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# AUSTRALIAN UNIVERSITIES: THRIVING IN A CHANGING WORLD?

Ryan Young



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## About the author

Dr Ryan Young is the Director, NSC Futures Hub.

He leads work on how to integrate analysis of long-term trends and potential futures into effective everyday policy making.

Prior to the NSC he spent almost 5 years in strategic policy in the Department of the Prime Minister and Cabinet (PM&C) where he worked across all areas of public policy, including cyber security, counter terrorism policy, infrastructure, innovation, school funding and early childhood education.

He has worked across multiple Departments in the Australian Public Service and has held Visiting Fellow and/or teaching positions at the University of Leipzig, Germany, the Australian

National University and the University of Canberra. Ryan has a PhD in philosophy and logic from the Australian National University.

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## EXECUTIVE SUMMARY – PREPARING FOR THE WORLD TO COME

University sectors in Australia and across the world are facing an inflection point in their future trajectories. The COVID-19 pandemic has undermined business models built on international student income, radically changed the student experience and upended norms of academic behaviour – particularly around conferences and travel.

To help tackle questions around how universities can decide on robust strategies in this context, we explored a range of trends and issues in the university sector, and project possible pathways out to 2028, to understand the likely directions of change in the sector. These trends and issues coalesced into a number of challenge scenarios to test potential strategies against, and to identify likely successful approaches.

The main finding of this work, that the Australian university sector will likely look very different in 2028, is less surprising than the reasons. While the COVID-19 pandemic and associated travel restrictions has triggered an immediate crisis that will drive ongoing change, the most important factor is a technology-triggered shift over the past few decades in the perceived value universities bring to our society.

In the world in which most Australian universities were founded – and notably the norms and incentives that drive much of their behaviour – systematic research was scarce and access to cutting-edge information was very limited in Australia. Universities provided significant societal value both through research and knowledge generation but also by facilitating far greater knowledge transmission into Australia. Put most simply, the internet and the globalisation of the research sector has fundamentally changed this model. Global funding for research has exploded across all sectors and there are now practically no technical barriers to accessing knowledge from anywhere in the globe.

The critical challenge today across all sectors is not finding or generating knowledge, but making sense of the vast amount of knowledge that we can all access. The societal value that universities can bring is therefore shifting in the same direction. This structural shift in the nature of our societies is already being reflected in changing priorities for funding universities, both from public and private sources.

Successful universities, measured both by delivering societal value and their balance sheet, will need to adapt and in many cases shift the balance of internal activities and priorities.

The amount of funding available for fundamental knowledge generation or universities as independent producers of knowledge will shrink – both as a result of the shrinking international student pool and funding priorities from governments and the private sector. Funding to work in partnership across sectors to help people make sense of and apply research and expertise will likely increase.

Expectations on higher education are shifting similarly. People and organisations will increasingly want help to understand, think about and assess the information they can access on their phone or computer. A rewarding future student experience will focus more on training people how to think clearly and equipping them with the right skills, rather than teaching them lots of information.

Universities, and particularly research intensive universities, will be faced with a stark choice. They can continue to primarily focus on their traditional roles – at a far reduced size and scale. Or they can embrace the societal demand for partnership and co-design, which will (in many cases) require a significant rebalancing of priorities, people and skills.

There will be a temptation to simply add ‘co-design’ to the ever growing list of performance criteria for academics and researchers. However, experience suggests that it may be more effective to invest in hybrid or boundary teams in the university to focus on this work. Partnerships across sectors, public influence and co-design require distinct skills and experience that few academics currently possess and are often best sourced elsewhere.

This tension points to a broader structural issue. The Australian university sector is largely homogeneous with the majority of universities adhering to a similar model – encouraged by market dynamics as well as regulation and funding bodies. For a range of reasons, including budget difficulties, international competition and societal demand within Australia, we expect this homogeneity to be untenable and universities will need to increasingly define their own unique place within the national and global sector.

This report recommends three high-level strategies that universities should consider as a way of setting themselves up for future success. As high-level strategies for a whole sector, these necessarily read rather a lot like a collection of buzzwords. Chapter 2 of the report contains a range of ideas about how to flesh these out into more concrete strategies.

**Recommendation 1:** *To thrive in the 21<sup>st</sup> century, universities need to, at a minimum, get the technology and digital platforms right (including the work practices to make full use of them) and re-examine what a university education should provide today given societal changes.*

Getting the technology and digital platforms right – so they are easy to use, robust, scalable and deliver whatever they are needed for is an obvious baseline for any successful organisation today. It is equally important that all staff – perhaps especially academics – learn how to make best use of the platforms.

Success in the 21<sup>st</sup> century also raises serious questions about what a university education should be today – are traditional degrees still completely relevant and, if so, in what form? This wasn't just a discussion about STEM subjects, as it often is, but was focused more on the balances between, for example, critical thinking and knowledge, theory and practice, and skills compared to social conscience. The broader information environment has changed dramatically but higher education may not have shifted sufficiently in response.

**Recommendation 2:** *To navigate the shift in societal values, universities need to shift its balance of effort more towards collaboration, partnerships, interdisciplinary work and helping others in society make sense of the information already out there.*

A common theme through the project work was a call for a mindset change in universities. This does not mean they should think more like businesses or other sectors, but design new ways of thinking and new narratives that recognise that their place in broader societal and economic systems has changed.

The societal value of academics and universities as independent knowledge generators has decreased yet the self-assessed importance of this work within universities has not shifted. While there is still significant value in this approach, the balance of it across universities and the ways of achieving it do need to shift if universities intend to continue to deliver real societal value. There are many ideas on how to achieve this, with the common themes being collaboration, partnerships, convening, better connections to those in the community and outside and rewarding these approaches internally.

**Recommendation 3:** *Achieving any of these changes requires universities to improve internal structures and incentives to enable new ways of working and integrate the continued core strengths of universities with expectations and needs in the 2020s.*

Common feedback in discussions about encouraging universities to shift in the directions outlined here was that researchers and other university staff do not have many real incentives to genuinely work differently and collaboratively. In fact, many of the incentives (explicit and implicit), cultural norms and decision making processes actively discourage researchers from this. The issues span a spectrum from local work cultures, performance evaluation and employment arrangements, through university executive priorities, all the way up to grant funding rules, regulations on and evaluations of universities and international rankings.

One potential long term issue that traditional international academic norms that universities and government often rely on for measures of quality, such as peer review, are under pressure and are shifting. This may shift responsibility for quality management and assurance back onto universities in a different way in the future.

System and organisational structures, and the individual incentives these drive, were largely set in a previous century and were considered to hold the university back in many ways, rather than help it succeed. This wasn't a call to run universities more like businesses, but rather think about how to run a university well in the modern world.

