

- The pandemic now and in future
- Pandemic and higher education: propositions
- The Anglophone zone, Europe, East Asia, India
- International student mobility
- Teaching, learning, research, administration, finance, system sustainability

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.

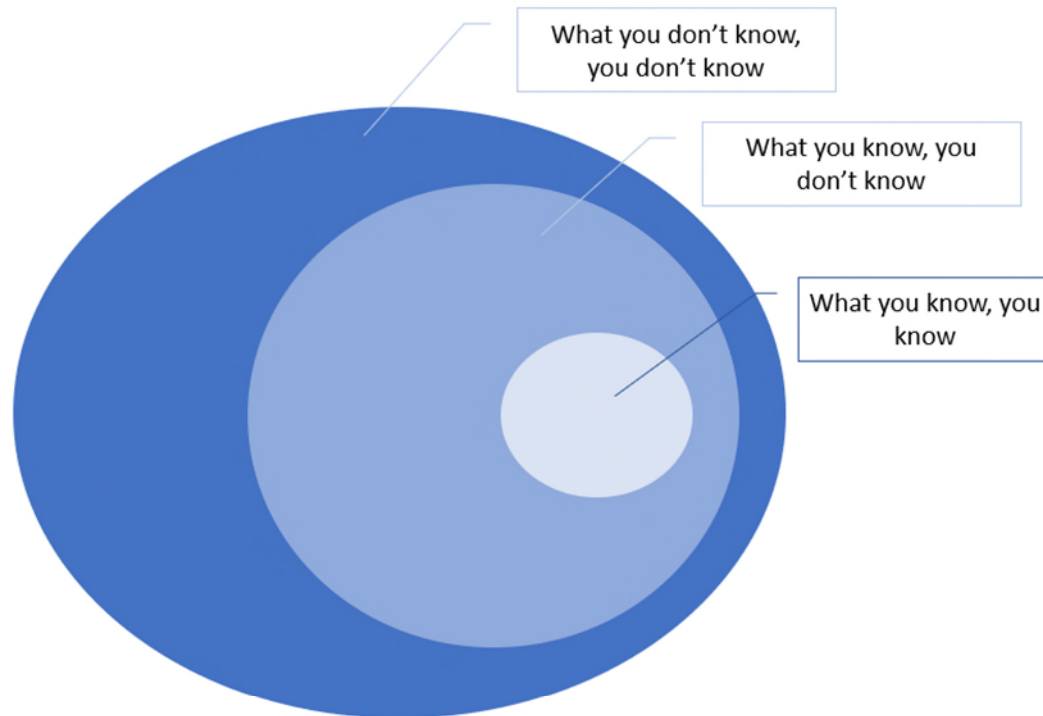
A best guess is late 2021 or early 2022 for a confirmed and tested vaccine, and later 2022 for broad worldwide distribution, i.e. 2021-22 will be like 2020-21 on campus



The challenges of the last six months will be partly institutionalised over two years or more

- What testing facilities are on campus? How is demand overload managed?
- What happens to immunocompromised and disabled students on campus?
- What proportion of students have access to online learning?
- What measures are being taken to tackle potential drop-out?
- What happens to socio-economically disadvantaged students in relation to (1) online access (2) support and retention?
- What facilities are in place to manage student mental health problems on a larger scale? Are certain categories of students especially vulnerable?
- What happens when there is a spike in student requests for financial help?
- In full lockdown, is student behaviour manageable, and is it managed?
- Should online only students receive tuition fee discounts?
- Are institutions financially sustainable? What kind of financial support does government provide? Are lost student revenues replaced?
- Is research maintained? What are the opportunities for doctoral graduates?

THE PANDEMIC AND HIGHER EDUCATION: 10 PROPOSITIONS



Covid-19 hit amid worsening geo-political rivalry, weakening of multilateral institutions, implosion of national politics, and increasing state controls

- 1. The pandemic shows that collaboration between nation-states is not solving global problems, but cooperation between research universities can**
- 2. The impact of the pandemic in society/economy, and in higher education, is highly differentiated by divergent state policies and political cultures**
- 3. In the crisis the public good model of higher education is strengthened, and the research intensive university, but not all models, is fairly robust**
- 4. Financial sustainability of institutions is a major issue in the marketised systems (e.g. Anglophone) and emerging countries (e.g. India and Brazil)**
- 5. The differentiating effects between systems will have long term effects**
- 6. In higher education, unless there is system collapse, domestic student demand will grow despite frequent reliance on online only provision**
- 7. Graduate under-employment and social equity problems will intensify**
- 8. International student mobility will take at least five years to recover; old demand/supply patterns will prove resilient but with some modification**
- 9. Online will not replace face to face provision in general, but there will be more debundling and online only provision in mass higher education**
- 10. Face to face and online higher education will become more differentiated, emerging as distinct products and in some countries, different tuition prices**

GEO-POLITICAL RIVALRY AND UNIVERSITY COOPERATION



A thirty-year geo-political struggle?

