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Annwyl Lynne,

Ysgrifennaf i ymateb i adroddiad y Pwyllgor, "Graddau Gwahanu?", a gyhoeddwyd ar ôl i'r Pwyllgor Plant, Pobl Ifanc ac Addysg ymchwilio i effaith Brexit ar addysg uwch ac addysg bellach.

Atodir fy ymateb llawn i'r 12 argymhelliad yn atodiad A ac rwy'n falch fy mod i'n gallu derbyn pob un o'r 12 argymhelliad yn llawn, yn rhannol neu o ran egwyddor.

Mae natur ac effeithiau Brexit yn newid ac maent yn ansicr o ran natur. Felly, mae'r ffocws y mae'r Pwyllgor wedi'i roi i'r effeithiau posibl ar addysg uwch ac addysg bellach yn cael ei groesawu gan Lywodraeth Cymru. Fel rydych chi'n nodi yng nghasgliad 2, "byddai sefyllfa lle nad oes cytundeb yn dal i aflonyddu'n sylweddol ar y ddau sector". Fel llywodraeth gyfrifol ac o ystyried y tebygolrwydd uwch o adael heb gytundeb, rydyn ni'n gwneud yr hyn a allwn i helpu ein holl bartneriaid i baratoi. Mae hynny'n cynnwys ein hysgolion, ein colegau a'n prifysgolion sy'n elwa ar fod yn aelod o'r UE. Mae gwaith Llywodraeth Cymru ar gynlluniau wrth gefn ar gyfer gadael heb gytundeb wedi dwysau eto wrth iddi ddod yn fwyfwy amlwg bod Llywodraeth y DU wedi methu dod i gytundeb derbyniol.

Mae Llywodraeth Cymru yn dal wedi ymrwymo i gefnogi'r sector addysg uwch a'r sector addysg bellach wrth iddynt baratoi ar gyfer Brexit oherwydd ein bod ni'n cydnabod eu cyfraniad sylweddol o ran yr economi, cyfiawnder cymdeithasol, gwasanaethau cyhoeddus a diwylliant yng Nghymru. Rydyn ni wedi bod yn glir iawn ein bod ni'n parhau i groesawu pobl o'r UE sy'n gweithio neu'n astudio yng Nghymru.

Yn gywir

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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.

Argymhellion Adroddiad y Pwyllgor Plant, Pobl Ifanc ac Addysg

Graddau Gwahanu? Effaith Brexit ar Addysg Uwch ac Addysg Bellach

Argymhelliad 1

Dylai Llywodraeth Cymru fynd ati'n rhagweithiol, drwy gyfrwng unrhyw Fil Mewnfudo a fydd gan y DU yn y dyfodol, i fynnu pwerau gweithredol ar gyfer Gweinidogion Cymru fel bod modd iddynt bennu rheolau mewnfudo o strwythur gwahanol, yn benodol ar gyfer myfyrwyr a staff academiaidd yng Nghymru. Nid yw Michelle Brown AC yn cytuno â'r argymhelliad hwn.

Cytuno mewn egwyddor.

Mae Llywodraeth Cymru yn cytuno bod angen system addysg uwch yng Nghymru sy'n caniatáu i sefydliadau barhau i gydweithredu'n rhydd a gweithio gyda'i gilydd ledled Ewrop a thros y byd. System sy'n galluogi ein myfyrwyr i deithio ac astudio mewn gwledydd eraill gan sicrhau bod Cymru yn parhau i fod yn lle sy'n croesawu pobl dramor a ddaw yma i ddysgu ac i weithio. Rhaid i'r cydweithio hwn barhau a byddwn ni'n gweithio gyda phrifysgolion i wneud yn siŵr bod y pontydd hyn yn cael eu cynnal a'u cryfhau yn y blynyddoedd i ddod.

Mae Llywodraeth y DU wedi ymrwymo i raglen ymgysylltu 12 mis ar eu papur gwyn ar y system mudo - "The UK's future skills-based immigration system". Mae Llywodraeth Cymru yn edrych ar y canlyniadau tebygol a'r effeithiau economaidd o gyflwyno'r newidiadau arfaethedig i Gymru a byddwn yn cyflwyno ein tystiolaeth ein hunain ar ofynion y farchnad lafur yng Nghymru, gan gynnwys y trothwy priodol o ran cyflogau. Ein nod yw sicrhau nad yw economi Cymru yn cael ei heffeithio'n andwyol gan system mudo gyfyngol a bod Prifysgolion Cymru yn gallu bodloni eu hanghenion at y dyfodol o ran niferoedd staffio a myfyrwyr.

Gan ystyried pwysigrwydd dinasyddion yr UE o ran ein ffyniant economaidd, yn ogystal â'r cysylltiadau rhwng mudo a'n cyfrifoldebau datganoledig ar gyfer gwasanaethau cyhoeddus fel addysg, addysg uwch, iechyd a llywodraeth leol, rydyn ni wedi ceisio cael sicrwydd gan Lywodraeth y DU y byddwn ni'n cael cyfle i rannu ein safbwyntiau â nhw ac y byddant yn cael eu hystyried cyn i Lywodraeth y DU lunio ei pholisi mudo yn y dyfodol.

Mae'n siomedig nad yw Llywodraeth y DU wedi gallu gwneud hynny.

Argymhelliad 2

Rhaid i Lywodraeth Cymru gomisiynu prosiect ymchwil i bennu beth sy'n cymell myfyrwyr o'r UE a myfyrwyr rhyngwladol eraill i ddod i Gymru i astudio, gan adrodd yn ôl yn ystod y 6 mis nesaf. Dylai'r ymchwil hwn ystyried yr effaith y bydd dileu'r

grant ffioedd dysgu yn ei chael ar recriwtio myfyrwyr o'r UE. Yn ogystal, dylai ddatblygu ystod o gynigion er mwyn helpu prifysgolion i ddenu myfyrwyr rhyngwladol i astudio yng Nghymru, gan gynnwys gwerthusiad o gymhellion ariannol.

Derbyn mewn egwyddor.

Gall Llywodraeth Cymru helpu i hyrwyddo Cymru a safonau ac ansawdd uchel ein prifysgolion, gan weithio gyda Phrifysgolion Cymru, Cyngor Prydeinig Cymru, Croeso Cymru a phartneriaid eraill i gefnogi'r brand "Study in Wales" a helpu i ddenu myfyrwyr o'r UE a myfyrwyr rhyngwladol eraill i astudio yng Nghymru. Er mwyn cefnogi'r gwaith hwn, rydyn ni hefyd yn darparu cyllid gan y rhaglen Cymru Fyd-eang a Cymru Fyd-eang II.

Fel cyrff annibynnol ac ymreolaethol, mater ar gyfer y prifysgolion eu hunain yw recriwtio. Felly, byddwn yn disgwyl i'r sector ddeall ei farchnadoedd a gwneud gwaith ymchwil er mwyn deall disgwyliadau myfyrwyr yn ogystal â bod yn ymwybodol o werth cymhellion. Yn wir, cyhoeddodd Universities UK y papur "[A 'No Deal' BREXIT: Implications for universities and minimising risk](#)" ym mis Rhagfyr 2018. Mae'r papur hwn yn amlinellu'r camau y mae angen i Lywodraeth y DU eu cymryd i liniaru'r risgiau sy'n deillio o gael Brexit heb gytundeb a'r gweithredoedd lliniarol y dylai'r prifysgolion eu hystyried.

Mae Llywodraeth Cymru yn cydnabod y bydd y sector Addysg Uwch yn parhau i wynebu heriau yn 2019-20, sy'n cael eu dwysau gan yr ansicrwydd parhaus sy'n ymwneud â'r DU yn gadael yr UE. Felly, rwy'n disgwyl y bydd Cyngor Cyllido Addysg Uwch Cymru (CCAUC) yn helpu i roi rhywfaint o sicrwydd bod y sector yn barod i adael yr UE a'u bod yn gallu helpu'r Llywodraeth i ddatblygu presenoldeb Cymru yn Ewrop ac yng ngweddill y byd.

Argymhelliad 3

Rhaid i Lywodraeth Cymru gyhoeddi gwerthusiad o'r rhaglen Cymru Fyd-eang I. Wrth ymateb i'r adroddiad hwn, rhaid i'r Llywodraeth ddangos sut mae unrhyw wersi a ddysgwyd wedi cael eu trosglwyddo i'r rhaglen newydd, Cymru Fyd-eang II.

Derbyn

Mae'n un o amodau'r cyllid bod y prosiectau a'r rhaglenni y mae'n eu cefnogi'n cael eu gwerthuso. Cafodd Llywodraeth Cymru Adroddiadau Blynyddol ar effeithiolrwydd y rhaglen Cymru Fyd-eang I ac ar effeithiolrwydd yr ymyriadau wrth ddatblygu cysylltiadau rhwng Sefydliadau Addysg Uwch Cymru a chyfatebwyr ledled y byd, a hynny fel rhan o'r Cytundeb Grant gydag Universities UK International. Mae'r adroddiadau wedi'u hatodi yn Atodiad B.

Roedd Cymru Fyd-eang I yn rhaglen llawer llai na'r rhaglen Cymru Fyd-eang II ac roedd yn canolbwyntio ar ddod o hyd i farchnadoedd blaenoriaeth a defnyddio cynadleddau Byd-eang i hyrwyddo Cymru fel cyrchfan i fyfyrwyr rhyngwladol ddewis astudio yma. Roedd hi'n gwneud hynny drwy hyrwyddo'r brand Study in Wales. Mae Cymru Fyd-eang II yn ceisio ehangu'r gweithgareddau a gafodd eu cyflawni drwy'r rhaglen flaenorol. Bydd hyn yn golygu cysylltu mwy â'r gwledydd blaenoriaeth sydd wedi'u nodi (UDA a Vietnam), gan nodi rhagor o farchnadoedd blaenoriaeth ac ehangu gweithgareddau fel datblygu rhaglenni ysgoloriaeth gyda'r gwledydd hynny. Bydd hefyd yn cynnwys adnewyddu'r brand Study in Wales a hyrwyddo hwnnw yn ehangach, gan gynnwys yn Ewrop ac mewn marchnadoedd mewnol yn y DU.

