesn't feature in that space, as Chris has pointed out. We supported the incoming mission and an event from Vietnam into Wales, provided Welsh Government colleagues beyond the further education and apprenticeship division with details of colleges who could contribute. So, I'm assuming—it is an assumption, I'm afraid, Chair—that it's those colleges that are now participating in the reciprocal visit. So, there are elements of some green shoots starting to emerge here, of new things, but I think it just needs to be much more systematic and co-ordinated. Our sister organisation, the Association of Colleges in England, is already in this space, and is already, obviously, involved in trade missions. So, naturally, anything that's coming its way is triaging towards colleges in England. We need to be at the table if we want to be able to do that for Wales.

[46] **Ms Scott:** I think there's an opportunity to work more closely with Trade & Invest Wales to look at markets where there is an interest from an education perspective, and an arts perspective. Very often, arts, education, are the calling cards for Wales, and there should be ways of linking them with business to be able to really leverage that and get that higher return on investment.

[47] **Dr Lewis:** And this is one of the areas where I think Global Wales is starting to be successful, because the trade mission that we referenced to Vietnam in November has come about because of Trade & Invest participation in the Global Wales partnership, and identifying the opportunity in Vietnam directly because of that involvement. And, as far as I'm aware, it's one of the first, if not the first, example of Trade & Invest opening up those missions to education stakeholders, and we hope to see much more of that in the future.

[48] **Russell George:** Have you asked to be involved at all?

09:45

[49] **Mr Davies:** We haven't directly, no. The offer is there. As I say, we have an international European officer as a member of our staff. There's a history of some collaborative working, as I mentioned, on the Chongqing partnership with the Welsh Government. The offer is there, but there are 101 other things that we could be doing with that officer, so we're more than happy to oblige and support. There are, essentially, 13 FEIs; only three are

involved in the mission. In a competitive market, which the FEI market is between providers, particularly for global students, then we would much prefer to see a co-ordinated Wales offer rather than an individual college offer, but there's obviously a thin line between what we can do for the sector and treading on the toes of individual colleges that want to expand their reach.

[50] **Russell George:** Sure. That's fine. Vikki Howells.

[51] **Vikki Howells:** Thank you, Chair. I'd like to ask some questions about the Welsh Government's overseas office and your experience with regard to that in promoting Wales as a place to study. The Cabinet Secretary suggested to us that much of the activity of the overseas offices is difficult to quantify, but vital to the Welsh Government's achievements in those countries. What would be your view on that statement?

[52] **Ms Scott:** The British Council, we have offices in 100 countries, so part of what you do is to have to justify your existence in those countries. I think very often, we do—. And most of our countries are income-generating, so you do look at the bottom line, how much income is being generated, et cetera, whether it's through languages or exams. But, actually, we realise and recognise that, at core, it's not about pounds, it's not about income, it's about building relationships, and that is more difficult to put a value on, but it shouldn't stop you evaluating the strength of those relationships and the extent of those relationships. So, what we would be looking for would be—. And a common way to do this is you rank the relationships that you have in those countries, you look at the context that you have, you rate the level of your relationship with them, how easy is it to access partner organisations, how easy to access ministries that you want, how much partnership working do you have, how much co-funding of projects do you have. And so, we actually have a way of being able to not necessarily put a pound value on that, but to look at the strength of relationships we have in a country.

[53] I have to say that, obviously, I don't know what the remit—. I haven't seen the exact remit of a Welsh Government overseas office, and I don't know what a job description looks like in terms of what they have to do, but, if it's relationship building, you should be able to at least start to evaluate that. I think, though, looking at the network, it is quite a small network. I suspect that they are under a lot of pressure and I suspect that there's not a lot of capacity. I know they have offices in China, in India, et cetera, but I did a quick comparison and I looked at our offices in China. We have five offices

and 750 staff in China, and so my first port of call wouldn't be necessarily to the Welsh Government office there, because I would think that they're going to be overloaded and have a lack of capacity. But I think it's about, in a sense, how can we work together, how are they working strategically with the embassies and high commissions overseas, how are they working with the British Council, and I suspect that they've got those—. Hopefully, they've got those links in place.

[54] **Mr Davies:** I think that our written evidence says it all. We've had little engagement. There have been some arrangements where we've helped train and support members of staff from the overseas offices. When a request has been made to ensure that any incoming delegation actually visits colleges, as far as we are aware, that hasn't been forthcoming. So, the doors are open. We're there to be part of team Wales—all of us; wherever we sit in the public policy space in Wales. So, yes, the opportunity is there. I just really wish that other members would take it up.

[55] **Vikki Howells:** I was quite struck by your evidence, actually, that you don't even have a list of names and contact details for overseas staff. Would that be a starting point for improvements in your eyes?

[56] **Mr Davies:** We're launching a report this afternoon that says that this is the economic impact of FE in Wales, this is what the institutions do as well as what the individuals gain from being involved in FE, and anything we can do to further that economic impact, through, essentially, acting as an export—that export actor, but here in Wales. Anything we can do in that is going to benefit communities across Wales. It would be really great if we just took that very small step of opening up those conversations.

[57] **Ms Scott:** We have worked with offices overseas. We've worked with the office in the United Arab Emirates. They were on the programme board for the UK-UAE Year of Culture, which is this year. We've worked with the offices in New York. I think we've linked with offices in China. It's probably not on a systematic basis and so there probably is room for improvement in terms of us letting them know what we're doing as well in the countries that they're operating in. So, there's room for better communication, definitely.

[58] **Dr Lewis:** I would just echo that, really. The need for a systematic approach to the engagement with that overseas network, I think, is there. My experience of working with the network is ad hoc. It has been supportive where it has worked out in that way, but there's no strategic approach to

utilising it from our point of view.

[59] **Vikki Howells:** In the 'Prosperity for All' strategy, the Welsh Government talks about expanding their overseas offices. Is that where you think we need to go? Is it a question of just increasing capacity? Or, does there need to be, as we've alluded to already, a change in the method of working? Or, is it a combination of the two?

[60] **Dr Lewis:** I think it's a combination of the two. We were surprised when we looked at the Welsh Government's evidence to this committee about how small the network is, how modest the budget is for that network. As Jenny has described, we're used to having a really substantial overseas network and we value the ability to be able to call on that for all kinds of support. So, I think it is a mixture of the two, I think. To pick up on the point about it being difficult to quantify, I think there has to be some conviction in saying that this is about more than just export figures. It is about accessibility at the right levels for team Wales, as Iestyn says, to access those overseas markets. It would benefit, I think, from being a more substantial presence and having a more creative way of using that network and engaging with all of the different agencies that could be benefiting from it.

[61] **Mr Davies:** I think, Chair, it's about working smarter as well. We've undertaken a number of overseas visits, one in partnership with the British Council to Seattle. The support we had there from the consulate service was excellent, it was brilliant. There was no sense of it being, 'I work for the UK Government or GB.' There was a sense of, 'We're here to support you and colleges in Wales working with your partners.' The same was the case when we went recently on a visit to the Netherlands. We had great support from the embassy staff there in the Hague. So, it's about just being smarter, and just duplicating—you know, having a parallel universe of embassies or missions—that doesn't make sense at all. Don't forget, beyond Wales—. I'll always recall a comment made to me by an Indian student about 10 years ago on coming to Wales. He genuinely thought Wales was a suburb of London until he jumped on the train. So, people's perception of distance and size and scope is very, very different to ours. Merthyr to Ponty is a long way where I live, but, actually, in a global sense, we need to be really thinking about our footprint as the UK, perhaps.

[62] **Russell George:** David Rowlands.

[63] **David J. Rowlands:** Expanding just a little bit on that, the Learned

Society of Wales said—and this is sort of verbiage you'd expect, I suppose—that:

[64] 'the lack of a coordinated strategy and the disparate delivery of that strategy militates against achieving optimum impact...At present, Wales is promoted by a number of government agencies which appear to overlap.'

[65] Is that your—?

[66] **Mr Davies:** I think I understand what they say. That sounds about right, doesn't it?

[67] **David J. Rowlands:** Do you believe that that, possibly, is militating, then, against your work?

[68] **Dr Lewis:** The need for co-ordination, I think—certainly, when Jenny and I came into post three or four years ago—was obvious. Global Wales, I think, has been a positive response to that because it does attempt to be one point where those different agencies can come together and have a strategic approach to international work. The point that we made at the beginning: I think that needs to be scaled up. There are other agencies and other sectors that could be brought into that co-ordinated approach, but the international group that Jeremy asked about, I think, is an encouraging sign about the direction of travel maybe towards that.

[69] **Ms Scott:** I think we find that, with reducing budgets and budget constraints, the need to work smarter, work more strategically, pool resources, is really important. You don't want to duplicate and create activity where there's already activity. So, it is about working smarter, but it's also about recognising the value of international activity and international work for Wales, and that there is real commitment to that, not just financial commitment but, I think, Government commitment, saying, 'Actually, there is a need to promote Wales globally', and, in addition, work with the UK. There are times, I think, when we need to be part of team GB, where you get those benefits and also, then, times when you need to be team Wales and actually put in additional investment to make that happen.

[70] **David J. Rowlands:** Moving away from that, the UK was recently voted to be the second in the world with regard to its soft influence throughout the world. Obviously, that's very much aligned to education and people being educated here, going back home, and we have that input there. Do you think

Wales has the same impact through these soft interventions?

[71] **Dr Lewis:** We're very, very keen to see Wales make the most of its soft power assets. Education, clearly, is my own particular area of interest, but the arts and sport and governance and civil society excellence is something that I think we should be promoting overseas, but doing so in a co-ordinated way. This is what we keep coming back to, isn't it? In a co-ordinated way, with our trade and inward investment and tourism strategies, so that they're mutually reinforcing. I think a lot of the UK's soft power is built around an idea of the UK that probably doesn't include Wales centrally in it. But I think Wales has got huge opportunities, as a small country, to make the most of its soft power. Actually, soft power for a small country is disproportionately important, we think. I think in our evidence we included the example of Denmark, which has focused on this. There are lots of examples to follow, I think.

