

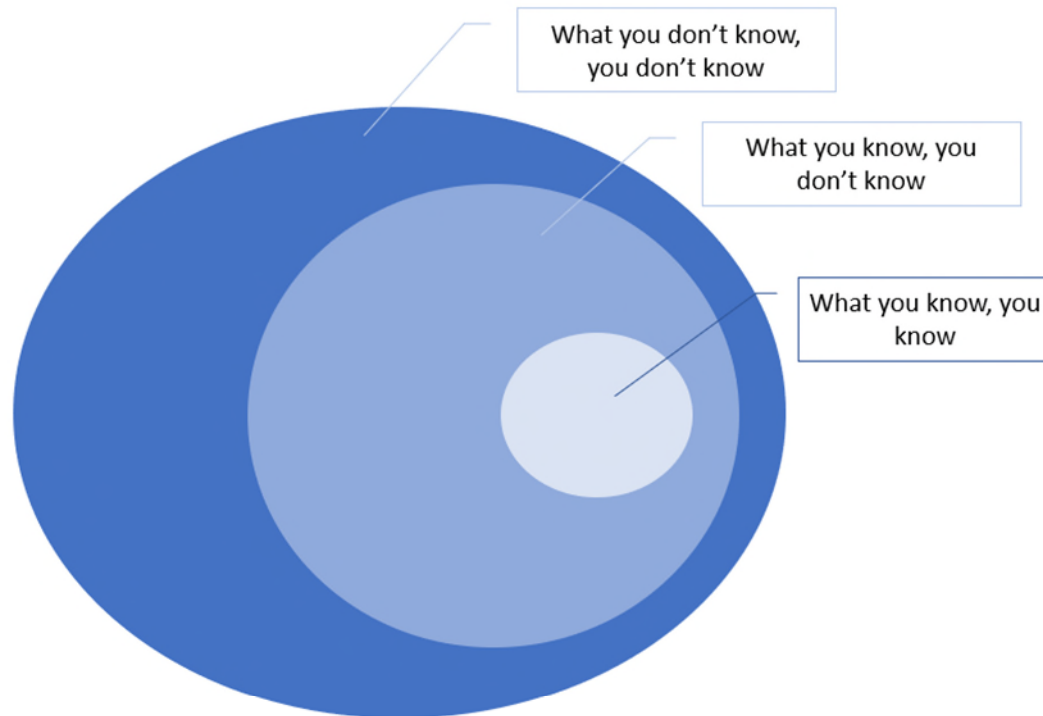
- Pandemic duration
- Pandemic and higher education: 6 propositions
- International student flows
- UK
- Australia

The Covid-19 pandemic is with us till a vaccine is widely available. It cannot be fully contained or decisively ‘solved’ without the absolute isolation of a territory, which in most countries is not feasible.

A best guess is late 2021 or early 2022 for a confirmed and tested vaccine, and later 2022 for broad worldwide distribution, i.e. we have another two years of this condition



# THE PANDEMIC AND HIGHER EDUCATION: 6 PROPOSITIONS



Covid-19 hit in a world of worsening geo-political rivalry, weakening multilateral institutions, implosion of national politics, and growing state controls

1. The pandemic shows that collaboration between nation-states is not solving **global problems**. Cooperation between research universities is more effective
2. The pandemic has a **differentiated impact** in society/economy, and in higher education, according to political cultures and state policies
3. The public good model of higher education has been strengthened, private education weakened and the research university is proving robust in most countries. **Financial sustainability** of institutions is a problem in marketised systems (e.g. Anglophone) and emerging countries (e.g. India and Brazil)
4. In higher education **domestic student demand** will grow (recession shelter effect) despite frequent use of online-only provision. However, problems of graduate under-employment and social equity will intensify
5. **International student mobility** will take at least five years to recover; previous demand/supply patterns will prove robust but with some changes
6. **Online provision** will not replace face to face, but there will be debundling and online only provision in mass higher education in some countries. Face to face and online higher education will become more differentiated

# Early impacts were similar across higher education world, with variations by policy and by resources

*International Association of Universities survey 109 countries, April 2020*

- 59% of institutions had closed completely, most at least partly closed
- 67% replaced face to face teaching with wholly online teaching (85% in Europe but only 29% in Africa)
- 48% had direct Ministry support and 13% received financial support in compensation for lost incomes
- 65% had been consulted by government in relation to public policy on the pandemic
- 21% said they had stopped all research and 52% reported research projects were at risk
- 47% had international students grounded at the institution

