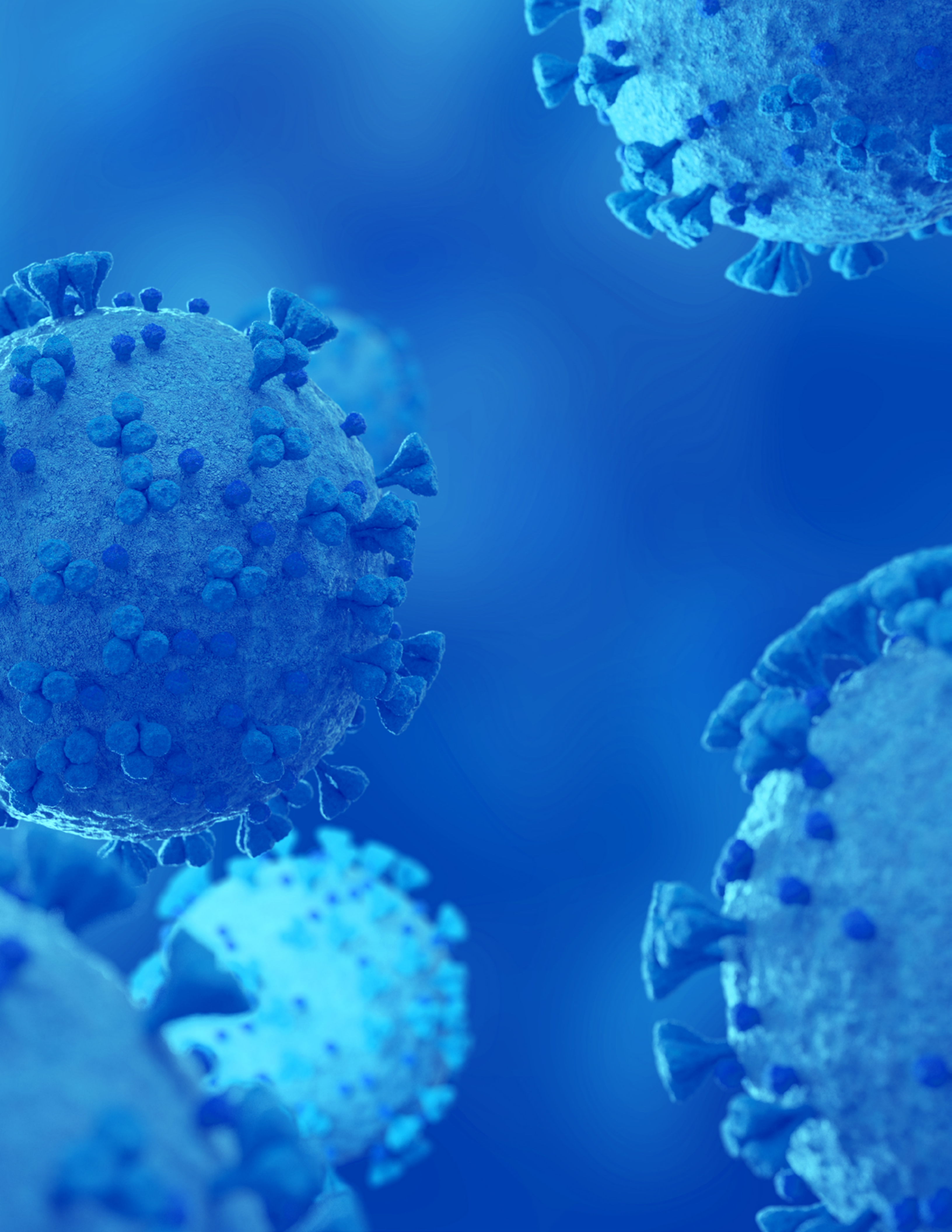
Leadership Responses to COVID-19

A Global Survey of College and University Leadership

A Report
by
International Association of University Presidents
and
Santander Universidades

February 2021



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Foreword

2020 has been a challenging year for the educational institutions and by its very definition. The International Association of University President (IAUP) is at the center of this struggle. With the goal to better understand the problem and assist stakeholders in better facing the future, IAUP and Santander Universidades designed, developed, and implemented a Global Survey of College and University Leadership (IAUP Survey).