Trade and the economy, global technological leadership, geo-strategic rivalry in Asia and beyond, ideological war



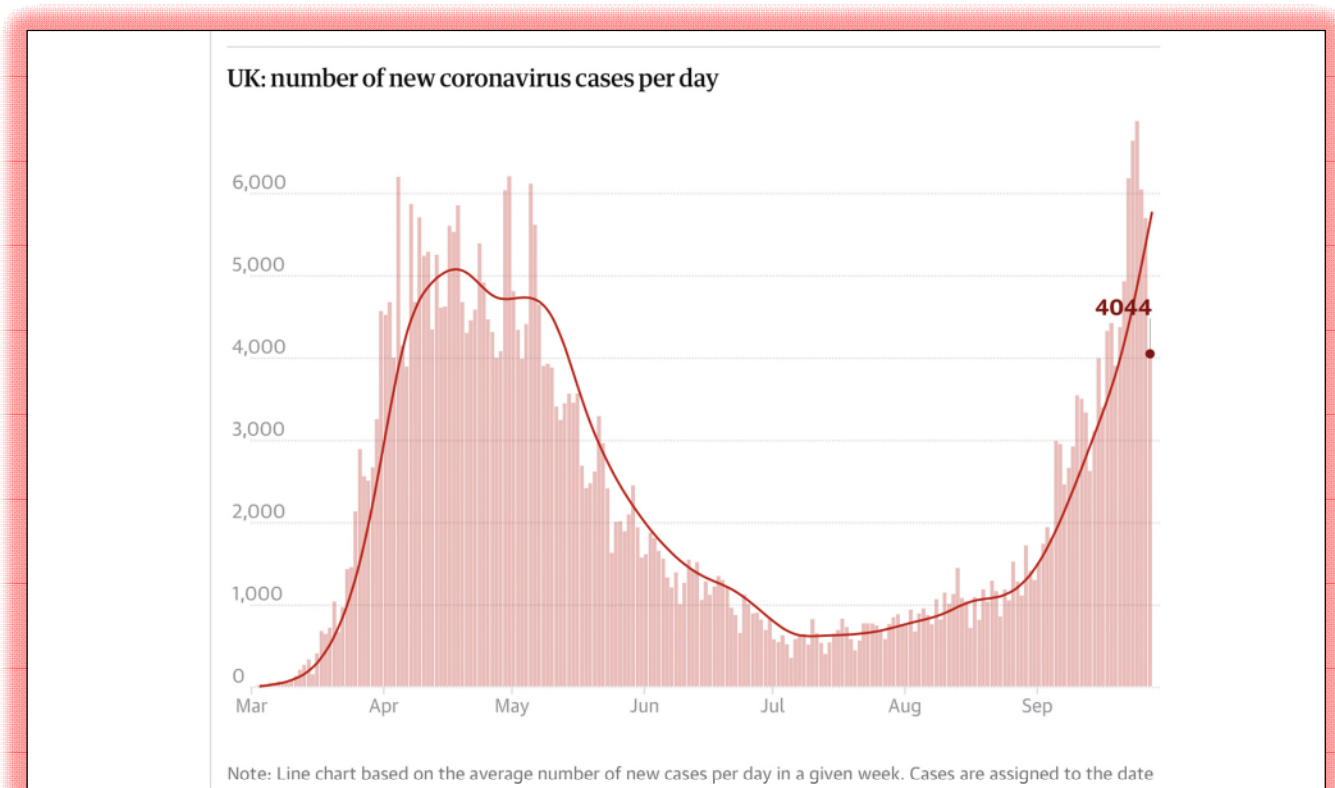
China-US collaboration in science

- In 2018 scientists from China and the United States collaborated on 55,382 jointly authored papers in Scopus. This is by far the largest nation-to-nation collaboration in world science
- The China-US cooperation in research has grown rapidly in recent years. There were *26 times* as many joint papers in 2018 as in 1996
- In Covid-19 research 20% of papers with China authors and 43% with US authors have international co-authors, over two thirds are open access
- Measures taken by the US to retard exchange and cooperation in science (e.g. visa restrictions, border hostility to doctoral students, pressure to relinquish joint appointments and multiple projects) are strongly opposed by scientists and university leaders in both countries
- The struggle for the soul of science: Scientific globalism versus technological nationalism
- *University autonomy and academic freedom are crucial*, if scientists are to cooperate amid geo-strategic rivalry and assertion of security issues

