Chapter 3
Rethinking Higher Education Post COVID-19

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Abstract Higher education's economic footprint is significant (fourth largest export sector in the US, third largest in Australia). Accordingly, this chapter will address the higher education sector—particularly how COVID-19 has impacted and will continue to impact the future of higher education. It will begin by briefly discussing higher education as a service, before reviewing recent managerial literature on COVID-19's impact on higher education. The focus and indeed bulk of the chapter will then shift to considering the myriad possible post-pandemic effects on the higher education sector in the eastern hemisphere. Email interviews are conducted with twenty senior academic leaders (including seven Vice Chancellors) in Australia, Bangladesh, Hong Kong, India, Macau, New Zealand, Singapore, Sri Lanka and Thailand. Two broad themes emerge, encompassing actual and anticipated changes to the delivery of education; and to the management of universities—with three sub-themes under each. Findings are then discussed and conclusions drawn.

> *I think higher education is just on the edge of the crevasse. Generally, universities are doing very well financially, so they don't feel from the data that their world is going to collapse. But I think even five years from now these enterprises are going to be in real trouble.*
>
> Clayton Christensen (2013)

3.1 Introduction

Universities are amongst the oldest continuously operating institutions in the world. The University of Karueein (al-Qarawinyyin), founded in 859 A.D. in Fez, Morocco is arguably the oldest, followed by the University of Bologna in Italy (established in 1088). The value of the higher education market globally was US$4.9 trillion in 2015 (Verger 2016). Universities are also among the least understood service systems

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(Lella et al. 2012). Hence, the sector is deep-rooted, valuable and under-researched from a services perspective.

Historically, pandemics have forced humans to break with the past and imagine their world anew (Roy 2020). Will COVID-19 herald the disruptive change and structural reforms that many within and outside the sector have been calling for? Or will it go down in the annals of history as a mere bump in the well-worn higher education road? Or, to para-phrase Bill Gates, will the transformative effects of the pandemic be felt unevenly across the sector? To explore these and other questions, the remainder of the chapter is structured as follows. Higher education as a service is first discussed, before reviewing recent managerial literature on COVID-19's impact on the sector. The focus then shifts to consider the myriad possible post-pandemic lasting effects on the sector—particularly in Asia/Australasia. Specifically, email interviews are conducted with twenty senior academic leaders (including seven sitting Vice Chancellors) in Australia, Bangladesh, Hong Kong, India, Macau, New Zealand, Singapore, Sri Lanka and Thailand. Two broad themes emerge, encompassing actual and anticipated changes to the delivery of education and to the management of universities—with three sub-themes for each. These are presented and discussed in detail, after which conclusions are drawn and author's insights offered.

3.2 Universities as Services

A number of parallels have been identified between services and education (Ng and Forbes 2009; Ledden et al. 2011; Guilbault 2016). Indeed, the foundational premises of the services domain extend to universities and higher education. The introduction of service dominant logic (Vargo and Lusch 2004a, b) represented a significant conceptual development and paradigmatic shift (Svensson and Grönroos 2008; Grönroos 2011; Vargo and Lusch 2017). Within a university context, the 'application of specialised skills and knowledge is the fundamental unit of exchange', forming the basis for their differentiation and competitive advantage (Lusch et al. 2007, p. 7). Moreover, students and teachers are central to the production of the education experience (Naidoo et al. 2011; Guilbault 2016). Indeed, 'there is no value until an offering is used' and in the context of higher education value is always co-produced (Elsharnouby 2015). Educational institutions 'exist to integrate and transform micro-specialised competencies into complex services that are demanded in the marketplace' (Lusch et al. 2007, p. 7). Notwithstanding, product centric logic prevails in the domain of higher education, as is evidenced by the continuing debate surrounding whether students are products or customers (Guilbault 2018; Emery et al. 2001). However, rather than a dyadic exchange, the higher education research domain needs to embrace the networks of interactions which are at the heart of services and the value they offer (Barile et al. 2016).

