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WHAT TO EXPECT FROM THE FUTURE OF HIGHER EDUCATION

A series of regional reports offer expert insight into the challenges and opportunities for global universities during a time of fundamental change

The new era of higher education will face challenges including the digital transformation of learning and teaching models and preparing graduates for the workplace of the future. This report examines how universities around the world are responding to the tertiary education sector's most pressing challenges and offers some guidance on how they can thrive in the future.

The report draws insights from a series of regional round-table discussions, held by *Times Higher Education* in partnership with PwC. Regional reports from Africa, Australia and Singapore, the Middle East and the UK provide an overview of the issues higher education faces and strategies to overcome them.

The round tables brought together senior leaders in higher education, including vice-chancellors and education and industry experts from PwC. The regional reports are also informed by PwC surveys, completed by senior higher education and business leaders.

Graduate employability is a concern among higher education leaders in the Middle East. To build skills capacity in the region, redesigned courses that teach the skills employers need in the digital world are seen as essential.

In the UK, the "perfect storm" of Covid-19 has shone a light on issues like student experience and digital learning. The UK is exploring how universities can respond to these challenges by working with industry and the local community under a civic engagement agenda.

With the Covid-19 pandemic accelerating change in the global higher education landscape, this report investigates how universities can effectively face new challenges and embrace opportunities to thrive.

"Covid-19 has shone a light on issues like student experience and digital learning"



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RETHINKING COURSE AND CAMPUS DESIGN TO PREPARE MIDDLE EASTERN UNIVERSITIES FOR THE FUTURE



Modernising course design to diversify student learning can improve the employability prospects of graduates in the Middle East and inject much-needed skills capability into the region. At a *Times Higher Education* round table, held in partnership with PwC, academics and industry leaders agreed that redesigned curricula and enhanced engagement with industry would help prepare graduates for the rapidly changing workforce.

Sally Jeffery, who leads PwC's global education and skills network and PwC's education practice in the Middle East, says the region now has a real appetite for modernising course design to give students a multidisciplinary understanding and improve employability. However, Jeffery says, the region continues to suffer from a lack of flexibility in regulation around programme design and acceptance of blended learning.

"The post-graduation employability stats here are a real concern for the ambitious leaders of this region. In some cases, they're lingering around 30 to 35 per cent six months post-graduation, which is very, very low compared with top ranked institutions. Not all institutions are like that, of course, but unfortunately a lot of the public ones are," Jeffery says. "Modernising course design

to open up access, improve the diversity of learning of the students and improve their employability skills is the most urgent driver of reform."

A PwC survey asked senior higher education leaders in the Middle East about their experience of the transition to more blended learning models. Nearly 90 per cent of respondents reported that their institution was doing well or very well in adapting curricula and delivery models to maximise student success.

ADDRESSING THE STUDENT SKILLS GAP

Despite significant funding and resources in the region, businesses seeking growth at a time of technological transformation are struggling to find graduates with the skills they need. "We work with many clients that are on this journey and none of them are comfortable that the current education and training sector can help them plug those skills gaps fast enough," Jeffery



Institutions have demonstrated their adaptability through the pandemic, and now have an opportunity to continue to collaborate, but they must reform regulation and reassess their focus to achieve meaningful change

says. "They're still hiring a lot overseas and they're still keen to get into the business of education themselves because they view this as easier than trying to work with some of the local universities." Though this is a sentiment expressed by clients worldwide, the pace of ambitious reform and the maturity of the education sector in the Middle East means that many view this gap as being insurmountable for the foreseeable future.

PwC is in the business of education itself, with 44 PwC Academies around the world, the largest of which is in the Middle East. They provide both in-person and digital learning solutions. The academies are helping to plug some of the skills gaps in the region, offering courses in disciplines such as cybersecurity, digital awareness and leadership skills, as well as traditional professional certification courses they have offered for years. "We're helping drive change because we're mostly offering shorter courses and are less constrained than the universities are, and also because we've got

the global reach and real-world experience to help us develop relevant content," Jeffery says. "But we always reach out to the local higher education system and faculty and try to get them involved in providing more formal qualifications and microcredentials. This is partly because microcredentials are a great learning motivator, partly because faculty best understand the discipline, latest research and pedagogy, but also because they're not going to understand what's needed unless they start to participate in it."