The report sets out the findings of the different stages of the project. The first chapter takes a short historical look at how the world has changed since many Australian universities were founded – with the ANU as a case study – to add further context to the two challenges set out above. Chapter 2 sets out the suggested strategies identified by participants, and so expands on the details here.

Chapters 3 and 4 outline the views of 2028 from the diverse group of people involved in the first phases of the project. Chapter 3 summarises the outcomes of a Delphi survey that over 50 experts from across the university sector and beyond. Chapter 4 includes the challenge scenarios, synthesised from the survey, that were used to test ideas about how universities can robustly prepare for the future.

## CHAPTER 1. AUSTRALIAN UNIVERSITIES IN THE WORLD: THE POST-WAR PERIOD VERSUS THE 2020s

Australian universities – and the research sector more broadly – expanded massively after the Second World War with a wide range of benefits for the nation. It is a truism to say that the world, and universities, have changed profoundly since the post-war period, however it is easy to underestimate the depths of some of the changes and their implications.

To explain some of the changes, we will use ANU as a case study. It was established immediately after the War and is in some ways emblematic of the great increases of Government support for universities during that period. The lessons drawn apply equally to all universities and particularly to structural and cultural features of the Australian university sector.

ANU was established by the Federal Parliament in 1946 as a national building project following the Second World War. World class research, thinking and expertise were to play an important role in rebuilding the country and there was limited access to these within Australia in the 1940s. There were only six universities (and two university colleges) in Australia and these were small and fairly parochial by current standards. By way of reference, combined student numbers in the entire sector was around 14,000 across the entire sector prior to Second World War (from a population of about 7 million).

The small size of the university sector, and associated expert communities, was a major issue for an ambitious country that was hungry for expertise and information. In the 1940s, international travel took weeks and months while any serious form of international communication had to be done by letter. Access to the information and research that a country like Australia wanted and needed was difficult, limited and cumbersome. As a country, we faced significant information scarcity – at least compared to other leading Western nations.

Small local universities and the scarcity of information inhibited Australia's ability to educate and train people in high end research, analysis and scientific skills. And the ability to conduct world leading research and, of particular nation-building importance, research into Australian focused problems and issues was slight.

In this context, greatly increasing support for universities – including establishing a new university with a national mandate – delivered rapid, tangible returns. The expanded universities attracted a range of world-leading experts on a range of topics, improved education and training opportunities, and

helped create a local critical mass of academic thinking and research. All of this dramatically dropped the barriers for Australians to access cutting edge thinking.

Where access to the world leading experts was very difficult due to distance, locally based researchers were able to provide insight and evidence from those experts. Well managed university libraries, and academics who were paid partly to keep on top of the latest research in their field, were a highly efficient and cost-effective way for governments and businesses to stay abreast with the latest research and knowledge.

While slowly undermined with a range of technological advancements from the 1950s onwards (commercial airlines, international telephones, TVs, fax machines etc), this world where research and information was hard to access and required dedicated human capital and infrastructure persisted for decades. However, computing and the internet has utterly changed the information environment.

Today, in 2020, we are struggling with information and research abundance, rather than scarcity. Around 3 million academic papers are published every year and each one of us can access them all from our desk or pocket, as long as we have internet access, a subscription and possibly a credit card. It is often easier, particularly as many of us are working from home due to the pandemic, to talk to and collaborate with an expert on the other side of the world, than it is to talk to someone who works in the same city, university or business.

Within Australia, there are now 41 local universities plus a couple of international universities operating in some form within Australia. There are now about 1.5 million people enrolled at a university, with over 1 million domestic students. As a proportion of population, there are 20 times as many university students now, compared to the 1940s. All of these universities are focused on research as well as teaching – a vastly different sector and environment to the post-War period. In addition, there are also a vast number of competitor education and training options available via online platforms, some are free, some are cheap and some are good quality.

On top of this, the global research sector has changed profoundly. The number of universities producing world class research has exploded both within countries and particularly across more

countries. There are far greater resources invested in research across the globe and the cutting edge of research has been pushed out a long way since the 1940s. Many research projects are highly complex, global collaborations.

This growth has brought huge benefits, but it is important to remember that the benefits and value provided by universities have necessarily shifted with the changes. A university that operates as part of a very small, niche sector, in an information scarce environment brings a very different value to one within a larger sector, with many competitors (locally and globally) and within a world of information abundance.

To illustrate one aspect of this, let us consider the relationship between ANU and the Australian Public Service (APS) in the 1960s and 1970s as a case study. If a public servant working in Canberra wanted to consult the academic literature or latest research on a policy issue, the most practical and efficient way for them to do so was typically through ANU academics or resources. It was much easier to go to ANU to find out what the latest research was worldwide than try to access it directly. ANU was an important and accessible source of information to the APS just by employing quality academics and collecting academic resources – even if not always used in practice.

The situation today is profoundly different. The easiest option for a comparable public servant today is to do desktop internet research. This will likely reveal a range of useful material, some academic and some done by other groups like think tanks or consultancies. If the public servant wants more (and has the time), they will normally identify particular experts they think can help them and get in touch with them personally. ANU is only considered as an option if the relevant expert happens to be at ANU. Even then, they are not really going to the expert as a source of knowledge – they can already find out most of the relevant facts and information online – but to assist with testing ideas, judgement and providing different context or perspectives.

In our world of information abundance, people look to experts and universities for help in making sense of what they are reading and seeing, and how to think about it constructively and then be able to act usefully. People don't look to experts nearly as often just to find out information or knowledge – and where they do, they are looking for local or contextual information that isn't available. These same dynamics will also drive expectations of, and demand for, different types of education.

The challenge for universities is to understand and provide genuine societal and human value within a vastly different information context, without losing the distinctive ethos and values that have made them an enduring and valued institution for centuries.



## CHAPTER 2. UNIVERSITY STRATEGY IDEAS: RESPONDING TO SCENARIOS

To inform decision making and priorities about the future directions of universities, the 'Future University' project ran a series of three online workshops that considered three alternative scenarios about the future of the university sector in 2028. The aim of the workshops was to consider the challenges and opportunities for universities across all the scenarios and identify possible actions or priorities to help it thrive over the next eight years. Notably, the direct impacts of COVID-19 and potential mitigations was a background constant as the consensus view was that the pandemic will trigger or accelerate broader changes to the sector. The assumed baseline impact of the pandemic was tighter budgets and fewer international students over the next eight years.