Argymhelliad 4

Rhaid i Lywodraeth Cymru sicrhau bod gwefan Study in Wales a'r deunydd marchnata, sy'n rhan o'r rhaglen Cymru Fyd-eang, yn cael eu diweddaru a'u hadnewyddu ar unwaith, yn bennaf i gynnwys gwybodaeth am y cyllid sy'n cael ei sicrhau i fyfyrwyr o'r UE yn 2019/20.

Derbyn

Bydd Llywodraeth Cymru yn sefydlu is-grŵp marchnata Cymru Fyd-eang i adolygu'r brand Study in Wales, y wefan a chynnwys a deunyddiau marchnata yn y dyfodol. Bydd yr is-grŵp yn ystyried unioni'r brand Study in Wales yn well â brand y genedl 'Cymru Wales', yn ogystal ag ystyried y cyfle i fabwysiadu dull mwy unedig o hyrwyddo Cymru i'r byd.

Mae'r brand hynod lwyddiannus Cymru Wales eisoes wedi cael ei ddefnyddio wrth hyrwyddo Cymru o ran twristiaeth, masnach a buddsoddi, bwyd a diod ynghyd ag ymgyrchoedd recriwtio nyrsys a meddygon teulu. Y cam nesaf wrth ddatblygu'r brand Cymru Wales fydd darparu'r prosiect Porth Digidol a sicrhau rhagor o effaith ac integriad digidol. Bydd y prosiect hwn yn cynnwys lansio cyfres o lwyfannau gwe newydd ar gyfer Cymru yn 2019 (yn bennaf ar cymru.com), a bydd yn seiliedig ar ddull marchnata cynnwys sy'n flaenllaw yn y farchnad. Bydd yn canolbwyntio ar ymgysylltu straeon am Gymru sydd wedi'u hanelu at gynulleidfaoedd byd-eang. Bydd is-grŵp marchnata Cymru Fyd-eang yn ystyried cyfleoedd i unioni prosiect Porth Digidol Cymru â gwefan Study in Wales a buddsoddiadau mewn marchnata cynnwys yn y dyfodol.

Argymhelliad 5

Rhaid i Lywodraeth Cymru, fel rhan o'i hymateb i'r adroddiad hwn, egluro sut y mae'n sicrhau bod rhaglen Cymru Fyd-eang II yn cynnig manteision a chefnogaeth amlwg i'r prifysgolion hynny yng Nghymru sydd wedi gweld gostyngiad yn y galw gan fyfyrwyr o'r UE.

Derbyn

Mae'r rhaglen Cymru Fyd-eang II yn gwerthuso'r gweithgareddau y mae'n eu cefnogi, a hynny drwy system sy'n rhan o'i dyluniad. Un ffocws amlwg yw ehangu'r brand Study in Wales i Ewrop er mwyn hyrwyddo Cymru fel cyrchfan astudio. Y nod yw cefnogi'r holl Sefydliadau Addysg Uwch yng Nghymru er mwyn parhau i ddenu myfyrwyr Ewropeaidd mewn sefyllfa ar ôl Brexit ac edrych ar farchnadoedd anghyfarwydd fel Vietnam a chanolbarth gorllewin yr Unol Daleithiau.

Argymhelliad 6 Dylai Llywodraeth Cymru, fel rhan o'i hymateb i'r adroddiad hwn, ddarparu gwybodaeth yng nghyswllt yr effaith ddisgwyliedig ar y rhaglen Cymru Fyd-eang II, gan gynnwys nifer y myfyrwyr disgwyliedig a manteision mesuradwy eraill.

Derbyn

Mae Cyngor Cyllido Addysg Uwch Cymru yn gyfrifol am fonitro cyflawniad y prosiect Cymru Fyd-eang II, gan adrodd i Lywodraeth Cymru ar y gwariant, yr allbynnau a'r canlyniadau, fel y nodir yng nghynnig y Prosiect. Mae gofyn iddo ddarparu adroddiadau blynyddol ar sail academiaidd a phedwar diweddariad naratif interim ar y cynnydd sydd wedi'i wneud tuag at y canlyniadau y cytunwyd arnynt a gweithgareddau'r prosiect. Mae hyn yn cynnwys cynyddu cyfran Cymru o'r farchnad yng nghyswllt y myfyrwyr o'r UE a'r myfyrwyr rhyngwladol y mae'r DU yn eu recriwtio. Hefyd, mae Llywodraeth Cymru wedi gosod targed i ddyblu nifer y myfyrwyr o Gymru sy'n symud tuag allan yn ystod y tymor hwn yn y Cynulliad. Bydd Cymru Fyd-eang yn rhan o'r gwaith hwnnw hefyd.

Argymhelliad 7

Rhaid i Lywodraeth Cymru weithio gyda'r sector addysg uwch a'r sector addysg bellach i osod a phrofi trefniadau cyllido a fydd yn sicrhau na fydd myfyrwyr ERASMUS+ yn wynebu unrhyw ansicrwydd neu amhariad ariannol, yn enwedig y rheini sy'n dilyn graddau ieithoedd modern, gan ystyried yr amodau sydd wedi'u hatodi i warantiad y Trysorlys ar hyn o bryd. Rhaid i Lywodraeth Cymru adrodd yn ôl i'r Pwyllgor ar ôl cwblhau hynny.

Derbyn mewn egwyddor.

Yn amlwg, nid yw'r ansicrwydd parhaus sy'n ymwneud â dull Llywodraeth y DU o ran Brexit yn ddelfrydol ac mae'r ansicrwydd hwnnw'n lledu i sefyllfa ariannol a chyllid Erasmus+. Caiff cyfraniad ariannol y DU i'r UE ei ddal gan Drysorlys ei Mawrhydi, nid gan Lywodraeth Cymru. Er mwyn gallu darparu cynllun yn lle Erasmus heb gael gwared â rhaglenni gweithgareddau eraill, byddai angen i'r cyllid hwnnw gael ei drosglwyddo i ni gan Drysorlys ei Mawrhydi. Mae Llywodraeth Cymru wedi bod yn glir ynghylch yr angen am addasiad Grant Bloc i dalu am y cyllid Ewropeaidd a fyddai wedi dod i Gymru; nid yw hyn wedi cael ei ddatrys.

Os na fydd Llywodraeth y DU yn gallu sicrhau cyfranogiad yn Erasmus+ ac yn methu cynnig cynllun yn lle hynny yn y DU, yna byddai'n rhaid i Lywodraeth Cymru edrych yn ofalus iawn ar yr ystod bresennol o weithgareddau Erasmus+ ac ystyried yr hyn y gellir ei gyflawni â'r adnoddau sydd ar gael i ni.

Mae Erasmus+ yn rhaglen sydd yn berthnasol i'r DU gyfan ac mae hi'n cael ei gweinyddu gan yr Asiantaeth Genedlaethol, sef partneriaeth rhwng y Cyngor Prydeinig ac Ecorys ar ran yr Adran Addysg yn Lloegr a Gweinyddiaethau Datganoledig Cymru, Gogledd Iwerddon a'r Alban. Mae swyddogion yn parhau i gynnal trafodaethau rheolaidd â chyfatebwyr yng nghyswllt gweithredu Erasmus+ o dan delerau gwarantiad Trysorlys ei Mawrhydi. Hefyd maent yn cynnal trafodaethau ar gynlluniau wrth gefn ar gyfer parhau i ddarparu'r rhaglen wrth i'r DU adael yr UE, gan gynnwys ar gyfer y rheini sy'n astudio graddau ieithoedd modern.

Argymhelliad 8

Rhaid i Lywodraeth Cymru gomisiynu prosiect ymchwil pellach, gan ddatblygu'r gwaith diweddar a lywiodd y cynllun treialu symudedd rhyngwladol, a hynny er mwyn llunio darlun manylach o effaith symudedd rhyngwladol ar allbynnau myfyrwyr o grwpiau sy'n cael eu tangynrychioli yng Nghymru, gan adrodd yn ôl i'r Pwyllgor cyn pen 6 mis.

Derbyn

Ym mis Ionawr 2018, fe wnaeth Llywodraeth Cymru benodi OB3 Research, ar y cyd â Sefydliad Ymchwil, Data a Methodoleg Gymdeithasol ac Economaidd Cymru (WISERD) Prifysgol Caerdydd, i ymgymryd ag astudiaeth gwmpasu gyda'r brif nod o ddarparu tystiolaeth i gefnogi'r gwaith o ddatblygu cynllun treialu astudio dramor.

Roedd y gwaith maes yn cynnwys adolygiad llenyddiaeth o symudedd myfyrwyr rhyngwladol ac adolygiad o'r darpariaethau cyllid presennol yng Nghymru a thramor. Cynhaliwyd cyfweiliadau gyda swyddogion Llywodraeth Cymru a chynrychiolwyr o sefydliadau rhanddeiliaid allweddol, gan gynnwys Sefydliadau Addysg Uwch. Hefyd, cynhaliwyd cyfweiliadau gyda myfyrwyr tramor presennol a rhai a oedd yn arfer astudio dramor, yn ogystal â grwpiau ffocws a oedd yn cynnwys myfyrwyr sydd â diddordeb mewn astudio dramor.

Er bod yr astudiaeth wedi canfod nad oes digon o ddata i allu cyfrif nifer yr holl fyfyrwyr sy'n huanu o Gymru ac sy'n astudio gradd dramor, mae'r adroddiad yn dadansoddi datganiadau niferoedd Asiantaeth Ystadegau Addysg Uwch dros bedair blynedd (2013-17) o ran y myfyrwyr o Gymru sy'n astudio yn y DU ac sydd wedi astudio dramor am hyd at flwyddyn.