[72] **Mr Davies:** I would add, and this is not a point directed particularly at David, but one of the questions we get on a regular basis in our work for the NCP and NRP, this sort of referencing, is: what impact would Brexit have and does it signal the fact that Wales, as part of the UK, is trying to distance from that level of network and support? I don't think that is the intended consequence of any party or any individual, but it is something that we're having to pick up, both in formal sessions and in informal conversations with European partners. It does mean, I think, that a lot of our potential EU partners, like Erasmus, are already starting to question whether or not we can be a sustainable partner with them going forward. Whatever the desire was in terms of the referendum, I'm sure a consequence wasn't that we were going to see young people not being able to spend two weeks abroad to enhance their vocational learning, or indeed not being able to create links between businesses that are outside and inside the European Union. So, we need to redouble our effort. We need to recognise this potential damage that could have been done to Wales's reputation as part of the consequences of the referendum and be committed to ensuring that Wales does have a foothold in the world and doesn't become isolationist by default.

[73] **Russell George:** Hannah Blythyn.

[74] **Hannah Blythyn:** Just a very quick question. Going back to what we were talking about, having an overseas presence and offices, one of the things that came up on our recent committee trip to Brussels was that there seemed to be a feeling there that once we left the EU we'd perhaps need to

increase our presence in Brussels as opposed to decreasing it. Is that something that you would perhaps agree with?

[75] **Mr Davies:** Wholeheartedly. As I mentioned, just on the specific issue of European referencing, that's a global project—it's called the European qualifications framework, but it has global significance—and its locus is in Brussels. We all, as ColegauCymru—and I'd say, personally, even prior to ColegauCymru—have found the joint presence in Brussels from a number of stakeholders, including Welsh Government, incredibly effective, very strong and clearly something that should, in our opinion, be supported going forward. Irrespective of what happens in terms of leaving the European Union, it's a really good resource, a very open-minded team that's willing to build consensus. You don't get the feeling, necessarily, that you're part of a Welsh Government team there. You are in that building on the *rond-point*, there just opposite the Commission buildings, part of team Wales. That needs to continue and, I think, needs to be expanded.

[76] **Russell George:** Jeremy, do you want to ask your question and then move on to your subject?

[77] **Jeremy Miles:** Thank you. I'll deal with them all together, Chair, if I may. Just developing this idea of the overseas network, the other discussion that we had when we were in Brussels last week was really a conceptual question, if you like, about being prepared for the future generally. It was this question, really: in an increasingly digital world, one of the people we spoke to said that geographic representation is important, obviously, but actually we should also be thinking about how we're tapping into different networks, not just different geographic footprints, if you like. I just wonder if you have any reflections on that, how looking at it from a network point of view rather than from a geographic footprint point of view might help or hinder your respective efforts to sell overseas, so to speak.

10:00

[78] **Mr Davies:** Well, we certainly think of ourselves as a networked organisation. We're a small organisation of just some 12 people, obviously working with—. We're actually small in terms of number of colleges and on a global scale. So, having a good online digital presence is important, and again, in our evidence, we've questioned the extent to which the offer there really represents what Wales has to give. What I would say is, in my personal experience, you have to have physical networks between people, and you

build relationships of trust by investing in the short to medium and long term, rather than simply going on some sort of Google Ads campaign to try and promote Wales. So, we have to get it right. We have to be able to prepare to—. If we want this sense of Wales having a position on a global scale, we have to be prepared to invest in it, but invest in those areas that actually bring return. I'm not talking of vanity projects here, and having a number of offices. We need to be laser-like in our focus and ask what will actually give us a return on our investment.

[79] I've mentioned the Brussels office. I've mentioned, maybe, the need to work more closely with the consular and embassy staff, but I think, ultimately, we need to tap into people like the Welsh diaspora that we talk about. How can we create and strengthen the brand that allows every individual who has their origins and sense of identity in Wales to have a very clear proposition for what Wales has to offer and the role it's played in their lives? So, it has to happen at all those levels, but I would hope that we don't simply go down the digital Wales.com route. It has its strengths, it needs to be strengthened, but actually we need to have a physical presence, not just in Wales offices, but in those other networks that we have.

[80] **Dr Lewis:** To pick up on the point of the importance of the physical networks, Wales is fortunate, isn't it, that it has this huge network of Foreign and Commonwealth Office and Department for International Trade presence in every country in the world, and I think there's more that could be done from Wales to assert itself within those networks to make the most of that opportunity, which not all small nations have.

[81] **Ms Scott:** I think online is key, and it is a balance, more and more, whether it's arts, education online, whether it's massive open online courses, live streaming, it is a way for people to access and be able to see, often in real time, what's happening and what's happening in Wales. So, it is an important conduit, but I think as well that there are a range of different networks that are set up that aren't necessarily going to be dependent on whether we are members of the EU, necessarily.

[82] There are a huge range of European networks, and I think one of the things that we're going to need to do is to ensure that Wales remains active and proactive in those networks, and that might mean that there's support given for that. I don't know the numbers. I suspect a quick mapping exercise would tell you just the vast range from across all kinds of sectors, and some of these, there's not necessarily a cost involved other than somebody's time

going to a meeting, but what it does do is that it puts Wales in that group, in that conversation, in that discussion, and some of these networks are coming out with recommendations five, 10 years—. And we need to be a part of that and remain a part of that, because that's going to help the education—not just education, but social, cultural networks to actually remain linked in to Europe.

[83] Physical presence is another thing, and I think we, along with a number of organisations, are struggling to be able to then look at the cost of keeping a physical presence in Europe, and I think time will tell about how that actually pans out for us. But I think losing those networks simply because we think that we shouldn't be in them because we're out of the EU, I think, would be a mistake.

[84] **Mr Davies:** I should probably add, Chair, that I think it's important to maintain and to deepen relationships with regions in Europe as well. So, we're doing a number of pieces of research at the moment at ColegauCymru looking at the areas of Europe that were particularly more resilient following the economic crash, for instance, and trying to understand what happens at that subnational or regional level, depending on how you look at it. We have very, very good working relationships at a very, very high level at the moment with an agency called Tknika, which is a subministry of the Basque region of Spain, and also similar relations with Catalonia, and I think, actually, some sort of bilateral work there between agencies that work in the same space can garner real dividends. My understanding is that Welsh Government further education and apprenticeships division is looking how best to use those sorts of region-to-region, organisation-to-organisation networks as well. So, the picture, I guess, we're presenting is quite complex; it's quite mosaic in its approach. We need to maintain those as well.

[85] **Jeremy Miles:** Can I just go back, then, finally, to the discussion we had at the very start about the international group and the growing focus within Welsh Government on connecting up different efforts, if you like? To what extent do you feel that your work would be enhanced by having, from a political accountability perspective, a specific portfolio responsibility for external affairs in the Welsh Government, which would generate questions in the Chamber, and perhaps more activity around the international-facing work of the Welsh Government?

[86] **Ms Scott:** I think it would be helpful. At the moment, if we want to talk about our work in terms of international, it's not necessarily easy to find who

you should be talking to. It's dispersed across a number of different departments, and it's often not clear where funding is available or where funding would support that, and so it's a bit of trial and error rather being able to really be more effective and maximise the resources. So, I think that would be useful, yes.

[87] **Mr Davies:** I think, personally, I would reflect on the fact that it's the principal secretary to the First Minister who leads on the international group, so that, essentially, ensures that international issues are the First Minister's domain, but we would encourage all AMs to ask internationally orientated questions on the issues of further education and skills and vocation, for instance, to the various Ministers and Cabinet Secretaries. So, I think it's totally appropriate that those questions are asked at that Cabinet level as well. I think the danger is that, you know, if you put an individual whose name or business card has that on it, they become the only person who takes responsibility. If we really want to internationalise Wales, it has to run horizontally as well as vertically across Government.

[88] **Ms Scott:** But I have to say, I think if we look at other parts of the UK, Wales is unusual in that you don't have a separate ministerial portfolio for international, and I think, going forward, whilst it's great that it's under the First Minister, because it can get that—you have to look at the time that's available to be adequately spent on that, and whether you do get the kind of drive and push that's needed, particularly, I think, post Brexit, when there's going to have to be a real focus on international activity.

[89] **Jeremy Miles:** Thank you.

[90] **Russell George:** Iestyn, you mention that you're doing a piece of work on other regions of Europe. Is that something that you're completing soon, that piece of work, and could share with us?

[91] **Mr Davies:** Yes, when it's complete, I'd be more than happy to present it to you, Chair. Again, it's funded via our participation in the European networks—I think it's the EQAVET network, rather than the ECVET network, that we're part of. It brings in a small amount of funding on a global scale, but a £100,000 research project for us, as a small charity, is a big piece of work. My colleague Rachel Bowen is leading on that, and we have, I think, in the next few weeks, the first field studies taking place. Again, that's by networking with similar regions in Europe, making sure that we understand the regional dimension of what it means to be part of a federal structure. So,

I think, again, it's information we can pass to you, and I think it will be very interesting reading, because it's looking at to what extent the higher skills levels can contribute to economic resilience, or whether or not, actually, there are other factors at play that allow a region to be more resilient, other than just skills.

[92] **Russell George:** When do you expect to have that piece of work completed?

[93] **Mr Davies:** I'm hoping Rachel will text me or something and give me the answer so that I can confirm that to you—my phone is buzzing—but I can confirm that to the clerk.

[94] **Russell George** That's fine.

[95] **Mr Davies:** It's in the next year.

[96] **Russell George:** Okay. If there's anything you can share in the next few weeks, obviously that would be able to influence our inquiry, but if not, we're still interested in the piece of work. Mark Isherwood.

[97] **Mark Isherwood:** Thank you. Could I start by asking you a supplementary to one of Iestyn's answers about the diaspora? When we were in Brussels last week, we had a meeting with an Irish representative, and I asked her the question about how Wales could learn from how Ireland had engaged with its diaspora, and the response we got, particularly in terms of their experience after the 2008 crash, was that the wrong thing to do, and what they did initially, was to ask the diaspora how they could help them. Rather, it was a question of engaging with them and seeing how they could work together, wherever they may be. When you propose better engagement with the diaspora, what sort of engagement do you have in mind?

[98] **Mr Davies:** I think it is about building a brand Wales around key, defined days in the calendar. St David's Day is the obvious one, but it's also using the other cultural capital that we have—you know, around celebrating a Welsh Christmas abroad, trying to tap into that sense of, I suppose, *hiraeth*, if you like, that sense of identity around key activities, and then actually looking specifically at the sector-wide leaders we do have who hail from Wales, in areas particularly, for instance, in the science, STEM economy. And it's been very, very specific. There's more than one individual who's made a success out of technology, but we tend to focus on the same people time and

time again. I don't think it's beyond the ability of any individual to draw up just the top 100 of Wales's most influential expats, for instance, and start to be very strategic and very direct in that approach. Maybe it happens, I don't know, but no-one seems to be linking with us to say, 'Do you know this person is a leader in their field and they trained at X college or Y university?' And I think that level of engagement would actually just go a very long way.

