

THE IMPACT OF COVID-19 ON HIGHER EDUCATION AROUND THE WORLD

IAU Global Survey Report

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ISBN: 978-92-9002-212-1

Published by the International Association of Universities, May 2020.

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The International Association of Universities

The Global Voice of Higher Education

Founded in 1950, under the auspices of UNESCO, the International Association of Universities (IAU) is the leading global association of higher education institutions and organisations from around the world. IAU brings together its Members from more than 120 countries for reflection and action on common priorities. IAU is an independent, non-governmental organisation and an official partner of UNESCO (associate status).

It acts as the voice of higher education to UNESCO and other international organisations, and provides a global forum for leaders of institutions and associations. Its services are available on the priority basis to Members but also to organisations, institutions and authorities concerned with higher education, as well as to individual policy and decision-makers, specialists, administrators, teachers, researchers and students.

The IAU Global Survey is part of a larger set of activities carried out by IAU to inform about the impact of COVID-19 on HE.

Research

IAU plans to carry out three global surveys on the impact of COVID 19 on universities and other higher education institutions. This first Report analyses the outcomes of the first survey. Next iterations are planned for fall 2020 and for 2021.

Resources and information sharing

IAU developed a series of Webpages¹ to make useful information collected by IAU together with partner organisations around the world available to the global higher education community and other actors in society.

As well, on an exceptional basis and to contribute to making higher education information available to the entire HE community in these particular times, IAU offers FREE access to the advanced search for the *IAU World Higher Education Database* and to the *IAU HE Bibliographical Database (HEDBIB)* until end of August 2020.

Advocacy and debate

IAU fosters dialogue on the impact of COVID 19 on the future of higher education through virtual Global Meetings of Associations, regular virtual meetings with partners and through a series of international webinars. Co-organised with the Boston College *Center for international Higher Education (CIHE)*, CHEA and the Council of Europe, various UN bodies, this series of Webinars on the Future of Higher Education gives the floor to higher education stakeholders, including rectors, students, researchers, multilateral organisations from all five continents. These Webinars are made available for free. Recordings are shared via the IAU YouTube channel². Papers³ are also being published to advocate for the importance of higher education for today and tomorrow and to inform about the various impacts that will challenge the very future of higher education and, as a consequence, society at large.

¹ These pages are accessible online: <https://www.iau-aiu.net/Covid-19-Higher-Education-challenges-and-responses>

² https://www.youtube.com/channel/UCT5nt5FGVklxrtUHiNF_LFA

³ e.g. Marinoni G., van't Land H. The Impact of COVID-19 on Global Higher Education (2020) International Higher Education Special issue 102

Acknowledgements

The IAU Global Survey on the impact of COVID-19 on Higher Education is a research project that was conceived and executed by the International Association of Universities (IAU) in a relatively short time. The realization of the present report has been possible only thanks to the contribution of a large number of individuals and organizations from around the world.

Above all, a note of thanks goes to each institution and its representatives who had a hand in completing the questionnaire, despite the many concurrent challenges they faced. IAU is expressly thankful to every single respondent, without them this report would have never existed.

We are particularly grateful to all partners who distributed and promoted the survey, allowing a sufficient number of replies to be collected in a relatively short amount of time. Among them, Agence Universitaire de la Francophonie (AUF), Association of Commonwealth Universities (ACU), European University Association (EUA), Consejo Interuniversitario Nacional (CIN) in Argentina, the Hungarian Rectors Conference and Higher School of Economics in Moscow provided much appreciated assistance by promoting the questionnaire among their Members which resulted in good numbers of replies in their respective regions and countries.

A special mention for the University of Bologna, Italy and vice-rector prof. Alessandra Scagliarini, who tested the survey and suggested some important modifications to the questionnaire.

The main authors of the report would not have been able to conduct such a project alone and we consider the present report as the product of a collective effort inside and outside the IAU.

For this reason, we want to thank all members of the IAU Working Group of COVID-19, who contributed to the drafting, revision, translation, finalization and dissemination of the questionnaire, and the drafting, revision and finalization of the report.

A special thank you note goes to Alice Goyau, IAU Manager, Communication, for her editing of the report.

Last but not the least, we are grateful to Pam Fredman, IAU President, for her revision of the report and for her inspiring preface.

We hope that this report will provide you with a first global overview of the disruption caused by COVID-19 on higher education around the world and on the first measures undertaken by HEIs to minimize this disruption and to continue fulfilling their missions of educating the next generations, of advancing science and knowledge through research, and of providing service to local communities and society at large.

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Foreword



Dear Members of the IAU,
Dear Members of the Higher education Community,

The IAU is pleased to share the first IAU Global Survey Report on *The impact of COVID-19 on higher education around the world*.

IAU is the global non-governmental association reaching out to all universities, on all continents. Created 70 years ago, under the auspices of UNESCO, the IAU represents the global voice of higher education from around the world and offers a unique global platform for international cooperation, debate and action on higher education. It promotes and advocates for value based higher education and for its key contributions to society. One of its responsibilities is to provide the higher education sector and all stakeholders involved with global information and trends analysis.

The COVID-19 pandemic, which within weeks has led to the unprecedented health and socio-economic crisis which we live in and which will mark our times for long, has severely impacted the entire higher education sector around the world.

One particular issue that the COVID-19 pandemic has shown is the need for increased international and global perspectives to analyse the various impacts of COVID-19 in the short medium and long term. Several higher education organisations and associations, including student associations, and other organisations involved in higher education are conducting surveys with specific focus on a region or on specific issues arising. IAU is uniquely positioned to analyse the effects of the pandemic on HE at the global level. The overall understanding that our combined efforts generate about the current challenges that institutions and national systems face helps inform future perspectives of and on higher education. International and global perspectives are more important than ever in light of the pandemic and its effects, also to revisit the global goals as set by Agenda 2030 and in order to better meet them through higher quality collaborative higher education research and teaching.

Indeed, COVID-19 is a viral pandemic that affects all of us, all around the world. It has impacts on the individual and on society at large. The health crisis has quickly evolved into an economic, cultural and social crisis. Immediate responses have been developed primarily to control and curb the spread of the infection, and led to the closure of entire countries, the reestablishment of borders for both people and goods. The number of infections and reported deaths are decreasing. Yet responses now also have to address all other related impacts and not the least those affecting the HE sector.

The measures taken have had an immediate effect on higher education. They have impacted, often dramatically, the conditions under which higher education all of a sudden had to perform research and what is now often referred to as 'emergency online education'; students need assistance; staff face unprecedented challenges, including job insecurity; university leaders had to reinvent how to run their campus operations. The consequences will be felt way into the future. In order to envisage medium- and long-term scenarios, it is important to capture what is happening now, what are and will be consequences for national and international students,

for part time, contract based or tenured faculty and for all other staff. This report analyses the immediate impacts on education and research, and on HE's political and community engagement. The next two survey reports being planned will report on the medium and long term impacts. They will take place in Fall 2020 and later in 2021.

A positive trend highlighted in the survey is the incredible innovative approaches to issues faced and the resilience of the sector. As well of great interest is the increased interest of policy makers for higher education competence, everywhere around the world. It is to be hoped that this will counterbalance the negative trends being reported on for HE before the outbreak, and that it will bring back belief and trust in facts and the value of shared experience.

At the same time, many universities and other higher education institutions already foresee the impacts of the move online or the impacts of economic crisis on national and international students and their families, including closure of universities for short, medium or long term. The grim financial future that many HEIs will have to face, while others are even at risk of seeing their activities being closed altogether, will weaken the capacity of HE to assume its responsibilities to society. Students need to be assisted, staff needs to be protected and assisted, the institutions and the systems need to be supported.

It is clear that the future of higher education needs rethinking in many ways. International and multilateral cooperation within the higher education sector and with policymakers, communities and other stakeholders will need to be increased and strengthened. The short term consequences of COVID-19 revealed throughout this survey are an eye-opener and a start for addressing the long term consequences to be faced. The lessons learned so far must guide future developments of the sector as a whole.

High quality research and education is required; likewise the equality agenda needs to be supported everywhere in order for the innovation needed to rebuild our society will be done by and with all, and not only by those who will be able to afford it.

The need for knowledge creation and dissemination is as important as ever especially since we ambition to meet the global challenges identified and to build a sustainable future. IAU is committed to support the higher education sector and all stakeholders, including in particular the leaders, and through them the HE staff and students, to ensure they can continue to help construct the world we need.

Pam Fredman
IAU President,
Former Rector,
University of Gothenburg, Sweden

Hilligje van't Land
IAU Secretary General

Introduction

In December 2019, a viral outbreak of pneumonia of unknown origin occurred in Wuhan, China. On 9 January 2020, the World Health Organization (WHO) officially announced the discovery of a novel coronavirus: SARS-Cov2. This new virus is the pathogen responsible for this infectious respiratory disease called COVID-19 (Coronavirus Disease).

COVID-19 spread quickly around the world and was declared a pandemic by the WHO on 11 March 2020.

According to the WHO, on 1 April 2020 (at the time this Survey was conducted), there were 783 360 confirmed cases of COVID-19 in 205 countries or territories around the world, having caused the death of 37 203 people. One month later, on 7 May, there were 3 634 172 confirmed cases of COVID-19 in almost all countries and territories of the world, having caused the death of 251 446 people.

In a couple of months, while the virus was spreading around the world, China managed, thanks to radical distancing and confinement measures, to reduce the cases of local transmission to zero. The success of social distancing and confinement measures adopted by China and strongly recommended by the WHO, encouraged many other countries to take the same measures.

As of 1 April 2020, already more than 3.4 billion people, representing 43% of the world population, were in lockdown in more than 80 countries and territories around the world. The lockdown and social distancing measures immediately had an enormous impact on higher education.

The impact on Education and in particular Higher Education

According to UNESCO, on 1 April 2020, schools and higher education institutions (HEIs) were closed in 185 countries, affecting 1 542 412 000 learners, which constitute 89.4% of total enrolled learners. At the beginning of May, some countries, experiencing decreasing numbers of cases and deaths, started lifting confinement measures. However, on 7 May (the time of writing the report), schools and higher education institutions (HEIs) were still closed in 177 countries, affecting 1 268 164 088 learners, which constitute 72.4% of total enrolled learners.

In order to better understand the disruption caused by COVID-19 on higher education and to investigate the first measures undertaken by higher education institutions around the world to respond to the crisis, the International Association of Universities (IAU) decided to launch the IAU Global Survey on the impact of COVID-19 on higher education around the world. It was available online and open from 25 March until 17 April 2020.

The IAU Global Survey is not the first nor the only survey on the impact of COVID-19 on higher education. Different organisations, as for instance the Institute of International Education (IIE) in the USA or the European Association for International Education (EAIE) and the Erasmus Student Network (ESN) in Europe, conducted surveys as well. These surveys are interesting because they target specific stakeholders in higher education such as international

relation officers or students. They predominantly focus their analysis on the impact of COVID-19 on international education. The American Council on Education (ACE) in the USA, conducted surveys with a broader perspective, investigating the impact of COVID-19 on not only international higher education, but also more generally on higher education. All above mentioned surveys are national or regional in scope.

What makes the IAU Global Survey unique is that it tries to capture a description of the impact of COVID-19 at global level and on higher education in the broader sense, including all areas of universities and other Higher Education Institutions (HEIs) missions of teaching and learning, research and community engagement.

The IAU Global Survey is by no means a complete or exhaustive analysis of the impact of COVID-19 on higher education. It does provide however for a first analysis of the phenomenon at a global level. The outcomes deserve to be investigated further and the results, due to the very nature of the survey, pertain to a certain period of time only. The Survey was carried out in a period which coincided with different stages of the propagation of the pandemic around the world.

At that time, the epidemic was already under control in China, South Korea and in other Asian countries, while it concurred with the peak of the number of infections in many countries in Europe. It was a period in which the number of infections in North America were rising fast and the beginning of the epidemic in Africa and Latin America.

This is important to keep in mind when reading the results of the survey. The epidemic evolves in time and what was true one month ago might not be true now or in one month's time.

Nonetheless, it is useful to have a first global overview. IAU is planning to conduct two subsequent versions of the survey, one in October 2020, when the new academic year (or semester) in many countries around the world would have started, and one in 2021, when hopefully the pandemic will be over. The aim of the third survey will be to monitor the long-term impact of the pandemic on higher education.

The survey is part of a larger set of activities carried out by IAU to inform about the impact of COVID-19 on HE.

As stated above, many organisations around the world are collecting and sharing useful information. IAU developed a series of Webpages to make these available to the global higher education community, and other actors in society.

