



Llywodraeth Cymru
Welsh Government

Annex A: List of organisations/submissions

Employers and Industry

1. Construction Industry Training Board Cymru (CITB Cymru)

Work-based learning

2. ACT Training
3. Cambrian Training
4. Educ8 Training
5. National Training Federation for Wales (NTfW)
6. VTCT Skills

Adult and Community Learning

7. Adult Community Learning Rhondda Cynon Taf
8. Adult Learning Wales
9. Carmarthenshire County Council – Community Learning
10. Gower College Swansea – Adult Community Learning
11. Gwent Adult Community Learning Partnership
12. National Centre for Learning Welsh
13. Swansea Adult Community Learning Partnership

Representative Bodies

14. British Academy
15. Chairs of Universities Wales (ChUW)
16. Colegau Cymru / Colleges Wales
17. Cwmpas
18. Engineering Professors' Council
19. Federation of Awarding Bodies
20. Federation of Small Businesses (FSB)
21. GW4 Alliance
22. Institute of Physics
23. Learned Society of Wales (LSW)
24. Learning and Work Institute
25. National Centre for Universities and Business (NCUB)
26. Royal Society of Chemistry
27. Undeb Cenedlaethol Athrawon Cymru (UCAC)
28. Universities Wales

Student Organisations

29. Higher Education Students' Union
30. National Union of Students (NUS)

Mae'r ddogfen hon ar gael yn Gymraeg hefyd / This document is also available in Welsh

Rydym yn croesawu gohebiaeth a galwadau ffôn yn Gymraeg / We welcome correspondence and telephone calls in Welsh

Third Sector

- 31. Academy of Social Sciences
- 32. Dyfodol i'r Iaith
- 33. Environmental Association for Universities and Colleges (EAUC)
- 34. Make UK
- 35. National Association of Specialist Colleges (Natspec)
- 36. National Education Opportunities Network (NEON)
- 37. The King's Trust Cymru

Schools

- 38. Caerleon Comprehensive School Newport
- 39. Catholic Education Service

Trade Unions

- 40. NASUWT – The Teachers' Union
- 41. National Education Union Cymru (NEU Cymru)
- 42. Royal College of Nursing Wales (RCN Wales)
- 43. UNISON
- 44. University and College Union (UCU) (Response 1)
- 45. University and College Union (UCU) – (Response 2)

Higher Education

- 46. Bangor University
- 47. Cardiff Metropolitan University
- 48. Cardiff University (Response 1)
- 49. Cardiff University (Response 2)
- 50. Royal Welsh College of Music and Drama (RWCMD)
- 51. Swansea University
- 52. The Open University in Wales
- 53. University of South Wales (USW) – Response 1
- 54. University of South Wales (Response 2)
- 55. University of Wales Trinity Saint David (UWTSD)
- 56. Wrexham University

Further Education

- 57. Cardiff and Vale College (CAVC)
- 58. Coleg Cymraeg Cenedlaethol
- 59. Coleg Gwent
- 60. Gower College Swansea
- 61. Grŵp Llandrillo Menai (GLLM)
- 62. NPTC Group of Colleges
- 63. St David's Catholic College

Local Authority

- 64. Carmarthenshire County Council
- 65. Ceredigion County Council
- 66. Swansea Council

- 67. Vale of Glamorgan Council
- 68. Welsh Local Government Association (WLGA)

Regulators and Public Bodies

- 69. Careers Wales
- 70. Education Workforce Council (EWC)
- 71. Equality and Human Rights Commission (EHRC)
- 72. Estyn
- 73. Jisc
- 74. Qualifications Wales
- 75. Quality Assurance Agency for Higher Education (QAA)
- 76. Welsh Language Commissioner (Comisiynydd y Gymraeg)

Annex B: Sector tags and analytical variables

Higher Education (HE) - Universities and higher education representative bodies

Further Education (FE) - Colleges and further education representative bodies

Adult Community Learning (ACL) - Organisations involved in adult and community learning provision

Local Authorities (LA) - Local authorities and local government representative organisations

Regional and Partnership Bodies (RPB) - Regional skills partnerships and collaborative bodies

Schools (SCH) - Schools, sixth form or organisations representing school-based post-16 provision

Representative Bodies (RB) - Membership organisations, sector bodies and professional associations

Welsh Language (WL) - Organisations with a primary focus on Welsh language promotion or Welsh-medium provision

Third Sector (TS) - Charities, voluntary organisations and community organisations

Work-Based Learning (WBL) - Organisations delivering work-based learning, vocational training or apprenticeships

Trade Unions (TU) - Trade unions and staff representative organisations

Employers and Industry (EI) - Employer and industry organisations focused on workforce skills, labour market needs and employer engagement in tertiary education.

Analytical Variables

Sector - Identified the part of the tertiary education system represented by the respondent

Role of organisation - Identified the function of the responding organisation

Geography - Distinguished national, regional and local perspectives

Primary focus - Identified the main area of organisational activity

Learner group - Identified the principal learner population represented

Funding model - Distinguished different funding and delivery arrangements

Annex C: Codebook

Include parent and child codes, with short descriptions.

