Data used in teaching funding allocations

1. The descriptions below refer to HESA data that relate to the 2024/25 academic year that may potentially be used in 2026/27 funding calculations. HEPs should note that the assumptions about what data will be included in the calculation of allocations and which allocations will be made are subject to change.

2. Assuming that for 2026/27 funding data extracted to the same specification will be used in allocations as for 2025/26, 2026/27 teaching funding allocations data will be extracted from the 2024/25 HESA student record using the methods for extracting data for 2023/24. For the Welsh medium premium, where allocations are based on the previous two years' data, additionally data from the 2023/24 HESA student record will be used. Using HESA data enables premium and per capita allocations to be calculated with the minimum need to collect additional data from HEPs.

3. HEPs will have the opportunity to check the HESA data to be used in any allocations to ensure that Medr has correctly extracted the data as further described in paragraphs 12 to 17 of the introduction.

4. HESA data are finalised and signed off before Medr receive the data, therefore HEPs should ensure that these data are reviewed and corrected during the submission process to HESA to ensure data accuracy for on-going use. All data extractions included in this annex are available through the [HESA Information Reporting Interface Service (IRIS)](#) to aid with checking through the HESA submission process. To reduce the number of separate data verifications conducted during the year, most of the returns that require sign-off via a confirmation report are being processed through IRIS. Further detail can be found in paragraphs 14 to 17 of the introduction of this circular. Data to be used in teaching funding allocations are not extracted for providers that are not funded by Medr for their HE provision.

5. If two years' data are used in the calculation of allocations, any changes made by HEPs to the first year's data in the previous year's funding round will automatically be included in the calculation, however, no further changes to the previous year's data due to incorrect reporting by the HEP will be allowed.

6. Particular care should be taken in completing the HESA fields detailed below. However, HEPs should ensure that **all** fields of the HESA student record are completed accurately and that the over-use of null, default values or not available is avoided.

Formula element of teaching funding

Credit–based teaching funding

7. Credit-based funding was allocated in 2025/26 for part-time undergraduate provision only. Funding was calculated using completed credit values associated with home students eligible for Medr funding, using 2023/24 credit value data taken from the 2023/24 EYM data extraction, and funded credit values allocated to the HEP. For 2026/27, EYM data extracted from the 2024/25 HESA record will be used to calculate funding.

8. After the grant announcement is made each year, for any credit-based funding allocations, an individualised Excel workbook is sent to each HEP showing how the funded credits were calculated in the teaching model. An example of the workbook and details of each of the steps taken in the model are available on the [Data and analysis](#) page of the Medr website.

Premium and per capita funding

9. Data used to calculate premium and per capita funding, if allocated, are extracted from the HESA student record. The descriptions below refer to 2025/26 funding methods, as the 2026/27 methods are not yet finalised, but as applied to 2024/25 data.

10. If a student is following more than one course and has two or more records fitting the criteria to be included in the calculation of the per capita or a premium allocation, the student is counted only once. On the HESA student record, this means that only one engagement of each student is kept, all other engagements for the student are excluded. This exclusion is carried out after applying all other criteria to the data, by keeping only one engagement per student identifier Student.SID on the HESA student record. Where there is more than one student course session for the engagement that is kept, data relating to the latest student course session, such as mode and level of study, is used.

11. Prior to keeping only one engagement per student, the data are sorted by mode (full-time first) and level (postgraduate first), so that if a student has multiple engagements with different modes and levels, a full-time engagement is kept in the dataset over a part-time engagement and a postgraduate engagement is kept over an undergraduate engagement. In addition, for the access and retention premium, if a student has more than one engagement with different postcodes in the entry profile, and the postcodes are in different areas, the engagement with a postcode in quintile 1 or 2 of the [Welsh Index of Multiple Deprivation](#) 2019 (WIMD19) will be used in the calculation of any postcode related aspects of the premium (i.e. any engagement with a WIMD19 postcode will be kept in preference to any other engagement). Similarly, for the disability premium, if there are multiple engagements with not all being in receipt of DSA, the engagement in receipt of DSA is given priority. For the expensive subjects premium, if a student has two engagements fitting the criteria to be included, the engagement with the earliest commencement date is kept in preference. Where module information is used in an extraction, any duplicate modules are excluded. Given that the structure of the

new student record is different to that previously collected, the method of exclusion of multiple engagements, student course sessions and modules for students is being monitored.

12. If a student is taking a course which contains years of study which do not follow the standard academic year of 1 August to 31 July, then the student will be counted once in each year of study only, and not in each academic year in which they are active. This will be done by excluding the student from the data extract for the final academic year in which they are active. For example, if a student is following a full-time three year degree course which starts in January 2023 and finishes in December 2025, the student will be active in four academic years, but will only be counted three times for the purposes of inclusion in the calculation of the premium and per capita funding allocations. They will be counted in the first three academic years in which they are active and excluded in the final academic year in which they are active.

13. In excluding those on a non-standard academic year in their final year of study, the date the student left is compared to their date of commencement. If they leave within the anniversary of the date of commencement plus two weeks then they are excluded in that academic year, unless the two week period is identifiable as a separate year of study.

14. In each of the per capita and premium funding allocations, subject to the criteria for being counted in paragraphs 10 to 13, students must be:

   • Medr fundable;
   • not incoming exchange; and,
   • active within the reporting period.

15. Additional criteria apply for each of the funding allocations and these are detailed below.

16. The extraction of data from the HESA record is carried out using a SAS program. Algorithms for 2026/27 funding allocations, based on the SAS program for each of the funding allocations are available under Funding calculations on the 'Data and analysis' page of the Medr website.

17. The criteria show the name of the relevant HESA field in the form of **Entity.FIELDNAME** with HESA derived fields of the form **Entity.Z_FIELDNAME**

Per capita funding

18. In addition to the criteria described in paragraph 14, students eligible to be included in the calculation of per capita funding are those who are:

   • undergraduate or postgraduate taught;
   • full-time or part-time;
   • studying for at least 10 credit values;
   • in any year of study.

19. Duplicate modules based on Engagement.Z_USN and Module.MODID are removed prior to application of the below criteria.

20. The following criteria applied to the HESA student record are used to extract the data:

Latest student course session	StudentCourseSession.Z_LATESTSCSMRK = 1
Medr fundable	FundingBody.FUNDINGBODY = 5017
At least 10 credit values	Module.CRDTPTS ≥ 10 (summed over all modules the student is taking)
Not incoming exchange	Engagement.INCOMINGEXCHANGE ≠ 01, 02, 03, 04
Active 01/08/24 to 31/07/25 and not in their final student course session of an engagement attending a course assumed to follow a non-standard academic year	Engagement.ENGSTARTDATE ≤ 2025_07_31 and Engagement.ENGENDDATE ≥ 2024_08_01 **or** blank **and not** Leaver.ENGENDDATE ≤ 2025_07_31 **and** Leaver.ENGENDDATE ≤ anniversary of Engagement.ENGSTARTDATE in 2024/25 plus two weeks
Full-time or part-time mode of study	StudentCourseSession.SCSMODE = 01, 02, 31
Undergraduate or postgraduate taught	Qualification.QUALCAT = all C, E, H, I, J, M codes

Access and retention premium

21. In addition to the criteria described in paragraph 14, students eligible to be included in the calculation of the access and retention premium are those who are:

- Undergraduate;
- studying for at least 10 credit values;
- part-time;
- in any year of study.

22. The following criteria applied to the HESA student record are used to extract the data:

Latest student course session	StudentCourseSession.Z_LATESTSCSMRK = 1
Medr fundable	FundingBody.FUNDINGBODY = 5017
At least 10 credit values	Module.CRDTPTS ≥ 10 (summed over all modules the student is taking)

Not incoming exchange	Engagement.INCOMINGEXCHANGE ≠ 01, 02, 03, 04
Active 01/08/24 to 31/07/25 and not in their final student course session of an engagement attending a course assumed to follow a non-standard academic year	Engagement.ENGSTARTDATE ≤ 2025_07_31 **and** Engagement.ENGENDDATE ≥ 2024_08_01 **or** blank **and not** Leaver.ENGENDDATE ≤ 2025_07_31 **and** Leaver.ENGENDDATE ≤ anniversary of Engagement.ENGSTARTDATE in 2024/25 plus two weeks
Part-time mode of study	StudentCourseSession.SCSMODE = 02, 31
Undergraduate	Qualification.QUALCAT = all C, H (apart from H0013 when Course.TTCID = 01), I, J codes, M0002 **or** Qualification.QUALCAT = M0016 **and** Course.TTCID ≠ 01

23. A retention element is included in the premium. This requires students to be categorised by year of course and length of course, and for those on one year courses, whether they were retained or not. The following coding is used to categorise students.

Determine year of course:

First year	Engagement.ENGSTARTDATE ≥ 2024_08_01 **and** Engagement.ENGSTARTDATE ≤ 2025_07_31
Second year or above	Otherwise

Determine length of course:

One year	Engagement.Z_EXPECTLENGRP1 = 01, 02, 03
Two or more years	Engagement.Z_EXPECTLENGRP1 = 04, 05, 06, 07, 08, 09
Unknown	Engagement.Z_EXPECTLENGRP1 = Z9

Determine retention status:

Retained	FundingAndMonitoring.FUNDCOMP = 01, 04
Not retained	FundingAndMonitoring.FUNDCOMP = 02

| Status unknown | FundingAndMonitoring.FUNDCOMP = 03 or blank |

24. Students are then categorised into the following four categories for funding, plus an unknown category:

- First year on one year course – retained;
- First year on one year course – not retained;
- First year of two years or more course;
- Second or further year of two years or more course.

25. Those students in the unknown category are either first years on a one year course who have unknown retention status or are first years on an unknown length course with unknown retention status. Estimation has to be used to categorise these two types of students.

26. StudentCourseSession.Z_NONSTANDARDSCS is a HESA-derived field that identifies whether the course year is contained within the HESA reporting year 1 August – 31 July. A value of '1' indicates a non-standard year.

27. For the first type of unknowns, for those already categorised as first year students on a one year course with a known retention status, the proportion in each of the two retention categories is calculated for each value of StudentCourseSession.Z_NONSTANDARDSCS. These proportions are then applied to first years on a one year course with unknown retention status. If the number of students already categorised as first year students on a one year course with a known retention status for a particular StudentCourseSession.Z_NONSTANDARDSCS value is less than 20, then the overall proportions in each of the two retention categories for part-time students at the HEP are calculated and applied.

28. A similar method is used for the second type of unknowns. For those already categorised as first year students (either on a one year course and retained, on a one year course and not retained or on a two years or more course), the proportion in each of the three categories is calculated for each StudentCourseSession.Z_NONSTANDARDSCS value. These proportions are then applied to first years on an unknown length course with unknown retention status. If the number of students already categorised as first year students (either on a one year course and retained, on a one year course and not retained or on a two years or more course) for a particular StudentCourseSession.Z_NONSTANDARDSCS value is less than 20 then the overall proportions in each of the three categories for part-time students at the HEP are calculated and applied.

29. In calculating proportions, data for engagements not included in the population, but which finished in 2024/25 after a one year non-standard academic year course starting in 2023/24 are included. These are only included in order to estimate the retention status of first years on one year courses.

30. Eligible students are further categorised in order to calculate two elements of the access and retention premium. The first element is based on students domiciled in

deprived areas and the second element is based on students from low participation areas. Each element is calculated separately and students can be included in the calculation of more than one element.

31. For the deprived element, eligible students are categorised, using the home postcode of the student (EntryProfile.PERMADDPOSTCODE), into those that come from areas that map to quintiles 1 or 2 of the Welsh Index of Multiple Deprivation 2019 (WIMD19) and those that are from other areas.

32. For the low participation element, eligible students are included in the calculation if their home postcode (EntryProfile.PERMADDPOSTCODE) is in an area where there is a low proportion of working age adults with HE level qualifications as defined by quintiles 1 or 2 of the four-UK country AdultHE measure calculated from 2021 Census highest level of qualification data.

33. Lists of postcodes in WIMD19 quintiles 1 or 2 and low participation areas are available on the ['Data and analysis' page](#) of the Medr website. More information about low participation classifiers can be found on the [Young participation by area](#) page of the Office for Students (OfS) website.

34. Additionally, the number of WIMD19 quintiles 1 and 2 students as a percentage of Welsh domiciled students is calculated in order to categorise HEPs into two bands based on the proportion of eligible students who have a home postcode in a deprived area.

    The following coding applied to the HESA student record is used to determine Welsh domiciled students:

Welsh domiciled	Engagement.Z_PERMADDPROVGRP4 = 04 **and** EntryProfile.PERMADDPOSTCODE is a valid postcode mappable to a ward in Wales using the Medr postcode database

Disability premium

35. In addition to the criteria described in paragraph 14, students eligible to be included in the calculation of the disability premium are those who are:

    - in receipt of DSA
    - studying at any mode or level of study
    - studying for at least 10 credit values for HEIs (8.3% FTE for PGR students)
    - in any year of study.

36. For HEIs, the following coding applied to the HESA student record is used to extract the data:

Latest student course session	StudentCourseSession.Z_LATESTSCSMRK = 1
Medr fundable	FundingBody.FUNDINGBODY = 5017
At least 10 credit values (or 8.3% FTE for PGR students)	Module.CRDTPTS ≥ 10 (summed over all modules the student is taking) (Engagement.Z_STULOAD_CYC ≥ 8.3)
Not incoming exchange	Engagement.INCOMINGEXCHANGE ≠ 01, 02, 03, 04
Active 01/08/24 to 31/07/25 and not in their final student course session of an engagement attending a course assumed to follow a non-standard academic year	Engagement.ENGSTARTDATE ≤ 2025_07_31 **and** Engagement.ENGENDDATE ≥ 2024_08_01 **or** blank **and not** Leaver.ENGENDDATE ≤ 2025_07_31 **and** Leaver.ENGENDDATE ≤ anniversary of Engagement.ENGSTARTDATE in 2024/25 plus two weeks
Full-time or part-time mode of study	StudentCourseSession.SCSMODE = 01, 02, 31
In receipt of DSA	StudentFinancialSupport.FINSUPTYPE = 100
Undergraduate or Postgraduate	Qualification.QUALCAT = all C, D, E, H, I, J, L, M, codes

Welsh Medium Premium

37. The Welsh medium premium is calculated using the number of credits taught through the medium of Welsh. Modules studied by students fitting the inclusion criteria, where at least 2 credits of the module are studied through the medium of Welsh are included, averaged over two years. Welsh language or literature modules are **not** eligible for premium funding, unless a HEFCW-fundable student is taking the module as part of an ITE course leading to QTS.