Upskilling is not limited to graduates, with the round-table panellists stressing the need to give faculty training to be better able to manage new delivery models. Panellists also identified the need for regulators to embrace more flexibility in the definition of faculty roles.

The PwC survey found that only 44 per cent of respondents thought their institution was doing a good job of strengthening partnerships with industry to become more internationally competitive.

TRANSFORMING PEOPLE AND THE ECONOMY

The region's governments need to play a role in supporting the higher education sector as it undergoes a profound transition.

"Refocusing on the needs of the local population presents an opportunity"

plan to move on for the sake of their future careers or stop trying."

As the region moves into a new era for higher education, refocusing on the needs of the local population presents an opportunity for institutions to innovate. "I wish universities in the region would set aside the idea of trying to be high up in the global rankings by emulating those that are already there, and instead focus on what's right for their learners and what's right for the economy in their country," Jeffery says. "They don't have the legacy and the constraints of a 200-year-old, branded institution. They can start afresh, they can try some new things, be truly innovative, more agile, more inclusive, more accessible. The youth in this region are very tech savvy and the employers are desperate to hire them. They should have the confidence to look at completely new campus models."

An important advantage for the region is governments' strong desire to invest in education. Saudi Arabia's Human Capability Development Programme, for example, includes 89 initiatives, the majority of which relate to education and training. The Saudi government is investing SAR15 billion (£3.1 billion) in the programme. "That's just one country. It's going to be hard work, but I think in the next two to three years we'll see massive change," Jeffery says. "The opportunity to be quite innovative in higher education exists in the Gulf Cooperation Council countries, where the funds are being made available and the government truly believes in the power of education to transform their people and transform their economy. Faculty and leadership skills in the Middle East need to be developed, but that's the case worldwide, and my view is that you ought to be able to count on smart faculty to learn what's needed – that's their business after all. Governments need to continue supporting this change through funding, trusting those who are running these institutions, and highlighting through data when that trust is misplaced."

HOW UNIVERSITY LEADERSHIP IN THE UK IS ADAPTING FOR THE FUTURE

University leaders were battling with complex forces before the pandemic, but the past 18 months have thrown these issues into sharp relief. Caitroina McCusker, education lead for PwC UK, describes Covid-19 as the "perfect storm" that has pushed debates around digital learning, equity of access to technology and student experience to the top of the agenda.

At a round table discussion, held by *Times Higher Education* in partnership with PwC, senior leaders from the UK higher education section debated how university leaders must adapt to address these evolving challenges. The round table also looked at where there could be unique opportunities for higher education institutions to drive change and work more closely together in future.

One key area will be in helping students catch up on missed learning and supporting them to recalibrate their mental health. An Ofcom survey carried out in 2020 found that almost one in 10 households with children did not have access to a laptop, desktop computer or tablet, meaning thousands of prospective university students will have been at a digital disadvantage during pandemic school closures. A July 2020 survey commissioned by NHS Digital found that the prevalence of clinically

significant mental health conditions among children was 50 per cent higher than in 2017. "The question," McCusker says, "is how can leaders deal with all this that is coming through and enable students to have successful outcomes, be responsible educators, and also serve students as their customers who are investing a lot of money in their education?"

BUILD BACK BETTER

Universities' role in the "build back better" agenda post-pandemic will be wide-ranging and important, according to delegates at the round table. "Our role going forward will

be reskilling people after the pandemic and helping people into new sectors," Ian Greer, vice-chancellor of Queen's University Belfast, told the panel. Supporting students whose learning was impacted by the pandemic will demonstrate the civic contribution of universities, added Robin Mason, pro vice-chancellor (international) at the University of Birmingham. "As universities, we need to adapt our learning and teaching so [students] can pick up on the time that has been lost. This is a tangible way to demonstrate our value," Mason said.