The aim of the survey was to analyze the HEI leadership responses to COVID-19 and acompanying changes for the coming years. While the details of the survey response and analyses are presented in the paper, I would like to underline some findings and conclusions.

It is clear that most universities were not ready for the pandemic and are still scrambling to adjust, with financial troubles and income losses insight. More worryingly, the leadership still does not approach the situation with required gravity, considering it something temporary and caring more for immediate issues than longer-term restructuring and development – which needs to be addressed today to bear fruit in a suitable timeframe.

The general expectation is for the start of a new stage in higher education, with a much greater emphasis on hybridization with online education and materials, a section still in its infancy in most of the developing world. The new stage of delivering education.

Currently, maintaining and developing partnerships and collaboration are seen as key for addressing this issue, namely the development of e-mobility and strengthening internationalization. Unfortunately, the collaboration with business and consequently student prospects of success beyond university have become a top concern of the HEI management.

In face of these challenges, we should stand united and ready to implement the strategies and changes necessary to maintain student engagement, education quality, and financial stability. The collaboration of HEI's worldwide has become more, not less, important to maintain academic standards through maintaining contacts. It has become necessary to concentrate on developing technology for online and remote education and work, as well as the corresponding skills of both students and faculty.

Meanwhile, I urge you to maintain tight health and risk management. To look at the situation with a longer view and to remember your friends at IAUP and beyond.

Dr. Kakha Shengelia
President of the International Association
of University Presidents (IAUP)
President of Caucasus University (CU)

Introduction

The International Association of University President (IAUP) and Santander Universidades designed, developed, and implemented a Global Survey of College and University Leadership (IAUP Survey) to learn about Leadership Responses to COVID-19. In order to broaden the scope and geographical reach of the survey, IAUP and Santander Universidades received collaboration from the Hispanic Association of Colleges and Universities (HACU), the Consortium for North American Higher Education (CONAHEC), the Mexican Federation of Private Universities (FIMPES), the National Association of Universities and Institutions of Higher Education of Mexico (ANUIES), and the Association of Indian Universities (AIU).

We have benefited from and acknowledge previous surveys undertaken by higher education related organizations throughout 2020 in different regions, as listed below:

- "Responding to the COVID-19 Crisis: A Survey of College and University Presidents", Inside Higher Education and Hanover Research, March 2020.
- The IAU Global Survey Report, International Association of Universities, May 2020.
- "Decision-Making for an Unprecedented Fall Semester", The Chronicle of Higher Education, June 9, 2020.
- THE Leaders Survey: "Will Covid-19 leave universities in intensive care?", Times Higher Education, June 25, 2020.
- College and University Presidents Respond to COVID-19: July 2020 Survey, American Council on Education.

In relation to COVID-19, the IAUP Survey focused on Initial Institutional Reaction, Preparing for 2020-2021, and Looking Forward. Initial Institutional Reactions refers essentially to the first half of 2020. Preparing for 2020-2021 comprises the period immediately before the start of and for some the Fall academic period in progress. Looking Forward concerns what leaders envision three or more years from now.

While the document presents more fully on the responses of higher education leaders from around the world, the following are some highlights concerning readiness to face the pandemic, most important actions that institutions had to set in motion, areas where decreases and increases were anticipated, the impact on internationalization, the focus and whether institutions have been responding to the pandemic as something temporary that will pass or some phenomenon that will require more dramatic and substantive changes and adaptations, and what leaders envision in the future regarding delivery models (face-to-face, hybrid, and/or online).

The results of the IAUP Survey are presented from several perspectives. The responses to each of the questions are covered first from a global or aggregate perspective, followed by region (North America, Central/South America and the Caribbean, Europe, Africa/Middle East, Asia/Oceania), then by sector (public, private), by Ibero-America (Spanish and Portuguese speaking countries in the Americas plus Spain and Portugal) vs. Rest of the World, and then focusing on the results for a select group of countries (the USA and Mexico; Argentina and Brazil; the UK and Spain; India and Japan).