IAU hopes that this Global Survey Report will stimulate more research on the impact of COVID-19 on higher education and serve as a useful source of information for everyone interested in higher education.

General information on the IAU Survey

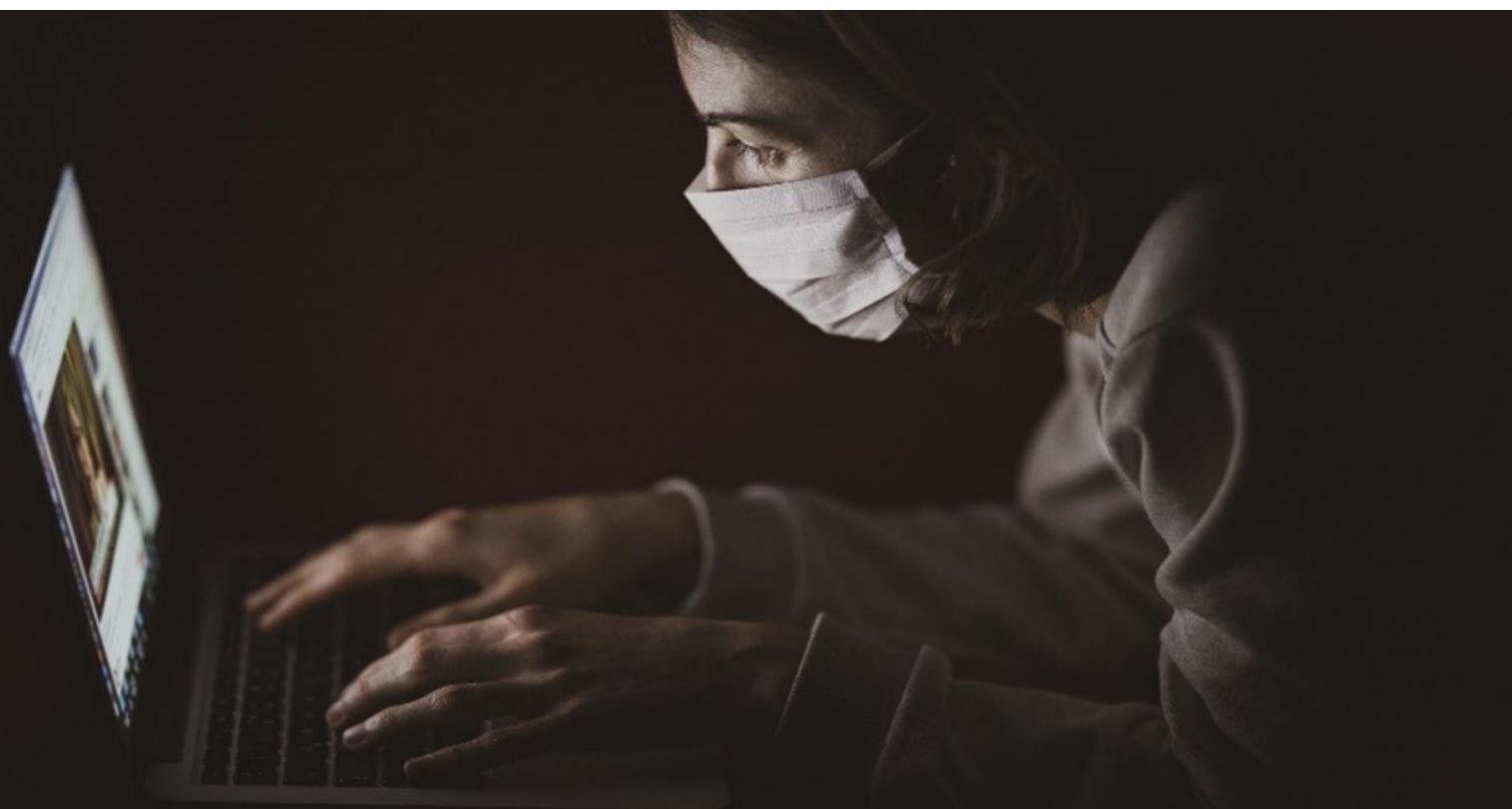
The *IAU Global Survey on the impact of COVID-19 on higher education around the world* was available online from 25 March to 17 April 2020. It received 576 replies from 424 universities and other Higher Education Institutions (HEIs) based in 109 countries and two Special Administrative Regions of China (Hong Kong and Macao).

In case of multiple replies from the same HEI, only one reply per HEI was kept for the analysis, therefore the final number of replies reviewed for the analysis is 424. Selection criteria were: the completeness of the answer (complete vs. incomplete answers), the position of the respondent inside the institution (priority was given to the highest position, e.g. rector vs. faculty member) and the date of completion (at the same level, e.g. two faculty members, the most recent one was retained).

The Survey was distributed via an email campaign. By drawing on the IAU World Higher Education Database (WHED: www.whed.net), it was addressed to 9 670 HEIs. A Call for participation was also published on the IAU website, shared through Twitter, the IAU E-Newsletter and circulated thanks to IAU Member Associations and Partners.

Because of these multiple channels of distribution, the calculation of a correct response rate is not possible. However, the number of 9 670 HEIs with contacts in the WHED can be considered as the approximate number of HEIs contacted.

The majority of questions in the survey were closed questions; respondents had to choose between certain options. However, there were also two optional open questions, which gave respondents the opportunity to report on the most important challenges encountered in light of the current crisis; these questions allowed them to identify potential opportunities or changes that they believe may impact higher education beyond the immediate emergency situation. 320 of the respondents (i.e. 75%) provided contributions to these questions and key trends were identified across the responses.



Summary of main findings

- The survey analysis is based on **424 full replies** from unique HEIs in **109 countries** and two Special Administrative Regions of China (Hong Kong and Macao). Results are analysed both at the global level and at the regional level in four regions of the world (Africa, the Americas, Asia & Pacific and Europe).
- Whereas Africa and Europe are overrepresented in this survey, the Americas and Asia & Pacific are underrepresented.
- The **profile of respondents** is broad with Faculty members (20%), Heads of institution (17%) and heads of international office (16%) being the most common respondents.
- Almost all **institutions** that replied to the survey have been **impacted** by COVID-19: 59% of them replied that all campus activities have stopped, and the institution is completely closed. The percentage of institutions in Africa responding to the same question is as high as 77%.
- Almost all HEIs (91%) have **infrastructure** in place to **communicate** with their students and staff about COVID-19. Despite this, respondents reported an immediate challenge to ensure clear and effective communication streams with staff and students.
- Almost 80% of respondents believe that COVID-19 will have an **impact** on the **enrolment** numbers for the new academic year. Almost half (46%) believe that the impact will affect both international and local students. Some HEIs, especially private ones, reported that this impact would have negative financial consequences.
- Two-thirds of HEIs reported that their **senior management and faculty** have been **consulted** by public or government officials in the context of public policy development relating to COVID-19.
- Almost half (48%) of respondents indicated that their **government/ministry of education** will **support** their institution in mitigating the disruption COVID-19 is causing. The most common support being assistance to complete the academic year.
- As far as **partnerships** are concerned, 64% of HEIs reported that COVID-19 would have a variety of effects. Half of them reported that COVID-19 weakened the partnerships, while only 18% reported that it strengthened them. However, for 31% of respondents, the COVID-19 pandemic created new opportunities with partner institutions.
- At almost all HEIs, COVID-19 **affected teaching and learning**, with two-thirds of them reporting that classroom teaching has been replaced by distance teaching and learning. The shift from face-to-face to distance teaching did not come without challenges, the main ones being access to technical infrastructure, competences and pedagogies for distance learning and the requirements of specific fields of study.
- At the same time, the forced move to distance teaching and learning offers **important opportunities** to propose more flexible learning possibilities, explore blended or hybrid learning and to mix synchronous learning with asynchronous learning.

- COVID-19 has had an **impact on international student mobility** at 89% of HEIs. The type of impact is diverse and varies from institution to institution, but everywhere it has been negative.
- Fortunately, the majority of HEIs have **contingency plans** in place to mitigate this impact.
- At the same time, 60% of HEIs also reported that COVID-19 has increased **virtual mobility and/or collaborative online learning** as alternatives to physical student mobility. This may safeguard internationalization to some extent but this shift will have to be analysed in more detail.
- A bit more than half of the HEIs are planning to carry out **exams** for the semester as planned, although the majority of them through new measures. However, there is substantial regional variation with 80% of HEIs in Europe planning to carry out exams, while exams are at risk of being postponed or cancelled at 61% of HEIs in Africa.
- As far as research is concerned, 80% of HEIs reported that **research has been affected** by the COVID-19 pandemic at their institutions. The most common impact of COVID-19 has been the cancelling of international travel (at 83% of HEIs) and the cancellation or postponement of scientific conferences (81% of HEIs). Moreover, scientific projects are at risk of not being completed at a bit more than half of HEIs (52%).
- Only 41% of HEIs are involved in COVID-19 research, but at almost all of them researchers contribute to current **public policy development**. Three quarters of institutions are contributing to public policies either through their institutional leadership or through their researchers. A quarter of HEIs are considered important stakeholders for public policies development by their governments, both as institutions as such that need to be consulted, and for their expertise in research.
- For the large majority of HEIs, COVID-19 **impacted their community engagement** initiatives. At a bit less than half of them the impact was positive - the crisis increased HEIs' community engagement, whereas at a bit less than one third the impact was negative - it decreased HEIs' community engagement activities.
- At the regional level, the **impact is unequal**, with COVID-19 having mainly increased community engagement in the Americas and decreased in Asia & Pacific.
- More than half of HEIs are carrying out community **engagement activities** in the context of COVID-19. Activities are diverse and vary from one institution to the next.

Profile of the respondents

Geographic distribution

HEIs were classified, accordingly to their country of origin, in one of the following four regions of the world:

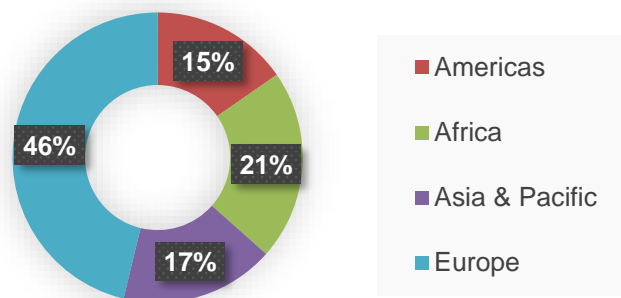
1. Africa
2. Americas
3. Asia & Pacific
4. Europe

The reason for using these four regions is due to the number of replies received and the statistical relevance. Although at different levels of confidence and with different margins of errors, the number of replies in all these four regions is representative enough to be statistically relevant and allow for a regional analysis.

More detailed information about the definition of the regions is provided in Annex I.

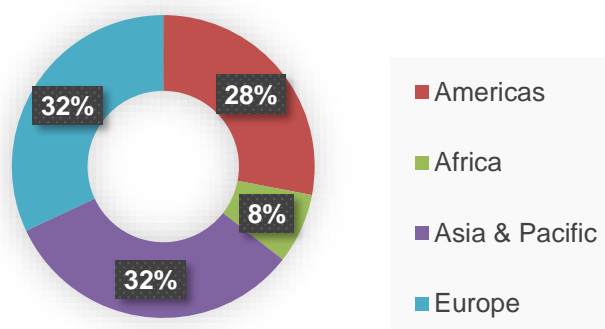
The distribution of replies in these four regions is represented in Fig.1 below.

Fig. 1: Replies - 4 regions



This distribution can be compared with the distribution of HEIs in the WHED in the same four regions. (Fig.2).

Fig. 2: HEIs in WHED - 4 regions



It is clear that Africa and Europe are overrepresented among respondents of the survey, while the Americas and Asia & Pacific are underrepresented.