THE PANDEMIC AND THE ANGLOPHONE COUNTRIES



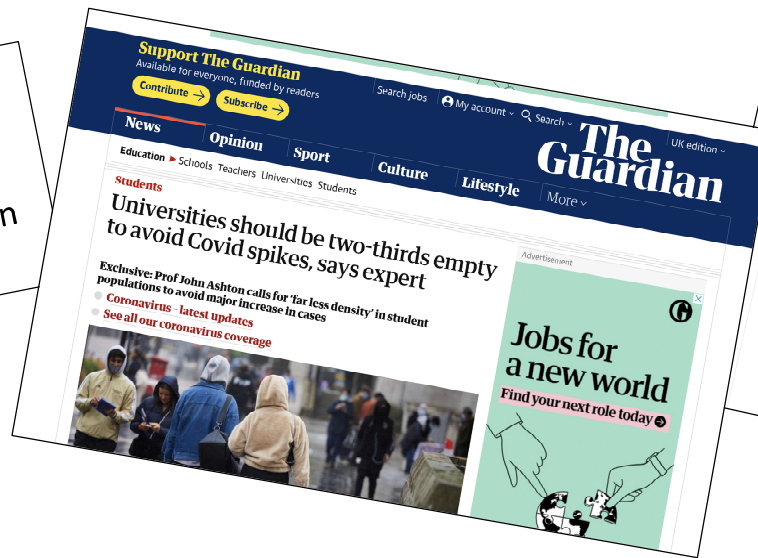
	Death toll 28 September 2020
United States	204,756
United Kingdom	41,988



11 per cent of people in UK are currently living under localised lockdown conditions

- Birmingham lockdown measures started this week –
'The spread appears to be primarily occurring through social interactions, especially private household gatherings, and workplaces where social distancing is not being observed'
 - Ian Ward, leader of Birmingham City Council)
- Less than half of the people asked to isolate do so properly
- Young people are the greatest share of new Covid-19 cases

23 Sept news: 80 confirmed cases at U Liverpool, Manchester Met struggling to contain its outbreak



Vulnerable to drop in non-EU international fees in UK

Institution	£s 2018-19	% income
Instituto Marangoni	5,583	56.7
AA Sch Architecture	10,736	54.5
Regent's U London	21,435	48.4
Royal College Art	30,601	40.9
Heriot-Watt U	87,890	37.0
U Arts London	116,221	36.1
London Business Sch	52,603	31.6
City U London	76,610	31.4
U London	52,395	29.9
Coventry U	111,259	27.7
LSE	113,774	27.0
U Sunderland	35,095	25.4
U St Andrews	64,800	25.2
U Warwick	116,731	24.2

Institution	£s 2018-19	% income
Goldsmiths College	31,316	23.6
Queen Mary UL	113,476	23.5
U Westminster	47,702	22.7
U Durham	86,106	22.6
Cons Dance & Drama	5,099	22.2
U Manchester	242,202	22.1
U Sussex	71,025	21.9
U Liverpool	125,612	21.7
U Reading	67,377	20.9
U Sheffield	148,951	20.8
U Glasgow	141,969	20.6
UCL	299,751	20.2
U Lancaster	63,863	20.0

