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UNSW is a serious player in international education: Ian Jacobs.

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With the demand for higher education booming worldwide, particularly in China and India, will universities be able to satisfy demand? And can Australia become a serious player in this expanding field?

Our international education industry keeps expanding, which is good news for many Australian universities and the economy generally. Recent figures show an industry worth over \$20 billion annually. Last year, more than 300,000 higher education students were enrolled here, up nearly 13 per cent on 2015. According to the OECD, the number of students travelling internationally for education in 1990 was 1.3 million, and in 2010 it was 4.1 million; by 2025 that figure is expected to reach 8 million. Higher education worldwide is booming and the demand for high quality education is increasing rapidly.

In addition, as federal education minister Simon Birmingham has observed, "various geopolitical factors" are creating new possibilities for Australia – no doubt a reference to Brexit in the UK and Donald Trump's election as US president. Currently, the US and the UK are first and second in the league table of visiting international students, hosting almost 30 per cent of more than 4 million globally. Australia, in third place, is well placed to draw more students from that group. The 2016 International Student Survey indicated the three main reasons why international students chose to study in Australia were the reputation of Australian qualifications, the reputation of the Australian education system as a whole and personal safety and security.

How can Australia build upon this in a world of increasing uncertainty? It requires taking a calculated guess at what the world might look like in, say, 2040.

One likely development is that the sum of all available information will be digitised, making it available online. Advances in artificial intelligence mean that many traditional jobs will be performed by computers or robots, and universities will need to provide their graduates with the capabilities needed for a radically changed workplace and society. The paradigm of set degrees, with a fixed curriculum over a fixed period of study, will be a far less dominant feature of higher education – an uncomfortable prospect for those of us who have shaped careers on the foundation of a degree program! The new employment market will require

continuing micro-courses on subjects currently unknown to us. In that sense, 'graduates' will never stop being students.

Digitisation and globalisation will be central to this revolution, as will new and radical technologies, now at early stages of development, which many Australian universities are already taking up. Those that fail to embrace these changes may have difficulty catching up. My university aims to be at the forefront of these developments.

We believe digitisation can improve the way knowledge and information are presented, understood and learned, while providing greater flexibility, personalisation and interactive learning. Last year we offered students more than 2000 adaptive-learning lessons in 107 separate courses. These so-called 'smart' lessons take into account how quickly individual students learn and allow them to move through lessons at their own pace. We are designing the world's first online degree that is entirely adaptive and responds to the individual learning pace of each student. In parallel, we are investing \$75 million in the next five years in a bold redesign of over 600 of our large student cohort courses, based on the intelligent use of technology. UNSW, like other tertiary institutions, is exploring a wide range of digital options.

To some, these developments will be anathema; to others, a cause for anxiety; and to others still, an enormously exciting opportunity. In truth, nobody can say with certainty where this will take us, what issues will arise, and how we will fare over the next 20 years. One big challenge is how to retain and convey inspiration in teaching across digital mediums. We can set up elaborate online platforms and inject millions into moving course content from the lecture theatre to the screen, but perhaps our biggest challenge will be ensuring the great art of teaching – inspiration – does not get lost along the way.

Alongside this sits the reality of globalisation of higher education. If the impacts in other sectors are any guide, waiting to see what happens rather than seeking out global partners could spell oblivion. At UNSW last year, we launched the tri-nation PLuS Alliance partnership with Arizona State University and King's College London (PLuS being for Phoenix, London and Sydney) with the intention of pooling courses and resources in the decades ahead. Our new alliance already offers seven online course exchanges between the three institutions, and in coming years this will expand rapidly. Arizona State's own online Global Freshman Academy has already attracted 200,000 students in 186 countries – the beneficial merger of globalisation and digitisation in the service of humanity.

Does such consolidation and amalgamation, likely to widen in the decades ahead, mean universities will not survive as unique, independent, geographically focused entities? Once there were dozens of automobile companies, now there are five or six majors. Once there were dozens of international airlines, and now, with consolidation, we are heading towards only a handful of players. Will we end up with the 'Big 20' mega-universities, or even the 'Big 5'? Or will universities continue to cling to their institutional independence as fiercely as they do to their academic and intellectual freedoms?

I predict that over the next three decades a small number of high quality, high brand universities, or conglomerates of universities, will come to dominate a globalised market for higher education, producing and controlling a massive output of digital learning content in a highly competitive domain, making higher education more accessible for all regardless of location. These 'global universities' will offer high quality, lifelong education with prestigious credentials ranging from entirely digital/online learning, through blended learning with some time on campus, to a more traditional residential or on-campus experience. Using the PLuS Alliance as an example, a student in Delhi, Kampala or Beijing would be able to design their own combination of both remote learning and overseas education travel to Phoenix, London or Sydney.

I think there will still be a place for localised, culturally specific modules. Niche markets will appear for those, at a range of prices, offering quality face-to-face interactions and a human experience that no computer can provide, plus real, hands-on workplace experiences that online teaching cannot provide.

As we advance deeper into the online world, there is likely to be less and less reason to travel abroad to study. Like the mining boom that preceded it, Australia's current boom in international students, welcome as it is, is not guaranteed to continue. The sector needs to adopt new technologies and embrace the global pool of expertise and collaboration so that we remain major providers in global education regardless of the emerging balance between campus-based and online education. Arguably, the strength of Australian higher education on the global stage has never been greater. We have a fantastic foundation to build on.

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