[99] **Dr Lewis:** I would add—. I hope this isn't too tangential to your question, but there's a huge network of alumni internationally. So, there are 25,000 international students in Wales now and a huge number of alumni of our colleges and universities overseas are, by definition, starting to occupy influential positions in the business, cultural and political worlds in those countries. We don't think at the moment there's a co-ordinated approach to engaging with that group, and I think it might be one of the options if the Welsh Government and its partners wanted to expand its use of education to further Wales's international interests—doing so, even ahead of engaging with the Welsh diaspora, might be a fruitful thing to look at.

[100] **Ms Scott:** I mean, there are more world leaders who have been educated in the UK than anywhere else. It's about taking advantage of those, and there are countries, such as Australia, that have been able to come to agreements with the higher education sector—data protection issues and confidentiality issues aside—to really make their mark. We know from universities that we work with that they've got access to the highest levels in ministries and countries because of students who have gone back and they can be hugely influential, and is this thing about—? You know, there are ready-made networks around the world, and it's about how we work smarter to be able to access and use those.

[101] **Mark Isherwood:** Okay. Well, I'll move on to my—

[102] **Russell George:** Can I—? If I ask Hefin, then I'll come back to you.

[103] **Mark Isherwood:** Sorry—.

[104] **Hefin David:** Just on that point, I mean, having worked in the sector as an academic, it's not my experience that the alumni networks are particularly well developed. It's not a priority for universities to grow and develop their alumni networks, and I would assume FE as well. So, that goes both ways, doesn't it? We require the institutions to do that as well.

[105] **Ms Scott:** Yes. I think we're seeing a change in that area. I think universities now are very well aware of the value of their international networks and our alumni and are making proactive attempts to ensure that they maintain those links with them. Probably trying to model more the American model of alumni development now—so most universities now recognise that and when they go overseas will have events for alumni et cetera on a very regular basis.

[106] **Hefin David:** Once you're out everything changes. [*Laughter.*]

[107] **Russell George:** Thank you. Mark.

[108] **Mark Isherwood:** Thank you. We know that a number of non-EU member states in the European Economic Area, European Free Trade Association and outside have access to some EU programmes, such as Erasmus, for example. We don't know what the agreement will be in terms of UK and therefore Wales's access to these programmes after we leave, but beyond what you've told us already, can you think of any other areas where you believe the Welsh Government could change its approach to selling Wales in terms of education and skills in consequence of leaving the EU?

[109] **Mr Davies:** I think that that's a very good question, because I suppose our focus is on the existing EU Commission-led networks, so, obviously, the European Council will persist, and I'm assuming the UK will still be a part of that sort of level of network. But I think that the real challenge at the moment is to press upon the UK Government the value of the existing structures that we have and if there's any way that they can persist in whatever kind of settlement that actually emerges post Brexit, I think we just need to keep that message loud and clear that we gain so much from being a network. We've talked about alumni, we've talked about the diaspora. I think the phrase is that fortune favours the networked mind, and we need to be part of those knowledge networks, and we need to be part of the conversation that does actually transcend our borders, and whatever the Welsh Government can do to maintain that, including pressing upon the UK Government the importance of not being in isolation, I think, is where it needs to start.

10:15

[110] **Dr Lewis:** Yes, I think we've heard some clear commitments from the Welsh Government to programmes like Erasmus+ and Horizon 2020. It's important that that voice remains loud and clear, and we hope to support the

Government in getting those messages out there. Erasmus+ is important, because it brings funding in for international work into Wales. British Council, with our partners, is the national agency, as you might know, for the programme, and €8 million, in the last year, has come into Wales to promote international work through that programme.

[111] It's also about more than higher education. Iestyn has referenced the large numbers of vocational learners who utilise that programme to spend some weeks on work placements in Europe. And to continue to sing loudly about the value of that for Wales, across all of our communities and sectors, I think is something that we would encourage the Welsh Government to do.

[112] **Ms Scott:** Yes, it's not just education—it's youth, it's adult education. It's a significant programme and I think, since it started, Wales has benefitted by over €20 million, and thousands of people have been able to go on mobility programmes, and academics and teachers have been able to go on programmes, and there's a lot of sharing of best practice. I think what we would want is for the Government to continue to invest in initiatives such as Global Wales and to look to expand those initiatives.

[113] I think there are other things that could be done. We've mentioned potentially opening up trade missions and being more strategic and clever and aligning those opportunities. I think there are things that Wales could do. Looking at scholarship programmes, a number of countries offer scholarship programmes—Australia, New Zealand, Scotland, and Northern Ireland sends students to North America. You pick the markets that you want to make that impact in, and for a very reasonable amount of money, working with the education institutions, you can offer scholarship programmes that would start to have a ripple effect in a country and have the impact that you want, so if you want to go into a new market, it's a great way to go into that new market. You're meeting with Ministers, and it's an easy way for a Welsh Government Minister to meet their counterpart, because you're actually going in with an offer, and it doesn't have to cost hundreds of millions; you can do it with a modest amount of money and goodwill and working with the sectors to enable that to happen.

[114] So, there are other ways of being able to support and it's about the Welsh Government maybe providing the right environment and encouraging institutions to look at exporting, to look at not just recruiting students, but international partnership, transnational education—more and more institutions have got joint programmes abroad, campuses abroad, and it's

about providing the support to enable that to happen.

[115] **Dr Lewis:** I think as well, and this may not be entirely within the remit of this committee, but it shows the interconnected nature of this issue—that encouraging internationalism at home is absolutely crucial if Wales is to have a global future. We're very interested in modern foreign languages, we've seen a precipitous decline in the numbers participating in that and the intercultural skills that you need to do business internationally, to promote yourself as a nation, internationally, are crucial, particularly in the context of Brexit, where, as we've heard, many of the existing networks that Wales is automatically plugged into in Europe may or may not continue to be there in the next few years. So, support for internationalism at home is essential.

[116] **Mr Davies:** There's a question now that needs to be asked of Welsh Government. We've talked about maintaining networks, putting pressure upon the UK Government and understanding explicitly what it means for Wales if there's a less than positive settlement, post Brexit, in these international networking terms, but the bottom line is that we would make a very, very direct challenge to Government that, if that is to fail, if that doesn't happen, if it doesn't emerge, then actually it needs to take unilateral action to ensure that we maintain as part of the European qualifications framework, that we maintain funding into something similar to Erasmus+, if it's not Erasmus+ as part of the formal network, and ultimately, the plans and proposals it has to establish a tertiary education and research commission—that that body becomes an internationally minded, outward-looking body and not just looking at the specific needs of the here and now, but understands itself, particularly for FE and HE, as an international sector. So, that's a commitment that Welsh Government has to make in this consultation process. And if it comes to making it a personal commitment, then the Welsh Government has to say, 'We will continue to do something similar to Erasmus+ and these European networks if we can't get that support from the UK Government'.

[117] **Mark Isherwood:** And, finally, what, if any, other risks and opportunities do you believe are posed for the Welsh education sector by leaving the EU?

[118] **Mr Davies:** Where do I start? By inviting you to another, I suppose, seminar on policy documents. We did receive funding from the Welsh Government to look at how to enhance European provision. Sadly, that became a kind of, 'How can we understand the impact of the loss of

European structural funds on FE?’ We have a report that we will be releasing fairly soon, which the committee, and the clerk and staff and Members, are invited to.

[119] I am deeply concerned—deeply, deeply concerned—about the impact of the loss of not just structural funds, but the sense of a Welsh education system being part of a European and therefore a global network. I’m deeply concerned about the impact that will have on outcomes for learners, and more importantly for society in Wales.

[120] **Dr Lewis:** The proportion of faculty in our universities that are EU nationals not from the UK is substantial, and of course those faculty are crucial to the universities maintaining their global reputation for being one of the places of choice for the best academics to come and do their research and to teach. So, for our universities to remain excellent, and to remain therefore being a central part of our offer to the rest of the world, I think the continued participation of EU nationals in our faculty and in our research staff is very important.

[121] **Ms Scott:** I think that the Welsh Government’s going to have to look wider as well. So, it’s going to have to look outside of the EU and perhaps look at markets where it can start to develop new links and additional links. It’s going to have to go wider than, perhaps, its current network.

[122] **Mark Isherwood:** Thank you for that, because clearly the question was focused not just on the EU, but internationally, on what risks and opportunities this might present.

[123] **Russell George:** Adam Price.

[124] **Adam Price:** Hoffwn i droi yn olaf at y cwestiwn o sut y gall Cymru ddysgu oddi wrth wledydd bychain eraill, yn arbennig, efallai, y rhai sydd yn ddiwladwriaeth. Roeddech chi, lestyn, wedi cyfeirio at Wlad y Basg ac at Catalonia. Mae pawb wedi clywed am Catalonia erbyn hyn, rwy’n credu. Efallai y dylem ni ddatgan annibyniaeth. Ond pa wersi mae gwledydd fel hynny yn eu cynrychioli

Adam Price: Yes, I’d like to turn, to conclude, to the question of how Wales can learn from other small nations, especially those that aren’t on a state level, or don’t have that identity. You, lestyn, just referred to the Basque Country and Catalonia. Everyone’s heard about Catalonia by now. Perhaps we should declare independence. What lessons can we learn from such nations in terms of

i ni o ran hyrwyddo ymwybyddiaeth o Gymru dramor? promoting awareness of Wales abroad?

[125] **Mr Davies:** Yr hyn yr ydw i wedi'i weld yng Ngwlad y Basg a Chatalonia, a hyd yn oed mewn talaith fel Swydd Washington, Washington State, pan aethom ni draw—ac roedd Chris gyda ni fel rhan o'r ymweliad hwnnw—yw ei fod e'n dechrau efo cysyniad a rhyw ddealltwriaeth o hunaniaeth economaidd, ddiwydiannol. Ym mha bynnag ffordd rydych chi eisiau sôn amdano fe, mae yna *identity*, mae yna ddealltwriaeth, mewn llawer o'r ardaloedd yma eu bod nhw'n ardaloedd lle mae manwerthu neu dechnoleg, neu mae yna ddiwylliant yn y maes bwyd ac amaeth yn bodoli, ac yn creu llwyfan, felly, i ymdrechion yr ardal neu'r dalaith neu'r wlad, beth bynnag yw'r cyd-destun, er mwyn iddyn nhw ddeall eu rôl nhw yn y byd yn ehangach.