**But the experience of the pandemic has diversified since then**

# Deaths attributed to Covid-19: Not inevitable

Anglophone	
United States	205,070
UK	42,001
Canada	9,278
Australia	875
New Zealand	25
Other	
Brazil	142,058
India	96,318
Spain	31,411
Russia	20,385

East Asia	
China	4,739
Japan	1,557
South Korea	407
Vietnam	35
Singapore	27
Taiwan	7
Southeast Asia	
Indonesia	10,473
Malaysia	134
Thailand	59

Data as of 29 September 2020

# Stable public higher education systems with state support are largely pandemic proof

- The crucial asset of the Chinese civilizational zone is the capacity of the population for social responsibility (respect for others) and support for government management of systems in the common interest
- Lockdown policies in higher education are managed according to public health principles, not left to institutions to decide. More decentralization in Japan but only 20% of institutions now returning to face to face
- Private sectors have struggled, e.g. in Japan but national research and public universities are being financially sustained
- In China there is extensive Ministry funding of online development
- South Korean Ministry has offered funding to support 30 public and 50 private institutions that discount the tuition cost of online provision

**East Asian countries/systems all seen to manage the pandemic relatively effectively and this will boost international education across the region in future. Finland, Denmark and Germany are among others that have managed both Covid-19 and higher education effectively**