Rydyn ni'n gwybod bod y nifer o fyfyrwyr sy'n huanu o Gymru ac sy'n gwirfoddoli neu ar brofiad gwaith dramor yn dal i fod yn isel, sef llai na 2 y cant o gyfanswm poblogaeth y myfyrwyr sy'n huanu o Gymru. Yn wir, mae'r adroddiad a gomisiynwyd

yn gynharach eleni gan OB3 Research, ar y cyd â Sefydliad Ymchwil, Data a Methodoleg Gymdeithasol ac Economaidd Cymru (WISERD), yn nodi bod y dystiolaeth yn awgrymu bod myfyrwyr sy'n hanu o Gymru yn llai tebygol o astudio dramor na'u cyfatebwyr yn y DU ac yn Ewrop, ynghyd â myfyrwyr rhyngwladol yn gyffredinol. Mae galw cudd yng Nghymru yn debygol o fod yn isel ac yn llawer is na 200 y flwyddyn.

Bydd y cynllun treialu ei hun, ynghyd â'r gwerthusiad ohono, yn rhoi cyfle i ni brofi bod y galw drwy gynnig cyfnodau astudio byr o bosib yn fwy deniadol i'r myfyrwyr hynny a fyddai fel arall yn dewis peidio ag astudio dramor am gyfnod hirach. Yn wir, mae adroddiad OB3 yn nodi bod 'twf cyson wedi bod yn nifer gyffredinol y myfyrwyr sy'n hanu o Gymru ac sy'n astudio, yn gwirfoddoli neu'n ymgymryd â phrofiad gwaith dramor yn ystod y pedair blynedd ddiwethaf. Mae'r niferoedd wedi dyblu bron, o 796 yn 2013/14 i 1,430 yn 2016/17, a hynny ar adeg pan roedd poblogaeth gyffredinol y myfyrwyr sy'n hanu o Gymru ac sy'n astudio mewn Sefydliadau Addysg Uwch wedi gostwng 10 y cant.' Mae'r cynllun treialu yn rhoi cyfle i ni adeiladu ar hyn.

Argymhelliad 9

Rhaid i Lywodraeth Cymru barhau i roi pwysau ar Lywodraeth y DU i sicrhau bod buddsoddiadau rhanbarthol yn y dyfodol yn cael eu datganoli i Gymru ac i sicrhau ei bod Llywodraeth y DU yn bwrw ymlaen â'i hymrwymiad i sicrhau na fydd buddsoddiadau rhanbarthol yn y dyfodol yn rhan o gyllidebau craidd Cymru ac y byddant yn aros yn rhai amlflwydd o ran natur.

Derbyn

Mae safbwynt Llywodraeth Cymru yn glir wrth ddatgan na ddylai Cymru fod yn waeth ei byd o gwbl ar ôl Brexit. Fe wnaethom lansio ein papur Buddsoddi Rhanbarthol yng Nghymru ar ôl papur Brexit ar 14 Rhagfyr 2017, sy'n datblygu ein syniadau ar gyfer dyfodol y polisi buddsoddi rhanbarthol yng Nghymru. Byddwn yn parhau i roi pwysau ar Lywodraeth y DU er mwyn cael sicrwydd y bydd pob ceiniog o'r £370m y mae Cymru ar hyn o bryd yn ei gael bob blwyddyn gan Gronfeydd Strwythurol a Buddsoddi yr UE yn cael ei ddisodli gan Lywodraeth y DU fel addasiad parhaol am i fyny i gyllideb Llywodraeth Cymru.

Argymhelliad 10

Rhaid i Lywodraeth Cymru weithio'n agos gyda'r sector addysg uwch a'r sector addysg bellach wrth ddatblygu unrhyw gynigion buddsoddi rhanbarthol, i sicrhau bod y rhan allweddol sydd gan brifysgolion a cholegau o ran lleihau anghydraddoldeb a chynyddu cynhyrchiant yn cael ei hystyried.

Derbyn

Fe wnaeth Llywodraeth Cymru sefydlu'r Gweithgor Brexit Addysg Uwch ym mis Medi 2016 i rannu dealltwriaeth a darparu cyngor ar oblygiadau Brexit. Erbyn hyn mae hwn yn cynnwys cynrychiolaeth o'r sector addysg bellach.

Rydyn ni'n gwerthfawrogi'r cyfraniad i'r grŵp hwn a byddwn ni'n sicrhau, drwy gyfrwng y grŵp hwn a'n hymgysylltiadau ehangach â'r sectorau, y bydd eu safbwyntiau ar amrywiaeth o faterion, gan gynnwys lleihau anghydraddoldeb a chynyddu cynhyrchiant, yn cael eu hystyried yn briodol.

Argymhelliad 11

Rhaid i Lywodraeth Cymru ymrwymo i weithio ar y cyd â'r sector addysg bellach er mwyn llunio a datblygu cynllun ar y cyd, a fydd wedi'i ariannu gan gynnig i Gronfa Bontio'r UE ac yn ystyried yr anghenion rhanbarthol amrywiol, a hynny er mwyn nodi ac ymateb i unrhyw alw sy'n newid o ran sgiliau yn y sectorau hynny sydd fwyaf tebygol o wynebu aflonyddwch yn sgil Brexit.

Derbyn

Mae Llywodraeth Cymru yn cefnogi ac yn cydnabod y rhan bwysig sydd gan Bartneriaethau Sgiliau Rhanbarthol o ran cynhyrchu deallusrwydd rhanbarthol o dan arweiniad cyflogwyr. Mae Partneriaethau Sgiliau Rhanbarthol yn cyflwyno adroddiadau blynyddol i Lywodraeth Cymru sy'n tynnu sylw at flaenoriaethau rhanbarthol ar gyfer cyflogadwyedd a sgiliau, yn seiliedig ar anghenion cyflogwyr. Mae'r dull hwn yn galluogi Llywodraeth Cymru i unioni'r sgiliau rhanbarthol sy'n cael eu darparu â chyfleoedd buddsoddi a thwf, a hynny fel rhan o symudiad i roi dull strategol newydd ar waith yng nghyswllt cynllunio a chyllido ôl-16.

Mae Partneriaethau Sgiliau Rhanbarthol hefyd yn darparu dealltwriaeth o sgiliau strategol sy'n sail i Fargeinion Dinesig a Cheisiadau Twf. Roedd "Yr Adroddiad Annibynnol ar Lywodraethu Partneriaethau Sgiliau Rhanbarthol yng Nghymru" gan Dr John Graystone (Mawrth 2018) yn argymhell bod y Partneriaethau Sgiliau Rhanbarthol yn aros yn annibynnol o ran capasiti cynghori Llywodraeth Cymru ac yn argymhell bod y Partneriaethau Sgiliau Rhanbarthol yn dal i weithredu fel cyrff hyd braich. Mae hyn yn rhoi rôl allweddol iddynt i ddarparu arweiniad a chynghor annibynnol i Lywodraeth Cymru yng nghyswllt nodi anghenion sgiliau rhanbarthol. Mae hwn yn un o egwyddorion sylfaenol y dull newydd ar gyfer cyllido a chynllunio strategol ôl-16, sy'n canolbwyntio ar y cysyniad "ar sail galw".

Bydd Llywodraeth Cymru yn gofyn i Bartneriaethau Sgiliau Rhanbarthol ymgynghori'n agos â'u rhwydweithiau cyflogwyr er mwyn llywio ein gwaith ar effeithiau Brexit ar sectorau sydd o bwys rhanbarthol.

Mae fy swyddogion wrthi'n datblygu cynigion ar gyfer cyfres o brosiectau sgiliau er mwyn helpu i feithrin cadernid Cymru er mwyn iddi gael ei hystyried i gael

cefnogaeth gan Gronfa Bontio'r UE. Bydd y gwaith hwn yn cael ei lywio drwy ymgysylltu'n uniongyrchol â'n rhanddeiliaid.

Argymhelliad 12

Rhaid i Lywodraeth Cymru gydnabod y pwysigrwydd sylfaenol sydd gan ymchwil ac arloesi i ffyniant Cymru a chydabod y perygl cynhenid sy'n gysylltiedig â bod ar ei hôl hi o gymharu â Lloegr a'r Alban wrth ariannu'r gweithgareddau hyn mewn sefyllfa hynod gystadleuol. Felly, rhaid i Lywodraeth Cymru fynd ati'n syth i ddechrau ariannu'r argymhellion sydd wedi'u gwneud gan yr Athro Reid yn ei adolygiad.

Derbyn yn rhannol.

Mae Llywodraeth Cymru yn derbyn canfyddiadau ac argymhellion adolygiad Reid mewn egwyddor.

Dyma'r prif negeseuon y mae Llywodraeth wedi'u cael o'r adolygiad ac sydd wrthi'n cael eu datblygu:

- cynyddu gwelededd a dylanwad ymchwil Cymru ac, yn benodol, dal ati gyda "phresenoldeb pwrpasol yn Llundain i hyrwyddo Arloesi ac Ymchwil yng Nghymru"
- sicrhau lefelau cydradd o gyllid arloesi ac ymchwil heb ei neilltuo i Gymru, o gymharu â gweddill y DU, pan fo hynny'n bosib: Roedd hyn yn cynnwys cryfhau sylfaen ymchwil bresennol Cymru er mwyn galluogi ymchwilwyr o Gymru i gystadlu am gyfran fwy o gyllid newydd ar draws UKRI drwy weithredu argymhellion Diamond ar gyfer cyllid sy'n gysylltiedig ag ansawdd a chyllid cyfnewid gwybodaeth ac, yn ychwanegol at hynny, cymell ymchwilwyr o Gymru i ennill rhagor o gyllid o'r tu allan i Gymru.
- Cynyddu cysondeb ac effaith cyllid a chymorth ymchwil ac arloesi ar gyfer busnesau er mwyn sicrhau mwy o weithgareddau ac ymgysylltu'n fwy effeithiol â buddsoddwyr, y tu allan i Lywodraeth Cymru ar ôl Brexit.

