

Higher Education Data Requirements 2026/27

Date: 16 July 2026

Reference: Medr/2026/35

To: Heads of higher education institutions
Principals of further education institutions that provide higher education provision
Heads of providers that return specifically designated course provision on the HESA student record

Respond by: 27 November 2026

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Summary:

The publication informs higher education providers of the higher education data used to calculate funding allocations; to monitor National Measures; to monitor equality and diversity; for publication; for provision to Coleg Cymraeg Cenedlaethol; for the HESA student record data quality analysis; to monitor part-time fee waivers and degree apprenticeships; and to inform policy.

Introduction

1. This publication informs higher education providers (HEPs) of the higher education (HE) data used for the following purposes:
 - the calculation of funding allocations;
 - monitoring National Measures;
 - monitoring equality and diversity;
 - providing data to Coleg Cymraeg Cenedlaethol about Welsh medium provision;
 - publications;
 - analysing HESA student record data quality;
 - monitoring part-time fee waivers;
 - monitoring degree apprenticeships;
 - publishing Official Statistics;
 - monitoring Postgraduate Certificate in Education (PGCE) in Further Education (FE) provision;
 - informing policy.
2. In this publication HEPs include further education institutions (FEIs) providing higher education and higher education institutions (HEIs), that are funded by Medr. Also included are providers that subscribe to HESA to return their specifically designated course provision, but are not funded by Medr for their higher education provision. These providers are not included in the extractions and analysis relating to funding but are included in some of the other data extractions and analysis presented in this publication. Inclusion by provider type is signalled under the individual headings below and is further summarised in the table in Annex R.
3. The mappings in the annexes that relate to student data are based on Higher Education Statistics Agency (HESA) student record data being collected by Jisc for the 2025/26 data collection year. The mappings presented have been tested on data returned on the HESA student record for 2024/25 and early submissions for 2025/26. We welcome any feedback that providers have on the mappings in the annexes, either during the 202526 submission process so that we can make immediate changes to the Information Reporting Interface Service (IRIS) programs as necessary, or to feed into our review of these mappings ready for next year. Any comments that providers have should be sent to hestats@medr.cymru. Mappings for the end of year monitoring data extraction are contained in Annex K of the [End of Year Monitoring \(EYM\) publication](#). Comments on that mapping are also welcomed. Any significant changes to the mappings either in this document or in the EYM publication, made during the submission process, will be communicated to providers.
4. Should there be any major problems with the data extractions during the submission process, for example, issues with the mapping, the IRIS system or issues at individual providers, which mean that some or all of the IRIS outputs are not usable, then there is a possibility of re-extraction post-collection. If this is likely, we will inform providers.
5. Funding methods for 2027/28 are not final at the time of publication of this circular and some allocation methods may change. The funding methods included in this

circular are those for 2026/27. It is assumed for the sake of extraction of data that the funding methods will remain the same for 2027/28.

Main changes for 2026/27 compared to 2025/26

6. The main changes included in this publication compared to Medr publication [Medr/2025/14: Higher Education Data Requirements 2025/26](#), comprise:
- Annex E has been updated to outline the data extraction methods associated with Medr's Official Statistics publications.
 - Annex F has been updated to reflect changes made after taking into account the responses to the consultation on the review of the data quality analysis outputs. Details of the updated outputs for 2025/26 that were not implemented in 2024/25 IRIS, and any changes that will require further work are included in Annex S. We have also included additional sheets in the data quality analysis outputs that show the student data used in the tables.
 - A new Annex P has been introduced to outline the data extraction method associated with data used in calculating Initial Teacher Education (Qualified Teacher Status) placement funding.
 - A new Annex Q has been introduced to outline the data extraction method associated with data used for identifying Postgraduate Certificate in Education (PGCE) in Further Education (FE) students.