# INTERNATIONAL EDUCATION

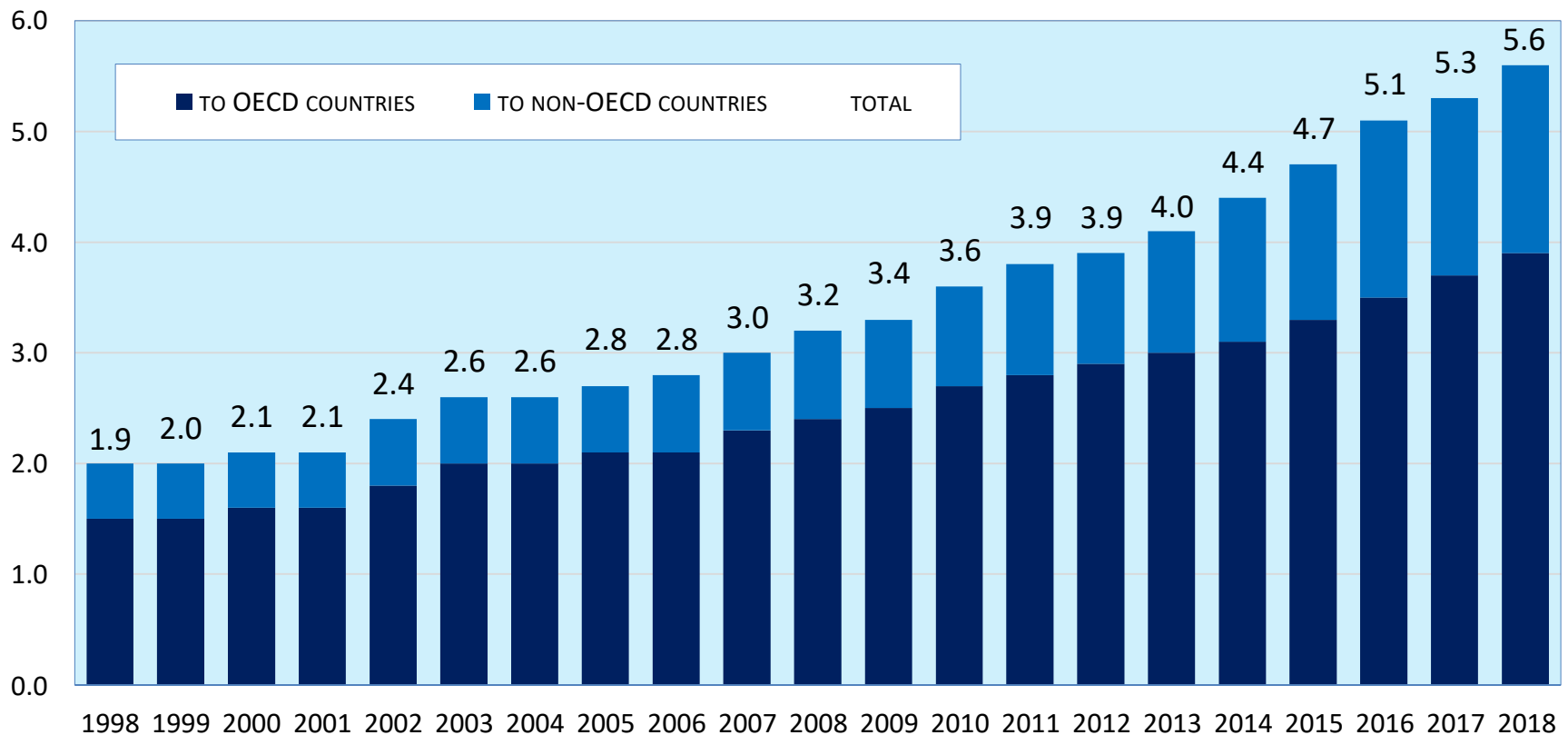




# Before the pandemic

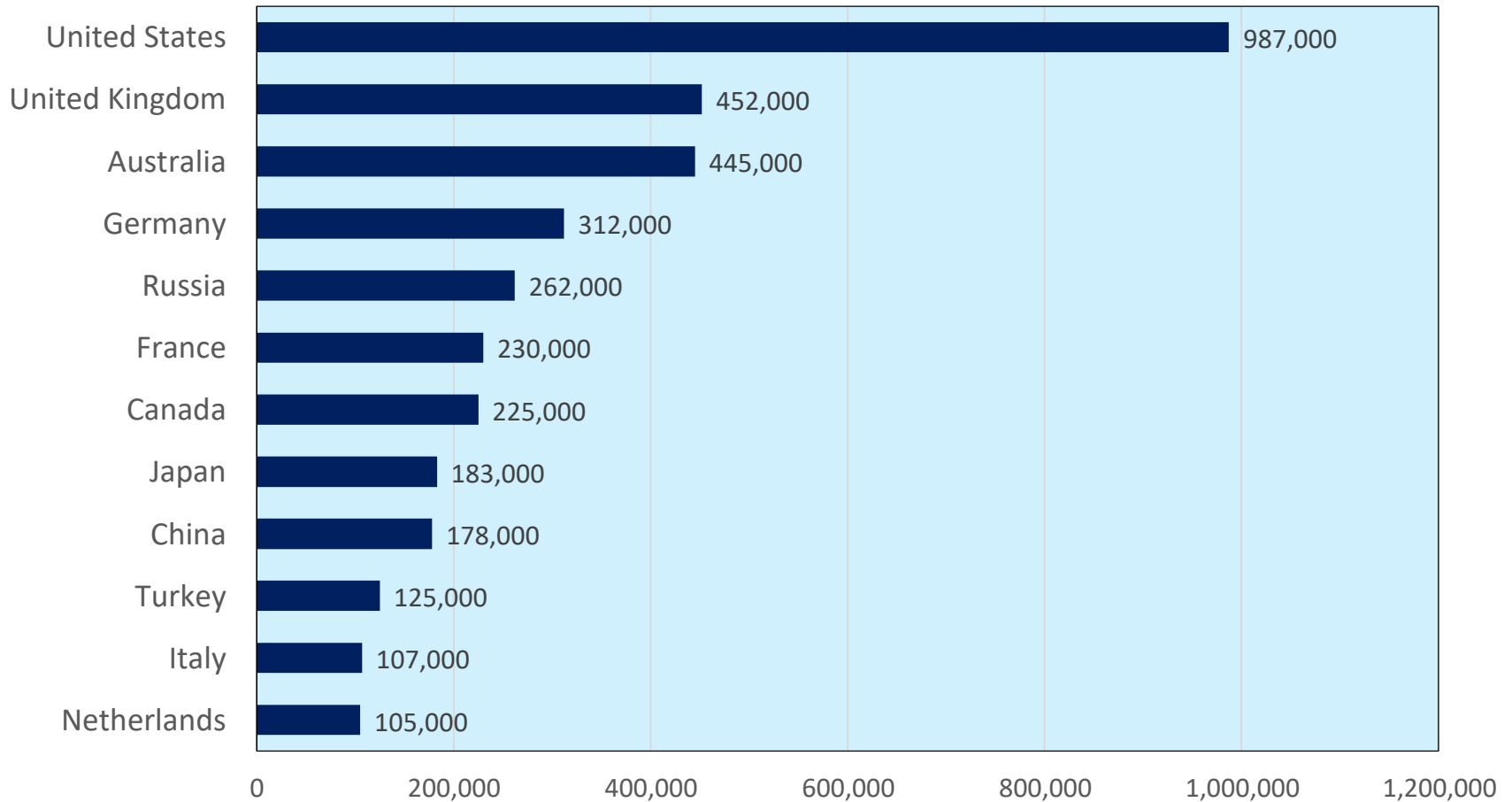
International/ foreign students in tertiary education,  
worldwide numbers, 1998-2018 (millions)