3.3 COVID-19's Impact on Higher Education

The coronavirus pandemic is causing a 'tidal wave of disruption to the higher education sector' (MacIntosh 2020), resulting in the global higher education landscape 'changing dramatically' due to spread of the virus (Quacquarelli Symonds 2020). More than 1.6 billion students have been affected, representing 91% of all students worldwide (DeVaney et al. 2020). The pandemic has forced global experimentation with remote teaching. Indeed, demand for online learning has skyrocketed—with Coursera posting a 644% year-on-year increase in March 2020 (DeVaney et al. 2020). Unable to deliver on campus learning, universities scrambled to provide academic (and revenue) continuity through "emergency remote teaching". Indeed, universities, alongside many other organisations, are facing multiple difficult decisions and doing their digital "growing up" in real time (MacIntosh 2020) and in full view.

More radical thinking brings into question time and competency. The 'credit hour', and the rigid and complicated rules around academic years, terms and attendance. LeBlanc (2020) calls for competency-based degree pathways untethered to time—and for the sector to 'break from the tyranny of time' in order to unleash a wave of innovation and reinvent itself. Govindarajan and Srivastava (2020) also question the four-year residential program—and what aspects can be digitized and/or commoditized. In a sense, they argue for more 'flipped classrooms' and a 'horses for courses' bespoke approach to online delivery. They go on to note how the increasing cost of tuition further ripens the education market's case for disruption.

In response, this chapter seeks to tap into senior university leaders' early thinking about the pandemic (and their immediate and ongoing response). Accordingly, a convenience sample of twenty senior university leaders across nine Asian/Australasian countries participated (see Table 3.1).

3.4 Research Approach

Spradley (1979) distinguishes between 'grand tour' questions and 'mini tour' questions. Mini tour questions focus on more specific details or smaller units of experience. Given the seniority of the participants, grand tour questions where employed in this study. Specifically, participants were asked what the *new higher education world* might look like once the post pandemic dust settles? What their "New Normal" is and how they are coping with it? What key lessons they have learned during the pandemic (lessons that could assist future academic leaders deal with similar crises)? What aspects of their institution and operation will not go back to the way 'things were' pre COVID? In other words, what permanent changes do they anticipate?

An interview protocol (see Appendix A) promoted consistency of insight and served the purpose of steering the interviews. The protocol encouraged respondents to draw upon 'their own linguistic frameworks' in their responses (Stern et al. 1998, p. 197), thus eliciting descriptions about their lived experiences during the pandemic.

Table 3.1 Study participants

Australia	Vice Chancellor	India	Vice Chancellor
Australia	Vice Chancellor	India	Vice Chancellor
Australia	Pro Vice Chancellor	India	Vice Chancellor
Australia	Pro Vice Chancellor	India	Deputy Dean
Australia	Dean	Macau	Dean
Australia	Dean	New Zealand	Pro Vice Chancellor
Bangladesh	Vice Chancellor	New Zealand	Dean
Hong Kong	Pro Vice Chancellor	Singapore	Dean
Hong Kong	Associate Dean	Sri Lanka	Vice Chancellor
Hong Kong	Dean	Thailand	Dean

Interviews, albeit a tool for eliciting rich data (Tamminen and Bennett 2017), are susceptible to the common problems of bias, poor recall or inaccurate articulation (Shankar and Goulding 2001; Smith and McGannon 2017). To protect the quality of evidence all participants responded in writing (by email), providing a more accurate rendition of each individual's accounts. As already eluded to, this approach had the added benefits of respecting the participants' seniority and time scarcity, while also enabling the expeditious completion of the fieldwork *during* the first wave of the pandemic.