Contents

7. The contents of the annexes are as follows:

Annex A	Data used in teaching funding allocations
Annex B	Data used in research funding allocations
Annex C	Data used in the PGR training funding allocation
Annex D	Data provided to Coleg Cymraeg Cenedlaethol
Annex E	Data used in Medr's Official Statistics publications
Annex F	Data provided to higher education providers in the HESA student record data quality analysis
Annex G	Data used for allocating and monitoring the part-time undergraduate fee waiver scheme
Annex H	Data used in income analysis
Annex I	Data used for monitoring national measures
Annex J	Data used for monitoring and adjustment of degree apprenticeship funding
Annex K	Data used in the calculation of Research Wales Innovation Fund
Annex L	Data used in the calculation of anti-racism funding and Well-being and mental health funding
Annex M	Data used in targeted employability support allocations
Annex N	Data used in the calculation of capital funding
Annex O	Data used in calculating Wales Research Environment and Culture funding
Annex P	Data used in calculating Initial Teacher Education (Qualified Teacher Status) placement funding

Annex Q	Data used for identifying Postgraduate Certificate in Education in Further Education students
Annex R	Detail of outputs that each type of provider will receive through IRIS and associated sign-off requirements
Annex S	Summary of changes to IRIS Data Quality Analysis following 2025 review

Sources of Data

8. Medr uses data from its own surveys, data collected by HESA and data from the National Student Survey (NSS) in carrying out the purposes described in paragraph 1 above. Other data such as Universities and Colleges Admissions Service (UCAS) data are also used to inform policy and provide information about the HE sector in Wales.
9. Medr collects data from HEPs in Wales that are funded for their HE provision through:
 - the higher education students early statistics (HESES) survey; and
 - the student and finance forecasts requests (HEIs only).
10. Jisc collects data from all HEIs in the UK on the HESA records on:
 - student activity, including graduate outcomes;
 - information for students through the DiscoverUni return;
 - finance;
 - higher education business and community interaction (HE-BCI);
 - staff; and,
 - estates management.
11. Jisc collects the following data on the HESA records from Welsh FEIs providing HE directly funded by Medr and Welsh FEIs and alternative providers with specifically designated HE course provision:
 - student activity, including graduate outcomes;
 - information for students through the DiscoverUni return.
12. Readers of this publication are assumed to be familiar with the HESES and EYM surveys, the HESA records and surveys, the IRIS system and the 2021 Research Excellence Framework (REF) (HEIs only). The latest HESES, EYM and forecasts publications are available on the [data collection page of the Medr website](#); the latest HESA data manuals are available on the [HESA website](#) and REF circulars are available on the [REF 2021 website](#). Links or references to relevant publications or circulars can also be found throughout this publication.

Ensuring the accuracy of data

13. HESA data used in the allocation of funding are subject to confirmation by HEPs that Medr have correctly extracted the data from the HESA records. In general,

HEPs are not permitted to make amendments to data during the confirmation process if their HESA data are incorrect. The exception to this is when there are changes to the methods of extraction or the data used in funding, or where a different source of data is used. In these cases, we will allow amendments to the extracted data at the confirmation stage. As there are still some difficulties being encountered with return of data under the new HESA student record we are still allowing changes to be made to all IRIS outputs at the sign off stage. Providers should provide an explanation of any changes made. We will be gradually moving back to not permitting amendments to be made and will be consulting with providers on this. The providers that return data to HESA about their specifically designated course provision, that are not funded by Medr for their HE provision, do not need to sign off any of the IRIS outputs provided to them.

