

# The future (r)evolution of HE?

*28<sup>th</sup> Nov 2012*

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@LouisMMCoiffait

The Pearson Think Tank

*thepearsonthinktank.com*

# The future of HE



### 1. WHO?

More students, from and in emerging nations  
More older, working and part time students

### 2. WHERE?

Informally, outside classes, wherever suits  
More courses with multiple global locations

### 3. HOW?

Blended, online and personalised services  
Socially with others, virtually or in person

### 4. WHY?

Economic benefit, for them and their country  
But increasingly for a better world - **values**

# Quick introductions

1

# Pearson

PEARSON



FT

## Education

Our two divisions – Pearson International and Pearson North America – create curriculum materials, multimedia learning tools and assessment programmes that help to educate more than 100 million people in over 70 countries worldwide – more than any other private enterprise.

## Consumer publishing

Our world-famous Penguin brand is a label of quality around the world, publishing an unrivalled range of fiction and non-fiction bestsellers and classics in over 100 countries.

## Business information

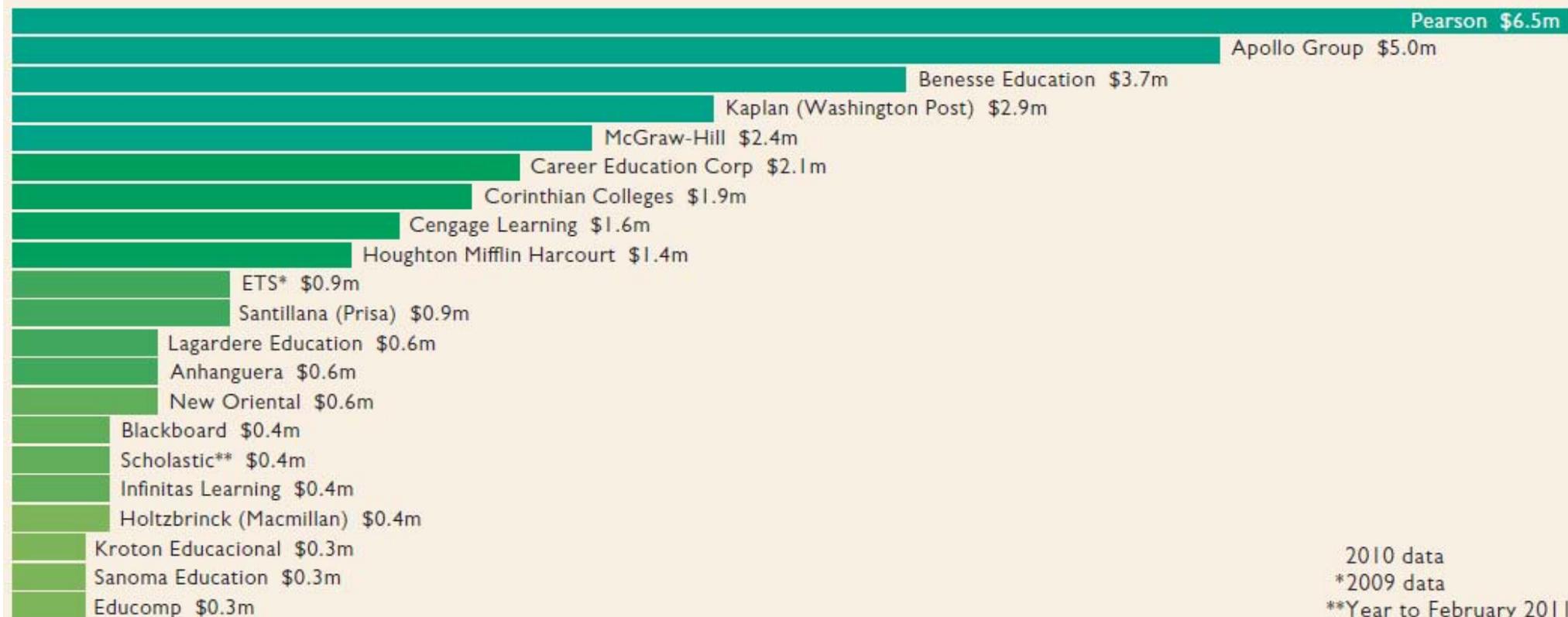
Our Financial Times Group, one of the world's leading business information companies, provides a broad range of digital services to the international business community.

More than 45k staff in over 70 countries helping over 100m learners

# The world's leading learning company?

## THE WORLD'S LEADING EDUCATION COMPANIES

### EDUCATION REVENUES \$m



2010 data

\*2009 data

\*\*Year to February 2011

# Change at the top

Dame Marjorie Scardino



John Fallon



# The Pearson Think Tank

Independent education think tank focused on research into education access and quality

The screenshot shows the Pearson Think Tank website. The top navigation bar includes the Pearson logo and the word "ALWAYS". Below this is the site title "The Pearson Think Tank" and a search bar. A secondary navigation bar contains links for Home, About Us, Research, Publications, Policy Watch, Events, Blogs, Contact Us, and Sign Up. The "Research" link is highlighted. A list of research topics is displayed, including "Careers 2020", "A New Conversation with Parents", "Blue Skies (live)", "Careers 2020 (live)", "Enterprise and Entrepreneurship education (live)", "Fair access to HE (live)", "Future Universities", "Rational Numbers: Maths to 18? (live)", "Subject to Change", "Teacher workforce – quality and quantity (live)", "The Academies Commission (live)", "The potential of open education data", "Tweeting for Teachers", and "Technicians and Progression". A large image of a person looking at a computer screen is visible on the right side of the page.

PEARSON ALWAYS

## The Pearson Think Tank

*Our focus is on the provision of, and access to, high quality education for all.*

Type here

Home About Us **Research** Publications Policy Watch Events Blogs Contact Us Sign Up

**Careers 2020**  
**Options for careers work**  
**English sch**

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**Blue Skies (live)**

**Careers 2020 (live)**

**Enterprise and Entrepreneurship education (live)**

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**The Academies Commission (live)**

**The potential of open education data**

**Tweeting for Teachers**

**Technicians and Progression**

thepearsonthinktank.com/research/

Twitter

# A shifting global context

2

# Recent sustained growth in HE learners

In 36 countries covered by OECD data there are more than twice as many 25-34 year olds (81m) with degrees than 55-64 year olds (39m)

Number of 55-64 year-olds



Number of 25-34 year-olds

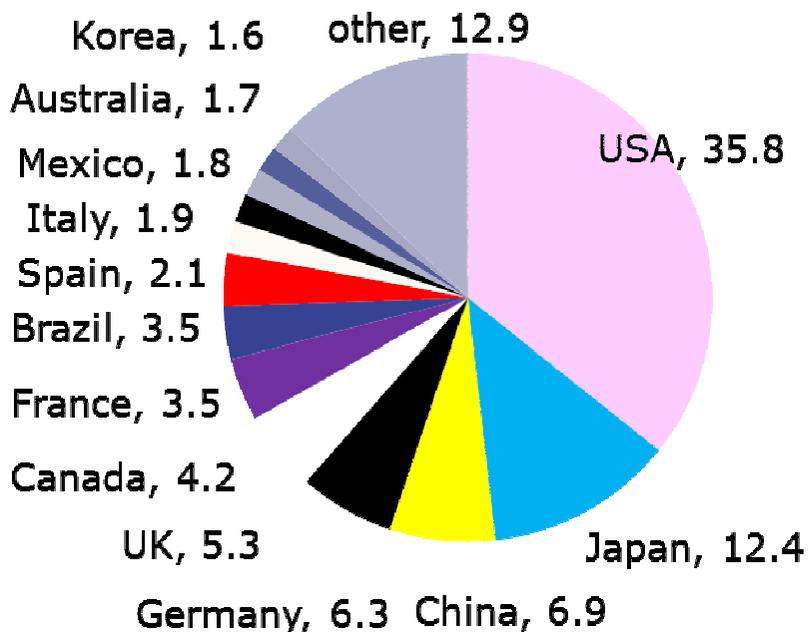


Sources: Andreas Shleicher (2012) What does the future hold for higher education?, OECD <http://goo.gl/sEpa1> based on data from Education at a glance (2012) OECD, <http://goo.gl/u9LbT>

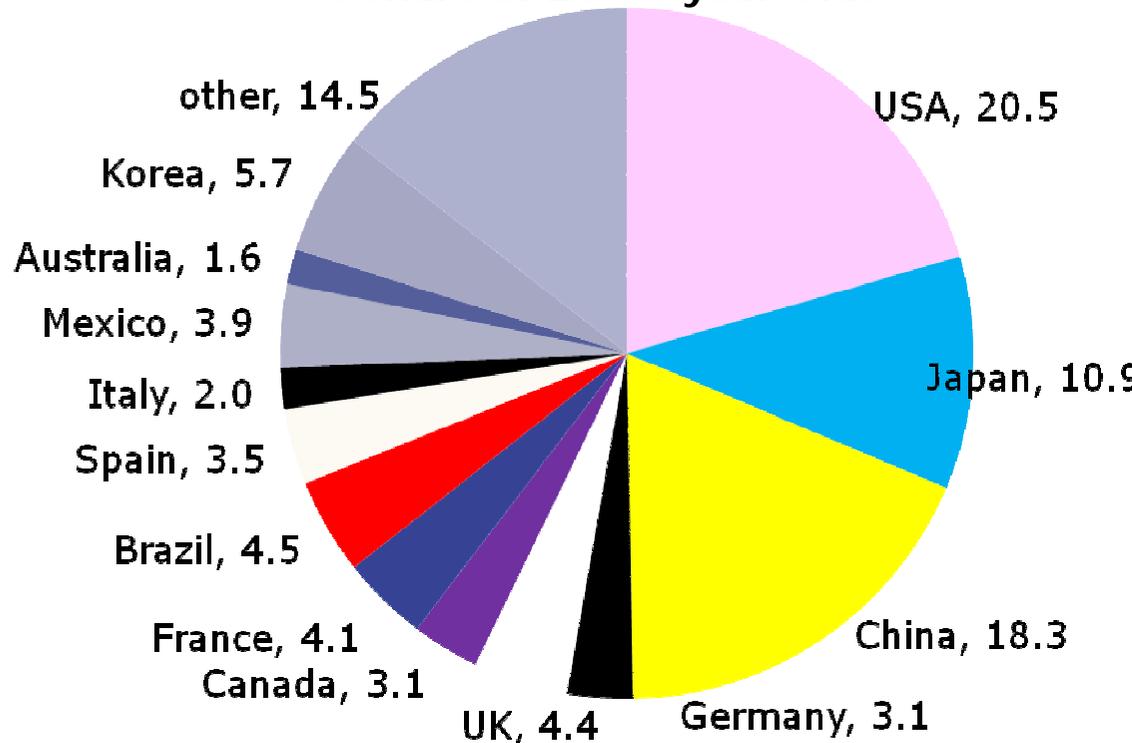
# Increasingly studying in, not just coming from emerging nations