OECD data 2020



# International student mobility in 2018

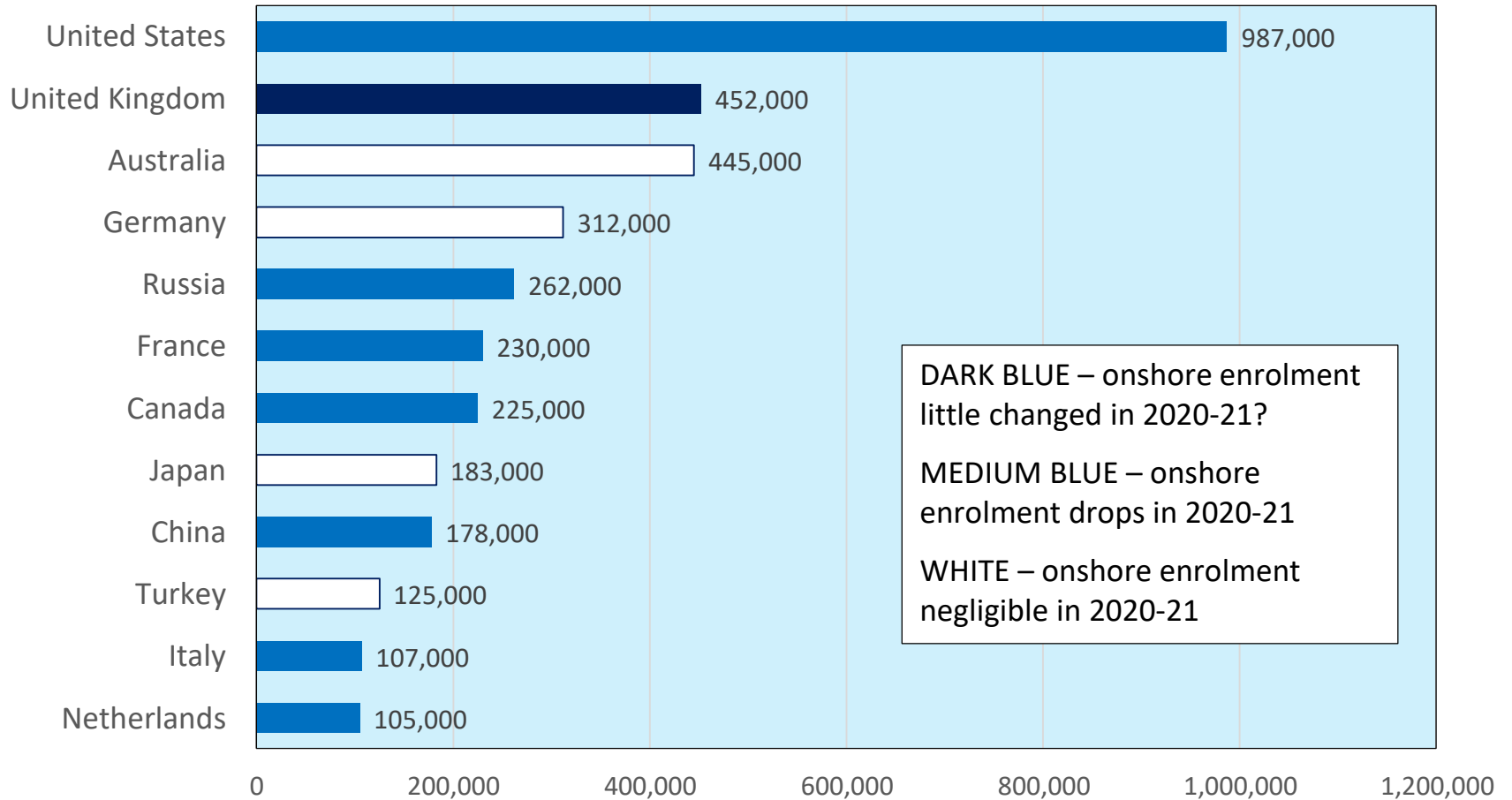
(5.6 million students for education of one year or more)