38. In addition to the criteria described in paragraph 14, students eligible to be included in the calculation of the Welsh medium premium are those in any year of study who are:

   - part-time undergraduate or
   - full-time undergraduate studying credits that are eligible to be included in the calculation of the expensive subjects premium or higher cost subjects premium.

39. The following coding applied to the HESA student record is used to extract the data:

Medr fundable	FundingBody.FUNDINGBODY = 5017
Not incoming exchange	Engagement.INCOMINGEXCHANGE ≠ 01, 02, 03, 04
Active 01/08/24 to 31/07/25 and not in their final student course session of an engagement attending a course assumed to follow a non-standard academic year	Engagement.ENGSTARTDATE ≤ 2025_07_31 **and** Engagement.ENGENDDATE ≥ 2024_08_01 or blank **and not** Leaver.ENGENDDATE ≤ 2025_07_31 **and** Leaver.ENGENDDATE ≤ anniversary of Engagement.ENGSTARTDATE in 2024/25 plus two weeks
Part-time mode of study	StudentCourseSession.SCSMODE = 02, 31
If full-time, in subjects that are eligible for the expensive or higher cost subjects premiums	ModuleSubject.MODSBJ maps to ASCs 1a, 1c, 3, 4, 6 (for the higher cost subjects premium) or Modules counted in the expensive subjects premium (see extraction criteria below)
Undergraduate	Qualification.QUALCAT = all C, H (apart from H0013 when Course.TTCID = 01), I, J, M0002 **or** Qualification.QUALCAT = M0016 **and** Course.TTCID ≠ 01
At least 2 credits of module are Welsh medium	Module.MODLANGID = 01 **and** ModuleInstance.LANGPCNT x Module.CRDTPTS ≥ 2
Not Welsh language, Welsh literature or Welsh studies, unless on an ITE (QTS) course	ModuleSubject.MODSBJ ≠ 100333, 101163, 100335 **or** ModuleSubject.MODSBJ = 100333, 101163, 100335 and Course.TTCID = 01
Countable module started in the 2024/25 academic year	ModuleInstance.MODCOUNT ≠ 01 **and** (ModuleInstance.MODINSTSTARTDATE ≥ 2024_08_01

40. If modules are partly Welsh language or literature then only the part of the module that is not Welsh language or literature is counted. E.g. if a 10 credit module is

100% Welsh medium and the module subject is 50% Welsh language and 50% in another subject then only 5 credits would be counted as Welsh medium.

41.   After eligible data have been extracted, they may be subject to further manual exclusions if the modules are considered to be Welsh language or literature but have not been coded as such. However, HEPs will have the opportunity to see the exclusions during the confirmation process.

Expensive subjects premium

42.   The expensive subjects premium is calculated using the number of credits in expensive subjects for modules associated with full-time undergraduate students that fit the criteria for inclusion. If a module is returned more than once for a student, then the module is counted only once.

43.   In addition to the criteria described in paragraph 14, students eligible to be included in the calculation of the expensive subjects premium are those who are:

- full-time and sandwich
- undergraduate
- studying for clinical medicine or dentistry modules or Performance Element provision
- in any year of study.

44.   The following coding applied to the HESA student record is used to extract the data:

Medr fundable	FundingBody.FUNDINGBODY = 5017
Not incoming exchange	Engagement.INCOMINGEXCHANGE ≠ 01, 02, 03, 04
Students studying 3% or more FTE	Engagement.Z_STULOAD_CYC ≥ 3
Full-time and sandwich	StudentCourseSession.SCSMODE = 01
Undergraduate	Qualification.QUALCAT = all C, H (apart from H0013 when Course.TTCID = 01), I, J codes M0002 **or** Qualification.QUALCAT = M0016 **and** Course.TTCID ≠ 1
Completed countable modules that started in the 2024/25 academic year	ModuleInstance.MODULEOUTCOME = 01, 02 **and** ModuleInstance.MODCOUNT = 02 **and** ModuleInstance.MODINSTSTARTDATE ≥ 2024_08_01

Count of credits reduced for sandwich year out and partial completions	If StudentCourseSession.PLACEMENT = 01, 02 **and** ModuleInstance.MODULEOUTCOME = 02 **then** Module.CRDTPTS = 0.25 x Module.CRDTPTS Otherwise If StudentCourseSession.PLACEMENT = 01, 02 **or** ModuleInstance.MODULEOUTCOME = 02 **then** Module.CRDTPTS = 0.5 x Module.CRDTPTS

45. Credits eligible for the expensive subjects premium are then identified:

Clinical medicine and dentistry	Credits attributable to the proportion of the course which is clinical medicine or dentistry for credits associated with modules associated with courses where the first OR second returned subject of the course is clinical medicine or dentistry AND the corresponding second or first returned subject of the course IS pre-clinical medicine or dentistry If QualificationSubject.QUALSUBJECT1 = 100266, 100267, 101309, 101324, 101325, 101327, 101331, 101334, 101336, 101337, 101339 **and** QualificationSubject.QUALSUBJECT2 = 100275, 100276 **then** eligible credits=Module.CRDTPTS x QualificationSubject.QUALPROPORTION1 if QualificationSubject.QUALSUBJECT1 = 100275, 10027 **and** QualificationSubject.QUALSUBJECT2 = 100266, 100267, 101309, 101324, 101325, 101327, 101331, 101334, 101336, 101337, 101339 **then** eligible credits=Module.CRDTPTS x QualificationSubject.QUALPROPORTION2
Performance Element provision	UKPRN = 10007793 **and** Venue.VENUEID = "10007838" (Royal Welsh College of Music & Drama)

46. For more information about HECoS subject codes refer to paragraph 18 of the introduction.

Higher cost subjects premium

47. The higher cost subjects premium uses total assumed completed credit values for home fundable full-time and sandwich year out students will be taken from Tables 1a and 1b of the EYM 2024/25 return. Descriptions of how data will be extracted from the 2024/25 HESA student record are available in Annex K of the 2024/25 EYM publication.

48. Sandwich year out credits are counted as half.

49. Credits which are in the following ASCs are included in the allocation, funded at different units of funding according to which ASC grouping they are in:

Non-clinical Medicine and Dentistry	ASCs 1a, 1c
Science and Engineering and Technology	ASCs 3, 4
Mathematical Sciences, IT and Computing	ASC 6

Data used in research funding allocations

1.   Only HEIs are eligible for research funding.

QR funding

2.   Following REF 2021, the [QR funding methodology](#) has been used to calculate the QR funding allocation for 2022/23 onwards.

3.   Data used to calculate 2022/23 QR funding were taken from REF 2021 and from the 2018/19, 2019/20 and 2020/21 [HESA finance record](#).

4.   As all input data are frozen, the following description, although relating to the 2022/23 QR allocation, remains the same for the 2023/24, 2024/25, 2025/26 and 2026/27 QR allocations.

5.   Only data for UoAs which were submitted to the REF 2021 were included in the calculation of QR funding. To be included in the calculation of 2022/23 QR funding, UoAs were also required to meet volume and sustainability thresholds – more information on these thresholds can be found at the link in paragraph 2 above.

Charity income

6.   Average charity income, awarded through an open competitive process, from the three most recent years of the HESA Finance record, were used in the 2022/23 QR funding method. Charity income (open competitive process) was mapped from HESA cost centres to REF 2021 UoAs to which the institution made a submission.

7.   HEIs were requested to verify the charity income (open competitive process) data and allowed to amend the data, as the mapping provided by UKRI did not completely reflect the charity income (open competitive process) which had been submitted to REF 2021 UoAs.

Data used in the PGR training funding allocation

1. Only HEIs are eligible for PGR training funding. Data used in the calculation of PGR training funding are taken from the HESA student record. The description below refers to HESA student record data collected in 2024/25, with the 2025/26 funding methodology applied.

2. Students eligible to be included in the calculation of PGR funding are those in REF 2021 units of assessment (UoAs) that were included in the 2022/23 QR funding model.

3. The students must be:
   - home fundable
   - studying for PGR qualifications
   - not incoming exchange and
   - active within the reporting period

4. From 1 August 2021 EU domiciled new starters became ineligible for funding (Medr publication Medr/2025/07 Annex D refers). This means that only EU continuing students who started before 1 August 2021 are eligible for funding.

5. The fundability status of PGR students recorded by HEIs in the 2024/25 HESA student record is based on the regulations in place at that time. This means that there are now four cohorts of EU students (those starting in 2021/22, 2022/23, 2023/24 and 2024/25) that will be ineligible in the data used, because of their EU status as not Medr-fundable (not including students from Ireland). As the data are being used as a proxy for 2026/27, a further two cohorts of EU starters should be excluded and this is reflected in the mapping shown below. The table below is provided to give a visual interpretation of this.

		Year of data / funding						
		2021/22	**2022/23**	**2023/24**	**2024/25**	**2025/26**	**2026/27**	
Cohort	**Year 1**	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	**Start year**
	Year 2	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	
	Year 3	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	
	Year 4	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	
	Year 5	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	
	Year 6	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	

	EU students eligible for funding
	EU students not eligible for funding

6. If a student is following more than one course and has two or more records fitting the criteria to be included in the calculation of the PGR allocations, the student is counted only once. On the HESA student record, this means that only one engagement of each student is kept, all other engagements for the student are excluded. This exclusion is carried out after applying all other criteria to the data. If there are multiple engagements with different course aims the engagement with the highest level of course aim will be kept in the dataset. Where there is more than one student course session for the engagement that is kept, data relating to the latest student course session, such as mode and level of study, is used.

7. The following coding is applied to the HESA student record to extract eligible engagements. Where engagements have more than one student course session active within the academic year, all student course sessions are kept. If the portion in 2024/25 of each student course session spanning the academic year is recorded as writing up then the engagement is not eligible. If the sum of the StudentCourseSession.RPSTULOAD for all student course sessions for the academic year is 0 then the engagement is not eligible.

Medr fundable in 2026/27	EU new entrants became ineligible for home fees status in AY 2021/22, and CI/IoM all cohorts become home students in 2022/23 FundingBody.FUNDINGBODY = 5017 Except where 2019_08_01 ≤ Engagement.ENGSTARTDATE ≤ 2021_07_31 **and** Engagement.Z_PERMADDPROVGRP4 = 06 **and** Engagement.Z_PERMADDCOUNTRY ≠ IE EU domiciled starters in 2019/20 and 2020/21 are a proxy for two cohorts of EU students who will be non-fundable in 2026/27, but which are not non-fundable in the 2024/25 data.
Not incoming exchange	Engagement.INCOMINGEXCHANGE ≠ 01, 02, 03, 04
Active 01/08/24 to 31/07/25	Engagement.ENGSTARTDATE ≤ 2025_07_31 **and** Leaver.ENGENDDATE ≥ 2024_08_01 **or** blank **and** StudentCourseSession.Z_ACTSCS_CYC = 1 **and** Engagement.Z_STULOAD_CYC ≠ 0
Excluding writing up for entire academic year	StudentCourseSession.Z_STATUSSCS_CYC ≠ 04

Postgraduate research	Qualification.QUALCAT = all D codes, all L codes

8.   The students are further categorised into UoAs using SupervisorAllocation.REF2021UNITOFASSESSMENT. Where a student is split across two or more UoAs, the student is counted in each UoA at the proportion returned in SupervisorAllocation.SUPALLPROP. The UoA is then used to categorise students into subject groups which attract different levels of funding, based on Academic Subject Category (ASC). The table below shows the mapping.

Subject group	ASCs	UoAs
1	1b, 1d	1, 2, 3 (split), 4 (split)
2	1a, 1c, 3, 4, 6	3 (split), 4 (split), 5, 6, 7, 8, 9, 10, 11, 12, 14 (split), 15 (split), 24 (split)
3	All other ASCs	3 (split), 13, 14 (split), 15 (split), 16, 17, 18, 19, 20, 21, 22, 23, 24 (split), 25, 26, 27, 28, 29, 30, 31, 32, 33, 34

9.   UoAs 3, 4, 14, 15 and 24 are split across subject groups. This is done using the HECoS code of the course, returned in QualificationSubject.QUALSUBJECT. The HECoS codes of the courses the students in UoAs 3, 4, 14, 15 and 24 are taking are mapped to ASCs using the mapping in Annex E of the HESES circular and then categorised into subject group 1, 2 or 3.

10. Student FTE (taken from StudentCourseSession.RPSTULOAD) is then summed by UoA and subject group for use in the PGR training allocation.

Data provided to Coleg Cymraeg Cenedlaethol

1. Data relating to Welsh medium provision for HEIs are provided to the Coleg Cymraeg Cenedlaethol each year through a data sharing agreement. The data provided are extracted from the HESA student record and relate to students that have some Welsh medium teaching, the Welsh speaking proficiency of students and modules delivered in whole or in part through the medium of Welsh.

2. The description below relates to the 2024/25 data extracted through IRIS, and assumes there will be no difference to the 2024/25 data supplied to the Coleg. However as the data requirements of the Coleg develop, these criteria and the categorisation of data may change.