Both student and staff well-being must feature highly in this agenda. A survey of

CEOs by PwC recently found that 61 per cent were worried about the declining well-being of their staff, and this concern is no different in higher education. In building a hybrid working and learning environment, higher education leaders need to grasp the opportunity to offer inclusive and useful experiences, McCusker believes. "We may now see university estates get smaller, but the focus will be on the experiential side through digital investment. We may not see people back in offices five days a week, and the needs of the workforce will be driven by the needs of our citizens and students," she says. "There are lots of moving parts



"Leaders need to grasp the opportunity to offer inclusive and useful experiences"

Universities' post-pandemic role in communities will be one of complexity and collaboration. Leaders are adapting their approaches to meet the challenges ahead

here, and this requires more ambitious and forward-thinking leadership alongside a willingness to make decisions when nothing's set in stone."

One way to do this is by addressing universities' technology debt in a way that also widens access to digital learning for students and the community, argues McCusker. "Lots of universities have been working with technology that was not necessarily fit for purpose when we were thrust into a 24/7, 365-days-a-year digital environment," she explains. "Before the pandemic, you would go to the class on your timetable and information would be projected at you. Now we have the chance to provide learning in a way students want to consume it, to allow them to press play or pause, to read around the learning at their own pace." The pandemic has also offered institutions pause to reflect on how they build out their digital infrastructures, she adds. "Leaders are thinking about how they do this responsibly rather than just shifting learning to the cloud. Sustainability, the environment and responsible growth are all part of these competing debates at leadership level."

DRIVING PARTNERSHIPS

Universities' ongoing civic mission will not just be to support new and existing students as they catch up and prepare for a volatile labour market, but also to help their communities recover. Partnerships with local stakeholders such as NHS trusts and local authorities expand universities' footprint and can be part of the wider levelling-up agenda, McCusker believes. "Civic engagement is about so much more than place. It's about the ambition of leaders and what institutions can do, how we use this time to help people affected by the pandemic to reskill and bring people into universities and into new employment," she says. "This way our value is not just to students but their wider

families."

Kiran Trehan, pro vice-chancellor for partnerships and engagement at the University of York, raised this point at the round table. "We don't always highlight all the good work we do, for example in social mobility, and the way many institutions stepped up to help the NHS," she said. "Novel approaches to learning are not just about systems and processes but about creating living labs."

Creating partnerships across universities and beyond will help these new approaches succeed. While institutions have long collaborated on academic research, there are huge potential gains from working together in other areas, too. The University of Exeter, for example, has close ties with its local further education college and multi-academy trusts to offer skills escalators, where students can follow inclusive pathways in areas such as digital and data analytics. Tim Quine, deputy vice-chancellor for education at the university, told the panel that this creates the idea of an "educational ecosystem in a geographical location" that fits well with the government's levelling up agenda. He added: "It's about how we co-create solutions, so if you want to upskill, university might not be the right place, but college could be."

There is more of this to come, according to McCusker. "Universities are looking to become more cohesive and collaborative so they must now showcase their role in the community and how they develop those partner ecosystems," she says. "Universities must approach this not as silos of roles and responsibilities but develop talent inclusively. [They must consider] how diverse the workforce is, how they drive a culture that gives a competitive edge but also is a place people want to be a part of."

TRANSFORM UNIVERSITY LEADERSHIP IN AFRICA BY SUPPORTING FACULTY AND INNOVATION

Some 60 percent of Africa's population is under the age of 25, yet not all young people enjoy the same higher education opportunities. The pandemic has shone a light on the digital and educational divide, and the need for universities to work with other stakeholders in society to address this.

At a round table discussion, held in partnership between *Times Higher Education* and PwC, panellists discussed the many challenges African universities face in terms of bringing faculty on board with digital transformation, issues around connectivity and how to prepare students for the new world of work.