The % share of graduates by nationality is shifting from West to East

% share of 55-64 year-olds

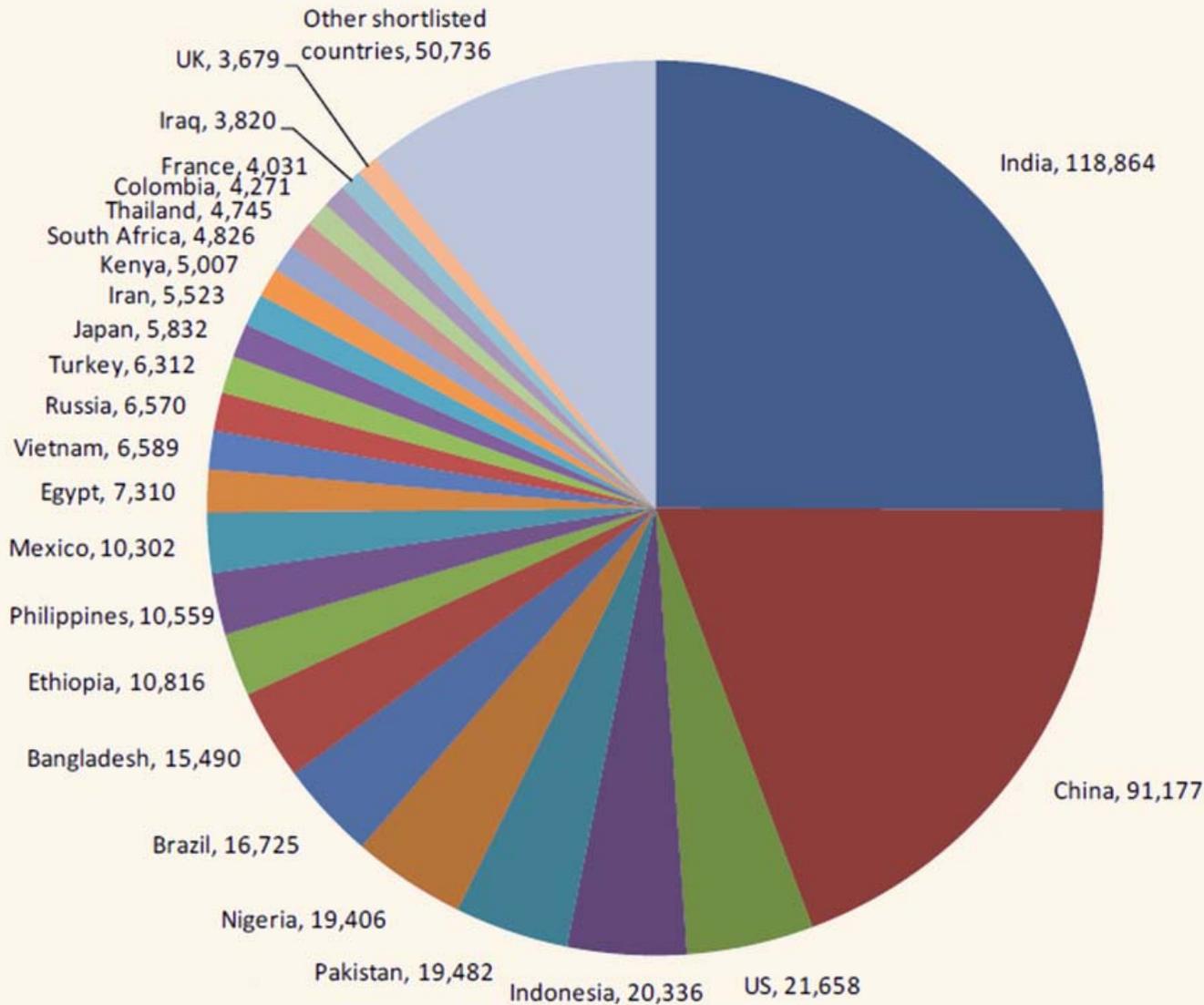


% share of 25-34 year-olds



Sources: Andreas Shleicher (2012) What does the future hold for higher education?, OECD <http://goo.gl/sEpa1> based on data from Education at a glance (2012) OECD, <http://goo.gl/u9LbT>

# Future 18-22 year-old population by 2020

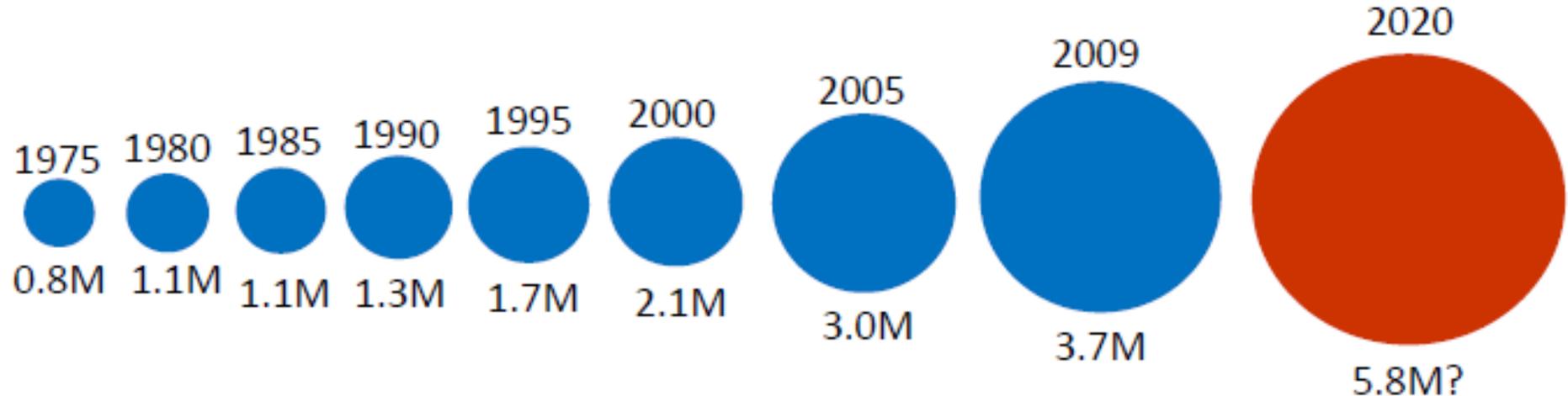


Source:  
UN Population Division,  
Oxford Economics (2011)

# Growth in internationally mobile learners

This growing pie represents a huge opportunity

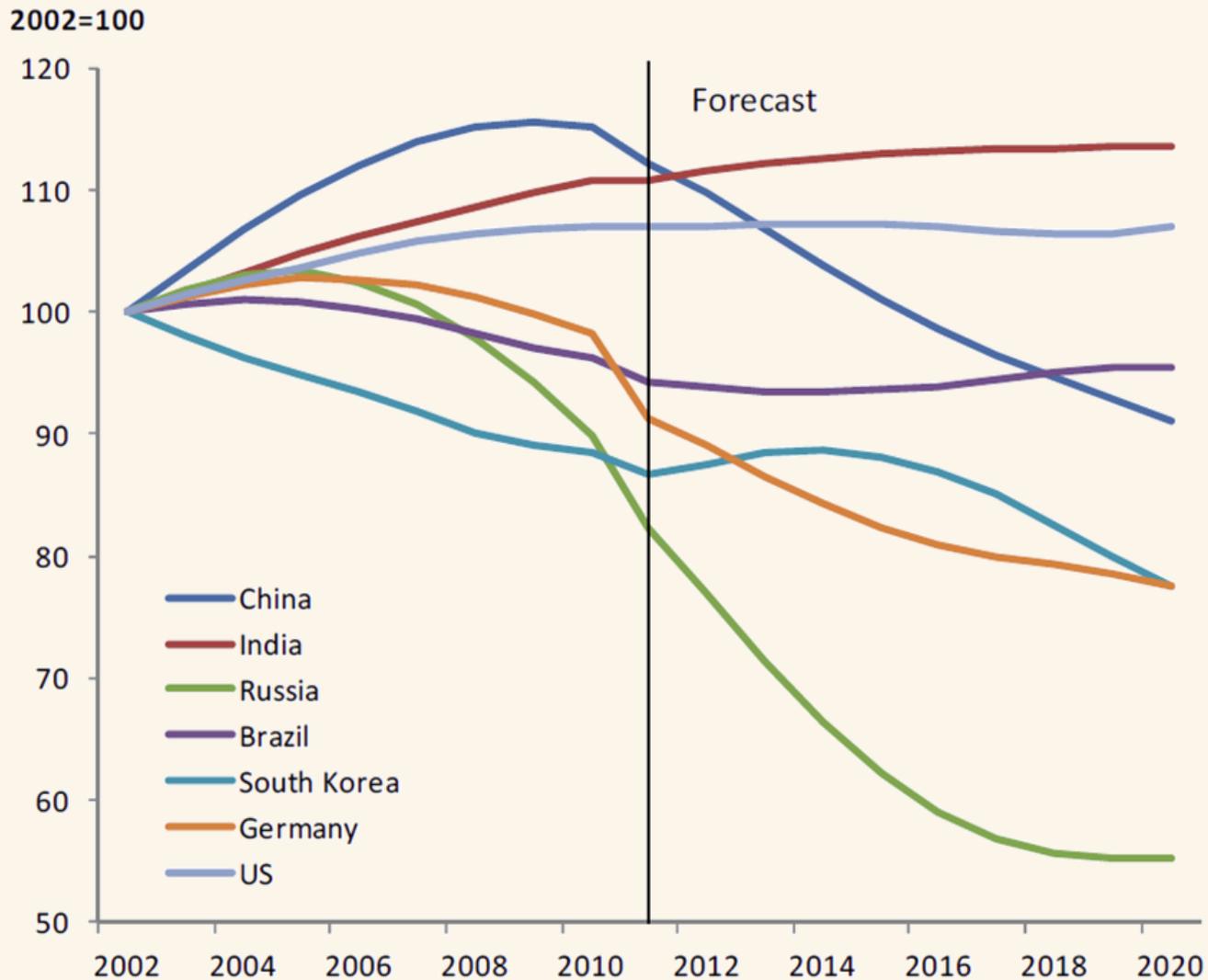
- to help educate the 'next billion'
- to build institutional capacity
- to develop 'world class' institutions



But it's not the answer to all HE's prayers...

Sources: Altbach et al (2009) Trends in Global Higher Education: Tracking an Academic Revolution, UNESCO <http://goo.gl/Khw2s>;  
Opening Doors – International mobility (2012) Institute of International Education (IIE) <http://goo.gl/ohi19>; The  
shape of things to come (2012) British Council <http://goo.gl/ibeJq>, Education at a glance (2012) OECD, <http://goo.gl/u9LbT>

# Future 18-22 year-old population over time



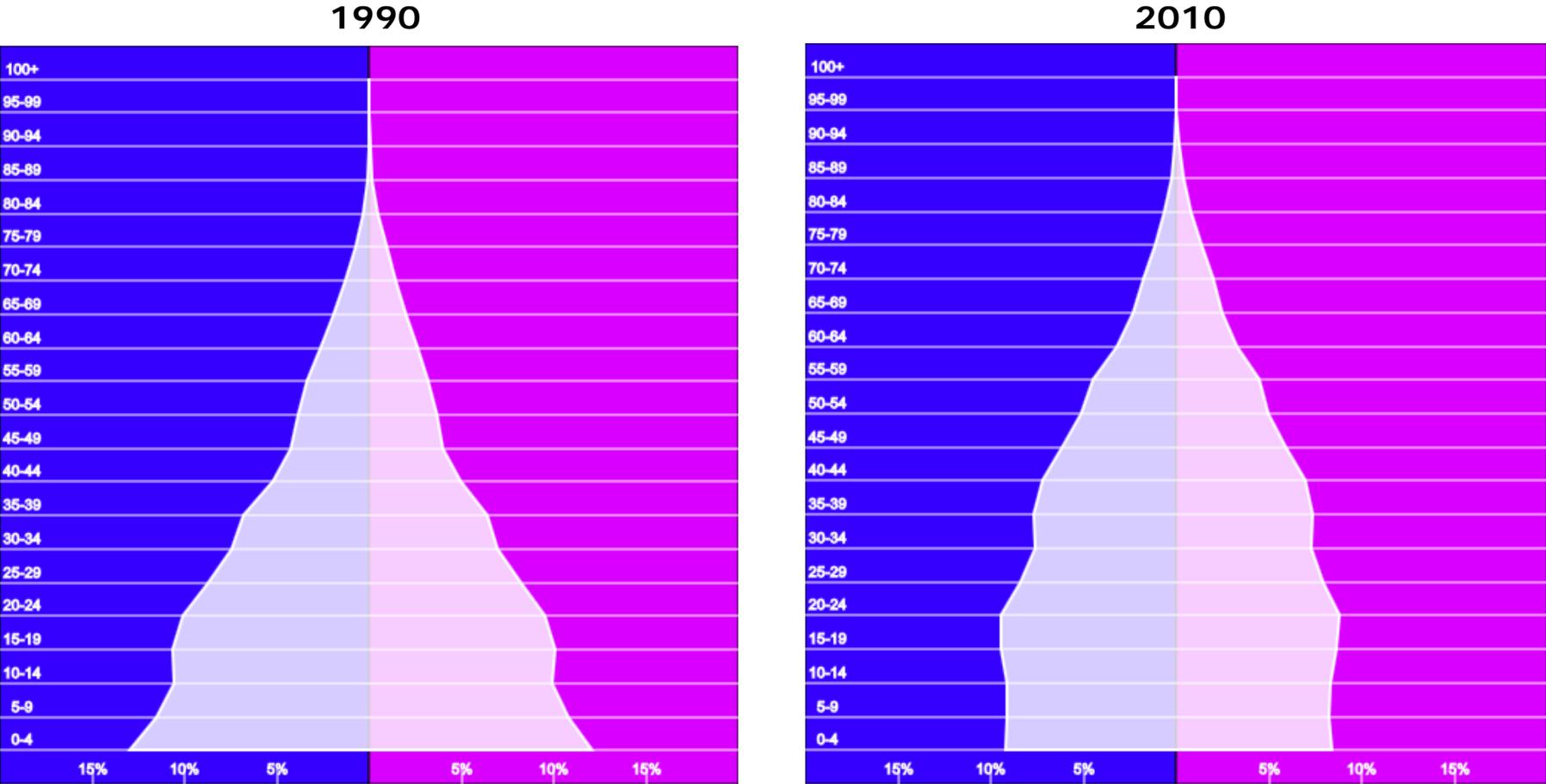
Huge falls for China, South Korea, Russia and Germany