Roedd yr argymhelliad cyntaf yn gofyn i Lywodraeth Cymru gynyddu gwelededd a dylanwad ymchwil Cymru drwy greu Swyddfa Ymchwil ac Arloesi Cymru newydd yn Llundain (WRILO) ac o ganlyniad uniongyrchol i hynny, rydyn ni wrthi'n recriwtio staff i ymgymryd â'r swyddi newydd. Mae gwir angen ailgydbwyso gwariant gwyddoniaeth, ymchwil ac arloesi ar draws y DU, gan annog twf rhanbarthol a mynd ar drywydd rhagor o fuddsoddiadau a chynhyrchiant. Rydyn ni'n cydnabod y bydd gan y tîm hwn rôl allweddol i'w chwarae wrth gynyddu gwelededd Cymru.

Mae'r ail a'r trydydd argymhelliad yn Adolygiad Reid yn ymwneud ag adnoddau'r dyfodol, y tu hwnt i gyllidebau presennol a bydd angen eu hystyried fel rhan o ystyriaethau cyllidebu'r dyfodol.

NAFSA 2015: Report to Funders

1. Introduction

This report details universities in Wales' activities at the NAFSA 2015 conference and exhibition, and makes recommendations for future activity for Welsh universities' NAFSA presence going forward.

2. Background

NAFSA: Association of International Educators is a non-profit organisation for professionals in all areas of international education. This includes education abroad advice and administration, international student advice, campus internationalisation, admissions, outreach, overseas advice, and English as a second language administration. NAFSA's mission is to advance international education and exchange and global workforce development.

Each year, the NAFSA event brings together between 9,000 and 14,000 educators, influencers, practitioners and industry professionals in the field of international education for five days of training, workshops, educational sessions, and networking opportunities. The event is a one stop shop for business between countries in higher education, research, and innovation from across the globe. It is the largest single event for international educators in the world.

In 2015, the NAFSA annual conference and exhibition took place in Boston, Massachusetts, from 25-29 May. Wales' universities attended the conference, hosting a booth in the exhibition hall and a Wales reception where the new Study in Wales brand was officially launched. The Welsh presence was funded by Universities Wales (Unis Wales), British Council Wales (BC Wales), the Welsh Government (WG) and five of the Welsh universities each paying for a table on the stand.

This report is being submitted to the Vice Chancellors of Wales' universities, WG officials, and BC Wales.

3. NAFSA Exhibition

The NAFSA international education exhibition 2015 acted as a gateway for Wales' universities to meet face to face with around 300 overseas partners as well as hundreds of new contacts.¹ These ranged from institutional leaders to programme representatives, service and technology providers, and educational suppliers. The exhibition allowed university colleagues to: connect face to face with colleagues from around the world; discuss local needs; establish partnerships with institutions, organisations and individuals; and network.

¹ See NAFSA Partners and Contacts table, page 6

NAFSA conference delegates this year came from more than 100 countries and exhibitors included Argentina, Australia, Belgium, Brazil, Canada, China, Costa Rica, Germany, Hong Kong, India, Indonesia, Italy, Japan, Malaysia, Mexico, Morocco, Norway, Peru, Poland, Russia, Singapore, Spain, Sweden, Taiwan, Thailand, Turkey, as well as the USA. 60% of participants were based in the USA. Of the non US participants, the make-up was:

- Europe 40%
- Asia / Pacific 34%
- Latin America 9%
- North America 16%
- Africa 1%

The event provided a forum for Wales to have a high-profile presence to showcase its offering. Universities in Wales worked together at the event primarily promoting Wales as a whole, with their respective university promotion underpinning the Wales-wide messages. Wales' universities remain keen to expand their presence in the worldwide market and build upon the extensive work undertaken in the last few years. This aspiration has been underpinned by a commitment in the WG's HE Statement:

*'Universities and the Welsh Government will work in partnership to develop international links that will help Wales become a partner of choice for international business and investment and destination of choice for international students and staff. Wales needs to strengthen and maximise the value of the international connections already forged by universities, using those connections to drive inward investment. Wales must project the consistent message overseas that we are open for business and that international students add to the richness and diversity of the student body and are, therefore, welcome and valued.'*²

It is also a key theme of the WG's tourism strategy 'Partnership for Growth'³ that states:

'... the new strategy will mean focusing upon five key areas – Promoting the Brand, Product Development, People Development, Profitable Performance and Place Building. Overseas, the three key markets identified by the panel are Ireland, Germany and USA.... Our key to delivering growth during these difficult times will be working in partnership to maximise resources and intelligence and working together to make Wales a stronger tourism destination.'

² [Welsh Government HE Statement](#)

³ [Welsh Government Tourism Strategy 'Partnership for Growth'](#)

4. Funding for Wales at NAFSA 2015

Universities in Wales had a budget of £52,500 for NAFSA 2015. This included 25,000 from participating universities as well as a grant of £15,000 from Welsh Government, £10,000 from Universities Wales, and £2,500 from British Council Wales. The breakdown of expenditure for Wales at NAFSA 2015 is included in Annex D.

Aberystwyth University (AU), Bangor University (BU), Cardiff University (CU), Swansea University (SU) and the University of Wales Trinity Saint David (UWTSD) each invested £5,000 in the Study in Wales stand. The University of South Wales (USW) also attended the conference and Wales reception, but did not opt for a table on the booth.

5. Wales Activity at NAFSA 2015

Wales' presence at NAFSA comprised of two principal activities: the Study in Wales booth and the Wales reception. All the Welsh universities that attended provided comprehensive feedback on their attendance and participation at both events (detailed below). Universities met a range of new and existing partners and will be monitoring the impact of this activity moving forward as part of their wider international activities.

i) *The 'Study in Wales' Booth*

The booth is the most visual element of a country's presence at NAFSA and feedback from NAFSA 2014 was that Wales had to up its game in respect of the booth. Unis Wales used this feedback and ensured that the 2015 booth was visually impressive; two very large hanging banners with a striking image of the Welsh coast were visible from the entrance to the hall. The use of the new 'Study in Wales' logo and marketing materials provided brand continuity and a more professional look to the booth. The space (30'x 20') allowed for meeting space for the five universities who had contributed financially to the booth. University colleagues, their partners and passers-by all commented on the quality of the booth's finish and its striking appearance. The booth design is included in Annex B.

Catering was organised for a booth launch of 'Study in Wales' on 28 May to raise awareness of the brand (the main launch took place at the Wales reception on 26 May - see below). Universities Wales placed an advertisement in the hard copy of the Chronicle newspaper to coincide with NAFSA to drive traffic towards the booth. There were over 100 attendees at the booth launch, with most taking part in a competition to win Welsh themed prizes by entering their business cards into a draw (over 90 business cards were entered in total).

ii) *The Wales Reception (Main launch of Study in Wales)*

The Wales reception has become an annual event at NAFSA and is an opportunity for Welsh universities to meet with partners, maintain existing relationships, and to showcase the best of Wales. Given that the event has built a reputation for being welcoming and engaging, the decision was taken to organise a small scale event in terms of venue capacity and to invite all of the Welsh universities' key partners and contacts. This made for a busy

and vibrant atmosphere for the launch of Study in Wales and maintained partners' expectations in terms of the type of event staged.

The reception was well attended with the venue full to capacity (100 guests). The venue was decorated with Welsh flags and bunting and guests were served Welsh themed food and drinks, including Welsh cheeses provided by Welsh Government Trade and Invest in the US. The Vice Chancellor of Aberystwyth University, Professor April McMahon, gave a speech launching Study in Wales. The speech, which was very well received, was an opportunity to promote all of the Welsh universities and to highlight the key messages of the new Study in Wales brand.

iii) *Web and social media*

The launch of Study in Wales also involved launching the new www.studyinwales.ac.uk website and @StudyWales twitter feed. From 25 May to 1 June, @StudyWales tweets received over 37,000 views and over 1,200 twitter engagements. This boosted traffic to the website, which went from 0 (pre-launch) to over 250 visitors during the 5 day NAFSA period.

6. International Partners and Contacts

Overall, Welsh universities increased the number of collaborations made and meetings held during NAFSA 2015, demonstrating the value and consistent demand for a strong Welsh presence from Wales at the event.

The feedback detailed on the following pages has been provided by representatives of the institutions who attended:

- Aberystwyth University (AU);
- Bangor University (BU);
- Cardiff University (CU);
- Swansea University (SU);
- University of South Wales (USW)
- The University of Wales Trinity Saint David (UWTSD)

The table below outlines the number of **existing partners** met, the number of **new partners** met and the number of **new contacts** made during NAFSA. It also shows the figures from 2013-2015 for comparison:

University	2013 Existing Partners	2014 Existing Partners	2015 Existing Partners	2013 New Partners	2014 New Partners	2015 New Partners	2013 New Contacts	2014 New Contacts	2015 New Contacts
AU	14	29	27	22	34	22	11	48	5
BU	26	29	35	25	22	21	112	68	58
CU	14	14	36	11	22	38	0	54	169
SU	45	44	40	4	5	8	0	54	8
USW	10	16	34	34	18	11	0	64	31
UWTSD	n/a	n/a	14	n/a	n/a	6	n/a	n/a	9
Total	109	132	186	96	101	106	123	288	280

Regional Spread

Taking existing and new partners together, Welsh universities met with partners from 22 countries worldwide whilst at NAFSA 2015. These were: the United States, Canada, Brazil, Argentina, Mexico, China, Hong Kong, South Korea, Singapore, Malaysia, Japan, Australia, New Zealand, Azerbaijan, Kazakhstan, France, Germany, Netherlands, Denmark, Sweden, Norway and Ireland.

