**MINUTES AND ACTIONS**

**14 NOVEMBER 2018**

**12.00 – 3.30pm**

**Attendees**

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| Professor Phil Brown | Peter Sueref |
| Richard JonesBerndt Muller | Tegid RobertsKieron Rees  |
| Mark John | Jacob Ellis |
| Marsha Ward | Gail Evans |
| Rob Ashelford |  |
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**Actions**

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| **#** | **Action** | **Lead** | **Completion by** |
| 1 | Gail to share details of the Ministerial meeting with Panel members with the opportunity of attending to support Phil. | Phil Brown | Completed |
| 2 | Slide 3 - **4th industrial revolution** Panel to consider high tech digital innovation case studies - Wales based and internationally focused. | All | ASAP to ensure these are factored into final report |
| 3 | Slide 4 **- Race between Education and Technology** next meeting to focus on 'supply' and lifelong learning agenda. | Matt Hicks | Complete – meeting arranged for 30 January 2019 |

**Minute**

1. **Chair’s Update**
	1. Phil provided a short update on progress relating to the Interim Report and the need to focus on developing work streams. Discussions now need to take place not only within Welsh Government (WG), but also with external stakeholders to understand how best to move forward. A TED style / YouTube approach was discussed and this could replace a formal Interim Report. It was noted that filming could be carried out at Tramshed if required.
2. **Schedule of Work**
	1. Matt shared a forthcoming schedule of work and key dates for the next couple of months and noted the following:
* A joint Ministerial meeting will take place on 20th November focusing on the Interim Report.
* Undertake analysis of the Call for Evidence responses (extended until 30th November).
* Develop Communications and Engagement Plan – December.
* New ministerial appointments expected in December and this may impact on the timelines and reporting of the review.
* North Wales engagement and meetings - January 2019.
* Publish final report on 28th March 2019.
	1. **Action:** Gail to share details of the Ministerial meeting with Panel members with the opportunity of attending to support Phil.
1. **Presentation - Digital Wales – Transforming the Economy and the Future of Work – Expert Panel Discussion**

3.1 Phil provided a presentation and asked for panel feedback. Discussion points made in response to the presentation included:

**Slide 1 – Business as usual**

* The review is tackling similar issues to the Finance Wales Review in that the market is not working and there is a need for intervention - particularly around education and skills.
* Business as usual is not an option – further emphasis is needed on the speed of action –as the current rate in Wales is inadequate. Stop thinking and start doing.
* –There is a UK-wide tech cluster group. The role of this group is to press DCMS on the distribution of post-Brexit funding to all parts of UK. This is also a need to influence the spending review next year.
* Needs to be a role for someone (a single Minister?) to lead. Conversely joint ministerial working supports collaboration.
* 28th March date - narrative link to Brexit activity next day.
* 2019 marks the 20 year anniversary of devolution. This could be useful in selling the final report.
* Brexit doesn't change the need for digital innovation.
* Analysis of job market - do we have a sense of what future jobs/ current jobs profile looks like?
* Not just skills it's also about mindset and approach to work/self-management is key.
* The review needs to get a feel for what good quality lifelong learning/ education looks like.

**Slide 2 - What we mean by digital innovation?**

* Terminology and use of digital - perhaps need to go with wording that individuals understand.
* Non-linear angle to digital.
* Issue here is about positioning for technologies on the horizon - e.g. blockchain, 5G, quantum computing.
* Another issue is that some of the technologies listed may be too high-brow for many in Wales to understand.

 **Slide 3 - 4th industrial revolution**

* Activities cut across sectors.
* Germany model and action predates some of the 4th industrial revolution work.
* Futures perspective - are we in the 4th industrial revolution and therefore need to plan for the 5th industrial revolution e.g. around co-bots (Sony and other examples available).

**Action**: Try and bring together some case studies - Wales based and internationally focused.

* Image work on 50 industries in Wales needed - so that people can see the innovations taking place.
* Need to identify which platforms for communications work (e.g. Instagram, snapchat for young audience etc.).

 **Slide 4 - Race between Education and Technology**

* Creativity needs to be included in the list given its role in cutting across a number of areas and allowing other skills to be applied in an innovative way.
* Link to curriculum reform and thread of digital throughout education system.
* Need to consider education more broadly than just compulsory education.
* Issue about nobody owning lifelong learning in Wales.
* Possibility to talk to CollegesWales about this - Gower College mentioned (by Mark).

**Action**: next meeting focused on 'supply' and lifelong learning agenda.

* Challenge isn't always about the curriculum content - it's the (funding) structures which can act as a barrier - post-Diamond results showing a potential increase in part-time learning.
* Black Mountain College - future generations lens - holistic students and holistic approaches - Live Lab approach.
* Have we moved forward with online learning? Potential role for things like Lecture capture in supporting individuals in the middle of the education spectrum.
* Conduit to go back to Ministers with ideas following recent visit to Tramshed Tech (via Eluned Morgan).

 **Slide 5 - How should Wales respond the 4th industrial revolution?**

* Foxconn example given - automation has significantly impacted on their plant development and location.
* Potential for jobs market to split into different parts: super educated, block of automation followed by the low-skilled (who will require basic income support) - this has implications for employment in Wales.
* Maturity of companies a potential driver - smaller and younger firms are potentially more agile.
* Technology being used to "take the robot out of people" - the aim being to put more work through the individual.