Steady levels for the USA and Brazil

Steady growth for India

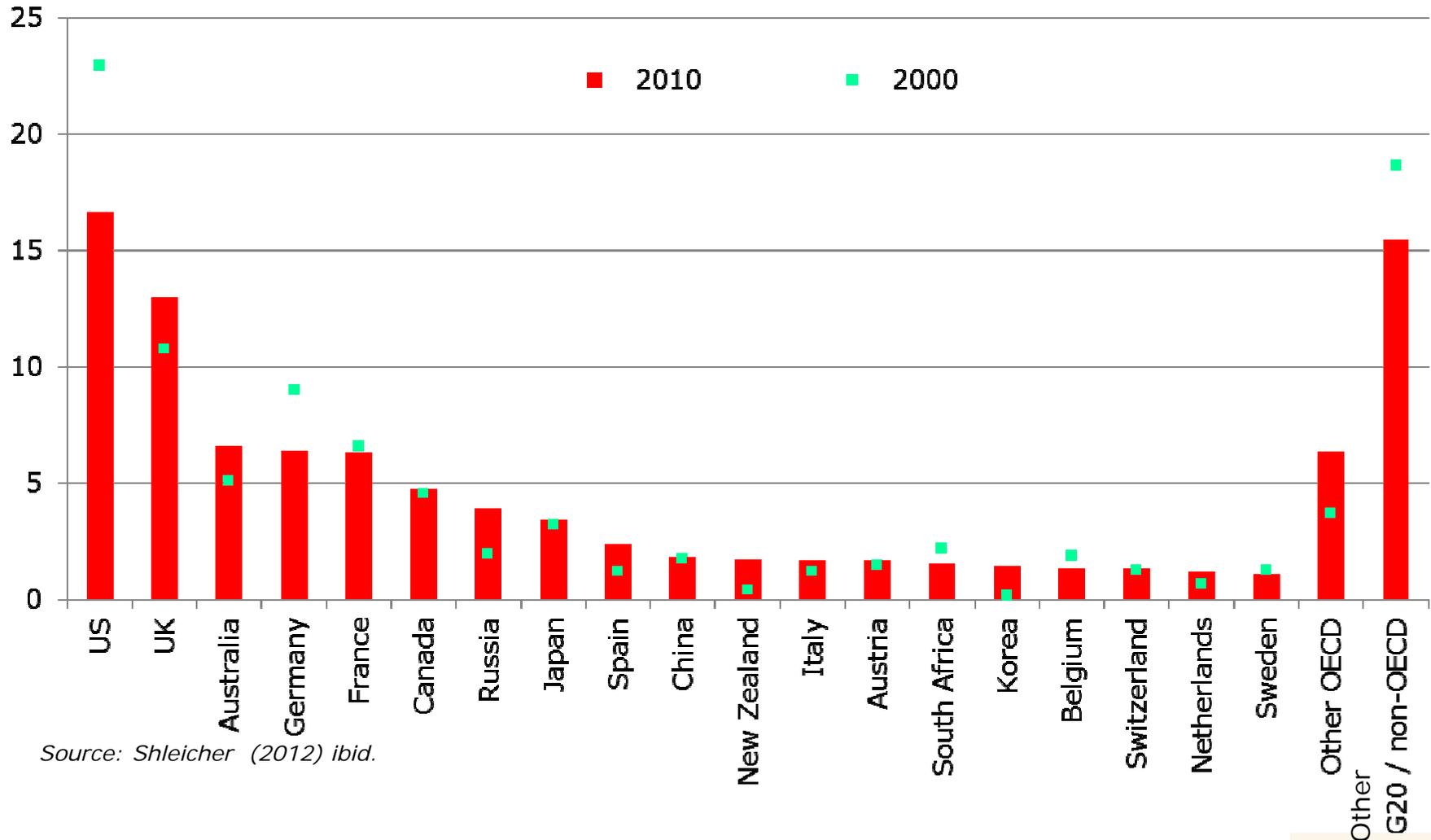
Source:  
UN Population Division,  
Oxford Economics (2011)

# Asia's changing population pyramid



Source: Population Division of the Department of Economic and Social Affairs of the United Nations Secretariat

# Changing market share (%) of foreign HE students enrolled, by destination, 2000-2010



Source: Shleicher (2012) *ibid.*

# Particularly strong growth in vocational learner numbers in emerging countries

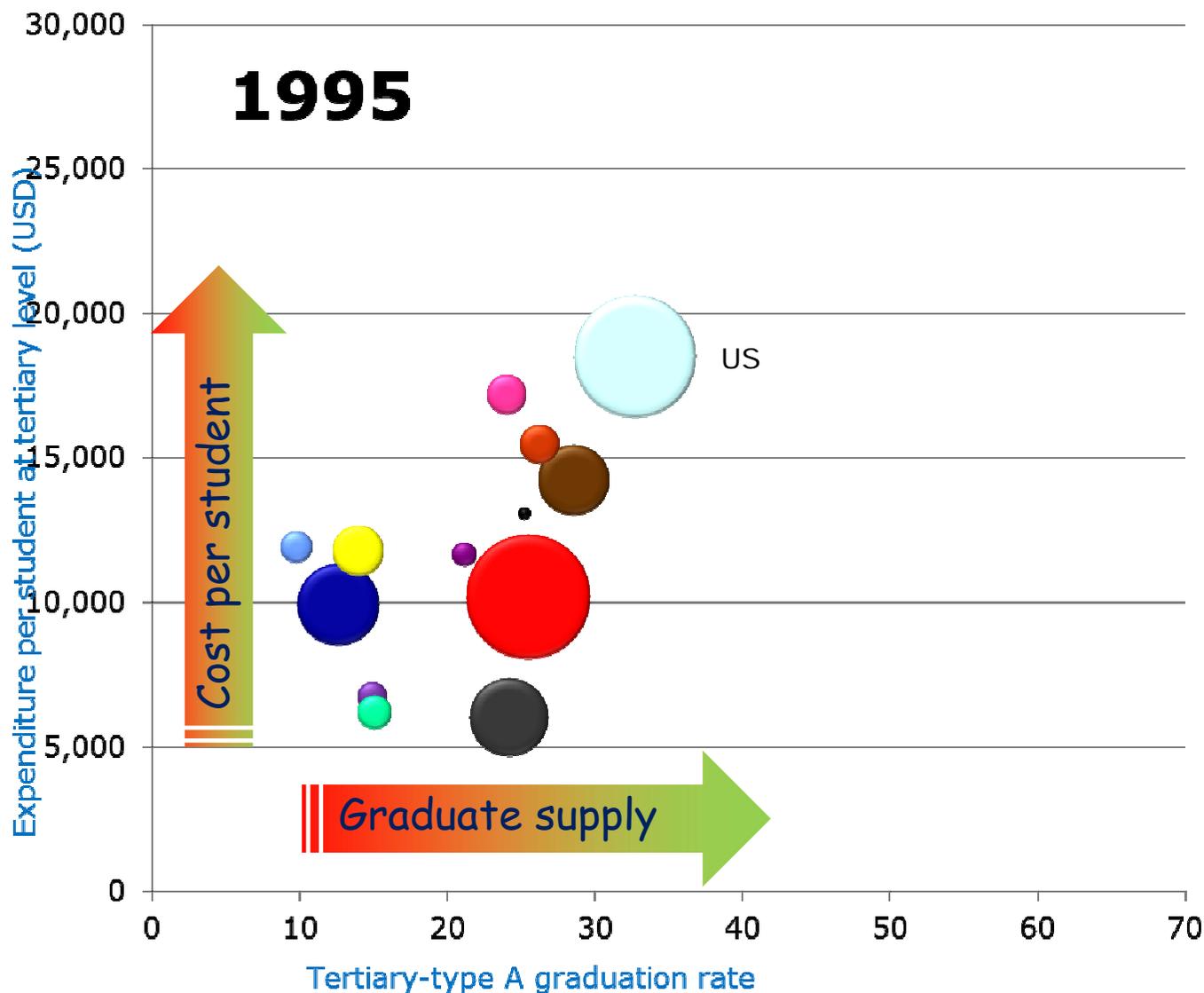
Different types of higher education around the world...

Annual Change in Students by Region<sup>4</sup>

| Region                         | Average Change in Vocational Students | Average Change in Academic Students |
|--------------------------------|---------------------------------------|-------------------------------------|
| Central & Eastern Europe       | -4%                                   | -1%                                 |
| Central Asia                   | -1%                                   | -1%                                 |
| North America & Western Europe | 0%                                    | 3%                                  |
| Arab States                    | 7%                                    | 8%                                  |
| Latin America & the Caribbean  | 7%                                    | 3%                                  |
| East Asia & the Pacific        | 10%                                   | 5%                                  |
| Sub-Saharan Africa             | 20%                                   | 16%                                 |
| South & West Asia              | 41%                                   | 12%                                 |

Source: *The Education Advantage* (2012) *The Research Base* <http://goo.gl/o7AeS> based on US Census Bureau, World Bank and UNESCO data

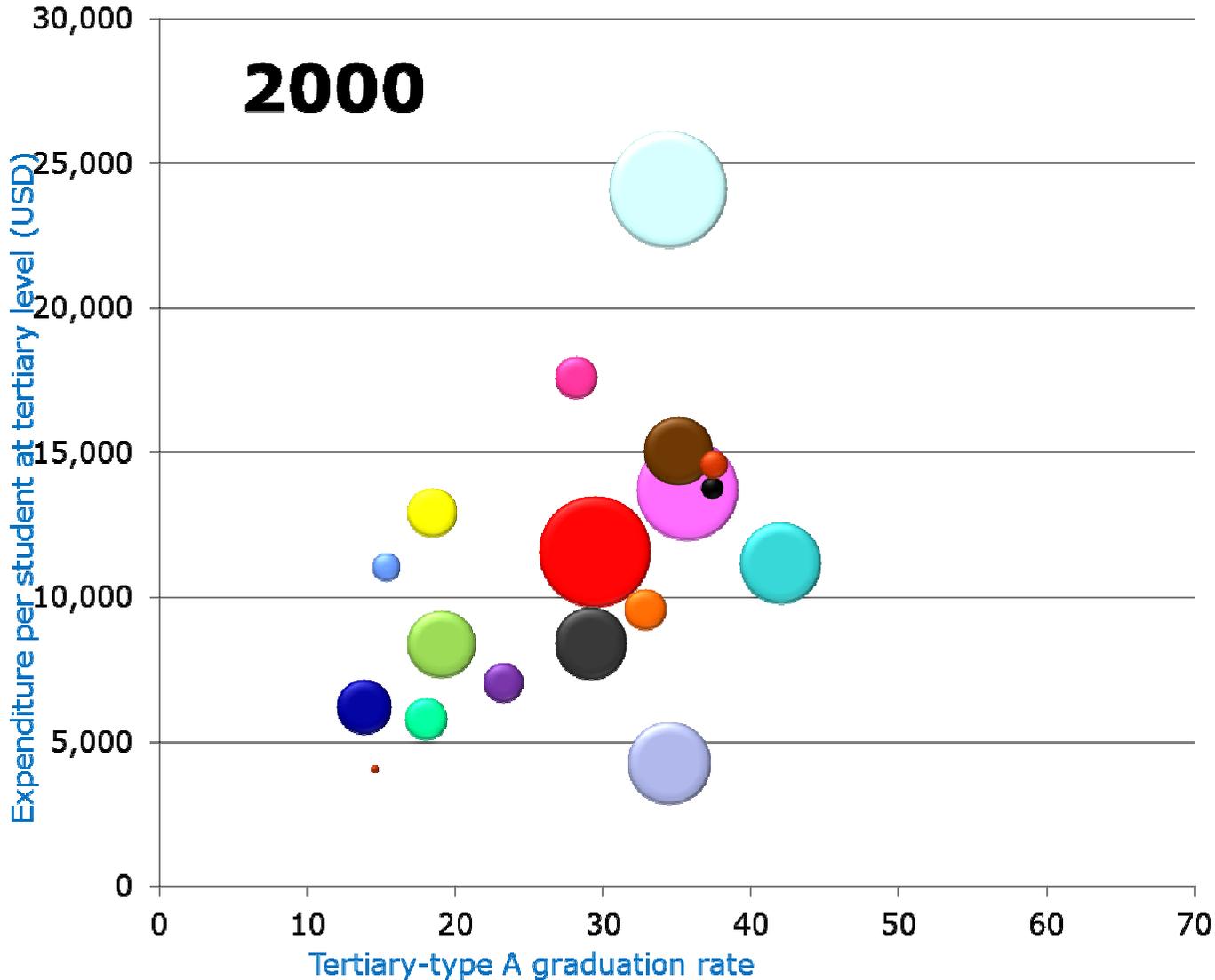
# Costs and graduation rates over time



Source:  
Shleicher  
(2012) ibid.