Unfortunately, not all universities have returned a breakdown detailing numbers per country at this point. However, Cardiff University's figures provide a helpful example: of their combined total of 74 partners met, 46% were North American, 21% Asian, 14% Latin American, 14% Australasian, 5% European.

7. Feedback on the Wales Booth and Reception

The Study in Wales presence – both booth and reception - received positive feedback from Welsh university representatives, their international partners and passers-by. Below are some examples of their feedback:

What a beautiful stand – I wish I'd studied in Wales!

Sevsen Bati, Head of International Relations, Bezmialem Vakif University, Turkey

The new Study in Wales booth is very striking with a friendly, open and inviting atmosphere. Congratulations, a great new booth for 2015.

Evan Mills, University of Vermont

Great design and loads of space. It was so much better than in previous years and looked very professional. We had lots of positive comments from partners.

Rose Matthews, Cardiff University

Feedback from my partners (about the reception) was excellent.

Dr Robert Morgan, University of South Wales

University representatives were also asked for feedback as to how the Welsh presence could be improved in future years. Below are some of the ideas they expressed:

The booth is a great space for meeting existing partners and a great showcase for "Brand Wales" However, there wasn't much of an opportunity for individual institutional branding and we would encourage more of this next year.

University of Wales Trinity Saint David

The 2015 booth made a dramatic impact at NAFSA, delegates were stopping to take pictures of the scenic banners. The investment in quality furnishings provided a professional and academic environment in which to hold meetings with existing/new partners. Again, location could have been better, but given the design of the booth, it did actually work well for us this year.

Angela Jones, Swansea University

8. Benefits of Wales' Presence at NAFSA

As NAFSA is a worldwide conference it is a cost effective way of raising Wales' profile on the international stage and meeting colleagues from around the globe in one location. Colleagues from the participating Welsh universities all cite this as being the primary benefit for them of taking part.

It is widely recognised by universities, business and government that an international mobility placement can greatly enhance students' academic performance and employability⁴. Internationally focused degree programmes also enable universities in Wales to attract the best and brightest undergraduate students to their courses. The NAFSA conference enables universities in Wales to raise their profile globally, but especially in the US and Canada. This enables them to develop increased Study Abroad agreements (fee paying, incoming students for an academic year, semester or term, or summer programme) and articulation agreements with international universities. It is essential that we ensure that universities in Wales are able to continue to form these strategic partnerships to enable mobility activities, to remain competitive on the global stage. Wales' participation at NAFSA is critical for universities in Wales to develop these relationships and partnerships.

⁴[Gone International Report](#) (2015)

It is not just universities that are benefitting from a presence at NAFSA. Increasing the research links and student mobility between universities in Wales and the USA also stimulates partnerships with industry, encouraging continuing investment in Wales which in turn has a positive impact on the Welsh economy. Aberystwyth University, Bangor University and Cardiff University for example have built close relationships with their Welsh cohorts in the USA, whose main task is promoting Wales for tourism, education, and business development. A range of American companies have relocated to Wales, or have opened branch offices here, for example, GE Healthcare, OSTC Trading Company, and Hartswood Films. There has also been substantial growth in industrial links in the creative industries, energy and natural resources, as well as in scientific and manufacturing partnerships. The USA is a significant investor in Wales, and it is vital for Wales to build on its profile at the event.

Further thought and discussion is needed on how Wales' NAFSA activity fits in with an enhanced export approach to international students and education in Wales, of the sort being pursued by the UK Trade and Investment (UKTI) initiative 'Education UK⁵' and the WG's 'Partnership for Growth' strategy. For Wales, NAFSA is a key opportunity to create new relationships for student exchanges, recruit incoming students, and to promote outward mobility for students in Wales to study in other countries. NAFSA provides a platform to advertise Wales as a country on the global stage, promote tourism, enable departmental exchanges and promote industry links for Wales and for universities in Wales.

9. Recommendations following NAFSA 2015

The key recommendations from Wales' NAFSA representatives following the 2014 conference and exhibition included: securing a continued presence at NAFSA going forward; securing a funding package comprising of university, government and British Council sponsorship early enough to book a prime location; to create a sharp new branding campaign; and to explore corporate sponsorship opportunities.

The vast majority of the recommendations from last year's conference have been achieved. For example, the launch of Study in Wales in time for NAFSA 2015 enabled Wales to showcase its distinctive new brand for the first time at the conference. Also, the new Global Wales partnership has set out a three year plan to support Wales' NAFSA activities going forward. Global Wales is currently in a position to provide match-funding of £27,000 for NAFSA 2016. However, this is dependent on a sufficient number of Welsh universities committing to invest in the stand. Without this it will be difficult to book a prime location in time for NAFSA 2016.

The key recommendations for 2016 are therefore as follows:

1. To secure a commitment of £5000 each from the Welsh universities keen to participate on the stand of £5000 (or £500 from those opting out of the stand and taking part in the reception). This will form part of the funding package already

⁵ [Education UK](#)

secured and agreed by the Global Wales partners and should be early enough in the NAFSA timetable, ideally by end September 2015, to ensure a prime location and significant and professional presence in the exhibition hall.

2. To ensure the Wales booth is located within the 'UK sector' in the exhibition hall, to emphasise that Wales is part of the UK – alongside the BC pavilion and the Study in Scotland stand. This is to a large extent dependent on the outcome of Recommendation 1.
3. To ensure enough scope for universities to display individual branding on the Study in Wales stand.
4. To use the WG, BC and Welsh university networks to explore corporate sponsorship for a NAFSA reception, for example, a Welsh drinks company. If successful, explore celebrity alumni, noteworthy academics, or honorary degree holders to 'host' the reception event.

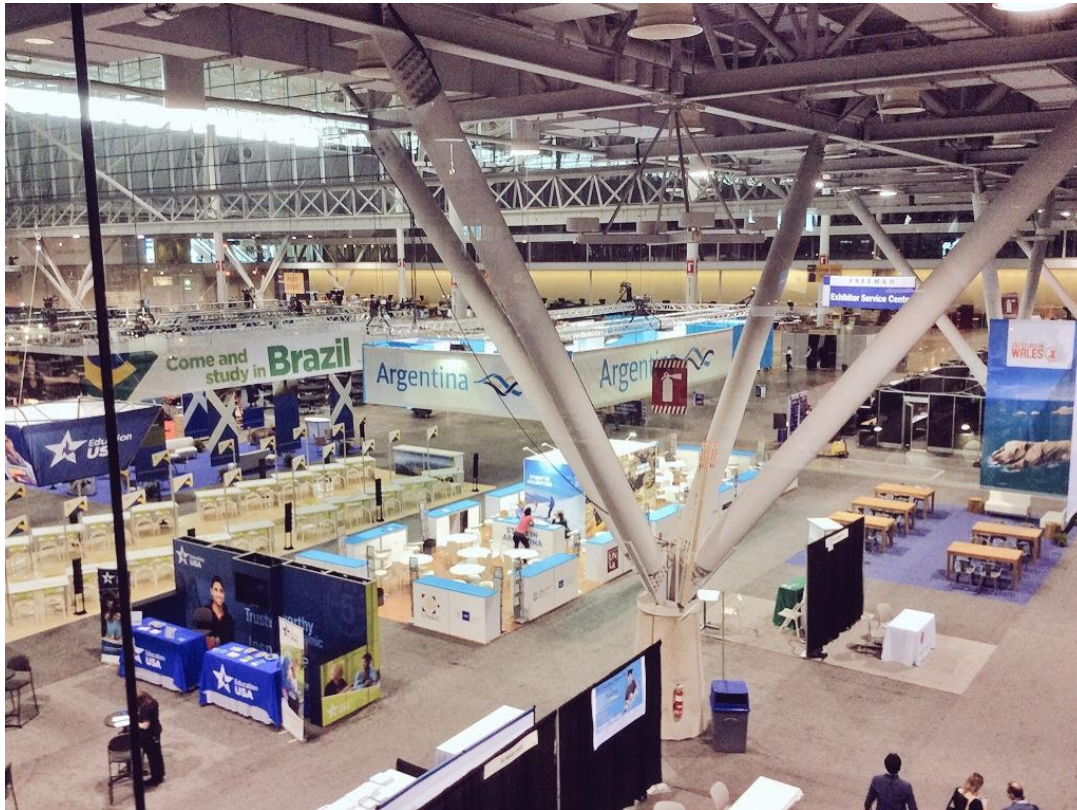
10. The future of Wales at NAFSA: Next Steps

The 2016 NAFSA annual conference and exhibition is taking place from 29 May – 3 June in Denver, Colorado. The conference theme is 'Building Capacity for Global Learning'.

Universities Wales will be discussing proposals at its Autumn 2015 committee meeting to reflect on how Wales' NAFSA activity dovetails with Global Wales' priority markets activities; the US looks highly likely to emerge as a priority market for the partnership.