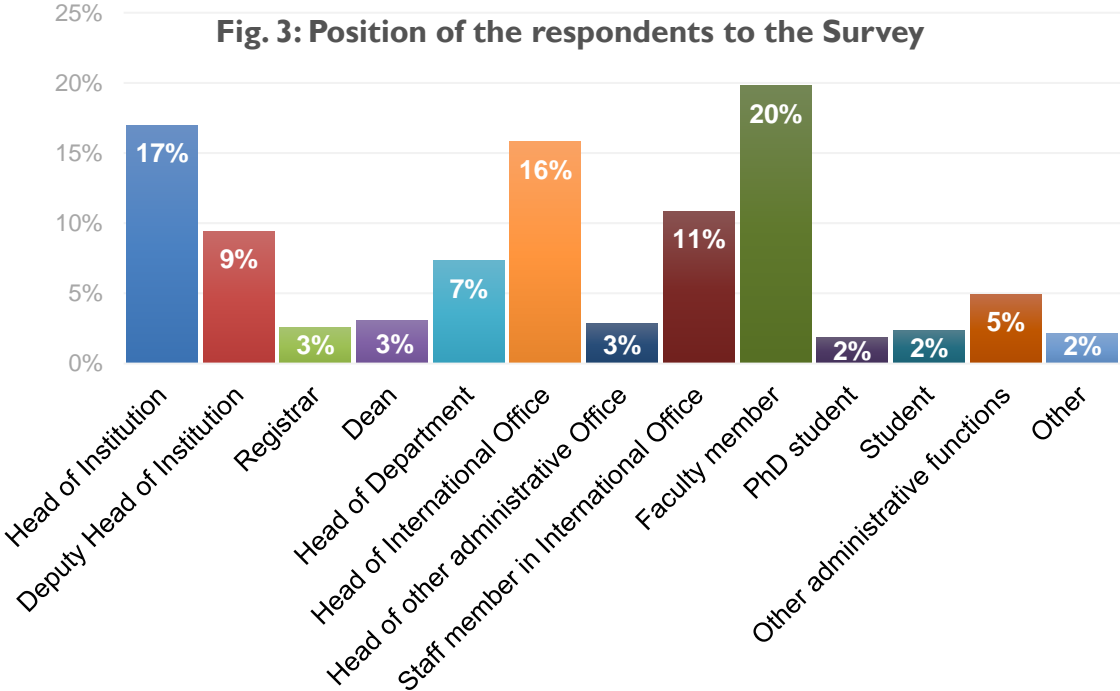
In terms of countries replying to the survey, the distribution of replies per country is broad (424 replies in 111 countries or territories), with the Russian Federation being the country with the highest number of replies (28 constituting 6.6% of the total answers received). The first five countries per number of replies are reported in Table 1.

Table 1: top 5 countries by number of replies

Country	Number of replies	Percentage on all replies
Russian Federation	28	6.6 %
Ukraine	18	4.3 %
Argentina	17	4.0 %
France	16	3.8 %
Romania	15	3.6 %

Position of the respondents to the survey

The distribution of positions of respondents in the survey is also broad. (See Fig.3).



The most common position of respondents are Faculty member (20%), Head of institution (17%) and head of international office (16%).

The fact that the highest number of respondents are faculty members is somehow surprising, as the questionnaire was sent to heads of institutions and heads of international offices. This means that institutions circulated the questionnaire among their faculties.

Regional analysis

The most common position of respondents differs between the four regions of the world. Faculty members are the most common respondents in Africa, where they represent more than one third of all replies (36%). They are the second most common group of respondents in Asia & Pacific (16%) and Europe (16% on par with heads of institutions), while in the Americas they are only the fourth most common group.

In the Americas, the most common groups are heads of institutions and heads of international offices, both of them representing 25% of all replies.

Heads of international offices are also the most common group in Europe, where they represent 19% of all replies, while in Asia & Pacific the most common group are heads of institutions (18%).

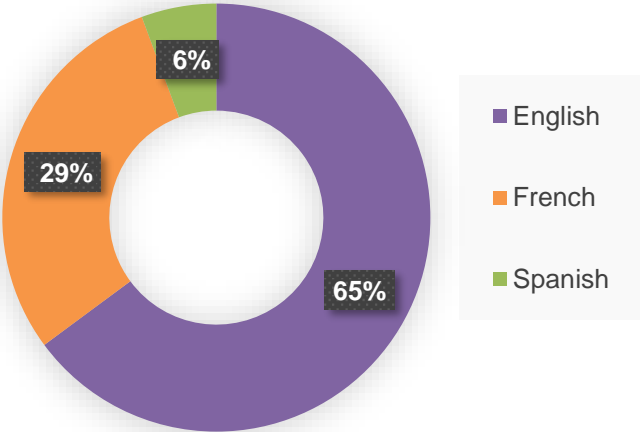
Language of completion

The survey was a trilingual survey and respondents could choose to reply in either English, French or Spanish. The distribution of replies according to the language of completion is reported in Fig.4 below.

The majority of respondents replied in English, a bit less than a third in French and only 6% in Spanish.

Respondents that chose to reply in French are mainly located in Francophone countries, but not exclusively. Respondents that chose to reply in Spanish are almost all located in Spanish-speaking countries.

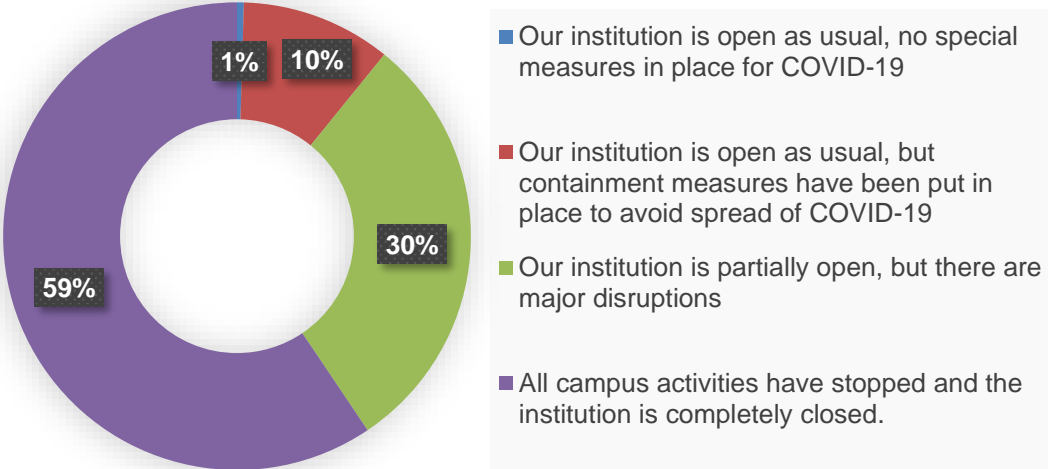
Fig. 4: Language of completion



General Assessment of Covid-19 Impact on Higher Education

Almost all institutions that replied to the survey have been impacted by COVID-19. Only 1 institution out of 424 (one HEI located in Burundi) replied that their institution is open as usual with no special measures in place for COVID-19, and 59% of them replied that all campus activities have stopped and the institution is completely closed. (Fig.5 below).

Fig. 5: How has COVID-19 pandemic affected your institution?



Regional analysis

Africa is the region with the highest percentage of HEIs with campuses closed because of COVID-19 (more than three quarters of them: 77%).

This result might be surprising, because at the time of the survey Africa was the region with the lowest number of reported COVID-19 cases in the world, while more affected regions were Asia & Pacific and especially Europe. These results might indicate that African HEIs decided (or were obliged by their governments), to close their campuses as a preventive measure, much more in advance than HEIs in the other regions.

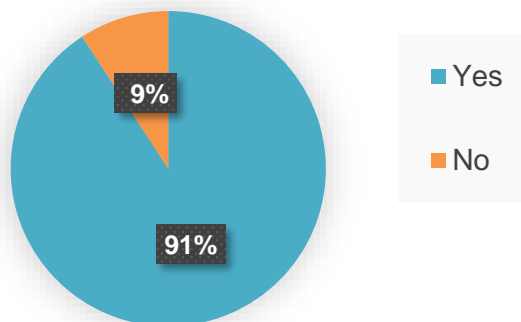
The percentage of HEIs with closed campuses in the other three regions is almost the same (55% in Asia & Pacific and Europe and 54% in the Americas).

Communication

Almost all HEIs (91%) have infrastructures in place to communicate with their students and staff about COVID-19. This high percentage might suggest that HEIs are using already existing communication means in order to inform their students and staff. (See Fig.6 below)

Despite the fact that 91 % of the respondents indicated that they have the necessary infrastructure in place to communicate between staff and students, respondents provided more details on the challenges faced in the open questions at the end of the Survey. In fact, although the infrastructures exist, several institutions report that an immediate challenge generated by the lockdown was to ensure clear and effective communication streams with staff and students.

Fig. 6: Do you have infrastructure in place to easily communicate with students (and staff) for updates and information?



Regional analysis

While in Asia & Pacific (99%), the Americas (97%) and Europe (97%) almost all HEIs indicate to have infrastructures in place to communicate about COVID-19, in Africa this percentage is lower (66%). There is one third of African HEIs that have no communication infrastructures in place.

It is interesting to note that 87% of these African HEIs that replied that they do not have adequate communication infrastructures in place, replied to the previous question that their campuses are closed. This is a worrying signal as staff and students of these HEIs might completely lose contact with their institutions for the duration of the closure of these campuses.

In the open questions, respondents stressed that the challenges with communication are not necessarily linked to the question of access to infrastructure. In fact, challenges in keeping a good communication flow with students and staff are reported by HEIs even in Europe where 97% of them report to have the necessary infrastructure in place.

Therefore, it is rather a question of how to plan and manage clear communication streams to provide the necessary guidance in crises marked by a high level of uncertainty.

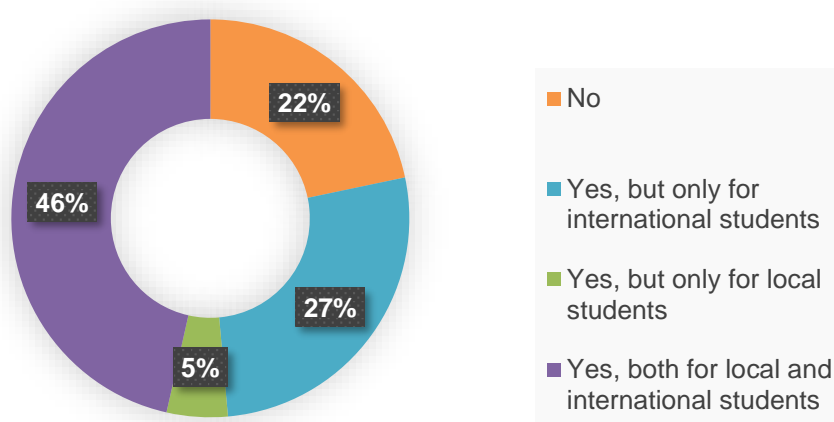
To exemplify how communications have changed, a respondent explained that social media have been explored and used increasingly to maintain contact with students.

Enrolment for the new academic year

As many as 78% of respondents think that COVID-19 will have an impact on the enrolment numbers for the new academic year. Almost half (46%) indicate that the current pandemic will impact both international and local students. This group of HEIs might be heavily impacted, especially if they rely financially on enrolment numbers.

HEIs consider that the enrolment of international students will be the most affected (73% believe that, while 51% think that the enrolment of local students will be affected). (Fig.7)

Fig. 7: Do you believe COVID-19 will affect enrollment numbers for the new academic year?



Regional analysis

African HEIs are the most optimistic in terms of impact of COVID-19 on their enrolment numbers, one third of them think that there will be no impact. On the other hand, HEIs in Asia & Pacific are the most negative, 85% of them believe that COVID-19 will have a major negative impact on their enrolment numbers.

The percentage of HEIs that believe that both the enrolment of international and local students will be affected negatively is almost the same as the one at world level in all regions. The responses collected through the open questions at the end of the questionnaire confirm the concern about the enrolment process for the coming semester or year. Some report in particular that students and families will be hit hard by the financial consequences of the crisis and may not have access to appropriate funds to enrol in higher education. Another challenge is to ensure adequate entry level exams in the present situation for institutions that depend on such measures for enrolment.

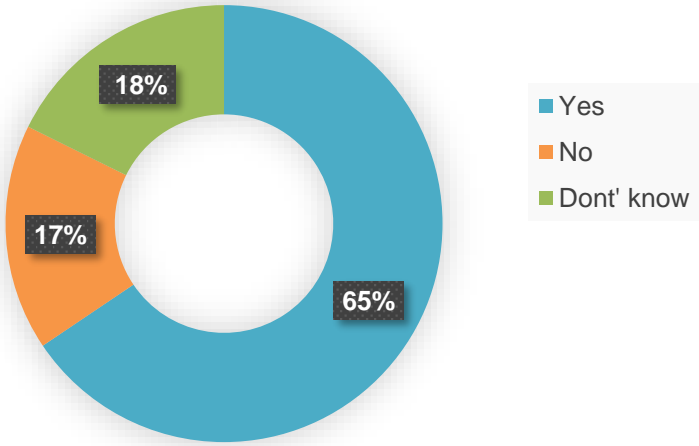
HEIs and public policy development

Two-thirds of HEIs reported that their senior management and faculty have been consulted by public or government officials in the context of public policies relating to COVID-19, while 17% replied that they were not and in the remaining 18% of cases the respondents did not know. (Fig.8)

This result is encouraging as it indicates that the role of HEIs in society is acknowledged and stresses that there is a good relation between the higher education community and governments.