The workshop discussions were diverse with a range of thought provoking comments, divergent views and some bold suggestions. The discussions broadly coalesced around four themes, which are explained in some detail below:

- Thriving in the 21<sup>st</sup> century
- A mindset change for the university sector
- University identities and specialisations
- Internal legacy structures, processes and incentives

### Thriving in the 21<sup>st</sup> century

The 21<sup>st</sup> century has seen profound changes to how knowledge is produced, accessed and absorbed across the globe, most notably through online access and the globalisation of knowledge production. The pandemic is, so far, accelerating these changes and their impacts on the way people live and work.

Given universities are in the 'knowledge business' in many different ways, these broader changes are deeply relevant to the ways universities and academics can work and succeed – on any measures of success. Already, the ease of real-time global collaboration and access to global research has transformed the way academics and universities work and what they can do. However, the broad consensus was that further changes are likely needed for universities to thrive into the future, especially given budgets will be very tight.

The first, and obvious, non-negotiable change is for universities to get digital delivery and platforms right. The immediate challenge for 2020 has been digital learning, but this is vital across the full spectrum of university activities. A global digital world opens up

many opportunities for outreach, impact and collaboration, but these can only be fully grasped if the underlying technology works well and we know how to make best use of it.

There are mixed views on the extent to which the current expansion of digital learning will be permanent but it will continue and will remain an important, and visible, element of university activities. Doing it well is critical for brand success but also for staff and teaching effectiveness. This includes getting the right technology and platforms working, widespread training in the mechanics and options of those platforms and broader education and lessons in how to make the best use of the technology. Universities have generations of inherited wisdom about how to teach and collaborate effectively in a traditional environment. This does not always translate to an online environment and all staff need to learn how to work well in the digital environment.

In the broader context, there were a range of suggestions that universities need to 're-conceptualise the Degree'. In a world where information, including advanced research, is ubiquitous and easily available, the value and benefits of a degree are necessarily different to what they were when information was harder to access. What then is the value of a degree? Not just for the students, but also the community, employers, the nation?

The value of degrees is often explained through a range of factors such as knowledge, skills, social mobility/equity, ability to think critically, networks, human capital and community. The general view was that these are all still relevant, but the mix and relative priorities need to shift. As these shift, so should the design, structure and pedagogy of university degrees. When major knowledge companies like Google no longer require degrees for employees and are actively recruiting outside of university environments, universities need to consider the value of what and how they are teaching.

A clear interest in the discussion was the potential for universities to offer short courses, executive education and micro-credentials. These were considered to be increasingly valuable to students, businesses and employers – particularly given the 21<sup>st</sup> century pace of technological change.

The most common public narrative about how university education needs to change, which is often reflected in government policies, is that there has to

be a greater emphasis on STEM graduates and subjects. The discussion of the scenarios questioned this approach in a few different ways.

The first was to argue that, in a world of abundant conflicting information and where the big problems to tackle are complex and inter-disciplinary, critical thinking skills are more valuable than ever. What we, as universities, organisations and societies, need most of all are people who can critically evaluate research and information and make sense of complexity – science literacy is an important component but not everything.

A second point was the observation that many younger people today have a strong social conscience and care about making the world better. The expectation is that this will only intensify after their experience of the pandemic. Providing students with a meaningful and valuable university degree needs to take into account these motivations.

A third point was the view that it is increasingly important to connect students and researchers more closely with what are thought of as technical or practical skills. Change in society happens best with a fusion of the theoretical and tangible, where research or theory is manifest in and shaped by making things or delivering results. This fusion is often most meaningful to people personally, but also brings together a broader diversity of genuine skills to tackle the complexity we face in our world and solve the important problems.

One other consistent aspect to the 21<sup>st</sup> century has been the way that business models and organisational practices have been radically upended across society. Medicine, media, retail, and law are only some of the sectors that look and operate very differently today compared to 25 years ago. Universities, on the other hand, look really quite similar to previous centuries – aside from huge growth in students and digitisation of some activities. The changes to ways of working were less clear, but it is expected there will be an efficiency push for universities to be cheaper to operate – similar to other sectors – particularly with very tight future budgets.

### **A mindset change**

Universities, and academics, have typically thought of themselves as independent producers of knowledge, insight or expertise who function best when they are given autonomy to do their own work. While there are many strengths to this mindset, a constant theme to the discussions was that it is no longer viable, due to societal expectations and

funding opportunities, and is often now counter-productive.

Instead, universities and academics can offer the most value to society and be more productive by operating as part of collaborative networks and teams that span multiple universities and sectors. Businesses, governments and citizens are far more interested in co-design and working together in partnership arrangements today – and funding arrangements will increasingly reflect this. A major driver of this trend is the inter-connectedness and complexity of the issues that are front of mind for many now and into the future. The pandemic is a very good example as an effective societal response requires the integration of expertise from (at a minimum) epidemiology/health, economics, societal behaviour and psychology, law enforcement, and media.

To put it differently, as one participant phrased it, trends are breaking things apart and someone needs to try to put them back together. This is one valuable social role that universities could help play.

However, while the value that society is looking for from universities, and therefore funding for different types of activities, is shifting, universities need to think carefully about the right balance of activities. Universities have long pursued foundational knowledge generation as a core value and goal. Abandoning these activities would be to everyone's detriment. The balance and priority to different types of activities, and the ways of working to achieve them, will necessarily shift over time.

The fortunes of the Australian university sector in 2020, and the lack of vocal community support, should be a wake-up call that demonstrates a clear gap between what society broadly thinks and expects of universities and what universities have been doing.

To make the most of their unique strengths and skills, universities and academics will have to think of themselves less as the source of knowledge and expertise, and more as curators or convenors of a diverse set of expertise and skills. This does not mean that deep expertise will no longer matter, but rather that universities can add significant benefits to society by both cultivating specialised knowledge and effectively bringing the range of expertise together to illuminate and tackle complex problems.

This dynamic holds both for research and for teaching. One common sentiment in the workshops was to question why students are forced to listen to a local academic teach a subject that may not be their speciality when they can probably find lectures by world experts on the same topic online. The

educational mindset change would be for course convenors to focus on curating the best material and expertise they can into a powerful educational experience, rather than focus of themselves as the source of knowledge for any subject.