Annex A: Photographs from NAFSA 2015

NAFSA Expo Hall and Study in Wales Booth (before opening of Expo Hall)



The Study in Wales Booth



Booth Launch of Study in Wales



Partner meetings taking place on the Booth

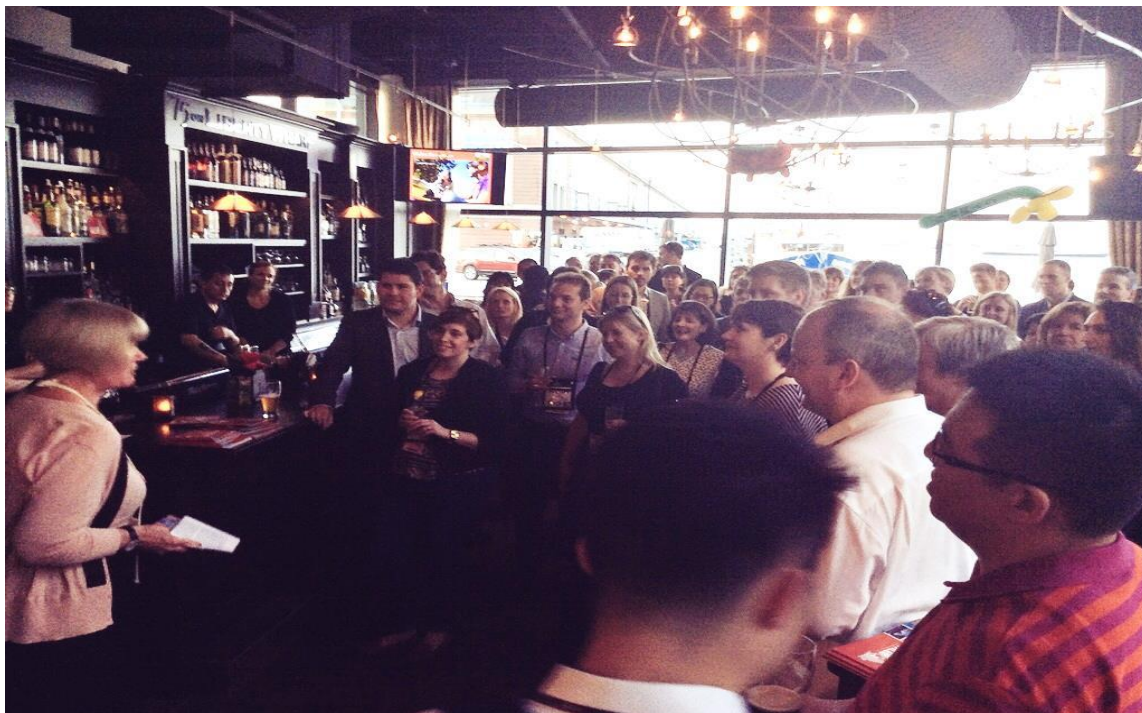


A selection of other booths (Japan, British Council, Sweden, Norway)





Professor McMahon delivering her speech at Study in Wales launch / Wales reception



Annex B: Study in Waes booth – 3D rendering with graphics

Study in Wales 20x30



Study in Wales 20x30



NAFSA 2016: Report to Funders

1. Introduction

This report details the 'Study in Wales' presence at the NAFSA 2016 conference and exhibition, and makes recommendations for future activity for Welsh universities' NAFSA presence going forward.

2. Background

NAFSA or 'Association of International Educators' is a non-profit organisation for professionals in all areas of international education. This includes education abroad advice and administration, international student advice, campus internationalisation, admissions, outreach, overseas advice, and English as a second language administration.

Each year, the NAFSA Annual Conference brings together between 9,000 and 14,000 practitioners and industry professionals in the field of international education for five days of networking, workshops and educational sessions. The event is a one-stop-shop for business between countries in higher education and research from across the globe. It is the largest single international higher education event in the world.

In 2016, the NAFSA Annual Conference took place in Denver, Colorado from 30th May to the 3rd June. Wales' universities attended the conference, hosting a booth in the exhibition hall, holding a 'Study in Wales' panel session on the conference floor and hosting a reception for international partners. The Welsh presence was funded by Universities Wales (Unis Wales), British Council Wales (BC Wales) and Welsh Government (WG) through the 'Global Wales' partnership as well as through contributions from the participating Welsh universities.

This report is being submitted to the Vice Chancellors of Wales' universities, WG officials, and BC Wales.

3. Benefits of attending NAFSA

Universities

NAFSA is a worldwide conference and as such is a cost effective way of raising universities' profiles on the international stage and meeting partners from around the globe in one location. The meetings conducted at NAFSA help to foster the relationship between our universities and key international partners, most of which send fee-paying students to Wales. This year colleagues met with around 250 overseas partners¹, from study abroad and exchange partners to institutional and departmental level collaborations. Keeping those partners updated on changes that could influence the decisions of their students is vital to maintain a good working relationship. Colleagues from the participating Welsh universities all cite this as being the primary benefit for them of taking part.

¹ See 'International Partners and Contacts', page 4

NAFSA conference delegates this year came from more than 100 countries. 60% of participants were based in the USA. Of the non US participants, the make-up was:

- Europe 40%
- Asia / Pacific 34%
- Latin America 9%
- North America 16%
- Africa 1%

Wales

The US is one of Global Wales' two priority markets, making the NAFSA conference an invaluable opportunity to showcase our offer. As well as directly benefitting Welsh universities, NAFSA provides a high-profile platform to boost Wales' profile more broadly. Universities in Wales work together at the event promoting Wales as a whole, with their respective university promotion underpinning the Wales-wide messages.

The Study in Wales stand provides a visual centrepiece for promoting Wales as a tourist destination. The images shown in Annex A show the two large banners showcasing the Welsh coastline, which provide a striking backdrop to the stand and which generate a significant amount of interest from passers-by at the event. In addition to promoting Wales as a destination to colleagues representing universities across the globe, every international student that comes to Wales attracts on average two overseas visitors, resulting in over 50,000 international visits to Wales by friends and family of international students in 2014-15.

Research collaboration between universities in Wales and the USA also stimulates partnerships with industry, thereby encouraging further investment to Wales. Despite the fact that NAFSA is not intended as a conference to drive university-industry collaboration, the indirect benefit of the wider institutional partnerships consolidated at NAFSA should not be ignored.

In summary, for Wales NAFSA is an opportunity to create new relationships for student exchanges, recruit incoming students, and to promote outward mobility for students in Wales to study in other countries. NAFSA also provides a platform to promote Wales as a country on the global stage, boosting tourism, enabling departmental exchanges and promoting industry links with our universities.

4. Funding for Study in Wales at NAFSA 2016

Universities in Wales had a budget of £57,500 for NAFSA 2016; this was £5,000 higher than anticipated due to the participation of an additional university. The budget was comprised of

£30,500 from participating universities and a commitment of £27,000 from the Global Wales partnership.

Aberystwyth University (AU), Bangor University (BU), Cardiff University (CU), Cardiff Metropolitan University (CMU), Swansea University (SU) and the University of Wales Trinity Saint David (UWTSD) each invested £5,000 in the Study in Wales stand. The University of South Wales (USW) also attended the conference but did not opt for a table on the booth. USW contributed £500 for participation in the Wales reception.

The budget increase meant that an underspend of £5,943.67 was achieved. Global Wales's actual contribution to NAFSA therefore decreased to **£21,056.33**, with a commitment that the remainder would be ringfenced for NAFSA 2017. The breakdown of expenditure for Wales at NAFSA 2016 is included in Annex B.

5. Wales Activity at NAFSA 2016

Wales' presence at NAFSA comprised of two principal activities: the Study in Wales booth and the Wales reception. All the Welsh universities that attended provided comprehensive feedback on their attendance and participation at both events (detailed below). Universities met a range of new and existing partners and will be monitoring the impact of this activity moving forward as part of their wider international activities.

i) *The 'Study in Wales' Booth*

The booth is the most visual element of a country's presence at NAFSA and feedback from NAFSA 2015 was that Wales had a much improved presence compared to previous years. Following this positive feedback, we decided to reuse the 'Study in Wales' branding and materials from 2015, enabling us to save on design and production costs and providing continuity in terms of the brand. The booth (20' x 20') allowed for meeting space for the six universities who had contributed financially to the booth. University colleagues, their partners and passers-by all commented on the quality of the booth's finish and its striking appearance.

Catering was organised for the booth for a 'Study in Wales' tea on the afternoon of the 31st May. There were over 100 attendees present at this event. Another addition to this year's booth was a photo-booth, which was hugely successful for networking and in drawing interest in the stand.

ii) *The Wales Reception*

The Wales reception has become an annual event at NAFSA and is an opportunity for Welsh universities to meet with partners, maintain existing relationships, and to showcase the best of Wales. Given that the event has built a reputation for being welcoming and engaging, the decision was taken to organise a small scale event in terms of venue capacity and to invite all of the Welsh universities' key partners and contacts. This made for a busy

and vibrant atmosphere and maintained partners' expectations in terms of the type of event staged.

The reception was well attended with the venue full to capacity (100 guests). The venue was decorated with Welsh flags and bunting and catering was provided. The Vice Chancellor of Aberystwyth University, Professor April McMahon, gave a speech on the importance of our universities international partnerships. The speech, which was very well received, was also an opportunity to promote all of the Welsh universities and to highlight the key messages of the Study in Wales brand.

6. International Partners and Contacts

This year saw a slight drop in the number of partners and contacts made. This is most likely due to the drop in attendance of NAFSA generally this year, from 12,000 in 2015 to 9,500 in 2016. It is thought that this decrease was linked to the location of the conference.

The feedback detailed on the following pages has been provided by representatives of the institutions who attended:

- Aberystwyth University (AU);
- Bangor University (BU);
- Cardiff University (CU);
- Cardiff Metropolitan University
- Swansea University (SU);
- University of South Wales (USW)
- The University of Wales Trinity Saint David (UWTSD)

The table below outlines the number of **existing partners** met and the number of **new partners** met during NAFSA. It also shows the figures from 2014-2015 for comparison:

University	2014 Existing Partners	2015 Existing Partners	2016 Existing Partners	2014 New Partners	2015 New Partners	2016 New Partners
AU	29	27	30	34	22	33
BU	29	35	53	22	21	22
CU	14	36	27	22	38	16
SU	44	40	27	5	8	13
USW	16	34	17	18	11	6
UWTSD	n/a	14	11	n/a	6	4

Total	132	186	165	101	106	94

7. Feedback on the Wales Booth and Reception

The Study in Wales presence – both booth and reception - received positive feedback from Welsh university representatives, their international partners and passers-by. Below are some examples of their feedback:

Excellent; the booth stood out with the amazing backdrop. The photo-booth was a massive and very much appreciated draw to the stand; it was well received by partners and a great way to put names to faces for future reference

Kay Llewellyn, Exchange and Study Abroad Coordinator, Swansea University

The reception was well-planned, with many partners choosing to stay the whole evening. Plenty of food and drink!