3.4.1 Data Analysis

Data recorded in the email transcripts were inductively coded within a grounded theory framework (Glaser and Strauss 2017). Specifically, each email response was read repeatedly to gain a holistic understanding of the issues being discussed by respondents, and key concepts identified through this process were inductively coded to form categories. Iterative readings of the emails involved moving back and forth between the parts of the whole, searching for meaning, analytic patterns and emerging themes (Braun and Clarke 2006). These provided a basis for data immersion and analysis (Gadamer 2008). Following grounded theory's constant comparative method (Glaser and Strauss 2017), categories were then compared both within transcripts and across multiple transcripts in an iterative fashion to refine the definition and interpretation of each category and to ensure that the refined categories accurately reflected the original transcript data. Interesting features of the emails were manually
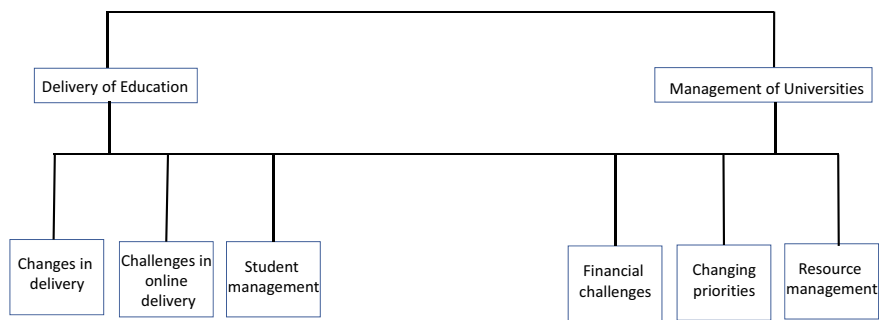
Fig. 3.1 Findings

coded in a 'systematic fashion across the data set' (Braun and Clarke 2006, p. 87). Moreover, given the possibility for country-specific practices to emerge, memos were prepared alongside the inductively coded categories to describe whether the experiences outlined by respondents were specific to their country or reflected broader sector practices. Software (such as NVivo) was not used. Multiple participants at different (but all senior) ranks in different countries enabled the capturing of diverse perspectives, which is an important means of building a ´dependable understanding' of the topic (Hirschman 1986, p. 246; Patton 2002). The research established credibility through a systematic approach to data collection and analysis. Documentation of the 'inquiry process' through memoing established a clear chain of evidence (Creswell and Miller 2000, p. 128; Silverman 2015). I reflexively probed presumptions and underlying perspectives in producing a new conception of the phenomena of interest. The chapter incorporates relevant illustrative quotations from interviewees. Each quote is coded with respect to the interviewees' position and country (Fig. 3.1).

3.5 The Delivery of Higher Education During and After the Pandemic

3.5.1 Changes in Delivery

The complex COVID situation provided considerable delivery challenges: the continued health risks of the pandemic made the pivot to fully online learning attractive and important, however an ongoing tension for some participants was that too high a level of online delivery would signal a permanent transition which for many was *not* the desired strategy of the university. It is also not seen as financially viable to run duplicate classes for online and face-to-face instruction. Therefore, if the experimental model were to run, it would require thorough evaluation. Student feedback is an important element in the constructing and evaluation of any new program.

Other participants were less dogmatic. The demand for *how* higher education is delivered will change dramatically. "*The majority of our offerings will shift from being face-to-face to being online or blended-a combination of face-to-face and online delivery*" (New Zealand PVC). These shifts will also create opportunities to educate students who previously may not have accessed higher education as the accessible online tools will have further reach in society.

Many universities are instituting what one Hong Kong Dean refers to as "1ˢᵗ generation" online programs. Lectures are pre-recorded (in small 15–20 min segments) and then delivered "live" or "synchronous" tutorials using a platform like Zoom or Webex. It is a reaction to the crisis, but "*hardly what we should be aspiring to for our online programs.*" The concern with online programs is that they are still largely based on the old lecture and tutorial model of university education. "*This in my opinion, is a mistake. The very same technology can be used to radically change the learning environment for students (and academic staff)*" (Australian Dean).

A Dean in Macau suggests that university education will become 'blended' including both degree programs and short courses. This will include research collaboration. According to another Australian Dean, the focus should be on moving away from lecture/tutorial format once and for all. "*Lectures are a bad, one-way mass medium. Like watching free-to-air television with a bad signal.*" Tutorials are still an option but with adaptations. The lecturer becomes a 'learning facilitator' who coordinates a team of five students working on a live brief from an actual external client who interacts with these teams. Teams could meet once a week for a period of 30-minute consultations (depending on the team's needs). The team will prepare a research report for the 'client' and present it to the client's executive team. The entire process can take place online. This approach encompasses many important personal growth, mentoring and 'real-life' business practices. An Australian PVC concurs with this strategy by stating that in the future, "*we will have to do much better than simply providing an online recording or a traditional lecture or PowerPoint slides with voice-over. Academics will need to spend time developing more engaging online programs with the assistance of learning designers. This is also true for assessment*". He argues that "*for the majority of discipline areas in business this is a great opportunity to switch to more 'authentic' assessment practices – a trend which was already strongly encouraged by the university.*"