There is also a supplemental section that presents the results for each of the countries listed above, covering a select number of questions from the survey (readiness, main challenges, anticipated areas of decreases or increases, impact on financial model, internationalization, focus of institutional responses, outlook for the future).

- Just 37% of respondents considered their institution ready for COVID-19.

- Most important for institutions have been faculty training, technology needs (58%), maintaining academic standards (54%), emergency financial assistance for students (45%), and mental health support for students (40%).

- The overwhelming majority of responses indicated that for 2020-2021 institutions (73%) were preparing for classes to be offered under a hybrid or mixed mode.

- In considering the possible resumption of campus operations at some point during this academic year, respondents were considering social distancing (88%), sanitizing buildings (85%), compulsory masks (80%), COVID-19 training for employees (67%), and regular temperature screening (54%).

- In terms of preventive measures, leaders pointed out limited class sizes for social distancing (85%), investing in technology infrastructure (83%), training programs for digital delivery (78%), strategies for labs and special classes (77%), and mental health for students (71%).

- The influence on decision making appears to be mostly government health authorities (87%), followed by government educational authorities (73%).

- Leaders indicated that they expected decreases in institutional revenues (73%), student enrollment (59%), projects with business and industry (56%), investment in infrastructure (49%), and fund raising (49%). On the other hand, they anticipated increases in financial support for students (45%), investment in infrastructure (30%), continuing education (28%), programs supporting student employability (25%), and programs supporting entrepreneurship (24%).

- A higher number of institutions responded that they were focusing on addressing temporary needs rather (47%) than restructuring (39%) or reinventing (36%).

- Regarding financial measures, leaders pointed out postponing hires (54%), using reserve funds (54%), cancelling temporary hires (40%), postponing or cancelling replacement hires (38%), and promoting early retirement (21%).

- The main concerns were student success (68%), overall financial stability (57%), maintaining student engagement (51%), inclusion (49%), and a decline in student enrollment (44%).

- In terms of internationalization, respondents commented that their focus during this year would be maintaining partnerships (68%), e-mobility or virtual mobility (63%), prioritizing existing partnerships (56%), internationalization at home (49%), and suspending or limiting study trips for students (47%).

- Leaders envision a future where institutions will be offering programs that are online, hybrid, and face-to-face (71%), hybrid programs (70%), online programs (67%), alternative educational models (66%), and markets to be served.

- There were few similarities across regions. One related to anticipated areas of decreases, where the top choice involved institutional revenues. Another involved what institutions were doing as a result of the impact, with the response by the regions was that they were adjusting temporarily. And, perhaps appropiately so, all regions highlighted student success as a concern.

Overall, the results of the IAUP Survey indicate that most institutions:

- Were not ready to face the pandemic;
- Have pivoted with pedagogical, technology, and health related measures to provide continuity to educational programs;
- Relied on the support of the faculty to migrate to remote distance education;
- Appear to be opening up to an emerging broader perspective on internationalization;
- Will be impacted financially calling into question their short and long term sustainability;
- Still tend to focus on short term and superficial above long term and substance; and
- Envision on the horizon a future where face-to-face education will increasingly incorporate technology and be accompanied by hybrid and online modes of delivery.

Lastly, we would like to acknowledge the laborious and pivotal support of a study of this nature, without whom this would not have been posible: Dr. Noé Chirino, Salomón Amkie Cheirif, Gabriela Rivera, Nubia Cervantes, Verónica Rendón, Vanessa Zepeda Hernández, Xiuyi Mei, Cristina Monteón, and Alejandra Arámburo.

After this globally collective effort, our hope is that the results will further inform and better prepare leaders to not only face the challenges of the possible continuation of COVID-19, but also to begin to address major transformational needs in higher education that were present before the pandemic. Innovation and change in higher education can no longer wait. Not responding to the challenge intensify and accelerate the impact on colleges and universities.