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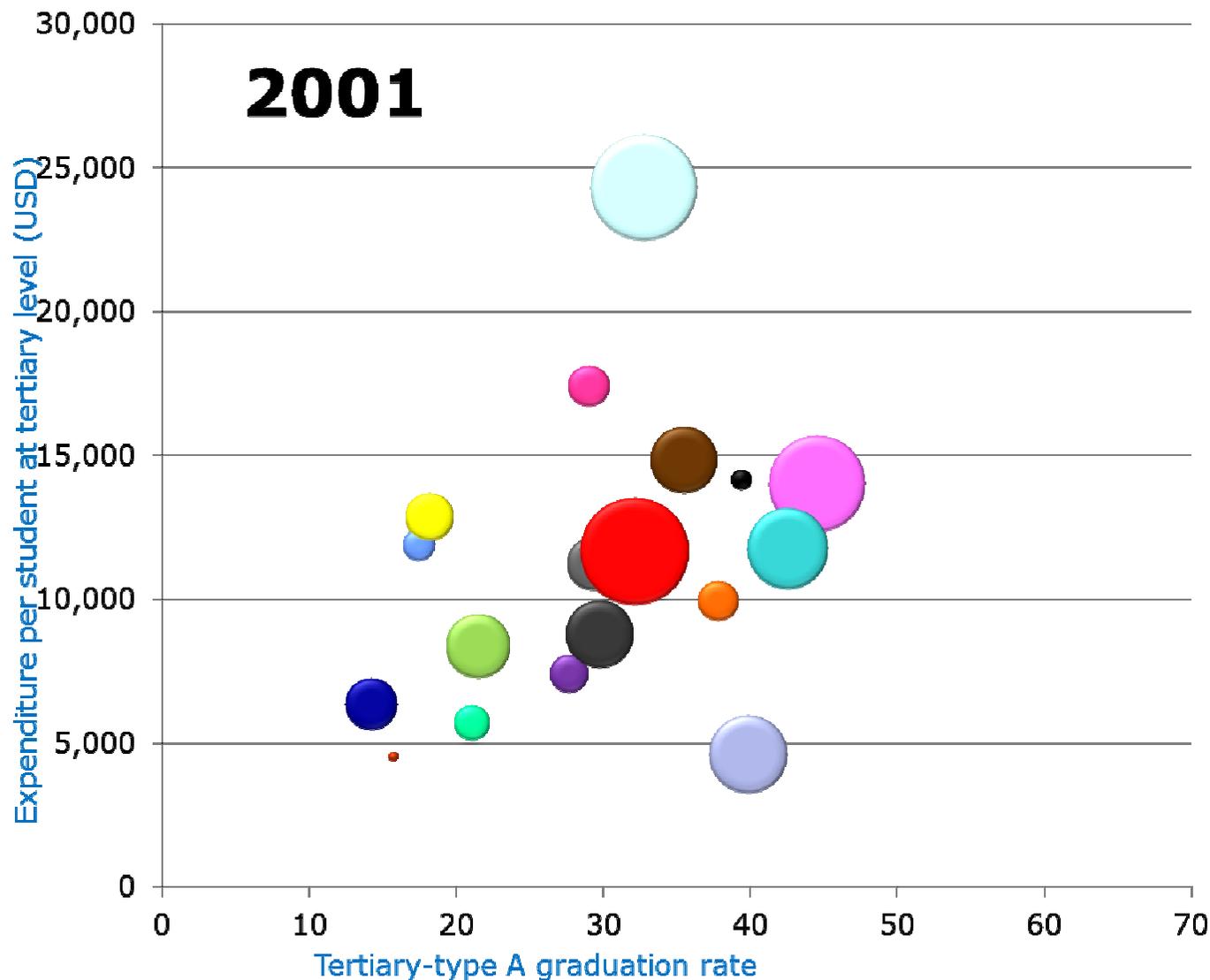
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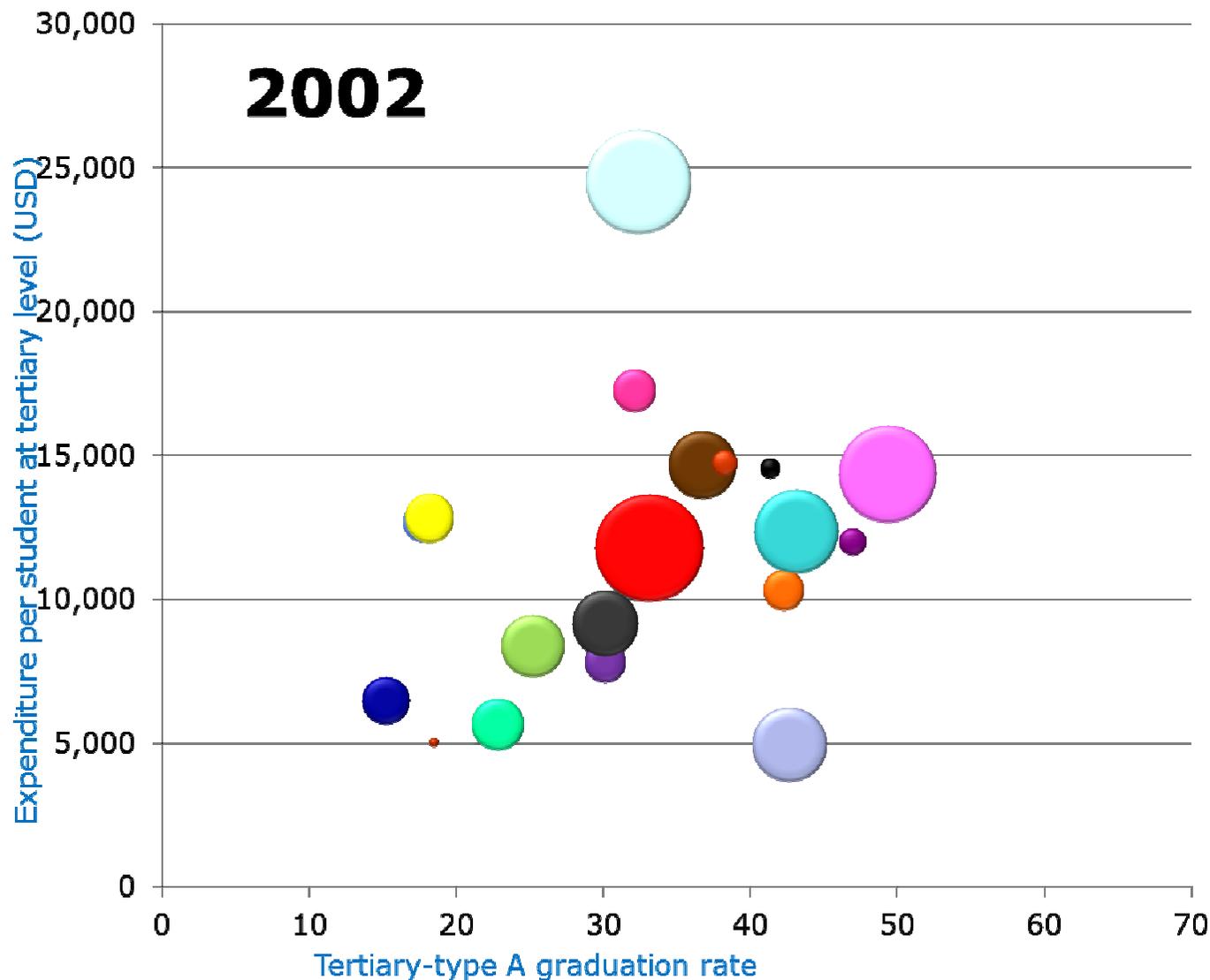
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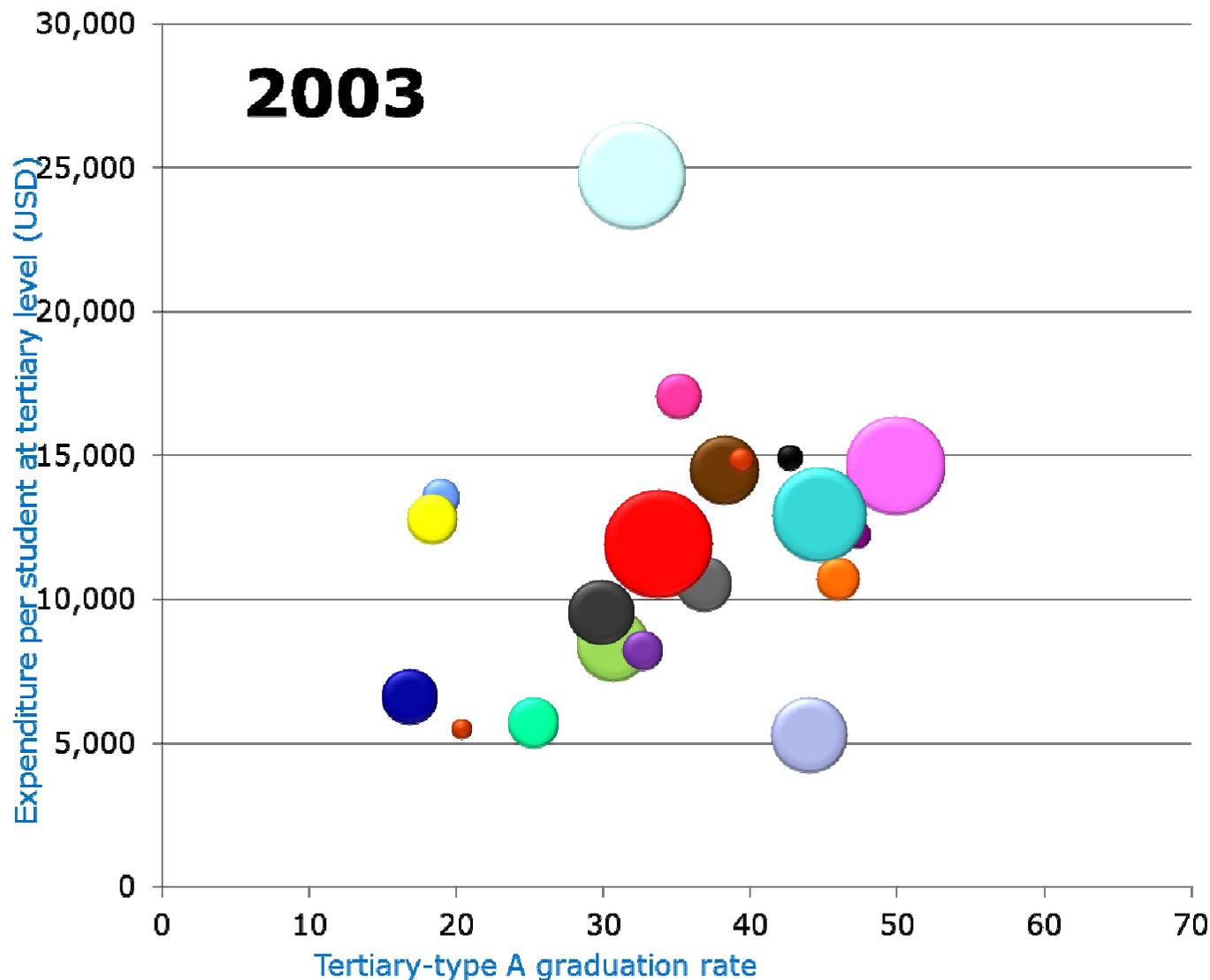
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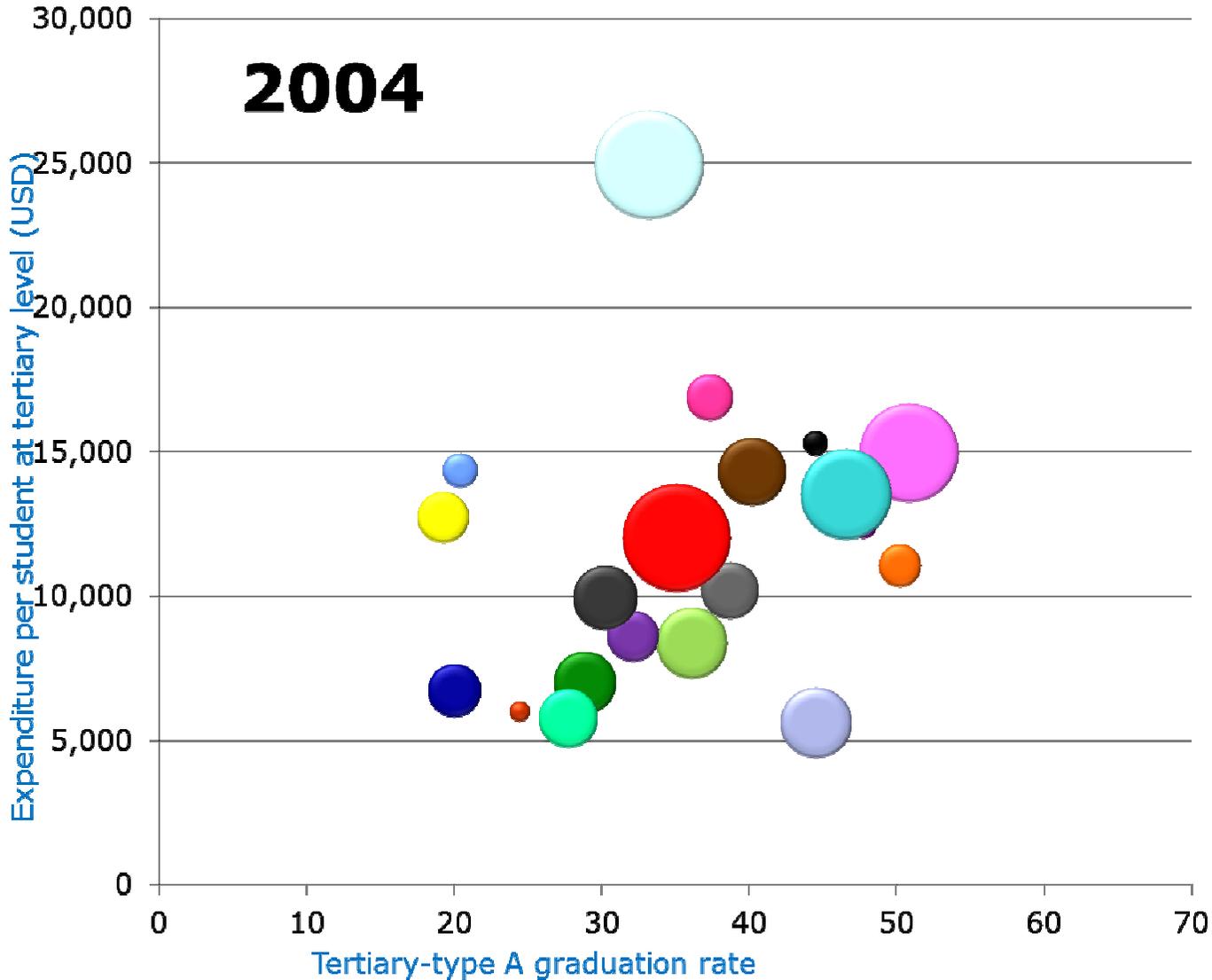
