

## 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 18 May 2020. 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 May meeting

3. The panel discussed a paper on the overview of 2020, setting out a proposal for the work of the panel for the remainder of the 2020 calendar year. The proposal was intended to add structure to the panel's work for the year, with a view to producing meaningful outputs that can be used by the executive and board in their development of the OfS's next strategy beyond 2020-2021. The panel agreed to the proposal subject to their comments and feedback. The proposal was subsequently developed further and is being reviewed by the panel members (please see Annex A, informing the OfS strategy development, for more detail).
4. The panel discussed a paper on the coronavirus (COVID-19) impact on higher education, posing a list of questions and resources for the panel to consider. Many of the points raised go beyond the remit of the OfS, and the panel agreed that the board and executive would need to carefully consider their role in relation to these issues.
5. Further to the paper on the overview of 2020, the panel discussed a paper on the future of higher education, containing a list of articles, references and resources to inform the panel's contribution to the development of the next OfS strategy.

### Further information

6. Available from Sir Michael Barber.

## Horizon Scanning Panel report

May 2020

### Overview of 2020

7. The panel received a paper setting out a proposal for the work of the panel for the remainder of the 2020 calendar year. This proposal incorporated the comments made by the panel at the previous meeting, as well as further reflections from the executive and discussion with Nesta. The proposal is intended to add structure to the panel's work for the year, with a view to producing meaningful outputs that can be used by the executive and board in their development of the OfS's next strategy beyond 2020-2021. The panel was invited to comment on, amend, and approve the proposal.
8. The panel discussed the following points, which also relate to the remaining items:
  - Scenarios are helpful as tools to inform strategic planning; the challenge lies in how to make the exercise impactful. This type of foresight exercise typically works best with the right inputs, including data, and the right stakeholder engagement. The coronavirus outbreak has created significant dislocations in areas such as the employment prospects for education leavers. The growing pressures on more disadvantaged students who must 'earn to learn' and the impact of unequal access to digital resources was noted.
  - Some of the scenarios should look at different possibilities within the same domain, such as high, medium and low student number scenarios.
  - In responding to the scenarios, the OfS should look to address points of fragility in the system. At least some of the scenarios should be designed with this response in mind.
9. The panel agreed to the proposal subject to their comments and feedback. The proposal for the work of the panel was subsequently developed further and is being reviewed by the panel members (please see Annex A, informing the OfS strategy development, for more detail).

### Coronavirus (COVID-19) impact on higher education

10. The extent to which the coronavirus outbreak has transformed nearly all aspects of our society – higher education included – was noted. While some effects will be temporary, many could be long lasting or permanent. The panel received a paper posing a list of questions to consider, and a list of resources to inform the discussion.
11. The panel discussed the following additional points:
  - The pandemic has challenged the seemingly long-standing assumption that international fees can be relied upon as a growth area.
  - Social distancing may be required for an extended period of time.
  - Inequalities have been exacerbated within the education system and society more broadly. There is an immediate effect taking place now, and there will be a

long-run tail-effect if the inequalities earlier in the education system and in wider society are not mitigated.

- There are significant economic effects resulting from the pandemic, which will in turn have short-term impacts (such as pressures on the graduate recruitment market) and long-term impacts (such as changes in demand for education).
- The rapid shift to online learning may have several knock-on effects, including:
  - i. Changes in pedagogy, both positive and negative
  - ii. A possible higher dropout rate
  - iii. Potential downward pressure on fees
  - iv. Potential longer-term trends, such as movements towards the unbundling of higher education and greater competition from disruptive provision.
- There have been and will be differential effects across subjects and courses.
- Research has been affected, for example by limits on collaboration due to lockdowns and visa restrictions, which may lead to longer-term impacts on the supply of teaching and research staff.
- There is an opportunity across all ages and stages to reshape what education means in England.
- Coronavirus appears to have had a serious impact on student well-being and created an unprecedented need for mental health support. Looking forward to the new academic year, students are uncertain about what their experience will be in terms of placements. The social aspects of the student experience may be very different if social distancing must remain in place; effective reopening strategies will be critical.

12. Many of the points raised go beyond the remit of the OfS, and the panel agreed that the board and executive would need to carefully consider their role in relation to these issues.

#### Future of higher education

13. Further to the paper discussed on the Overview of 2020, the panel received a paper containing a list of articles, references and resources to inform the panel's contribution to the development of the next OfS strategy.

14. The following additional points were made in discussion, as possible options for the creation of scenarios:

- There was interest in Bert van der Zwaan's description of what global higher education might look like in 2040, particularly the concept of knowledge hubs with concentrations of institutions playing a leading global role, potentially with other institutions acting as hubs of further and higher education knowledge within regions.
- There was discussion about what blended learning might look like for different subjects. An Annex to the papers charted the shift in BA majors taken by

American undergraduates from 2011-2017, showing substantial reductions in some humanities and greater take up of STEM subjects - and subjects such as health, nursing and sport sciences, which were arguably more difficult than other subjects to deliver remotely. There was interest in equivalent shifts in subjects in the UK and speculation about whether the coronavirus outbreak would accelerate or divert trends in subject choices, raising additional further questions about subject choice and impacts on social mobility.

- Other challenges to the traditional degree format, including length, pedagogy, and models of credentialization.
- Changing attitudes towards the purpose of higher education from the public and central government might lead to structural shifts in the sector, such as a move towards a large vocational component and a smaller, more academically focused one, or a greater focus on shaping the economy via the labour supply.
- It was noted that for many of the issues raised (such as digital inequalities and subject choice shifts) the OfS cannot directly control these factors. Nonetheless, they provided useful reference points for testing a new OfS strategy.

#### Next steps

15. **Next steps** from this meeting involve:

- To sharpen the panel and board/executive feedback loop in the November panel meeting - for example, by inviting board/executive members to that meeting to discuss how they have responded to the panel's scenarios.
- To take the panel's points on the coronavirus paper and feed them both into the work on the OfS's future strategy and, where relevant, the sequencing of 'rebooting' regulatory requirements.
- For reflections that go beyond the remit of the OfS, to share these with the relevant bodies.
- A small group to filter the number of scenarios and choose a handful to share with the panel for approval and a list of questions to pose to the board in relation to the future OfS strategy.
- Before the next panel meeting, panel members and staff to develop the scenarios and a list of questions to pose to the board on the forthcoming OfS strategy.

#### Future meetings

16. The next meeting will take place on 15 September 2020.

#### **Paper publication date**

17. This paper will be published as soon as possible after the board meeting, with appropriate redaction of work informing strategy development (Annex A).