Some leaders suggest that the pandemic has legitimized the online learning platform. "*In our case, the pandemic has made online learning more 'respectable' and brought it more into focus for faculty*" (Thailand Dean). It has highlighted the benefits of online learning and ensures that higher education will increase the digital component in the future. Learning will become more oriented to "stackable segments" whereby participants can receive "education which is primarily just-in-time not just-in-case." Others agree with this view, "*we will see greater integration of online and face to face delivery channels.*" (Singaporean Dean). One Australian VC does foresee some more permanent post-pandemic changes:

Large face to face lectures will be no more. The classroom will truly flip to replace the traditional lecture with online content and context, augmented through face to face seminars, tutorials, workshops and labs. The timetable will become freer and students will have more choice.

3.5.2 Challenges in Online Learning

Predictably, differences emerged between developing and developed countries. In Sri Lanka, like elsewhere, the pandemic has forced the adoption of online education. Where traditional teaching methods have been the most accepted and "comfortable" form of delivery and learning, the pandemic has challenged the system and 'forced' them to adapt. "*Our administrative functions too are in the process of digitalization. A once thorny discussion has now become readily accepted*" (Sri Lankan VC). Arguably, the challenge is heightened as the country does not have the necessary infrastructure to function smoothly online owing to student disparity and electrical shortages.

A VC in Bangladesh made note of similar circumstances and challenges. Switching from in person to online learning has not yet been adopted as a permanent method due to "*it's long-held socio-cultural perspectives and traditions of viewing face to face teaching methods as easily affordable and manageable.*" The uninterrupted availability of electricity is a concern. However, many students in the country were able to complete the semester with smart phone and mobile data. In light of the use of technology, the VC sees future generations adopting online methods as part of their education journey. "*The electronic device is going to be not just something nice-to-have but a must-have tool for their academic journey. In time, it will allow a wider range of the population to access education, particularly the multi-taskers,* "*mom-students and mom-teachers, which was a rarity prior to the pandemic.*"

An Indian VC notes how the 'new learning' has highlighted the importance of technology. "*Democratization of technology is now an important issue, comprising internet connectivity, telecom infrastructure, affordability of online system, availability of laptop/desktop, software, educational tools, online assessment tools* etc., *hence going ahead, the government will have to ensure last-mile connectivity to each of the 6,500 villages to ensure access to online teaching and e-resources.*"

At the other end of the 'digital divide', an Australian VC suggetsed that espousing 'online capabilities' and delivering online education are two entirely different realities—such that "*…the need for digital literacy retraining for established academics – and to be inculcated in the training of emerging academics is paramount*".

So online is challenging regardless of geography, but the challenges may vary between and within countries. Although online learning has been embraced to varying degrees by most/all institutions, and its benefits have been highlighted, there was also a renewed appreciation for classroom learning as expressed by the two highest-ranked schools in the study. "*Both faculty and students have a renewed appreciation for classroom learning*" (Deputy Dean, India). This argument is supported by a prestigious Singaporean school, whose Dean suggests that they are less likely to see

a surge of fully online delivery, "*because local employment factors might still favour some traditional learning models. But we will see universities complement their F2F with online and blended degree models.*" There will also need to be a rethink about how to do internships and short-term placements. "*This will require us to innovate on the principle of experiential and problem-based learning*" (Singaporean Dean).

3.5.3 Student Management

To address the rapid transition to an online teaching/learning mode, university leadership and IT teams adapted the academic semester to the new circumstances. However, most university leaders made note of the principal responsibility of ensuring the welfare of their students. This also included challenges for those universities with diverse student bodies. Ways had to be found for domestic and international students who could not return to their home countries. Graduating students also expressed their concern for future careers and internship opportunities. "*In such circumstances, it becomes imperative for university leaders to communicate in a manner that is reassuring and supportive*" (VC, India). As higher ed rankings agency Quacquarelli Symonds (2020) note, students have been dramatically impacted by the spread of the coronavirus, from travel restrictions to social distancing, isolation measures, quarantine, campus closures and border closures. And that doesn't even acknowledge financial hardship and insecurity.