One of the hopes for the higher education community is that the COVID-19 crisis will also work as a wake-up call for society and demonstrate the importance of research and expertise of HEIs, even their overall role for society and in society. Hope as well is that it will help counterbalance the recent trend of expert bashing and post-truth, which has been growing in many countries of the world in recent years.

Fig. 8: Have members of your senior management and faculty been consulted by public or government officials in the context of public policies relating to COVID-19?



Regional analysis

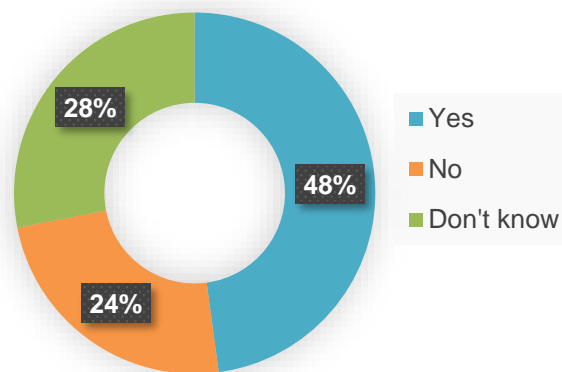
At regional level, Africa is diverging from the other regions of the world. Half of African HEIs reported that their senior management and faculty have been consulted by public or government officials in the context of public policies relating to COVID-19, a lower percentage than the ones in the other regions (68% in the Americas - 69% in Europe and 71% in Asia & Pacific).

In Africa one quarter of HEIs reported that their senior management and faculty were not consulted. This percentage is double compared to the Americas (12%) and higher than the ones in Asia & Pacific (19%) and Europe (14%). This point could be investigated further in the subsequent iterations of such a Survey.

Government support

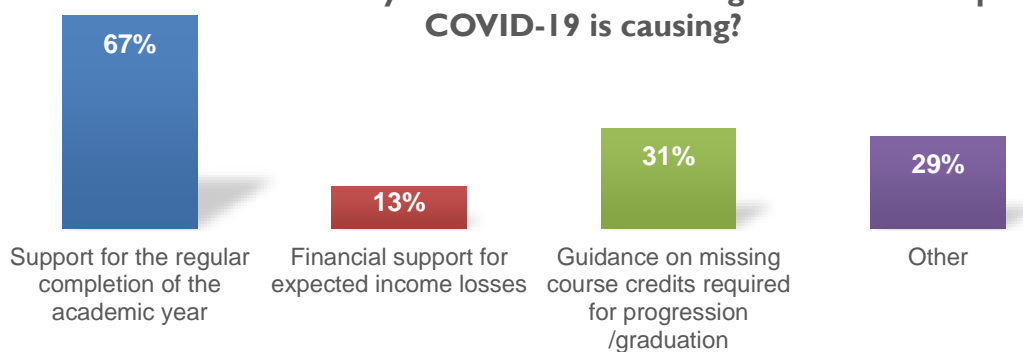
Almost half (48%) of respondents indicated that their government/ministry of education will support their institution with regard to the disruption COVID-19 is causing; one quarter indicated that their government/ministry of education will not and the rest do not know. (Fig.9).

Fig.9: Has your government/ministry of education indicated it will support your institution with regard to the disruption COVID-19 is causing?



In terms of type of support, the most common one is related to the completion of the academic year; three quarters of HEIs indicated that their government/ministry of education will provide this type of support. Other types of support are far less common. In particular, financial assistance for expected (and unexpected) income losses has been indicated only by 13% of HEIs. (Fig.10)

Fig.10: What kind of support has your government/ministry of education offered your institution with regard to the disruption COVID-19 is causing?



Regional analysis

At regional level, Europe is the region with the highest percentage of HEIs indicating that their government/ministry of education will support their institutions (53%). On the other hand, Africa is the region with the lowest percentage (39%); this is only slightly higher than the percentage of HEIs that reported that their government/ministry of education will not support their institutions (31%).

Results for Asia & Pacific and the Americas are more similar to the European than the African ones. However, the percentage of HEIs in the Americas reporting that their government/ministry of education will not support their institutions is similar to the one in Africa (29%).

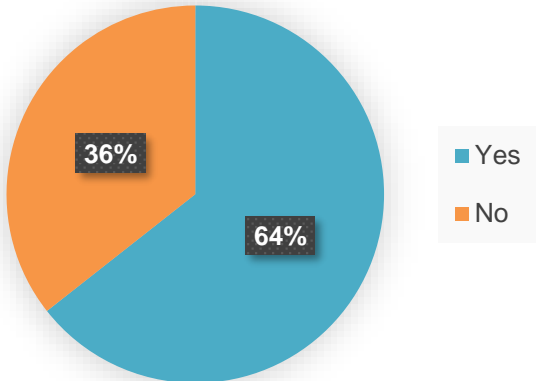
In terms of types of support, assistance for the completion of the academic year is the most common as confirmed by three-quarters of respondents in Africa and Europe. This is also the most common type of support provided in Asia & Pacific, with 62% of HEIs ticking this box in the Survey, and in the Americas, where it has been selected by 41% of HEIs only.

Guidance on how to mitigate missing course credits required for progression/graduation is the second most common kind of assistance provided in Asia & Pacific (41%), Europe (34%) and the Americas (34%). Only 11% of HEIs in Africa ticked this box in the questionnaire.

Effect of COVID-19 on partnerships

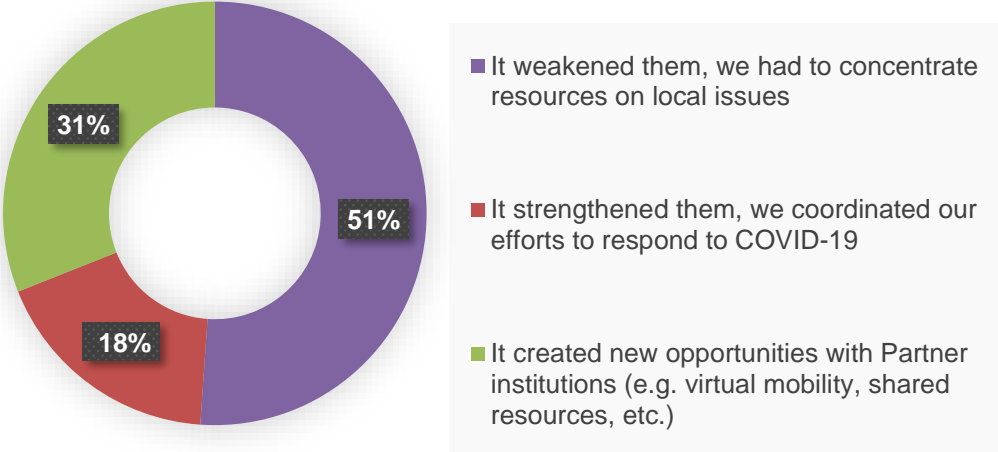
COVID-19 seriously affects university partnerships as is reported by 64% of responding HEIs. (Fig.11).

Fig. 11: Has COVID-19 affected your partnerships?



Half of HEIs that reported that their partnerships were affected by COVID-19, also reported that COVID-19 weakened their partnerships; against only 18% that reported that it strengthened them. At the same time, 31% of the HEIs reported that the COVID-19 pandemic created new opportunities with partner institutions. (Fig.12).

Fig.12: How has COVID-19 affected your partnerships?



Regional analysis

At regional level, and between regions, the variation of the percentage of HEIs for which partnerships are impacted is not very high. The following can however be underlined:

In Africa, 73% of HEIs reported that the effect of COVID-19 was negative, and that it weakened existing partnerships. This percentage is much higher than in all other regions (47% in Europe, 44% in Asia & Pacific and 41% in the Americas).

Asia & Pacific is the region with the highest percentage of HEIs reporting the creation of new opportunities (44%), a higher percentage than in all other regions and especially when compared to Africa (14%).

In Asia & Pacific (44%) and Europe (34%), COVID-19 generated new opportunities rather than strengthening the existing partnership (Asia & Pacific 13% - Europe 19%). In the Americas, the percentage of HEIs reporting on the two positive effects is similar (32% new opportunities and 27% strengthening existing partnerships).

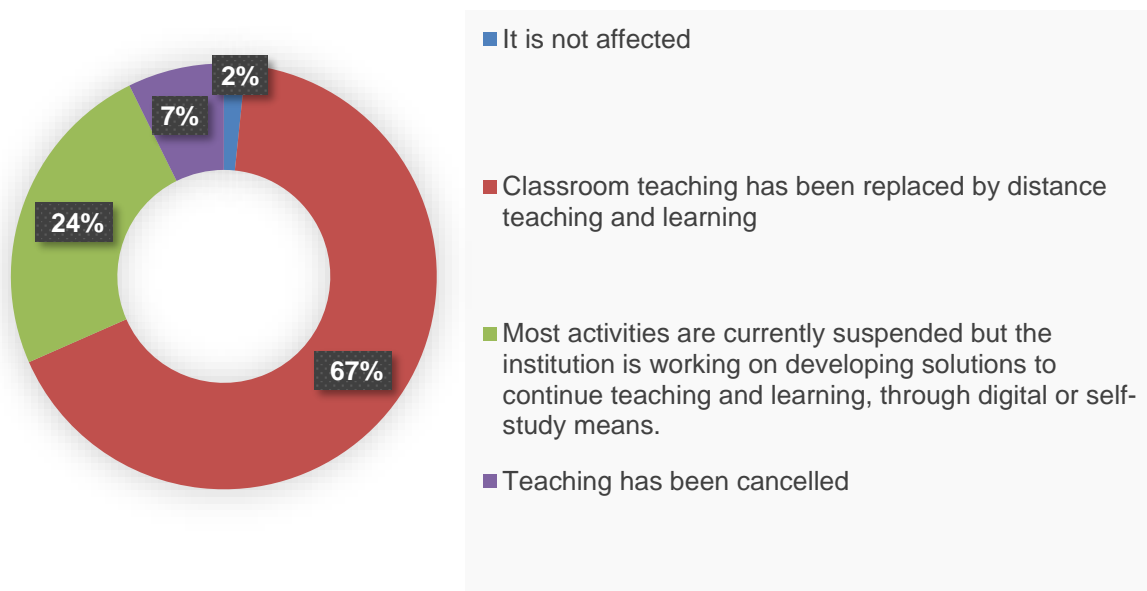
COVID-19: Effect on teaching & learning

At almost all HEIs, COVID-19 affected teaching and learning, only 2% of HEIs (7 HEIs) reported that teaching and learning is not affected. It is important to mention that 4 of the 7 HEIs that reported no effect on teaching and learning are virtual universities and 1 replied that the campus is open as usual, while the other 2 are traditional brick and mortar universities and replied that their campuses were closed. The fact that these two HEIs replied that teaching and learning is not affected, despite their campuses being closed, is surprising.

Two-thirds reported that classroom teaching has been replaced by distance teaching and learning and one quarter that most activities are currently suspended but the institution is working on developing solutions to continue teaching and learning, through digital or self-study means.

Only 7% reported that teaching has been cancelled. (Fig. 13)

Fig. 13: How has COVID-19 affected teaching and learning?



These results show that two-thirds of HEIs were able to move teaching online while one third was not. However, the majority of these HEIs are working on developing solutions to continue teaching online. Of course, this result is hard to generalise for all HEIs in the world, as there might be an implicit bias of self-selection in the respondents of the survey (HEIs that replied to the survey might be more technologically advanced), but it is encouraging to see that HEIs were prepared or are reacting quite quickly to continue teaching and to provide learning opportunities to their students. This is also confirmed by papers being published around the world on the current crisis digitalisation of higher education.

At a later stage IAU will analyse the impact of the current digitalisation of higher education on the quality of teaching and learning, as the exact consequences of what is also called emergency digitalisation cannot yet be analysed properly at this stage, especially at such a large scale.

Regional analysis

The results of the regional analysis are reported in the table below.

Table 2: Impact on teaching and learning by region

	Not affected	Classroom teaching replaced by distance teaching and learning	Teaching suspended but the institutions is developing solutions	Teaching cancelled
Africa	3 %	29 %	43 %	24 %
Americas	3 %	72 %	22 %	3 %
Asia & Pacific	1 %	60 %	36 %	3 %
Europe	Almost zero	85 %	12 %	3 %

The table clearly shows that the percentage of HEIs at which teaching has been cancelled is very low in all regions except in Africa, where it is currently reported to be at 24%. Africa is also the only region where teaching has been suspended or cancelled at the majority of higher education institutions. Only 29% of African HEIs were able to quickly move teaching and learning online, compared to 85% of HEIs in Europe.