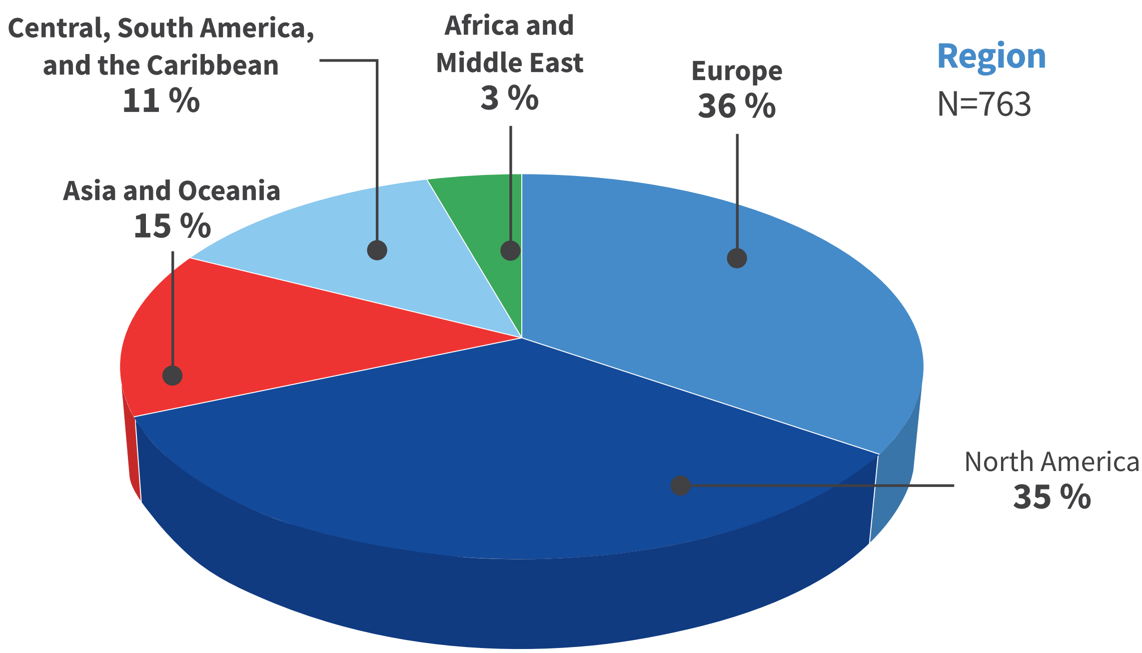
Dr. Fernando León García
President Elect, International Association of University Presidents
President, CETYS University

Dr. Arturo Cherbowski Lask
Executive Director, Santander Universidades México
General Director, Universia Mexico

Information on Respondents

The IAUP Survey was sent to senior leaders of colleges and universities from around the world via SurveyMonkey between mid-July and mid-September of 2020. While there were 801 respondents from 92 countries, a total of 763 responses from 89 countries are considered for the purposes of data analysis.

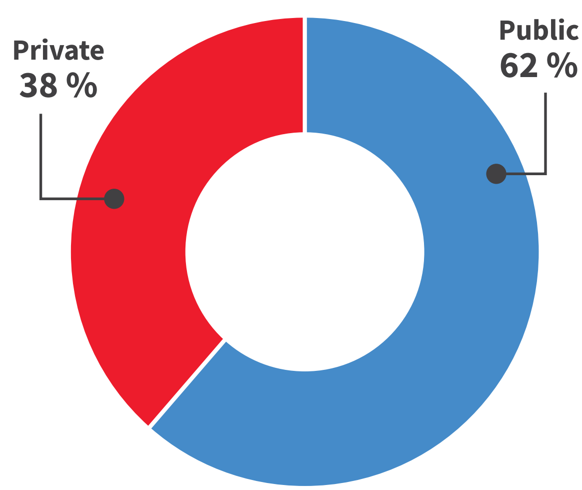
Europe (36%) and North America (35%) were the regions with the most responses, followed by Asia/Oceania, Central, South America and the Caribbean, and Africa and the Middle East.



University Classification

N=741

Public universities were more broadly represented (62%) than private universities (38%).



In terms of number of countries, Europe was the region that was most well represented. The countries with the most responses were: The USA, Mexico, the UK, Italy, India, France, Argentina, Germany, Spain, Brazil, Georgia, Chile, Japan, Thailand, Canada, South Korea, Finland, the Netherlands, China, Bangladesh, and Colombia.