3. The following criteria are used to extract students from the HESA student record:

Standard HESA registration population	Engagement.Z_POPSR_CYC = 1

4. Those that have some teaching through the medium of Welsh are extracted using the following:

Students with at least one module with some proportion through the medium of Welsh	Module with some proportion through medium of Welsh: Module.MODLANGID = 01 **and** ModuleInstance.LANGPCNT > 0

5. These students are further categorised by subject and the corresponding subject proportions, mode of study and level of study:

Subject of the qualification	QualificationSubject.QUALSUBJECT and QualificationSubject.QUALPROPORTION
Mode of study	Engagement.Z_MODEGRP1
Level of study	Engagement.Z_LEVELGRP1

6. Students extracted using the criteria in paragraph 3 are further categorised by Welsh language proficiency with new entrants shown as a separate category:

| Welsh speaker language proficiency | LanguageProficiency.LANGPROFICIENCYID = 01

Categorised further using: LanguageProficiency.PROFICIENCYTYPE and LanguageProficiency.PROFICIENCYLEVEL |
| --- | --- |

New entrants	Engagement.ENGSTARTDATE ≥ 2024-08-01

7. The following criteria are used to extract modules that are taught in whole or part through the medium of Welsh associated with students extracted using the criteria in paragraph 3:

Modules with some proportion through the medium of Welsh	Module.MODLANGID = 01 **and** ModuleInstance.LANGPCNT > 0

8. The number of credits through the medium of Welsh and English for each module taught in whole or part through the medium of Welsh is calculated as:

Number of credits through the medium of Welsh	(ModuleInstance.LANGPCNT /100) x Module.CRDTPTS
Number of credits through the medium of English	(100 – (ModuleInstance.LANGPCNT/100)) x Module.CRDTPTS

9. These credits are categorised further by module subject and corresponding proportion, and the mode and level of the student:

Subject of study	ModuleSubject.MODSBJ and ModuleSubject.MODPROPORTION
Mode of study	Engagement.Z_MODEGRP1
Level of study	Engagement.Z_LEVELGRP1

10. Additionally, Medr are working with Coleg Cymraeg Cenedlaethol to produce a guidance document to assist providers in coding and returning Welsh medium module data to the HESA student record.

11. To aid further discussions with providers relating to Welsh medium module coding and to monitor any changes over time, a further data analysis has been carried out and the following criteria are used to extract data from the HESA student record:

Standard HESA registration population	Engagement.Z_POPSR_CYC = 1

12. Modules that have some teaching through the medium of Welsh are extracted using the following:

Module is taught through the medium of Welsh	Module.MODLANGID = 01

13. Modules are summarised into grouped categories of the percentage of the module that is taught through the medium of Welsh using:

Percentage of the module that is taught through the medium of Welsh	ModuleInstance.LANGPCNT

14. Counts of number of modules identified as being taught through the medium of Welsh, and enrolments on those modules are categorised further by module subject and associated percentage, and the mode and level of the student:

Subject of study	ModuleSubject.MODSBJ and ModuleSubject.MODPROPORTION
Initial Teacher Education leading to Qualified Teacher Status	Course.TTCID = 01
Mode of study	Engagement.Z_MODEGRP1
Level of study	Engagement.Z_LEVELGRP1

15. Where PGR delivery through the medium of Welsh is recorded on the student course session and not on modules, in addition to the coding above the following coding is applied to the HESA student record to extract the data:

PGR delivery through the medium of Welsh	StudentCourseSession.PGRLANGID = 01 And Engagement.Z_LEVELGRP2 = 01 and StudentCourseSession.PGRLANGPCNT > 0
Welsh medium credits	Estimate credits Credits = StudentCourseSession.Z_STULOADSCS x 180 / 100 Estimate Welsh medium credits Wm_credits = StudentCourseSession.PGRLANGPCNT x 100 x credits

Data used for publication and monitoring

1. Below are descriptions of some of the key publications, including data that will be published as part of Medr's responsibility to monitor equality and diversity.

Equality and diversity monitoring

2. We use HESA data to monitor the ethnicity, disability status, sex and age of students at Welsh HEPs and staff at Welsh HEIs. This is published on the Medr website: <u>Sta/Medr/02/2025: Equality characteristics of students and staff at higher education providers: 2016/17 to 2022/23</u>.

Students

3. Population at Welsh HEPs:

Standard HESA registration population	Engagement.Z_POPSR_CYC = 1

4. For the analysis of the ethnicity of students, only UK domiciled students at Welsh HEPs have been included. UK domiciled students have been selected for the analysis of ethnicity of students as recording ethnicity is not required for non-UK domiciled students. For the purposes of this analysis, the Channel Islands and the Isle of Man are considered to be part of the UK.

UK domiciled	Engagement.Z_PERMADDGRP1 = 01

5. The student population is categorised into ethnic group using the Student.ETHNIC field, into disability status using the Disability.DISABILITY field, and into sex using the Student.SEXID field and into age group using the Student.BIRTHDTE field.

Staff

6. Population at Welsh HEIs:

Contract counted within 1 December population	Contract.XPOPC01 =1
Person counted within atypical population (individuals who have **only** atypical contracts within the reporting period)	Contract.TERMS = 3 **and** Contract. MOEMP ≠ 6 for all contracts
Academic	Contract.ACEMPFUN = 1, 2, 3, 9

7. The staff population is categorised into ethnic group using the Person.ETHNIC field, into disability status using the Person.DISABLE field, into sex using the Person.SEXID field and into age group using the Person.BIRTHDTE field.

8. Summaries are shown for staff on non-atypical contracts. These summaries can also be separated into academic and non-academic staff. The proportion of academic staff on atypical contacts with an unknown ethnicity has been too high to publish statistics in the past, so we will continue to monitor this and will include a summary if this proportion improves enough.

9. For non-atypical staff contracts, full-person equivalents are counted. This means that a staff member with both academic and non-academic non-atypical contracts active on 1 December of the reporting period will be counted in both academic and non-academic staff counts in proportion to the contract FTE for these contracts.

   Example 1: a full-time staff member has two non-atypical contracts active on 1 December of the reporting period, an academic contract with a contract FTE of 80% and a non-academic contract with a contract FTE of 20%. The person is counted as 0.8 in the counts of academic staff and 0.2 in the counts of non-academic staff.

   Example 2: a part-time member of staff has two non-atypical contracts active on 1 December of the reporting period, an academic contract with a contract FTE of 35% and a non-academic contract with a contract FTE of 5%. The person is counted as 0.875 (35/40) in the counts of academic staff and 0.125 (5/35) in the counts of non-academic staff.

10. Individuals who have only academic atypical contracts within the reporting period are counted in the atypical staff counts as 1. From 2015/16 collection onwards, atypical non-academic staff are no longer included in the coverage of the HESA staff record.

11. Individuals with both atypical and non-atypical contracts are only counted in proportion to their non-atypical contracts active on 1 December in the reporting period.

   Example 3: a full-time member of staff has four contracts. They have two non-atypical contracts active on 1 December of the reporting period, an academic contract with FTE 50%, and a non-academic contract with FTE 30%. They also have a non-atypical academic contract which started in January of the reporting period with FTE 15% and an atypical academic contract with FTE 5%. They will be counted as 0.625 (50/80) in the academic staff counts and 0.375 (30/80) in the non-academic staff counts.

Race equality monitoring

12. HEFCW published analysis in its race equality monitoring report ([Race Equality Monitoring Measures 2016/17 to 2021/22](#) and [Race equality monitoring 2021/22](#)). This report takes a more in depth look than the standard equality and diversity monitoring referred to above, and uses data from UCAS and HESA staff and

student records. We monitor this data at an individual institutional level, but will publish at Wales sector level only in order not to disclose data.

13.   There are eleven sets of data to be monitored annually, grouped into four categories: pre-entry; access, retention and success – students; access, retention and success – staff; and governance.

Applicants, applications, offer rates and placed applicants

14.   For applications we will monitor:

the number, proportion, annual percentage change in number and annual percentage point change in the proportion, of UCAS applications to full-time undergraduate courses from UK domiciled applicants from Asian, black, mixed, white and other ethnic backgrounds.

15.   For applicants we will monitor:

the number, proportion, annual percentage change in number and annual percentage point change in the proportion, of UK domiciled UCAS applicants to full-time undergraduate courses from Asian, black, mixed, white and other ethnic backgrounds.

16.   For the offer rate we will monitor:

the unexplained gap between the offer rate for UK domiciled applicants to undergraduate courses for full-time UCAS applicants from Asian, black, mixed, white and other ethnic backgrounds.

17.   For placed applicants we will monitor:

the number, proportion, annual percentage change in number and annual percentage point change in the proportion, of UK domiciled UCAS placed applicants to full-time undergraduate courses from Asian, black, mixed, white and other ethnic backgrounds.

Data for applications, applicants and offer rates are from the 30 June deadline, and data for placed applicants are from the end of cycle. Sector level data are available on the [UCAS Undergraduate sector-level end of cycle data resources 2024](#) page, at the [2024 entry UCAS Undergraduate reports by sex, area background, and ethnic group](#) link at the bottom of the page.

Entrants, retention and degree outcomes

18.   For entrants we will monitor:

the number, proportion, annual percentage change in number and annual percentage point change in the proportion, of UK domiciled entrants to full-time and part-time undergraduate courses from Asian, black, mixed, white and other ethnic backgrounds.

19.   The population of UK domiciled undergraduate entrants are identified from the HESA student record as follows:

Standard HESA registration population	Engagement.Z_POPSR_CYC = 1
Entrants during 2024/25	Engagement.ENGSTARTDATE ≥ 2024-08-01
UK domiciled	Engagement.Z_PERMADDGRP1 = 01
Undergraduate	Engagement.Z_LEVELGRP1 = 02

20.   The student population is categorised into ethnic group using Engagement.Z_ETHNICGRP2.

21.   For retention we will monitor:

the unexplained gap between the proportion of entrants from Asian, black, mixed, white and other ethnic backgrounds who are present in higher education:

   a)   one year following year of entry, for full-time undergraduate UK domiciled entrants
   b)   two years following year of entry, for part-time first degree UK domiciled entrants.

22.   Years of entry 2015/16 to 2019/20 for full-time entrants, and 2014/15 to 2018/19 for part-time entrants were monitored using data collected on the HESA student record, calculated and published by HESA as UK Performance Indicators, and then disaggregated into ethnic groups. However, the UK Performance Indicators were published for the last time in 2022.

23.   We are currently reviewing information HESA supplied about the methodology for calculating the retention data and work on developing a new retention measure is underway.

24.   For degree outcomes we will monitor:

the unexplained gap in degree outcomes between students from Asian, black, mixed, white and other ethnic backgrounds, for UK domiciled students studying full- and/or part-time for:

   a)   First class honours
   b)   Upper second class honours
   c)   Lower second class honours
   d)   Third class honours
   e)   Unclassified

The population of UK-domiciled first degree qualifiers obtaining each classification are identified from the HESA student record as follows:

HESA qualifications obtained population	Engagement.Z_POPQUAL_CYC = 1
Obtained a first degree	Engagement.Z_QLEVELGRP2_CYC = 03
UK domiciled	Engagement.Z_PERMADDGRP1 = 01

25. The population of qualifiers attaining a first degree is categorised into ethnic group using Engagement.Z_ETHNICGRP2 and classification attained is identified using Engagement.Z_QCLASSGRP1_CYC.

Staff, staff terms of employment and staff grade

26. For staff we will monitor:

    the number, proportion, annual percentage change in number and annual percentage point change in the proportion, of staff from Asian, black, mixed, white and other ethnic backgrounds.

27. The population of staff are identified from the HESA staff record as those in the 1 December contract population or the atypical population and are identified as academic or non-academic as outlined in paragraph 6 above.

28. Staff are categorised into ethnic groups using the Person.ETHNIC field.

29. Summaries are shown for academic non-atypical and non-academic staff. A summary for academic atypical staff may be included depending on data quality. Numbers are either full person equivalents for those in the 1 December contract population, or counted as 1 for those in the atypical population. This is explained in paragraphs 9 to 11 above.

30. For terms of employment we will monitor:

    the unexplained gap between the proportion of staff from Asian, black, mixed, white and other ethnic backgrounds on permanent terms of employment.

31. In addition to the staff population outlined in paragraphs 28 to 30 above, terms of employment are identified using the Contract.TERMS field. Atypical staff are not employed on either an Open-ended/Permanent contract or a Fixed-term contract so are not included in this analysis.

32. For grade we will monitor:

    the unexplained gap between the proportion of staff from Asian, black, mixed, white and other ethnic backgrounds in each grade group.

33. In addition to the staff population outlined in paragraphs 28 to 30 above, grade is identified using the Contract.LEVELS field. Grades are aggregated into the following five groups:

Group 1: Senior managers	Contract.LEVELS= all A, B, C, D and E codes
Group 2: Professors	Contract.LEVELS= F1
Group 3: Management / budget responsibility, experts	Contract.LEVELS= F2, I0
Group 4: Staff responsibility, limited / no management responsibility, team budget / no budget responsibility	Contract.LEVELS= J0, K0, L0
Group 5: No staff or budget responsibility, little or no experience	Contract.LEVELS= M0, N0, O0, P0

34. For different groups of staff, there is likely to be more or less in a particular grade group therefore the data were aggregated further to avoid small cell values and the possibility of data disclosure, as follows:

Academic non-atypical	Group 1 & 2 Group 3 Group 4 & 5 Very small numbers in Groups 1 & 5.
Academic atypical	Group 1, 2 & 3 Group 4 Group 5 Very small numbers in Groups 1, 2, & 3.
Non-academic	Group 1, 3 & 4 Group 5 Professor is an academic position so non-academics are not in Group 2. Very small numbers in Groups 1 & 3.

Governance

35. For governors we will monitor:

the number and proportion of governors from Asian, black, mixed, white and other ethnic backgrounds.

36. In the HESA staff record governors are identified as follows:

Governor	Person.GOVFLAG = 1

Data provided to higher education providers in the HESA student record data quality analysis

1. The HESA data quality analysis was designed to aid improvement of the quality of the student record. Therefore a large number of the tables included in this analysis look at proportions of valid and unknown entries recorded in selected fields. Other tables look at data recently introduced to the record or at areas which have previously been known to have coding issues within the sector.

Review of IRIS Data Quality Outputs

2. During the summer of 2025 we carried out a review of the data quality analyses provided via the HESA IRIS system to ensure it is still useful and appropriate to both Medr and HEP needs.

3. In total seven HEPs responded to the review, all in general agreement with the proposals and principles presented. Some further questions of clarity were raised, but in general they applied to changes we are proposing to make to 2025/26 IRIS after carrying out further work on analysis requirements in Medr, so we will continue those conversations with HEPs ahead of preparing the 2025/26 IRIS.