1. Participation

P1 Access, equity and participation

- Barriers to access and participation
- Inequalities across learner groups
- Retention and completion issues

P2 Learner backgrounds & entry profiles

- Socio-economic background, prior attainment, Additional Learning Needs (ALN) and/or disability, locality
- Characteristics of learners entering FE at lower levels

P2 Learner pathways & progression

- Routes between school, FE, HE, apprenticeships, and employment
- Non-linear or second-chance pathways

P3 Suitability of pathways

- Judgements on whether pathways work well or not
- Dead ends, inefficiencies, and misalignment with the labour market

P4 Participation patterns (FE, HE, part-time, mature)

- Growth in FE enrolments
- Mature and part-time HE participation
- Comparisons between participation modes

P5 Future participation & targets

- Predictions about trends
- Views on targets (Level 4+, apprenticeships, age 18 HE)

P6 Welsh-medium participation implications

- Impact of participation trends on Welsh-medium/bilingual provision

2. Demographics and lifelong learning

D1 Demographic change & system preparedness

- Population change, ageing, declining cohorts
- Provider planning and readiness

D2 Barriers to lifelong learning (funding, policy, admin)

- Financial barriers
- Regulatory constraints
- Administrative/system complexity

D3 Flexible learning (supply and demand)

- Availability of flexible provision (modular, part-time, online)
- Barriers to uptake (time, awareness, employer support)

D4 Adult skills need (foundational & vocational)

- Literacy, numeracy, digital skills
- Upskilling/reskilling needs

D5 Adult learning policy & priorities including Personal Learning Account (PLA)

- Lessons from PLA
- Recommendations for adult education priorities
- Section 94 of the Tertiary Education and Research (Wales) Act 2022 discussions

3. Competition and Collaboration

C1 Collaboration (barriers and enablers)

- What prevents or supports collaboration
- Structural, cultural, funding, or policy factors

C2 Cross-sector collaboration (schools, FE, HE)

- School - college transitions
- FE - HE pathways
- Joint delivery or partnerships

C3 Protecting provision (subjects & transitions)

- Safeguarding vulnerable subjects
- Supporting transitions across the system

C4 Market dynamics (competition vs collaboration)

- Effects of competition between providers
- Tension between market behaviour and system planning

C5 HE market structure & risks

- Uncapped undergraduate market
- Future market development
- Cold spots and subject vulnerability

4. Financial Sustainability

F1 Efficiency & delivery models

- Efficient provision models

- Shared services, digital delivery, restructuring

F2 Cost pressures & sustainability challenges

- Financial pressures on institutions
- Sustainability concerns

F3 Cost savings & system efficiencies

- Suggested areas for savings
- System-level efficiency improvements

F4 Learner financial barriers & support

- Cost of living, tuition, transport
- Grants versus loans
- Access to financial support

F5 Returns on investment (economic & social)

- Value of education to individuals, society, economy

F6 Capital investment & infrastructure

- Estates, facilities, digital infrastructure
- Priorities for capital funding

5. Communities and the economy

E1 Outcomes & data Longitudinal Education Outcomes (LEO)

- Graduate outcomes
- Data priorities and gaps
- Measurement of success

E2 Labour market alignment

- Skills gaps
- Employer needs
- Alignment between provision and economy

E3 Research, innovation & investment

- Research funding
- Leveraging private investment
- Economic impact of research

E4 Specialisation & regional clustering

- Institutional specialisation
- Agglomeration effects
- Regional strengths

E5 AI and technological change

- Opportunities and risks of AI
- Impact on teaching, learning, and system design

Annex D: Methodology

Outline

The analysis reviewed written submissions received through the Call for Submissions. Its purpose was to identify the main themes raised across the evidence and to consider where similar or different points were raised by respondent groups. It was not intended to rank submissions or assess the merits of individual responses. Methodological approach was determined by and conducted by analysts in Knowledge and Analytical Services (KAS) in the Welsh Government. The analysis used a thematic analysis approach. This is a way of grouping qualitative evidence into themes while keeping a close link to the original material.

A deductive approach was used. This means the questions in the Call for Submissions were used as the starting framework for coding and analysis. This kept the analysis aligned with the purpose of the call and provided a consistent way to organise and analyse submissions.

Development of the analytical framework

The structure of the call for submissions was used to develop the initial coding framework. Parent and child codes were created to reflect the questions contained in the call. Parent codes were broad themes in the call while child codes were more specific topics within those themes. Inclusion and exclusion criteria were developed to support coding consistency. The codebook was reviewed and discussed by the project team before coding began. This supported a shared understanding of how codes should be applied.

While the parent and child codes reflected the structure of the Call for Submissions, government analysts applied judgement when determining the most appropriate location to place a specific code. This was particularly important where a submission addressed multiple issues within the same section of text. Early coding and team discussions were used to check whether codes were being applied consistently. Where needed, the coding framework was clarified before the analysis progressed to the synthesis stage.