14. It is important that HEPs are confident that all their HESA data are correct before final returns are made to HESA and the data are signed off. HEPs should take note of any discrepancies in their HESA data that have been found in past years, including those flagged up as part of any data quality analyses carried out by Medr, issues found in HEPs' own scrutiny of the summaries output by IRIS, problems that HESA or Medr have brought to their attention, and issues and errors found through internal or external audits. In particular, HEPs should ensure that they study in detail the reports produced by HESA when they commit their data and make any necessary amendments as a result before signing off the data to ensure their data are credible. We recognise that there have been extensive changes to the data collection resulting from the implementation of the new student record under Data Futures in 2022/23, so we will continue to work with providers and Jisc to provide advice and guidance to ensure data quality is maintained. We may also use the historic amendments process if appropriate, for the 2025/26 HESA student record.
15. A number of confirmation reports are made available in the [IRIS](#) system and are required to be signed off by HEPs that are directly funded by Medr for their HE provision, and returned to Medr after the HESA student record submission for 2025/26 has been signed off by **29 October 2026**. To reduce the number of separate data verification exercises conducted during the year, most of the returns that require sign-off via a confirmation report are being processed through IRIS.
16. Details of the IRIS return process, components requiring sign-off and associated deadlines will be made available on the [IRIS web page](#) and through the [EYM 2025/26 publication](#). The full Medr data collection [schedule](#) is available via our [website](#).
17. The deadline for sign off of the IRIS outputs is outlined in the EYM publication and is **27 November 2026**. If providers think they will have any difficulty in meeting this deadline, they should contact us via hestats@medr.cymru.
18. For those data confirmations where amendments are not accepted, if there is an error in an HEP's HESA data, and this error would lead to the HEP being allocated funding greater than that to which it is entitled, the HEP is expected to notify Medr so that the funding can be adjusted accordingly.

Coding of subjects

19. The HESA student record uses the Higher Education Classification of Subjects (HECoS) coding system, and HECoS codes are grouped into a Common Aggregation Hierarchy (CAH) at three levels. Details of the codes and the CAH levels, along with a mapping from HECoS codes to the CAH groupings is available on the [HECoS webpage](#). Information relating to the [mapping of HECoS codes to Medr Academic Subject Categories \(ASCs\)](#) is available on the Medr website.

Data used in teaching funding allocations

20. The credit-based teaching funding allocations for part-time (PT) undergraduate (UG) provision for 2026/27 were based on 2024/25 credit value data taken from the EYM data extraction. Per capita funding for 2026/27 was allocated for all modes and taught levels of study and the disability premium was allocated for all modes and levels of study, including PGR. All other premium funding was allocated as follows:
 - Access and retention premium (PT UG only);
 - Welsh medium premium (all PT UG and specified FT UG only);
 - Expensive subjects premium (clinical medicine and dentistry and Conservatoire Performance Element, FT UG only);
 - Higher cost subjects premium (non-clinical medicine and dentistry, science & engineering and technology, and mathematical sciences, IT and computing, FT UG only).
21. This publication assumes:
 - that the credit-based teaching funding allocations for PT UG provision for 2027/28 will be based on 2025/26 EYM credit value data and
 - that per capita funding and the same premiums are being allocated with respect to the same groups of students for 2027/28 as in 2026/27, for the purposes of presenting information in this publication.
22. It should be noted that these assumptions may change.
23. The access and retention, disability, Welsh medium, expensive subjects and higher cost subjects premiums and the per capita allocation are based on retrospective data taken from the HESA student record.
24. End of year data extracted from the HESA student record are used to calculate any adjustment to teaching funding at the end of the academic year to which the funding relates. For example, EYM data relating to the 2025/26 academic year will be used to calculate any adjustment required to the 2025/26 part-time undergraduate credit based funding. Details of the end of year data extracted from the HESA record are contained within Annex K of the [EYM publication](#) (see paragraph 1) and are not reproduced here.
25. More information on data used in teaching funding, including the premium and per capita elements, is set out in Annex A.

26. The sign off procedure for data used in teaching funding for 2026/27 is built into the IRIS process. Any other data required to be used in the teaching or other funding allocations for 2026/27, not available in the IRIS outputs, will be verified and signed off separately. The IRIS outputs for teaching funding purposes are only produced for providers that are directly funded by Medr for their HE provision.

Data used in research funding allocations

27. Following REF 2021, a new [funding methodology](#) was used to calculate the QR funding allocation from 2022/23 onwards. Data used to calculate the 2022/23 QR funding were taken from REF 2021 and from the 2018/19, 2019/20 and 2020/21 HESA finance record. As all input data are frozen, this circular sets out the QR funding method as for 2022/23 in Annex B. Only HEIs, excluding the Open University (OU) in Wales, are included in QR funding allocations.
28. Following REF 2021, a new methodology was also used to calculate the PGR training allocation, which uses retrospective data taken from the HESA student record. The 2027/28 PGR training allocation will use data from the 2025/26 HESA student record. Further information on the HESA fields used is provided in Annex C. As outlined in paragraph 25, we intend to continue to obtain sign off of as much data as possible via the IRIS process, and there will be a sign off for PGR in the 2025/26 IRIS process. Only HEIs, excluding the OU in Wales, are included in PGR funding allocations, therefore, the PGR IRIS output is not produced for the OU in Wales, FEIs or alternative providers.

