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Global Wales (III) Evaluation

Inception Stage Evaluation

Executive Summary



 **Taith**

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Introduction

Global Wales III provides a strategic, collaborative approach to international HE and FE in Wales. Delivered by Universities Wales, it builds on two previous phases, the first of which was launched in 2015 as a small-scale pilot by the Global Wales Partnership (which included British Council Wales, the Higher Education Funding Council for Wales and the Welsh Government) to work collaboratively to boost Wales' international profile, build networks and partnerships and support increased international recruitment, targeting four priority markets: North America, India, Vietnam, and Europe.

This third phase is funded through Taith, a £65 million all-Wales programme that is primarily concerned with funding external organisations to undertake international exchange activities. Building on previous phases, Global Wales III represents a marked increase in investment and has four objectives:

1. Increase student numbers from priority international markets.
2. Maintain and grow partnerships in priority international markets.
3. Generate additional export earnings from priority markets.
4. Increase the awareness and reputation of Welsh universities and FE colleges in priority markets.

Wavehill were commissioned in August 2023 to conduct an inception stage evaluation of Global Wales III as part of the overarching evaluation of the Taith programme. A specific report has been developed for Global Wales III which seeks to establish the theory of change for the programme, develop an evaluation framework for subsequent stages, and provide an initial assessment of delivery performance. Building on this, a Stage 2 final evaluation will be delivered by October 2025 to assess whether Global Wales III has delivered the intended outputs and outcomes.



Supporting evidence

Global Wales III contributes to a range of strategic Welsh Government priorities, particularly in relation to Wales' International Strategy which set out three core ambitions: to raise Wales' profile on the international stage, increase exports and attract inward investment, and establish Wales as a globally responsible nation. The latter links with one of the wellbeing goals outlined in the Wellbeing of Future Generations Act, whilst there are clear links with creating a prosperous Wales too. There are strong synergies with the Curriculum for Wales where supporting learners to become 'ethical, informed citizens of Wales and the world' is one of the key purposes.

Our review of the wider research literature shows that international education has proved to be a major contributor to soft power goals and has emerged as an important part of public diplomacy that has created many advantages. Programmes such as Global Wales III can have valuable educational-related soft power impacts through FE and HE's role in supporting international export and trade (primarily through the number of international students studying in Wales). That said, research commissioned by the British Council into Wales' soft power revealed mixed results – while Wales performed relatively well in some fields, the nation was ranked seventh out of ten in education. Further, HESA data reveals that the Welsh HE sector has consistently had fewer international students relative to the rest of the UK as a proportion of all students studying in the respective geographies.

The benefits of promoting international students go beyond simply the economic contributions. Global Education Partnerships can also be used as a tool for promoting diplomatic relations between countries. Examples include initiatives that promote joint research projects, academic partnerships, collaborations between universities, and providing aid for infrastructure, teacher training and curriculum development. They can also help build positive relationships, improve educational outcomes, promote economic development, foster cultural understanding, and create opportunities for people from different countries to learn from each other. When used strategically, it can be a powerful tool for promoting diplomatic relations and achieving national interests.

Monitoring Review

A series of 17 recommendations are made in our detailed review regarding the changes that should be made to current monitoring processes. These have been synthesized into two points:

- Ensure that data collection tools are designed to support programme evaluation

The review noted that a number of the data storage tools were a collation of both programme outputs / KPI progress and financial information and designed to be used for multiple purposes meaning that consideration had not necessarily been given to the ease of accessing or measuring project outputs. It would be useful to separate these functions by creating separate, streamlined and purpose-built tools/systems for each one.

- Improve consistency of data capture and alignment with Theory of Change

In some areas, the quality of some of the data captured is impacted by a lack of consistency and alignment with programme targets and the Theory of Change. Variations in target interpretation and evidencing for some indicators mean that the programme runs the risk of counting outputs that do not in reality contribute to targets. More precise definitions should be established to ensure high-quality, sufficiently detailed data collection. Alongside this, all data collection tools and processes should be supplemented by clear guidance, and consistent terminology should be used across documents to ensure clarity.

Theory of Change

A Theory of Change has been developed for Global Wales III to support the development of the Evaluation Framework. It does this by summarising what the programme is attempting to achieve as its end goal, what type of outcomes would be needed in the interim to achieve that goal, and thus what indicators can be used to measure success.