4. Additionally, some concerns were raised relating to resources available in HEPs to fully scrutinise the additional tables. We will continue to support HEPs in reviewing IRIS outputs through the data submission period and in reflection through our annual Data Quality meetings, and HE student record review group meetings.

Outcome of review

5. A detailed outline of table changes for 2024/25 IRIS data extraction, new table numbers and planned changes for 2025/26 are included in Annex Q.

6. In general, all tables will now also include a time series of provider and sector totals from 2022/23 when Data Futures was introduced and building each year.

7. Some table numbers have changed to group the tables into similar themes: personal characteristics; detail of study; and outcomes.
8. Separate sheets to include individual student data will be built into 2025/26 IRIS outputs.

Extraction criteria

9. This Annex maps data quality analyses using HESA student data.

10. Currently there are 25 tables included in the analysis:

    Table 1:   Postcodes
    Table 2:   Ethnicity

11. In the majority of tables, the data are presented for HE level student engagements by mode and level as described below. Previous mappings additionally made use of the field INSTANCE.REDUCEDI to be able to exclude students who were not returned with a full student record. An equivalent field is not available for 2023/24 data, where instead coverage is included for each entity/field, and so is brought out specifically as 'Coverage' in each Table section.

Full-time	Engagement.Z_MODEGRP1 =01
Part-time	Engagement.Z_MODEGRP1 =02
Postgraduate research	Engagement.Z_LEVELGRP2 = 01
Postgraduate taught	Engagement.Z_LEVELGRP2 = 02

Undergraduate first degree	Engagement.Z_LEVELGRP2 = 03
Undergraduate non-degree	Engagement.Z_LEVELGRP2 = 04

Table 1 - Postcodes

12. The postcode prior to entry of the course for UK domiciled HE level engagements returned as meeting the coverage for the EntryProfile.PERMADDCOUNTRY postcode field is categorised into three categories, valid, invalid or missing.

Coverage	All EntryProfile entities where: EntryProfile.PERMADDCOUNTRY = XF, XG, XH, XI, XK, XL, GG, JE or IM except where: Engagement.INCOMINGEXCHANGE exists **or** (Leaver.ENGENDDATE - Engagement.ENGSTARTDATE ≤ 14 days and Leaver.RSNENGEND = 03, 05, 11, 12)
UK domiciled	EntryProfile.PERMADDCOUNTRY = XF, XG, XH, XI, XK
Valid postcode	EntryProfile.PERMADDPOSTCODE matches a postcode on the Medr postcode database
Invalid postcode	EntryProfile.PERMADDPOSTCODE does not match a postcode on the Medr postcode database and is ≠ ZZ99 9ZZ or blank
Postcode not known or missing	EntryProfile.PERMADDPOSTCODE is = ZZ99 9ZZ or blank

Table 2 - Ethnicity

13. Ethnicity for UK domiciled HE level engagements returned as meeting the coverage for the Student.ETHNIC field, is categorised into four categories, known ethnicity, unknown ethnicity, prefer not to say or not available.

Coverage	EntryProfile.PERMADDCOUNTRY = XF, XG, XH, XI, XK, XL, GG, JE, IM except where: Engagement.INCOMINGEXCHANGE exists **or** (SessionStatus. Engagement.Z_ACT_CYC = 0

	or (Leaver.ENGENDDATE - Engagement.ENGSTARTDATE <= 14 days and Leaver.RSNENGEND = 03, 05, 11, 12).
Known ethnicity	Student.ETHNIC ≠ 997, 998, 999
Ethnicity not known	Student.ETHNIC = 997
Prefer not to say	Student.ETHNIC = 998
Not available	Student.ETHNIC = 999

Table 3 - Disabled Students' Allowance (DSA)

14.   This table looks at HE level engagements returned for students with known impairments, health conditions or learning difficulties and shows whether they are in receipt of disabled students' allowance or not.

Coverage	All engagements excluding where Engagement.Z_ACT_CYC = 0 **or** (Leaver.ENGENDDATE - Engagement.ENGSTARTDATE ≤ 14 days and Leaver.RSNENGEND = 03, 05, 11, 12).
Student with known impairments, health conditions or learning difficulties In receipt of DSA	Engagement. Z_DISABILITYMRK =1
Not in receipt of DSA/not known/not sought	StudentFinancialSupport. FINSUPTYPE = 100 StudentFinancialSupport. FINSUPTYPE ≠ 100 or does not exist

Table 4 - Highest qualification on entry

15.   This table shows whether the highest qualification on entry is known or not known for HE level engagements. The data are split by full-time and part-time as described in paragraph 11 but are further split into whether or not the engagement is an initial teacher education (ITE) course leading to qualified teacher status (QTS).

Coverage	All EntryProfile entities except where: Engagement.INCOMINGEXCHANGE exists

	or (Leaver.ENGENDDATE - Engagement.ENGSTARTDATE ≤ 14 days and Leaver.RSNENGEND = 03, 05, 11, 12)
ITE (QTS)	Course.TTCID = 01
Non-ITE (QTS)	Course.TTCID ≠ 01
Known highest qualification on entry	EntryProfile.HIGHESTQOE ≠ 99999
Unknown highest qualification on entry	EntryProfile.HIGHESTQOE = 99999 or does not exist

Table 5 - Gender identity

16. This table shows whether gender identity is known, not known/not available or refused for HE level engagements.

Coverage	All Students except where: (Leaver.ENGENDDATE - Engagement.ENGSTARTDATE ≤ 14 days **and** Leaver.RSNENGEND = 03, 05, 11, 12).
Known gender identity	Student.GENDERID = 01, 02
Prefer not to say	Student.GENDERID = 98
Not Available	Student.GENDERID = 99

Table 6 - Religion or belief

17. This table shows whether religion or belief is known, not known or refused for HE level engagements.

Coverage	All Students except where: (Leaver.ENGENDDATE - Engagement.ENGSTARTDATE ≤ 14 days **and** Leaver.RSNENGEND = 03, 05, 11, 12).
Known religion or belief	Student.RELIGION ≠ 98, 99
Prefer not to say	Student.RELIGION = 98
Not available	Student.RELIGION = 99

Table 7 - Sexual orientation

18. This table shows whether sexual orientation is known, not known/not available or refused for HE level engagements.

Coverage	All Students except where: (Leaver.ENGENDDATE - Engagement.ENGSTARTDATE ≤ 14 days **and** Leaver.RSNENGEND = 03, 05, 11, 12).
Known sexual orientation	Student.SEXORT = 10, 11, 12, 19
Prefer not to say	Student.SEXORT = 98
Not available	Student.SEXORT = 99

Table 8 - Care leaver

19. This table shows whether care leaver status is known or not known for undergraduate or PGCE engagements applying through UCAS.

Coverage	All EntryProfile entities where: the student entered the Engagement via UCAS except where: Engagement.INCOMINGEXCHANGE exists **or** (Leaver.ENGENDDATE - Engagement.ENGSTARTDATE ≤ 14 days and Leaver.RSNENGEND = 03, 05, 11, 12).
Undergraduate or PGCE	Qualification.QUALCAT = All H, I, J and C **or** Qualification.QUALCAT = M0002 **or** Qualification.QUALCAT = M0016 and Course.TTCID = 01
Applying through UCAS	EntryProfile.UCASSCHEMECODE ≠ blank

20. For engagements starting between 1 August 2013 and 31 July 2014:

Starting between 1 August 2013 and 31 July 2014	Engagement.ENGSTARTDATE ≥ 2013-08-01 **and** Engagement.ENGSTARTDATE ≤ 2014-07-31

21. Or for EU engagements starting between 1 August 2014 and 31 July 2021:

EU domiciled	EntryProfile.PERMADDCOUNTRY = XL, IM, GG, JE, AT, AX, BE, BG, CZ, DE, DK, EE, ES, EU, FI, FR, GF, GI, GP, GR, HR, HU, IC, IT, LT, LU, LV, MQ, MT, NL, PL, PT, RE, RO, SE, SI, SK, XA, XC or YT
Starting between 1 August 2014 and 31 July 2021	Engagement.ENGSTARTDATE ≥ 2014-08-01 **and** Engagement.ENGSTARTDATE ≤ 2021-07-31

22.   Or for UK engagements starting on or after 1 August 2014:

UK domiciled	EntryProfile.PERMADDCOUNTRY = XF, XG, XH, XI, XL, IE, GG, JE or IM
Starting on or after 1 August 2014	Engagement.ENGSTARTDATE ≥ 2014-08-01

23.   Care leaver status is categorised:

Known care leaver status	Engagement. Z_CARELEAVER_EP = 01, 02, 03, 04, 05, 06, 07, 08, 09
Not known	Engagement. Z_CARELEAVER_EP = 97
Prefer not to say	Engagement. Z_CARELEAVER_EP = 98
Not available	Engagement. Z_CARELEAVER_EP = 99, Z9

Table 9 - Parental education

24.   This table shows whether parental education is known, not known or refused for UK, Channel Islands and Isle of Man domiciled full-time undergraduate student engagements, starting after 31 July 2008.

Coverage	All EntryProfiles except where: Engagement.INCOMINGEXCHANGE exists **or** Engagement.Z_ACT_CYC = 0 **or** (Leaver.ENGENDDATE - Engagement.ENGSTARTDATE ≤ 14 days and Leaver.RSNENGEND = 03, 05, 11, 12).
UK, CI or IoM domiciled	EntryProfile.PERMADDCOUNTRY = XF, XG, XH, XI, XK, XL, GG, JE or IM
Full-time	As outlined in paragraph 11
Starting after 31 July 2008	Engagement.ENGSTARTDATE > 2008-07-31
Undergraduate	Qualification.QUALCAT = H, I, J or C or is M0002
Known parental education	EntryProfile.PARED = 01, 02

No response on parental education	EntryProfile.PARED = 03
Not known parental education	EntryProfile.PARED = 97
Parental education prefer not to say	EntryProfile.PARED = 98
Parental Education not available	EntryProfile.PARED = 99

Table 10 – Carer Status

25. This table shows carer status for all students using the Student.CARER field, is categorised into three categories, known carer status, prefer not to say or not available.

Coverage	All students
Known carer	Student.CARER = 01, 02
Prefer not to say	Student.CARER = 98
Not available	Student.CARER = 99

Table 11 – Sex

26. This table shows the sex of all students using the Student.SEXID field, is categorised into three categories, known sex, refused or not available.

Coverage	All students
Known sex	Student.CARER = 10, 11, 12
Refused	Student.CARER = 96
Not available	Student.CARER = 99

Table 12 – Date of Birth

27. This table show the return of date of birth data of all students using the Student.BIRTHDTE field, is categorised into two categories, known date of birth or missing.

Coverage	All students
Known age	Student.BIRTHDTE exists

Missing	Student.BIRTHDTE is missing

Table 13 – Estranged

28. This table shows whether the student is estranged using the EntryProfile.ESTRANGED field, is categorised into three categories, known estranged status, prefer not to say or not available.

Coverage	All StudentCourseSessions except where: Engagement.INCOMINGEXCHANGE exists **or** Engagement.Z_ACT_CYC = 0 **or** (Leaver.ENGENDDATE - Engagement.ENGSTARTDATE ≤ 14 days and Leaver.RSNENGEND = 03, 05, 11, 12).
Undergraduate	Qualification.QUALCAT = All H, I, J and C **or** Qualification.QUALCAT = M0002
Known estranged status	EntryProfile.ESTRANGED = 01, 02
Prefer not to say	EntryProfile.ESTRANGED = 98
Not available	EntryProfile.ESTRANGED = 99

Table 14 – Language Proficiency

29. This table shows the language proficiency of all Welsh domicile students identified by return of LanguageProficiency entity, specifically where LanguageProficiency.LANGPROFICIENCYID = 01 - Welsh.

Coverage	Engagement.INCOMINGEXCHANGE does not exist
Welsh domicile	EntryProfile.PERMADDCOUNTRY = XI
Welsh Language Proficiency	LanguageProficiency.LANGPROFICIENCYID = 01
Type of Proficiency - known (to include none of above)	LanguageProficiency.PROFICIENCYTYPE = 01, 02, 03, 04, 96
Type of Proficiency - not known	LanguageProficiency.PROFICIENCYTYPE = 99

Type of Proficiency - missing	LanguageProficiency.LANGPROFICIENCYID = 01 and LanguageProficiency.PROFICIENCYTYPE missing

Table 15 – Welsh Language Proficiency by proficiency type and level

30. This table shows the language proficiency of all Welsh domicile students identified by return of LanguageProficiency entity as included in Table 14, specifically where LanguageProficiency.LANGPROFICIENCYID = 01 - Welsh.
A student can have multiple instances of LanguageProficiency.PROFICIENCYTYPE, but counts shown are against the student engagement.

Coverage	Engagement.INCOMINGEXCHANGE does not exist
Welsh domicile	EntryProfile.PERMADDCOUNTRY = XI
Welsh Language Proficiency	LanguageProficiency.LANGPROFICIENCYID = 01
Type of Proficiency - known (to include none of above)	LanguageProficiency.PROFICIENCYTYPE = 01, 02, 03, 04, 96
Multiple proficiency types (to exclude none of above)	Count of instances where LanguageProficiency.PROFICIENCYTYPE = 01, 02, 03, 04 is greater than 1
Type of Proficiency – Welsh speaker	LanguageProficiency.PROFICIENCYTYPE = 02
Proficiency level – Welsh speaking category	LanguageProficiency.PROFICIENCYTYPE= 02 and LanguageProficiency.PROFICIENCYLEVEL= 01, 02, 03, 04
Proficiency level - not known	LanguageProficiency.PROFICIENCYTYPE= 02 LanguageProficiency.PROFICIENCYLEVEL= 99
Proficiency level - missing	LanguageProficiency.PROFICIENCYTYPE= 02 and LanguageProficiency.PROFICIENCYLEVEL is missing

Table 16 - Coding of non-standard academic years

31. This table looks at how HE level engagements on a full-time Master's qualification aims are coded.

Full-time	As outlined in paragraph 11
Master's	Qualification.QUALCAT = L0000, M0003, M0004, M0006, M0007
Engagements with an expected year length of less than 40 weeks coded as being on a course that is contained within the 2024/25 academic year	Engagement.ENGSTARTDATE ≥ 2024-08-01 **and** Engagement.ENGEXPECTEDENDDATE ≤ 2025-07-31 **and** Engagement.Z_EXPECTOLENWEEK <40
Engagements with an expected year length of 40 weeks or more coded as being on a course that is contained within the 2024/25 academic year	Engagement.ENGSTARTDATE ≥ 2024-08-01 **and** Engagement.ENGEXPECTEDENDDATE ≤ 2025-07-31 **and** Engagement.Z_EXPECTOLENWEEK ≥ 40
Engagements coded on a course that is NOT contained within the 2024/25 academic year	Engagement.ENGSTARTDATE ≥ 2024-08-01 **and** Engagement.ENGEXPECTEDENDDATE >2025-07-31

Table 17 - Average FTE/credits per engagement

32. This table looks at HE level engagements returned with an active mode of study and full-time equivalence (FTE) > 0 and shows the average, maximum and minimum FTE and credits per engagement. Engagements on a sandwich year out are shown separately from other full-time engagements and dormant, sabbatical and writing up engagements are excluded from part-time.