There are a wide range of activities a university could pursue that would help make this mindset change concrete – and deliver tangible, understood societal benefits. These would require a number of changes in priorities and practices, most of which involve expanding on what is currently done rather than completely new activities. Participants came up with many ideas on how to achieve this, including:

- Greater work through partnerships and consortia – across universities globally and across sectors. These would need to be institutionally embedded and not just left to individual academics. These could be for research, but also teaching, such as joint degrees with other universities. The aim would be to find partnerships of genuine value and/or that bring something distinctive compared to what already exists.
- A far stronger demand-driven or outside-in view of all university activities – start with what the groups we are working for need or think is important and design education, research priorities and work practices from there, rather than start by thinking about what we can offer.
- Investment in teams within the university that work effectively at the boundaries of traditional academic expertise and can effectively convene and curate teams across the university and beyond. There is a different set of skills and priorities for this work and it is unrealistic and counter-productive to expect most academics to succeed at this work by themselves.
- Greater emphasis and support for inter-disciplinary (or even ‘anti-disciplinary’) research and teaching to tackle the complex problems of today. For example, a researcher in astronomy pointed out that most of the cutting edge problems around space today involve legal, ethical, security, political and medical issues, not just astronomical topics.
- Create more concrete pathways into work or further opportunities for students – whether it be with businesses, community organisations, volunteering or the public service.
- Consider ways of involving the public or interested people as part of university work, rather than (at the worst) looking down on

them as insufficiently enlightened. This can include a real focus on working with and supporting community organisations – who need help and expertise and can offer great value to our society but also research in many areas.

- A different approach to academic publishing, some of which has been accelerated by the pandemic, where the focus is on providing robust and meaningful results quickly to those who are interested or would benefit from it, rather than a focus on achieving academic prestige.
- Recruitment of and rewards for staff who engage in inter-disciplinary and external collaboration, rather than a traditional academic rewards structure that only prioritises narrow academic specialisation.
- Create opportunities, or at least make it easier for academics to do sideways secondments or teach into very different parts of the university, as a way of making the type of mindset change practical.
- A greater mix of the theoretical and research with the practical applied skills, by bringing more practitioners into the classroom to complement academic teaching. This could be further backed by a greater number and range of internships.

This is a long and diverse list, and not all of them are easily achievable. The list does point to the diversity and range of opportunities to change the way the university operates and thinks of itself. It is noteworthy that none of these would force all academics to work in the same way or all to work differently for the new world.

A couple of other mindset related observations from participants were that universities tend to be too complacent about their place in the broader sector and environment. They tend to react to changes rather than try to be proactive and get ahead of what might happen. A second observation is that universities do great research on decision making, management, social psychology and other fields, but rarely manage to apply the insights from their own research to how they run themselves.

### University identities and specialisations

Australian universities in 2019, and the university sector as a whole, are vastly different to a university in the 1950s or 1960s. One obvious difference is that universities are now many times larger and run many more types of activities. They are now more typically a conglomerate than a narrowly focused organisation. However, this conglomerate approach where universities try to be a comprehensive ‘full

service' organisation is likely to be harder to maintain due to the many challenges out to 2028.

There was significant discussion about what niches (in a global but also Australian context) universities can fill and how these would translate into funding, prestige and support. The concept of finding a niche wasn't just a question of markets and students to focus on, but also as a way of identifying values, research priorities, and the broader role in the nation that would maximise the societal and global value individual universities can provide.

A significant focus on this discussion was the geographic focus of Australian universities across courses, research and branding? Do we want global universities with global prestige? Should we focus on having universities that are leaders in our geographic region – Asia, the Pacific and the Indian Ocean? How much should university priorities be defined by national interests, given significant Commonwealth Government funding? Or should the focus be more on the local and regional communities around different universities?

Obviously, these different focuses are not mutually exclusive and often reinforce each other. However, they often pull in opposing directions. For example, taking a 'national' mandate driven by government funding very seriously requires a focus on research on Australian landscapes, communities and issues. However, while this may be societally popular in Australia and get Government support, it will likely detract from global prestige given how global rankings currently work.

The local community aspects were also considered important. Universities can often provide substantial local social benefits while also developing as a leading research organisation. The example was given of the University of Cambridge taking over its local hospital (Athenbrooks) and both improving healthcare in the region but also developing it into a leading research hospital. While this is not necessarily the right model in many places, better local connections with authorities and businesses could provide significant benefits.

Another part of the discussion was the importance of geography, and even time zones, in understanding the communities and markets to focus on. In a global sense, Australia is in a different geography and time zone to other major university sectors – particularly the English speaking ones – and could therefore provide a complementary role. This provides many opportunities for regional perspectives and leadership – and a proximity to large regional markets (even by virtue of our time zone for digital

teaching) that other countries like North America and Europe don't have.

This discussion integrated a number of the benefits of what universities provide, including education, research and broader social good. Across all of these areas, the relative priority for different geographic locations will influence what is done and how effective different work can be. For example, there are significant opportunities to help a range of people and communities across Australia in regional areas and outside the normal education and research areas of focus. At the same time, there are similar opportunities regionally across the Pacific, South-East Asia and even Africa.

### **Internal structures, processes and incentives**

For research intensive universities to succeed under any of the scenarios explored, the consensus was that there needs to be changes to how these institutions operate, both explicitly but also the less tangible incentives and mindsets. Ways of working that were perfectly suited to a previous situation may not be right into the future, especially given the changes in work environments, global competition and cooperation, funding and conditions, and priority research areas.

This does not mean transforming universities to operate more like, say, businesses – as they are fundamentally different types of organisation with different roles and criteria for success. However, universities should consider lessons from other organisations they can adapt, before changes are forced on them from outside – which was considered a genuine possibility.

The broad changes in mindset and operation needed, as outlined above, are focused on the ability to work in collaboration or partnerships, both within the university sector and outside; the importance of inter-disciplinary problems and research; and the connection of theoretical and practical skills and disciplines. Broadly, the view was that internal structures and incentives, particularly for individual staff, provide limited useful encouragement for staff to act in this way but rather guide them to focus on their own set of personal or team interests – as defined by organisational structures and disciplines. Where incentives exist, they often don't encourage or support genuine partnership work, but rather focus on engagement with others, often on the researcher's terms.

While many of these incentives, particularly for academics who are chasing external research funding or publications, are set by government policy

or the global academic system, there are fewer internal incentives for agility, cross-disciplinary or impact-focused work. There have been some notable initiatives to encourage this type of work but it has tended to focus on specific, often large, projects rather than ongoing research. Academics feel like they will be penalised over the longer term for pursuing some of these activities, whereas a number of those involved would be very interested in options like secondment opportunities to very different research teams or outside of direct academic research.

It was also recognised that these types of work, especially multi-disciplinary problem focused activity, requires different types of skills and experience to those normally developed within academic settings. This applies both to the researchers but also those coordinating or managing these types of activities and teams. Management, as a set of skills that is distinct from administration, that enables researchers and teachers to do their jobs better or more productively was perceived to be lacking in the university environment.