# The pandemic and international student mobility

- ‘The crisis has affected the safety and legal status of international students in their host country, the continuity of learning and the delivery of course material, and student perception of the value of their degree, all of which could have dire consequences for international student mobility in the coming years’ - OECD, Education at a Glance 2020
- **UK** (452,000 students in 2018): hybrid basis, accepting 7% more non-European international students, growth is in high prestige universities
- **US** (987,000) will be down and will fall further given 4-year restriction
- Inward plane travel is partly or largely blocked into **Australia** (445,000 students in 2018), **Germany** (312,000), **Japan** (183,000), **Turkey** (125,000)
- **Germany** international applications down 20%, **Netherlands** down 50%
- International enrolment impaired in many other countries including **Canada**, **New Zealand**

# International student mobility in 2020-21



# Where will global student mobility recover best?

- **East Asia** (China, South Korea, Taiwan, Singapore, Japan) and some **European** countries (e.g. Finland, Denmark, Germany) have managed the pandemic best and will spring back in higher education. Their universities have strong government support. All these countries can gain ground in the global student market if they want to
- Recent Navitas survey of agents in international student market suggests that **USA** (especially) and **UK** have suffered reputational damage because of the high incidence of Covid-19 cases and deaths. But US and UK will remain high demand nations. Perhaps the long lead will shorten a little
- **Australia** has a lower Covid-19 death toll, but blocking inward flights. Weaker demand than US/UK, slow recovery to pre-pandemic levels.
- **Canada** looks like a long-term winner. It is offering support measures targeted at students affected by the virus, including additional work rights, and access to unemployment benefits

# UK HIGHER EDUCATION

# UK: number of new coronavirus cases per day

7143

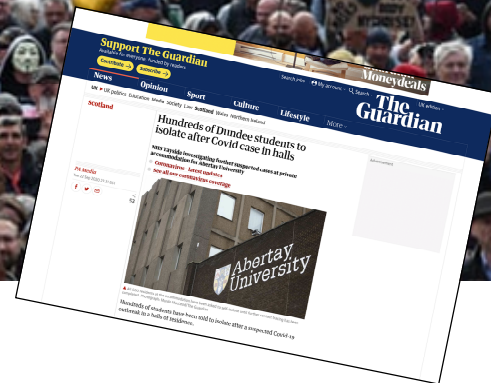


Note: Line chart based on the average number of new cases per day in a given week. Cases are assigned to the date of publication. Data: Public Health England, updated 10 September, 2020

# 11 per cent of people in UK currently under localised lockdown, Covid-19 spreading on campuses

- Individual freedom versus social respect? Less than half of the people who are asked to isolate do so properly
- Young people are the greatest share of new Covid-19 cases

29 Sept news: cases now on 40 campuses, three more universities go into full lockdown (Exeter, Aberystwyth, Queens Belfast) with students isolated in residences





# In 2020-21, UK HE offers blended learning

(face to face classes + online lectures and seminars)

- Health and safety are continually at risk. While social distancing and face covering protocols are readily followed in classes, the main problems are in student residences and student accommodation in university towns. Outbreaks on campus are triggering sudden shifts into full online provision, and students lockdown in residences, at short notice.
- Retaining students will be a challenge – especially under online and lockdown conditions. Many paying £9k fees are currently confined to their rooms and wholly online, with little human contact
- Only 73% of students had adequate online facilities when off campus last term, and on campus not all have computers
- Challenges for widening participation students, immunocompromised students, disabled students. Growing mental health concerns
- Smaller classes and the mix of modes increase teaching loads

