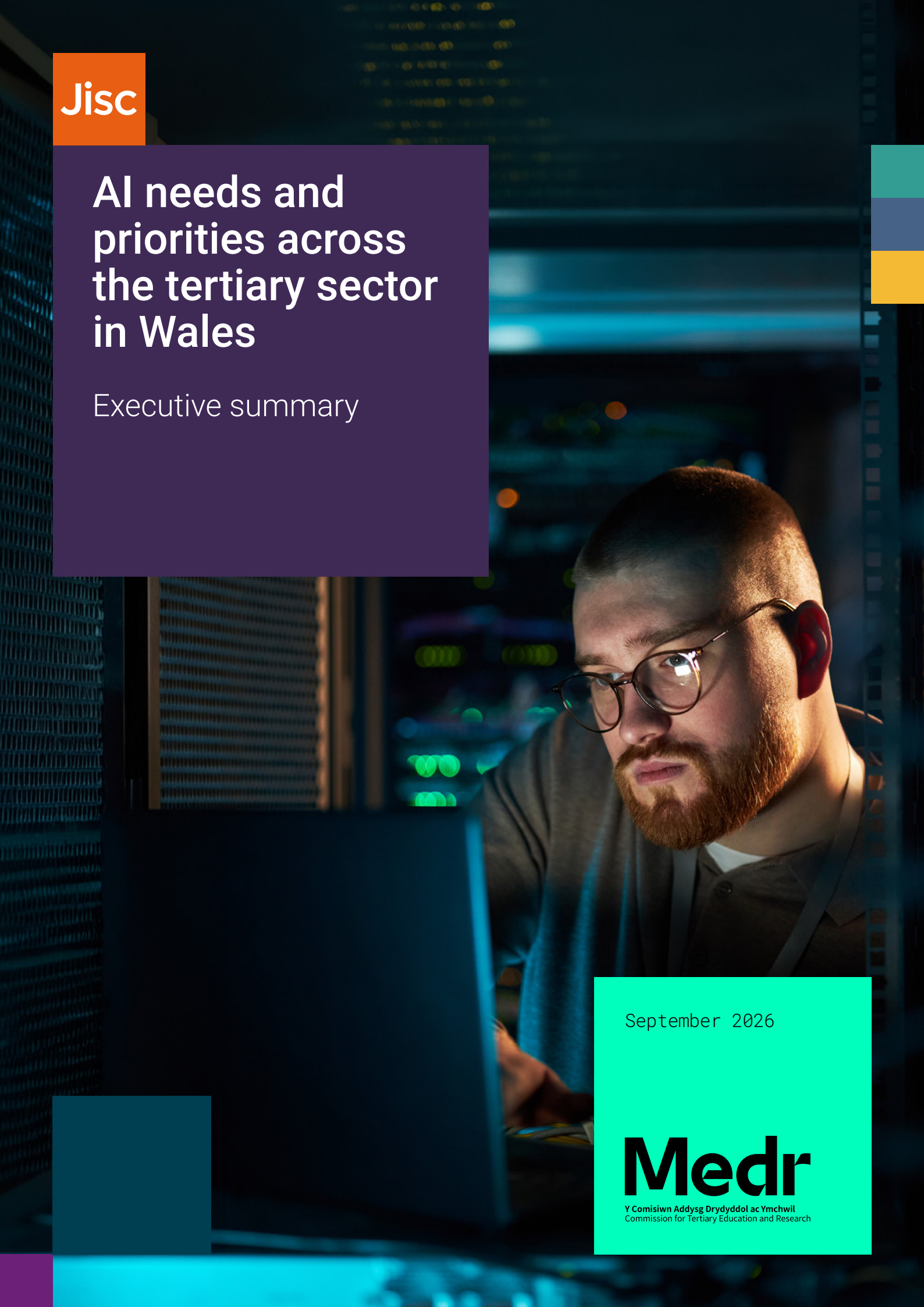
Jisc

AI needs and priorities across the tertiary sector in Wales

Executive summary



September 2026

Medr

Y Comisiwn Addysg Drydyddol ac Ymchwil
Commission for Tertiary Education and Research

Executive summary

The Welsh tertiary education sector is at a critical point in its digital transformation as artificial intelligence (AI) becomes increasingly embedded in teaching, learning, assessment and institutional operations.

Evidence gathered across HE, FE, apprenticeship providers and ACL show strong ambition and experimentation, with institutions recognising AI's potential to improve efficiency, enhance learner experience and support more personalised education. This report draws on workshops, interviews and analysis of Wales-specific responses to Jisc's 2025 Annual Leadership Survey across HE, FE, apprenticeships and ACL.