There was one final issue around internal management that was raised a few times but there was no clear sense of how to resolve it. For many good reasons, universities rely on a diffuse, cultural

rather than hands on, approach to managing the direction and quality of research and teaching rather than the hands on management style found within the business or public service. A researcher's supervisor and the university are not directly responsible for managing the quality of their work, as a supervisor in a business is, due to important principles around academic freedom.

Instead, to ensure the quality of research staff, universities rely indirectly on mechanisms like peer review in quality journals via expectations on researchers to get published in those journals. However there are ongoing questions about the long term strength of the current peer review and journal system, including publication biases, time-delays, cost of access and the sustainability of a system built on academics volunteering their time to edit and review publications. This means that universities who base a significant amount of their reputation on the quality of their researchers, are likely to face challenges around how they can ensure their academics keep producing quality research and how they can recruit the best academics. Universities may need to actively encourage internal, even cross-disciplinary, challenge and review of research if the broader academic environment can no longer provide clear signals of quality.

## CHAPTER 3. UNIVERSITIES IN 2028: DELPHI SURVEY OUTCOMES

The Delphi survey conducted for the ANU 'Future University' project asked respondents to imagine the world, and particularly the Australian university sector, in 2028 – following on from the current pandemic and other events. Responses were received from 46 people from a wide range of academic, public and private sector backgrounds.

The aggregate mood of the responses envisaged an uncertain global and national environment, with a struggling, and likely smaller, university sector – but also one that contains opportunities for well-run individual universities. The overall challenge was summed up nicely by one respondent who wrote:

*'All stakeholders will want more from universities than can be reasonably delivered. We probably need to have the difficult discussion about who goes to university and to study 'what'.'*

### The university sector

While not a universal sentiment, it was common to expect a 'much smaller higher education and research sector with consolidation for survival'. This process is likely to be 'messy with unexpected impacts not only for smaller regional universities but also for some in the Go8 [Group of Eight]'. In fact, multiple respondents predicted Go8 consolidation, or even Go8 universities folding. Views on government responses to these dynamics were mixed. One view was that the government will pursue 'bailouts tied to university reform' whereas another was that they 'will do all they can to avoid bailing them out, instead inviting private sector support.' Notably, it was thought that this approach 'would be scoffed at by sector leaders yet might be the best possible outcome for that location'.

While it was most commonly motivated by the likely consolidation, another common view within the responses is that the 'the one size fits all (teaching/research/engagement) University template will unravel' although there were different views on what this would look like. The most common division was that between teaching-focused and research-focused organisations – even to the extent that 'the university sector will resemble the TAFE sector of today more closely than it does now'. Another envisaged distinction is between the 'elite institutions offering exclusively non-online offerings that served (at premium cost) the primary purpose of a tertiary education and now an ultimate luxury good' compared to those who 'cracked the formula of low cost, pedagogically effective and sufficiently

engaging digital offerings at scale, likely in partnership with technology companies, and possibly also entertainment production studios and/or gaming companies'.

There was a valuable range of views and the majority predicted a challenging period for universities with a likely contraction of the sector and greater differentiation between institutions due to a much stronger focus, from many directions, on the specific value – societal, educational and commercial – provided by universities.

### Value perceptions

These expectations of dramatic change to the university sector were often motivated by a sense among responders that, while universities are valuable in many ways, 'they have not been able to make the case for their traditional modes of operation'. This was expressed in different ways, but often that universities will not be seen as delivering 'value for money' or if they are an 'expensive luxury' as it is thought they will face a 'legitimacy crisis'.

There were numerous aspects to these perceived failures, including not educating students according to societal expectations, mismatches between research output and community demands, cultural divides and perceived poor internal management.

While there was significant support for a traditional university approach by many respondents, a common theme was that the community expects universities to 'equip students with skills and knowledge that put them in a strong position for real life jobs'. This is likely to become a more pressing issue as it is expected the workforce will become more 'fluid' and students will be preparing for 'multiple careers' – with the need for more flexible skills and the ability to change tack. To accompany that, it was thought by a number of people that there will be a 'rise in micro-credentials and short courses'. Many could see the decline in need and demand for traditional university degrees, even to the extent that 'business will partner with institutions to circumvent the usual graduate selection processes, offering Work Integrated Learning degrees (like degree apprenticeships)'.

Around research, there were many variations on the view that 'all stakeholders will expect universities to be nimble and contribute to society in immediate and tangible ways'. From a funding perspective, this is likely to mean an expectation that 'research institutes provide research that focuses on Australian issues' and that 'national interest tests become the norm'.

One respondent poses the warning that ‘research impact remains something that the sector continues to resist, although for the public and the funders this is a key element of the social contract around funding research’.

There was a view that universities, and particularly the Go8, will become increasingly elitist. Perhaps for economic reasons – they ‘believe their product is a monopoly product for which they can charge a premium’ or that only the wealthy will value tertiary education and, as one person put it, ANU will ‘become whiter and more Sydney north shore in composition’. The response of those who are not connected to universities in some way could be telling:

*‘For those who have not studied at a university, they feel increasingly ostracized from intellectual organizations. They indicate that they have no clue what universities do or why their taxpayer dollars should fund institutions that don't help create the workers we need’.*

Perceptions of poor internal management and organisational practices by universities were seen by many as an ongoing problem. The basic view is that ‘Governments will expect ‘value for money’ and leaner university operations models’. Put more fully, ‘Universities are seen by government and business – all of which have gone through significant and, even, continuing restructuring – as the last remaining area ripe for much overdue organisational change and reform’. Another aspect to this view is that ‘university employment conditions are seen as unacceptably generous’. Many seemed to think that reform here will be necessary to maintain funding and broad community support.

### University practices

Predictions on the ways universities will change their internal practices can be broadly divided into two. The first were the necessary changes to adapt and succeed in a different social, economic and (perhaps) cultural environment. The second result from COVID-19’s effects on lifestyle and work.

The major theme to emerge regarding the changing environment (the first set of predictions) was that universities will need to change with it – their mindsets, work practices, outputs and internal culture. Despite this imperative, many thought universities today tend to coast based on an out of touch belief in their own importance. Some thoughts about the necessary changes included the prediction that ‘traditional hierarchies were revised and resources were aligned to matrix around product

lines as well as content expertise’ or even that ‘the best universities now resemble hybrids of service provider companies and think tanks, led by genuinely dynamic corporate leadership, perhaps even lacking advanced degree training themselves’. One significant risk with change is that universities will be seen to lose their independence and distinctive value which could ‘demoralise its workforce to such an extent that those attracted into the university system as teachers and researchers will be there as a second or later choice’.