Mr Davies: What I have seen in the Basque Country and Catalonia, and even if you go somewhere like Washington State, when we went over there—Chris was with us as part of that visit—it all begins with a concept and some understanding of identity in terms of the economy and industry. However you want to phrase it, there's this understanding or identity in many of these regions, that they are an area of technology, or of retail. Or they have a farming and food culture, which provides a platform for them to promote that region, state or nation, whatever the context may be, so that there's an understanding of their role within the world, speaking more broadly.

[126] Mi oedd yn rhywbeth y gwnaeth effeithio arnaf fi yn bersonol, trwy ymweld â Gwlad y Basg—jest gweld y ddealltwriaeth o'r hunaniaeth yma, ac os oedd hynny yn bosibl mewn ardal neu wlad neu diriogaeth a oedd wedi dioddef siwd gymaint yn y cyfnod Ffasgaidd yn Sbaen, mi ddylem ni fel gwlad, fel cenedl, fel pobl, ddysgu o hynny er mwyn deall beth yw ein cynnig ni i'r byd y tu hwnt i'n ffiniau.

What had an impact on me personally when I visited the Basque Country was just this understanding of the identity there, and if that is possible in a region or a country or a territory that suffered so much under the fascist regime in Spain, we as a nation, as a country and as a people should learn from that in order to understand what our offer is to the world beyond our borders.

[127] Mae'r un peth yn wir, mae'n debyg, fel ddywedais i, am daleithiau The same thing is also true, as I said, of other states and regions. So, it's

a rhanbarthau eraill. Felly, nid yw'n not just a question of how gwestiwn o ba mor annibynnol neu independent or how much power or ba mor ar wahân yw'r pwerau y tu autonomy there is in those areas. It fewn i'r ardaloedd hynny, ond mae'n rather begins with the concept of dechrau efo'r cysyniad o'r hunaniaeth identity there, namely that that honno, sef bod gan yr ardal neu'r region or country has something to wlad rhywbeth i'w gynnig i'r byd y tu offer the wider world. hwnt i'w ffiniau.

[128] **Adam Price:** And turning to the British Council, I know the former President of the Basque County, Ibarretxe, who was responsible for the Guggenheim in Bilbao among other things, makes the point, to agree with Iestyn's analysis, that culture is the key—it's with a 'k' in Basque as well, which kind of helps—that sense of nationhood and a clear identity that then can be projected externally. Would you agree with that? I'm particularly interested in your suggestion of the role potentially of a regular international festival or expo as a platform whereby that identity could be represented to the world.

[129] **Dr Lewis:** Given the specific question about the expo and the sub-state aspect of your question, then Scotland is somewhere I think we could look at. Looking at the way that they promote their education system there—. We started our evidence to the committee about asking the Welsh Government to consider an integrated international strategy. Now, Scotland has something that's much closer to that than Wales does. The Connected Scotland initiative is the model on which Global Wales is based, and it's been around for a little bit longer. They have the Saltire Scotland Scholarships programme, which is doing some of the things that we're saying the Welsh Government should consider. They actively promote internationalism far more vigorously in their schools than we do in Wales, and their record on modern foreign languages, for example, is there.

[130] And then on top of that, on this idea of culture being the key, the Edinburgh International Festival, the long-term public investment and co-ordinated approach to making that a platform for Scotland, crucial to its global positioning and reputation, I think reveals quite a co-ordinated and deep understanding of the role of culture and education in projecting outward a vision and a version of a nation. And Wales has spent, very successfully, two decades building a nation, but part of nation building is projecting that idea and concept of Wales outward as well, and culture is the key.

[131] **Mr Davies:** Mae'n rhaid inni ofyn, er enghraifft—. Fel y dywedais i, mae'r gystadleuaeth sgiliau rhyngwladol yn bodoli ar hyn o bryd, ac mae'r gefnogaeth mae'r Gweinidog Sgiliau a Gwyddoniaeth a Gweinidog y Gymraeg a Dysgu Gydol Oes wedi ei rhoi i'r fenter honno yn rhywbeth i'w glodfori a'i nodi, ond nid wyf yn siŵr—ac efallai mai diffyg tystiolaeth ydyw o fy rhan i yn hytrach nag unrhyw beth arall—o ran cyrff eraill ac adrannau eraill Llywodraeth Cymru, am y defnydd y maen nhw'n ei wneud o'r brand a'r llwyddiant hynny ar hyn o bryd. Rydych chi'n sôn am gyrhaeddiad a chyflwyniad o lefel sgiliau fyd-eang a'r gallu i ennill ar lefel sydd yr un mor dda ag yr oeddem ni wedi gobeithio y buasai ein tîm pêl-droed ni wedi cystadlu arni yn ddiweddar. Mae gennym ni stori, mae gennym ni neges, mae gennym ni elfen o'n diwylliant ni sy'n ymwneud â gweithgynhyrchu, diwydiant a masnach sy'n stori gref iawn dros ben, ac rwy'n credu ei bod yn bwysig ein bod ni'n datgan y stori hynny a'n bod ni'n ei gweiddi hi yn glir ar lefel ryngwladol. Mae'r ffaith ein bod ni'n bodoli yma yn y bae, ym Mae Caerdydd, yn rhan o'r hunaniaeth a'r etifeddiaeth hynny, ac mae'n bwysig ein bod ni'n gwneud y gorau o'r adnoddau sydd gyda ni ac o'r hanes sydd gyda ni.

Mr Davies: We have to ask, for example—. As I said, there is an international skills competition and the support that the Minister for Skills and Science and the Minister for Lifelong Learning and Welsh Language have given to that is something that we should celebrate and acknowledge, but I can't say that I'm certain—and perhaps it's a lack of evidence that I've come across, rather than anything else—what use the other bodies and the other Welsh Government department are making of the brand and its success at present. You're talking about achievement in skills at a global level, and being able to succeed at such a level as we would have hoped to see from our football team recently. We've got a story, we have a message, we have a cultural history in relation to manufacturing and industry that is a very, very strong narrative, and it's important that we tell that story, that we shout it out, that we make it clear on the global stage. The fact that we are here in Cardiff Bay is part of our identity and heritage, and it's important that we make the best that we can out of our resources and our history.

[132] **Ms Scott:** I think, for us, there are a number of different festivals there, but I think, when you look at what different countries are doing now, it's

clear that that kind of international platform in a country that brings in cultural excellence across many different sectors is a way of not just showcasing your own artistic excellence, but also of bringing in arts from around the world. So, you're also offering that to your own audiences. I think we felt that, around that, you then bring in opportunities. We send theatre to the Edinburgh festival, but in effect, if you try to send people and send people overseas, it's considerably more expensive than bringing in 20, 30 or 100 promoters for them to be able to see and access what's available in Wales. And also, not just in terms of promoters, but having those industry figures come in so that they're industry events as well, which is the commercial side of that. And that is important. And I think that there is a need to look at what kind of model could work for Wales. It doesn't mean following the Edinburgh festival or following what they're doing in Glasgow, Dublin or Barcelona, or whatever, but it means looking at how, with some judicious support, you could actually provide that international cultural platform in Wales. I think it is something that would have that benefit because what it's done—.

10:30

[133] One example: if you look at the Edinburgh festival, what they've been able to do around that—and I think the Welsh Government has already potentially looked at this through their evidence—is that there's now a biennial culture summit that happens at the same time as the Edinburgh festival. Now, that's only been going six years, but last year they had over 40 Ministers of culture and senior people from cultural communities around the world at that event. So, what it does is it starts to bring in senior decision makers and influencers into your country. So, there's this thing about being able to do that on a regular basis.

[134] Sporting events are fantastic but they're ad hoc. You might have one or two and then you may not have anything for a while. It's about creating that regular opportunity and about other countries then seeing Wales as a place where they want to come, they want to showcase what they're doing and they can see that there's best practice and things going on that they want to share. So, I think it's just about taking a look and doing some research on what kind of model could work in Wales.

[135] **Adam Price:** A couple of quick supplementaries because I'm very interested in this. In the spirit of team Wales, I don't want to put you on the spot, but if this committee were to recommend something along these lines,

is this something that British Council would be willing to co-invest in in the early stage development of this platform? Have you got an idea of a—? You know, would we need to choose a particular theme? You talked about being distinctive, which had relevance to Wales, and have you got any ideas about that? And would it necessarily have to be in Cardiff?

[136] **Dr Lewis:** We think that some of the most successful platforms, recurring platforms of this kind, have grown from small beginnings and therefore have got an authentic story about the country; they are of that place. And one of the things that's not optimal about having these big one-off events is that they don't have that authentic story about a place attached to them. So, without pre-empting any research that will be done, one of the things that we would certainly advise that that work looked at was what is already here that can have a focus or a multi-agency look at, that has already roots in Wales and something distinctive to say about Wales, and that can be built up. So, that would be our thinking on it.

[137] **Mark Isherwood:** Llangollen?

[138] **Ms Scott:** Sorry?

[139] **Mark Isherwood:** Llangollen.

[140] **Ms Scott:** I wouldn't want to pre-empt, because you've got to have a financial model that works, and the sector has to buy into it. I think it's something that Government can nurture and can support but shouldn't necessarily direct, because they haven't necessarily got perhaps the right artistic credentials to be doing that. So, I think it's something that has to be led by the sector and the sector has to absolutely buy into it. But I think what we can do is look at what kind of model would work, what makes most sense, and also recognise that you are looking also for some kind of economic value and return on that investment.

[141] So, in terms of where it would be, I wouldn't want to pre-empt, but you need it to be some kind of large conurbation because you want to get that, and you want to be able to host that. So, again, it's looking at what model would work for Wales, but it's a very popular model. You look around the world now, whether it's Australia, whether it's Canada, they've all got their international festivals, and it's about what would work best for Wales, and doing some research that would do that. It's something that we have looked at and said that, you know—. I think there has been some previous

research in this area but, as I say, it's something that we would look in terms of whether or not we could co-fund that kind of research, and just have a hard look at that.