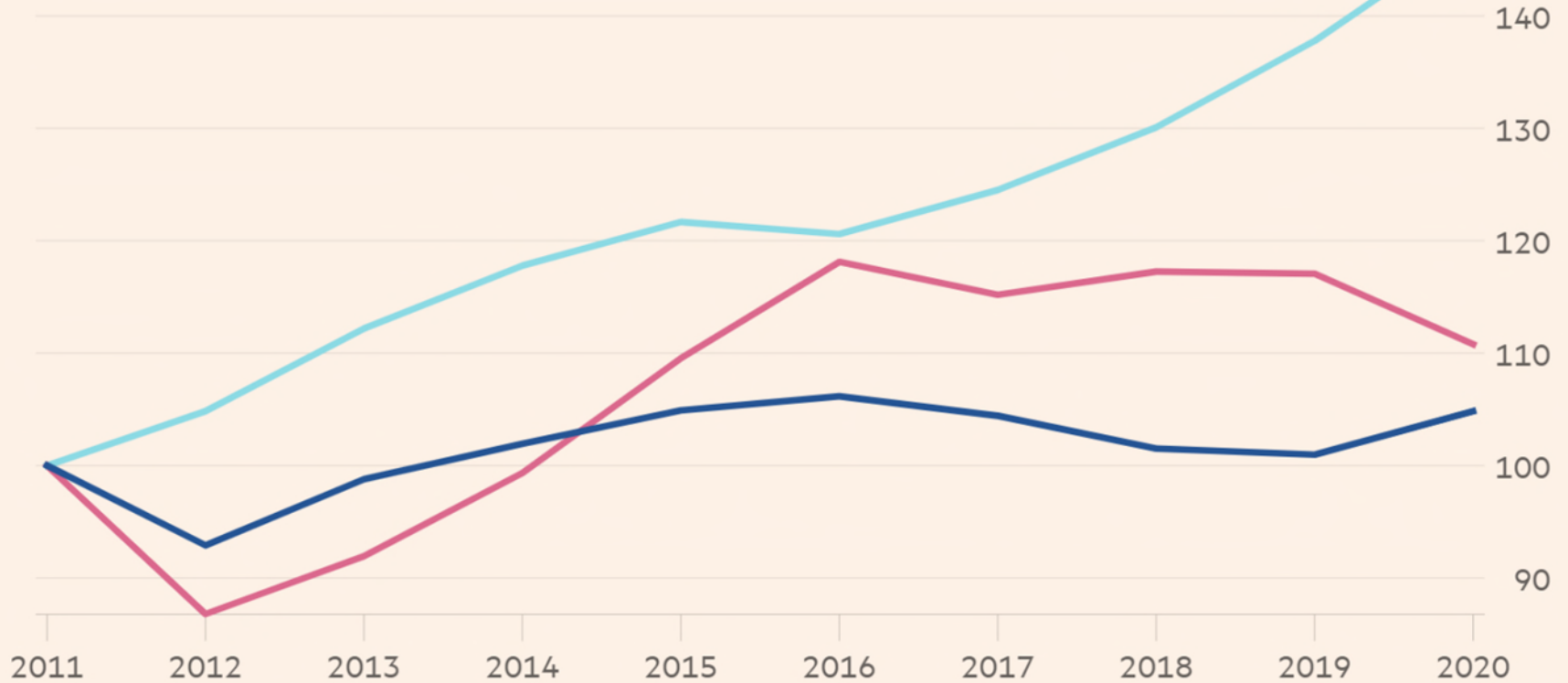
UK acceptances: Numbers for 2020-21 seem to be sustained (for now)

- 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 demographic trough in 18-year old population, in mid-tariff and low-tariff institutions UK students have increased to compensate for lost international students

International admissions have increased at UK universities

Number of new students (rebased to 100)

UK EU Non-EU



Source: UCAS

© FT

In 2020-21, UK HE offers blended learning

(face to face classes + online lectures and seminars)

- In the market system financial sustainability is not guaranteed and institutions have had to feint and manoeuvre to sustain enrolment. Promising face to face education has helped sustain numbers
- Though enrolments may exceed 2019-20, retaining students will be a challenge – especially under online and lockdown conditions
- 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.
- At present many students in North and Midlands paying £9k fees are confined to their rooms and wholly online
- Smaller classes and the mix of modes (some students will be wholly online) are substantially increasing teaching loads
- Only 73% of students had adequate online facilities last term

Confirmed cases
6,974,416
(Yesterday: +52,070)

Deaths
202,706
(Yesterday: +356)

Deaths per capita

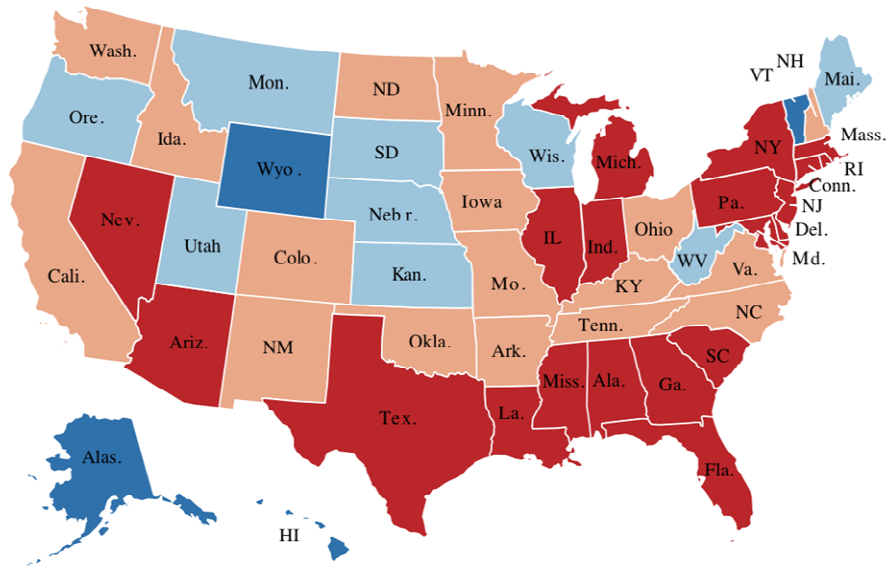
Cases per capita

Increase in cases

There are currently 202,706 deaths confirmed to be caused by Covid-19 in the US. With an estimated population of 322m, that equals to about 63 deaths per 100,000 Americans.²

Number of confirmed Covid-19 deaths per 100,000 Americans

- Fewer than 10
- At least 10 per 100k
- At least 25 per 100k
- At least 50 per 100k



Last updated: 25 Sep 8:25am EST

Source: Maps are updated daily at 12am ET using **state-level** and county-level **case** and **death** figures reported from Johns Hopkins University. **State populations** were provided by Johns Hopkins CSSE.

