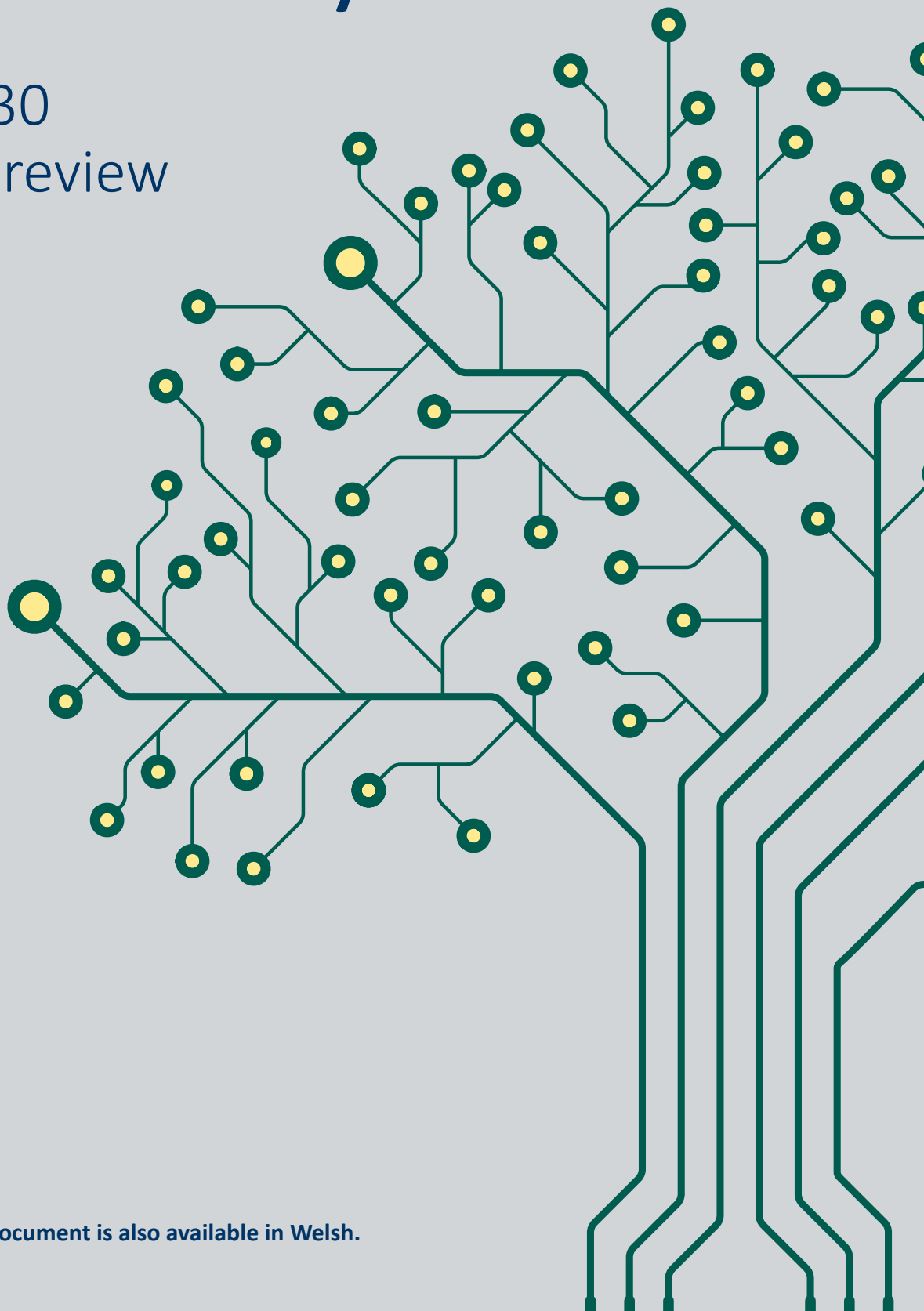
Digital 2030

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

Executive Summary

Digital 2030 mid-term review



August 2026

Jisc

This document is also available in Welsh.



Digital learning in Wales enters a new phase

Digital 2030 was published in 2019 with a clear purpose: to set a shared strategic direction for digital learning across post-16 education in Wales while allowing providers the flexibility to respond to their own contexts. The mid-term review considers how far that direction has been realised, what has changed in the years since, and recommends priorities for the framework's final phase.

The headline findings are broadly positive. The foundations which the Digital 2030 strategic framework set out to establish are now largely in place. Digital infrastructure, platforms and systems are embedded across further education, apprenticeships and adult community learning. Leadership commitment is visible. Collaboration across the sector has strengthened. Digital is no longer a discrete area of innovation, but is increasingly embedded within teaching, learning, organisational culture and the wider work of post-16 education.

The challenge has shifted. A system that spent much of the last decade building and adopting digital approaches now needs to ask whether those approaches are being experienced well and consistently by learners. That is the work of the next phase.

What has changed since 2019

The period since 2019 moved through three broad stages: an initial focus on raising awareness and improving infrastructure; rapid acceleration during the Covid-19 pandemic; and, since 2022, a shift towards consolidation, embedding and improving how digital learning is experienced in practice.

The wider context has also evolved. Medr was established in 2024, creating a more integrated tertiary structure across further education, higher education, apprenticeships and adult community learning. National digital policy and rapid developments in artificial intelligence have also reshaped the context in which Digital 2030 now operates.

The sector has become more mature and more complex since the Digital 2030 framework was first published.