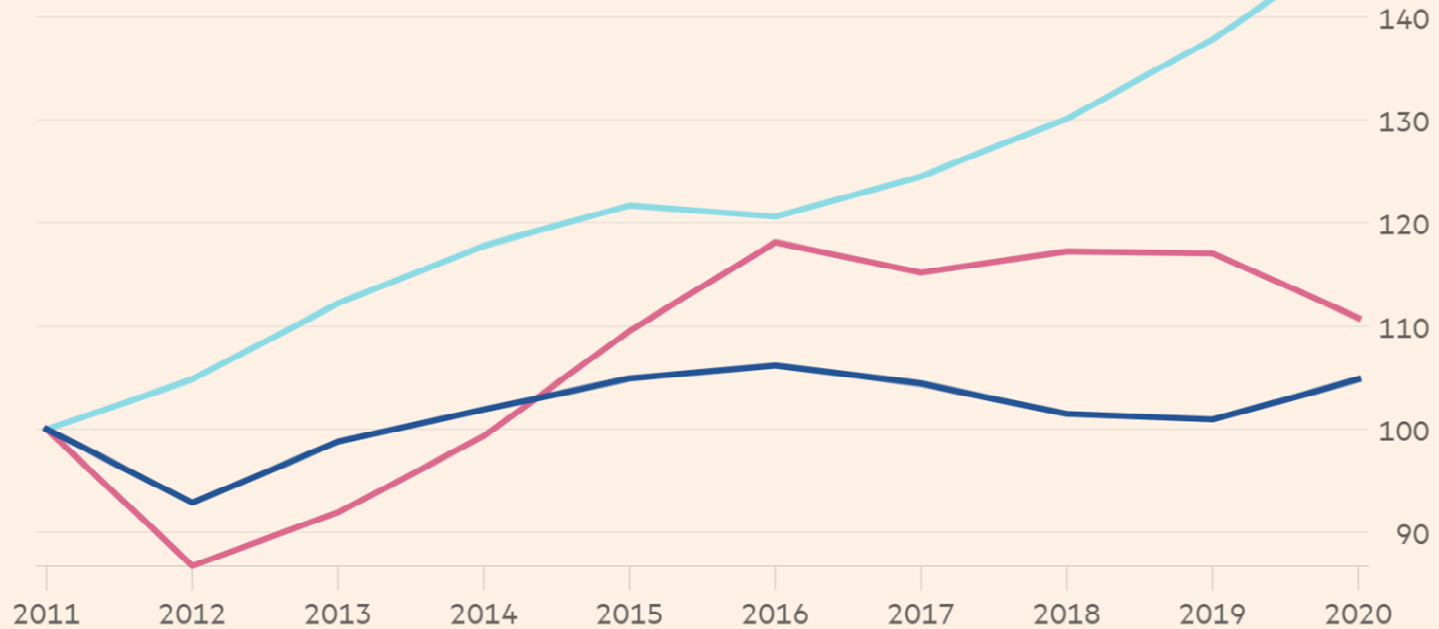
# UK acceptances: total student numbers for 2020-21 seem to be up (for now)

- The strategy of telling students the sector will be open for normal business in 2020-21 has worked. A record 508,090 students have accepted for 2020-21 in UK, though there's no guarantee all will enrol
- 7% increase in acceptances. Not evenly spread. 'High-tariff' institutions acceptances up 11%, mid-tariff up 0.8%, low-tariff down by 0.4%
- EU student numbers are down 5%. But non-EU international student numbers are **up** by 7%
- **Non-EU internationals** are the crucial financial category given the costs of the pandemic and Brexit: **in high-tariff institutions acceptances are up 15%**, in mid-tariff down 7.5%, in low-tariff down 8%
- Despite the demographic trough in the 18-year old population, in mid-tariff and low-tariff institutions the number of UK students have increased to compensate for lost international students. Demand even for possible on-line options is proving more robust than expected

# International admissions have increased at UK universities

Number of new students (rebased to 100)