Rationale				
<ul style="list-style-type: none"> To boost Wales' international profile, build networks and partnerships and support increased international recruitment. This responds to the benefit from institutions within the HE and FE sectors in Wales working collectively to promote the sectors' interests abroad. It is needed to generate greater export earnings for the sectors, who have been operating in an economically challenging period. It is also intended to generate soft power benefits for Wales by raising the nation's standing in key priority markets. 				
Inputs & Resources				
<ul style="list-style-type: none"> £10,280,000 funding and a team of 17 staff Pre-existing infrastructure, partnerships and systems Input from Colleges Wales, British Council, the Welsh Government, universities and colleges who sit on the Global Wales Board 				
Activities	Outputs	Intermediate outcomes one	Intermediate outcomes two	Overall impacts
<ul style="list-style-type: none"> Strands 1-4 – Priority market (Research and market scoping, Partnership activity, Student recruitment activities, Research project funding and educational export) 	<ul style="list-style-type: none"> Number of events completed Number of participants involved Number of Tier 1 & 2 Influencers met Number of new potential partnerships scoped Number of existing partnerships supported Number of connections active Number of SiW impressions, website visits, video views and leads to digital marketing campaign. 	<ul style="list-style-type: none"> New ideas, research and innovation Academic and professional links Number of new formal partnerships brokered/facilitated Improved student recruitment from priority markets 	<ul style="list-style-type: none"> Ability to participate in international programmes Improved teaching and learning Reputation and international standing Delivery against civic mission Increased export earnings 	<ul style="list-style-type: none"> HE and FE institutions develop greater financial sustainability Improved Wales' profile globally Improved educational

<ul style="list-style-type: none"> • Strand 5 – Study in Wales • Stand 6 – Scholarships. • Strand 7 – Operations. 	<ul style="list-style-type: none"> • Number of posts/articles, impressions and engagements, website visits to social media and comms and number of new followers of SiW and Global Wales profiles/pages • Number of scholarship applications submitted and awards made • Funding leveraged through partnerships, systems engagement, scholarships etc. 	<ul style="list-style-type: none"> • % of international students that recall engaging with SiW • Number of new systems to systems connections achieved. 	<ul style="list-style-type: none"> • Additional Funding leveraged through partnerships, systems engagement, scholarships etc. • Seed-funded projects develop into longer-term services / products. 	<ul style="list-style-type: none"> offer in Wales • Global Wales becomes embedded in the educational landscape.
Assumptions		Barriers	Facilitators	
<ul style="list-style-type: none"> • That the Global Wales priorities aligns with the priorities of HE and FE institutions and adds value to their activity (e.g. in recruiting international students). • That the priority markets targeted want to engage with the Welsh HE and FE sectors or can be persuaded to. • That the Global Wales activity provides a positive reflection of Wales, thereby leading to reputational benefits and soft power outcomes. • That the campaigns run by SiW can make a difference in attracting international students. • Beneficiaries will embed learning within organisation and share learning with others. 		<ul style="list-style-type: none"> • Failure to serve the interests of the HE and FE sectors and different institutions within those sectors. • Perception that the programme is dominated by HE interests. • Risk of duplication – in terms of universities’ own recruitment activity, the Study UK campaign, and the international engagement work undertaken by the British Council. • Potential for the above to lead to mixed messaging and thereby having an adverse impact on each other’s campaigns and engagement work. • Failure to embed knowledge within institutions and disseminate to the sector more broadly to maximise the benefits for Wales from the international engagement activity. 	<ul style="list-style-type: none"> • Effective engagement with Welsh HE and FE representatives to obtain their input in order to deliver a programme that represents their interests as effectively as possible. • Close collaboration with key stakeholders through the Global Wales partnership and direct relationships to ensure the work complements and adds value to other activity. • Beneficiaries are encouraged / mandated to produce outputs and share information with other organisations within the sector. 	

Evaluation Framework

The Framework presented below demonstrates how each evaluation objective and question will be addressed in subsequent phases by presenting the indicators that will be used and how relevant data will be collected.