Dion Shango, CEO of PwC Africa, told the round table that the assurance and consulting company has made a number of the UN's Strategic Development Goals core to its mission, one of which is education. Educational institutions are both clients and crucial future sources of talent, meaning

CREATING CONNECTION

Although most institutions in Africa were able to put mechanisms in place for students to access learning during the pandemic, many faced issues with web connectivity. "Our surveys have shown that while access has been provided to students, their experiences said: "To manage the digital transformation, you must listen to faculty members and understand their challenges and limitations. It was important for us all to take a pause and connect with training requirements for our faculty, as well as look at our learning

Round-table delegates described how they had responded to differing levels of faculty readiness for remote and blended learning. Some campuses offered centralised facilities where staff could deliver courses or hone their digital skills; the University of Cape Town's Centre for Higher Education Development promotes equity of access and enhances curricula, for example. The

University of Cape Coast, meanwhile, discovered there were some issues around confidence and upskilling staff. "We had a Centre for Teacher Support and Distance Learning long before Covid, but most of my colleagues had not utilised it to its fullest – there was a lot of inertia," said Frederick Armah, director of the Directorate of Research, Innovation and Consultancy at the university. "So, we carried out a needs assessment that looked at the infrastructure, the systems and the gaps." The initial assessment took a month, but the university continues to reflect on how staff are coping and evolves its support accordingly.

have been very different," said Roshan Ramdhany, education industry leader at PwC Africa. The universities that adopt creative, blended approaches seem to fare best, according to Shango: "Universities must challenge themselves to provide any and all opportunities for students to learn and engage as effectively as possible, and that might mean taking something and studying it offline rather than clogging essential bandwidth," he added.

University leaders are proactively using data and feedback to evolve their approaches to digital learning and hybrid working arrangements. Bill Puplampu, vice-chancellor of Central University in Ghana, said: "To manage the digital transformation, you must listen to faculty members and understand their challenges and limitations. It was important for us all to take a pause and connect with training requirements for our faculty, as well as look at our learning

management system to make it more adaptable."

Dhanjay Jhurry, vice-chancellor of the University of Mauritius, described this as an "evolutionary process". "At leadership level we need to get staff in both academia and professional services to understand that digital transformation is about people as well as processes and tools," he said. Ramdhany agreed: "Digital learning is all about people rather than a piece of software or physical technology. We need to put people at the centre of the discussion on digital learning." He referred to how leaders at the University of Pretoria gathered data on students' circumstances during the pandemic to maximise their chances of passing their first year, rather than risking a high drop-out level.

A key lesson for universities over the past 18 months is that they can no longer view themselves as “islands of excellence”,

as Mamokgethi Phakeng, vice-chancellor at the University of Cape Town, pointed out. Working with external stakeholders including employers, governments and the community will be crucial in the post-pandemic future. "Some of the challenges ahead are not only linked to universities," Ramdhany said. "Universities realise that they can't do this alone and need to collaborate with the private sector and beyond." Shango added: "Everyone has a role to play, and all actors have to bring the same level of commitment. Businesses can provide the urgency that governments cannot provide, and we have a duty to exert pressure, particularly in Africa where we have such a young population."

THE POWER OF PARTNERSHIPS

Collaboration will also be an important aspect of how universities upskill staff and prepare students for the workplaces of the future. For

“We have a responsibility to contribute to digitally upskilling societies”



example, PwC has its own programme, "New world. New skills", which brings educators, business leaders and the public sector together to address the digital skills gaps that have been highlighted by the pandemic. "We realised that we had a responsibility to contribute to digitally upskilling the societies in which we do business, so we can take everyone along this journey," Shango said.

The University of Cape Town also takes its relationship with external stakeholders seriously, having set up its online high school to give learners across South Africa the opportunity to develop their potential before entering university or the workplace. "We are open to collaboration – both locally and internationally," Phakeng said. "Disruption is all about problem-solving and making education more accessible to more people."

Africa offers a "maze of policy contradictions", according to Stanley Bhebhe, vice-chancellor of the Africa Nazarene University in Kenya. And for this reason, higher education establishments must come together to move past the scepticism levelled against digital learning approaches, as well as foster strong partnerships with government and the private sector. "We must prioritise collaboration between governments, universities and industry to maintain the gains we've acquired over the last year," he concluded. "Education is a common good."

If there's one benefit to come from the pandemic, I hope it's that this message has been reinforced."

AN OPPORTUNITY FOR DECISIVENESS AT UNIVERSITIES IN AUSTRALIA AND SINGAPORE



“University leaders must be supported to make bold and disruptive decisions”

Universities in Australia and Singapore have an opportunity to create new teaching models, lead on lifelong learning and engage effectively with government and industry. But, at a time of transformational change in the higher education sector, university leaders must be supported to make bold and disruptive decisions.