Annika Axelsen, Study Abroad Manager, Cardiff University

8. Recommendations following NAFSA 2015

The key recommendations for NAFSA 2016 following on from the previous conference were:

1. To secure a commitment of £5000 each from the Welsh universities keen to participate on the stand of £5000 (or £500 from those opting out of the stand and taking part in the reception). This will form part of the funding package already secured and agreed by the Global Wales partners and should be early enough in the NAFSA timetable, ideally by end September 2015, to ensure a prime location and significant and professional presence in the exhibition hall.

Achieved – This was only possible due to an early commitment from Global Wales and the participating institutions.

2. To ensure the Wales booth is located within the 'UK sector' in the exhibition hall, to emphasise that Wales is part of the UK – alongside the BC pavilion and the Study in Scotland stand. This is to a large extent dependent on the outcome of Recommendation 1.

Achieved – Study in Wales was located next to the British Council stand in the exhibition hall

3. To ensure enough scope for universities to display individual branding on the Study in Wales stand.

Achieved – new signs were produced using some of the additional funding and these can be reused in following years.

4. To use WG, BC and Welsh university networks to explore corporate sponsorship for a NAFSA reception, for example, a Welsh drinks company. If successful, explore celebrity alumni, noteworthy academics, or honorary degree holders to 'host' the reception event.

Ongoing – this was not possible at NAFSA 2016, but as the conference will take place in LA in 2017, the team is exploring options for celebrity and alumni involvement through the Welsh Government office in California.

9. The future of Wales at NAFSA: Next Steps

The 2017 NAFSA annual conference and exhibition is taking place from 28 May – 2 June in Los Angeles, California. The conference theme is 'Expanding Community, Strengthening Connections'.

Recommendations for future NAFSA conferences

1. Ensure early payment of funding contributions for NAFSA 2017 to allow for flexibility to manage unfavourable exchange rate.
2. Use WG, BC and Welsh university networks to explore corporate sponsorship for a NAFSA reception. If successful, explore celebrity alumni, noteworthy academics, or honorary degree holders to 'host' the reception event.
3. Consider whether any materials, including those pertaining to the booth design, need replacing or upgrading for future conferences and assess the cost implications of this.

Annex A: Photographs from NAFSA 2016

Study in Wales Booth



Stand Reception



A selection of other booths





Wales reception





Annex B: Breakdown of NAFSA Budget

NAFSA 2016 BUDGET AND EXPENDITURE

INCOME	£	\$
Study in Wales	£21,056.33	
AU	£5,000.00	
BU	£5,000.00	
CU	£5,000.00	
SU	£5,000.00	
UWTSD	£5,000.00	
Cardiff Met	£5,000.00	
USW	£500.00	
	£51,556.33	\$82359.97

BUDGETED EXPENDITURE

Booth Space	£19,574.01	\$29,457.91
Booth Design Fees	£5,429.59	\$7,615.00
Booth furniture fees	£11,364.66	\$15,678.68
Reception	£8,343.09	\$11,635.75
Tea and cakes	£1,508.67	\$2,134.01
Attendance costs UW	£2,805.75	
Photo Booth	£2,147.88	\$3,050.00
Cost for banners	£0.00	\$0.00
Promo Materials	£702.00	
Refund of booth costs	-£319.32	-\$415.96

Costs £51,556.33 \$69,155.39

current balance £0.00

NAFSA Conference and Exhibition 2017

29 May - 2 June 2017 in Los Angeles, California

Report to: Vice-Chancellors; Pro Vice-Chancellors; Global Wales board

Study in Wales participants

Universities Wales

Aberystwyth University

Bangor University

Cardiff University

Cardiff Metropolitan University

Swansea University

University of Wales Trinity Saint David

University of South Wales

Introduction

Wales benefits socially, culturally and economically from the presence of international students, who have an immediate and significant impact on our country. The strength of Welsh universities in attracting more than 22,000 students from 140 countries all over the world to study in Wales powers the economy, generates jobs and boosts export earnings through increased tourism. By attracting students from abroad, our high-profile, globally-connected universities contribute, both immediately and in the longer term, to the goal of raising the country's profile and attracting investment.

NAFSA, the Association of International Educators, is a non-profit organisation for professionals in all areas of international education. The NAFSA Annual Conference and Expo brings together more than 9,000 worldwide practitioners and industry professionals for networking, workshops and educational sessions. The event helps universities and higher education, research, student and marketing organisations do business in the largest international higher education event in the world.

Wales's universities attended the 2017 conference, with a booth in the Expo Hall and a reception for international partners. The Welsh presence was funded by Universities Wales, British Council Wales, and Welsh Government through the Global Wales partnership and through contributions from the seven participating Welsh universities.

High-level aims

Aim To provide universities with an effective and cost-effective opportunity to create and maintain international institutional working relationships in order to enable international student mobility, particularly with partners from the USA, which is a Global Wales priority market.

Achieved In addition to the Global Wales contribution of £27k, seven universities each contributed £5,000 towards the total cost (£44k) of exhibiting in the Expo hall. The balance of contributions was used for a high-profile reception with partners, and for stand materials. Universities met with more than 300 potential, new and existing partners over the course of the event, from study abroad exchange partners to those at institutional and departmental level, and attended further educational and networking events. Some 60% of NAFSA conference participants are based in the USA.

Aim To work in partnership to project a consistent message internationally that Wales is open for business and that international students are welcome and valued. And:

Aim To raise the profile of Wales, Welsh universities and Welsh higher education globally to boost tourism, enable departmental exchanges and promote research and industry links.

Achieved More than 9,000 worldwide practitioners and industry professionals attended the conference and expo for networking, workshops and educational sessions. Hundreds of delegates visited the stand – many to discuss the Welsh offer with representatives - and all 500 dragon keyrings were gifted during the week. The large banners on the stand gave a striking backdrop, which generated significant interest from passers-by.

Recommendations for 2017

Aim To ensure early payment of funding contributions for NAFSA 2017 to allow for flexibility to manage unfavourable exchange rate.

Achieved Thanks to an early commitment from Global Wales and the participating institutions.

Aim To consider whether any materials, including those pertaining to the booth design, need replacing or upgrading for future conferences, and assess the cost implications of this.

Achieved It was discussed, and later agreed that money would need to be set aside to update the booth design in 2018 as the backdrop had started to fade. Furthermore, it was unlikely to be used in future exhibitions given the limitations on where the backdrop could hang without obscuring the views of other exhibitors.

Aim To use WG, BC and Welsh university networks to explore corporate sponsorship for a NAFSA reception. If successful, explore celebrity alumni, noteworthy academics, or honorary degree holders to 'host' the reception event.

Achieved The Welsh Government office in California helped to secure the use of the Counsel General's residence for the reception, and two UWTSD alumni were key elements of the reception. Furthermore, two LA-based Welsh actors were involved in the event as Study in Wales advocates. There was some exploration of corporate sponsorship (Penderyn Whiskey, Tŷ Nant).

Recommendations for 2018

The 2018 NAFSA annual conference and exhibition, *Diverse Voices, Shared Commitment*, will take place from 27 May to 1 June 2018.

1. To explore other or new ways of increasing the resources for Study in Wales at NAFSA:
 - corporate sponsorship of the Welsh reception with Welsh Government, British Council and Welsh universities.
 - celebrity alumni, noteworthy academics, or honorary degree holders to 'host' the reception event.
 - corporate sponsorship of the Welsh gifts or afternoon reception at the Expo stand.
2. To refresh and update the booth design and backdrop, and that the carry-over from the 2017 budget is put towards this.
3. To seek feedback from visitors to the Study in Wales stand and reception using an online survey, which can feed into future decisions about Study in Wales's positioning at the NAFSA Conference and Expo.

Funding

Our budget for NAFSA 2017 was £61,944, up from £57,500 for NAFSA 2016 thanks to the participation of an additional university. This included:

- £35,000 from participating universities
- £26,944 from Universities Wales's Global Wales budget (which included a carry-over from the previous year)

and covered the costs of the stand, Wales reception, stand extras and the Universities Wales presence.

However, our 'buying power' reduced significantly due to a less favourable exchange rate. Given the budgetary constraints in 2017, it was agreed that Study in Wales would not commit to additional spending in areas such as afternoon tea and a photo booth.

There was an underspend of £1,895 for NAFSA 2017, which has been returned to the Global Wales budget.

Wales activity in 2017

We supported a Study in Wales booth in the Expo Hall and a Study in Wales evening reception. Universities met a range of new and existing partners and will continue to monitor the impact of this activity and the value of their attendance at the conference.

The 'Study in Wales' Booth (organised by Swansea University)

Study in Wales was located close to the British Council and Scotland stands in the Expo Hall, and had a more prominent presence than the British Council. As the most visual element of a country's presence at NAFSA, we used, for the third year, the Study in Wales backdrop and materials from 2015, saving on stand design and production costs, and providing branding continuity. The booth (20' x 20') provided meeting spaces for the seven contributing universities.

Participants, partners and delegates praised the eye-catching stand and backdrop.

The Wales Reception (organised by UWTSD)

The annual Study in Wales reception is a chance for Welsh universities to maintain partnerships, showcase the best of Wales, create a buzz around the Welsh presence and raise our profile on social media. The welcome at the small event with a big reputation has helped to strengthen the draw of the Wales reception. The response from attendees was extremely positive, and we also received extremely good feedback from delegates who had heard about the reception but hadn't attended.

The reception was held at the Consul General's residence in Los Angeles, and the venue was secured with the help of colleagues in the Welsh Government's US offices. The Consul General was in attendance and welcomed the guests and the delegation from Wales. The International Policy Adviser at Universities Wales, Emma Rączka, gave a speech on behalf of universities in Wales, and on the importance of our universities' international partnerships. The brief talk was also an opportunity to promote all of the Welsh universities and to highlight the key messages of the Study in Wales brand.