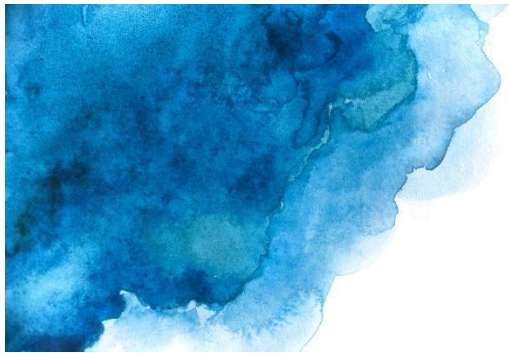
Evaluation Focus	Sub Questions	Indicators	Methods / Data Sources
Management and delivery processes	<ul style="list-style-type: none"> • Are management and delivery processes effective? How could they be improved? • To what extent, and how, is Global Wales (Phase 3) working and being delivered as intended, and what delivery lessons have been learned? • How effective has the integration of FE been? • Do monitoring systems provide sufficient support for project delivery and evaluation? How can they be improved? • Are communication activities effective? • Is the project’s staffing effectively and appropriately resourced? 	<ul style="list-style-type: none"> • Progress against programme objectives and outcomes • Staff satisfaction with management and delivery processes (e.g. resource adequacy, efficiency of systems etc.) • Stakeholder satisfaction with management and delivery processes • Beneficiaries / partners satisfaction with their GWIII experience • Beneficiaries / partners whose GWIII experience met/exceeded expectations. 	<ul style="list-style-type: none"> • Review of project documentation • Review of progress towards milestones and deliverables • Review of management information • Stakeholder interviews • Delivery and management staff interviews • Grant recipient / partner consultations.
Outputs	<ul style="list-style-type: none"> • Have the desired targets and outputs been delivered? What barriers and facilitators have affected delivery of these? • How effective is Global Wales (Phase 3) in supporting, establishing and building on international education and research partnerships in its priority markets? 	<ul style="list-style-type: none"> • Projects, reports, initiatives, and events led, organised, attended, or sponsored by Global Wales <ul style="list-style-type: none"> ○ Number of events completed ○ Number of participants involved ○ Facilitation of sector participation • Scale of engagement with influencer networks, including alumni 	<ul style="list-style-type: none"> • Review of management information • Stakeholder interviews • Grant recipient interviews.

Evaluation Focus	Sub Questions	Indicators	Methods / Data Sources
	<ul style="list-style-type: none"> • How effective is Global Wales (Phase 3) in supporting international student recruitment specifically? • Has the Study in Wales brand and associated marketing activity been successful in supporting an increase in the profile of Welsh HE and FE in priority markets? • Have the Global Wales (Phase 3) scholarships supported an increased profile for the HE sector in priority markets? • Has the programme been successful in leveraging input and buy-in from the HE and FE sectors in Wales and from GW partner organisations? If not, why not and what more could be done to achieve this? 	<ul style="list-style-type: none"> ○ Number of Tier 1 Influencers met ○ Number of Tier 2 influencers met • Partnerships brokered, facilitated or supported through Global Wales <ul style="list-style-type: none"> ○ Number of new formal partnerships brokered/facilitated ○ Number of new potential partnerships scoped ○ Number of existing partnerships supported • System-to-system connections brokered, facilitated or supported through Global Wales <ul style="list-style-type: none"> ○ Number of new connections achieved ○ Number of connections active • Study in Wales (SiW) digital marketing campaigns <ul style="list-style-type: none"> ○ Number of SiW impressions ○ Number of SiW website visits ○ Number of SiW video views ○ Number of SiW leads • Scholarships <ul style="list-style-type: none"> ○ Number of applications submitted ○ Number of awards made • Additional Funding Leveraged <ul style="list-style-type: none"> ○ Funding leveraged through partnerships, systems engagement, scholarships etc. 	

Evaluation Focus	Sub Questions	Indicators	Methods / Data Sources
Outcomes and impact	<ul style="list-style-type: none"> • What have been the experiences of organisations, both Welsh HE/FE institutions and international/external institutions participating in Global Wales (Phase 3)? • What outcomes have been experienced by individuals (students) participating in Global Wales (Phase 3) e.g. via being awarded a scholarship? • What outcomes have been experienced by higher and further education institutions? • To what extent can impacts be attributed to Global Wales? • Is there any evidence of deadweight, leakage or displacement? • Have there been any unintended additional/ supplemental benefits or consequences arising from Global Wales (Phase 3) activities? • What are the costs/ benefits of the activities provided by Global Wales (Phase 3)? • Based on the overall, estimated impact of – Global Wales (Phase 3) considering those impacts which can be given market and non-market values – compared to the 	International student recruitment in priority markets <ul style="list-style-type: none"> • No. of international students from priority markets applying to Welsh FE/HE Institutions • No. of international students from priority markets enrolling to Welsh FE/HE Institutions • SiW website visits and click-through to individual university / college website (i.e. successful conversions) • % of prospective / newly enrolled students surveyed from priority markets that are aware of / used the SiW website • Increase in familiarity with Welsh universities among prospective students surveyed from priority markets • % of newly enrolled students surveyed from priority markets reporting that SiW played an important role in influencing their decision to study in Wales • Stakeholder perceptions on enhanced awareness/competitiveness of Wales as a study destination • Stakeholder perceptions on GWIII role in increasing student recruitment • Uptake in GWIII scholarships • Experience of participants undertaking GWIII scholarships. 	<ul style="list-style-type: none"> • HESA student data • University stakeholder interviews • Interviews with Scholarship participants • SiW analytics • Commissioned research including surveys of prospective / newly enrolled students from priority markets • Review of programme MI data • Partner / beneficiary consultations.