¹Daily increases were found by taking the case and death figures from the timestamp shown above and comparing them to the data from **7 days ago**

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
- International student mobility is affected and now is further threatened by Trump's new policy of 4/2 year visa limits
- Despite this early figures suggest 2020-21 enrolment is down only 2%



EAST ASIA AND INDO-PACIFIC



The pandemic in East and SE Asia

Country	Deaths attributed to Covid-19
China	4,739
Japan	1,548
South Korea	406
Vietnam	35
Singapore	27
Taiwan	7
Indonesia	10,386
Malaysia	134
Thailand	59

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

- Crucial cultural asset in Chinese civilizational zone is capacity of population for social responsibility (respect for others) and support for government management of common systems in the common interest
- Lockdown policies in higher education managed centrally not left to institutions to decide
- Private sectors have struggled but national research universities are financially sustained
- In China extensive Ministry funding of online development
- In South Korea Ministry has offered funding to support institutions that discount the tuition cost of online provision
- East Asian systems all seen to manage the pandemic relatively effectively and this will boost international education across the region in future

Bad times for higher education in India

- New national policy provides forward pathway for higher education BUT
- Nationally 95,542 deaths attributed to Covid-19 by 28 September 2020; it is likely that this is a substantial under-estimate
- Unevenness by state, with Kerala the standout in managing Covid-19
- Strong reliance on online education which Modi government hopes to take into the post-pandemic era
- However, digital divide is very severe with only 36% of the population having smart phone access, less than one in ten students outside major cities having adequate facilities for online, lower in caste groups



Australia:

From international students as one third of all enrolled students in higher education, to . . .

- In 2019 one third of Australia's higher education students were international students, almost 500,000, mostly from E, SE and S Asia
- ***One quarter of the income*** of higher education institutions was from international student fees
- A large part of Australia's research has been funded from international education, putting seven Australian universities into the ARWU top 100
- Modest pandemic death toll. But international education has been brought to a halt, with inward flights largely stopped
- New government policy package reduces funding rate for *domestic* students and enforces 6-month 'work ready courses'
- Universities now expect to lose one staff member in every ten, research is the largest concern but all operations are affected
- Government is imposing a veto over universities' China links
- Rhetoric towards international students not always warm and welcoming