Submissions preparation and dataset organisation

A total of 76 submissions were received and included in the analysis. No weighting was applied to any submission. Before coding began, submissions were categorised by organisation type and assigned analytical variables. Categorisation was informed by discussion with policy colleagues. The analysis shows that some organisations operate across multiple sectors or functions. For analytical purposes, each submission was assigned to a single category based on the organisation's primary role or focus on the context of the Call for Submissions. This enabled consistent analysis across respondent groups without changing the weighting given to any individual submission. This supported comparison across respondent groups without changing the weight given to any submission.

In addition to organisational categories, a set of analytical variables was developed to support systematic review of the dataset. (see annex B)

These classifications enabled coded material to be filtered, reviewed, and compared across submission groups. They also provided a clear record between individual submissions; coded extracts and the themes developed during later stages of analysis.

Quality assurance

Quality assurance was undertaken as an ongoing and integrated part of the analytical process rather than a single stage. This helped maintain consistency and ensure findings were grounded in the submitted material.

Early in the analysis, a small sample of submissions was reviewed independently by two KAS analysts. The purpose of this exercise was to support initial calibration of the coding framework by testing the clarity and application of codes across submissions that varied in content and focus. Coding decisions were then compared and discussed to identify any ambiguities in interpretation, refine the application of the codebook and establish a consistent analytical approach before coding progressed across the wider dataset. This formed part of a broader quality assurance process that also included regular team discussions, review of coding outputs and scrutiny of emerging findings throughout the analysis.

Coding process

All submissions were imported into qualitative analysis software (MaxQDA), a qualitative analysis software package used to organise and code text and coded using the agreed analytical framework. Each submission was read in full to ensure that coding reflected the full context of each response rather than isolated excerpts.

Coding was undertaken at the level of meaningful units of text, typically capturing complete ideas, arguments or propositions. This approach was used to avoid fragmenting the points made in submissions and kept enough context for later analysis. Very large sections of text were not coded where this would have limited analytical precision.

Inclusion and exclusion criteria were applied consistently throughout the dataset to guide coding decisions. Where submissions addressed multiple issues within a single extract, segments were coded to more than one relevant code to reflect the interconnected nature of stakeholder views.

Throughout coding, regular team discussions were held to review emerging issues and early coding outputs, to clarify the application of codes, to ensure alignment in interpretation and provide additional scrutiny and identify any areas requiring refinement.

Preliminary findings were shared with the wider project team, to test interpretation and identify any gaps or misclassification in the coded data. Where code refinements were identified as necessary, all assigned coded extracts were reviewed in full by two analysts with any identified misclassifications reassigned as required.

All reviews to the codebook were followed by updating the inclusion and exclusion criteria. The updated framework was then applied consistently to the remaining dataset.

Data synthesis and theme development

Following coding, all coded segments were exported and organised by parent and child code to support systematic synthesis of the evidence. Analysts reviewed the coded material in each category to identify recurring issues and differences in emphasis.

Initial summaries were produced for each parent code by collating coded segments and removing repetition. These summaries were then checked against the underlying data to confirm that they accurately reflected the content and emphasis of submissions. This helped retain a link between the original submissions, coded extracts and the findings.

Microsoft Copilot, an AI-assisted tool was used to support the synthesis of large volumes of coded data by generating draft summaries from grouped coded segments. To support this, a tailored Copilot prompt was developed and refined to provide a clear and consistent analytical framework for summarising evidence. The prompt required outputs to use cautious language, avoid unsupported inference and remain grounded in the supplied coded material.

The tool was used only to support organisation and summarisation. It was not used to generate findings independently. Human analysts retained full responsibility for reviewing, editing and validating all outputs. All AI-generated summaries were checked against the original coded material and revised where necessary to ensure accuracy, balance, clarity and appropriate representation of stakeholder views.

Following synthesis, similarities and differences across submissions were examined systematically. Comparisons were undertaken using the analytical variables developed during dataset preparation, including organisation type and sector. This enabled the identification of variation in perspectives across different respondent groups.

Themes were developed through an iterative process of reviewing and refining the summarised evidence. This involved grouping related issues, concerns and proposals into higher-level themes.

The final thematic structure was developed from the coded material. It reflects the issues raised in the submissions received.

Strengths and limitations

The analysis drew on all 76 submissions received through the Call for Submissions. All submissions were analysed using a common coding framework. The use of structured coding, ongoing quality assurance and iterative review supported consistency in the analysis. The approach also provided a transparent link between the evidence submitted and the themes presented in this report.

The findings reflect the views of organisations and stakeholders that responded to the Call for Submissions. They should not be interpreted as statistically representative of the wider tertiary education sector. Thematic analysis is intended to identify patterns and perspectives within qualitative evidence rather than measure the prevalence of views.

The analysis did not independently verify the factual claims made in submissions. As the coding framework followed the structure of the Call for Submissions, issues outside that structure may have received less attention.

Some submissions provided extensive organisational or sector-wide evidence, while others focused on specific local, operational or issue-based concerns. This variation reflected the different roles, resources and perspectives of respondents. As a result, submissions varied in length, scope and level of detail, and some issues may have received more detailed coverage because of the nature of the evidence submitted. The analysis therefore considered the substance and relevance of each point, rather than treating longer or more detailed submissions as carrying greater weight.