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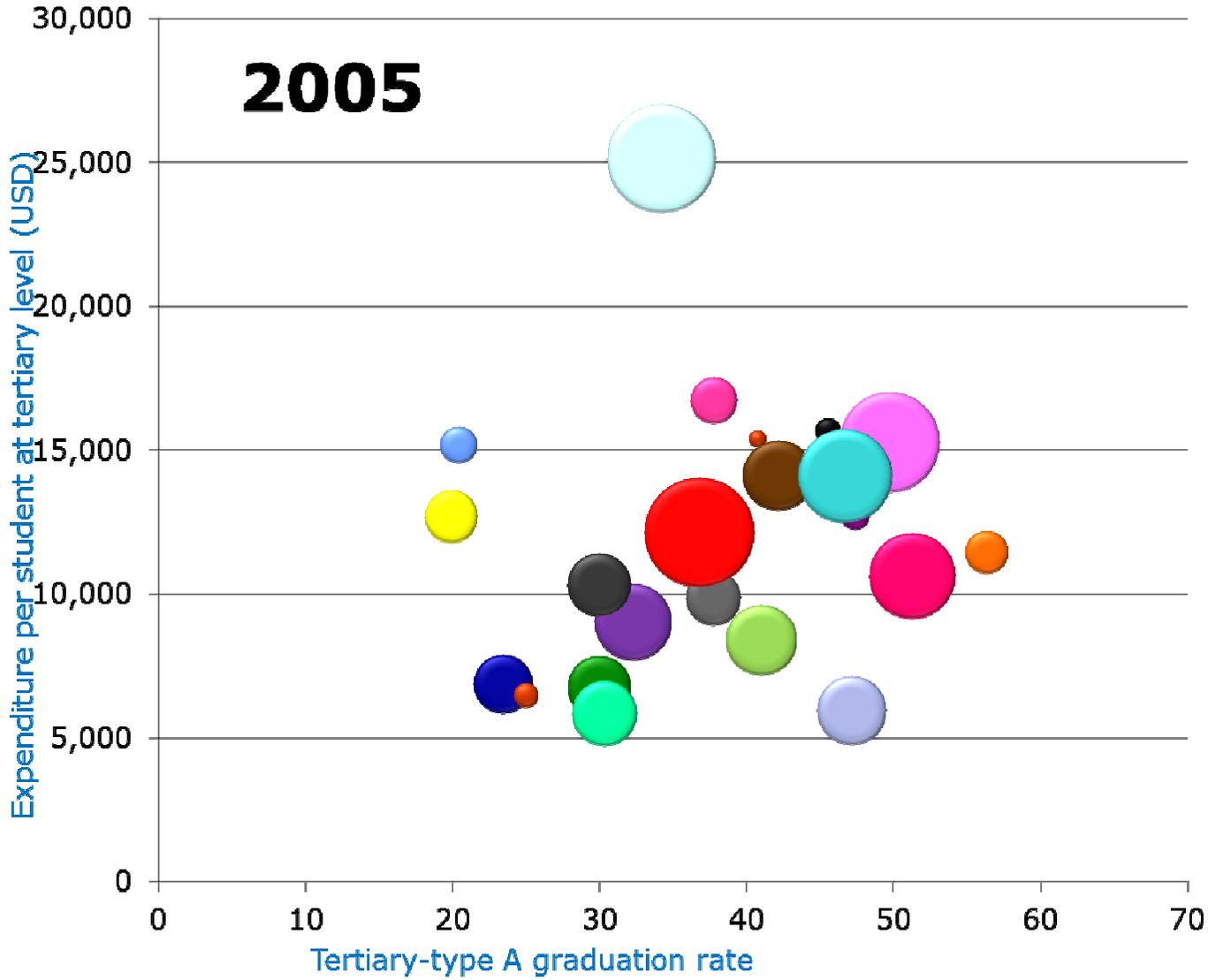
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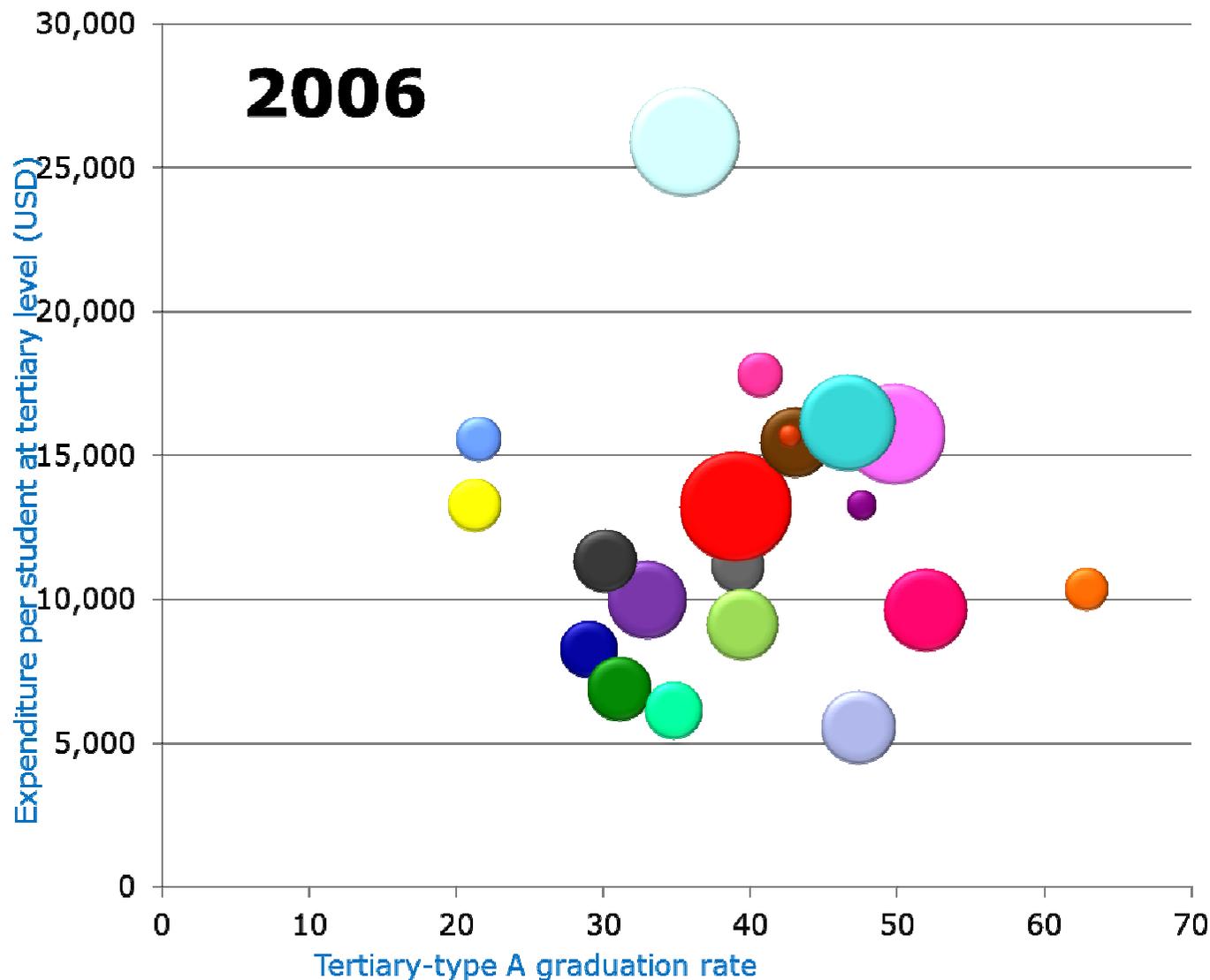
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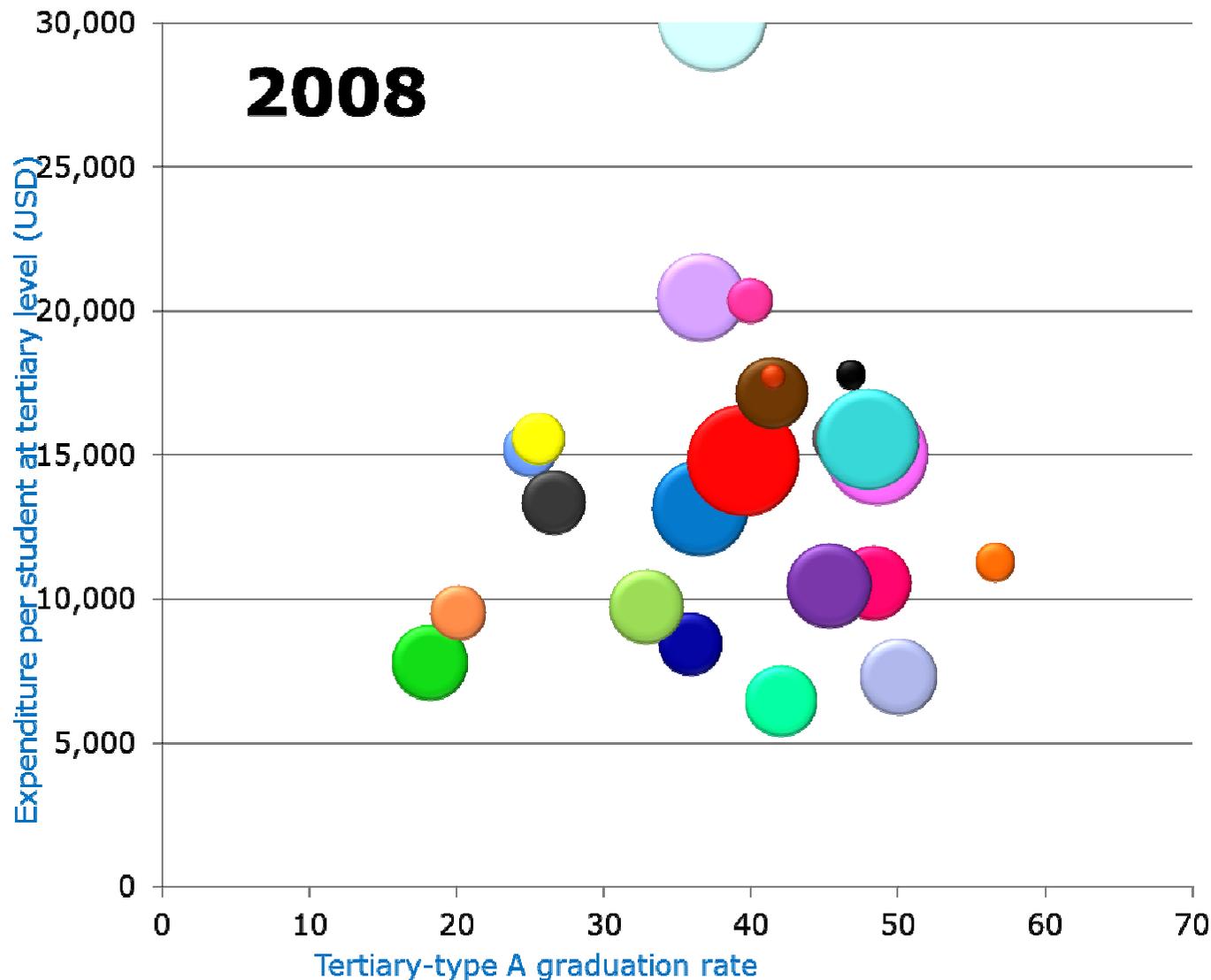