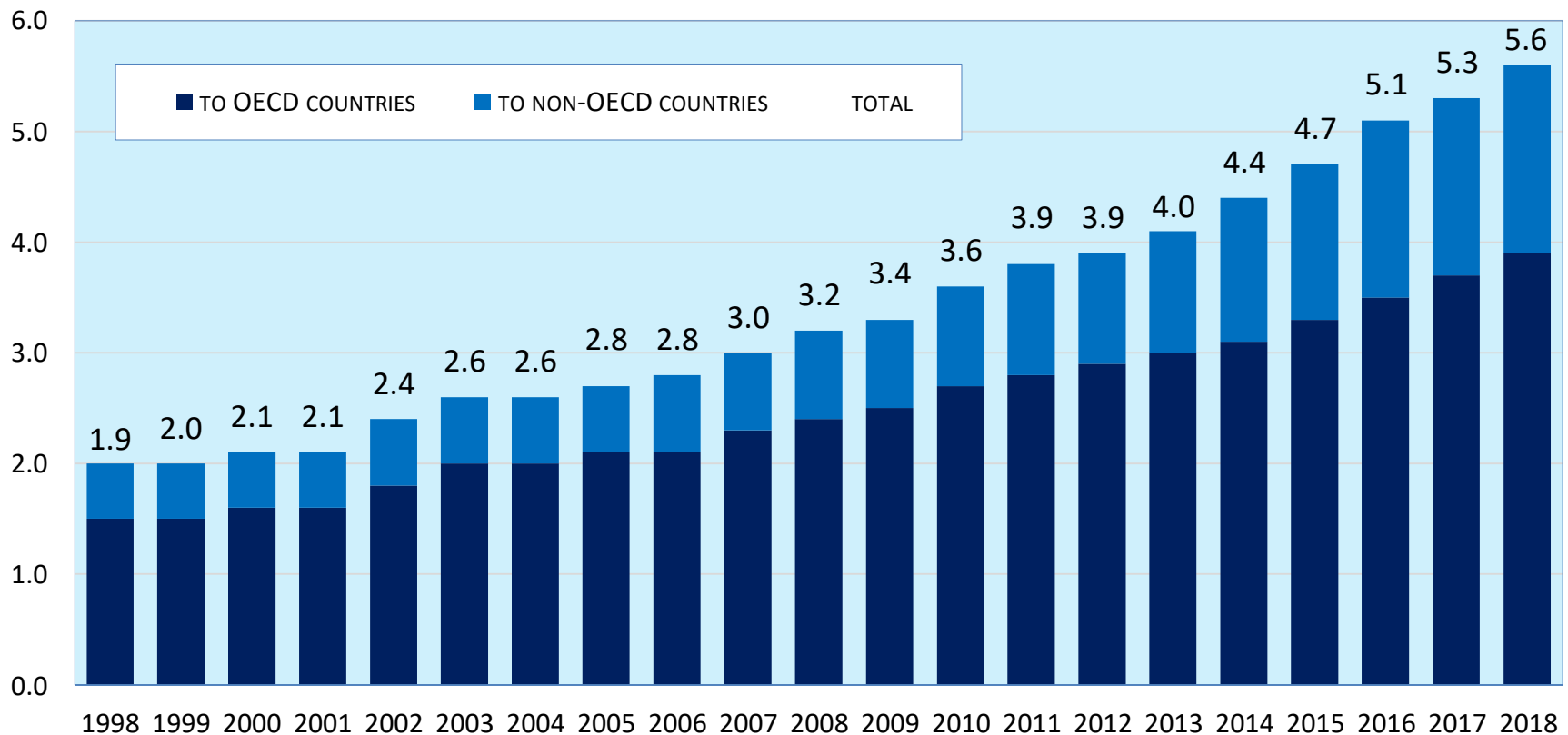
INTERNATIONAL EDUCATION



Before the pandemic

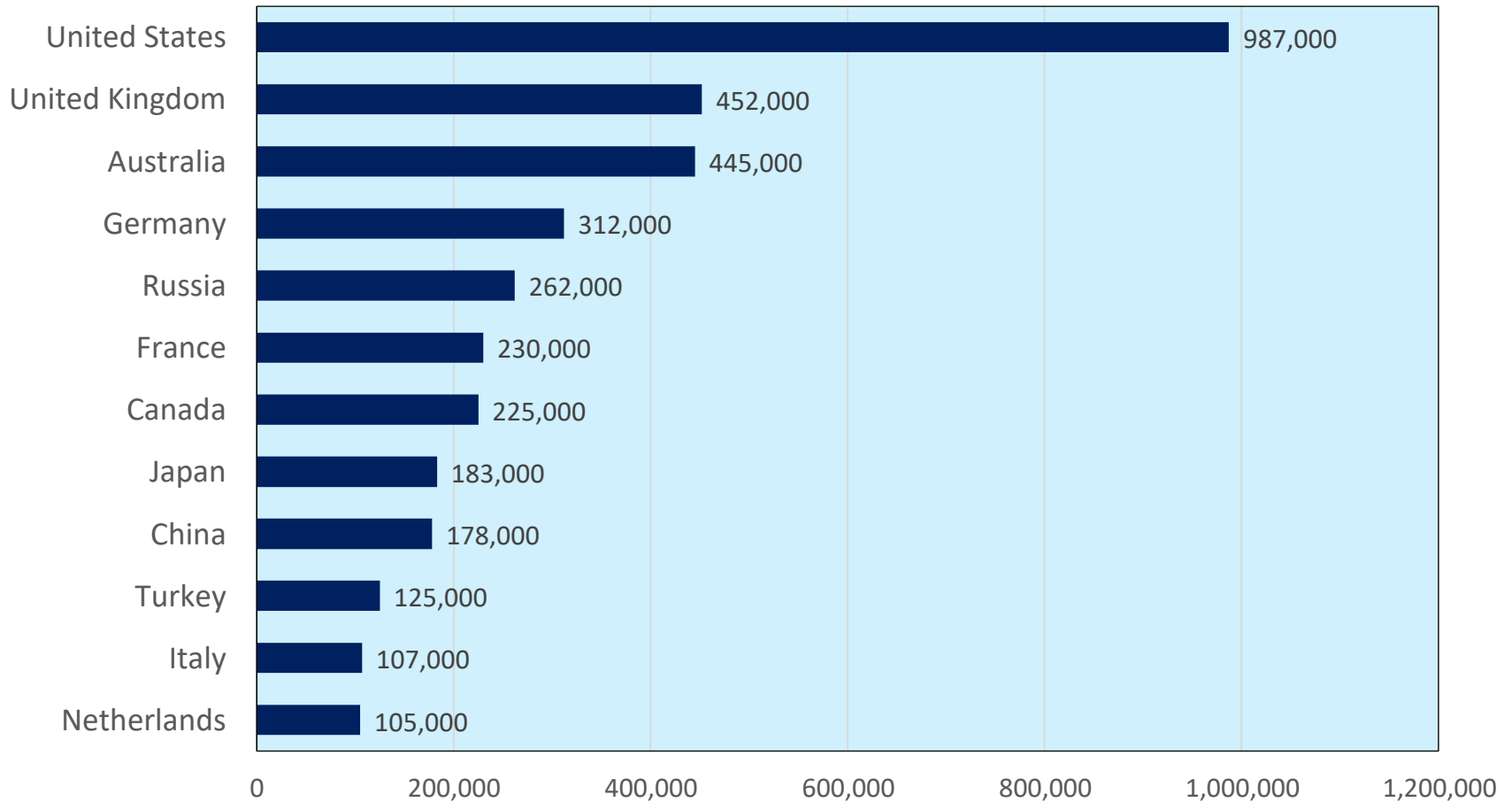
International/ foreign students in tertiary education,
worldwide numbers, 1998-2018 (millions)