Data provided to Coleg Cymraeg Cenedlaethol

29. Medr provides data each year, under a data sharing agreement, to [Coleg Cymraeg Cenedlaethol](#). Additionally from 2020/21, in collaboration with the Coleg Cymraeg Cenedlaethol, monitoring has been carried out on the coding structure and return of Welsh medium provision on the HESA student record. This data is also summarised and included in IRIS for all providers, including those providers returning data about specifically designated courses. The fields and criteria used to extract both sets of data are detailed in Annex D.

Data used for Official Statistics and ad-hoc reports

30. Medr is a producer of official statistics. We align the figures in the official statistics publications with those produced by HESA where possible. Details of the data and methodology used in any official statistics publication will be included in the report and extraction criteria applied to data used in official statistics can also be found in Annex E.
31. All publications can be accessed via the Medr website

HESA student record data quality analysis

32. Medr provides a summary (referred to as the 'HESA data quality analysis') to each HEP of its data for a variety of fields which are used for funding, analysis and monitoring, which is designed to aid improvement of the quality of the student record and to be useful to both Medr and HEPs.
33. These summaries are intended to complement the reports which are provided by HESA when HEPs submit their student record. The data quality summaries are produced for all providers including those providers returning data about specifically designated courses.
34. The summaries produced by Medr, are included in the IRIS output so HEPs can see their own data for the current year and historic proportions data for their HEP and the sector.
35. The format of these outputs were reviewed in June 2025 and the outcome of the review and detail of updated outputs for 2024/25 and 2025/26 IRIS outputs are included in Annex S.
36. Further information on the fields and mappings used in the HESA data quality analysis can be found in Annex F.

Part-time fee waiver

37. From 2022/23 funding, data used in the allocation of the part-time fee waiver scheme have been extracted from the HESA student record. The extraction was added to the IRIS system for 2021/22 and data extracted via the IRIS system will be signed off by HEPs to confirm the data are correct. The process for 2025/26 allocations can be found in Medr publication [HE Part-Time Undergraduate Fee Waiver Scheme 2025/26](#). For the 2026/27 allocations, details will be published by Medr in summer 2026. Details of the data extracted for HEPs to sign off can be found in Annex G.
38. Data used to monitor the actual value of part-time fee waivers claimed by HEPs under the Medr scheme are extracted from the HESA student record via the IRIS system. Data extracted via the IRIS system will be signed off by HEPs to confirm the data are correct. The process for 2024/25 monitoring can be found in Medr publication [HE Part-Time Undergraduate Fee Waiver Scheme 2025/26](#). For monitoring of 2025/26 allocations, details will be published by Medr in summer 2026. Details of the data extracted for HEPs to sign off can be found in Annex G. The part-time fee waiver allocations and monitoring IRIS outputs are only produced for providers that are funded by Medr for their HE provision.

Income analysis

39. As part of the work carried out to monitor income at Welsh HEPs, data relating to student numbers and FTE at Welsh HEPs were used. A summary of the data is included in the IRIS output for information. Details of the criteria used to extract the

data can be found in Annex H. The income analysis outputs are produced for all providers.

National measures

40. Data used to monitor [national measures](#) are taken from the HESA student, staff, finance and aggregate offshore records; the HESA DLHE and graduate outcomes (GO) surveys; the published UK HE PIs; and the HESA HEBCI survey. Other sources, such as the National Student Survey (NSS), the Quality Assurance Agency (QAA) and the Office of the Independent Adjudicator (OIA) are also used. Data for FEIs that are funded for their HE provision by Medr are included in a subset of the measures and these data are taken from the HESA student record, the HESA DLHE and GO surveys; the published UK HE PIs, the NSS, the QAA and the OIA.