[142] **Russell George:** We're just pushed a bit for—. Did you have any further questions? Iestyn wanted to come in. Iestyn.

[143] **Mr Davies:** It was just to remind us that culture is more than just art and visual arts and drama. Culture and identity of a place, again, as I've learnt now—perhaps I never thought about it prior to working with ColegauCymru—. A region and a nation can have an identity that's built on its industrial and manufacturing and natural produce just as much as it can on its culture, its song, its dance, its drama. And I think, possibly, in Wales we've neglected to focus on that contemporary industrial culture of innovation for a number of reasons in favour of the cultural product that is easier for us to package and to put on stage. The lesson I've learnt from the Netherlands, from the Länder in Germany, from Washington State in Seattle, and from the Basque Country and Catalonia is that a nation can and should have pride in its industrial and commercial story as much as it does in its arts story.

[144] **Ms Scott:** Absolutely, and I think one of the things you do is this: the hook to bring people in may be the culture, and then what you've got as substance as well is in terms of the business links that are created around that. These things shouldn't happen in isolation; it should be connected with business.

[145] **Russell George:** Can I thank you for your time with us this morning? We're very grateful. If there's anything else you think of that you want to let us know about, please drop the committee a note. We're very grateful for your time this morning.

[146] **Ms Scott:** Thank you very much.

[147] **Russell George:** We'll take a 10-minute break.

*Gohiriwyd y cyfarfod rhwng 10:35 a 10:47.
The meeting adjourned between 10:35 and 10:47.*

**Prifysgolion Cymru—Gwerthu Cymru i'r Byd
Universities Wales—Selling Wales to the World**

[148] **Russell George:** I move to item 3 with regard to our inquiry into selling Wales to the world. On this panel, we've got a panel of experts, with regard to our inquiry, from Universities Wales, and I'd be grateful if you could introduce yourselves for the record.

[149] **Ms Wilkinson:** Amanda Wilkinson, I'm the director of Universities Wales.

[150] **Professor Davies:** Professor Iwan Davies, pro vice-chancellor, Swansea University, and chair of Global Wales.

[151] **Ms Thomas:** Angharad Thomas, director of international development at Bangor University.

[152] **Russell George:** We're very grateful for your time with us this morning. Members have a series of questions, and I'll come to Hannah Blythyn to start with.

[153] **Hannah Blythyn:** Thanks, Chair. Good morning. I'm going to start by asking a broad question about where you think we are, in Wales and in the Welsh Government, in terms of our approach and strategy to promote Wales as a place to come and study.

[154] **Professor Davies:** Wales is a very important actor on the world stage, because of its association with the UK. UK higher education is world leading, and we in Wales benefit from that association. Our big challenge, of course, is how we differentiate ourselves from the rest of the nations of the UK, and how we can present Wales both as a vibrant nation, but also as one where the higher education sector is one of the strongest in the UK.

[155] **Ms Thomas:** I think, if I could add there, in terms of operationally, on the ground, Wales lacks profile on the ground in terms of recruiting international students and in terms of that export. So, with the work undertaken through Global Wales over the last few years, certainly, we've made very positive steps towards having a joined-up approach in terms of targeting a number of countries, not just in terms of international recruitment, but also in terms of developing strategic links between countries. But I think that, going back to international recruitment, it is very

much based on—. We tap into the British Council efforts and into their machinery, but I think, as Wales, we do lack profile in terms of a country and there's very little understanding of Wales. I think that there's more we can do in that context.

[156] **Ms Wilkinson:** What I'd say is that what we've tried to do over the last couple of years through 'Study in Wales' is try and change that a little bit. We've looked at what other nations have done, particularly Scotland and the Republic of Ireland, which are very developed in terms of how they promote themselves overseas, which is why we have tried to develop the 'Study in Wales' brand and promote that for use by universities and also for use by Welsh Government and collectively to try and promote Wales as a study brand.

[157] We're still in the very early stages with that and we will reconsider this year what more investment needs to go in, but I think we're starting to develop—it's one of those things that we can't do alone; this has to be a collective effort between us, Welsh Government and the British Council really to try and build this brand. So, I think we are starting to do that and starting to do it more effectively. We're having very productive conversations with Visit Wales, for example, in relation to branding. We need to try and look at how we're sharing resource and putting forward a reasonably joined-up brand for Wales. So, I think that's starting to happen, but I think, as we look forward perhaps, to our next three-year planning period, we need to really think about how we're going to push that.

[158] **Hannah Blythyn:** We're talking a lot in this inquiry about 'brand Wales' and what that means. What would you say if you were trying to encourage students to come and study here? What is the biggest selling point in terms of attracting people to Wales? What should we perhaps be promoting and pushing more? What should the Welsh Government be pushing more?

[159] **Professor Davies:** I think what you have to appreciate is that we've got very successful institutions that are well known globally. The key differentiator is that they are known globally, but they actually exist in Wales. Of course, if you think about it, many universities were in being before Cardiff became the capital of Wales, so in that sense, our traction as institutions is really very well established in the historic marketplace. So, what we've sought to do is develop a strategy around celebrating the strength of our institutions, and that has to be done on a joint basis and several bases, and also of course the significance of what Wales has done by

creating our own higher education system. It is our system that we are now celebrating and offering to the world. So, when, as part of your inquiry, you're asking 'What is selling Wales to the world?', also, I would say to you, part of our task is to bring the world to Wales, and that's very important in terms of the way in which we see ourselves as universities. So, Wales as a brand is an important part of the context and is also part of what our alumni remember—they remember their environment and they remember the culture of Wales and many of them remember the significance of Wales as an emerging country whilst they were here maybe 20, 30 or 40 years ago.

[160] **Russell George:** Can I ask as well—? If I can add to that question: what lessons can be learnt from Scotland or Northern Ireland in terms of branding?

[161] **Ms Wilkinson:** Just taking the first bit of that and then maybe the second bit of that, we have key market advantages around quality, which is a key indicator internationally. We've got to remember that the UK is the second biggest player in international education. For Wales specifically, what comes through very strongly from some of the analysis that we did two or three years ago is the safety aspect—Wales is seen as a safe place in which to study, which is very important, obviously, to parents of prospective international students. I think that one of the most interesting factors is around the impact of personal contacts—if you like, personal referral and repeat business—because students who've come here have had such a great experience that they go back and then they recommend it to others. Angharad may be able to tell you a bit more about that, but that's been quite a strength in terms of attracting in international students.

[162] In relation to lessons, I wouldn't say Northern Ireland, but the Republic of Ireland do this very, very well and in a variety of ways. They fund very strongly, they use a very well developed diaspora network. They have strong brands that they will put funding behind and they've been at this a really, really long time. So, you may find it very, very interesting to look at what the Republic of Ireland do. In education terms, I would say, of our near neighbours, the Republic of Ireland are probably the best example.

[163] **Russell George:** Have you got a specific example of something they're doing that we could learn from?

[164] **Ms Wilkinson:** For example, they'll look at how they will market their higher education offering. Recently, they have put hundreds of thousands behind a marketing campaign across the globe to get international students

to come to Ireland, and they will back that up. That will all be backed up by use of common branding and the diaspora and all the others sorts of things that they will draw on, because it's a very connected system.

[165] **Russell George:** And the results of that funding were fruitful.

[166] **Ms Wilkinson:** I don't know yet, but 'yes'. [*Laughter.*]

[167] **Professor Davies:** Can I just add to that? Because specific examples always resonate. When you go in market, that's when you understand in terms of competition. The ways in which universities will embrace recruiting students are various, but one of the ways would be through agents. Agents are very much aware of the incentives provided by different nations within the UK. So, for example, I was in India recently and it was very clear that the Irish Government had themselves drafted an Irish internationalisation strategy for India, and that resonated on a number of levels, through from scholarships right through to post-study visas. It was a joined-up approach. Of course, from the point of view of an agent who has an understanding of the local market, that really chimes, because you have to identify what are the financial advantages of studying in one institution in one home nation compared to another nation. That's where you see focus.

[168] **Russell George:** Thank you. Can I bring Jeremy Miles in, because we've got quite a few questions to get through? Jeremy.

[169] **Jeremy Miles:** We've heard evidence about the importance of looking at selling Wales to the world and selling individual sectors as part of a broader whole that combines all the functions, if you like, of any nation or Government—encompassing arts and culture and so forth. We've also heard about the establishment of the new international group within Welsh Government, which Universities Wales is represented on by the First Minister's office. What's your sense of the potential of that group to support the efforts of Universities Wales and the broader sector in Wales in its efforts?

[170] **Professor Davies:** I think that's very much a welcome development. I think that essentially focusing resource in one high-level group ensures that there are some joined-up elements to the whole international offering that Wales can provide. One of the main challenges in the past has been disparate funding and a lack of connectedness. What I see, in terms of that group—of course, it's only met once, it's very early days—is that there's an understanding of how the interconnected parts can present a whole offering

in terms of 'brand Wales'.

[171] What I would also say, Jeremy, as part of that process, is that of course we have different sectors, we have different offerings in different parts of Wales in terms of our activity, but those sectors also need to be cherished for what they do. So, for example, differentiation is also important. What HE can do is different from what perhaps other sectors of the economy can do. I think, so long as we don't lose the focus on the real strengths that each sector brings and how the international group can support each sector—that, I think, is key.

11:00

[172] Just one example: I recently went to China, and a major development in China was announced by one of the universities in London. It was a multimillion investment, both ways—China and also a London university—that was celebrated in a connected way in London, in this big city in China, with the LSO, the London Symphony Orchestra, in concert with a major London university. That was impressive. When you're sitting there, that's when you see the interconnectivity. I think the international group can make the connection between the strengths of different sectors, but don't mix up the sectors. It's important that we celebrate our distinctiveness, because we in the universities sector are competing against over 20,000 universities in the world and that differentiation is very important.

[173] **Jeremy Miles:** Okay. Thank you.

[174] **Ms Wilkinson:** I suppose what I'd add to that is it's not a one-way street. It's, 'What can we do for Welsh Government?' as well as what they can do for us, and universities are quite mature in terms of their interactions overseas. So, I think bringing things perhaps together in one place is quite helpful because then you don't get one action on the one hand and another on the other. An example of that might be, for example, in relation to India, where we had a cut in higher education funding for a British Council initiative in India at the same time as, overall, India is a priority for Welsh Government. Because those decisions are being taken in different places, that then causes a problem because of the way that is received in market in India, and it is visible. So, I think bringing things together in the way that Welsh Government is now starting to do and getting some real focus into that I think is going to be very, very helpful, and we've certainly seen a shift over the last 18 months to two years in terms of how that's happening. It's very positive.