One obvious flow on effect from COVID-19 is the predicted switch to far greater online teaching and research collaboration. For a typical example, ‘blended learning will become the norm, with smaller campuses, less face to face contact and greater reliance on AI tools to deliver core elements of the student teaching and learning experience’. This will have profound effects on the campus environment, the skills needed by academics and university staff and the value proposition (and fees) from universities.

However, there are less immediate consequences as well. For example, ‘the emphasis on taking classes taught by top thinkers increases, thereby decreasing the need for large faculties with mediocre or less well known teachers’. As ‘large group lectures are a thing of the past and replaced with well-designed and professionally delivered online options’, it is likely that the top thinkers can be drawn from a global pool, potentially of ‘academic superstars’, reducing the role of academics on campus.

However, it was seen unlikely that everything will move online, as ‘students want to be known by someone in the university, they want someone to care about their future and have high expectations’.

Another impact from COVID-19 is that ‘Science is happening more quickly’. Results are getting published more quickly and many groups have shifted research priorities. In many cases, this is bypassing, or massively speeding up, traditional peer review structures. While it is not expected the current pace is sustainable, it may lead to long term changes to norms, particularly as ‘the public expectations of science finding solutions’ have also increased.

### Global changes

The majority of respondents expect a more uncertain and volatile global strategic and economic environment: ‘Globally the geopolitical order has become more unstable and is still in flux’. In part it may be due to ‘a collapse of US leadership and credibility’, ‘an omnipresent if not occasionally aggressive China’ or the fact that ‘efforts at global

cooperation and coordination hampered by continuing tensions between the two biggest powers – the US and China.’ We may even see ‘a complete re-thinking of the globalised economic system, which was dependent on a ‘just in time’ supply chain, and served a few at the great expense of the many’. Most generally, we will possibly see ‘The revenge of geography against globalisation and the internet’.

One consequence of this uncertain global situation is there will likely be an ‘enormous challenge in 2028 to maintain international research collaboration while ensuring the intellectual protection of that research’. More broadly, one view predicted a ‘bimodal distribution of trust in expertise in democracies’. Where there is existing ‘high levels of public trust in governments and expertise’, there is a more successful pandemic response, which further reaffirms the trust; and vice versa.

One critical question for the global order, and universities, is what borders and the movement of people looks like after the COVID-19 shock. The full range of views was expressed in the survey, from ‘we go back to the pre-jet era, when overseas travel required a significant allocation of time’ to everything goes back to normal after a blip. The median forecast would be a rebound but not to 2019 levels – with the obvious impact on international students.

One possible, positive outcome is that if Australia ‘can successfully manage a major epidemic like COVID-19’, it ‘will help attract more international students and immigrants in future when international travel resumes’.

One further repeated international concern are the ‘trends towards increased surveillance, concentration of government powers, protectionism, and exerting influence through manipulation of information’ that have been triggered by the

pandemic. These could have many seriously negative consequences across the globe.

### **Australian life in 2028**

The majority view was that the economic and social consequences of the pandemic are likely to be still reverberating in 2028. ‘We have grown to regard growth and prosperity as the norm – it’s not. We will be struggling in 2028 to regain the sort of growth and prosperity we have enjoyed for the last three decades or more’. This will have numerous flow on social effects – and will pull universities in multiple directions.

A lack of secure employment has historically led to greater enrolments in higher education, but a stagnant economy will constrain government, business and household budgets – leading to constraints on university budgets. Also, ‘universities will be under pressure to become more formal engines for productivity-enhancing innovation that can be commercialized and lift standards of living within Australia’.

Patterns of life and work will have shifted – both in time and location – with more people working away from the office and with more flexible hours. ‘Remote working is normal. People may even have jobs in places they’ve never visited’. ‘The norm is that most people work from home, either full time or in a hybrid set-up, some days in the office and some days at home’. Notably, this will likely create a much more global marketplace for skills and talent.

Due to concerns about supply chain vulnerabilities, there is likely to be ‘an increase in regional self-sufficiency. This includes an increase in relative proportion of goods produced locally’.



## CHAPTER 4. THE WORLD IN 2028: THREE SCENARIOS

The insights from the survey were collated into a range of scenarios, three of which were considered in detail. The scenarios should be considered as plausible extensions of current trends that illustrate important ways the world in 2028 could be different. The future will likely contain some combination of these, plus other issues, but they help clarify the challenges and opportunities facing universities.

### Scenario 1 – Global academia in our (digital) backyard

The COVID-19 pandemic started a permanent shift in economic and people movement patterns worldwide which were solidified by the following H1N7 Flu Pandemic of 2023 and the Ebola scare of 2025. Global travel is still running below 40% of 2019 levels with larger health and quarantine barriers between many countries. Australia remained relatively untouched by the global health crises but major people-based export industries such as tourism and education suffered dramatically.

To compensate, digital connectivity and platforms have boomed including dramatic improvements in VR technology. Working and studying from anywhere online (at least anywhere with high quality internet access) is largely the norm – with universities caught in the midst of this transformation. Students, and staff, now expect this, which has transformed the way that research and teaching is conducted but also the use of space on campus.

This always connected, operate from anywhere world has created a single global higher education market. The impacts on the university sector have been similar to what had previously happened in digital technology and media. The biggest university global brands (some established, some new) have captured an outsize share of the global market – just as the New York Times grew while more local newspapers, such as The Age, struggled. Some smaller universities with strong local or niche brands are succeeding but those in the middle – which includes the Group of Eight - are struggling.

The problem for them is that, when faced with the choice between studying – from home – at Harvard, LSE or the National University of Singapore and studying at a Group of Eight university, most students who can (domestic or international) are choosing the university with better global recognition. This particularly matters as they are also looking to work globally – still from home. The university brand name on your CV, even if it is a short course or accredited Massive Open Online Course (MOOC), matters more

to many students than the content of a degree. To capitalise on this, ambitious universities outside the Group of Eight have begun licensing arrangements with top global universities, so they now offer courses where the content is from places like University College London and New York University.

Similarly, those academics who can prefer to be working for Cambridge, MIT or ETH Zurich – even if their teaching is mostly done from Australia – as the associated prestige is valuable both personally and to their research aspirations.

Arguments for the distinctive value of local and Australian universities have failed to gain much resonance with the public, businesses and governments – beyond some parochial state governments. This has created intense lobbying from existing domestic universities, who want to be seen as delivering value for government. But the general direction of policy is to support our brightest students to get degrees from the best universities in the world rather than in maintaining our existing universities. Government funding may soon become institution neutral in the global market, with funding for university study not tied to Australian universities.

