

## Report from the Horizon Scanning Panel

### Issue

1. The board is kept informed of the Horizon Scanning Panel by receiving a report on the outcomes of each meeting. The enclosed report summarises the outcomes of the meeting held on 16 September 2019. This report will be supplemented by an oral report given by the chair of the panel.

### Recommendations

2. The board is invited to receive the report of the Horizon Scanning Panel.

### Main points from September meeting

3. There has been increasing demand for (and participation in) higher education across the globe, with particularly strong demand for English higher education from China.
4. As participation has increased, there has been a decrease in 'horizontal diversity' - provision has tended towards large non-specialised institutions.
5. Chinese higher education provision is rapidly increasing in esteem, overtaking (or on track to overtake) English and American rivals.
6. Of the new and innovative forms of provision considered, none are operating at scale yet, and disruptive innovation, possibly by definition, will come from outside the regulated sector.
7. Following the panel's recommendations, the executive added three projects to the project pipeline:
  - Carrying out an assessment of our regulatory framework, looking at its impact on innovation
  - Exploring whether novel data sources (e.g. web scraping) could be used to map provision and/or innovation and build an evolving classification
  - A project to better understand the business models of higher education providers, with a view to informing how we think about their incentives and how our interventions affect them.

### Further information

8. Available from Sir Michael Barber.

## Horizon Scanning Panel report

September 2019

### Guest speaker – Simon Marginson

9. The panel received a presentation that looked at recent areas of work that Simon has explored in the higher education landscape. The presentation focused on Simon's book entitled 'High Participation Systems of Higher Education'. The high participation system study (2013-18) that underpinned the book was discussed along with issues of global mobility and opportunities and challenges to the higher education sector.
10. Following the presentation, the panel debated the following points:
  - The UK has done well to create high research intensity, how can this be sustained with current levels of funding?
  - The importance of linking up the school system with universities
  - The extent to which higher participation globally has led to a reduction in diversity of provision
  - The need to balance research and teaching provisions
  - Whether online learning has been able to compete with the formative experience that the best of higher education has to offer.

### International student mobility

11. The panel received a paper that set out some of the main features of worldwide higher education student mobility over recent years which focused on the following:
  - The overall movement of international students
  - The number of international students
  - Trends in historically large markets (for English provision) such as China and India
  - The financial impact of international students on providers.

### Models of higher education

12. The panel received a paper on the themes of innovation and disruption by providing examples of alternative models of higher education from around the world that might signal the beginning of a shift in the dominant model in England. The following points were debated:
  - Elasticity of demand for higher education
  - The importance of credentialing and accreditation for providers
  - Collaboration and partnerships between academic and non-academic organisations.

Final thoughts

13. The chair asked members to consider any signals/themes that the OfS should consider looking at. Some of the suggestions were as follows:

- The interests of students needs to continue to be at the forefront of OfS decision making
- Innovation challenges could be utilised to promote new innovative models of provision
- The OfS should seek to understand new platforms in technology which might ease financial pressures for international students
- The OfS should continually monitor and check its own ambition
- The OfS should continue to reflect on diverse views on what the higher education sector may look like in the future, to feed into its approach to regulation.

Future meetings

14. The next meeting will take place on 25 November 2019.