UK EU Non-EU



Source: UCAS

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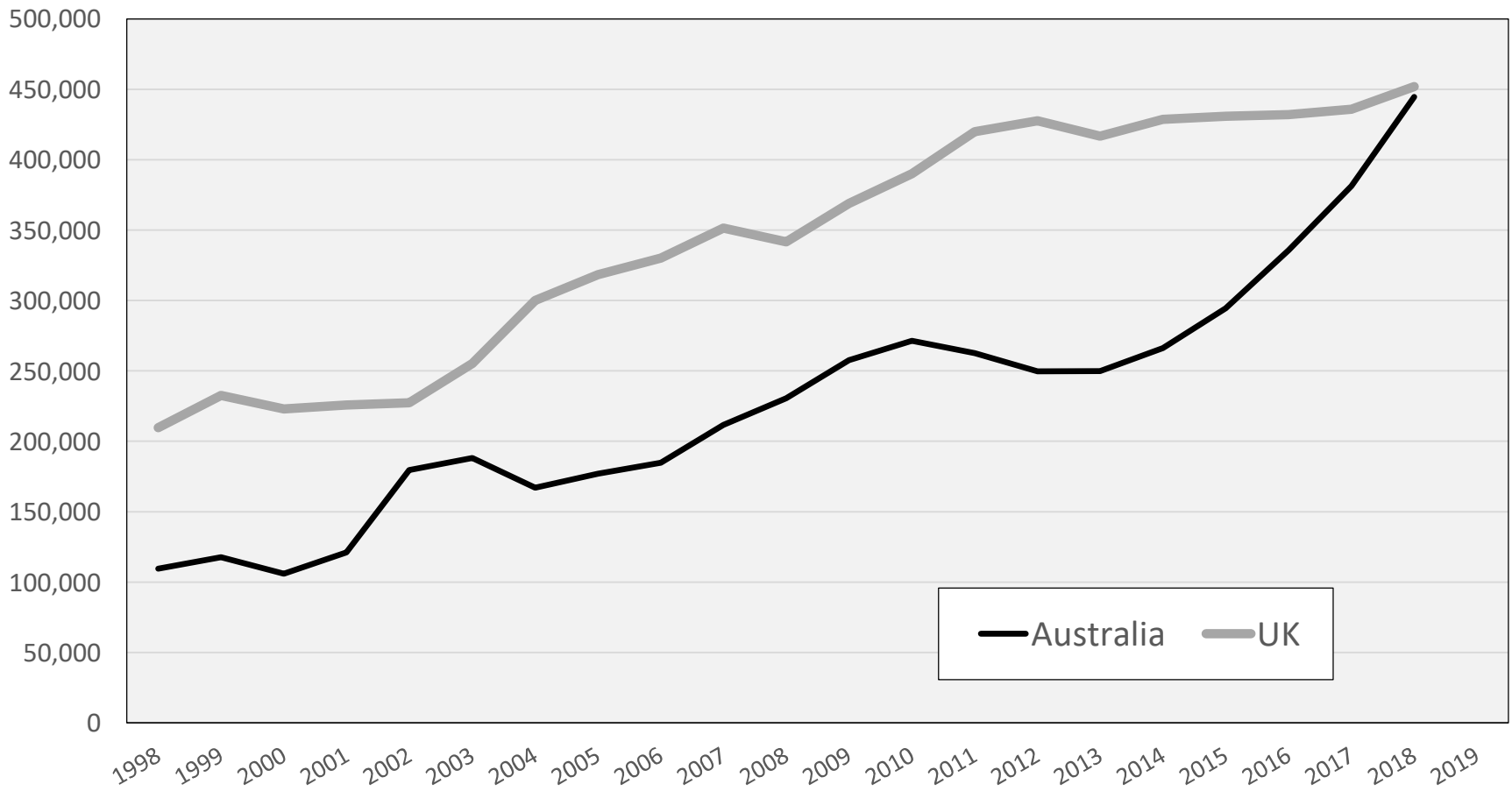
# US campuses are struggling

- In the US almost 100,000 confirmed cases on campus since March including 3000 at the U Georgia, 2000 U Alabama, 2000 U South Carolina
- As in UK the main problems are in student residences and student accommodation in university towns, and sudden local spikes in the pandemic are forcing lockdowns and switch to online only
- Early figures suggest 2020-21 enrolment is down only 2%, local students have been less deterred by online only possibility than expected
- International student mobility severely affected and further threatened by Trump's new policy of 4/2 year visa limits



# AUSTRALIAN HIGHER EDUCATION

# International students, UK and Australia, 1998-



# Shanghai ARWU top 10 countries, 2020

	top 100 universities	top 500 universities
United States	45	137
United Kingdom	8	36
Australia	7	23
China (mainland only)	6	71
France	5	17
Switzerland	5	8
Germany	4	30
Canada	4	19
Netherlands	4	12
Japan	3	14