Europe (271)			
United Kingdom (UK) (82)	Russia (5)	Austria (2)	Cyprus (1)
Italy (36)	Romania (4)	Belgium (2)	Denmark (1)
France (25)	Sweden (4)	Croatia (2)	Estonia (1)
Germany (17)	Ukraine (4)	Norway (2)	Greece (1)
Spain (17)	Bulgaria (3)	Slovakia (2)	Hungary (1)
Georgia (13)	Czechia (3)	Switzerland (2)	Ireland (1)
Finland (9)	Poland (3)	Albania (1)	Latvia (1)
Netherlands (9)	Portugal (3)	Armenia (1)	North Macedonia (1)
Azerbaijan (7)	Turkey (3)	Belarus (1)	Slovenia (1)

North America (267)		
United States (138)	**Mexico (118)**	**Canada (11)**

Asia and Oceania (105)			
India (34)	China (8)	New Zeland (2)	Indonesia (1)
Japan (12)	Australia (3)	Philippines (2)	Kazakhstan (1)
Thailand (11)	Malaysia (3)	Vietnam (2)	Singapore (1)
South Korea (10)	Taiwan (3)	Brunei (1)	Solomon Islands (1)
Bangladesh (8)	Laos (2)		

Central, South America, and the Caribbean (87)			
Argentina (25)	Puerto Rico (5)	Uruguay (3)	Guatemala (1)
Brazil (15)	Bolivia (4)	El Salvador (2)	Panama (1)
Chile (12)	Ecuador (4)	Peru (2)	Paraguay (1)
Colombia (8)	Costa Rica (3)	Dominican Republic (1)	

Africa and Middle East (33)			
Egypt (4)	United Arab Emirates (2)	Liberia (1)	Nigeria (1)
Lebanon (4)	Botswana (1)	Mauritius (1)	Oman (1)
South Africa (4)	Côte d'Ivoire (1)	Morocco (1)	Qatar (1)
Ghana (3)	Iraq (1)	Mozambique (1)	Saudi Arabia (1)
Tunisia (2)	Jordan (1)	Namibia (1)	Uganda (1)

Summary of Findings

Initial Institutional Reaction

Readiness to Shift to Remote Education

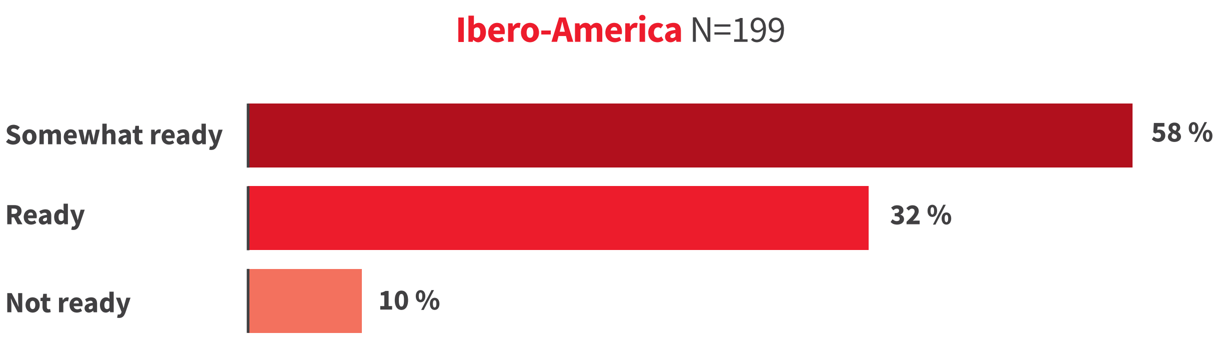
Overall, slightly more than one third pointed out that they were ready (37%), while more than half on respondents indicated that they were somewhat ready (54%). Only a small amount (8%) felt they were not ready.