The reception was well-attended with approximately 70 guests. While we had expected more guests, we received feedback that the distance to the venue (normally 20 minutes) coupled with rush hour traffic (at least doubling the normal travel time) meant many decided at the last minute against attending.

The reception was supported by LA-based Welsh actors Luca Malacrino and Owain Rhys Davies. The guests told the invited audience how growing up in Wales had made them advocates for the nation, and how studying and working abroad had given them perspectives from which students considering universities in Wales could also benefit. Magician Paul Vu also entertained guests, and Hannah Schill photographed the reception. Both are alumni in acting from the University of Wales Trinity Saint David and California State University, Fullerton.

Twitter activity immediately following the Study in Wales reception at NAFSA included:

- Guest and actor [@owainRd Davies](#) tweeting about the reception (903 followers, 9 retweets, 43 likes). One of these retweets was by actress [@JoFroggatt](#) (435,000 followers).
- Guest and actor [@GLucaMalacrino](#) tweeting about the reception to 14,900 followers. This received 68 likes and 29 retweets.

- We are unable to get data about the 'reach' of these social media engagements as they were not initiated by Study in Wales.
- A similar tweet by Study in Wales received 7 likes and 5 retweets. It made 1,224 impressions (the number of times people saw this tweet on Twitter) and received 48 engagements (interactions).

Feedback from Study in Wales partners - meetings

The table below outlines the number of existing partners met and the number of new partners met during NAFSA, showing figures from previous years for comparison:

	Existing partners				Potential / new partners			
University	2014	2015	2016	2017	2014	2015	2016	2017
Aberystwyth	29	27	30	16	34	22	33	10
Bangor	29	35	53	28	22	21	22	31
Cardiff	14	36	27	30	22	38	16	40
Cardiff Met	-	-	No data	15	-	-	No data	40
Swansea	44	40	27	39	5	8	13	8
South Wales	16	34	17	15	18	11	6	9
Trinity Saint David	n/a	14	11	16	n/a	6	4	6
Total	132	186	165	159	101	106	94	144

Feedback from Study in Wales partners - Wales Booth and Reception

The Study in Wales presence – both booth and reception - received positive feedback from Welsh university representatives, their international partners and passers-by.

“The booth...looked and worked pretty well in my limited experience of NAFSA. I had a lot of pre-arranged meetings and occasionally felt I was hogging the table or suddenly needed a table at short notice so not sure how that was perceived by others, but I think it was all fine.

“The reception was excellent on every level. It was a little far out of town so logistically challenging for some and maybe that affected numbers attending, but it was nice to get away from downtown LA and the venue.”

“We really like the stand. Having Study in Wales provides a really positive branding message. If budgets get tighter in the future, I think there is the potential to keep the stand small, as a small busy stand is better than a larger empty one (and bearing in mind that many of our colleagues like to meet in their own booths/pavilions).”

“Booth was great, reception was a little bit far out but great for PR – Thanks to Emma for her celebs! Best speeches ever!”

“As it was my first time at NAFSA I couldn’t compare it to previous years, but liked how the booth was set up and how Wales as a location was portrayed – the dragon keying souvenirs went down really well and even the daffodil and dragon props for photos with partners (although not sure how it compares to the photo booth from the previous year, as I’d heard great things about that!). Due to having a lot of pre-booked meetings, I was also concerned about hogging the table at times so moved to an empty table where possible, but not sure how representatives from other Welsh universities felt about that. I met a few partners at their booth where there were any obvious clashes with meetings, which worked well.

“The Reception was a fantastic event, really enjoyed and was a highlight of the NAFSA experience – guest speakers really passionate and great entertainment, but also feel it could have been even better attended if it hadn’t been so far away – as it felt like other receptions I attended were a lot more central and easier to get to.”

“Not really any recommendations for the booth other than the usual - everyone should have their business cards on the counter, don’t take over each other’s tables etc. I did feel the reception was too far away; nice but too far away!”

“Booth worked well, need for updated design for backdrop.”

Photographs from NAFSA 2017

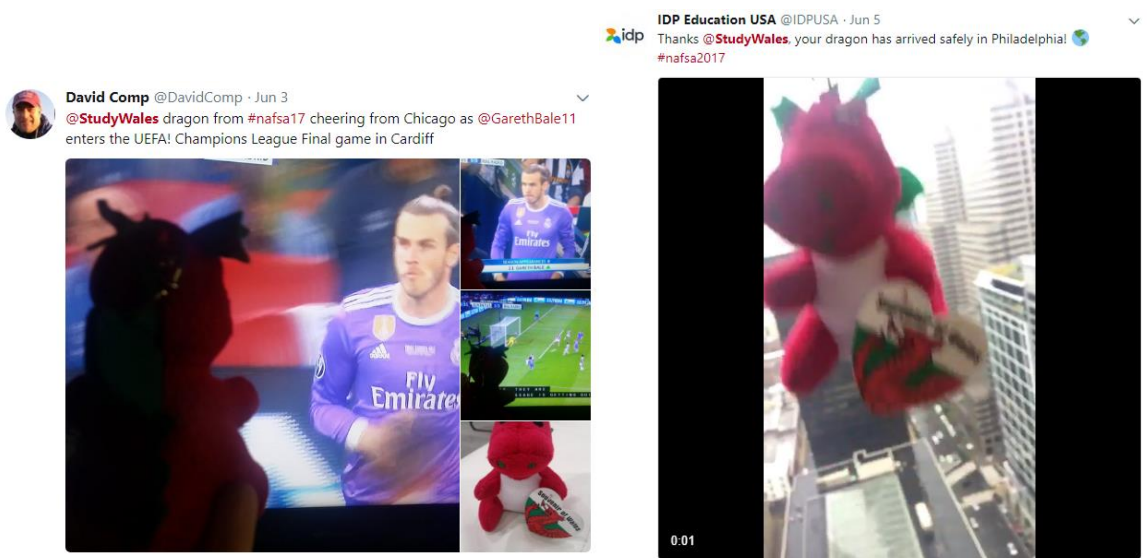
Study in Wales Booth





Social media

We asked some delegates who received a gift from us to post a picture on social media using the hashtags StudyInWales and WalesNAFSA or mention @StudyWales.



UniQuest @UniQuest_UK · Jun 7
Love our new office pet! Thank you @StudyWales #nafsa17



Lisa Shulman @LisaShul · Jun 14
My new pet from @StudyWales decided to join me on a trip to Disneyland!
#nafsa17 #wanderlust #studyabroad



David Comp @DavidComp · Jun 4
#nafsa17 @StudyWales dragon is very excited for the U2 Joshua Tree show tonight at Soldier Field in Chicago!



The blog post written after the event had comments from Welsh actors Luca Malacrino and Owain Rhys Davies.

Luca (Grey's Anatomy, Criminal Minds) said: "As a proud Welshman, I can't emphasise enough the welcome international students have in Wales. I am always explaining to friends in the US how Wales is a country that gets under your skin, and once you go there the ties will last a lifetime. We need to make sure that Wales isn't a well-kept secret, and this is why I was delighted to work with Study in Wales to help bring Wales to the forefront of higher education for international students. I was fortunate to be an international student myself by studying in LA, and I would love to see even more students making the same leap to study across the Atlantic."

Owain (first Welsh actor to star in Twin Peaks) also underlined the benefits of studying in Wales. "It was an absolute pleasure being involved in such a marvellous evening and for such a great cause. To be part of making sure Wales is firmly put on the map where it belongs was significant for me as I want the world to be as in love with the land of song as I

am. Having had the good fortune to study abroad I know first-hand how it can expand your personal, professional, and academic life and I'm sure international students who embrace the adventures of studying in Wales will be richer for it. It's wonderful to see universities work together with such passion and commitment, and I hope that Study in Wales continues its success in bringing institutions together to make Welsh universities famous on the world stage."

Speaker Owain's own guest was Golden Globe Award-winning actress and Downton Abbey star Joanne Froggatt, which caused some excitement among the guests who met her, and further raised our profile on social media.

Wales reception





Universities Wales @Unis_Wales · Jun 9





Expenditure comparison - 2016 and 2017

Income	2016 £	2016 \$	2017 £	2017 \$
Global Wales	21,056.33		26,943.67	
Aberystwyth	5,000.00		5,000.00	
Bangor	5,000.00		5,000.00	
Cardiff	5,000.00		5,000.00	
Cardiff Met	5,000.00		5,000.00	
Swansea	5,000.00		5,000.00	
Trinity Saint David	5,000.00		5,000.00	
South Wales	500.00		5,000.00	
	51,556.33	82,359.97	61,943.67	74,066.05*
Expenditure				
Booth Space	19,574.01	29,457.91	24,938.17	30,250
Booth Design Fees	5,429.59	7,615.00	3,551.52	4,265
Booth furniture fees	11,364.66	15,678.68	15,698.22	18,793.91
Reception	8,343.09	11,635.75	12,494.17	14,939.75
Tea and cakes	1,508.67	2,134.01	0	0
Attendance costs Unis Wales	2,805.75		1,483.24	1,564.59*
Photo Booth	2,147.88	3,050.00	0	0
Promo Materials - gifts	702.00		877.50	925.63*
Promo Materials – brochures and postage			1,005.58	1,060.73*
Refund of booth costs	- 319.32	- 415.96	0	0
Costs	51,556.33	69,155.39	60,048.40	71,800*
Balance	0.00	0.00	1,895.27	2,266.17

Note:

Costs in bold show original currency of transaction.

*Approximate. Costs in GBP are final, and costs in dollars may be approximate (using an exchange rate of £1:\$1.1957).

Total in US\$ is approximate due to fluctuations in the exchange rate.