Students have been challenged to adopt online learning as the health crisis has halted face-to-face learning and social gatherings. As a result, the learning environment is very different and challenging. Academic leaders recognize the disruption and challenge faced by students and note that student welfare is of paramount importance in navigating the 'new' learning landscape. Students need to become more *adaptable* and *resilient* and the university environment can assist them. As a VC (Bangladesh) notes, "*we rarely understand that young students' adaptability and resilience are being damaged globally mainly because of the attack of 'virtual virus', which has opened up the window of free access to social media, wasting valuable time view and sharing materials that have not use at all…the availability of appropriate online teaching methods during this kind of crisis situation can be one of the great ways to draw them to study, and help them reduce their vulnerability.*"

An Indian VC concurs with this sentiment, "*one of the most important and critical changes I see is to the way in which we prepare our students to adequately cope with the living and working environments they will go on to inhabit. In many ways, this crisis exemplifies the kind of challenges that our students are likely to encounter in their careers.*" Globalisation and higher levels of economic activity will present challenges for which there may not be predetermined responses. Graduates will be expected to adapt and respond to situations whilst encompassing diverse expectations of a community. "*In such environments, uncertainty, ambiguity, and complexity would be framing aspects…it now becomes (pro-COVID) imperative for higher education leaders to make these concepts foundational pillars for teaching and learning.*"

Learning to think creatively and develop broader perspectives about the dynamic nature of the contexts they are likely to live and work in.

Another student management challenge, particularly in the northern hemisphere, was managing the changing calendar. "*The biggest change for us to date is that we have moved our entry date for the 2020 cohort from our traditional April start (SE Asian New Year) to August start. Then we had to streamline the program to ensure 2021 graduation dates could be met. This will become the new normal for our programs.*" (Singaporean Dean). An Indian Deputy Dean pointed to the same process for their school. "*Our term normally starts in mid-April, but this year we extended it to start on June 1st, and that too only online for the first 10 weeks.*" As a result, the staff had to quickly upskill in teaching online. This had further implications, as staff adopted a 'flipped classroom' approach, "*using this as an opportunity to move the more mechanical learning online and use class time for those things that cannot be done well online, such as discussion.*"

3.6 Management of Universities

3.6.1 Financial Challenges

The health crisis has exposed the high dependence of universities, particularly in Australia, on international students. An Australian PVC argues that when international student revenues once again start to flow, they must be managed in a different way, "*used less for bolstering current expenditure and more for building endowment funds for the future…government funding will need to increase…a slimmer, more efficient sector is likely to emerge. After all, if much teaching can be done online, geographical factors lose their relevance.*" As a consequence, universities that offer high quality online programs will successfully compete against their less effective counterparts in other states and countries and profit accordingly. He further argues that "*it is highly likely that a period of extraordinary stability in the structure of Australian higher education, which has persisted since the late-1980s, is now at an end.*"

One Australian VC argues that, "*the key lesson is no debt and always have something saved for the rainy day.*" Diversification of revenue is of paramount importance going forward, while another expects a number of (Australian) institutions to face significant financial pressure, which will:

> *…see workforce adjustments over the next two to three years. I also expect to see tighter governmental regulation and self-imposed risk management and risk exposure assessments. I think it will be some time before we return to global mobility – if nothing else this event has demonstrated that conference calls are cheaper than air fares and hotel bills. I also expect to see deeper connection between established research collaborators – I believe that the disruption has brought more focus to inter-institutional research interactions. On the teaching front, we will see new models of international education, and increased embracing*

of e-learning and online content. This was the push the higher education world needed to fully step into the digital domain.

Education may become more local as students choose to stay local rather than travel abroad, particularly "*when the local universities are world class*" (Singapore Dean). He argues that university finances that have a high dependence on international student intake will come under scrutiny if students choose to stay local. This will also lead to changes in the hiring of faculty and tenure. Foreign students may also be denied visa issuance under the Covid-19 rules. As a result, this could reverse the trend of globalization in higher education. There will be rapid downsizing of the scale of operations for those universities that are highly dependent on the tuition of foreign students. A Hong Kong Dean argues that "*a big challenge for the universities is to justify the pre-pandemic tuition cost, if a lot of learning is conducted online*".