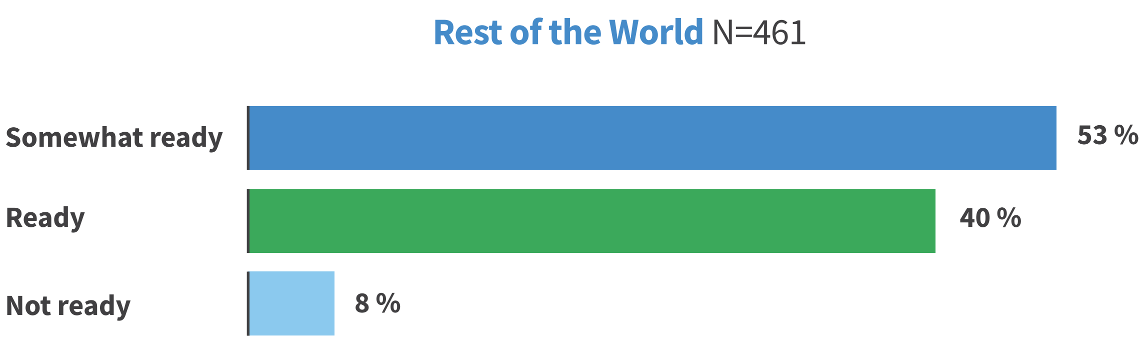
By region, a higher percent of universities from Asia/Oceania expressed being ready (49%), compared to Central and South America (41%), Europe (40%), Africa/Middle East (36%), and North America (29%).

A larger percent of private universities expressed being ready to move to remote education (43%) compared to public universities (34%).

	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/ Middle East	Asia/ Oceania	Private	Public
Ready	29 %	41 %	40 %	36 %	49 %	43 %	34 %
Somewhat Ready	60 %	51 %	56 %	50 %	41 %	50 %	57 %
Not Ready	11 %	8 %	4 %	14 %	10 %	7 %	9 %

Respondents from Ibero-America reported they were ready at a lower percent (32%), than the Rest of the World (40%), Global (37%) or any of the regions except North America (29%).





By sector, results show that, in Ibero-America, a higher percentage of private universities felt ready (38%) than public ones (20%) but lower than privates from the Rest of the World. Public universities from Ibero-America were ready at a lower percentage (20%) than public ones from the Rest of the World.

	Ibero-America		Rest of the World	
	Private	Public	Private	Public
Ready	38 %	20 %	47 %	37 %
Somewhat Ready	57 %	61 %	45 %	56 %
Not Ready	5 %	19 %	8 %	7 %

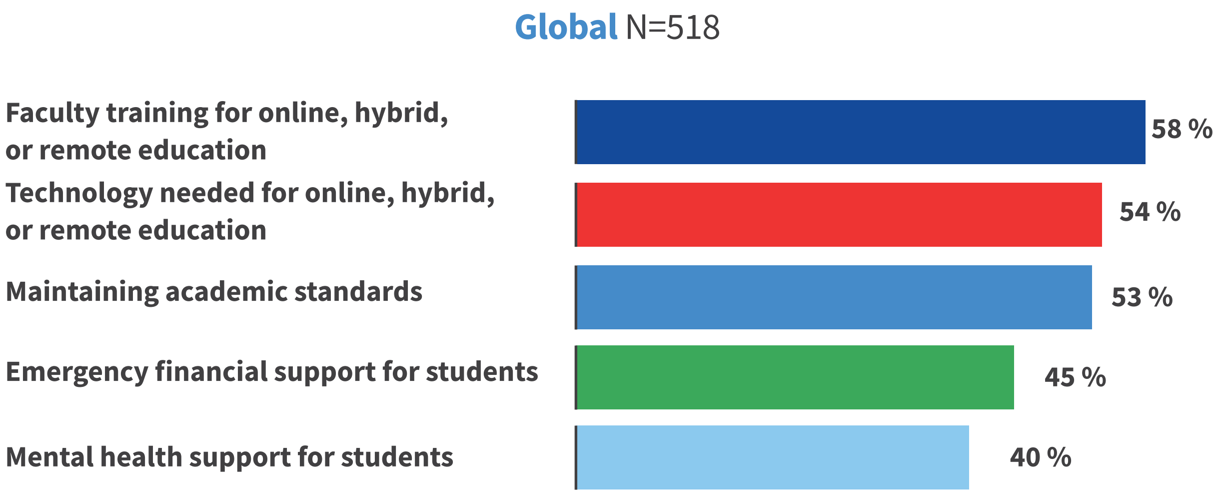
Among a select number of countries from North America, Central and South America, Europe, and Asia/Oceania, there are wide variances relative to the Global Response of 37% being ready: Close to that percent were the USA and Argentina both with 36%, while Mexico and the UK were lower at 21% and 23%, and those that expressed a higher percent of readiness were India with 59%, Spain with 56%, and Brazil with 50%.

