

## **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 11 February 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.

### **Further information**

3. Available from Michael Barber.

## Horizon Scanning Panel report

February 2019

### The role and vision of the panel

1. The chair provided an introduction to the panel and set out his vision for its work: to bring future perspectives to bear on the work of the Office for Students (OfS). In particular, to look to the future over the 5-10 year horizon and anticipate and consider trends that will affect students, the sector and the OfS, with a view to recommending practical action wherever possible. The establishment of the panel is an important step in further developing a forward-thinking approach within the organisation.
2. The panel discussed the importance of identifying measures of success for the group. It was agreed that the panel needed to focus the value generated by its activity, rather than pontification for its own sake.

### Opportunities and threats to the sector over the next 5-10 years

3. The panel took part in an open discussion about potential threats and opportunities to the sector over the next 5-10 years, drawing upon their vast experiences and backgrounds. While not comprehensive, the discussion surfaced several potential areas for the panel to explore in more depth in the future. A summary of the main discussion points follows:
  - a. *Artificial Intelligence (AI)* - If implemented correctly there is the possibility of providers utilising AI to contribute to making high quality education available to all through technological innovations and machine learning. AI could be used as a tool to transform the way education is valued and delivered, further opening up the sector to potential higher education students by removing physical and geographical barriers. Future development would need to be a combination of computer and human development.
  - b. *The changing world of work* - The nature of work and attitudes towards it continue to change, as do the skill demands of the labour market. There are opportunities for higher education providers to further develop their higher education offer to skill and re-skill students appropriately.
  - c. *A brilliant sector* - UK providers have a strong track record and continue to foster innovative provision, and this translates to a powerful international brand. It will be important to consolidate this and maintain the standards of education that have been reached.
  - d. *Global mega trends* - There are a number of global megatrends that will have an impact on the higher education sector. The discussion included demographic changes including falling birth rates, increased longevity, and increasing inequality.

- e. *Regulation* - The introduction and implementation of our regulatory framework is expected to have a profound effect on the sector over time. Possible implications include an increase in new smaller entrants; challenges to the more traditional widely practiced methods of teaching; the creation of more diverse routes to higher education where fair access and success thrives; and potentially (in conjunction with the Post-18 Review) increased provision through further education along with greater consistency in regulation.
- f. *Social Trends* - The group identified a number of social trends which might threaten the sector: there is a risk that censorship undermines freedom of speech and thought; expectations of higher education providers being the main way of breaking the social mould to improve individuals' prospects without due regard to other factors; (lack of) awareness of the breadth and depth of what providers do and their impact; changing perceptions of the value of a higher education qualification; high living costs impacting on affordability of studying away from immediate locality.

#### Focus for the first year

4. Following discussion on opportunities and threats to the higher education sector the panel agreed the following list of potential areas to focus upon for the first year:
  - a. Global megatrends.
  - b. Demographics, the changing nature of the British population.
  - c. UK social trends.
  - d. International trends amongst higher education providers and students' movement.
5. In order to maintain the focus on making a tangible difference to the OfS, the panel agreed to discuss and approve its measures of success at its next meeting.

#### Future panel meetings

6. The next meeting will take place on 29 April 2019.