There are some funding streams, however, that are growing. Partnerships with industries and governments to produce specific work relevant courses for current or future workers, with relevant micro-credentials in lieu of traditional degrees, is an important part of many business and industry strategies. Some universities can take advantage of the rapidly rising value of their land endowments, which are under-utilised compared with anything around them.

### Scenario 2 – ‘Skills, skills, skills’ – but where is the cash?

The 2020s has seen a moribund and sclerotic global economy as few countries have escaped the fractured connectivity and debt overhangs triggered by the 2020 pandemic. The economic consequences of this ‘Lost Decade’ have flowed into a volatile security environment with high mistrust and fragile alliances. Low (or negative) growth and high unemployment are the new normal. In the global context, Australia is muddling along reasonably well, but at home that means severely constrained budgets and high jobless rates.

As is common in recessions or periods of poor economic growth, many people have been focused on education and improving their skills. This is

actively encouraged by governments, including a strong focus on the social equity benefits of increased access to education. There has been a boom in domestic student interest and enrolment at Australian universities – which partially offsets the declines in international student numbers.

The greater government focus on the benefits of higher education is, however, in the context of tight and shrinking funding on all measures. The social solidarity evident during the pandemic is often invoked as everyone is asked to pull together to get through the tough times. Research funding, for example, has been frozen and clearly focused on specific issues of perceived national importance.

Students, with no clear prospects for better days, are very focused on value for money – job and earning potential, worthwhile experiences and personal growth – and are far less willing to put up with sub-standard teaching and services. Technical education that is job focussed has become more attractive, breaking down the traditional expectation that ‘smart kids go to uni’.

The shrinking prospects for research within universities has seen many talented researchers head to the private sector in significant numbers. In a few places, this has created more of a critical mass of talented people which is producing a number of promising start ups and other innovative companies. These retain, at a minimum, strong informal links into universities.

The university sector finds itself in the difficult situation of being expected to deliver a significant social responsibility with less funding. So universities are forced to find efficiencies wherever they can. Given the growth is in domestic students, many shift funding and priority away from research activities – particularly complex, expensive research. Different models of credentials are also being tried as many students don’t see the value in another full traditional degree.

University management structures are seen as another source of efficiencies. Government is actively seeking a changed approach to managing universities, arguing for the appointment of professional managers rather than academics. The experience of hospitals, who were once run by doctors but are now run by specialised managers, is often cited as a model.

This push has given rise to increasingly bitter public debates about the role of the university and what academic freedom means. Some argue that academic freedom is only possible when academic institutions have the freedom to manage their own

priorities and affairs. Others argue that it is purely focused on the freedom academics have to make their own minds up, based on the evidence, about the topics of their research and not have the answers dictated elsewhere. Others seem to think that academic freedom is, in practice, an excuse for universities not to take their responsibilities seriously.

### **Scenario 3 – Global research-driven ‘tech race’**

While the rapid production of an effective COVID-19 vaccine in 2021 brought back the confidence to travel and the global economy bounced back, the overt tensions between the US and China that came to a head in late 2020 became a permanent feature of the global order. This new ‘Cold War’ – as the media insist on calling it – is less of a direct confrontation that has nuclear warheads pointed in all directions. It is more of an active, global battle for influence, market share and technology. Occasionally, it breaks out into minor proxy conflicts in different countries but the majority of the contest is in cyberspace, global legal and governance structures, and in achieving market share and influence.

One part of the ‘Cold War’ that remains familiar is the re-emergence of a massively funded, global technology race. China and the US are increasingly establishing two distinct technology ecosystems that each dominate within their respective spheres of political influence. High-end research institutions and technology companies worldwide are massive winners from this, with some strings attached. In addition to many security and geo-political restrictions, this funding is normally run with a Silicon Valley mindset – where ‘failing’ projects are allowed to fail fast and funding is often cut and re-prioritised rapidly. A core, and explicit, part of this strategy is to attract the brightest and highest skilled workers to different ecosystems and projects – with salaries to match.

This technology race, and particularly the ‘AI’ applications it has spawned, accelerated the global hollowing out of middle skill jobs. Demand for low skill jobs, involving significant manual labour, remains high and there is a boom in demand for the highest skills, particularly those who can integrate multiple complex fields of information. The middle skill, typically white collar administrative jobs, have been now largely automated.

Those Australian universities that are able to navigate the political restrictions and attract and nurture the best talent, from Australia and worldwide, and deliver world leading research quickly, are massively rewarded and are struggling to recruit to deliver on everything they could do. This is reinforced

by explicit government incentives to ensure that Australia plays (and gains the rewards from) an active role in the global technology race. Some university block funding, including special grants, has had strong incentives tied to it. The rest of the university sector is struggling as the value for a university degree has severely diminished for most people.

Global research norms have also been upended, particularly the system of journal publishing and peer review. The rapid pace of academic publishing during the COVID-19 pandemic, including the priority on pre-print publication, has created new expectations and ways of working. The majority of important research publications are now public and validated through public review processes before formal peer review can catch up. Superstar academics – and research groups – are increasingly sidestepping the

formal academic structures, processes and university systems and succeeding because of it.

However, Australian research funding and university governance has not been updated and so is caught in the old world. ERA and internal promotion measures focused on peer reviewed journal publications are increasingly out of touch with the real world. When the best research isn't published in traditional journals it is also hard for universities to assess and ensure the quality of research. To manage the pressures created by these gaps, some universities have spun out large parts of their functions (including whole faculties) as private entities as a way to build the flexibility needed to take advantage of the money and opportunities. A couple are thinking about trying to deregister as universities completely.

## APPENDICES

### Appendix A – Outline of the Project

The 'Future University' scenario project was commissioned by the ANU Global Engagement portfolio and ran from June – September 2020. The project worked through three phases that first collected insights about the future, then outlined plausible alternative futures that need to be considered, and finally explored potential university responses to those futures, with a natural focus on ANU.

The insight collection phase was built around a Delphi style survey on likely future directions and changes in universities. A very broad cross-section of experts and stakeholders from within and outside the university sector were invited to participate. Almost 60 responded, from a wide range of backgrounds and specialisations. Participants were asked to respond to the following four questions:

1. Looking back from 2028, what are the most profound changes we have seen from the COVID-19 pandemic in Australia and across the world?
2. Over the decade to 2028, how have the expectations on universities by all relevant stakeholders changed? This should include, but not be limited to, students, businesses, governments, researchers, and society more generally.
3. How has the university sector changed out to 2028? Which types of universities have thrived, which have suffered and why?
4. To help us understand the broader context universities will operate in, we would appreciate your insights about what is likely to change permanently following on from the pandemic over the next 10 years. This could include, but not be limited to, international dynamics, economics, social cohesion, governance and decision-making, and research and technological development.