Two-thirds of African HEIs were not prepared to move teaching online and when they closed their campuses they had to suspend teaching. Fortunately, the majority of them are currently working on developing solutions to continue teaching and learning, through digital or self-study means. However, there is still one quarter of African HEIs for which teaching is completely cancelled. If this situation will last long, it will have a major negative impact on the learning opportunities for students.

More information on the effect of COVID-19 on teaching and learning challenges and opportunities was provided by the respondents in the open questions.

Emergency distance teaching and learning: challenges and opportunities

Most of the institutions have been confronted with a sudden and unprepared shift to online teaching to respond to the need to continue teaching and learning activities and to engage and motivate students when social distancing measures are in place. The transition can be decomposed into several interconnected dimensions that impact the feasibility and the quality of the distance learning provided, namely:

- a. *Technical infrastructure and accessibility*
- b. *Distance learning competences and pedagogies*
- c. *The field of study.*

A. Technical infrastructure and accessibility

Infrastructure and online access are a prerequisite for shifting to distance teaching and learning. Two different trends can be identified in the responses.

On the one hand, the survey allowed identifying HEIs unable to move to online provision because their students simply do not have access to the Internet from home, in particular in Africa, but also in other low- and middle-income countries. In these cases, where lock-down or social distancing measures are in place, teaching and learning is fully disrupted and it seems unrealistic for those students to be able to complete the academic year.

On the other hand, the Survey allowed identifying a second group of HEIs situated in countries with good internet penetration. Noteworthy is that even in these cases institutions explained that they did not necessarily have a technical infrastructure in place or technical tools available that are required to optimize distance learning. Some referred to the financial implications of investing in tools and online licenses.

Finally, there are those HEIs for which, within the same institution, there is a divide between students who have access to the internet and students who do not, making it difficult to provide equal opportunities for students to complete their academic year. Some institutions have decided to fully interrupt their activities during the lockdown because they would not be able to reach the majority of their students through distance teaching. One interesting solution to this problem, pursued by one of the institutions, was to provide and distribute technical material (tablets or phones) to students to minimize disruption.

B. Distance learning competences and pedagogies

Several respondents referred to the fact that a different pedagogy is required for distance teaching and learning and that it is a challenge for faculty to seamlessly make this sudden and unprepared shift from face-to-face to distance teaching and learning. The level of readiness or preparedness of teachers to lift this challenge is very diverse. Yet, although continuing education to the best extent possible may not guarantee the same level of quality compared to face-to-face education as initially planned for the semester, it is reported to still be better than providing no education.

Institutions reported to not necessarily have a management structure in place to develop the teaching capacities of staff in order for them to shift towards online learning easily and this therefore often resulted in “learning by doing” approaches or attempting to imitate what would have been the face-to-face way of proceeding, yet using distance mode.

C. The field of study

Reliance on specific technical equipment varies from one field of study to another. This is therefore another important challenge reported with regards to distance teaching and learning, particularly from respondents stressing the limitations of distance learning in some fields of study.

Clinical medicine, veterinary studies, and several disciplines depending on access to laboratories were some of the few examples of studies given by respondents where practice cannot be replaced by distance teaching and learning.

This very issue holds true as well for many of the creative areas such as arts, music and design disciplines as students cannot perform well when working from home where they do not have access to the required equipment. Indeed, practice in and with orchestras for instance cannot be substituted at the same level by practicing in isolation.

Performing the more practical aspects of a study is a challenge and the teaching provided during the lockdown is often limited to the theoretical dimension of the curriculum. So even

within institutions where technical infrastructures enabling online teaching and learning is reliable, where faculty is ready to adapt to the change of mode of delivery, the maintenance of the quality of the learning experience will depend very much from one discipline of study to the other in the current context marked by constraining social distancing measures.

The open responses allow concluding that the quality of the distance teaching provided in response to the emergency situation varies a lot, depending on the infrastructure in place, the capacities of teaching staff to adapt to online teaching and on the field of study. The existence of technical infrastructure is a necessary prerequisite for ensuring adequate distance teaching and learning. Unsurprisingly, those HEIs operating in areas with unreliable infrastructures experience more hardship during this crisis. Similarly, those students who do not have the necessary access to online communication tools and the internet will be hardest hit. The current crisis will further exacerbate already existing inequalities.

Opportunities related to the shift to distance learning

Many of the respondents see the experience of working and teaching from distance as an important opportunity to learn from this exceptional situation and to propose more flexible learning possibilities, explore blended or hybrid learning and mixing synchronous learning with asynchronous learning.

This unplanned and unprepared experiment in distance teaching and learning has led to capacity building of staff and faculty who have learned and tested new tools and systems to enable distance teaching and learning. It is therefore possible that a shift in mindset is happening or that this experience has opened a new horizon of opportunities for teaching and learning. Respondents believe that this will offer a push forward in terms of exploring the potential of flexible learning and more acceptance for online learning to become a more integral part of study plans. Some respondents expect to see an increase in innovation in the field of teaching pedagogies as well as delivery modalities of teaching and learning.

Many respondents also mention that the learning assessment and examination approaches will be reviewed in order to build on the experience.

Institutions may choose to invest further in technical infrastructures to enable this shift from management learning systems to cloud services, to digitalisation of administrative processes and of access of documents, resources and libraries.

This will ultimately also enhance the opportunities for working from distance and the opportunity for learners to access lifelong learning opportunities. Some respondents indeed highlighted that this experience will generate a more accepted view on working from home.

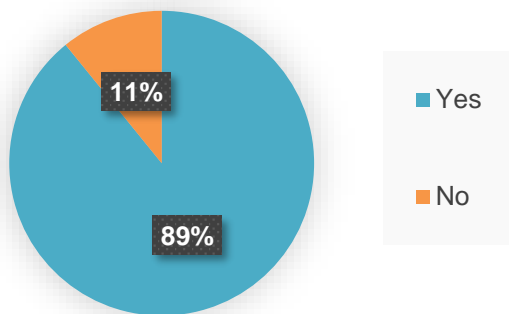
Time will show to what extent these opportunities will be explored or whether there will be a return to business as usual. The next IAU global Survey on the impact of COVID-19 on HE is to monitor such development. This second Survey is planned for October 2020.

As well, the current situation will impact the Policy Statement on HE and technology that IAU is developing and which will outline the key principles and values that must underpin the digital transformation in higher education. Work on the Statement was initiated in 2018 and will be finalised post COVID-19.

Impact on international student mobility

COVID-19 has had an impact on international student mobility at 89% of HEIs that responded to the survey. (Fig.14).

Fig.14: Has there been an impact of COVID-19 on international student mobility?



In Europe, almost all HEIs have been impacted (95%). Percentages are also high in the Americas (91%) and in Asia & Pacific (85%), a bit lower in Africa (78%).

It is interesting to note that 68% of the HEIs that reported that international student mobility has not been impacted by COVID-19 also reported that the institution is completely closed. In Africa, this percentage is as high as 80%.

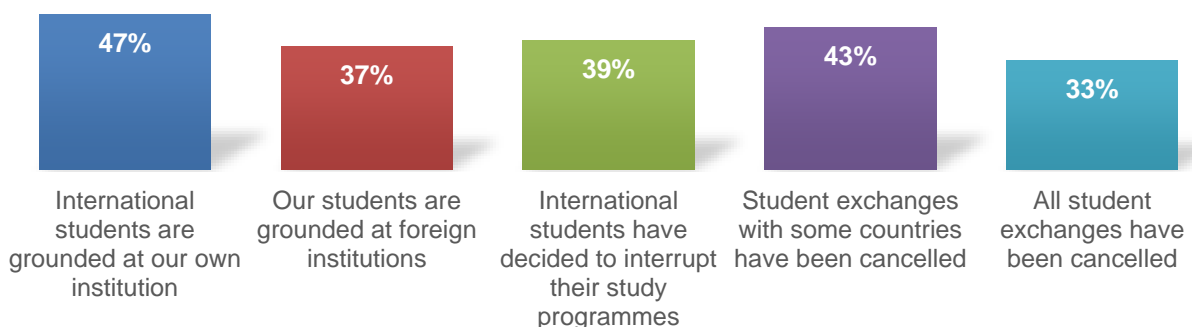
At first sight, this result is illogic. One possible explanation could be that this group of institutions did not have international

student mobility at all, but since the question on international student mobility was compulsory and allowed only for a yes/no answer, they chose to reply no.

However, this is only a hypothesis that would need further research to be verified.

The type of impact of COVID-19 on international student mobility is diverse and varies from institution to institution with none of the options listed in the survey being present at the majority of institutions, as illustrated in Fig.15 below.

Fig. 15: What is the impact of COVID-19 on international student mobility



Regional analysis

The type of impact of COVID-19 on international student mobility is equally diverse and varied at the level of the four regions. Only in Europe is the option “International students are grounded at our own institution” present at more than half of HEIs (53%). This is the most common impact signalled by HEIs based in Africa (but at a lower percentage of HEIs, 38%), in Asia & Pacific (at 45% of HEIs where it is at the same percentage as for “Student exchanges with some countries have been cancelled”), while in the Americas it is the third most common one (present at 40% of HEIs).

The most common impact in the Americas is “Student exchanges with some countries have been cancelled” (at 49% of HEIs).

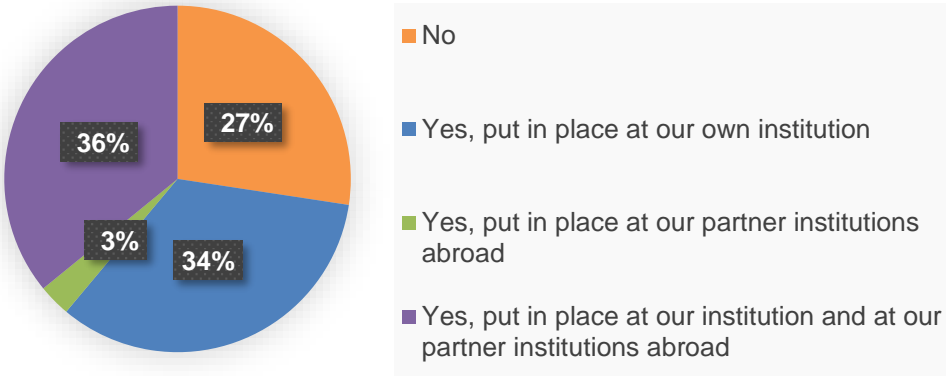
The responses to the open questions confirm that the current crisis has a significant impact on international mobility and recruitment of international students and provide further information about this specific issue. Several HEIs mention that they foresee a decrease in the number of incoming international students and some also highlight that this will impact the revenue of the institution. Consequently, the current situation will have an important impact on the internationalization strategies of institutions.

Contingency plans to mitigate the impact of COVID-19 on international student mobility

HEIs that replied that COVID-19 had an impact on international student mobility were asked if they had contingency plans in place to mitigate this impact.

Contingency plans are in place either at their institution, at partner institutions abroad, or at both for 73% of the HEIs; 36% reported that contingency plans are in place both at their institutions and at their partner institutions abroad; 34% replied that they are in place only at their own institutions and 3% that they are in place only at their partner institutions. (Fig.16).

Fig. 16: Are any contingency plans in place?



Regional analysis

At regional level, the situation is somehow similar in the Americas, Asia & Pacific and Europe, where 19%, 24% and 23% of HEIs reported that no contingency plans are in place. However, for Africa the percentage is as high as 50%. Only 11% of African HEIs reported that contingency plans are in place at their partner institutions abroad (either exclusively or in combination with contingency plans at their own institutions).

This percentage is surprisingly low and might denote more of an absence of knowledge of the existence of contingency plans at partner institutions abroad, rather than a real absence. In fact, this result is not consistent with the fact that 45% of HEIs in Africa and more than 72% in all other regions reported that contingency plans are in place at their own institutions.