At a *Times Higher Education* round table, held in partnership with PwC, higher education leaders from Australia and Singapore discussed how analytics, artificial intelligence and other digital technologies were changing education delivery. As well as harnessing technology to create student-centric teaching and learning models, participants said there was potential to explore new paradigms of education.

Tristan Hockley, government and public sector leader for PwC South-east Asia Consulting, says figuring out the future role of tech is a key trend in the region. “The role it can play in teaching is a really exciting area where a lot will happen,” Hockley says. “In all industries, the way we work is changing fundamentally. There is potential with technologies like AI and machine learning to make the whole learning experience more personalised and hopefully more engaging in this digital world.”

The impact of the Covid-19 pandemic has put pressure on university budgets. PwC’s reimaging the higher education sector report found that Australian institutions could lose AUD 4 billion (£2.12 billion) in revenue from international students. “Particularly in Australia, revenue decline is a real issue. What does that mean for a

Institutions that are willing to challenge traditional thinking have the chance to thrive in higher education’s new era

university system that has relied so heavily on international students as an important funding mechanism for the rest of their investments?” Chris Matthews, higher education lead for Australia, asks. “There are a lot of universities in Australia, and many are making a conscious choice to reassess their size and focus areas and seek to differentiate in the market. I think the top ones with the financial and reputational clout in the market may benefit in the long term, but there’s no doubt there are some institutions struggling.”

OPPORTUNITIES TO EVOLVE

Despite the challenging environment, there are opportunities for universities that are nimble and willing to adapt quickly. For example, some universities in Singapore have taken steps to recruit international students from China who were unable to travel to Australia to study. For smaller universities, Hockley says there is a “huge opportunity” to become known for their course content in the new reality of blended learning. He says all institutions in the region should be actively investigating ways to continue to upskill faculty and grow their lifelong learning offering.

“The university model has to evolve, and it is. The days of studying for a degree and being good to go for 30 or 40 years in the

workforce are coming to an end,” Hockley says. “The opportunity for universities is to be part of lifelong learning and not leave it for someone else to do. I think it is part of their responsibility.”

The impact of the pandemic has also put the research agenda back in the spotlight, with universities examining how to increase commercialisation. The Australian government’s 2021-22 budget has reduced university funding by nearly 10 per cent over the next three years.

At the *THE* round table, panellists pointed out that part of a university’s role should be making “high-risk intellectual bets” in an effort to advance the wider society. “The purpose of university research is bigger than commercialisation,” Hockley says. “Governments have to be bold, and I think it would be very short-sighted to not adequately fund research when we’ve seen

the power of research to help us through this pandemic. I think in Singapore the government will continue to commit lots of funding to research. But the Australian government has to show that they’re ready to do that.”

An increase in innovation precincts or “clusters” has been suggested as one tool universities can use to engage with industry and government more closely. The panellists said that such projects must have a clear design and strategy agreed by all parties as well as a specific purpose, proximity to an innovation ecosystem and effective governance on the decades-long journey.

“It’s a whole ecosystem that delivers a successful higher education sector,” Hockley says. “And government’s role has to be as this enabler to bring everyone together for the common good and the common purpose. The sector has to have clear policy, direction,

support and funding. But there has to be a way for industry and the general public to participate in this as well. Precincts are a classic example of that because they force all those people together. Industry and government benefit because they get skilled people and universities attract more investment because they’re producing greater outcomes. If one of those partners doesn’t pull their weight you don’t get that ecosystem and net benefit. I think Singapore and Australia already do that pretty well.”

TIME FOR DISRUPTION

Universities will also have to be disruptive in their decision-making as the sector enters a new era. “You have to be bold and innovative because the reality is different now. We’re not going to go back to that model we had pre-pandemic,” Hockley says. “You have to engage more in this ecosystem.” Successful partnerships bring together the university and industry at a deeper level, anchored by shared value with a long-term perspective.