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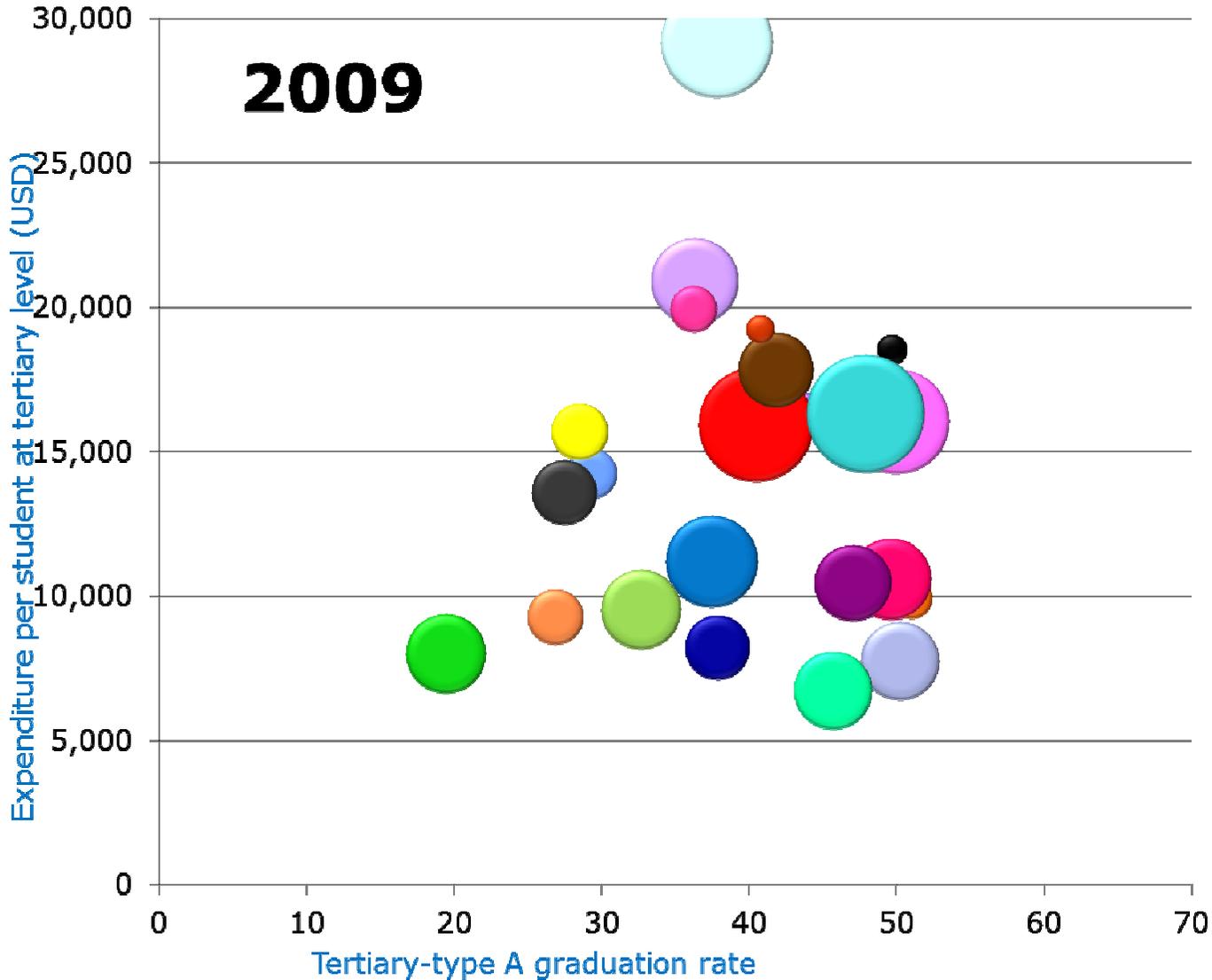
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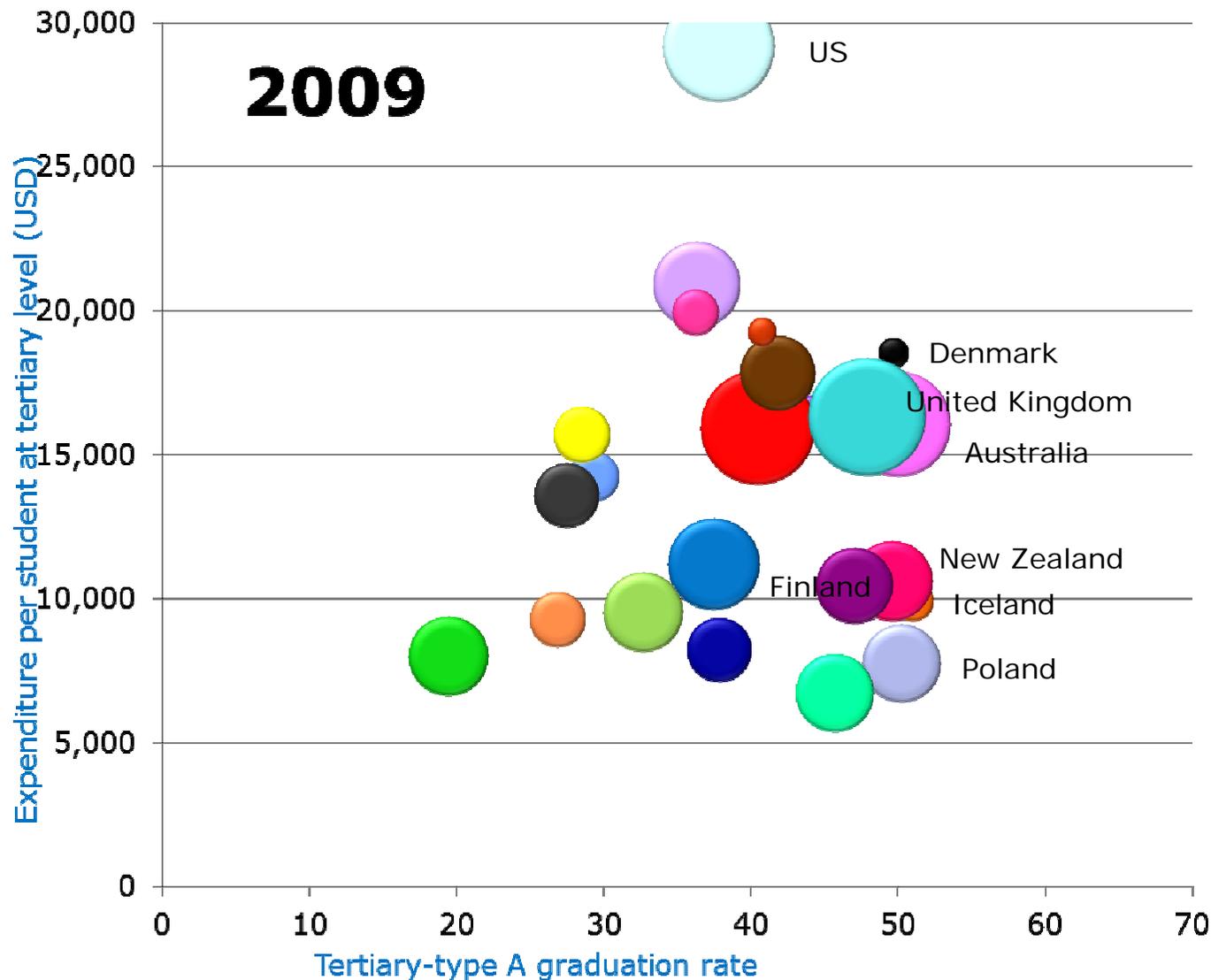
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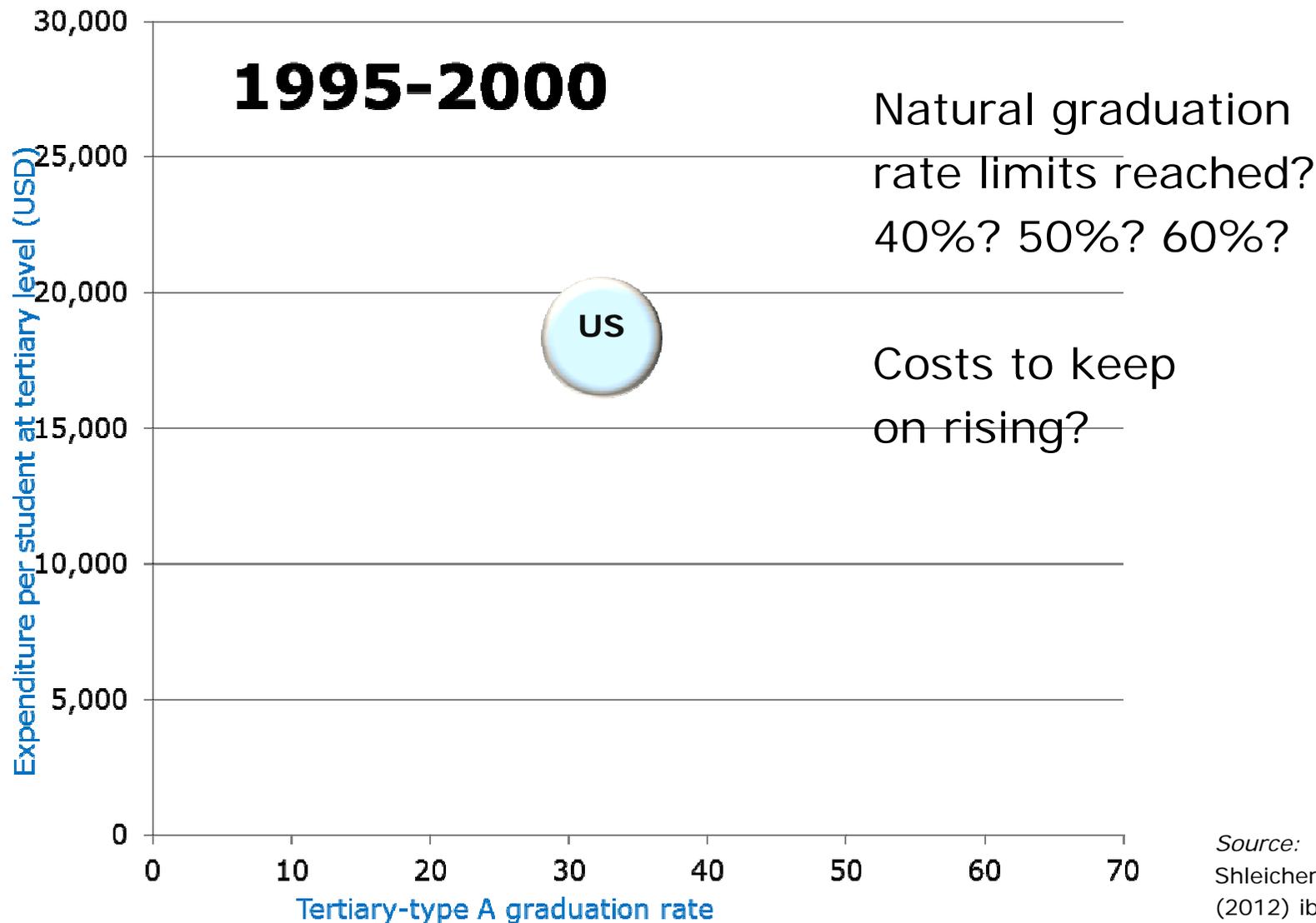
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# US costs + graduation rates over time