	Global	United States	Mexico	Argentina	Brazil	United Kingdom	Spain	India	Japan
	N=661	N=138	N=118	N=22	N=14	N=66	N=16	N=29	N=10
Ready	37 %	36 %	21 %	36 %	50 %	23 %	56 %	59 %	40 %
Somewhat Ready	54 %	56 %	66 %	50 %	36 %	73 %	38 %	34 %	50 %
Not Ready	8 %	9 %	13 %	14 %	14 %	5 %	6 %	7 %	10 %

With respect to a comparison about being ready within their own region: The USA was above the response for North America (29%) while Mexico was lower; Brazil was higher than the response for Central/South America and the Caribbean (41%) while Argentina was lower; Spain was above the response for Europe (40%) while the UK was lower; and India was higher than the response for Asia/Oceania (49%) while Japan was lower.

Challenges as a Result of COVID-19

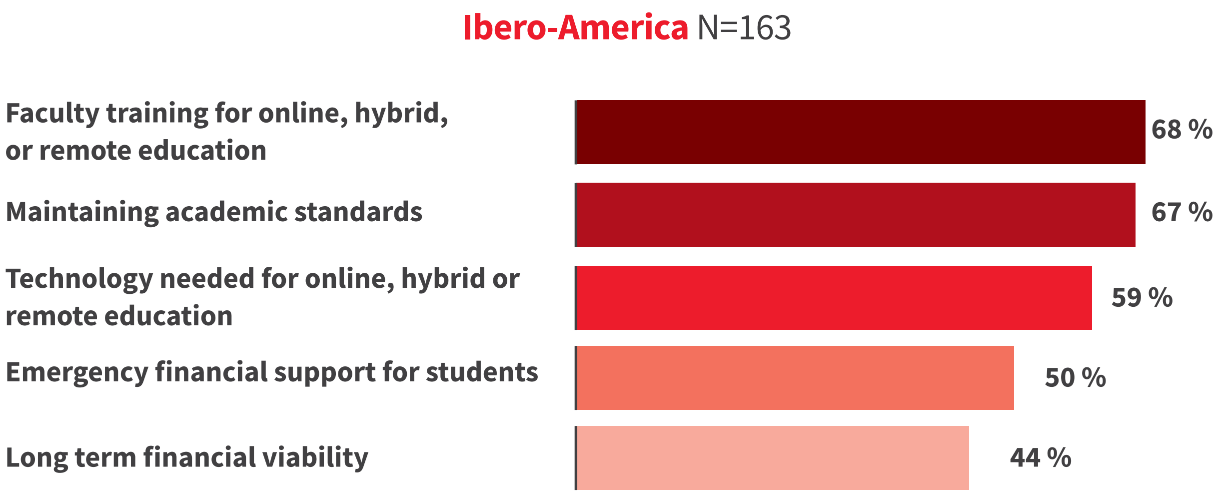
The Top 5 challenges expressed by respondents include faculty training, the technology required, maintaining academic standards, emergency financial support for students, and mental support for students.