[175] **Jeremy Miles:** Great. Thank you.

[176] **Russell George:** Hefin David.

[177] **Hefin David:** In a previous occupation, I've been to India on a recruitment mission. That was in 2009. The kind of job we had—we knew how many students we were going to recruit, but to get the best students in those numbers. There was no doubt that we would recruit the numbers we were targeting, no doubt at all, and all we were doing was selecting the right students for the number fit. The UK Council for International Student Affairs said this year that,

[178] 'compared with many other countries our non EU recruitment'—

[179] now, today—

[180] 'is virtually stagnant—with first year arrivals decreasing, countries like India nosediving but fortunately China keeping the totals as high as they are...this shows—and without doubt as a direct result of visa restrictions—the picture for the whole of the UK HE sector is far from rosy'.

[181] And I think you reflected that in your submission, quoting the First Minister. Whatever Wales does, aren't we, to a great extent, hamstrung by the UK Government's post-study work visa policy and the fact that they count students as part of immigration figures?

[182] **Professor Davies:** First of all, I don't recognise fully the analysis there because, if you actually look at international student trends, it's uneven across the sector. So, for example, in Russell Group universities and also in universities with higher rankings, you see, actually, an increase in the number of overseas students.

[183] **Hefin David:** But the net is down.

[184] **Professor Davies:** The net is down, but I think this is my point about differentiation. We need to understand the sector and different strengths within the sector, and how one can play to our strengths is an important part of the marketing element. To answer you directly in terms of UK Government, of course it sets the tone. That's the point about the internationalisation strategy that Ireland could announce, because it wasn't a coincidence that at

the same as we were, in the UK, restricting post-study work visas, Ireland was able to differentiate itself by providing such opportunities. What I find very unnerving is that, even within the UK, there's an uneven way in which the home nations have been treated. So, for example, Scotland has now got the benefit of its own pilot programme, and some Russell Group universities as well, which I think is not fair, as part of the way in which the UK is treating its own assets.

[185] **Hefin David:** Amanda, do you want to say anything?

[186] **Ms Wilkinson:** It would be very important, from a Wales perspective, that approaches on post-study work visas, or visas more generally, don't disadvantage Welsh universities over and above other universities because of the mix of universities that we have. That is clearly UK—. That is a matter for UK policy. I would say that we have had an awful lot of support from Welsh Government, from the First Minister and from the Cabinet Secretary, in relation to supporting us on immigration issues post Brexit in particular, and putting forward some very supportive statements that we're able to use internationally in terms of the welcome that students will receive in Wales. We know that that sort of strategy has worked in Scotland, and I think that's something that we just need to keep working on.

[187] **Hefin David:** But, Iwan Davies, you've suggested, you've implied, that, actually, Scotland have a policy advantage over Wales, and the British Council said that Scotland, and Ireland, indeed, overcome their problems by providing a welcoming environment. But it's much more than that, surely. It must be down to specific policy differences that Wales aren't party to.

[188] **Professor Davies:** Well, I think that's right. You can see it in market. Whenever you have—. There's always a strong Scottish presence, and that's underpinned by a real Scotland brand, pioneered, I think, by the Scottish Government. It's almost a joined-up, connected approach with a series of scholarships. So, for example, you've got joint initiatives between universities and the Scottish Government in providing scholarships in targeted areas. One of the clever things they do is that they sell Scotland, through higher education in particular, along key themes that they want the world, really, to associate with Scotland. So, life sciences would be one, and around the banking and financial services would be another. So, immediately, it raises the idea of Scotland as a clever, innovative nation within the UK, and that's done very deliberately.

[189] **Russell George:** Mark, did I see you indicate?

[190] **Mark Isherwood:** Yes. Just a short question: I understand it's more the norm than the exception for the countries that are the main destinations globally for international students to incorporate international students within immigration figures. Are there any examples overseas we could look at where they are nonetheless managing this in a way that removes the barriers or continues to incentivise the offer?

[191] **Ms Wilkinson:** Sorry, could you clarify that? I'm not sure I quite understood what you said.

[192] **Mark Isherwood:** I understand that a number of countries—Australia, for example, the US, and others—that are amongst the key target destinations for international students also incorporate international student figures in their immigration figures. Are there any international examples beyond the UK that you're aware of that operate that way that have found good practice models we could be looking at to overcome the barriers created?

[193] **Ms Wilkinson:** I can't say that I'm aware of that. I can certainly go away and get you an answer to that, but that's perhaps a wider question. I'm not aware—

[194] **Russell George:** Okay. If there is any information afterwards that you want to pass to us in regard to that—

[195] **Ms Wilkinson:** What you're talking about is how international student numbers are accounted for within a country's overall immigration figures. Have I got that right?

[196] **Mark Isherwood:** I understand that, when the UK took the decision to incorporate international student figures into immigration figures, they were following a pattern that is quite common internationally. Are there therefore examples internationally where good practice has been established to support and attract international students operating similar systems?

[197] **Russell George:** By all means, come back to us in writing if you want to provide any information on that.

[198] **Ms Wilkinson:** Sure, I'm happy to do that.

[199] **Russell George:** David Rowlands.

[200] **David J. Rowlands:** Can we examine the Welsh Government's offices overseas and how they promote Wales as a place to study? The view of the Cabinet Secretary suggested that much of the activity of the overseas offices is

[201] 'difficult to quantify but it is vital to the Welsh Government's achievements in those countries.'

[202] It seems to me that these offices appear to be some nefarious sort of presence there. Can you tell us what sort of experiences you have had with those offices, and whether you think they're actually doing the job that they're there to do?

[203] **Ms Thomas:** As a sector, of course, we've had engagements with a number of the overseas offices. Chongqing is an example where there has been a particular focus on Wales, and I think that office has helped progress Welsh universities' agenda in terms of developing links, not just in terms of recruitment, but also in terms of institutional links for student exchange and for research. Certainly, we do receive leads from the offices in terms of potential developments, which is very, very useful for the sector, and certainly they support aspects of not just recruitment but also the brokering of relationships in terms of consultancy work and research strategy. I'm not sure whether my colleagues would want to add their experiences.

[204] **Ms Wilkinson:** I could probably just say something collectively in terms of our experience with, perhaps more recently, working with overseas offices. Our experience has been very positive, for example, working with the US office, where we've exchanged information. We've run a very successful joint event where we've been able to bring in not only university contacts but business contacts, so we're getting that sort of collective, cross-sectorial cross interest into that office and that office activity. They've worked very constructively with us, and we are still having discussions with some of the Welsh Government US offices, Chicago in particular, where we think there are perhaps some more structured things that we could do with them. And, again, in terms of what we've been able to do in India in terms of having an inward mission from an Indian journalist, that has also been a very, very positive experience where we've been able to focus, perhaps, on one region of India. I think there is some scope for some more of those sorts of

approaches but, of course, universities will use a lot of overseas presence, will use British Council, will use UK offices, will use, indeed, in key markets, our own offices—Angharad could say something more about that. So, it's how we get virtue in the interactions we're having.

[205] **Russell George:** David, did you have more questions you want to ask on this?

[206] **David J. Rowlands:** Yes. Actually, it's with regard to the Welsh strategy, 'Prosperity for All', where they suggest that there could well be an expansion of these offices. Do you have a view on that? Do you think they ought to be expanded?

[207] **Professor Davies:** My view is that it's about the scale of the offices as well, and that we have, at any one time—. Talking about my own university, we'd have 30 or 40 people outside of the UK and interacting globally. It seems to me that one of the most important things, as Amanda said, is we can do so in country in a number of ways, through UK representation, through ambassadorial premises—we often use ambassadors' residences to host events—but also, in terms of Welsh Government in-country offices, where they have sufficient scale, they can make a very big difference in terms of developing the Welsh HE brand, and also Welsh assets. I would be cautiously supportive of such an approach, and from my own experience in terms of, let's say, in Brussels, where you really have got quite an innovative mechanism, where you've got Welsh civil servants interfacing there at a high level with the higher education in Wales as part of that process, that is, I think, an effective way of really identifying respective strengths and, potentially, if one worked through protocols of engagement where it was seen as a joint effort, we could even have a greater impact than we're currently having, as well.

11:15

[208] **David J. Rowlands:** Okay. Can I just ask a quick supplementary? Do you think there's a great disparity between one office and another, depending on which country? Do you find that there is a great deal of difference? And is this related to the size of those offices?

[209] **Professor Davies:** Well, very clearly—very clearly that is the case. For example, if you go to China, you have different-sized offices in different cities. There's only so much that you can do, depending on the manpower

that you have on the ground. So, I think the question there would be, ‘How do you network the Welsh presence within a particular market?’ So, I’m not saying that you have to have a physical presence, but a virtual presence in-country that can represent itself is also very important.

[210] **David J. Rowlands:** Thank you very much.

[211] **Jeremy Miles:** That takes me on to the question I was going to ask, and it’s a slightly different aspect to it. We heard, when we were in Brussels last week, obviously the value of geographic distribution, if you like, in terms of global footprint and the countries, the markets that it’s useful to be in, but we also heard that, I suppose, in terms of futureproofing overseas effort and strategy, accessing networks was as important—and, perhaps, arguably in future, would become more important—than the geographic distribution. Now, obviously, universities are incredibly networked in terms of staff, alumni and so forth, so we probably understand those aspects, but do you have any observations about, obviously in-market networks, but I suppose trans-market networks and what the potential is of some of those—and I don’t just mean having a website, which we discussed in the previous session; I think it’s about more than that, really, but I would welcome your reflections on that and the potential of that.

[212] **Professor Davies:** I think that, in terms of networks, the concept of a curtilage now in terms of defining a physical estate is just redundant. And essentially, when we are looking at building up world-class university offering, very often the question is, ‘What network do you occupy?’ So, you bring to a collaboration not simply the physical curtilage that you presently occupy, but actually you bring to it your connections. And one of the exciting things for me in terms of Wales, and particularly the devolution settlement, is that we’ve created a system, and what I would like to see is the extent to which the Welsh higher education system can collaborate with other systems worldwide, and that provides incredible economies of communication and understanding, through mutual recognition of qualifications and various support mechanisms. You’re then creating, potentially, a world-class network of systems that can speak to each other in a way that you couldn’t do, for example, if we were dealing with this on a UK level. And that’s—

[213] **Jeremy Miles:** Could you explain why that would be different?