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# Revolution or evolution?

# 3

# Funding in flux in many nations

HE serves many missions (and masters)

Is it losing out to other priorities (e.g. schools, health) in a tough economic context? US deficit, UK austerity, Australia mineral wealth already spent(?)

When US HE leaders had to select from 14 'key challenges', 4 money issues topped the list;

- Potential cuts in federal student aid 83%
- Budget shortfalls 70%
- Cuts in state spending 67%
- Rising tuition fees / affordability 66%

*Source:* Jaschik and Lederman (2012) Survey of College & University Presidents, Inside Higher Ed <http://goo.gl/qZuuc>

# Public funding switching to private sources

Rising demand and restraints on public resources

Evidence of private (individual benefit)

Increasing willingness / ability to pay

Trend in the USA and (sharply) in the UK

Some Indonesian institutions recently quadrupled their fee income

In Vietnam many institutions now get <40% of their income from fees

Some institutions becoming more entrepreneurial, new funding models

*Source: Asian Development Bank, Higher Education Across Asia: An Overview of Issues and Strategies, Asian Development Bank, November 2011, p.18. <http://goo.gl/1isug>*

# Growth of private providers

UK government looking to 'level the playing field' for new entrants, reforming quality assurance measures and Degree Awarding Powers, hoping to drive efficiency in the market

In Indonesia, Japan, Malaysia, Korea, and the Philippines, private universities now enrol the majority of students

*Source: Asian Development Bank, Higher Education Across Asia: An Overview of Issues and Strategies, Asian Development Bank, November 2011, p.19. <http://goo.gl/1isug>*

# The English funding experiment (/gamble?)

All the dice thrown at once, especially for funding

Most direct funding gone, tripled tuition fees

1998 <£1k

2004 <£3k

2012 <£9k

Average 2013/14 fee £8,507

£7,898 with support (good luck making sense of all that...)

Average UK undergraduate debt now highest in the world

Closer to what international students pay

*Sources:* Tuition fee hike 'will make English degrees most expensive in the world' (2011) Telegraph <http://goo.gl/Gpv3f>

# Impact of higher fees in England

No conclusive evidence putting applicants off, lower than predicted impact on overall numbers (-10%) and disadvantaged learners (-1%)

But apparently bigger impact on mature learners (e.g. -12% for 19-25 year olds) – questions ability of ageing economy to 're-skill'?

Some studies unclear if it will save the Treasury much, if anything in the long run

*Sources:* Thompson J. and Bekhradnia B. (2012) The cost of the government's reforms of the financing of higher education, Higher Education Policy Institute (HEPI) Report 58, Oxford p.11 <http://goo.gl/30L2v>; Thompson J. and Bekhradnia B. (2012) The impact on demand in 2012 of the Government's reforms of HE, Higher Education Policy Institute (HEPI) Report 59, Oxford

# Marketisation and student consumers

Rise of inter/national competition, sometimes brings a sense of loss that requires debate (e.g. in the UK see the Campaign for a Public University and the Council for the Defence of British Universities)

More information (e.g. Key Information Set [KIS] in UK, MyUniversity in Australia) and choice... but who is equipped to choose? And what about more complex outcomes such as competencies or values?

Sector responses; external re-grouping, internal reconfiguring, strategic partnerships, shared services, specialisation, spin-offs, internationalisation, inter-disciplinary teams, entrepreneurship, incubators, proving impact, 'squeezed middle' institutions in the UK

Will HE come out stronger and more competitive? Nobody knows yet...

# HE driving equity, fairness and social mobility

Balancing access and equity...

Governments try to make it a core objective for institutions (e.g. Australia and UK) but more could be done (both central funding and institutional prioritising)

New UK access agreements (with fines), postgrads the 'next' frontier

Changes to admissions policies e.g. China moving away from single exam rounds, (contested) use of contextual data in the UK

*Sources: Asian Development Bank, Higher Education Across Asia: An Overview of Issues and Strategies, Asian Development Bank, November 2011, pp.26-27. <http://goo.gl/1isug> , Postgraduate education (2012) Higher Education Commission <http://goo.gl/Mr8PI>*

# Diverse, strategic networks of partners: international, national, regional and local

Third mission – community and social engagement

Partner schools and colleges

Employers

Suppliers

Strategic partners – first Google or Apple course/university?

Voluntary orgs / charities – first Amnesty Intl. or Oxfam course/uni?

More institutional collaboration (or competition)?

# Educating the 'whole' learner

Global growth of more holistic approaches (***beyond just knowledge***); skills, employability, attributes, 21<sup>st</sup> Century skills, critical thinking, problem solving, communication, team work, E.Q., digital skills...

***But also beyond just competencies***; (social) innovation, (social) enterprise, sustainability, global citizenship, extra-curricular activities, volunteering, service-learning, creativity etc... ***teaching values?***

Young people increasingly expect learning that creates 'flourishing' communities, beyond employment or average salaries

But challenging with low growth and high graduate unemployment

Sources: Ananiadou, K. and M. Claro, *21st Century Skills and Competences for New Millennium Learners in OECD Countries*, OECD Education Working Papers, No. 41, OECD Publishing, 2009, p.5. <http://goo.gl/vLFTF> , FutureTrack (2012) HECSU <http://goo.gl/owidY>

# Is technology part of the answer...

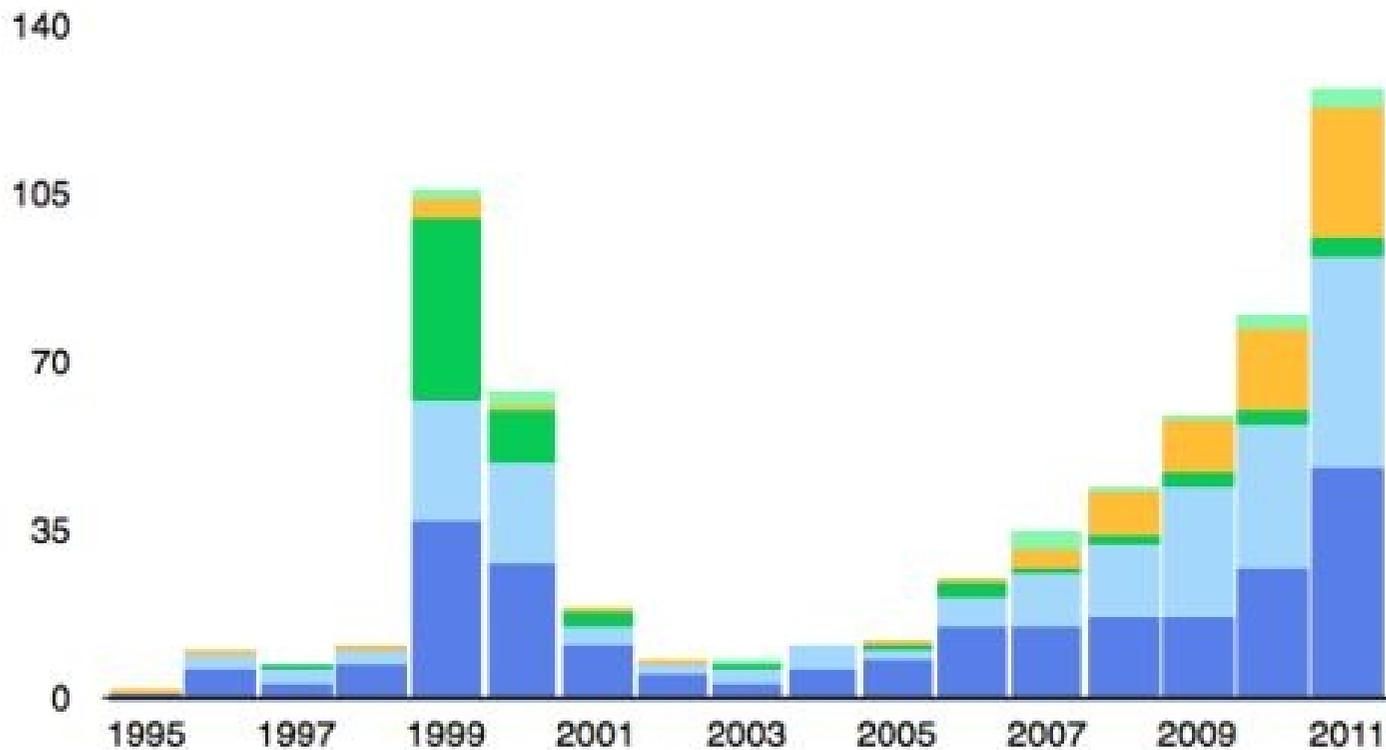
The future looks pretty bright and exciting, here's a starter for 10:

1. **MOOCs**, democratising revolution or marketing for known brands?
2. **Blended learning** offering seamless face-to-face/online experiences
3. **Tablet and mobile pedagogy** as developing areas of practice
4. A flourishing **learning applications** (apps) market of proven impact
5. **Social learning** more common with teaching and learning in teams
6. **Virtual learning** simulations bringing ever-more realistic activities
7. **Game-based learning** that is engaging, social and technical
8. **Gesture-based learning** that is intuitive and interactive
9. The **internet of things** with learning data gathered all around us
10. **Smarter data use**: instant, open, actionable and invisible

# Is technology part of the answer...

...or are we just heading into another *bubble*?

Boom - Bust - Boom - Number of Deals<sup>156</sup>



Source: GSV Advisors, American Revolution 2.0, p.311 <http://goo.gl/1ZdOq>

# Winning the argument about value(s)

Coherent national vision needed for *whole* sector, in all its diversity

Persuade government of value over other priorities (budgets, elections)

Persuade the public of the benefits of HE ('consumers', voters)

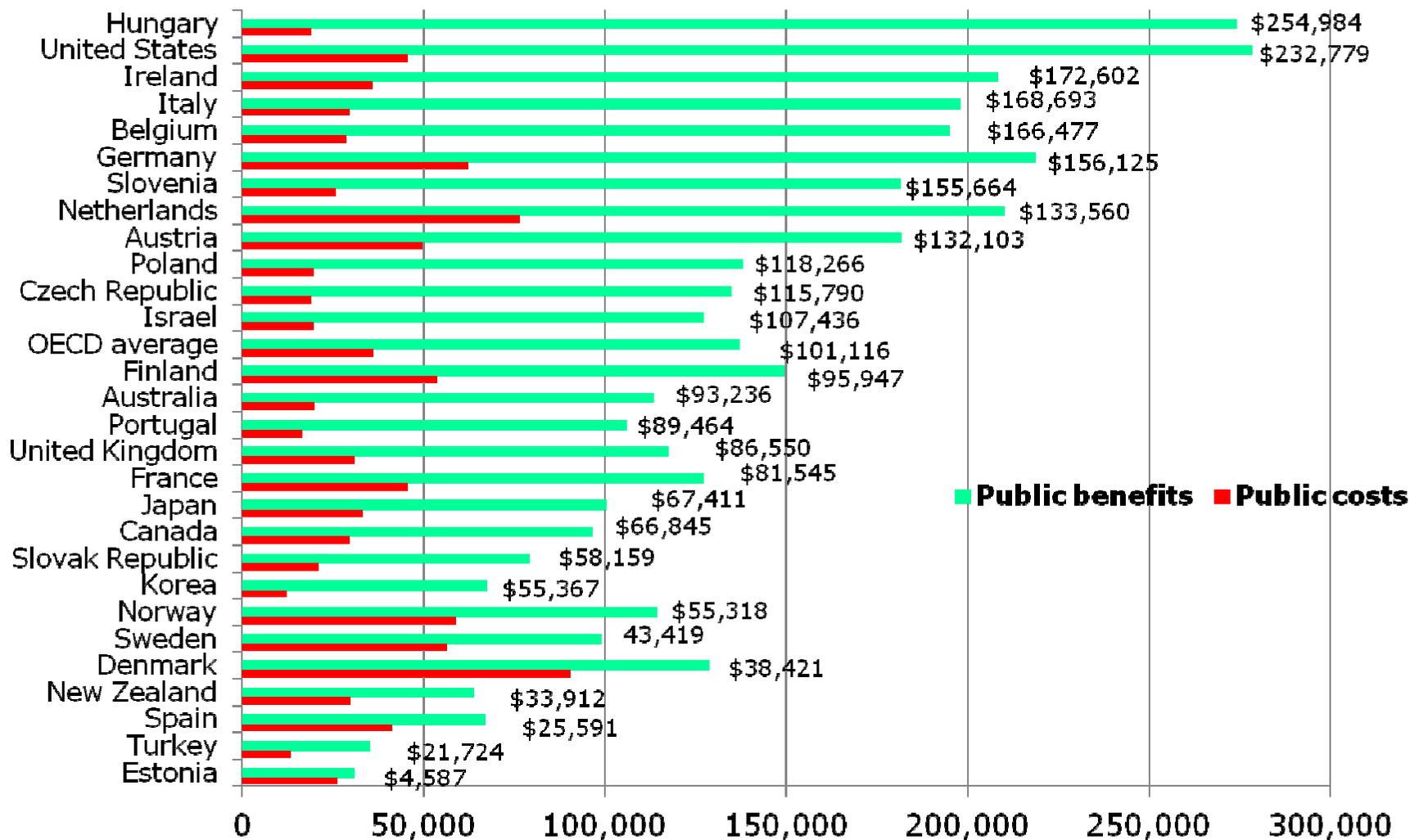
Persuade employers and other partners to engage

