

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 15 September 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 September meeting

3. The Panel received and discussed a presentation on the review of scenarios to inform the next OfS strategy with the aim of:
 - A reminder of what the Panel is seeking to achieve with the scenario discussion - and that the scenarios are intended to be hypothetical narratives about what the future might look like, rather than predictions or expectations.
 - Setting out what scenario 1 might look like with regards to the economy, credentialisation and pedagogy in 2030.
 - The key points of fragility in the higher education system under scenario 1 to inform further scenario development - to be subsequently reviewed by the Panel at their next meeting.
4. The Panel received and discussed a presentation on the review of Digital Teaching and Learning (DTL) report with the aim of contributing to initial findings and disseminating the DTL call for evidence to their networks.

Further information

5. Available from Sir Michael Barber.

Horizon Scanning Panel report

September 2020

Review of scenarios to inform the next OfS strategy

6. It was noted that the timeline for the OfS's new strategy had been adjusted since the Panel last met, to accommodate the possibility of a White Paper on the future of higher education before the end of the year, as well as the arrival of a new chair of the OfS in spring of 2021. Nonetheless, the Panel's contribution to the discussion of the first scenario of three would still be valuable.
7. The Panel received a presentation, a list of data sources/references used and additional reading material with the aim of:
 - A reminder of what the Panel is seeking to achieve with the scenario discussion - and that the scenarios are intended to be hypothetical narratives about what the future might look like, rather than predictions or expectations.
 - Setting out what scenario 1 might look like with regards to the economy, credentialisation and pedagogy in 2030.
 - The key points of fragility in the higher education system under scenario 1 to inform further scenario development - to be subsequently reviewed by the Panel at their next meeting.
8. The Panel discussed the following points:
 - Population growth domestically and abroad.
 - The rise in teaching-only universities.
 - The role of government in subject choice.
 - The relationship between flexible provision, the residential model, and ancillary markets such as accommodation.
 - The uptake (and lack of uptake) of blending learning models.
 - Risks associated with the digitisation of higher education, such as information security.
 - Resourcing challenges created by remote teaching, and its effects on scholarship and research.
 - Trends of rising anxiety in young people and among the teaching workforce.
 - Expansionist policies of other nations seeking to grow their market share of the international higher education landscape.
 - The role of research in driving league table rankings and international demand.
 - The contribution of UK higher education to international social inequality.

Review of Digital Teaching and Learning (DTL) report

9. The Panel received a presentation in addition to DTL background reading.

10. The presentation included the following key points:

a) Project overview

- The DTL review in English higher education was commissioned by the Secretary of State for Education in June 2020 and will be led by Sir Michael Barber. The review will consider:
 - The use of digital technology to deliver remote teaching and learning since the start of the pandemic and to understand what has and has not worked.
 - How high-quality DTL can be continued and delivered at scale in the future.
 - The opportunities that DTL present for English higher education in the medium to longer-term.
 - The relationship between ‘digital poverty’ and students’ DTL experience.
- In September 2020, the OfS launched a call for evidence that asks for views on DTL since the start of the COVID-19 pandemic in March 2020. The call for evidence will gather information about the successes and challenges of the swift move to digitally enhanced remote delivery, specifically:
 - What teaching and learning has looked like in this period.
 - How students and staff engage with digitally enhanced remote teaching and learning and what difference digital poverty makes.
 - The opportunities that the change in delivery presents for DTL moving forward.

b) Initial findings

- These covered information gathered from the following sources:
 - Interviews with DTL experts (e.g. digital learning designers).
 - Interviews with senior leaders of higher education providers.
 - Literature review.
 - OfS student polling.

c) Long term opportunities for the sector.

11. The Panel participated in a breakout group activity to discuss five questions posed by the DTL team:

- a) How might the recent “online pivot” caused by the coronavirus pandemic change the shape of higher education in the longer term?
- b) Are you aware of other sectors where technology has been used to reimagine the services or products provided by that sector? How could the higher education sector learn from this?
- c) What opportunities might emerging technologies (e.g. 5G, Artificial Intelligence, Virtual and Augmented Reality) afford the higher education sector?

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- d) What could the government and/or the OfS do to seize the opportunity presented by DTL?
- e) Do you agree with our definition of digital poverty? What do you think the government, providers' and regulator's roles should be in tackling it?

12. The Panel discussed the following points:

- Online provision creates opportunities for geographic and asynchronous access.
- The extent to which online delivery influences users' demand for up to date digital content, which is resource intensive.
- The notion of unbundling higher education.
- Other sectors that might offer useful learning points include banking, law, the NHS, and live music.
- The value of social space outside the classroom for students learning from each other.
- The impact of the recent shift to online learning on inequality.
- Staff digital poverty is often overlooked.
- The importance of professional development of both staff and students over time.
- The importance of evaluation, and the challenges associated with conducting it in an uncertain environment.
- The review should look at innovation internationally and not just the West.
- COVID-19 gives opportunities to be bolder, for example by designing the curriculum differently and collaboratively to address the mental health challenges of students.

Next steps

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

- a) The Panel was asked to disseminate the DTL call for evidence to their networks.
- b) To suggest further reading and contacts for the review team.
- c) The timing of publication of the DTL review is intended to be spring 2021.

Future meetings

14. The next meeting will take place on 16 November 2020.

Paper publication date

15. This paper will be published as soon as possible after the board meeting.