A NZ Dean warns that the university sector cannot afford to underestimate "*the threat of actual as well as potential competition from outside the* "*traditional*" *higher education sector, where organisations with mastery in exponential technologies, such as Google and Amazon, can make the global higher education market more contestable by delivering programs at a scale.*"

3.6.2   Changing Priorities

An Australian Dean is observing and experiencing financial pressure and trade-offs between teaching and research; not seeking perfect solutions at all costs and allowing for mistakes. Making incremental improvements, responding to feedback promptly and making corrections. Dealing with operational issues in the short-run and revisiting goals for the medium to long term.

Key lessons learnt from managing in the COVID-19 crisis also include, the flexibility of managing and leading under uncertain conditions, and the ability to pick vulnerable signals and take pro-active/pre-emptive actions. Furthermore, there should be periodic "*strategic audits*" to delete non-value adding activities, processes and programs. The emphasis should be on output and impact, rather than inputs. More attention should be paid to scenario planning. This will involve a greater empowerment of academic and professional staff which requires leadership to focus on staff well-being and professional development, whilst maintaining honest and clear communication. Leaders need to recognize the importance of connectedness and work with a "can do" mindset. It will be necessary to manage without "micro-monitoring." Management must guide the attitudes of students, staff and stakeholders towards remote delivery, the digitalization of operations and working from home. This could include on-line assessment.

A Hong Kong Associate Dean referenced the importance of having a broadly representative task force with many stakeholders and student representatives, to steer a university through a crisis that is constantly evolving. The importance of effective

leader communication is again emphasized, "*the importance of unifying communication to university stakeholders. Clear, non-conflicting and timely messages are important.*"

Indeed, an Australian VC views the new normal as being one *of* "*…almost constant scenario planning and strategizing – trying to predict markets and behaviours without a precedent for behaviours – and planning for worst case scenarios in terms of impact while trying to remain optimistic for some semblance of a return to 'business less unusual'. It's manifest in working-from-home and zoom meetings. The biggest change is the lack of physical connection to the university community and to the wider world*".

3.6.3   Resource Management

The pandemic has placed a spotlight on the university sector's primary resource—students (and staff). Higher education employees will have to upskill to meet the demands of a 'new-look' system. As the New Zealand PVC states, "*this will require a substantial investment in staff development.*" An Associate Dean (Hong Kong) suggests that monitoring mental health and wellbeing of faculty and students has become a part of the university's daily dialogue. "*I expect to see universities having health and wellness KPI's alongside the more conventional KPIs.*"

An Australian PVC has commented on the effectiveness of working at home, listing time -saved commuting and few distractions at home during meetings, as a personal benefit. However, he has also noted that for many of his female colleagues (with children requiring temporary home-schooling) the situation did prove challenging. However, platforms such as MS Teams have proved effective and virtual meetings will continue to be routine for the longer term. "*Previously, my university prided itself on being family friendly and offering flexible working conditions. The crisis has greatly accelerated those trends which are now entrenched.*" However, the PVC notes that not being in an office environment does reduce informal interactions which are very necessary to team cohesion and wellbeing. Whilst, "*a greater proportion of the working week spent at home will be the 'new normal,*" a balance must be struck, as working entirely online would not be ideal.

An Australian Dean notes that the online, working from home platform will result in the reduction of building programs. Fewer new office spaces will be required and universities can reduce building maintenance, cleaning and security costs. The investment in buildings will shift to investments in IT (New Zealand PVC). The need for travel will reduce—"*smarter ways of engagement will emerge resulting in less flying and in doing so contribute to reducing emissions.*" This argument could extend to less use of printing materials and more online resources having a positive impact on the environment. The concept of the "*Green University*" could be accelerated (VC, Bangladesh).