At a time of such rapid change, university leadership will need support and insight from other industries undergoing transformation. “We see this disruption across all industries. If you think about university leadership, it’s often experienced faculty who take on those roles and they’re very good at knowing what works in higher education and how it’s always worked,” Hockley says. “Where PwC adds a lot of value to our clients is being able to say, ‘all industries are being disrupted and this is what they are doing’. That external view and that ability to bring in those lessons [is important]. It’s about challenging university leadership to think through this differently. No one’s been through this before, so it does present unique opportunities.” Matthews adds: “We are seeing universities seek to build a digital spine to improve the efficiency and effectiveness of their operations as well as improve the experience across multiple channels for their students.”

While disruption is inevitable, universities in Australia and Singapore must not lose sight of their primary role. “Purpose is important and so is the role of universities in society in terms of shaping the human capital, filling the skills needs of the country, the knowledge requirements and scientific innovation. That’s really important,” Hockley says. “We’re in a pandemic. Funding is tight and we need to get new models. But we can’t forget the purpose.”

THE CHALLENGES FACING GLOBAL UNIVERSITIES IN THE NEW ERA OF HIGHER EDUCATION

International insights reveal how different markets are responding to the massive transition in tertiary learning and the strategies universities need to survive and thrive

Universities around the world must drive transformation through technology and adapt to meet the changing demands of students and

the future workforce. A series of round-table discussions, held by *Times Higher Education* in partnership with PwC, considered some of the sector's most pressing challenges, while regional reports focused on Africa, Australia and Singapore, the Middle East and the UK further interrogated the higher education landscape.

Sally Jeffery, who leads PwC's global education and skills network and is PwC's Middle East education and skills practice Leader says one of the aims of the series was to examine leadership capabilities in higher education. At the Africa round table, for example, panellists discussed how digital transformation was impacting students and the support staff required to deliver new modes of delivery. "There were discussions about supporting each other more and recognising they're more powerful in teaching teams rather than as individual faculty," Jeffery says. "That to me was quite an honest finding, recognising the longer-term benefits

of having to support each other more during a period of crisis."

PRIORITISING WELL-BEING

With the profound impact of the Covid-19 pandemic still fresh in the memory, student well-being was a key concern across regions. "We found that all faculty initially found it quite hard to talk about themselves and their own capabilities and what they need," Jeffery says. "Student well-being was a massive theme. Whereas previously the UK was the only network firm doing significant work in

"University leaders can look to the private sector for inspiration"

this space, we found that it was now front and centre at all round tables."

With blended learning the new reality, the speed of transition varies across sectors. "There's a lot of change happening, not just to delivery models but also to curriculum design and it's a worldwide trend," Jeffery says. "I think the UK system is one of the pioneers in moving to more innovative models, for example with its two-year undergraduate programmes and the degree apprenticeships. Education technologies are opening up exciting possibilities, with more agility in programming and scheduling, and therefore improved accessibility for a more diverse student body.

"The US has some great blended learning models and Australia is opening up with a more flexible academic calendar. The US and North America and Australia are geographies that are very commercially driven. Australian universities have seen a massive dent in their revenue through the drop in international students. There's a real economic urgency around them sorting that out. Those geographies are moving really fast."

CHANGE MINDSET

While other areas are taking longer to adapt, there is an awareness of the need to change and the role government can play in assisting the transition. In the Middle East, for example, graduate skills capability is a concern and governments are investing heavily in training and believe in the power of education to transform societies.

Higher education is far from the only industry undergoing technology-driven disruption and university leaders can look to the private sector for inspiration. "We've been looking at how PwC can play a role in providing more guidance to university leadership around leading an institution in this age of uncertainty," Jeffery says. "We're seeing a lot of transformation in other organisations that are really breaking those silos so they can be much more agile and work in a much more interdisciplinary way.

"That is a matter of survival in some of the companies we work with. Some of the large manufacturing companies, for instance. So, I think there's a lot more we can do to help universities break away from the very traditional organisational structures that they have and understand what it means to embrace some of those new models."



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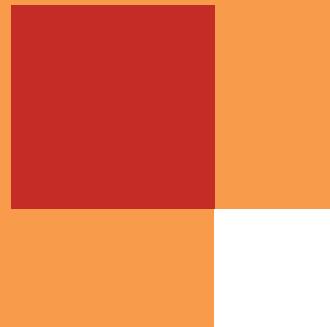
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