Coverage :	All engagements except where: Engagement.INCOMINGEXCHANGE exists **or** Engagement.Z_ACT_CYC = 0 **or** (Leaver.ENGENDDATE - Engagement.ENGSTARTDATE ≤ 14 days and Leaver.RSNENGEND = 03, 05, 11, 12).
FTE > 0	Engagement.Z_STULOAD_CYC > 0
Full-time (excluding sandwich year out)	Engagement. Z_MODEGRP1=01 and StudentCourseSession.PLACEMENT ≠ 01, 02
Sandwich year out	Engagement. Z_MODEGRP1=01 and StudentCourseSession.PLACEMENT = 01, 02

Part-time (active modes only)	Engagement. Z_MODEGRP1=02 and StudentCourseSession.Z_ACT_CYC=1 except (SessionStatus.STATUSCHANGEDTO = 04 and SessionStatus.STATUSVALIDFROM < 2024-08-01)

Table 18 - Student support number

33.   This table looks at whether the student support number (SSN) is provided for full-time undergraduate or PGCE engagements, who are eligible to pay home fees or eligibility to pay home fees is not assessed and not incoming exchange. This table no longer includes only students specifically counted as in the post September 2012 fee regime as all FT UG students are now assumed to be in the same fee regime.

Coverage	All StudentCourseSessions except where: Engagement.INCOMINGEXCHANGE exists **or** Engagement.Z_ACT_CYC = 0 **or** (Leaver.ENGENDDATE - Engagement.ENGSTARTDATE ≤ 14 days and Leaver.RSNENGEND = 03, 05, 11, 12).
Full-time	As outlined in paragraph 11
Undergraduate or PGCE	Qualification.QUALCAT = All H, I, J and C **or** Qualification.QUALCAT = M0002 **or** Qualification.QUALCAT = M0016 and Course.TTCID = 01
Eligible to pay home fees or eligibility to pay home fees is not assessed	Engagement.FEEELIG ≠ 02
Not incoming exchange	Engagement.INCOMINGEXCHANGE = 01, 02, 03 ,04
SSN present	Student.SSN ≠ blank
SSN missing	Student.SSN = blank

Table 19 - Engagements where the body responsible for allocating funding is either Welsh Government, Education Workforce Council, Health Education and Improvement Wales, or Departments of Health/NHS/Social care

34.   This table looks at HE student engagements, where the body responsible for allocating funding is either Welsh Government, Health Education and

Improvement Wales, or Departments of Health/NHS/Social care by the following subject groups: Nursing and midwifery; Subjects allied to Medicine; all other subjects.

Responsible body is Welsh Government, Health Education and Improvement Wales, or Departments of Health/NHS/Social care	FundingBody.FUNDINGBODY = 5029, 5055, 5006
Subjects allied to Medicine (excluding Nursing)	Engagement.DerivedSubject.Z_SUBJCAHGRP1 =02 **and** Engagement.DerivedSubject.Z_SUBJCAHGRP2 ≠ 02-04
Nursing and midwifery	Engagement.DerivedSubject.Z_SUBJCAHGRP2 = 02-04
All other subjects	Engagement.DerivedSubject.Z_SUBJCAHGRP1 ≠ 02

35. Additionally this table includes Initial Teacher Education students where the body responsible for allocating funding is the Welsh Government or Education Workforce Council.

Responsible body is Welsh Government or Education Workforce Council	FundingBody.FUNDINGBODY = 5029, 5053
Initial Teacher Education leading to QTS	Course.TTCID = 01

36. For more information about HECoS subject codes and CAH codes refer to paragraphs 18 to 19 of the introduction.

Table 20 – Funding Body

37. This table shows the funding body returned using the FundingBody entity split by Wales specific bodies, and other, returned for the latest student course session in the academic year.

Coverage	All StudentCourseSessions except where: Engagement.Z_ACT_CYC = 0 **or** (Leaver.ENGENDDATE - Engagement.ENGSTARTDATE ≤ 14 days and Leaver.RSNENGEND = 03, 05, 11, 12).

Latest Student course session	Using derived field Z_LATESTSCSMRK= 1
Funding body - Medr	FundingBody.FUNDINGBODY = 5017
Funding body – Welsh Government	FundingBody.FUNDINGBODY = 5029
Funding body – Education Workforce Council (EWC)	FundingBody.FUNDINGBODY = 5053
Funding body – Health Education and Improvement Wales (HEIW)	FundingBody.FUNDINGBODY = 5055
Funding body – Other	FundingBody.FUNDINGBODY not = 5017, 5029, 5053, 5055 or blank
Funding body – missing	FundingBody.FUNDINGBODY is blank

Table 21 – Off Venue Activity

38. This table shows the off venue activity on latest student course sessions active in academic year using the OffVenueActivity.OVAID field, counted by number of instances where OffVenueActivity.OVAID exists. A student may have multiple instances of OVAID counted in the measure.

Coverage	All StudentCourseSessions
Latest Student course session	Using derived field Z_LATESTSCSMRK= 1
Off venue activity	Count of instances where OffVenueActivity.OVAID exists

Table 22 – Off Venue Activity by mobility scheme

39. This table shows the scheme associated with the off venue activity on the latest student course session active in academic year summarised in Table 21, shown by OffVenueActivity.MOBSCHEME. Categorised into categories as below:

Coverage	All StudentCourseSessions
Latest Student course session	Using derived field Z_LATESTSCSMRK= 1
Off venue activity	Count of instances where OffVenueActivity.OVAID exists
Mobility scheme: Provider Sandwich ERASMUS +	 OffVenueActivity.MOBSCHEME = 01 OffVenueActivity.MOBSCHEME = 02 OffVenueActivity.MOBSCHEME = 03

Turing scheme	OffVenueActivity.MOBSCHEME = 05
Taith	OffVenueActivity.MOBSCHEME = 06
Other	OffVenueActivity.MOBSCHEME = 04

Table 23 - Non-completion of latest student course session on engagement

40. This table looks at HE level engagements where the latest student course session was not completed and shows how whether the reason was leaving institution, agreed break, transferring or another reason.

Coverage	All engagements except where: Engagement.INCOMINGEXCHANGE exists **or** Engagement.Z_ACT_CYC = 0 **or** (Leaver.ENGENDDATE - Engagement.ENGSTARTDATE ≤ 14 days).
Students not completing the latest student course session (SCS)	StudentCourseSession.RSNSCSEND exists **and** FundingAndMonitoring.FUNDCOMP = 02
SCS ended due to student leaving institution	StudentCourseSession.RSNSCSEND = 01
SCS ended due to the student taking an agreed break in learning	StudentCourseSession.RSNSCSEND = 02
SCS ended due to the student transferring to another course in institution	StudentCourseSession.RSNSCSEND = 03
SCS has ended for other reason	StudentCourseSession.RSNSCSEND = 04

Table 24 - Students who did not complete the engagement and left the institution by reason for leaving

41. This table looks at HE level engagements that ended by reason for ending the engagement.

Engagement ended	Leaver.RSNENGEND = 01, 03, 05, 11, 12, 98

Left and awarded credit or a qualification	Leaver.RSNENGEND = 01
Transferred to another provider	Leaver.RSNENGEND= 03
Death	Leaver.RSNENGEND= 05
Other (left but without being awarded credit or a qualification)	Leaver.RSNENGEND = 11
Transferred out as part of collaborative supervision arrangements	Leaver.RSNENGEND = 12
Left but award of credit or a qualification not yet known	Leaver.RSNENGEND = 98

Table 25 - Outcome of module

42.   This table looks at the outcome of the module for all HE students enrolled on modules.

Coverage	All entities for each interaction a student has with a Module where Qualification.QUALCAT starts with E, M, H, I, J or C except where Engagement.INCOMINGEXCHANGE exists **or** Engagement.Z_ACT_CYC = 0 **or** (Leaver.ENGENDDATE - Engagement.ENGSTARTDATE ≤ 14 days and Leaver.RSNENGEND = 03, 05, 11, 12).
Students enrolled on modules that started in 2024/25	ModuleInstance.MODINSTSTARTDATE ≥ 2024-08-01
Module instance associated with latest student course session	Priority based on StudentCourseSession.SCSSTARTDATE
Completion	ModuleInstance.MODULEOUTCOME = 01
Partial completion	ModuleInstance.MODULEOUTCOME = 02
Did not complete	ModuleInstance.MODULEOUTCOME = 03
Taken on a not-for-credit basis	ModuleInstance.MODULEOUTCOME = 04
Result not yet known (should not be used by Welsh HEPs)	ModuleInstance.MODULEOUTCOME = 05

Outcome missing	ModuleInstance.MODULEOUTCOME = blank
Continuing to subsequent Student Course Session	ModuleInstance.MODULEOUTCOME = 06

Data used for allocating and monitoring the part-time undergraduate fee waiver scheme

Allocations

1. Data used to calculate part-time undergraduate fee waiver scheme allocations are extracted from the HESA student record. The descriptions below refer to 2025/26 funding methods, but as applied to 2024/25 data.

2. Students eligible to be included in the scheme allocations are those who are:

    - part-time;
    - undergraduate;
    - Medr fundable;
    - Studying at least 3% but less than 25% full-time equivalent (FTE);
    - Not incoming exchange.

3. The following criteria applied to the HESA student record are used to extract the data:

Active 01/08/24 to 31/07/25 and not in their final student course session of an engagement attending a course assumed to follow a non-standard academic year	Engagement.ENGSTARTDATE ≤ 2025_07_31 **and** Engagement.ENGENDDATE ≥ 2024_08_01 or blank **and not** Leaver.ENGENDDATE ≤ 2024_07_31 **and** Leaver.ENGENDDATE ≤ anniversary of Engagement.ENGSTARTDATE in 2024/25 plus two weeks
Medr fundable	FundingBody.FUNDINGBODY = 5017
Part-time	StudentCourseSession.SCSMODE = 02, 31
Undergraduate	Qualification.QUALCAT = all C, H (apart from H0013 when Course.TTCID = 01), I, J codes , M0002 **or** Qualification.QUALCAT = M0016 and Course.TTCID ≠ 01
Studying at least 3% but less than 25% FTE	3 ≤ Engagement.Z_STULOAD_CYC < 25 (summed over all engagements for the student)
Not incoming exchange	Engagement.INCOMINGEXCHANGE ≠ 01, 02, 03, 04

4.   The scheme funding allocation is based on each provider's proportion of fundable students who meet certain eligibility criteria, used as a proxy for those that may be more likely to access the scheme, who are studying in Wales.

5.   'Eligible' students are defined as students:

- with a disability; or
- from a Black, Asian or minority ethnic group (UK-domiciled only); or
- who are a carer; or
- who are a care leaver; or
- who are from an area of deprivation (Welsh-domiciled undergraduates only); or
- who are from an area of low HE participation (UK-domiciled undergraduates only); or
- with parents with no HE qualifications (UK-domiciled undergraduates only).

6.   The Welsh Index of Multiple Deprivation 2019 (WIMD19) is used to identify students from deprived areas. The proportion of working age adults with HE level qualifications (AdultHE) based on 2021 Census data is used to identify students from low participation areas.

7.   To identify students from an area of deprivation, eligible students are categorised, using the home postcode of the student (EntryProfile. PERMADDPOSTCODE), into those that come from areas that map to quintiles 1 or 2 of WIMD19 and those that are from other areas.

8.   To identify students from an area of low HE participation, eligible students are included in the calculation if their home postcode (EntryProfile. PERMADDPOSTCODE) is in an area where there is a low proportion of working age adults with HE level qualifications as defined by quintiles 1 or 2 of the AdultHE measure.

9.   Lists of postcodes in WIMD19 quintiles 1 or 2 and low participation areas are available on the 'Data and analysis' page of the Medr website (see the 'Postcode data' section).

10.   The following coding applied to the HESA student record is used to determine whether a student is considered to be 'eligible' for the purposes of allocating the funding:

From a 'deprived' home postcode	EntryProfile.PERMADDPOSTCODE maps to WIMD19 quintile 1 or 2
From a 'low participation' home postcode	EntryProfile.PERMADDPOSTCODE maps to AdultHE2021 quintile 1 or 2
From a Black, Asian or minority ethnic group	Engagement.Z_PERMADDPROVGRP4 = 01, 02, 03, 04, 05 **and** Student.ETHNIC ≠ all codes beginning 16, 17 or 99 (apart from 163 and 168)

Self-declared disability	Engagement.Z_DISABILITYMRK = 1
Carer	Student.CARER = 02
Care leaver	EntryProfile.CARELEAVER = 06, 07, 08
Parents do not have an HE qualification	Engagement.Z_PERMADDPROVGRP4 = 01, 02, 03, 04, 05 **and** EntryProfile.PARED = 02

Monitoring

11. HESA student record fields identify students who are in receipt of fee waivers and their corresponding value. This information will be extracted through the IRIS system and signed off by HEPs.

12. These figures will be cross-checked against the criteria outlined in Allocations in paragraph 3 above and anything that does not fit the criteria will be questioned with the HEP.