A NZ PVC concurs with this opinion on the role of the campus, highlighting the significant amount of money tied up in physical campuses. In non-semester times,

a campus is relatively under-utilised. "*Campuses will need to become vibrant and attractive destinations in their own right where people wish to live and play, as well as study, if they are to retain their relevance in the post-COVID world.*" A VC (Bangladesh) notes that online tasks will include organizing events such as orientation and festivals, encouraging the campus environment to maintain its vibrancy. He does recognize that it is difficult to tell "*whether the actors in such online gatherings will fully enjoy their virtual happy hours.*"

3.7 Discussion

The ability to pivot to online learning during the pandemic was largely appreciated by the university leaders, but it uncovered a wide and diverse range of views with regard the post pandemic ongoing role of online. Indeed, a full spectrum exists. At one end, the converts and zealots, who feel that how higher education is delivered will change dramatically (and permanently) and that the majority of all offerings will shift from face-to-face to online or 'blended' (i.e. a combination of face-to-face and online delivery). These shifts will also create opportunities to educate students who previously may not have accessed higher education as the accessible online platforms will have increased reach in society. Some leaders were even more aspirational, looking beyond emergency online teaching to 'radically change the learning environment for students (and academic staff)'. Indeed, to move the focus away from traditional lecture/tutorial format 'once and for all'.

Most/all leaders acknowledged that the pandemic has legitimized online learning and made it 'more 'respectable'. It has highlighted the benefits of online learning and ensured that higher education will become increasingly digital in the future. Learning will become more oriented to 'stackable segments' and education which is 'primarily just-in-time not just-in-case.' Indeed, there was much support for university education becoming more 'blended' including both degree programs and short courses. In the middle of the spectrum where those who worried that too high a level of online delivery will signal a permanent transition which for many was *not* the desired strategy of the university. While others worried about costs and duplication of online and offline.

At the other extreme were those who longed for a return to the classroom and away from online. Indeed, some reported a 'renewed appreciation for classroom learning'. It seems higher ranked schools are less likely to make a hard transition to fully online delivery. Indeed, their models are predicated on low volume, high margin, high touch and non-scalable delivery. They seek to provide a premium experience for the privileged (and talented) few and price accordingly.

In some of the developing (sub-continent) markets, the pandemic 'forced the adoption of online education'. Where traditional teaching methods have been the most accepted and "comfortable" form of delivery and learning, the pandemic has challenged the system and 'forced' them to adapt. This led to other challenges, such

as the lack of necessary infrastructure and a digital divide owing to 'student disparity and electrical shortages.'

Indeed, '*democratization of technology*' (internet connectivity, telecom infrastructure, affordability of online system, availability of laptop/desktop, software, educational tools, online assessment tools) remains a hurdle, as does 'last-mile connectivity' to thousands of villages to ensure access to online teaching.

On the upside, many rural students in the country were able to complete the semester with smart phone and mobile data. Indeed, mobile devices could become 'must-have' (as opposed to nice-to-have), which could increase access to and participation in education for many.

From a students' perspective, the pandemic learning environment is very different and challenging, calling for adaptability and resilience. However, in crisis lies opportunity, in this case, preparing students to cope with the living and working environments they will go on to inhabit.

The pandemic has exposed the high dependence of universities, particularly in Australia/NZ, on international students, leading many to call for reform and lasting change. More prestigious institutions in Asia suggest (hope?) higher education will become more local as students choose to stay local rather than travel abroad, particularly 'when the local universities are world class'. University finances that have a high dependence on international student intakes will come under increased scrutiny if students choose to stay local—almost a globalization paradox in higher education. There will be rapid downsizing of the scale of operations for those universities that are highly dependent on foreign student tuition, which for some will make it difficult to justify their pre-pandemic tuition cost.

Australian schools are experiencing severe short-medium term financial pressure and are having to make trade-offs to deal with operational issues in the short-run and revisiting goals for the medium to long term.

The pandemic has placed a spotlight on the university sector's primary resource—students and staff. Higher education employees will have to upskill to meet the demands of a 'new-look' system. This will require significant investment in staff development.

The online, working from home platform will result in a reduction of campus building programs. Fewer new offices will be required and universities can begin to reduce building maintenance, cleaning and security costs. The investment in buildings will shift to investments in IT. The need for travel will reduce, resulting in reduced emissions, accelerating environmental sustainability and reform.

3.8   Conclusion

Disruption is coming for higher education. Even the best universities are going to have to change rapidly. Otherwise, they're going to be overtaken rapidly (Christensen 2013). Previously, when higher education institutions thought of digital transformation it was to achieve greater access, global reach, personalised instruction and

rapid improvements in pedagogical practices. Now, with no on campus students for extended periods, risk mitigation will become an equally important driver of digital transformation—both now and into the future (DeVaney et al. 2020).