The measures monitored using these data are:

- Widening access;
 - Participation;
 - Retention;
 - Part-time;
 - National Student Survey;
 - Welsh medium;
 - Student mobility;
 - Quality;
 - Complaints
 - Employment;
 - Graduate employment;
 - Continuing Professional Development;
 - Total HE-BCI income per FTE of academic staff;
 - Spin off activity;
 - Start-up activity (graduate);
 - Research Staff;
 - PGR students;
 - PhDs awarded;
 - Research income;
 - EU/Overseas students;
 - EU/Overseas staff;
 - Transnational education.
41. A description of each of these measures and the data used to monitor them is included in Annex I.
42. Other areas which are monitored and included in the list of national measures include:
- Diversity of the student population;
 - REF impact outcomes;
 - REF outcomes;
 - Financial health;

- Estates;
- Senior staff pay and gender pay gap;
- Equality and diversity staff data

but individual measures are not specified, instead these are areas which are already analysed more widely and published by Medr. Information on where to find these analyses can also be found in Annex I.

43. The HESA student record based measures are extracted via the IRIS system and will be signed off by HEPs, other than those that didn't start submitting student data to HESA until 2023/24, to confirm the data are correct. Those providers that started submitting student data to HESA in 2023/24, are not included in the publication and monitoring of these measures, though the outputs are available to them through IRIS for information.
44. 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.

Data used for monitoring degree apprenticeships

45. Data used to monitor the end of year picture for the number of students enrolled on degree apprenticeships at HEPs are extracted from the HESA student record via the IRIS system and will be signed off by HEPs to confirm the data are correct. Details of the data extracted for HEPs to sign off can be found in Annex J. The IRIS degree apprenticeship outputs are not produced for FEIs or alternative providers.
46. The HESA data provided in the IRIS system will be used to verify the data that were collected as part of the [2025/26 HESES](#) return, and which were used to allocate funding. It is possible that adjustments to funding will be required. If this is the case, information on how adjustments to funding will be implemented will be communicated with HEPs separately.

Data used in the calculation of Research Wales Innovation Fund (RWIF)

47. HEFCW circular [W22/41HE](#) reports on the consultation outcomes for the 2022 review of the Research Wales Innovation Fund (RWIF) and confirms the allocation methodology and other updated RWIF requirements that were introduced in 2023/24. Data used in the allocation is described in Annex K. Only HEIs are included in RWIF funding allocations.

Data used in the calculation of Capital funding

48. Medr publication [Medr/2026/11](#) outlines the allocation methodology used for 2025/26 Capital funding. Student FTE data used in the higher education capital funding allocation is described in Annex N. Only HEIs are included in the Capital funding allocations.

Data used in the calculation of anti-racism funding and Well-being and mental health funding

49. Medr publication [Medr/2026/33](#) announced anti-racism funding allocations for 2026/27 and Medr publication [Medr/2025/30](#) announced Well-being and health, including mental health, strategy implementation allocations and an additional allocation for Well-being and health in 2025/26. Both the anti-racism and the well-being and health allocations use the same data from the HESA student record which is described in Annex L. The data will be available in the 2025/26 IRIS system and will be signed off by HEPs that are funded by Medr for their HE provision, to confirm the data are correct. The IRIS outputs to calculate this funding are only produced for HEPs that are funded by Medr for their HE provision.

Data used in the calculation of Targeted Employability Support (TES) funding

50. Medr publication [Medr/2026/19: Targeted Employability Support for HE Students: 2026/27 allocations](#) sets out institutional allocations for 2026/27. We will use the same funding methodology for calculating 2027/28 allocations using verified data included in the IRIS system for 2025/26. Data is to be signed off by HEPs that are funded by Medr for their HE provision, to confirm the data are correct. Details of the data extracted for HEPs to sign off can be found in Annex M. The IRIS outputs to calculate this funding are not produced for those providers who return data to HESA about their specifically designated course provision.

Data used to calculate the Wales Research Environment and Culture funding

51. Medr publication [Medr/2025/11](#) announced continued funding to support new and existing activities within eligible institutions that enhance positive research cultures and environments. The data used to calculate this funding is described in Annex O. Both HESA student and staff data are used. The student data will be signed off in the 2025/26 IRIS process. Only HEIs, excluding the OU in Wales, are included in the funding allocations and IRIS outputs are produced only for those that are funded.