Students identified as in receipt of a fee waiver	StudentFinancialSupport.FINSUPTYPE = 200
Amount of fee waiver	Value returned in StudentFinancialSupport.FINSUPAMOUNT

Data used in income analysis

1. As part of the work carried out to monitor income at Welsh HEPs, student number and FTE data are taken from the HESA student record. A summary of these data is included in the IRIS output. The criteria used for extraction are below, with data reduced to an engagement level prior to summarising and student course session level variables taken from the latest SCS (Engagement.Z_LATESTSCSMRK = 1):

Table A - FT UG home fundable new entrant enrolments by domicile

HESA standard registration population	Engagement.Z_POPSR_CYC= 1
Welsh domiciles (including EU and Island counted as home fundable)	Engagement.Z_PERMADDPROVGRP4 = 04, 05, 06
Other home domiciles	Medr-fundable students not coded with Engagement.Z_PERMADDPROVGRP4 = 04, 05, 06
Medr fundable	FundingBody.FUNDINGBODY = 5017
New entrants	Engagement.ENGSTARTDATE ≥ 2024-08-01
Full-time	Engagement.Z_MODEGRP1 = 01
Undergraduate	Qualification.QUALCAT = M0002, M0016 **and** Course.TTCID ≠ 01 all H, I, J, C codes except Qualification.QUALCAT = H0013 **and** Course.TTCID = 01

Table B - FT UG home HEFCW-fundable enrolments by domicile

2. Coding is as above except all enrolments are summarised and not just new entrants. This table does not show a breakdown by assumed fee regime as in past years as all FT UG students are now assumed to be in the same fee regime.

Table C - Total FTE broken down by domicile and fundability status

HESA session population	Engagement.Z_POPSES_CYC = 1

Plus the following criteria:

Full-time equivalent	FTE = Engagement.Z_STULOAD_CYC/100
Domicile	**Home:** FundingBody.FUNDINGBODY = 5017 **or** Engagement.FEEELIG = 01, 03 and FundingBody.FUNDINGBODY ≠ 5017
Fundability status	Medr fundable: FundingBody.FUNDINGBODY = 5017 Non-fundable: Otherwise

Data used for monitoring national measures

1.   The HESA data used in monitoring these measures and the criteria used to extract the data are detailed below. Unless otherwise noted the details of the extractions below are as applied to 2024/25 data.

2.   Wherever possible data are based on HESA standard populations, and student figures relate to enrolments unless otherwise stated. Data disclosure controls will be applied to all data that relate to individuals.

3.   The following coding is applied to the HESA student record to extract the data for Welsh HEIs (and for UK totals where relevant) for the following measures: Widening Access, Part-time, Welsh medium, Student mobility, EU/Overseas students, Transnational education and for FEIs funded by Medr for HE provision: Widening Access, Part-time and Welsh medium. It should be noted that providers that return the HESA student record that are not funded by Medr for their HE provision are included in the IRIS outputs for the student data based measures for information, but are not included in the monitoring and publication of the measures. In the descriptions of the measures below, FEIs refers to the FEIs funded by Medr for HE provision.

Standard HESA registration population	Engagement.Z_POPSR_CYC = 1

A: Increasing widening access and inclusion

Widening Access

4.   The Widening Access measure is defined as follows:

   The number and proportion of undergraduate Welsh domiciled students of all ages studying higher education courses at HEIs and FEIs in Wales who are domiciled in
   a) the bottom two quintiles
   b) the bottom quintile
of Lower Super Output Areas in the Welsh Index of Multiple Deprivation 2014 (WIMD).

5.   Information relating to the WIMD 2014 can be found on the 'Community safety and social inclusion', 'Welsh Index of Multiple Deprivation' area of the StatsWales website. Postcodes have been mapped to these geographic areas using Medr's postcode database and are available to download from the Medr website.

6.   In addition to the coding presented in paragraph 3, the following coding is applied to the HESA student record to extract the data for undergraduate Welsh domiciled enrolments:

Undergraduate	Engagement.Z_LEVELGRP1 = 02
Welsh domiciled	Engagement.Z_PERMADDPROVGRP4 = 04
Latest student course session	Engagement.Z_LATESTSCSMRK = 1

7.   Of the students extracted using these criteria, those in the 20% of areas and also those in the 40% of areas that are the most deprived according to the WIMD 2014 areas are then identified using the EntryProfile.PERMADDPOSTCODE field on the HESA student record.

Participation

8.   The participation measure is defined as follows:

The number and proportion of all UK domiciled students of all ages studying higher education courses at HEIs and FEIs in Wales who are from UK low participation areas.

This is calculated separately for
   a) UK domiciled young full-time undergraduate entrants
   b) UK domiciled mature full-time undergraduate entrants
   c) UK domiciled part-time undergraduate entrants

9.   Both the participation and retention measures were monitored using data collected on the HESA student record, calculated and published by HESA as UK performance indicators. As the UK PIs are no longer being updated we have developed our own methodology for the participation measure, and work continues on calculating the retention measure.

10.   For young full-time undergraduate entrants, UK low participation areas are defined as those areas in the bottom 20% of areas as determined by POLAR4. For mature full-time and all part-time undergraduate entrants, in addition to being from the bottom 20% of areas as determined by POLAR4, there is a requirement of no previous HE to be considered from a UK low participation area.

11.   POLAR4 is no longer being updated by OfS and we will be reviewing alternative methods for calculating UK low participation areas, such as those areas in the bottom 20% of areas measured using the proportion of the population within an area with higher education level qualifications. This can be obtained from Census data, and is available at UK level.

12.   The following coding is applied to the HESA student record to extract the data for UK domiciled undergraduate entrants:

HESA session population	Engagement.Z_POPSES_CYC = 1
Undergraduate	Engagement.Z_LEVELGRP1 = 02

UK domiciled	Engagement.Z_PERMADDGRP2 = 01
Latest student course session	Engagement.Z_LATESTSCSMRK = 1
Engagement is not part of a collaborative programme between the reporting provider and an overseas partner where the student studies mainly overseas	CollaborativeProvision.COLPROVTYPEID ≠ 02
Entrants starting between 12/06/2024 and 11/06/2025 not leaving within 50 days of commencing	Engagement.ENGSTARTDATE ≥ 2024_06_12 and Engagement.ENGSTARTDATE < 2025_06_12 and Leaver.ENGENDDATE = blank or Leaver.ENGENDDATE - Engagement.ENGSTARTDATE > 49
Young or mature determined by age on 30 Sep in the AY student started	Age = Round down to a whole number $(20Y1*\_09\_30 – Student.BIRTHDTE) / 365.25$ Young: Age > 10 and Age < 21 Mature: Age ≥ 21 For students starting between 12/06/24 and 31/07/24, Y1 = 23 01/08/24 and 11/06/25, Y1 = 24
Previous HE known	EntryProfile.Z_HQUALENTGRP1 ≠ Z9, blank
Previous HE	EntryProfile.Z_HQUALENTGRP1 = 01, 02, 03, 04
No previous HE	EntryProfile.Z_HQUALENTGRP1 ≠ 01, 02, 03, 04, Z9, blank
Full-time	Engagement.Z_MODEGRP1 = 01
Part-time	Engagement.Z_MODEGRP1 = 02

13. Of the entrants extracted using these criteria, those in the 20% of areas that have the lowest young participation in HE according to POLAR4 are identified using the EntryProfile.PERMADDPOSTCODE field on the HESA student record. Postcodes in the bottom 20% of POLAR4 can be downloaded from the Medr website.

Retention

14. The retention measure is defined as:

    The proportion of full-time undergraduate students in HEIs and FEIs in Wales present in higher education one year following year of entry for
    a) UK domiciled students;
    b) students domiciled in the bottom two quintiles of WIMD

    plus, the proportion of part-time first degree students in HEIs and FEIs in Wales present in higher education two years following year of entry, for
    c) UK domiciled students;
    d) students domiciled in the bottom two quintiles of WIMD.

    Please refer to paragraph 9 above, which explains about plans to update the methodology for calculating the retention measure.

Part-time

15. The part-time student measure is defined as:

    a) The number and proportion of students attending higher education courses in Welsh HEIs and FEIs that are part-time,

    b) plus the percentage change year on year in the number of these part-time students compared to the equivalent figure for the UK (sector measure)

16. The following coding is applied to the HESA student record to extract the data for UK HEIs and Welsh FEIs:

Latest student course session	Engagement.Z_LATESTSCSMRK = 1
The student is part-time	Engagement.Z_MODEGRP1 = 02

17. Data for HE at FEIs in Scotland, Northern Ireland and England are taken from data collected in these countries equivalent to the Medr higher education students early statistics (HESES) survey.

18. For the first part of the measure, part-time enrolments as a percentage of all enrolments is calculated.

19. For the second part of the measure, the percentage change in the number of part-time enrolments since the previous year for HEPs in Wales is compared with the same figure for the whole of the UK.

Diversity of the student population

20. Equality and diversity monitoring of staff and students at Welsh HEPs is currently calculated at sector level and will be published on the Medr website. Details of how the data are calculated are provided in Annex E.

21. Specific equality and diversity national measures are yet to be determined.

B: Improving student experience

National Student Survey

22. The student satisfaction measure is defined as follows:

The three year rolling average score for Wales in the National Student Survey 'overall satisfaction' question compared with the equivalent figure for the UK. [sector measure, and three year rolling average by institution]

23. This measure is monitored using data taken from the NSS.

Welsh Medium

24. The Welsh medium measure is defined as follows:

The number of students studying higher education courses at HEIs and FEIs in Wales undertaking
   a) at least 5 credits
   b) at least 40 credits
of their course through the medium of Welsh, per annum.

25. Where PGR delivery through the medium of Welsh is recorded on the student course session and not on modules, in addition to the coding at paragraph 3, the following coding is applied to the HESA student record to extract the data:

PGR delivery through the medium of Welsh	StudentCourseSession.PGRLANGID = 01 And Engagement.Z_LEVELGRP2 = 01 and StudentCourseSession.PGRLANGPCNT > 0
Welsh medium credits	Estimate credits Credits = StudentCourseSession.Z_STULOADSCS x 180 / 100 Estimate Welsh medium credits

	Wm_credits = StudentCourseSession.PGRLANGPCNT x 100 x credits

26. All other delivery through the medium of Welsh is recorded on modules. The following coding (in addition to that at paragraph 3) is applied to the HESA student record to extract the data:

To ensure module not continuing from previous student course session	For any multiple occurrences of MODID, the occurrence with the earliest MODINSTSTARTDATE is selected
Include only modules started in the 2024/25 academic year	ModuleInstance.MODINSTSTARTDATE ≥ 2024-08-01 and ModuleInstance.MODINSTSTARTDATE ≤ 2024-07-31

27. Of the students extracted using these criteria, those taking modules through the medium of Welsh are identified using:

Taking a module through Welsh	Module.MODLANGID = 01 and ModuleInstance.LANGPCNT > 0

28. Credits through the medium of Welsh are calculated:

Welsh medium credits	ModuleInstance.LANGPCNT / 100 x Module.CRDTPTS (where Module.CRDTPTS ≠ null)

29. The total number of Welsh medium credits being studied on each enrolment is summed. The number of enrolments with at least 5 credits and the number with at least 40 credits studied through the medium of Welsh is then calculated.

Student mobility

30. The student mobility measure is defined as:

   The number and percentage of undergraduate students at Welsh HEIs taking up study, work and volunteering experiences abroad, for
   a) undergraduate students
   b) undergraduate students domiciled in the bottom two quintiles of WIMD

31. In addition to the methodology described in paragraph 3, students are identified as being in the bottom two quintiles of WIMD2014 using the Student.Entry profile.PERMADDPOSTCODE field on the HESA student record and undergraduate enrolments with mobility experiences are selected as follows:

Latest student course session	Engagement.Z_LATESTSCSMRK = 1
Undergraduate	Engagement.Z_LEVELGRP1 = 02
Mobility experience	<u>OffVenueActivity.</u>ACTTYPEID <u>= 02, 03, 04</u> **and** <u>OffVenueActivity.</u>COUNTRY <u>≠ GB, XF, XG, XH, XI, XJ,</u> <u>XK, GG, JE, XL, IM</u>

32. As outlined in paragraph 5 above, postcodes have been mapped to WIMD 2014 areas using Medr's postcode database and are available to download from the Medr website.

Quality

33. The quality measure is defined as:
Outcomes of the QAA Quality Enhancement Review (QER) for each Welsh HEI and FEI being reviewed.

34. Information on the QER for each institution is published on the QAA website.

OIA complaints

35. The Office of the Independent Adjudicator (OIA) complaints measure is defined as follows:

    Total complaints (justified, partly-justified and settled) made against Welsh institutions to the Office of the Independent Adjudicator as reported in the OIA's annual report and annual statements.

36. Data are taken directly from the 'Complaints closed by Outcome' section of the OIA annual statements. Data are complaints closed in the given year, with an outcome of justified, partly-justified or settled. Complaints which are not eligible, not justified or withdrawn are not included.

C: Strengthening skills, employability and entrepreneurship

Employment

37. The employment measure is defined as:

    The proportion of leavers from Welsh HEIs and FEIs obtaining undergraduate qualifications who were employed, studying or both 15 months after leaving compared with the equivalent figure for the UK.
    (For 2016/17, this was 6 months after leaving.)

38. The Destination of Leavers from Higher Education (DLHE) survey was replaced by the Graduate Outcomes (GO) survey, which surveys students 15 months after graduating unlike DLHE, which surveyed students 6 months after graduating.

39. Although there is a break in continuity of the data between 2016/17 and 2017/18 due to changes to survey methodology and length of time leavers are surveyed following graduation, the employment measure based on GO data was developed to be as similar as possible to the original DLHE PI which was used for this measure.