COVID-19 represents a once-in-a-generation opportunity for the sector. Turning the crisis into an opportunity will require a degree of change at the institutional level—breakups, mergers and closures of faculties—that few will want to embark on until it is too late. And it will require a significant change in what are considered the "job requirements" for university leadership (Devinney and Dowling 2020).

> *I was torn between stating what I thought would happen versus what I hoped would happen post Covid-19. Alas, I fear the two will not be the same.* (Australian Dean)

Arguably, COVID-19 should/could be a catalyst for change, but that does not guarantee it will happen. As one PVC states, "*needless to add, none of this rapid development or large-scale experimentation would have occurred but for COVID-19.*" The pandemic has awakened and enabled opportunities for exploration and change around teaching/learning innovation. But is it enough? Will the sector reinvent itself, or wait for the dust to settle and then revert back to the ways of the past? Certainly, there is still something of a disconnect between how the study participants view the future compared with external experts, consultants and commentators—with the former being far more circumspect and conservative; and the latter more doomsday-like.

For example, the VC of one of the Australian universities most affected by the collapse of international students (and hence of on the most over-dependent) is not only unrepentant, saying that they had "not been irresponsible in depending on Chinese students", but also highly confident that "*..the market for international education, post-pandemic, would* "*continue to grow exponentially this century and Australia has a real edge competitively compared to any other country in the world*" (Hunter 2020). Time will tell.

Appendix A

Interview Protocol
Dear XXX

How are you travelling—in these strange times?
Can I ask you a favour? I teach in the education faculty at XXX and am preparing a book chapter on COVID-19 and the Future of the Service Industry Post-Pandemic. My chapter focuses on **the future of higher education/universities post COVID-19.**

- As a senior academic leader, in your opinion, what will the *new higher education world* look like once the proverbial dust settles?
- What is *your* "New Normal" and how are you coping with it?
- What key lessons have *you* learned during this pandemic (that could assist future academic leaders deal with similar crises)?

- What aspects of your institution and operation will **<u>not</u>** go back to the way things were pre COVID? In other words, what permanent changes do you anticipate?

The study is **completely anonymous and deidentified**. At no point will you be named or your identity revealed—other than a very broad descriptor like "Australian vice chancellor' or 'Singaporean Dean' (no mention of discipline).
The book editors are keen to publish this year—so deadlines are tight. Hence, if it is not too much trouble, could you reply within a week?
Enjoy your weekend!

XXXX

Author's Insight

The pandemic has facilitated an expedited learning curve in terms of online delivery, in both developed and emerging economies. Many schools seemed to make up 5 years' worth of ground in 5 weeks—albeit often out of necessity rather than choice. Some universities with significant prior online expertise were adapting, whereas others faced far more significant challenges. The online environment does provide opportunities for more engaging practice. For example, a more problem-based curriculum, with students being involved in 'real-life', mentored projects. This develops student creativity, adaptability and very importantly, resilience. Assessment formats and protocols also required creative re-thinking. The pandemic did expose some (Australasian) schools' financial over-dependence on international student fee income. That said, when all is said and done, the twenty participants interviewed in this study did not point to any radical or particularly enduring structural reforms. For example, no changes to degree duration or credit hours emerged in the responses. No real competitve threats (or opportunities) were identified either. Even the most prestigious schools did not speak of being free of the bonds of geography and using online capabilities to attract the brightest students from around the world. Rather, they seemed more content to return to their pre-COVID status quo. While COVID-19 might theoretically represent a 'once-in-a-generation' opportunity for the higher education sector, turning the crisis into an opportunity will require a degree of change at the institutional level that most of the leaders in *this* study seem somewhat reluctant to embrace. Hence, based on the findings of the present study, one might conclude that changes will likely be evolutionary not revolutionary; and innovation incremental rather than disruptive. It could well be that this sector does 'waste a good crisis'. The only caveat to this is that the fieldwork for this study was conducted in April 2020, early in the pandemic. Hence, many of the participants would have been more focused on survival and short-term 'fire-fighting' rather than seeking out longer-term opportunities. That said, higher education is one of the oldest continuously operating sectors in the world and has survived many pandemics and crises far more calamitous than virus strain SARS-CoV-2 (named 2019-nCoV or COVID-19). Contrary to the cliché, perhaps change is *not* the only constant?

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