About Jisc

Jisc is the UK’s digital body for tertiary education and research. Since our foundation in the early 1990s, we have played a pivotal role in the adoption of information technology by Welsh universities and colleges, supporting them to improve learning, teaching, the student experience and institutional efficiency, as well as enabling more powerful research.

We operate shared digital infrastructures and services for the HE, FE, skills and research sectors. This includes the Janet Network – a unique asset and a real competitive advantage for the Welsh education and research base. As one of the biggest National Research and Education Networks (NREN) in the world, it underpins the UK’s research and HE sectors, providing access to very high speed, reliable connectivity and cybersecurity.

We also negotiate sector-wide deals with IT vendors and commercial publishers; and provide impartial and sector focused advice and practical assistance for universities, colleges and learning providers.

Financial Sustainability and Investment Opportunities

Question 3: What potential challenges might Brexit pose to the financial sustainability of Further and Higher Education institutions?

In addition to the loss of ERDF capital funding which FE and HE institutions benefit from, a potential decline in the number of international students could impact institutional revenues in Wales.

According to Universities Wales, there were 16.2 per cent fewer people from nations outside the EU studying in Wales in 2015/16 compared with 2013/14.¹ The decline in international students is likely to continue once the UK leaves the EU. Indeed, UCAS figures from 2016-2017 already show a 7 per cent decrease in applications from EU students.² This could lead to a recruitment challenge in the coming years if current levels of financing are sought.

¹ [www.bbc.co.uk/news/uk-wales-42051492](http://www.bbc.co.uk/news/uk-wales-42051492)
However, there are very few universities that don’t now have an international strategy and the UK leads the world in delivering transnational education (staff, students and courses moving easily across national borders).

From a UK wide perspective, the number of HE TNE students (students studying for a UK qualification whilst based abroad) has doubled in the past decade to 700,000 students (up 17 per cent between 2012-13 and 2015-16), studying through 132 UK universities for awards in 224 countries and territories.\(^3\) Interestingly, this dwarfs the 442,000 international students studying in the UK.\(^4\) In Wales, we estimate that HE intuitions supported approximately 25,000 TNE students in the 2015-16 academic year.\(^5\)

In the 2014-15, TNE had an estimated value of £550m to the UK economy. In the biggest markets for UK TNE (including Malaysia, China and Singapore), online distance education constitutes 52 per cent of all provision. However, combining branch and onshore campuses, with blended learning, Virtual Learning Environments (VLEs) and considerations such as video conferencing for tutorials requires a strategic approach, and a new set of skills in planning and delivering the technological infrastructure and new pedagogies for students of 2018, and beyond.

At Jisc we are working to enhance the globalisation of the UK HE, FE and skills sector through digital support and transformation. Universities are actively pursuing international opportunities and we are supporting them.

One of the critical factors in supporting ‘mobility’ is the student experience. TNE students based in their home country expect at least an equivalent experience to those studying in the UK campus on the same course. This means not only access to the VLE, but also access to the content for the course such as library materials and e-learning resources. Providing this equivalent student experience starts with good connectivity. This has been the foundation of our TNE support programme, via our world-leading Janet network.

In addition to connectivity, content licensing is also a challenge for institutions delivering a TNE offer. Many universities have highlighted the difficulties of negotiating individual – often costly – deals with publishers for content accessed overseas. We are responding and scoping a new pilot project to develop a negotiation service to support TNE students and staff overseas based on Jisc Collections (we work on behalf of the Welsh HE and FE sector to negotiate and license high-quality digital content that meets the requirements of institutions to support academic research, teaching and learning).

\(^3\) [www.universitiesuk.ac.uk/International/Documents/The%20Scale%20of%20UK%20HE%20TNE%202015-16_.pdf](http://www.universitiesuk.ac.uk/International/Documents/The%20Scale%20of%20UK%20HE%20TNE%202015-16_.pdf)


\(^5\) [www.hesa.ac.uk/collection/c16052/introduction](http://www.hesa.ac.uk/collection/c16052/introduction)
We commissioned the Observatory on Borderless Education to survey the HE sector and understand current and future requirements to deliver TNE. From this, we believe there is a global opportunity for Welsh institutions, as demonstrated by the Department for International Trade in their move to establish a TNE sector group, of which Jisc is a member.