40. The following description of the methodology has been written as applied to the 2023/24 Graduate Outcomes survey. Leavers fitting the following criteria who respond to the Graduate Outcomes survey are included, using the 2023/24 Student Record:

GO target population	Engagement.Z_POPGO_CYC = 1 (2023/24 Student record)

41. In addition to the target population, the following criteria are applied:

UK domiciled	Engagement.Z_PERMADDGRP2 = 01
Undergraduate qualification obtained	Engagement.Z_GLEVELGRP1_CYC = 02
Students who were working and/or studying or who were unemployed and seeking work (or alternatively all respondents except those who reported they were taking time out to travel, caring for someone, retired or doing something else)	XACTIVITY = 01, 02, 03, 04, 05, 06, 07, 08, 12
Students who are working and/or studying	XACTIVITY = 01, 02, 03, 04, 05, 06, 07, 08

Graduate employment

42. The graduate employment measure is defined as:

The proportion of leavers from Welsh HEIs and FEIs who were working or working and studying who were working in a managerial/professional job 15 months after leaving.
(For 2016/17, this was 6 months after leaving.)

43. Although there is a break in continuity of the data between 2016/17 and 2017/18 due to changes to survey methodology and length of time leavers are surveyed

following graduation, the graduate employment measure based on GO data was developed to be as similar as possible to the original DLHE measure.

44. The following description of the methodology has been written as applied to the 2023/24 Graduate Outcomes survey. Leavers fitting the following criteria who respond to the Graduate Outcomes survey are included:

GO target population	Engagement.Z_POPGO_CYC = 1 (2023/24 Student record)

45. In addition to the target population, the following criteria are applied:

Home or EU domiciled	Engagement.Z_PERMADDGRP3 = 01, 02
Students working or working and studying	Graduate.MIMPACT = 01, 05 and employment maps to a valid SOC2020 code or Graduate.MIMPACT = 02, 03, 04 and self-employment maps to a valid SOC2020 code and (Graduate.ALLACT01 = 1 or Graduate.ALLACT05 = 1) and employment maps to a valid SOC2020 code or (Graduate.ALLACT02 = 1 or Graduate.ALLACT03 = 1 or Graduate.ALLACT04 = 1) and self-employment maps to a valid SOC2020 code Derived fields XEMP2020SOC (employment) and XBUS2020SOC (self employment) are used to determine valid SOC codes.
Students in managerial/professional jobs	Graduate. MIMPACT = 01, 05 and XEMP2020SOC1 = 1, 2, 3 or Graduate. MIMPACT = 02, 03, 04 and XBUS2020SOC1 = 1, 2, 3 and (Graduate.ALLACT01 = 1 or Graduate.ALLACT05 = 1) and XEMP2020SOC1 = 1, 2, 3 or (Graduate.ALLACT02 = 1 or Graduate.ALLACT03 = 1 or Graduate.ALLACT04 = 1) and XBUS2020SOC1 = 1, 2, 3

	Derived fields XEMP2020SOC1 and XBUS2020SOC1 contain the first digit of the SOC codes in XEMP2020SOC and XBUS2020SOC, which are used to identify SOC major groupings.

C: Strengthening skills, employability and entrepreneurship

Continuing Professional Development

46.   The continuing professional development measure is defined as:

The total number of learner days delivered by Welsh HEIs for continuing professional development and continuing education, recorded on the HE-BCI survey.

47.   Data for the total number of learner days of Continuing Professional Development (CPD)/Continuing Education (CE) courses being delivered are taken from part B, Table 2, item 3f of the HE-BCI survey.

D: Broadening innovation and engagement

Total HE-BCI income per FTE of Academic Staff

48.   The total HEBCI income per FTE of academic staff measure is defined as:

The total amount of income recorded on the HE-BCI survey from collaborative research, consultancy, contract research, continuing professional development, facilities and equipment related services, intellectual property and regeneration and development, divided by full-time equivalent number (FTE) of academic staff.

49.   HE-BCI data for the total amount of income in relation to the following areas are taken from the tables indicated below in part B of the HE-BCI survey and added together:

	Table	Item
Collaborative research	1	1e
Contract research	1	2h
Consultancy	2	1h
Facilities and equipment related services	2	2h
Continuing professional development	2	3e
Regeneration and development	3	1f
Intellectual property	4	3f

50.   FTE of academic staff is the sum of Contract.CONFTE excluding atypical contracts taken from the HESA staff record and is extracted as follows:

HESA contract session population	XPSESC01 = 1
Excluding atypical contracts	Contract.TERMS ≠ 3
Academic	XACMRK01 = 1

51.   The total HE-BCI income is then divided by the total FTE of academic staff.

Spin off activity

52.   The Spin off activity measure is defined as:

New spin-offs and spin-offs still active which have survived at least three years.

53.   Data are taken from part B of the HE-BCI survey, Table 4, sub-heading 4a, items i and ii and added together.

Start-up activity (graduate)

54.   The Start-up activity (graduate) measure is defined as:

New start-ups and start-ups still active which have survived at least three years.

55.   Data are taken from part B of the HE-BCI survey, table 4, sub-heading 4a, item iv.

REF impact outcomes

56.   Information from the most recent research assessment exercise, REF 2021, about the impact of research undertaken by HEIs in Wales is available on the REF website.

57.   Further information is also available on the Medr website.

58.   Specific REF impact outcome national measures are yet to be determined.

E: Increasing internationally excellent research

Research Staff

59.   The Research Staff measure is defined as:

The number of
   a) all researchers
   b) STEMM researchers
   c) non-STEMM researchers

60.   For the purpose of this measure STEMM includes Science, technology, engineering, mathematics and medicine and dentistry.

61. The FTE is the sum of all Contract.CONFTE excluding atypical contracts for all research staff and is calculated for those staff on contracts with an academic employment function of research or research and teaching from the HESA staff record as follows:

HESA contract session population	XPSESC01 = 1
Excluding atypical contracts	Contract.TERMS ≠ 3
Research	Contract.ACEMPFUN = 2
Research and teaching	Contract.ACEMPFUN = 3

62. The FTE is further split into the FTE for STEMM and non-STEMM researchers:

STEMM FTE	The proportion of Contract.CONFTE attributable to activities in STEMM cost centres as indicated by Activity.CCPROP STEMM cost centres are 101 to 107 and 109 to 122
Non-STEMM FTE	The proportion of Contract.CONFTE attributable to activities in non-STEMM cost centres as indicated by Activity.CCPROP Non-STEMM cost centres are 108, 123 to 145

63. A list of cost centres is available on the HESA website.

PGR students

64. The PGR students measure is defined as:

    The total number of all PGR students (FTE).

65. FTE of PGR students is calculated from the HESA student record as follows:

HESA student session population	Engagement.Z_POPSES_CYC = 1
Latest student course session	Engagement.Z_LATESTSCSMRK = 1

Postgraduate research qualification aim	Engagement.Z_LEVELGRP2 = 01
FTE	Engagement.Z_STULOAD_CYC/100

PhDs awarded

66. The PhDs awarded measure is defined as:

The total number of PhDs awarded.

67. The total number of PhDs awarded is calculated from the HESA student record as follows:

Qualifications obtained population	Engagement.Z_POPQUAL_CYC = 1
PhD awarded	Engagement.Z_QLEVEL_CYC = D0003

Research income

68. The Research Income measure is defined as:

The annual percentage change in income from
 a) Research in total; and
 b) Research Councils
compared to the comparable figure for the UK excluding the 'golden triangle' of Oxford, Cambridge and certain London institutions)

69. The data are taken from column 1j) Total Research Council income and column 15) Total Research income, of Table 4 of the HESA Finance Record. The data are compared to the UK figure excluding data for the 'golden triangle' of HEPs; these are Oxford, Cambridge, Imperial, University College London, King's College London and London School of Economics. Data for the Open University are available at UK level only for this measure and therefore Wales-based activity cannot be reported.

REF outcomes

70. Information from the most recent research assessment exercise, REF 2021, about the outcomes of research undertaken by HEIs in Wales is available on the REF website.

71. Further information is also available on the Medr website.

72. Specific REF outcome national measures are yet to be determined.

F: Other measures to be monitored

Financial health

73. Information about the financial health of HEPs in Wales is published on the Medr website.

74. Specific financial health national measures are yet to be determined.

Estates

75. Information about the Estates of HEPs in Wales, collected in the estates management record is available as HESA Open data.

76. Specific estates national measures are yet to be determined.

Senior staff pay and gender pay gap

77. Information about senior staff pay and gender pay gap of HEPs in Wales is due to be reviewed in Medr.

78. Specific national measures in this area are yet to be determined.

Equality and diversity staff data

79. Equality and diversity monitoring of staff and students at Welsh HEPs is currently calculated at sector level and published on the Medr website. Details of how the data are calculated are provided in Annex E.

80. Equality and diversity staff data at institutional level are published on the HESA website.

81. Specific equality and diversity national measures are yet to be determined.

G: EU/International monitoring

EU/Overseas students

82. The overseas measure is defined as follows:

The percentage annual change in the number of
    a) EU domiciled students (excluding UK)
    b) overseas students (excluding EU)
attending higher education courses in Welsh higher education institutions, plus the percentage annual change in the number of these students compared to the equivalent figure for UK higher education institutions (excluding London and the South East).

83. For the purposes of this target, in addition to those students included in the standard HESA registration population as identified in paragraph 3 above and where Engagement.Z_LATESTSCSMRK = 1, incoming exchange students as coded below are also included.

Include incoming visiting or exchange	Engagement.INCOMINGEXCHANGE = 01, 02, 03, 04
Studying at HE level	Engagement.Z_LEVELGRP1 = 01, 02
Active 01/08/24 to 31/07/25 student was active (excluding writing-up) after anniversary of the engagement start date + 14 days	Leaver.ENGENDDATE ≥ 2024_08_01 or blank **and** Engagement.ENGSTARTDATE ≤ 2025_07_31 **and** Engagement.Z_ACTANN_CYC = 1
Not students primarily studying abroad	Engagement.Z_PRINONUK = 0
Latest student course session	Most recent StudentCourseSession.SCSSTARTDATE

84. The following criteria are applied to the HESA student record to extract the data for UK HEIs:

Exclude HEIs in London and the South East of England	Engagement.Z_PROVIDERGRP3 ≠ 07, 08

85. Of the students extracted using these criteria, EU domiciled (excluding UK) students are identified using:

EU domiciled (excluding UK)	Engagement.Z_PERMADDPROVGRP4 = 06

86. Of the students extracted using these criteria, those from overseas domiciled (excluding EU) are identified using:

Overseas domiciled (excluding EU)	Engagement.Z_PERMADDPROVGRP4 = 07

87. For the purposes of this target the Channel Islands and the Isle of Man are considered to be part of the UK.

88. The percentage change in the number of EU students (excluding UK) and the percentage change in the number of overseas students (excluding EU) since the previous year for HEIs in Wales is calculated and also compared with the same figure for the whole of the UK, excluding HEIs in London and the South East of England.

EU/overseas staff

89. The EU/overseas staff measure is defined as:

    The number and percentage of academic staff at Welsh higher education institutions that are
    a) EU nationals
    b) Overseas nationals (excluding EU)
    plus, the percentage annual change, and the percentage annual change compared to the equivalent figure for the UK.

90. The full person equivalent (FPE) of academic staff is calculated from the HESA staff record as follows:

HESA staff person population at 1 December	XPOPP01 = 1
Academic	XACMRK01 = 1

91. FPE is apportioned according to the contracts a staff member has which are active on 1 December. Therefore if a member of staff has two contracts, one academic and one non-academic the portion of their time spent on the academic contract is counted in this measure, and the portion of their time spent on the non-academic contract is excluded. The portion of their time spent on a contract is derived from Contract.CONFTE divided by the total of Contract.CONFTE for all their contracts active on 1 December.

92. FPE is further split into that attributable to EU and overseas staff as follows:

EU	XSNAT01 = 2
Overseas (excludes EU nationals)	XSNAT01 = 4, 5

93. When calculating the percentage of academic staff those with unknown nationality are excluded from the denominator.

Transnational education

94. The transnational education measure is defined as follows:

    The number and percentage of students that are transnational education students at Welsh higher education institutions.

95. The number of transnational education (TNE) students is taken from the aggregate offshore record (AOR). Students with more than one enrolment are counted only once in this dataset.

TNE students active in AY	Sum of XHEADCOUNTEXDS
HE level provision	XLEVAG01 = 1, 2, 3

96. All other students are extracted from the HESA student record and are those included in the HESA standard registration population as outlined in paragraph 3 above.

97. The percentage of students that are TNE students is calculated by dividing the number of TNE students by the sum of TNE students taken from the AOR and all other students taken from the HESA student record.

Data used for monitoring and adjustment of degree apprenticeship funding

1. The data described below are those which will be used in monitoring the number of degree apprenticeships and to determine if any adjustment to funding will be required. Funding is initially paid on the basis of degree apprenticeship data returned as part of the 2024/25 HESES survey, but amounts are validated and adjusted as necessary once HESA data are available (refer to paragraph 45 to 47 of the introduction).

2. The HESA data are extracted through the IRIS system and signed off by HEPs. The criteria below are used to extract the data from the student record. Not all the required data are collected in the HESA student record currently. Therefore it is also necessary to directly collect some data items about apprenticeships during the IRIS sign-off process.