A summary of the key insights and views from the Delphi survey is in Chapter 4, with further quotes around the likely future of the university sector in Australia in Appendix B.

In the second phase, the project team drew on these insights to develop a set of scenarios that provide contrasting views of how the university sector may change by 2028. Three scenarios, recorded in Chapter 4, were short-listed as worthy of further exploration.

These three scenarios were the basis of the third phase, which involved testing with a cross-section of university employees to identify opportunities, challenges and potential successful strategies within the different scenarios. This was done collaboratively through four online workshop sessions, involving around 40 people that covered most of the ANU Colleges, levels of seniority and experience, and mixed academic and professional staff experience. For a few people unable to make the workshops, individual response sessions were organised. A summary of the outcomes from these is at Chapter 3.

These insights formed the basis of the report, with some further work done to identify key themes and connect the diverse range of ideas and insights.

### Appendix B – Views on the divergence of the university sector

One of the key themes in the survey was the view that the university sector in Australia would be more diverse in the future. Given the strength of these views, and variety of models put forward, the rest of this section is a representative selection of direct quotes from the Delphi to illustrate the range of views.

Everything that follows is a direct quote from a survey response – and does not necessarily represent the views of the author.

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*'Three models have emerged:*

1. *Universities that have oriented towards teaching in vocational education, with close links to industry. This model is growing.*
2. *Private universities that do not necessarily seek to operate within the global university sector – the Australian Catholic University is an example.*
3. *Universities that seek to sustain the idea of research led teaching within a global community that sets standards and strategic policy frameworks. This model is under stress, particularly in the non-stem areas'.*

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*'Universities are now teaching focused although major universities are linked to separately funded research institutes, particularly in medicine. So students now expect their university to be focused on high quality teaching and most of their lecturers are 'teaching focused' staff. The government expects research institutes to provide research that focuses*

on Australian issues. These institutes are underwritten by on-going foundational funding (generally of 10-15 duration), specific grants from government via a reorganised ARC, and commercial revenues from their research partnerships with private industry. There is a clear split between teaching and research activities and cross subsidisation of these activities is specifically disallowed'.

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'Universities who have thrived fall into three categories:

1. The Global Elite (universities that are top of mind for the average person) – This does not include the Go8, but instead includes the US Ivy League and Oxford and Cambridge. These universities thrive because of endowments, brand recognition (being featured in Hollywood movies, mentioned in the global press, and being name-dropped frequently - in a fairly obnoxious way - by alumni), and a critical mass of the world's top academics.
2. Universities that specialize - this includes more technically oriented institutions like RMIT, Caltech, MIT, UTS. - These universities thrive because the students who attend them find jobs and the academics who work there are solving problems that are increasingly relevant to society. Businesses also enjoy working with these institutions because they have larger commercialization arms, they are more commercially oriented, and they see the industry as natural partners, not ideological foes.

Universities that are well managed - this includes universities like Wollongong, Western Sydney, etc. These universities never had the luxury of global student demand driven by high rankings. They service their immediate community and they have to work hard for every international student they get. These universities are business-minded and hungry. They prioritize efficiency and make hard decisions rapidly and regularly. Their leaders openly balance the needs of the university against the needs of the community - and they sometimes prioritize the needs of the university first to ensure that the community can thrive in the long term.

Universities who suffer have some of the following traits:

1. They are lead by people who are afraid of making tough decisions
2. They are lead by people who don't think their institution is flawed or has room to improve

3. They are lead by a group of people who are unable to agree on anything but continue to insist on making decisions based on consensus.
4. When told that the vast majority of Australians consider the institution to be no different from other institutions, they refuse to listen, point to little known examples or parts of the university that have little broad appeal, and indicate that those who are critical aren't well informed enough to provide an opinion.
5. They resist even the most modest changes and insist on maintaining what they perceive to be a rich and extremely important institutional history. When asked to describe what the institution has done to demonstrate the value of its history, they point to one-five examples that are 10-20 years old and struggle to explain the value delivered more recently in a way that would be meaningful to all Australians.
6. They have failed to get the basics right.
  - a. They lack formal systems and processes that deliver efficient results
  - b. They lack the systems and data infrastructure required to support nearly every aspect of the university
  - c. Their hiring processes hire more 'people like me' and disincentivize or actively discriminate against those who bring new ideas and perspectives
  - d. They have a poor culture that is driven by leaders who fail to lead by example, fail to address bad workplace behavior, and fail to communicate the values and behaviors that must be demonstrated consistently
  - e. They fail to listen to student needs when developing programs. Instead, they dictate what is in the student's best interest often resulting in programs which are unprofitable due to the fact that they appeal to a very small proportion of the population
  - f. They do not use data or evidence to inform their decision making, instead of relying on politics, internal lobbying, and consensus to arrive at decisions that dissatisfy everyone equally.
  - g. They aspire to be great but fail to define greatness, describe what's required to be great, and fail to support staff to get there'.

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'Professional Universities – those that focus on professional degrees – law, nursing, teaching etc. These will thrive in the first half of the decade but will need to future proof for the inevitable reductions students. It will be necessary to seriously consider teaching only roles to respond to teaching load and

*ensure that academics are delivery industry relevant courses.*

*Civic universities “that have a place-based strategy about how it connects to its local city area and local community” will survive, but may look significantly different, income may not only from educational offerings. More likely to support localised entrepreneurs and innovation.*

*Research Universities – the G8 will shrink, and we’ll see less repetition of speciality i.e. archaeology will be taught at one not many. Those that have specific industry they support will survive – i.e. ANU and government, UQ and medicine’.*

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*‘The public university sector by 2028 in Australia will have caved in and given its last gasp of independence about two-thirds of the way through the decade. Its resource pool from government will not increase but neither will philanthropic contributions replace this in a country with a notoriously poor history of philanthropy for the university sector (unlike the USA), combined with more belt-tightening as the longer-term economic impacts of COVID-19 and climate change continue to affect what philanthropic largesse exists. There will be fewer universities, with an overall contraction of the sector and less integrity in university governance structures and procedures. Those universities that remain will be expected to demonstrate clear niche strengths that significantly distinguish them from other universities – there will no longer be a sector in which a broad range of courses across disciplines will cater for local populations’.*

## About this publication

The National Security College publishes research and analysis to inform policymakers on topical national security issues facing Australia. Occasional papers are informed by consultation, and reviewed by experts.

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**T** +61 2 6125 1219

**E** [national.security.college@anu.edu.au](mailto:national.security.college@anu.edu.au)

**W** [nsc.anu.edu.au](http://nsc.anu.edu.au)



@NSC\_ANU



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