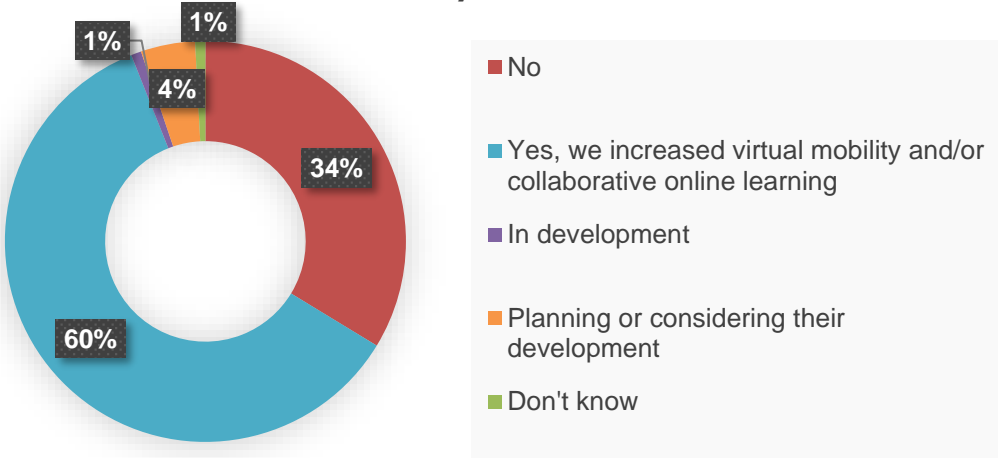
Overall, HEIs seem to have reacted to the emergency caused by COVID-19 and adopted contingency plans to provide solutions for international students.

Yet, the fact that in more than a quarter of HEIs this has not happened, might leave (or have left) many international students in a difficult situation. This is especially worrisome in Africa, where half of HEIs have no contingency plans in place.

Alternatives to physical student mobility

Due to COVID-19, virtual mobility and/or collaborative online learning has increased at 60% of HEIs; 5% are either developing or considering/planning their development and one third replied that COVID-19 has not stimulated the creation of any alternative to student mobility. (Fig. 17)

Fig. 17: Has COVID-19 stimulated alternatives to physical student mobility?



Regional analysis

Asia & Pacific is the region with the highest percentage of HEIs that increased virtual mobility and/or collaborative online learning; three quarters of them have done so. In Europe, this percentage is as high as 59%, in the Americas 56% and in Africa 49%.

In Africa, the percentage of HEIs that have not increased virtual mobility and/or collaborative online learning is 44%, just a bit less than the one for those who have done it. Once more Africa is the region for which a shift from physical to virtual mobility seems to be the most difficult. This could be linked to the problem of access to technical infrastructure as reported earlier.

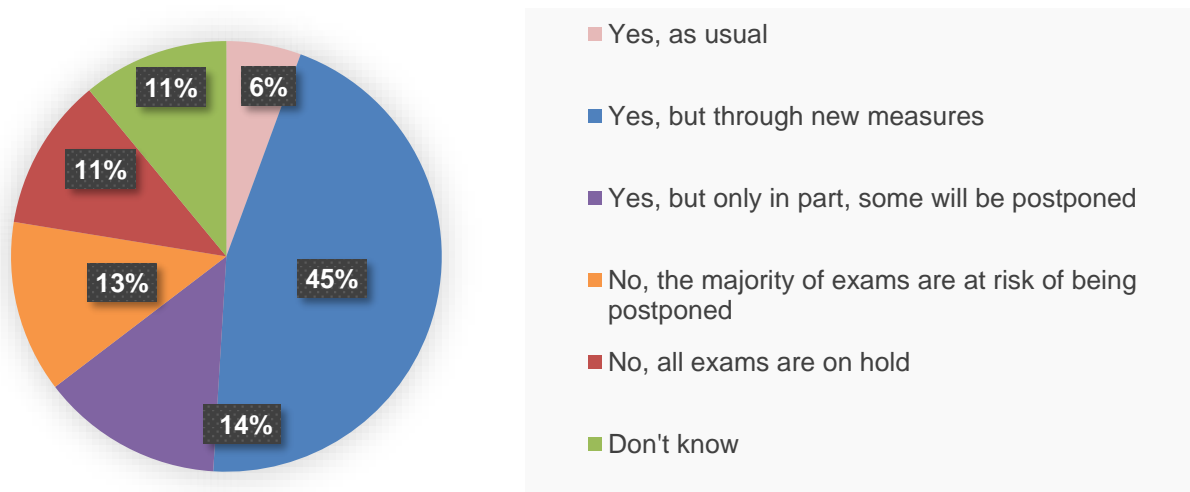
In the open questions, respondents mentioned that the enhancement of the digital infrastructure and the shift to more blended and online learning would increase the opportunities for online mobility both in terms of incoming and outgoing mobility for students as well as academics.

Some respondents also indicated that as the number of international students is likely to decrease at least in the short term, it is an opportunity to further develop internationalization at home.

Planning of exams for the semester

A bit more than half of the HEIs are planning to carry out exams for the semester as planned, although the majority of them through new measures and only 6% as usual. That said, 14% plan to carry out only part of the planned exams, while others will be postponed. At about one quarter of HEIs, exams will be postponed or are on hold at the moment (see Fig.18 below).

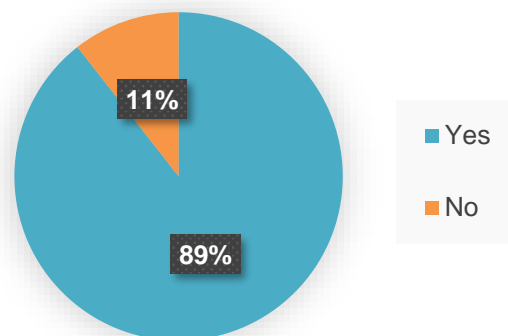
Fig. 18: Do you expect to be able to carry out exams as planned for this semester?



At 89% of HEIs, strategies are being discussed to address the planning of exams for the semester. (Fig.19)

It is interesting to note that at more than half of the 11% of HEIs which are not discussing strategies for the planning exams for the semester, exams are either being postponed or on hold. This is a worrying signal for this group of HEIs, because it means that students are left without the possibility of taking exams and at risk of losing time, while no solution is being discussed.

Fig. 19: Are strategies being discussed to address the above issue of exams?



Regional analysis

Europe is the region with the highest percentage of HEIs planning to carry out exams for the semester – 80% of European HEIs plan to do so. Among them, 56% plan to do that through new measures, 5% as usual and 19% only for some exams. Only at 8% of European HEIs are exams either postponed or on hold.

The situation is completely different in Africa, where at 61% of HEIs exams are at risk of being postponed (34%) or on hold (27%) and only 32% of HEIs are planning to carry on exams for the semester (18% through new measures, 6% as usual and 8% only in part).

Asia & Pacific and the Americas are in a situation between these two extremes, but more similar to the European one.

In the Americas, 69% plan to carry out exams. Among them, 51% plan to do that through new measures, 8% as usual and 10% only for some exams. At 8% of American HEIs, exams are postponed and at another 8% they are on hold.

In Asia & Pacific, 62% plan to carry out exams. Among them, 46% plan to do that through new measures, 6% as usual and 10% only for some exams. At 13% of Asian HEIs, exams are postponed and at 17% they are on hold.

At almost all HEIs in Asia & Pacific (98%) strategies are being discussed to address issues relating to final exams. The percentage of HEIs discussing strategies is very high also in the Americas (92%) and in Europe (94%), a bit less in Africa (73%).

Unfortunately, the 27% of African HEIs that are not discussing strategies to ensure exams can take place are also in a situation for which exams are mainly on hold (57% of them) or postponed (33%). Again, this is worrying, as it means that students are left without the possibility of taking exams and at risk of losing time to complete their studies.

The open questions provide more information on how exams are being envisaged or not and on the overall planning of the academic calendar. The challenges reported relate to the important disruption to the 'normal' management of the exams and to what extent it is feasible to complete the semester, holding or reorganizing exams, as well as planning for the next academic year or following semester.

A. Completing the semester?

Many of the respondents were concerned that it will not be possible to complete the semester as planned or not even by the end of 2020. Some highlighted that it is a challenge to ensure that 2020 does not become a blank or lost year, but that the current disruptions are interfering with the academic schedule, plans and procedures.

Some comments related to how to make up for time lost in order to complete the academic year; many expressed concern that the year will be void or delayed into the next semester.

B. Foreseeing exams

Holding exams to ensure that students complete the semester and obtain the planned credits was identified as a major concern by many of the respondents. Some indicated that their HEI was examining possibilities to conduct some exams at a distance, others planned on delaying exams.

For some, the legal implications related to ensuring that the exams would be conducted within the regular timeframe or to what extent it is possible to explore alternative ways of assessing the students' learning outcomes in order to finalize the semester were a real challenge with no clear answers.

C. Planning the next academic year

Planning for the next semester comes with a high level of uncertainty - when or whether it will be possible to resume regular face-to-face teaching or whether distance teaching will be continued. In general, the high degree of uncertainty makes it complicated to plan for the following semester and the situation requires additional contingency measures.

One of the consequences of the high level of pressure on staff to work around the clock to find solutions in order to cope with this exceptional situation is increased risk of burnout; this is a concern that was expressed strongly in the comments.

COVID-19 impact on research

As much as 80% of HEIs have responded to the survey reported that research at their institutions has been affected by the COVID-19 pandemic. (See Fig.20)

The situation is almost the same in all regions, with Africa having a slightly higher percentage of HEIs affected than all other regions (85% vs. 79%).

The most common impact of COVID-19 on research has been the cancelling of international travel (at 83% of HEIs) and the cancellation or postponement of scientific conferences (81% of HEIs).

Scientific projects are in danger of not being completed at a bit more than half of HEIs (52%), while at 21% of HEIs scientific research has completely stopped. (Fig.21)

Fig. 20: Has COVID-19 affected research at your institution?

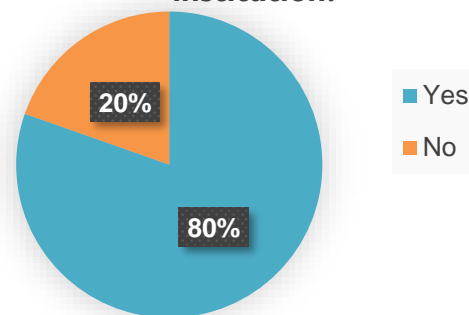
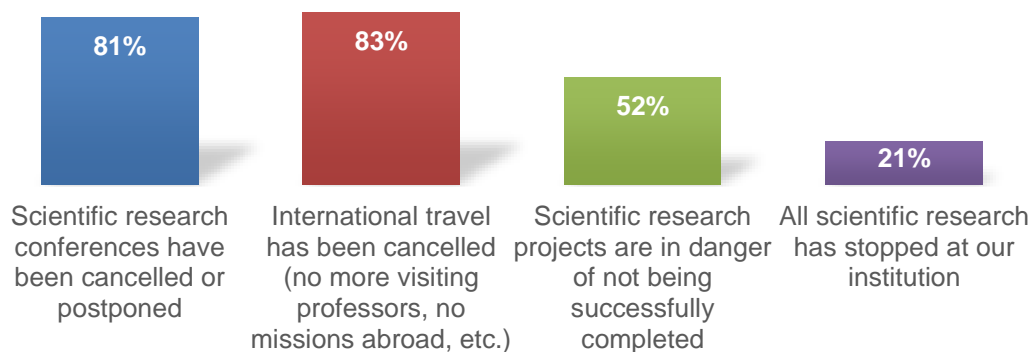


Fig. 21: How has COVID-19 affected research at your institution?



Regional analysis

Scientific conferences and international travels are the most affected in all regions, although with different percentages of HEIs in different regions. International travel has been cancelled for 93% of European HEIs, 85% of HEIs in Asia & Pacific, 74% for American HEIs and 68% of African HEIs.

The same trend is visible for scientific conferences, cancelled for 88% of European HEIs, 81% of HEIs in Asia & Pacific, 78% of American HEIs and 68% of African HEIs.

Scientific projects are in danger of being successfully completed at about half of HEIs in all regions, with no substantial variations from one region to another.

Africa is the region that has suffered the most when it comes to research activities – they are reported to have been stopped at 43% of HEIs. The same has happened at 31% of HEIs in Asia & Pacific, but only at 12 of HEIs in the Americas and even less in Europe (9%).

It might be surprising that at the same time Africa is the region with the highest percentage of HEIs where research has completely stopped and with the lowest percentage of HEIs where scientific conferences and international travel have been cancelled.

A possible explanation is that at the time of the survey, Africa was the continent least affected by COVID-19, with some countries that had yet to report any COVID-19 case. At the same time, Africa is also the region where many governments adopted preventive measures quite early. This could mean that at the time of the survey there were two different groups of HEIs, one group based in countries not yet touched massively by COVID-19 where conferences and international travel was still possible and another group, where restrictive measures were already in place.

Moreover, as seen already in previous questions, Africa is probably the region where HEIs are the least prepared and with the lowest amount of resources to face the crisis. Therefore, while in other regions HEIs are able to continue projects and research thanks to having solutions in place and infrastructures that allow having them, at many African HEIs COVID-19 caused a complete stop of all institutional activity.