OECD data 2020



International student mobility in 2018

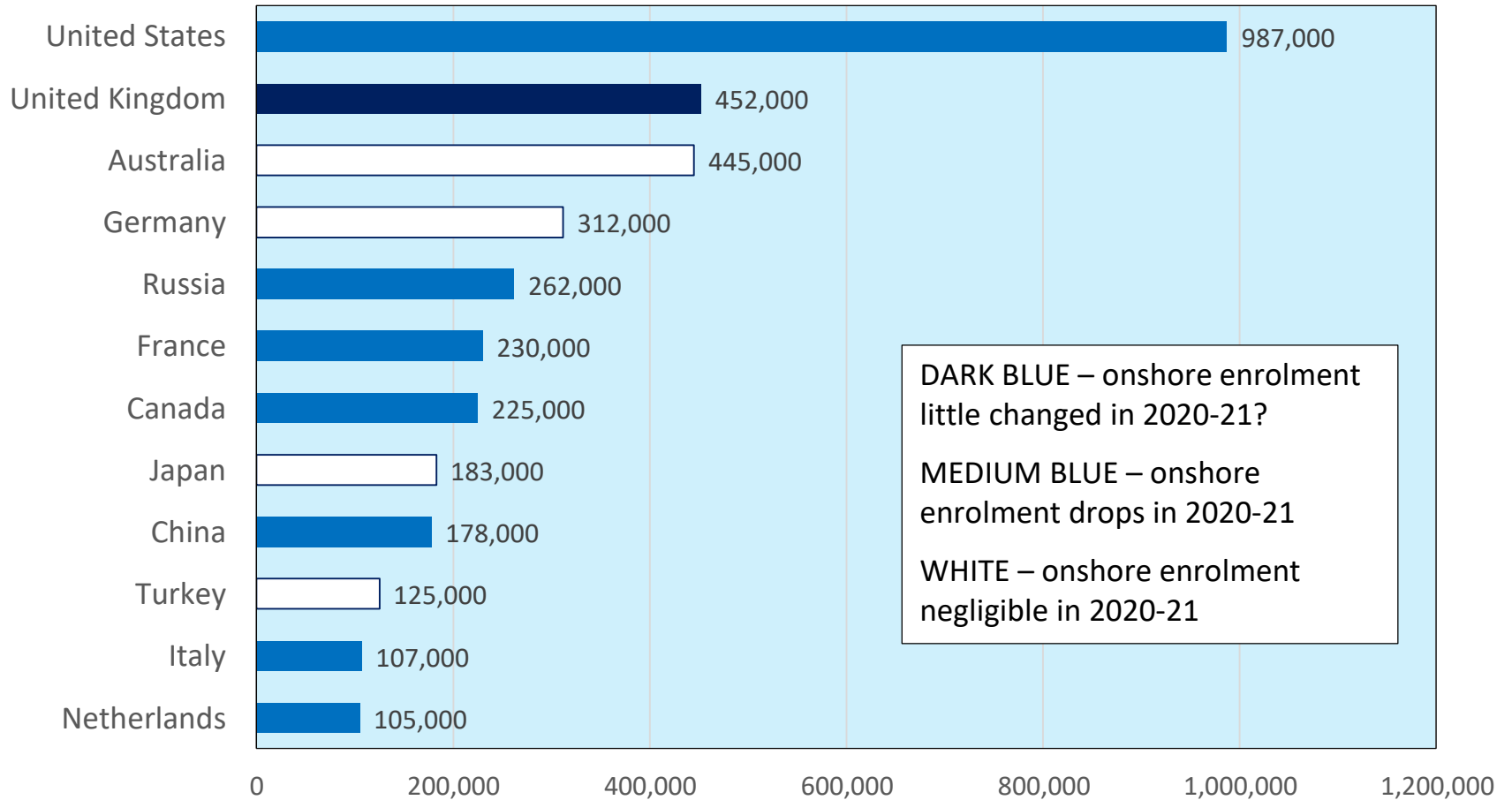
(5.6 million students for education of one year or more)