 **Slide 6 - Are robots taking our jobs?**

* Peter has case studies which can present different angles on this - e.g. around Chat Bots - using technologies to enhance but not necessarily replace - similar to the Lloyds visit.

 **Slide 7 - Graph on replacement jobs**

* No comments.

**Slide 8 - Projected Change in Employment**

* Disagreement on some of the underlying figures - wholesale and retail identified as one - are these figures realistic?

 **Slide 9 - Expansion/ Replacement Demand Charts**

* Issue of confidence in the market - whether can expand or contract.
* Interesting to map the figures against salary levels and size of companies - FSB data noted as potentially being of used here - are these the right jobs for Wales?

 **Slide 10 - How should we interpret the evidence?**

* Future trends not being captured which aren't labour market orientated - e.g. climate change, older workers/ people etc.
* Deliveroo’s very recent report on automation and workforce might be a useful read.
* Low-skilled jobs - Bank of England report - shift in investment to R&D/ capital from cheap labour.

 **Slide 11 - Wales 4.0**

* Digital supply chain in Wales and what that looks like.
* Include Next Generation Services on to diagram? Option for us to come up with a handful which capture a range of interconnected activities across the economy.
* Narrative needs to be clear to ensure the public understands what it means - e.g. agri-tech in mid-Wales. Tramshed Tech looking at tech hubs in other parts of Wales.
* Similar to (or aligned with) 'Grand challenges', as a potential way of structuring.
* Tramshed Tech doing an AI Roadshow.
* Coal-mining about 1 technology with 1 aim - data-mining far more complex.
* Helps to project Wales into external markets and allows internal constituents to reflect on what it means to them. We may need to just see what we learn as we build on the idea/concept.

 **Slide 12 - Diagram**

* Lack of strategic thinking within WG on these issues.
* Critical point given restructuring conditions within WG which are ongoing and still unresolved.
* Lack of understanding of the technology.
* Richard's comparison to a large company - question of how you make it happen? What are the 'engine rooms' to make things happen?
* 22 Local Authorities who 'should' have an idea of the job opportunities/ labour market in their localities.
* General feeling that there is a huge amount of duplication in the system.
* OBR as a comparison of an arms-length arrangement from Government.
* Yes there are existing services in place, however the key is this is a 'dynamic' operating model.
* On the ground there's a lot of activity taking place despite this model not being in place - bottom-up aspect is missing right now.
* Without political mandate there is a risk that models like this sit and gather dust.
* Stakeholders need to feel that the system is working for them.
* Richard's point regarding the triple-helix of skills, capital and infrastructure - do we have all of these things and to the scale required?

 **Slide with Workstream Diagram**

* Digital infrastructure critical.

Local authorities looking seriously at 5G capability and testbed.

* Issue of lots of 'little' initiatives - potentially being done out of frustration at a lack of national outlook (similar to point above about things being done despite the system).
* Need for a national strategy.
* Microsoft working across local authorities as a technology platform.
* Currently blunt instruments by government doing lots of low impact things at a slow pace- business support as an example.
* Need for individual Civil Servant leads to support the delivery of these areas - should be a key point to be made to ministers.
* Eluned Morgan made the point during her visit to Tramshed Tech about need to scale things up - e.g. Software Academy, why not have another 5 of these across Wales?
* Need to incentivise SME market to draw in workforce to repurpose skills - e.g. payment into a lifelong learning pot. However, there are already existing concerns from employers about the Apprenticeship Levy.
* Cardiff University - payments available for 2nd/3rd year students to go into the workforce for short periods, irrespective of their learning programmes.
* What do we mean by 'Digital related Fields'? E.g. Graduate Start Ups noting the need for multi-disciplines, not just data science graduates to support their business models.
* Potential link to Flexible Skills Programme (run by WG) which could support cross-industry skills initiatives.

 **Other points**

* Could we not outline a 'do nothing' scenario?
* Singapore and China leap-frogged because they had the political will to deliver what was needed.
* Is this something just for WG or should we be looking at the relationship with Westminster governments.
* Useful to map workstreams/ideas against Andy Westwood's slide on Wales-UK policy relationships.
* Issue of what happens to Structural Funds and replacements to them in terms of Shared Prosperity Funds.
* UK Tech Cluster engaging with AI Team in UK Government/DCMS. How do we bring the facts about Wales into these conversations?
1. **Communications and Engagement**

4.1 In terms of PR, Matt informed the panel that he was working with a PR agency to work alongside the review and focus on key themes/ recommendations from the Interim Report. Matt noted that partnership working will be key - pooling of resources and where we can combine resources.

1. **AOB**

5.1 The following points were noted:

* Ministerial meeting will take place on 20 November.
* Call for Evidence Consultation (extended until 30th November) - Matt asked the Panel to promote where possible. Tramshed Tech offered to publicise on their twitter platform.
* Phil stated that we have a challenging programme leading up to the final Report and there is opportunity for Panel Members to contribute and provide feedback.
* Future Expert Panel Meetings will take place in January, February and March.
* Phil asked the panel to feed into case studies as this is critical to positioning our messages.