In the open questions, respondents confirmed that impacts on research is a key challenge. They stressed that much research has been put on hold and that staff cannot access the necessary laboratories. Others referred to the fact that this crisis may lead to a reorientation of research and more focus on health and societal issues in general.

In terms of opportunities, some respondents believed that the current crisis would lead to an increase in funding for research particularly in relation to strengthening health systems, but also in relation to the socio-economic and cultural impacts of the current crisis. More scientific knowledge is required in order to better understand and respond to the current pandemic but also in the future to respond to similar and other crisis, to develop disaster management and develop more knowledge about unknown pathogens. Research on climate change and the inequalities following this crisis were also mentioned as to be researched further in the future.



Involvement in COVID-19 research and contribution by researchers to public policy

Only 41% of HEIs are involved in COVID-19 research (Fig.22).

At 86% of these institutions involved in COVID-19 research, the researchers also contribute to public policy (Fig. 23).

Fig. 22: Is your institution involved in COVID-19 research?

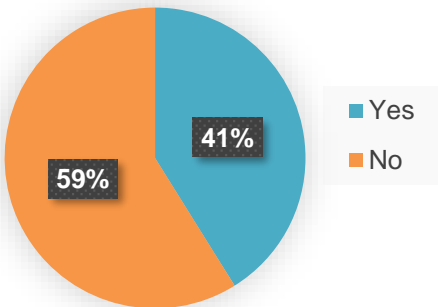
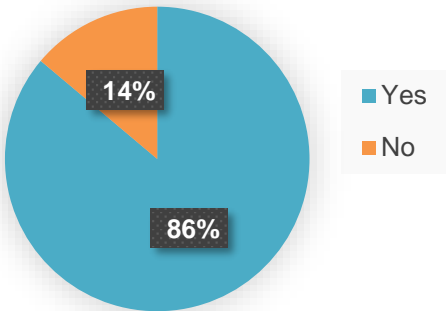


Fig. 23: Do researchers at your institution contribute to public policy on COVID-19?



This means that HEIs conducting COVID-19 research are recognised by their respective governments as a source of relevant expertise and are therefore consulted.

It is interesting to note that there is no perfect match between HEIs that replied that their researchers contribute to public policy on COVID-19 and HEIs that replied that their senior management and faculty have been consulted by public or government officials in the context of public policies relating to COVID-19.

Six groups of HEIs can be identified:

1. HEIs whose senior management and faculty have been consulted by public or government officials in the context of public policies relating to COVID-19 and whose researchers contribute to public policy on COVID-19 (26%);
2. HEIs whose senior management and faculty have been consulted by public or government officials in the context of public policies relating to COVID-19 but whose researchers do not contribute to public policy on COVID-19, despite conducting research on COVID-19 (2%);
3. HEIs whose senior management and faculty have been consulted by public or government officials in the context of public policies relating to COVID-19, but which do not conduct research on COVID-19 (35%) or have not replied to that question (2%);
4. HEIs whose researchers contribute to public policy on COVID-19 but whose senior management and faculty have not been consulted by public or government officials in the context of public policies relating to COVID-19 (3%) or don't know (5%);
5. HEIs whose senior management and faculty have not been consulted by public or government officials in the context of public policies relating to COVID-19 (or don't know) and whose researchers do not contribute to public policy on COVID-19, despite conducting research on COVID-19 (4%);

6. HEIs whose senior management and faculty have not been consulted by public or government officials in the context of public policies relating to COVID-19 (or don't know) and which do not conduct research on COVID-19 (21%) or have not replied to that answer (2%).

HEIs of group 1, which constitute about a quarter of all respondents, are considered important stakeholders by their governments for public policies, both as institutions as such which need to be consulted and for their expertise in research.

HEIs of groups 2 and 3, which constitute almost 40% of all respondents, are also considered important stakeholders by their governments for public policies as institutions as such, even if they do not conduct research on COVID-19.

HEIs of group 4, which constitute a minority (8%), are considered important stakeholders but only as far as their research on COVID-19 is concerned.

Finally, HEIs of groups 5 and 6, which constitute a bit more than another quarter of all respondents, are not considered important stakeholders by their governments and do not contribute to public policies.

Overall, almost three quarters of institutions are contributing to public policies either through their institutional leadership or through their researchers. This is a very interesting result pointing out the importance of higher education for society.

Regional analysis

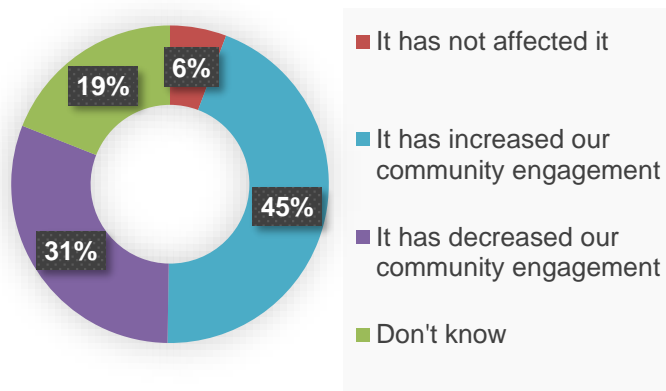
HEIs in the Americas are those most involved in research on COVID-19 - more than half of them (58%) are involved. On the other hand, HEIs in Europe are the least involved in research on COVID-19, only one third of them (33%) are involved. A bit less than half of HEIs in Asia & Pacific (43%) and in Africa (45%) are involved in research on COVID-19

In the Americas, almost all HEIs whose researchers are involved in research on COVID-19 contribute to public policy (92%). The percentage of HEIs whose researchers are involved in research on COVID 19 and contribute to public policy is high also in the other regions (Africa 88%, Asia & Pacific 86% and Europe 82%).

Impact on community engagement

For the large majority of HEIs, COVID-19 had an impact on community engagement. At a bit less than half of them, the impact was positive - the crisis increased HEIs' community engagement, whereas at a bit less than one third the impact was negative - it decreased HEIs' community engagement. (Fig. 24)

Fig. 24: How has COVID-19 impacted on your community engagement?



Regional analysis

The Americas is the region where COVID-19 had the most positive impact on community engagement - respondents indicated that it increased at 56% of HEIs and decreased at 23%. The similar effect was reported for Europe with increased community engagement at 46% of HEIs and a decrease of such engagement at 26% of responding HEIs.

In Africa, there are almost two equal groups of HEI, those for which their community engagement increased

during this COVID-19 period (37%) and those for which COVID-19 decreased their community engagement (34%).

On the other hand, in Asia & Pacific the effect of COVID-19 on community engagement was mainly negative, causing a decrease at 48% of HEIs and an increase at 39%.

Community engagement activities in the context of COVID-19

More than half of HEIs are carrying out community engagement activities in the context of COVID-19. (Fig.25)

Activities are diverse and vary from one institution to the other with almost none of the options listed in the survey being present at the majority of institutions, as illustrated in Fig.26.

Fig. 25 Are you carrying out activities in the context of COVID-19?

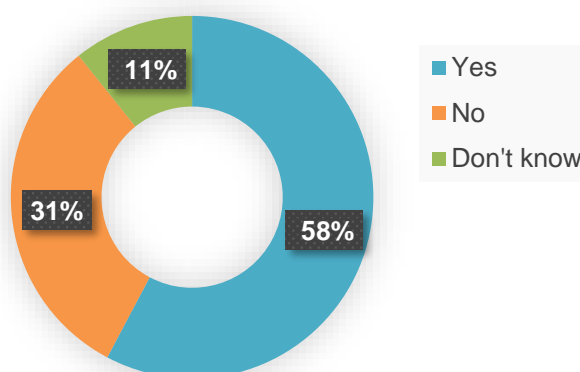


Fig. 26: Which activities are carried out?



Regional analysis

The Americas is by far the region with the highest percentage of HEIs carrying out community engagement activities in the context of COVID-19 (79%).

In the three other regions, about half (or a bit more) of HEIs are carrying out community engagement activities (Africa 50%, Asia & Pacific 58%, Europe 54%).

The most common activity in the Americas are community actions, which increased at 59% of HEIs.

Community actions are also the most common activity in Asia & Pacific, with 54% of HEIs reporting an increase in these actions, and in Europe with 48% of HEIs reporting an increase.

In Africa, a higher percentage of HEIs report an increase of community actions (53%), but this is only the second most common activity, the most common being science communication initiatives, developed at 60% of HEIs. Science communication initiatives were developed also at 51% of American HEIs, 47% of European HEIs and 41% of HEIs in Asia & Pacific.

Other key challenges and potential opportunities and changes

The majority of challenges and opportunities reported by respondents in the open questions were related to topics already analysed in the previous sections of the report. However, there were some more which are not linked specifically to any of the previous topics and which are reported in this section.

Financial implications

Many respondents referred to the financial implications as the most important challenge for their institutions.

Private higher education institutions in particular, but not only, expressed concerns with regard to tuition fee payments and a potential drop in student numbers in the next semester due to economic impacts of the current crisis but also due to the uncertainty surrounding the time when institutions will be able to return to a new kind of normal, where campuses will be reopened and face-to-face teaching provided again. Several respondents stressed that a decrease of student enrolment will have important financial implications for the institution.

Others are referring to the immediate financial impact on students that are not able to work and make a living, some are traveling back home to rural areas and may not be in a financial situation that will allow them to return to the institution and continue their studies, once the epidemic is over.

Finally, some respondents foresee a long term gloomy financial future with the financial aftermaths of the current health crisis and global recession to lead to a decline in student enrolment. This will therefore negatively affect the financial situation of the institutions. Although private institutions may experience the shortfall on revenue through lack of tuition fees, public institutions are equally concerned about potential reduction in public support as a consequence of the financial crisis that hits countries everywhere.

Improving crisis management readiness

Some respondents stressed that this experience offers an opportunity to better prepare their institution to deal with other or similar crises in the future. Although, in the short term, the institution is still coping with the urgency of the situation, it also can be seen as a different opportunity for institutions to learn about crisis management. It may lead to increasing the institution's resilience and agility when responding to unforeseen challenges in the future.

Conclusions

The Survey results illustrate the important degree of stress and constraint currently experienced by higher education institutions around the world. Almost all institutions that responded to the survey are affected in a way or another by the COVID-19 crisis and the crisis has affected all institutional activities.

Results show to what extent it is complicated to avoid complete disruption of the institution activities and how managing at a distance is possible to some extent, but might result negatively on the quality of the activities and on the other hand increase inequality of learning opportunities. The efforts put in place to prevent a void academic year, to ensure future planning despite the high degree of uncertainty, with the risk of decreasing private and potentially also public funding, demonstrate the incredible amount of pressure on higher education institutions to cope during the current crisis and at the same time their resilience and creativity.

Moreover, the regional analysis shows substantial differences between institutions in Africa and in the other regions. For instance in Africa the percentage of HEIs having completely cancelled teaching or postponed/cancelled exams is higher than in any other region. This is probably due to a lower degree of access to technology in Africa than in any other region, which also makes it difficult to implement alternatives to physical student mobility.

Africa is also the region reporting the biggest disruption on research and the least degree of support by and collaboration with governments, while at the same time being the region in which HEIs are reporting a negative effect of COVID-19 on international partnerships.

All of this points to a potential increased divide between HEIs in Africa and in the other regions of the world.

However, this risk of growing inequality is not only an African problem. The survey responses indicate that the risk for COVID-19 to increase inequality among HEIs is present also inside a specific geographical region. This is true for the access to technology, as well as for the financial dependence on student recruitment. It is also visible in the question on partnerships, to which in the Americas, Asia & Pacific and Europe almost half of HEIs replied that the COVID-19 period strengthened them or created new opportunities; the other half that it weakened them.

The same divide among different groups of HEIs can be seen also when it comes to community engagement.

The risk that the COVID-19 crisis will exacerbate already existing inequalities is something that the global higher education community has to address through cooperation with other societal stakeholders and especially with national governments.

On this topic, the results show that HEIs that conduct COVID-19 research are recognised by their respective governments as a source of relevant expertise and consulted.

Overall, almost three quarters of institutions are contributing to public policies either through their institutional leadership or through their researchers. This is a very interesting result as it stresses the importance of higher education for society, and the recognition of this importance by society.

The COVID-19 crisis is an opportunity for the higher education sector to demonstrate the importance of research and expertise available at HEIs around the world.

Hopefully, this recognition of the importance of research and expertise of HE by society will lead to the end of the recent trend of expert bashing and post-truth, which was growing in many countries of the world in recent years and to a post-COVID-19 world in which scientific evidence and knowledge will be again fundamental pillars of society.