3. The criteria applied is that a student is on a Medr fundable degree apprenticeship at level 6, is included in the HESES/EYM population, and only modules that started within the academic year are counted. Additionally APEL modules are excluded from the population:

Medr-funded degree apprenticeship scheme	StudentInitiative.STUINITID = 020 or CourseInitiative.COURSEINITID = 020
HESES/EYM population	<u>Students studying towards a recognised level 6 UG qualification aim (excluding credits only)</u> Qualification.QUALCAT = H codes and <u>not writing up or dormant</u> Exclude if: All student course sessions for the academic year have been classified as dormant/writing-up (as per the EYM guidance for dormant/writing-up students) and <u>not an incoming exchange student</u> Exclude if: Engagement.INCOMINGEXCHANGE = 01, 02, 03 or 04 and <u>students studying for ≥ 3% FTE</u> Z_STULOAD_CYC ≥ 3.0
Student Course Session started or ended in academic year	StudentCourseSession.SCSSTARTDATE ≤ 2025-07-31 **or** StudentCourseSession.SCSENDDATE ≥ 2024-08-01

Module not taken through Accreditation of Prior Experiential Learning (APEL)	ModuleInstance.APEL ≠ 01, 02
Modules started in 2024/25	Modules started in 2024/25 ModuleInstance.MODINSTSTARTDATE ≥ 2024-08-01 **and** countable modules ModuleInstance.MODCOUNT = 02 **and** modules not on a not-for-credit basis ModuleInstance.MODULEOUTCOME ≠ 04
Mode of study	Full-time (including sandwich year out) Engagement.Z_MODEGRP1 = 01 Part-time Engagement.Z_MODEGRP1 = 02
Age	Aged under 21 on 2024-08-31 Aged 21 and over on 2024-08-31 calculated using Student.BIRTHDTE
Disability	Impairment/s, health condition/s or learning difference/s : Engagement.Z_DISABILITYMRK = 1 No known impairment, health condition or learning difference (including not applicable and not known): Engagement.Z_DISABILITYMRK = 0
Sex of student	Male Student.SEXID = 11 Female Student.SEXID = 10 Other Student.SEXID = 12
Welsh speaker	Welsh speaker LanguageProficiency.LANGPROFICIENCYID=01 and LanguageProficiency.PROFICIENCYTYPE =02

	Not a Welsh speaker otherwise	
Ethnicity	Black and minority ethnic group Engagement. Z_ETHNICGRP1 = 01 White Engagement. Z_ETHNICGRP1 = 02 Not known or not applicable Engagement. Z_ETHNICGRP1 = Z9	
Student engagement started in cycle	Z_ENTRANT_CYC= 1	
Course engagement length	Calculated using HESA derived field: Z_EXPECTOLENGRP1	
Entry point	Calculated using Engagement.ENGSTARTDATE	

Data used in the calculation of Research Wales Innovation Fund

1. Full details of the RWIF model used from 2023/24 onwards can be found in Annex B of HEFCW circular [W22/41HE](#).

2. The data submitted by Welsh HEIs to the HESA Higher Education Business and Community Interaction ([HE-BCI](#)) survey, used in the calculation of this return consist of the following data:

Data	Source
Collaborative research: Total Income	HE-BCI Table 1 Item 1e
Contract research: Total Income	HE-BCI Table 1 Item 2h
Consultancy Contracts : Total Income	HE-BCI Table 2 Item 1h
CPD courses and CE : Total Revenue	HE-BCI Table 2 Item 3e
Facilities and Equipment Related Services : Total Income	HE-BCI Table 2 Item 2h
Regeneration and Development : Total Income (excl. Capital income)	HE-BCI Table 3 Item 1f
Intellectual Property : Total revenue	HE-BCI Table 4 Item 3f
CPD courses and CE : Total Learner Days	HE-BCI Table 2 Item 3f
Spin-offs (with some HEP ownership and those not HEP owned), number still active which have survived 3 years	HE-BCI Table 4 Item 4ai & ii
Student Start-ups : number still active which have survived at least 3 years	HE-BCI Table 4 - Item 4aiv
Academic Staff FTE (excluding atypical contracts)	[HESA staff data](#)
Student FTEs (for the Open University in Wales only – proportion of UK student FTE that is Wales used to estimate Wales academic staff FTE for this provider)	HESA student record
Standard HESA registration population	Engagement.Z_POPSES_CYC
Full-time Equivalent (FTE)	Engagement.Z_STULOAD_CYC

3. Details of the RWIF model used between 2020/21 and 2022/23 can be found in Annex B of HEFCW circular [W22/16HE](#).

Data used in the calculation of Race equality funding and Well-being and health funding

1. Medr circular Medr/2024/03 announced race equality funding allocations for 2024/25. Medr circular Medr/2024/07 announced well-being and health, including mental health, strategy implementation allocations and additional financial support for well-being and health in 2024/25. These allocations use the same data from the HESA student record.

2. The HESA data are extracted through the IRIS system in one table, and signed off by providers.

3. For 2026/27 funding, the following criteria are used to extract students from the 2024/25 HESA student record:

   Using HESA derived fields:

Standard HESA registration population	Engagement.Z_POPSR_CYC = 1

4. If a student is following more than one course and has two or more records the student is counted only once. On the HESA student record, this means that only one engagement of each student is kept, all other engagements for the student are excluded.

Data used in targeted employability support allocations

1. Data used to calculate targeted employability support allocations are extracted from the HESA student record. The descriptions below refer to 2025/26 funding methods, but as applied to 2024/25 data.

2. Students eligible to be included in the targeted employability support allocations are those who are:

   - counted within the HESA standard registration population;
   - Medr fundable;
   - not initial teacher education students;
   - studying at greater than 50% FTE.

3. The following criteria applied to the HESA student record are used to extract the data:

Standard HESA registration population	Engagement.Z_POPSR_CYC = 1
Medr fundable	FundingBody.FUNDINGBODY = 5017
Non-ITE (QTS)	Course.TTCID ≠ 01
Studying at greater than 50% FTE	Engagement.Z_STULOAD_CYC > 50

4. The targeted employability support funding allocation is based on each provider's proportion of fundable 'widening access' students, of all domiciles, modes, and levels (including franchised out students), who are studying in Wales.

5. 'Widening access' students are defined as students:

   - with a disability; or
   - from a Black, Asian or minority ethnic group (UK-domiciled only); or
   - who are a carer; or
   - who are a care leaver; or
   - who are from an area of deprivation (Welsh-domiciled undergraduates only); or
   - who are from an area of low HE participation (UK-domiciled undergraduates only); or
   - with parents with no HE qualifications (UK domiciled undergraduates only).

6. The [Welsh Index of Multiple Deprivation](#) 2019 (WIMD19) is used to identify deprived students. 2021 Census data or POLAR data are used to identify students from low participation areas, depending on the student's age and mode of study.

7. To identify students from an area of deprivation, eligible students are categorised, using the home postcode of the student (EntryProfile. PERMADDPOSTCODE), into those that come from areas that map to quintiles 1 or 2 of WIMD19 and those that are from other areas.

8. To identify students from an area of low HE participation:

    - eligible part-time undergraduate students and full-time undergraduate students aged 21 or older at the beginning of the academic year are categorised, using the home postcode of the student (EntryProfile.PERMADDPOSTCODE) into areas where there is a low proportion of working age adults with HE level qualifications as defined in the 2021 Census and those that are from other areas.
    - eligible full-time undergraduates aged 20 or younger at the beginning of the academic year are categorised, using the home postcode of the student (EntryProfile.PERMADDPOSTCODE) into areas where there is a low proportion of young people who participate in higher education as defined by POLAR4 methodology and those that are from other areas.

9. Lists of postcodes in WIMD19 quintiles 1 or 2 and low participation areas are available on the [Data and analysis page](#) of the Medr website.

10. The following coding applied to the HESA student record is used to determine whether a student is considered to be 'widening access':

From a 'deprived' home postcode	Engagement.Z_LEVELGRP1 = 02 AND EntryProfile.PERMADDPOSTCODE maps to WIMD19 quintile 1 or 2
From a 'low participation' home postcode	Engagement.Z_LEVELGRP1 = 02 **and** Engagement.Z_MODEGRP1 = 01 **and** (Engagement.ENGSTARTDATE – Student.BIRTHDTE) / 365.25 ≥ 21 **and** EntryProfile.PERMADDPOSTCODE maps to AdultHE2021 quintile 1 or 2 **or** Engagement.Z_LEVELGRP1 = 02 **and** Engagement.Z_MODEGRP1 = 02 **and** EntryProfile.PERMADDPOSTCODE maps to AdultHE2021 quintile 1 or 2 **or**

	Engagement.Z_LEVELGRP1 = 02 **and** Engagement.Z_MODEGRP1 = 01 **and** (Engagement.ENGSTARTDATE – Student.BIRTHDTE) / 365.25 < 21 **and** EntryProfile.PERMADDPOSTCODE maps to POLAR4 quintile 1 or 2
From a Black, Asian or minority ethnic group	Engagement.Z_PERMADDPROVGRP4 = 01, 02, 03, 04, 05 **and** Student.ETHNIC ≠ all codes beginning 16, 17 or 99 (apart from 163 and 168)
Self-declared disability	Engagement.Z_DISABILITYMRK = 1
Carer	Student.CARER = 02
Care leaver	EntryProfile.CARELEAVER = 06, 07, 08
Parents do not have an HE qualification	Engagement.Z_LEVELGRP1 = 02 **and** Engagement.Z_PERMADDPROVGRP4 = 01, 02, 03, 04, 05 **and** EntryProfile.PARED = 02

Data used in calculating Capital funding allocations

1. Data used to calculate student FTE for all modes, levels and domiciles is extracted from the HESA student record to use in calculating Capital funding allocations.

2. The descriptions below refer to 2025/26 funding methods, but as applied to 2024/25 data. The latest published information about capital funding can be found in the HEFCW circular W24/12HE Capital Funding 2024-25.

3. The following coding applied to the HESA student record is used to extract student FTE:

In the HESA session population during the cycle	Engagement.Z_POPSES_CYC = 1
Student course session was the last returned	StudentCourseSession.Z_LATESTSCSMRK = 1

4. Student FTE as recorded in Engagement.Z_STULOAD_CYC is summed after the data has been reduced to engagement level.

Data used in calculating Wales Research Environment and Culture funding

1. Medr publication Medr/2024/08 announced continued funding to support new and existing activities within eligible institutions that enhance positive research cultures and environments. It is proposed to continue to support this area of activity until 2027/28 subject to future budgets.

2. The data used to allocate this funding come from the HESA student and staff records. Only HE institutions, not including the Open University, are eligible for this funding.

3. For 2026/27 funding, the following criteria are used to extract students from the 2024/25 HESA student record:

HESA student session population	Engagement.Z_POPSES_CYC = 1
Latest student course session	Engagement.Z_LATESTSCSMRK = 1
Postgraduate research	Engagement.Z_LEVELGRP2 = 01
FTE in 2024/25	Engagement.Z_STULOAD_CYC/100

4. For 2026/27 funding, the following criteria are used to extract staff from the 2024/25 HESA staff record:

HESA contract session population	XPSESC01 = 1
Academic research or research and teaching contracts	Contract.ACEMPFUN = 2, 3
FTE in 2024/25	Contract.CONFTE /100

Summary of outputs and sign-offs required by type of provider - HESA IRIS 2024/25   **Annex P**

IRIS output	Higher Education Institutions		Further Education Institutions directly funded by Medr for HE provision		Further dducation institutions and alternative providers that return data to HESA about specifically designated course provision	
	Produced in IRIS	Sign off required	Produced in IRIS	Sign off required	Produced in IRIS	Sign off required
EYM credit values tables	Y	Y	Y	Y	Y	N
Per capita funding	Y	Y	Y	Y	N	N
Disability premium	Y	Y	Y	Y	N	N
Access and Retention premium	Y	Y	Y	Y	N	N
Welsh medium premium	Y	Y	Y	Y	N	N
Expensive subjects premium	Y	Y	Y	Y	N	N
PTFW allocations	Y	Y	Y	Y	N	N
PTFW monitoring	Y	Y	Y	Y	N	N
Targeted employability support	Y	Y	Y	Y	N	N
RAS and WBMH funding	Y	Y	Y	Y	N	N
PGR funding	Y (excl. OU)	Y (excl. OU)	N	N	N	N
Degree Apprenticeships monitoring	Y	Y	N	N	N	N
Capital funding FTE	Y	Y	N	N	N	N
WREC funding	Y (excl. OU)	Y (excl. OU)	N	N	N	N
National Measures	Y	Y	Y	Y	Y	N
Data quality analysis	Y	N	Y	N	Y	N
Income analysis	Y	N	Y	N	Y	N
Welsh medium modules	Y	N	Y	N	Y	N

If you have any issues with the outputs or in meeting the sign off deadline of 05 December 2025 please email: **hestats@medr.cymru**

	Summary of Changes to IRIS Data Quality Analysis Following 2025 Review		
Table number 2023/24	**Table description**	**Change since 2023/24**	**Table number 2024/25**
Table 1:	Postcodes	Same	1
Table 2:	Ethnicity	Same	2
Table 3:	Proportion of module taught through Welsh	Removed for 202425, review for 2025/26	-
Table 4:	Coding of non-standard academic years	As 4ii last year	16
Table 5:	Average FTE/credits per engagement	Same	17
Table 6:	Data linked to previous year	Removed for 2024/25, review in future years through Medr education matching work	-
Table 7:	Non-completion of latest student course session	Same	23
Table 8:	Enrolments where the student did not complete the current engagement and left the institution by reason for leaving	Same	24
Table 9:	Welsh fluency	New - amended structure split over two tables	- Changed to tables 14, 15 (see below)
Table 10:	Disabled Students' Allowance (DSA)	New – brings in disability status	3
Table 11:	Outcome of module	Same	25
Table 12:	Highest qualification on entry	Same	4
Table 13:	Gender identity	Same	5
Table 14:	Religion or belief	Same	6
Table 15:	Sexual orientation	Same	7
Table 16:	Student support number by major source of tuition fees	Removed	-
Table 17:	Student support number	Same	18
Table 18:	Student fees	Removed	-
Table 19:	Care leaver	Same	8
Table 20:	Mobility experiences	Removed for 202425, review for 2025/26	-
Table 21:	Parental education	Same	9
Table 22:	APEL	Removed for 202425, review for 2025/26	-

Summary of Changes to IRIS Data Quality Analysis Following 2025 Review			
Table number 2023/24	**Table description**	**Change since 2023/24**	**Table number 2024/25**
Table 23	Engagements where the body responsible for allocating funding is either Welsh Government, Health Education and Improvement Wales, or Departments of Health/NHS/Social care	Same Proposed to add in funding information for apprenticeships, however due to increased data capture requirements across whole tertiary sector will establish needs and build into 2025/26 outputs.	19
Table 30	Carer	New	10
Table 31	Sex	New	11
Table 32	Date of birth	New	12
Table 33	Estranged	New	13
Table 34	Funding body	New	20
Table 35	Off venue activity	New	21
Table 36	Off venue activity – mobility scheme	New	22
Table 37	Language proficiency	New	14
Table 38	Welsh language proficiency by proficiency type and level	new	15
Additional tables to be built into 2025/26 IRIS outputs			
Detailed analysis of off-venue activity, franchised out and distance learning.			
Analysis of Initiatives field.			
Data used in Medr Official Statistics			