[214] **Professor Davies:** Okay. We started the session, really, by talking about the topography of Welsh higher education, and I made the point that we

shouldn't be confusing different sectors. And what I would say here is that, in the context of Welsh HE, you have a very defined product, in commodification terms. In England, that definition is so much more difficult to really articulate. So, we can have this international collaborative group because there's homogeneity, or there's an understanding of the strengths and weaknesses of a particular sector in a way that you could not possibly have in England.

[215] **Ms Wilkinson:** Sorry, Iwan, I'm interrupting you, but to take one of the, perhaps, longer burn issues we're looking at in relation to our Global Wales initiative, if we were to look at Vietnam, for example, we've got a good offering in terms of a quality system, in terms of a governance system, there's a role in relation to what the funding council could bring to that relationship, and we've got a country that would value a more system-to-system, government to government-type approach, as well as the offering we can bring, and then potentially bringing in colleagues from FE and elsewhere in terms of building perhaps what is a longer term proposition for universities.

[216] **Ms Thomas:** Could I go back to your question about networks? You mentioned the power of alumni, and I'd like to comment on that, in the sense that Welsh universities probably have around 10,000 international students graduating every year. It could be somewhere between 10,000 and 15,000. And the British Government has actually recognised the power of alumni, and certainly, certain schemes, such as the Chevening Scholarship Scheme, as soft power, and actually building bridges, building networks of decision makers, of influencers in the future. And there is such goodwill towards Wales amongst the alumni. Alumni generally have such a good experience in Wales, and so many of our alumni as well are—. When I speak to students, they've been placed in Wales, they've been placed at the Welsh universities, because the intention is for them to go back and work for their families' business or whatever it is. But I think it opens up networks across many sectors, our alumni, because it's not just in the education sector, it could be across all manner of sectors, which could be capitalised upon. And certainly, there are many alumni who've been in Wales, who are in very influential positions, or have been in influential positions, whether it's within Government, or whether it's in ministries of education, which, actually, in itself, helps promote relationships and develop future links.

[217] So, I think there's a piece there on which I think the Welsh Government and the Welsh universities could work for mutual benefit, and something that

Welsh universities can benefit Welsh universities, in the sense that we can offer our alumni support once they have returned in-country, possibly in terms of developing businesses. So, I think there's a lot of potential there.

[218] **Professor Davies:** Can I just build on that because alumni, of course, are critical, and we can come back to that, but also honorary fellowships as well? Because one of the things that universities do is they, of course, connect with former students. They really understand what is happening in particular areas of the world. They want to celebrate scholarships, they want to celebrate political achievement, and the international body of honorary fellows amongst the Welsh universities is something that is very significant indeed. And there you've got ambassadors within country who associate themselves and universities in a very spectacular way. And, of course, we are doing something similar on Saturday.

[219] **Jeremy Miles:** Indeed.

[220] **Professor Davies:** But that, in itself, I think indicates, not power, but really an attraction, which very few national assets have, other than universities—something about universities that people connect with.

[221] **Jeremy Miles:** Can I just—. Sorry, Amanda—.

[222] **Ms Wilkinson:** I was just going to add to that that Australia has a sort of alumni engagement strategy, if you like. It's sort of part of their public diplomacy initiative, if that's a good way of putting it. That is something that we can do. We can do that here in Wales.

[223] **Jeremy Miles:** Can I just take us finally, then, on to the question of Global Wales? If you look at what might be the obstacles in the path of doing what you would like to do through Global Wales, what would you describe them as being? If there are any; you might not feel there are any.

[224] **Professor Davies:** I think that Global Wales is probably one of the best developments in recent years. What I would say, which is the point about the international committee, is that we need to have a system where the funding is smooth. In other words, it's not dependent upon offerings in different pots of Welsh Government. So, I think we probably need to review where the funding comes from, so that the sources are not, as it were, salami-sliced from different budgets. So, there needs to be a real focus on an international budget, with, of course, outcomes, for which people are accountable. I would

also say that the precedence in Scotland, in terms of the way in which the focus is provided across the kind of similar bodies that make up Global Wales—. We didn't invent Global Wales. We looked at best practice elsewhere and we imported that best practice by bringing together the investment arm of Welsh Government, the education arm of Welsh Government, the British Council, the funding council for Wales, the tourism element, the universities in Wales. You've got a very powerful group, but I would say that cohesion, really, of funding from different sources cries out for reform.

[225] **Jeremy Miles:** Would you say that it would help your efforts if there was greater political focus in the work of the Chamber, for example, on this kind of joined-up approach to different outward-facing activities that the Government and the public sector more broadly undertake? Would it be of benefit?

[226] **Russell George:** Do you want to answer that point?

[227] **Ms Wilkinson:** Go ahead, Iwan.

[228] **Professor Davies:** Without doubt. I think the appreciation, within Government and within the Assembly, of what universities are doing within the country—. You have here a huge export industry that has a number of elements to it, ranging from high-level collaborative research with stellar institutions worldwide through to student mobility provision of a short kind. To have Texan students who would not otherwise leave Texas, let alone the United States, coming on a week or two weeks' placement in Swansea is transformative for them, and it's a way in which we can communicate.

[229] **Russell George:** Did you have more questions, Jeremy? No. Vikki Howells.

[230] **Vikki Howells:** Thank you, Chair. In your evidence, Universities Wales said that universities had a role in attracting large international events to Wales, in terms of sponsoring, hosting or just supporting. Do you think this is an area that could and should be developed further?

[231] **Ms Wilkinson:** There are others here who could give more specific examples, but the answer to that would be 'yes'. The market for academic conferences, just for a start, is very, very large—I'm in danger of being a bit flippant, but academics love a conference. So, the answer to that would be, absolutely, 'yes'. Iwan could say more about the impact, for example, of

attracting a science festival to Swansea and the impact that that's had. In doing so, of course you get the great benefit from running an event but it's what else you can do with that event. Who are you bringing? It comes back to this issue about thinking very cleverly about how you're using the people that you're bringing in in a variety of different ways.

[232] **Professor Davies:** I mean, the lasting impact of the British Science Festival in Swansea was such that we couldn't contain it to a year. We've now institutionalised that on a yearly basis because it had such a local impact, let alone a global impact. That's the real value of these conferences. It's not so much what you can do collaboratively internationally, but the impact it has upon your own university and its own momentum and its own understanding of its place in the world, because it is a world stage that we are competing on.

[233] I think that that's something that is not unique to universities, but it's something that's at the forefront of our minds. We look not necessarily to our colleagues within Wales for competition. We look to the big trends elsewhere in the world. One piece of work that I'm currently looking at at the moment are the rising universities in 2030. The rising universities who will come to fruition in 2030 are not the usual suspects. The ability of universities to actually essentially develop strategies that can accommodate these new trends is what will make the Welsh HE system and universities in Wales resilient and successful in the future. Conferences are part of that without a doubt.

[234] **Russell George:** Did you have any further questions, Vikki?

[235] **Vikki Howells:** Yes, just a supplementary to that, as a bit of an aside. We took some evidence this morning from stakeholders—ColegauCymru and the British Council—who agreed with what you've said there. But in a previous evidence session, we've taken evidence from the tourism sector who've expressed some concerns that very large events such as this can have a detrimental effect on day-to-day indigenous tourism. I was just wondering if you had any experience of that, and whether those fears are indeed founded, in your opinion.

11:30

[236] **Professor Davies:** The answer is 'no', and I would say that for these reasons: firstly, when we host international conferences, we use our own

residences and we use our own facilities, and in that sense, that doesn't impact upon, let's say, bed occupancy in hotels unduly. But also, I think it's rather strange to prefer the former view, because essentially this is about building the awareness of Wales internationally, and as part of that process, one of the things that we find ourselves doing now is when we greet international students, let's say, at the beginning of an academic session, we do so including their parents. So, international students now bring their parents to the weekends of induction, and we have to build a programme for them. These are academic tourists, and they continue to be academic tourists and, indeed, 7 per cent of the tourism in Wales is actually linked with universities, but let's not close up any walls. Let's bring people to Wales; that's what we're about.

[237] **Ms Wilkinson:** I would absolutely agree with that. There are things that we could think about; how do we work with Visit Wales? If we can get X per cent of parental visits up—increase them by whatever per cent—to key locations in Wales, if we could work with Visit Wales to do that, how do we incentivise some of that? I think there are some really interesting things that we could think about in terms of just getting what you might call that sort of core tourism offering up, by developing an offer that we can then sell out, through the things we're doing with applicants, with students that come, and so on.

[238] **Russell George:** We've got a couple of other areas that we want to cover, so it might be that just one of the panel members will answer a question, just so we can get through all the questions. Mark Isherwood.

[239] **Mark Isherwood:** Thank you. I feel I should declare that three of my children are Welsh university graduates, and the fourth is currently a Bangor undergraduate, just to get that on the record. We know, from previous evidence we've received in this, and, I think, other committees, that a number of non-EU member states have access to some EU programmes like Erasmus, like Horizon 2020, whether that's in the European Economic Area, the European free trade area or beyond. Of course, we don't know what programmes UK and Wales will have access to on the final exit agreement the UK concludes. From what we do know currently, to what extent do you believe the Welsh Government will need to change its approach to selling Wales, in terms of education and skills, internationally after we leave the EU?

[240] **Russell George:** Who would like to take that one? Angharad.

[241] **Ms Thomas:** Certainly, Brexit presents a huge challenge in terms of the schemes, as you've mentioned—the Erasmus+ scheme and Horizon 2020, and what is going to happen post Brexit. It's in terms of the valuable networks that exist between universities and universities in the European Union and further afield. I think there is a need for parallel schemes, either if Wales and the UK can continue to participate in Erasmus+ for example, and in other funding schemes—. Either continuing or having parallel schemes, I think, is absolutely crucial, because these networks provide such valuable communication in terms of the research work that's undertaken, and the links with industry in the European Union and further afield. So, I think that that message is loud and clear, and I think the sector, certainly, is concerned about that aspect at the moment. So, in terms of—

[242] **Russell George:** Amanda, did you want to come in? I think you wanted to come in.