However, this is not enough if the risk of inequality is not addressed. The only way to minimise this risk is through more collaboration between HEIs and between HEIs, governments, the private sector and society at large.

COVID-19 is a pandemic, a global challenge that can be overcome only thanks to the development of joint solutions at the global level for local implementation.

IAU hopes that the perceived importance of international collaboration in order to develop joint solutions to the current and future crisis will increase in the short, medium and long term⁴.

This might sound slightly offbeat at a time when the reaction most often triggered by the pandemic around the world has been the opposite one – it often triggered a fallback reaction, marked by initial border closure and isolationism. However, it is exactly this reaction itself, although necessary to slow down the spread of the COVID-19 disease that demonstrates its own infeasibility and even inappropriateness in the long term. No region, country, city, village, single citizen can be safe if the virus continues to spread, and the world cannot live in a lockdown for long, without facing dire socio-economic and even cultural consequences that might also generate other detrimental health emergencies.

The solution to a pandemic will come only through prevention and treatment. The quest for a vaccine will be more effective if done cooperatively, with different teams of scientists sharing their knowledge. The solution to the socio-economic crisis will come only through solidarity and a sense of community. The solution to the culture crisis is also to be solved together.

In both cases, the global higher education community has a major role to play at many different levels, including by setting the example to follow.

⁴ Cf. Universities must help shape the post-COVID-19 world, Ira Harkavy, Sjur Bergan, Tony Gallagher and Hilligje van't Land 18 April 2020, <https://www.universityworldnews.com/post.php?story=20200413152542750>

ANNEXES

Annex I

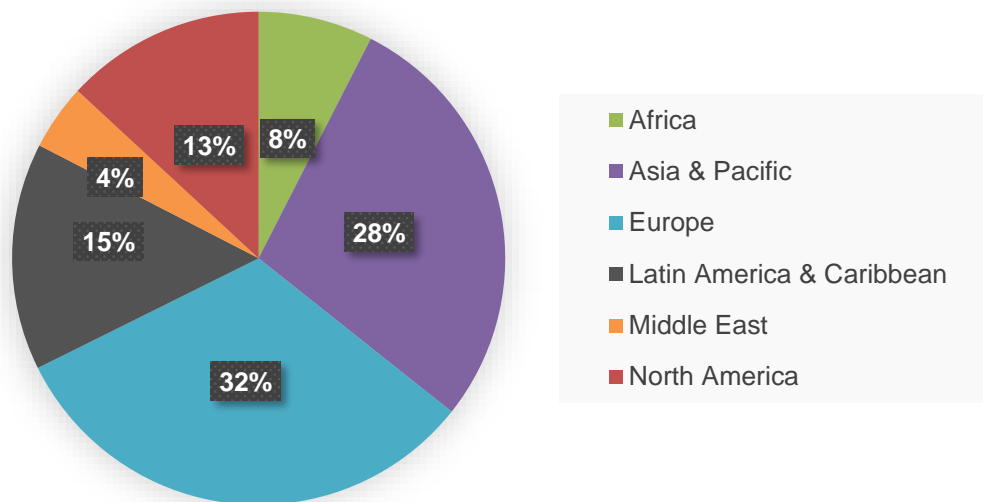
Classification of HEIs in the different regions of the world

At first, HEIs were classified, accordingly to their country of origin, in one of the six regions of the world, which are usually defined and used by IAU:

1. Africa
2. Asia & Pacific
3. Europe
4. Latin America & Caribbean
5. Middle East
6. North America

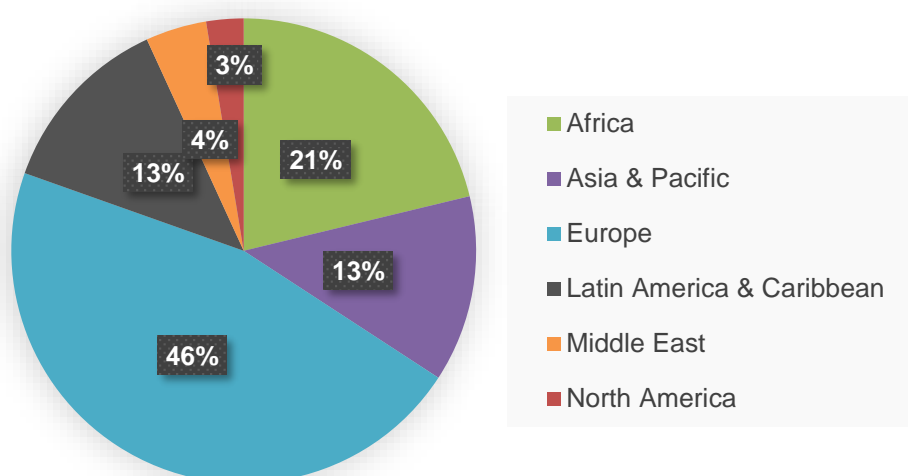
Fig. A1 represents the distribution of the 9 670 HEIs contacted through the WHED in these six regions of the world.

HEIs in WHED 6 regions



The distribution of the 424 full replies to the survey in the six world regions is represented in Fig.A2

Fig. A 2: Replies 6 regions



When comparing the distribution of replies in Fig.A2 with the one of HEIs in Fig.A1 it appears that the response rate of HEIs in the different regions of the world is not matched by those responding.

While HEIs in Africa and Europe replied more than the weight of the respective HEIs in the world distribution, HEIs in Asia & Pacific and North America replied less. The response rate of HEIs in Latin America and the Caribbean and in the Middle East is more or less in line with the weight of their HEIs in the world distribution.

However, while the number of 424 replies at world level is enough to be statistically relevant, the number of replies in some regions is not. More specifically, the number of replies in the Middle East and in North America is so low that it is not statistically relevant. This makes it impossible to categorise the replies in six regions of the world; replies from the Middle East and North America have to be included in other regions.

For this reason, HEIs from the Middle East are included in the Asia & Pacific region, while HEIs from North America are merged with the ones from Latin America and the Caribbean; together they are considered as the new region of 'the Americas'.

Therefore, the regions used in this report are only four:

1. Africa
2. Americas
3. Asia & Pacific
4. Europe

Annex II

Questionnaire

A. General information

* Name of Institution:

* Country:

* Position of the respondent to the Survey:

- Head of Institution (President / Rector / Vice Chancellor)
- Deputy Head of Institution (Vice-President / Vice-Rector / Deputy Vice-Chancellor /Chief Academic Officer / Provost)
- Registrar
- Dean
- Head of Department
- Head of International Office
- Staff member in International Office
- Faculty member
- Other (please specify)

B. General assessment of COVID-19 impact on your institution

* 1) How has COVID-19 pandemic affected your institution? (Please select only one)

- Our institution is open as usual, no special measures in place for COVID-19
- Our institution is open as usual, but containment measures have been put in place to avoid spread of COVID-19
- Our institution is partially open, but there are major disruptions
- All campus activities have stopped and the institution is completely closed.

* 2) Do you have infrastructure in place to easily communicate with students (and staff) for updates and information?

- Yes
- No

* 3) Do you believe COVID-19 will affect enrollment numbers for the new academic year?
(Please select only one)

- No
- Yes, but only for international students
- Yes, but only for local students
- Yes, both for local and international students

* 4) Have members of your senior management and faculty been consulted by public or government officials in the context of public policies relating to COVID-19?

- Yes
- No
- Don't know

* 5) Has your government/ministry of education indicated it will support your institution with regard to the disruption COVID-19 is causing?

- Yes
- No
- Don't know

* 6) What kind of support has your government/ministry of education offered your institution with regard to the disruption COVID-19 is causing? (Please select all that apply)

- Support for the regular completion of the academic year
- Financial support for expected income losses
- Guidance on missing course credits required for progression/graduation
- Other (please specify):

* 7) Has COVID-19 affected your partnerships?

- Yes
- No

* 8) How has COVID-19 affected your partnerships?

- It weakened them, we had to concentrate resources on local issues
- It strengthened them, we coordinated our efforts to respond to COVID-19
- It created new opportunities with Partner institutions (e.g. virtual mobility, shared resources, etc.)

C. Teaching and learning

* 9) How has COVID-19 affected teaching and learning? (Please select only one)

- It is not affected
- Classroom teaching has been replaced by distance teaching and learning
- Most activities are currently suspended but the institution is working on developing solutions to continue teaching and learning, through digital or self-study means.
- Teaching has been cancelled

* 10) Has there been an impact of COVID-19 on international student mobility?

- Yes
- No

* 11) What is the impact of COVID-19 on international student mobility? (Please select all that apply)

- International students are grounded at our own institution
- Our students are grounded at foreign institutions
- International students have decided to interrupt their study programmes
- Student exchanges with some countries have been cancelled
- All student exchanges have been cancelled

* 12) Are any contingency plans in place? (Please select only one)

- No
- Yes, put in place at our own institution
- Yes, put in place at our partner institutions abroad
- Yes, put in place at our institution and at our partner institutions abroad

* 13) Has COVID-19 stimulated alternatives to physical student mobility? (Please select one)

- No
- Yes, we increased virtual mobility and/or collaborative online learning
- Other (please specify)

* 14) Do you expect to be able to carry out exams as planned for this semester? (Please select one)

- Yes, as usual
- Yes, but through new measures
- Yes, but only in part, some will be postponed
- No, the majority of exams are at risk of being postponed
- No, all exams are on hold
- Don't know

* 15) Are strategies being discussed to address the above issue of exams?

- Yes
- No

D. Research

* 16) Has COVID-19 affected research at your institution?

- Yes
- No

* 17) How has COVID-19 affected research at your institution? (Please select all that apply)

- Scientific research conferences have been cancelled or postponed
- International travel has been cancelled (no more visiting professors, no missions abroad, etc.)
- Scientific research projects are in danger of not being successfully completed
- All scientific research has stopped at our institution

* 18) Is your institution involved in COVID-19 research?

- Yes
- No

* 19) Do researchers at your institution contribute to public policy on COVID-19?

- Yes
- No

E . Community Engagement

* 20) How has COVID-19 impacted on your community engagement? (Please select only one)

- It has not affected it
- It has increased our community engagement
- It has decreased our community engagement
- Don't know

* 21) Are you carrying out activities in the context of COVID-19?

- Yes
- No
- Don't know

* 22) Which activities are carried out? (Please select all that apply)

- Our university hospital provides care for affected people
- Our students and staff provide mobile care for affected people
- We provide medical advice & support
- We develop science communication initiatives
- We increase our community actions
- Other (please specify)

F. Future impact of COVID-19

23) In your opinion, what is the major challenge that your institution has encountered in light of the COVID-19?

24) In your opinion, what is the major opportunity and change that you believe will impact your institution in the future?



IAU Administrative Board, 2019

VISION

To contribute to peace and human development by promoting and enhancing the power of higher education to transform lives, build capacity, connect diverse peoples, generate and disseminate new knowledge, create insights and find sustainable solutions to local and global challenges.

MISSION

As the global voice of higher education, IAU will be the most influential and representative global association of diverse higher education institutions and their organisations, advocating and advancing a dynamic leadership role for higher education in society. Articulating the fundamental values and principles that underpin education and the pursuit, dissemination and application of knowledge, the Association will lead and advocate the development of higher education policies and practices that respect diverse perspectives promote social responsibility and contribute to the development of a sustainable future. IAU will be a think tank and forum for the development of new approaches, the sharing of best practice and the undertaking of joint action, encouraging and facilitating innovation, mutual learning and cooperation among higher education institutions around the world.



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In order to better understand the disruption caused by COVID-19 on higher education for the short, medium and long term, and to investigate the first measures undertaken by higher education institutions around the world to respond to the crisis, the International Association of Universities (IAU) launched *The IAU Global Survey on the impact of COVID-19 on higher education around the world*. It was available online from 25 March until 17 April 2020. It allowed to collect and analyse replies from 424 universities and other Higher Education Institutions (HEIs) based in 111 countries and territories. IAU will work with partners to develop regional perspectives to complement the survey in the months to come.

In the meantime, IAU hopes that this Global Survey Report will stimulate more research on the impact of COVID-19 on higher education and serve as a useful source of information for everyone interested in higher education.

This survey is only the first iteration of a series of three surveys on the impact of COVID-19 on HE and it is part of a larger set of activities carried out by IAU to inform about the impact of COVID-19 on HE.

IAU activities in the current context aim to assist universities and other higher education institutions, decision makers and HE stakeholders in society at large to develop the responses needed to ensure quality and value based higher education for the future.

More information and regular updates are available on the IAU website: www.iau-aiu.net



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ISBN: 978-92-9002-212-1