Reshape itself to respond and lead

A new narrative for HE: *the* long-term engine of growth, powerful in its diversity and dynamism, key to improving our future society (e.g. non-financial benefits, wellbeing, sustainability and above all *values*)

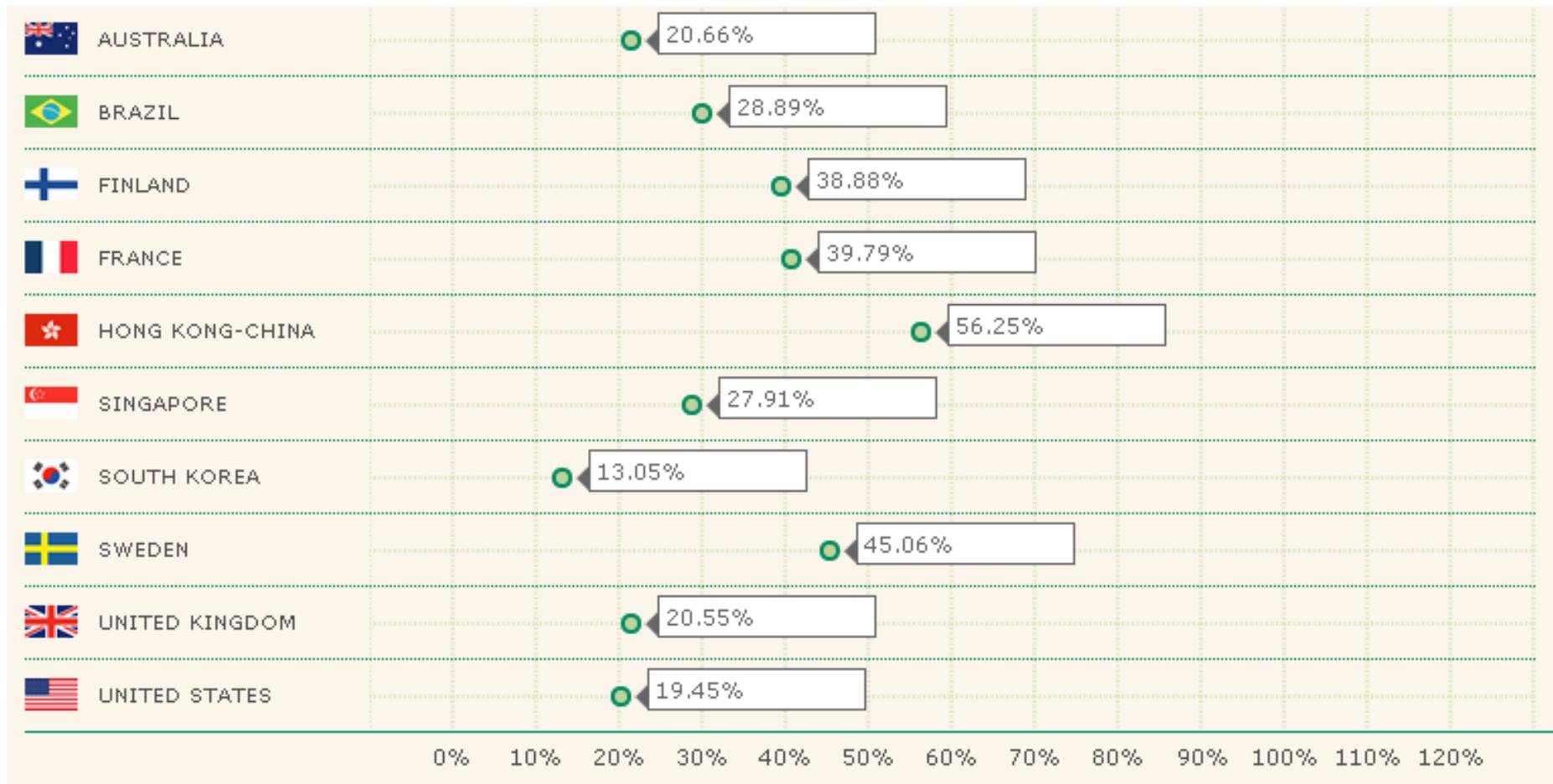
A *revolution* is required (especially in equity, technology and social engagement)... but funding constraints and a lack of coherent strategy risks making *evolution* more likely

# HE pays – for the individual and for society



Source: Shleicher (2012) *ibid.*, public cost and benefits of higher education for a man obtaining tertiary education (2008 or latest available year) in USD equivalent

# 2009 public spend per student as % of GDP



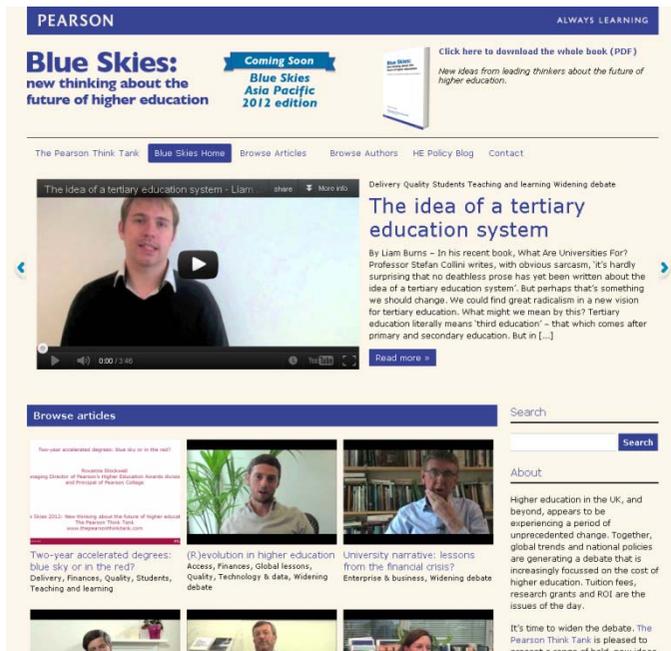
Sources: The Learning Curve (2012) Pearson / Economist <http://goo.gl/zFcRP> - main data source UNESCO Institute for Statistics (UIS)

One of our projects

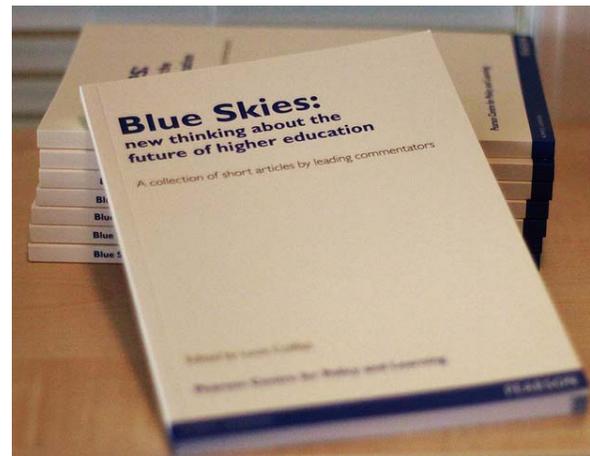
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# Blue Skies – new thinking about the future of HE

Platform for debate: short, original articles by global experts  
A5 book accompanied by <http://pearsonblueskies.com>  
Editions: UK (2011, 2012), Spanish (2011), Asia-Pacific (2012) so far...  
60+ articles and counting, all content available for free



The screenshot shows the Pearson Blue Skies website interface. At the top, it features the Pearson logo and the tagline 'ALWAYS LEARNING'. The main heading reads 'Blue Skies: new thinking about the future of higher education', with a 'Coming Soon' badge for the 'Blue Skies Asia Pacific 2012 edition'. A link is provided to download the whole book (PDF). Below this, there is a navigation menu and a video player showing a man speaking. The video title is 'The idea of a tertiary education system'. To the right of the video, there is a 'Read more' button. Below the video, there is a 'Browse articles' section with a search bar and a list of articles, including 'Two-year accelerated degrees: blue sky or in the red?' and 'Evolution in higher education: Access, Finance, Global lessons, Quality, Technology & data, Widening debate'.



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*Willetts, 2011 launch*



*Willetts, 2012 launch*

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# Access for all: new evidence on young people and the costs of HE



THE STRATEGIC  
SOCIETY CENTRE  
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Original research by The Strategic Society  
Supported by the Pearson Think Tank and Universities UK  
Exploring the impact of tuition fees on applications, due Spring 2013  
<http://thepearsonthinktank.com/research/value-for-money-in-higher-education/>

PEARSON ALWAYS LEARNING

## The Pearson Think Tank

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### New research launched to explore if young people are put off university by the cost, and why

Written on August 21, 2012 by Mohammed Alam in [Fair access to HE](#), [Featured](#), [Research](#). Tags: [access](#), [HE](#), [Higher Education](#), [Universities](#), [University](#)



A major new research project has been launched exploring whether young people are put off going to university by the cost, and if so, why.

"Access for All: Evidence on Young People and the Costs of Higher Education" will look at the decisions of over 5,000 young people to investigate what factors drive young people to consider not going to university and how important cost is as a factor.

The research, which involves analysis of data from the Longitudinal Study of Young People in England (LSYPE), will also go on to examine the characteristics of these young people at an earlier age, looking at who among those with financial worries do go on to university and why.

The research has been made possible by support from Universities UK and the Pearson Think Tank.



# Other research projects by the Pearson Think Tank

## 3) *Future Universities*

Partnership with think tank **DEMOS**  
<http://thepearsonthinktank.com/research/future-universities/>

The screenshot shows the Pearson Think Tank website. The header includes the Pearson logo and the tagline 'ALWAYS LEARNING'. The main navigation bar has links for Home, About Us, Research, Publications, Policy Watch, Events, Blogs, Contact Us, and Sign Up. The page title is 'Future Universities'. The main content area features a bullet point: 'Demos launched this research paper on the future of higher education in England, supported by the Pearson Think Tank. It explores how recent Government reforms could be modified in order to protect and promote the following three 'principles of success' in English higher education:'. Below this are three sub-bullets: 'open competition for the best students and staff', 'institutional autonomy', and 'the 'Robbins Principle' which states: 'courses of higher education should be available to all those who are qualified by ability and attainment to pursue them and who wish to do so''. A second bullet point states: 'The paper puts forward several policy recommendations germane to the current UK government's reforms, calling for some significant changes.' A third bullet point is: ''Future Universities' paper by Demos – supported by the PearsonCPL'. Below this is a 'Launch event summary' and a 'Read on' button. On the right side, there is a 'Twitter' section with three tweets: 'Pearson Think Tank: BBC News - #GCSE grade changes affected 10,000 students', 'Pearson Think Tank: BBC News - #Gove denies political interference in #GCSEs', and 'Louis M M Coiffait: Quick straw poll - on a scale of 1-10 how likely is the Higher Education Minister to be shuffled?'. Below the tweets is a 'Tag cloud' section with the tag 'David Gove'.

## 4) *Enterprise & entrepreneurship education*

## 5) *Open Education Data*

## 6) *Careers 2020*

## 7) *Academies Commission*

With more to follow...

- Are these the right topics?

- What issues matter to you?

# Comments & questions?

# 5