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

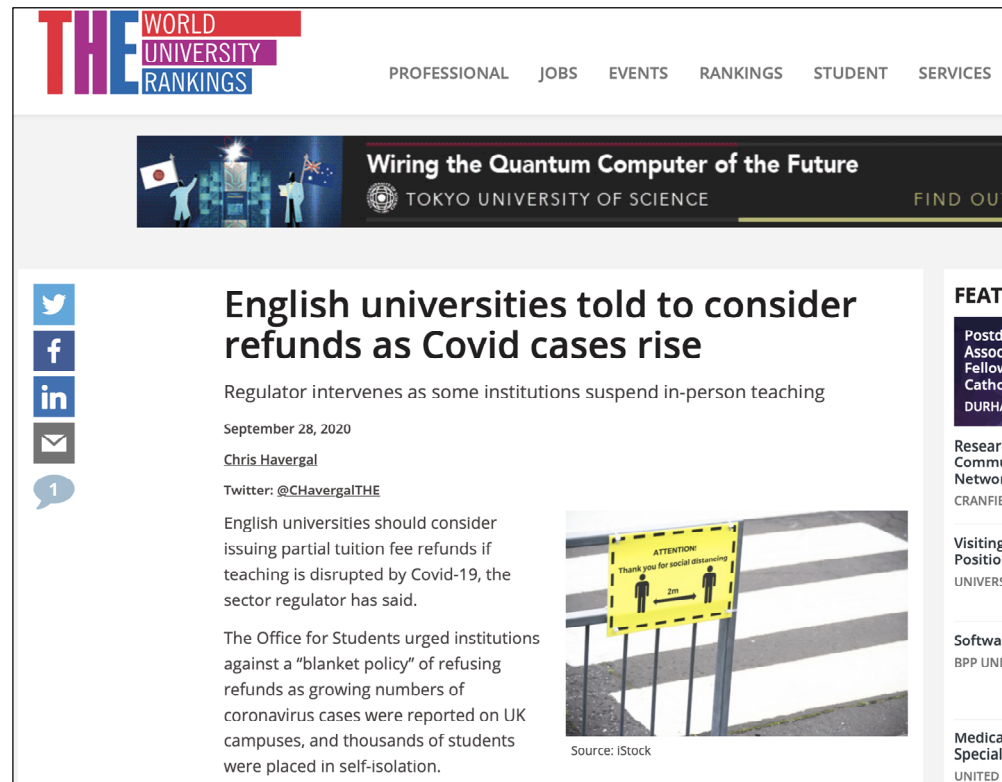


Where will global student mobility recover best?

- **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 remain high demand nations
- **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

Recognising two different teaching/learning products in higher education ?

- Tuition fees for online only courses should be discounted – Andreas Schleicher, OECD Director for Education and Skills, June 22, 2020



The screenshot shows a news article on the THE World University Rankings website. The article is titled "English universities told to consider refunds as Covid cases rise" and is dated September 28, 2020. The author is Chris Havergal. The article discusses the Office for Students' recommendation for partial tuition fee refunds due to the impact of COVID-19 on in-person teaching. A yellow social distancing sign is included in the article, with the text "ATTENTION! Thank you for social distancing 2m". The source of the image is cited as iStock.

THE WORLD UNIVERSITY RANKINGS

PROFESSIONAL JOBS EVENTS RANKINGS STUDENT SERVICES

Wiring the Quantum Computer of the Future
TOKYO UNIVERSITY OF SCIENCE

English universities told to consider refunds as Covid cases rise

Regulator intervenes as some institutions suspend in-person teaching

September 28, 2020

Chris Havergal
Twitter: @CHavergalTHE

English universities should consider issuing partial tuition fee refunds if teaching is disrupted by Covid-19, the sector regulator has said.

The Office for Students urged institutions against a "blanket policy" of refusing refunds as growing numbers of coronavirus cases were reported on UK campuses, and thousands of students were placed in self-isolation.

ATTENTION! Thank you for social distancing 2m

Source: iStock

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The state is back and is proving to be decisive in higher education and science

- ***The state is crucial to our collective survival:*** those higher education systems where the state takes effective responsibility for public higher education and science handle the pandemic better, will recover better
- ***Global cooperation is crucial to our collective survival:*** Yet a more active state threatens to infringe higher education, and especially scientific globalism, which is the hope of the world



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