We note that while most Jisc FE and skills members are not seeking international opportunities yet, we know that some will be soon and there is significant demand for skills education internationally, particularly in the Middle East. We have been working with Association of Colleges and CollegesWales to better understand our FE member’s international needs.

Alongside continuing to support Welsh HE and FE TNE activities, we are supporting Welsh institutions through Brexit by working with sector bodies such as Universities UK International (UUKi), the British Council, and the UK Department for International Trade to use our position to explore options. In time, we can help with interoperability, enabling global exchange in research and education in areas such as open access, research data and library services.

We are only likely to see further internationalisation of the UK HE market as technological possibilities increase. Via our support, we aim to help ensure the financial sustainability of HE and FE institutions in Wales by helping them diversify their provision with world-class technology.

**Research and Innovation Funding and Collaboration**

**Question 5: To what extent do Further and Higher Education institutions rely on future EU research and innovation funding?**

Leaving the EU clearly has the potential to impact negatively on research income, though the UK Government will make up any shortfall in H2020 project funds after we leave and is seeking the option to fully associate the UK with the excellence-based European science and innovation programmes – including the successor to Horizon 2020 and Euratom R&T.

**Question 6: What is currently being done, and what might be done to safeguard EU research collaborations and networks in preparation for and after Brexit?**

Modern research is increasingly a global endeavour involving collaboration with overseas partners and the support of large shared infrastructure. This shared international infrastructure includes the National Research and Education Networks (NRENs) which underpin and enable the vast investments made in education and research across the world.

Jisc, as the owners and operators of the UK’s NREN, the Janet network, is continuing to foster partnerships with other NRENs in Europe. We are also looking to recast our international relationships in line with a more global outlook. For example, we continue to build collaborations with respective organisations in priority countries such as the USA, Japan, China and Australia, to name but a few.
The UK, through Jisc, is currently a member of GÉANT – the pan-European network that interconnects all European National Research and Education Networks (NRENs) including Janet. GÉANT also interconnects European networks to other world regions via a series of bilateral agreements and of programmes instigated by the EU.

GÉANT is a critical facility to research and education within the European Research Area (ERA). It provides the ability for the UK’s and other ERA researchers to share massive amounts of data across a wide range of disciplines, and to access computational facilities on a global scale. It also allows access to developing regions of the world where networks and other e-infrastructure for education and research are only now being put into place.

The critical shared international infrastructure for research will also soon include the European Open Science Cloud (EOSC) which is currently being designed to provide researchers with free at the point of use storage, management, analysis, and reuse of research data. In time, this will give participating researchers much improved access to data, services and infrastructure, and drive the improvement of research services across Europe.

Jisc is leading the UK’s engagement with the EOSC pilot\(^6\), which imagines a federated, globally accessible environment where researchers, innovators, companies and citizens can publish, find and reuse each other’s data and tools for research, innovation and educational purposes.

EOSC is fundamentally about supporting collaboration and the endeavour has global aspirations, with the European Commission already liaising with other countries around the world. However, there will be rules of participation in the EOSC and various standards and policies to be met.

We believe it would be detrimental to the competitiveness of research in Wales if the UK did not keep up with these developments and ensure UK researchers have access to EOSC services and are able to collaborate on the same terms as other European researchers.

Researchers in Wales may wish to leave the UK if the terms of research and access are better in those countries that remain within the EOSC. There are also risks that the UK’s leading research infrastructure is later not in-line with, or included by EOSC in future; and the UK will have no influence over the rules of participation. As the EOSC has the power of Europe, there is also risk that other nations, outside of the EU, will seek to collaborate with the European Commission/EU over the UK in research infrastructure, research collaboration and innovation in preference to the UK.

It will therefore be essential for Wales and the wider UK to have access to EOSC post-Brexit as it is integral to our ongoing relationships with European research. As the UK lead on EOSC, we are in dialogue with the UK Government on this issue.

\(^6\) [https://eoscpilot.eu/](https://eoscpilot.eu/)
Through our engagement with GÉANT, EOSC and other international research policy forums, Jisc is working to enable and facilitate global interoperability and shared services, while promoting openness and access, balanced with security, reliability and high-speed connectivity. This is helping to ensure that research collaboration with institutions in Wales remains highly attractive from an infrastructural perspective.