What the review found

Strong foundations but practice is still uneven

Providers across Wales have made real and sustained progress. Investment in infrastructure and platforms has strengthened the foundations for digital learning. Leadership attention to digital learning is more consistent, and digital approaches are now more embedded in day-to-day teaching, learning and organisational practice across modules and courses.

What is less consistent is how evenly digital practice has been embedded across programmes and areas of provision. As a result, learners may encounter considerable variation in how digital learning is organised, communicated and supported across their learning experience.

This, in part, reflects the difficulty of moving from adoption to embedding in a sector that is so diverse, under pressure and operating within financial, capacity and organisational constraints.

The learner experience is broadly positive but not always joined up

Learners generally report positive experiences and make extensive use of digital tools. The challenge is less about whether digital is used, and more about how consistent and coherent the experience feels for learners.

What the review finds is that learners do not always experience digital learning coherently across programmes and contexts. Learners navigating different approaches across a single programme may have to repeatedly adjust. For many this is manageable. For those still developing digital confidence, or managing learning alongside other pressures, unnecessary variation can create avoidable friction.

Improving the coherence and predictability of the digital learner experience is one of the clearest priorities for the next phase. The aim is to reduce unnecessary variation while still allowing flexibility for different teaching approaches and contexts.

Workforce conditions shape what is possible

Digital capability matters, but so do the conditions in which staff are expected to develop and apply it. Workload pressures, limited time for professional learning and stretched middle-leader roles are real constraints on how far digital practice can be embedded and sustained over time. These conditions can also influence staff confidence and willingness to engage with new approaches.

Middle leaders play a critical role in translating ambition into consistent day-to-day practice. Supporting this group with the time, clarity and organisational backing needed to sustain effective digital practice is one of the practical priorities for the next phase.

Collaboration is a genuine strength

Practitioner networks, peer support and shared learning have supported confidence, experimentation and professional development in ways that formal strategy alone cannot replicate. These forms of collaboration remain an important part of how digital practice develops across the sector.

But collaboration has limits. Its benefits tend to remain local unless actively connected to strategy, leadership and sustained follow-through. Supporting more structured approaches to collaborative improvement and helping effective practice spread beyond individuals and teams remains an important priority.

Inclusion and bilingual experience need continued attention

Digital poverty continues to affect some learners. Accessibility practice has improved, but an equitable digital experience is not yet achieved consistently across the sector.

The review also identified a specific concern around bilingual digital experience. The findings suggest that learners and staff do not always feel equally supported to engage with digital learning in Welsh and English. Maintaining accessible and inclusive bilingual digital learning is an important priority for the next phase.



Artificial intelligence is reshaping the context

AI is already influencing assessment, learner support and professional judgement. The review identified genuine opportunities, including the use of tools to support accessibility, reduce aspects of administrative workload and improve feedback. It also identified real uncertainty.

Inconsistent guidance about acceptable AI use is creating anxiety for learners and staff, particularly where expectations vary between modules or organisations. In some cases, practice is developing faster than institutional strategy can keep pace with. These issues are already shaping learner and staff experience directly and are likely to require greater shared understanding across the sector over time.

The review concludes that AI should be understood as a cross-cutting issue shaping the broader digital learning environment, rather than as a separate workstream addressed in isolation.



What matters next

The review does not call for a structural redesign of Digital 2030. Its non-prescriptive approach remains appropriate, and the Vision and Aims remain relevant.

What it does point to is a need for sharper interpretation and stronger practical support. Providers want a clearer shared understanding of what effective digital practice looks like from the learner's point of view, refreshed supporting materials and practical guidance that reflect current pressures, and collaboration that is structured and purposeful.

The recommended priorities for the next phase can be grouped into five areas:

1. **Learner experience**. Reducing unnecessary variation and supporting more coherent, accessible digital learning environments across providers and programmes.
2. **Leadership, capability and organisational capacity**. Strengthening middle-leader capacity and creating the organisational conditions that allow effective practice to be sustained over time.
3. **Inclusion, bilingual provision and wellbeing**. Maintaining focus on digital poverty, accessibility, bilingual digital experience, and safe participation in digital learning as AI tools become more embedded.
4. **Collaboration and improvement**. Supporting structured collaboration that helps effective practice move beyond individual teams and embed more widely.
5. **System conditions shaping digital practice**. Recognising the wider funding, regulatory, partnership and system conditions that influence what providers can realistically implement and sustain in practice.

Looking further ahead

Beyond 2030, digital learning is likely to require increasing coordination at sector level. As interest grows in lifelong learning pathways, shorter-form qualifications and modular learning, learner journeys are likely to become increasingly flexible and less linear. Greater alignment across further and higher education, where this improves learner experience and transitions, is likely to become more important over time.

Medr's oversight of the tertiary sector places it well to help support this work. The opportunity is to move beyond the framework itself towards enabling the wider conditions that effective digital learning depends on: shared expectations, joined-up evidence and the kind of coordinated sector dialogue that individual providers cannot sustain alone.

Conclusion

The sector which Digital 2030 was written for looks different from the one that exists today. In many respects, that reflects the extent to which digital learning is now embedded across post-16 education in Wales, while also highlighting the new challenges that come with a more mature digital environment.

The next phase is less about building new foundations and more about making better use of what is already there. A mature system entering a new phase needs clarity about what it is working towards, support in getting there, and honest recognition of the structural conditions that shape what is possible.

That is what the final phase of Digital 2030 should provide.

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