Data used to analyse Welsh medium provision and language proficiency

52. Data relating to Welsh medium provision and Welsh language proficiency of students in Welsh HEPs are extracted from HESA student data by Medr for a variety of uses. Populations may vary depending on the primary use of data.
53. Welsh medium provision data is extracted for use in:
- Welsh medium premium funding (Annex A paragraph 37)
 - Data provided to Coleg Cymraeg Cenedlaethol (Annex D)
 - Monitoring National Measures, in particular the Welsh medium measure (Annex I paragraphs 24 to 29)
 - Medr's Official Statistics publications (Annex R)

54. Medr have been working with Coleg Cymraeg Cenedlaethol in their production of a guidance document to assist providers in coding and returning Welsh medium module data to the HESA student record. Further detail of this guidance can be found via the Coleg's publication: [Defining Welsh medium and bilingual provision in HE](#)
55. Welsh language proficiency data is extracted for use in:
- Medr's Official Statistics publications (Annex E)
 - Data quality analysis (Annex F, in particular tables 14 and 15)
 - Monitoring of degree apprenticeship recruitment (Annex J)

Other uses of data

56. Any of the data described may be used to inform policy. In particular, data on students taught in whole or in part through the medium of Welsh, and staff who teach or who are able to teach through the medium of Welsh will be used to inform policy on Welsh medium provision. Data relating to students at directly funded FEIs, franchised to FEIs from HEIs, or at FEIs with specifically designated course provision will be used to inform policy on HE in FEIs.
57. HESA operate a historic amendments facility for student data and a [fixed database facility for other data streams](#) which provides HEPs with the opportunity to make post-collection amendments to a dataset following closure of the live data collection. This facility is separate to the main data collection process, is subject to a charge and is only available at the express authorisation of Medr. The facility is open for some time after the corresponding live data collection has closed, therefore providers should be aware that data they submit via this facility may not be used immediately and may only appear in future analysis of time series.
58. The data described are also used by Welsh Government in their analysis of the higher education sector, including analysis published in their statistical bulletins and data presented on the [StatsWales](#) website.
59. Data relating to forecast student numbers at HEIs only are collected through the forecasts requests publication which is available on the Medr website: [Medr/2026/23: Request for forecasts 2026](#). These data are used for Medr's internal monitoring and planning processes and are not published at provider level.
60. It should be noted that although this publication details HESA fields used by Medr, any of the fields that HEPs return on the HESA records may be used in future for funding, for regulatory purposes, for monitoring purposes, to inform policy or for publication, and are also used by other organisations. Therefore, it is important that all HESA fields are completed fully and accurately to show a fair picture of the provision and activity at the HEP.

Audit

61. All data used for funding and monitoring are potentially subject to audit. Details of the most recent audit process for higher education data and further detail of the [internal](#) and external audit are included on the [Medr data and analysis webpage](#).
62. 2021/22 was the last year in the current cycle of external auditing of HE data. The external audit process is now the responsibility of Medr where the process will be reviewed.
63. As an interim measure, in place of the external audits, and until the process is reviewed by Medr, members of the Medr Higher Education Statistics team will meet with data contacts at each provider separately, where we will discuss items such as data quality and previous audit findings.

Use of HESA derived fields

64. Where HESA derived fields have been used they are shown in the coding details in each relevant section of the annexes that follow. All HESA derived fields for the student record are shown in the format **Entity.Z_FIELDNAME**, and for the staff record in the format Xfieldname. HESA derived fields specifications for the 2025/26 [student record](#) and [staff record](#) are published on the HESA website. Where a derived field has been used, the methodology used to derive the field from the original HESA record fields is available via the HESA website.

Further information

65. Providers are welcome to contact us if they need any further clarity or have comments on the mappings outlined in the annexes, any further updates required will be communicated to providers.
66. Any queries regarding this publication should be directed to Rachael Clifford (hestats@medr.cymru).

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