However, adoption remains fragmented and uneven. Institutions face structural challenges that cannot be solved independently, including inconsistent policies, duplicated work, significant procurement and compliance burdens, limited understanding across the sector of how Welsh language functionality operates within AI models, including uncertainty about the extent and quality of Welsh-language capability, and persistent digital inequities. Stakeholders across all sectors express a clear desire for a coordinated national approach that strengthens consistency, reduces duplication, and ensures equitable outcomes for learners across Wales.

Key cross sector challenges

- Policy inconsistency across institutions and awarding bodies, leading to unclear expectations for learners and staff
- Heavy administrative workload from tool evaluation, risk assessments, licensing and vendor negotiation
- Digital inequity, including varied access to devices, connectivity and Welsh language AI tools
- Legal, ethical and data privacy uncertainty, especially around secure vs training AI systems
- Misaligned assessment expectations and unclear guidance on acceptable AI use
- Uneven AI literacy among staff, learners, institutional leaders and workplace mentors supporting apprentices
- Variation in institutional risk appetite and organisational culture regarding AI adoption, leading to siloed innovation and duplicated effort across institutions

Key cross sector variance

- HE institutions have the greatest need for support in reviewing and approving AI tools and developing robust cases for resourcing
- FE colleges offer digital equity support for learners through on-site facilities, but some FE learners may still face challenges (including poor internet connectivity) 'out of hours', i.e. when studying at home
- Apprentices operate in a more complex scenario which can result in mixed messaging due to changes in availability of AI software and/or more limited exposure to AI in environments controlled by their employer
- ACL has the lowest perception of need for and investment of time into AI. Local authority-led programmes are particularly at risk of falling behind, as this provision is usually the most isolated

While the challenges identified are significant, they do not primarily require large-scale new capital investment. Rather, they require coordinated policy clarity, alignment of regulatory expectations, targeted investment in workforce capability and structured support for equitable AI adoption. Early coordination will reduce duplication across institutions, minimise regulatory confusion and help avoid escalating long-term licensing and compliance costs.

Fuller sector summaries are provided in the appendices.

Key recommendations

Medr recommendations

- Develop a principle-based national AI framework to guide policy and ensure consistent principles across the tertiary system. (MR1)
- Invest in digital equity and ring-fence funding for sustainable AI initiatives. (MR2)
- Work with Welsh Government to ensure that emerging national AI guidance is clearly interpreted and contextualised for the tertiary education and research sector in Wales, including clarification of legal requirements and good practice expectations. (MR3)
- Coordinate and align existing funded training into a consistent offer for the tertiary sector. (MR4)
- Encourage assessment practices relevant to an AI-enabled world, in collaboration with awarding bodies and other regulators. (MR5)

Jisc recommendations

- Develop shared procurement and licensing models for Wales. (JR1)
- Support vendor engagement to ensure equitable Welsh language functionality across key AI tools. (JR2)
- Work with and support Medr to develop a national AI framework to guide policy and ensure consistent principles across the tertiary system. (JR3)
- Provide frameworks for the sector to use in assessing new tools and offer sector guidance on Welsh language AI parity, led by Jisc in partnership with Coleg Cymraeg Cenedlaethol and sector bodies. (JR4)
- Convene national forums to align awarding bodies, Qualifications Wales, Estyn and Medr on assessment and guidance. (JR5)

Awarding body recommendations

- Align expectations and provide clear and consistent guidance (in English and in Welsh) on AI use in coursework, exams and marking; involve EQA staff in promoting and explaining awarding bodies' requirements. (AR1)
- Invest in secure digital assessment environments and support authentic, AI-relevant assessment models. (AR2)

Sector recommendations

- Collaborate on shared tool assessment, procurement and compliance processes. (SR1)
- Actively assess Welsh-language functionality and user experience when evaluating AI tools and take steps to mitigate any indirect inequity arising from stronger English-language model performance, particularly within Welsh-medium provision. (SR2)
- Provide blended AI literacy development for staff and learners. (SR3)
- Strengthen communities of practice and alongside coordinated pilots and collaborative evaluation exercises, enabling institutions to test tools collectively rather than duplicating parallel assessments. Develop case studies to demonstrate how these approaches work in practise across different roles. (SR4)

Conclusion

Wales has a strategic opportunity to take a coherent, national approach to AI adoption across tertiary education. By acting collectively with clear principles, aligned assessment expectations, shared procurement, strong Welsh language provision and a national AI literacy strategy the sector can move from fragmented experimentation to sustainable, equitable transformation.

Further information

For further information about this study, contact Jisc.
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