Evaluation Focus	Sub Questions	Indicators	Methods / Data Sources
	<p>overall cost of delivering the programme, to what extent does Global Wales (Phase 3) represent value for money?</p>	<p>Grow and maintain partnerships in priority international markets</p> <ul style="list-style-type: none"> • No. of new research projects in priority markets • No. of new collaborative projects in priority markets • No. of research outputs from collaborations in priority markets • Additional funding (£) leveraged through partnerships / systems engagement • No. of seed funded projects developed into longer-term services • Stakeholder perceptions on value created as a result of new partnerships • Project specific economic, social and environmental impacts generated. <p>Generate additional export earnings for Wales from priority markets</p> <ul style="list-style-type: none"> • Growth in university income resulting from international students from priority markets • Growth in exports resulting from partnerships/projects funded through GWIII • Stakeholder perceptions on the role of GWIII in any increased revenue. 	

Evaluation Focus	Sub Questions	Indicators	Methods / Data Sources
		<p>Increase the awareness and reputation of Welsh universities and further education colleges in priority markets</p> <ul style="list-style-type: none"> • Increase in international students enrolling at Welsh FE/HE institutions • Awareness of Wales as a study destination amongst prospective students in target markets • Stakeholder perceptions on the role of GWIII in increasing awareness and reputation of Welsh HE/FE. 	



Conclusions and Recommendations

Evaluation planning

Whilst our review of the monitoring data shows that Global Wales has generally been effective in capturing output data, we have made several recommendations to strengthen the programme's approach moving forward, with 17 recommendations in total for the programme.

Recommendation 1

The Global Wales III team should review the long list of recommendations made as part of our monitoring review and implement improvements where possible.

Delivery performance

Whilst the main emphasis at this inception stage has been to plan the evaluation, we were also able to draw on some emerging themes from the stakeholder consultations and monitoring review to provide an initial assessment of delivery performance.

The programme has performed well against its KPI targets and there is some evidence to suggest that it has generated a positive return on investment. Equally, whilst generally positive, stakeholders highlighted some areas for improvement.

Questions around the added value of the programme and complementarity with other organisations will need to be explored in much greater detail during the interim phase, particularly with regards to HE and FE institutions' perspectives on the perceived value gained from the programme.

The inception evaluation revealed some apparent misunderstanding among stakeholders regarding the programme's role in relation to Study in Wales and some of the differences with other bodies such as the Global Wales partnership. We also note that the programme has commissioned research that provided encouraging findings about the outcomes achieved, and yet stakeholders appeared to be unaware of these (although we note that the programme team did disseminate the reports to the Global Wales Board and other groups).

Recommendation 2

The Global Wales III team should ensure that the added value it provides is clearly communicated with stakeholders to ensure that it continues to receive support going forward.

Perceptions around the effectiveness of stakeholder engagement varied substantially, with some finding the programme to have been effective in their communications and collaboration, whilst others noted that they had not been engaged effectively at all. Together, these findings suggest a need to strengthen communications and clarify the role of each partner, with one suggesting that a Memorandum of Understanding would be beneficial. The findings also suggest that effective stakeholder engagement could be delivered more consistently.

Recommendation 3

The Global Wales III team should engage with key stakeholders who deliver similar activities to agree on clear boundaries and thereby ensure stronger integration and coordination. As part of this, the team should consider developing an MoU with those partners.

There have been concerns among some key FE stakeholders regarding the incorporation of their sector into the programme and the level of focus on their needs, with a desire for greater influence over the programme's delivery and strategic direction. Whilst the programme have taken steps e.g. to ensure the sector is represented on the Board and have a dedicated resource and strategy focusing on FE, they have found it difficult to meet the expectations of those FE stakeholders.

Recommendation 4

The Global Wales III team should consider whether any further steps can be taken to ensure that the FE sector has a greater input with regards to the delivery and strategic direction of the programme through a co-production approach.

Finally, the main challenge by far for Global Wales III has been to accommodate the monitoring and reporting requirements set by Taith. They believe that this has taken considerable delivery time away from the team and has caused some significant issues.

Recommendation 5

Taith should consider whether any steps can be taken to streamline the monitoring and reporting requirements, while retaining the level of scrutiny demanded by the Welsh Government. Global Wales III should consider whether steps can be taken to create more efficient processes that could help to alleviate the pressures placed on them.

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