

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 24 June 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, chair of the Horizon Scanning Panel.

Horizon Scanning Panel report

June 2019

Measures of success for the panel

4. The panel considered the paper proposing a set of measures for the panel to be judged, and to judge itself, against.
5. The panel approved the measures subject to the amendments made during the meeting.

Structure of future sessions

6. The panel discussed the format and arrangements of future meetings, including actively searching for signals to prompt internal discussion.

The independent review of post-18 education and funding: the Augar review

7. The panel received the paper summarising recommendations from the review that are of relevance to the panel, as well as recommendations that are directly relevant to the OfS.
8. The panel discussed the uncertainty regarding uptake of the review recommendations and provision of funding to the higher education sector. The panel noted how useful the review was generally in terms of data and trends, and discussed how AI and machine learning might affect the labour market and the report's conclusions.

Global megatrends

9. The panel received the paper providing a summary of the following five global trends:
 - Climate change
 - Population growth
 - Demographics
 - Digital revolution
 - Resource scarcity
10. The panel discussed how these megatrends impact on the higher education sector and their interdependencies.

Trends in global post-school education activity and the potential impact upon English higher education providers

11. The panel received this discussion document and considered the observations regarding the lack of correlation between gross enrolment ratios in higher education systems and economic performance of a system's country.

12. The panel further explored the role of geography and demography in areas of higher education growth, and the impact this might have on English higher education. The panel requested a paper for the next meeting on international student mobility.

Demographics and the changing nature of the British population

13. The panel received the paper providing a summary on the following forecasted UK and international demographic trends:

- General UK population forecasts
- Predicted growth in UK student numbers
- Predicted growth in student population from London
- Predicted shifts in the international student population

14. The panel discussed in depth the flow of international students and the declining number of mature students. The panel suggested that the OfS considers the importance of non-STEM subjects which are strategically important, including but not limited to strategically important language provision.

UK Social trends

15. The panel received and discussed the paper which signposted existing information on UK social trends. The panel agreed the paper would act as a reference point against which they can consider new and emerging signals.

Future meetings

16. The next meeting took place on 16 September 2019 and the report will go at the November board meeting.