[243] **Ms Wilkinson:** We've spoken a lot about communication connectivity, and of course, the key to that connectivity is around students and staff. Those have been core priorities for the university sector post Brexit, and they remain core considerations. We absolutely have to have a situation where international staff want to work here and want to work in Wales and continue to do so, and that is very important in relation to the networks that we develop across Europe. We will need to think much more carefully about, for example, potentially, how we use some of those networks we might take for granted at the moment. So, we talked about alumni. Do we need to start thinking about our Erasmus students? What networks are we connecting with our Erasmus students? Because we're going to need to act much more proactively, potentially, in some of our key European markets. It is very important to the university sector that we remain in future framework arrangements and we would like to remain within Erasmus+ arrangements. There are a variety of examples as to how that's done, including, for example, Quebec, who also participate as a region of Canada. So, I think we need to be very open to how we might do that from a Wales perspective.

[244] **Russell George:** Okay. Thanks, Amanda. Mark, do you have any further questions?

[245] **Mark Isherwood:** Unless you've got something you wanted to say—

[246] **Russell George:** Just briefly, because I've got to get time for Adam Price as well.

[247] **Professor Davies:** My observation would be that we must continue to look outward and that it would be unfortunate for us as a sector simply to look to London as a mechanism for funding. We act internationally, and I think there's a danger that we don't embrace the world by retreating into simply a UK view of the world.

[248] **Ms Wilkinson:** Some feedback that we're getting is that Scotland are looking at setting up international research and innovation offices. You've got to think about the scale of the investment that's going in. They're looking at Dublin, they're looking at Berlin, they're looking at Brussels and they're looking at research and innovation. There's this absolute driven effort in terms of what we need for the future, what sort of economy we think we're going to have and the investments that need to go in alongside university activity. So, we need to look at what the competition's doing here, because they're moving really quickly.

[249] **Russell George:** Thank you, Amanda. Adam Price.

[250] **Adam Price:** Jest i barhau ar y nodyn hwnnw, rwyf jest eisiau cloi drwy ofyn i chi am unrhyw wersi mae Cymru yn gallu eu dysgu oddi wrth wledydd bychain eraill, o ran y gwaith maent yn ei wneud o ran hyrwyddo. Roeddech chi, Amdana Wilkinson, wedi sôn am Weriniaeth Iwerddon, ond hoffwn yn benodol ofyn am y rôl bosibl y gall cronfeydd ysgoloriaeth ar gyfer myfyrwyr tramor ei chwarae fel rhan o becyn o weithrediadau hyrwyddo.

Adam Price: Just to continue on that note, I just want to conclude by asking you about any lessons that Wales can learn from other small countries, in terms of the work that they're undertaking in terms of promotion. You, Amanda Wilkinson, referred to the Republic of Ireland, but I would specifically like to ask about the possible role that scholarship funds for students from abroad could play as part of a package of activities in terms of promotion.

[251] **Yr Athro Davies:** Byddwn i'n dweud, wrth gwrs, bod ysgoloriaethau yn hanfodol, oblegid maent yn codi brand y wlad. Wrth gwrs, mae'n rhaid bod yn fwy sbesifig am natur yr ysgoloriaethau yma. I ddechrau, mae yna

Professor Davies: I would say, of course, that scholarships are essential, because they raise the brand of the country. Of course, we have to be more specific about the nature of these scholarships. To begin with, there are scholarships

ysgoloriaethau sy'n ymwneud â sicrhau bod yna gyfleoedd i fyfyrwyr efallai o wledydd gwahanol—gwledydd efallai y byddai Cymru'n moyn partneru gyda nhw o safbwynt lles ac o safbwynt tyfu'r economi, er enghraifft gwledydd yn Affrica. Ac hefyd mae ysgoloriaethau sy'n ymwneud ag ysgolheictod o'r radd flaenaf. Mae'n rhaid imi ddweud, Adam, mai un o'r pethau sydd wedi codi fy nghalon i yw'r strategaeth, er enghraifft—sydd ddim cweit ar y pwynt yr ydych yn ei wneud, ond dylid gwneud y pwynt ta beth—sef bod proses Sêr Cymru wedi bod yn broses wych ac yn ymarfer da bydeang. Ond, o safbwynt ysgoloriaethau, mae yna ddigon o *precedents*, er enghraifft, gyda'r Alban. Mae rhywbeth fel yna yn eithaf rhwydd. Er enghraifft, maent yn defnyddio £2,000 y mae'r Llywodraeth yn ei rhoi er mwyn talu hanner ffioedd myfyrwyr sy'n dod mewn i wahanol raglenni ôl-raddedig yn yr Alban. Byddwn i'n dweud hefyd bod eisiau dod yn ôl i'r syniad yma o system i system, achos dyna beth mae'r Albanwyr yn ei wneud. Byddwn i'n dweud hefyd o safbwynt Ewrop bod yna systemau tu fewn i Ewrop hefyd, er enghraifft gyda phobl o Fflandrys. Mae yna wrthyferbyniad, ond mae yna hefyd ffyrdd o bartneriaethu ar sail ein hunaniaeth fel system addysg uwch, a dyna'r pwyslais liciwn i ei wneud heddiw. Fel prifysgolion, rydym yn rhan o'r system yna, a hynny sy'n dod â ni at ein gilydd, a hefyd rydym yn gallu

that relate to ensuring that there are opportunities for students from different countries—countries that perhaps Wales would like to partner with in terms of well-being and in terms of growing the economy, for example countries in Africa. And there are scholarships that relate to learning of the highest degree. I have to say, Adam, that one of the things that have heartened me is the strategy, for example—this is perhaps not on the point that you've made, but, nevertheless, we should make this point—namely that the Sêr Cymru process has been an excellent process and world leading in terms of good practice. But, in terms of scholarships, there are plenty of precedents, for example, in Scotland. Something like that is quite easy. For example, they use the £2,000 that the Government has given to pay for half of the fees of the students who are on different postgraduate programmes in Scotland. I would also say that we need to come back to this idea of system to system, because that is what they're doing in Scotland. I would also say in terms of Europe that there are systems within Europe also, for example, with people from Flanders. There are contrasts, but there are also ways of partnering on the basis of our identity as a higher education system, and that is what I'd like to emphasise today. As universities, we are part of that system, and it is that that brings us together, and also we can compete as individual

cystadlu fel prifysgolion arbennig universities. Do you want to come in
hefyd. Wyt ti'n moyn dweud rhywbeth on this?
yn fanna hefyd?

[252] **Ms Thomas:** Ie, diolch. Buaswn **Ms Thomas:** Yes, thank you. I would
i'n licio ychwanegu gwneud defnydd like to add the strategic use of such
strategol o ysgoloriaethau o'r math scholarships, as Iwan has said, where
lle, fel mae Iwan wedi ei ddweud, there's a specific purpose for them.
mae yna bwrpas penodol iddynt. Eto, Again, another strategic aim would
amcan strategol arall fuasai'n medru be asking 'Well, what are the
bod ydy 'Wel, beth ydy economic priorities of Wales?' and
blaenoriaethau economaidd Cymru?' linking those scholarships and
a chysylltu'r ysgoloriaethau hynny a attracting the best talent in terms of
denu'r talent gorau o ran unigolion a the individuals who could contribute
fyddai'n medru cyfrannu tuag at to the country's economy in future.
economi'r wlad yn y dyfodol. Felly, So, I think that would be the only
rwy'n credu mai dyna'r unig beth other thing that I would like to add to
arall yr hoffwn i ychwanegu at hynny. that.

[253] **Russell George:** If I could ask each of you to perhaps give your top
priority with regards to what you might want to see in our report, and what
you might like to see as a recommendation from our committee to the
Government, what would that top priority be, briefly?

[254] **Professor Davies:** I think it's connectedness across the activities of
Government, supporting a deep understanding of the work that's currently
being undertaken by our sector—of course, there are other sectors—and
being smart in the way of understanding what our sector needs to do to
remain competitive, and the support that the Welsh Government can provide
us in that task, because it's a big world out there and, essentially, when
we're looking at the growth—. Higher education is one of the highest growth
industries in the world and we will only compete if we remain competitive.
We've got a unique opportunity to do that because our system and the
understanding of the system is one that this country can really flourish and
understand.

[255] **Russell George:** Amanda.

[256] **Ms Wilkinson:** I'm afraid I just completely agree. It's about
connectedness on all those levels that we've just described. Welsh
Government absolutely needs to be able to feed off all of that. We're creating

a whole, because funding constraints will always be there. So, it's how we mutually support each other to create actually something that allows us to effectively leapfrog where we might otherwise be.

[257] **Russell George:** And how do you think we could do that?

[258] **Ms Wilkinson:** Global Wales is a great example of how we can do that. Where have we got contacts that are helpful to support priorities elsewhere? Have we got a company that's got great contacts in a market that we're interested in? It's how you bring those things together and really exploit them, because we have to do that well. It's about connectedness and communication, absolutely.

[259] **Russell George:** Angharad, any final points from yourself?

[260] **Ms Thomas:** I absolutely agree. I think it's having that interconnectedness, because I think universities have so many experts, so many contacts overseas—are we making the most of those universities? How can we contribute to the Welsh Government's agenda and having that joined-up strategy for the future?

[261] **Russell George:** Can I thank you very much for your time this morning? I'm sorry that sometimes we had to move on to other questions quicker than you would have liked, but it's a difficult balance to give everyone an equal amount of time on the committee. So, thank you very much for your time this morning. We're very grateful.

11:44

**Memorandwm Cydsyniad Deddfwriaethol: Y Bil Seilwaith Telathrebu
(Rhyddhad Rhag Ardrethi Annomestig)
Legislative Consent Memorandum: Telecommunications Infrastructure
(Relief from Non-Domestic Rates) Bill**

[262] **Russell George:** Can I move to item 6 with regard to the legislative consent memorandum on telecommunications infrastructure? There is some legal advice being provided to the committee that indicates that there's nothing controversial or anything that our committee needs to examine in any more detail. Are there any Members who want to comment on this item? In that case, it's noted that Members are content.

[263] And that brings our meeting today to a close—oh, there are papers to note.

Papurau i'w Nodi
Papers to Note

[264] **Russell George:** Item 4, sorry. Papers to note. Are Members happy with the papers to note? There we are. Great. Thank you. We'll close the meeting.

Daeth y cyfarfod i ben am 11:45.
The meeting ended at 11:45.