# Universities in Shanghai ARWU top 500, 2020

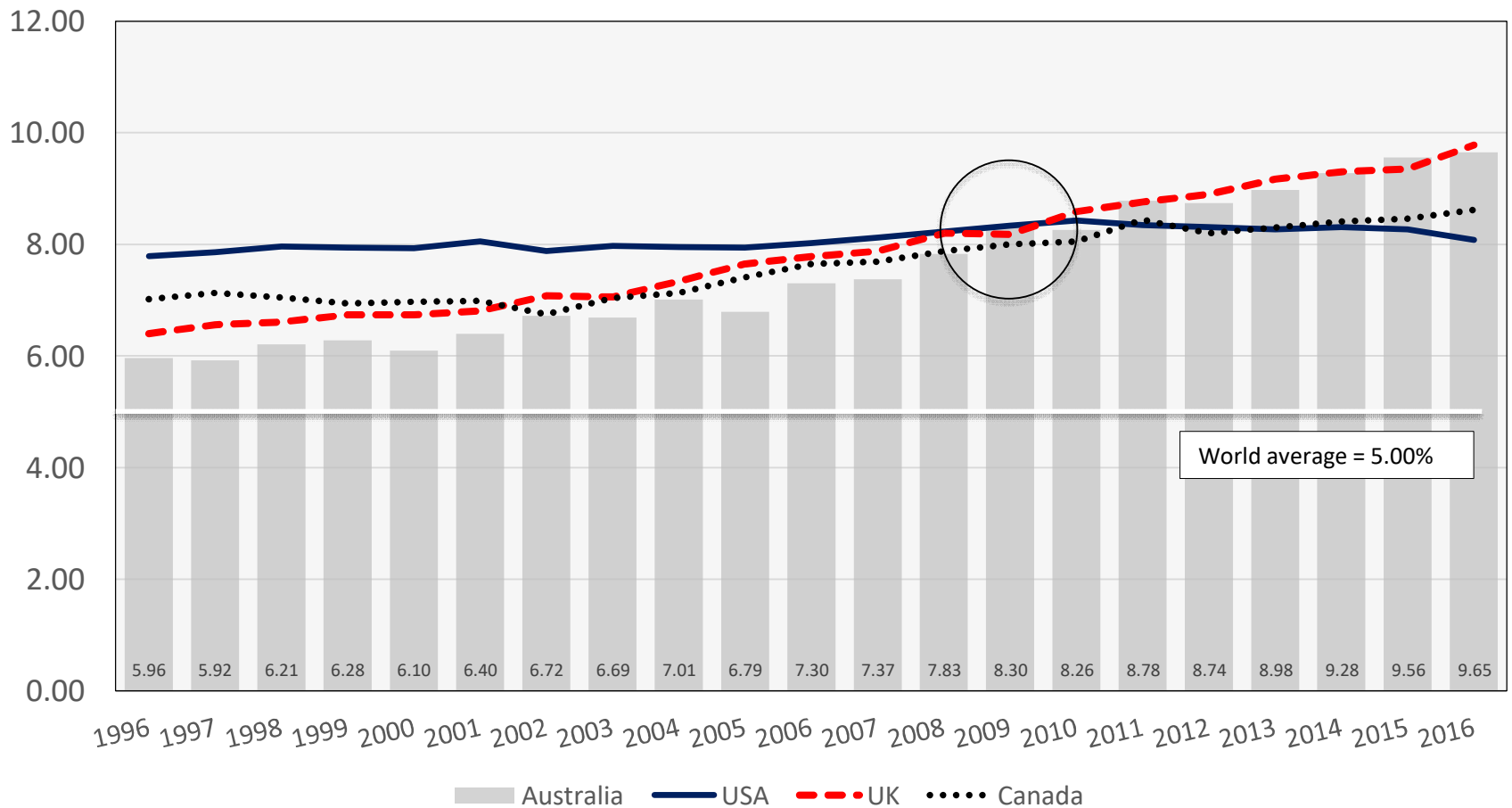
position	universities
1-100	Melbourne (35), Queensland (54), ANU (67), UNSW (74), Sydney (74), Monash (85), Western Australia (85)
101-200	Adelaide (151-200)
201-300	Curtin, Deakin, Macquarie, Swinburne, Tasmania, UT Sydney, Wollongong,
301-400	Griffith, James Cook, La Trobe, Queensland UT, RMIT, Newcastle, Western Sydney
401-500	Flinders

A further 10 Australian universities are ranked between 501 and 1000, so that 33 are ranked altogether. The ARWU is an exclusively research-based ranking



# What a 'failed business model' achieved :

Proportion of science papers in top 5% of disciplinary field on the basis of citations, Scopus



# Australia:

From one third international students, to . . .

- In 2019 one third of Australia's higher education students were international and ***one quarter of the income*** of higher education institutions was from international student fees. Loss of \$3.8 billion in 2020, ranges up to \$350 million at each of Melbourne and Monash
- In 2018 the Go8 spent \$3.1 billion on research from their own funds (60% of research activity), much of it from international education revenues
- Cross-subsidisation puts seven Australian universities into the ARWU top 100
- Modest pandemic death toll is a plus. But international education has been brought to a halt, with inward flights largely stopped. Their rhetoric towards international students in the pandemic was not always warm and welcoming: 'go back where you came from if you don't like it' does not play well
- Significant Chinese media coverage of racist incidents in Australia
- Sooner or later the Cold War rhetoric against China in government and Australian media, echoing US, will impact the international student market (Government would be wise to listen to ANU's Hugh White)

## The 6 propositions

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