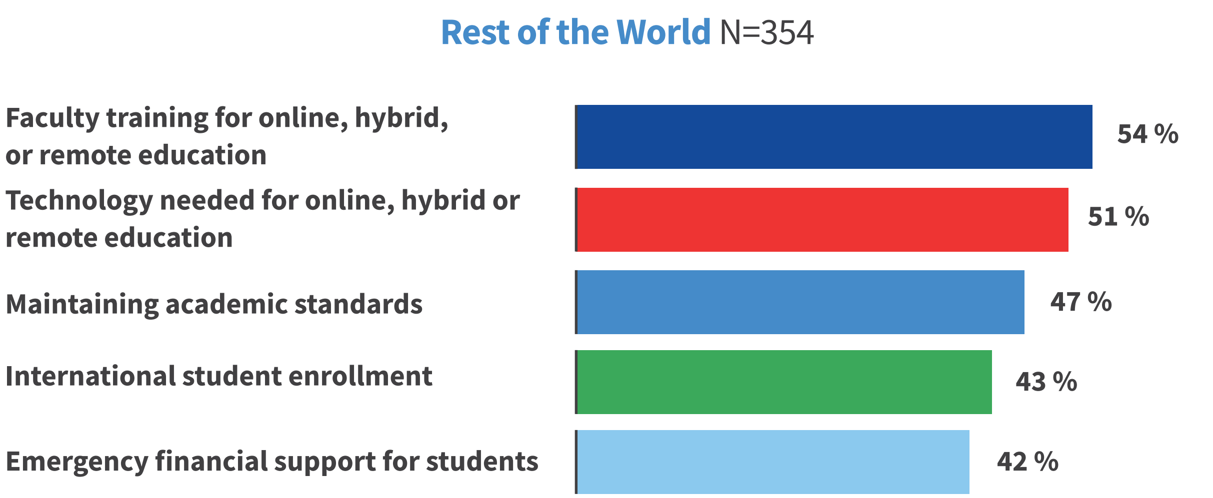


Faculty training was listed as the top challenge across the Americas, while in Europe and Africa/Middle East it was maintaining academic standards, and in Asia/Oceania the top response was technology required. Among private and public institutions, the Top 3 challenges were the same as the overall result.

Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/ Middle East	Asia/ Oceania	Private	Public
1	Faculty training (64 %)	Faculty training (70 %)	Maintaining academic standards (57 %)	Maintaining academic standards (64 %)	Technology required (53 %)	Faculty training (55 %)	Faculty training (61 %)
2	Emergency financial support/ students (61 %)	Maintaining academic standards (64 %)	International student enrollment (56 %)	Faculty training (50 %)	Faculty training (47 %)	Technology required (50 %)	Technology required (56 %)
3	Technology required (54 %)	Technology required (57 %)	Technology required (53 %)	Technology required (50 %)	Maintaining academic standards (41 %)	Maintaining academic standards (49 %)	Maintaining academic standards (56 %)

In Ibero-America, the Top 5 challenges reported by the respondents include faculty training, maintaining academic standards, required technology, emergency financial support for students, and long-term financial viability. The difference with respect the Rest of the World is long term financial viability vs International Student Enrollment, whereas relative to global it was Long Term Financial Viability vs Mental Health Support for Students.





By sectors, faculty training was listed as the top challenge across all classification except for the case of Ibero-American public universities, where the top challenge was maintaining academic standards.

Top	Ibero-America		Rest of the World	
	Private	Public	Private	Public
1	Faculty training for online, hybrid, or remote education (72 %)	Maintaining academic standards (62 %)	Faculty training for online, hybrid, or remote education (42 %)	Faculty training for online, hybrid, or remote education (60 %)
2	Maintaining academic standards (70 %)	Faculty training for online, hybrid, or remote education (60 %)	Technology needed for online, hybrid or remote education (40 %)	Technology needed for online, hybrid or remote education (57 %)
3	Technology needed for online, hybrid or remote education (62 %)	Technology needed for online, hybrid or remote education (53 %)	Emergency financial support for students (39 %)	Maintaining academic standards (53 %)

When comparing the select number of countries from North America, Central and South America, Europe, and Asia/Oceania, there are major differences relative to the Global Response, where the top challenge listed was faculty training.

- For Argentina, faculty training was at the top
- For Japan and India, it was technology
- For Mexico, Spain, and Brazil, maintaining academic standards
- For the USA, emergency financial support for students; and
- For the UK, international student enrollment.

Top	Global	United States	Mexico	Argentina	Brazil	United Kingdom	Spain	India	Japan
	N=518	N=114	N=85	N=17	N=10	N=49	N=14	N=29	N=8
1	Faculty training for online, hybrid, or remote education (68 %)	Emergency financial support for sudents (66 %)	Maintaining academic standards (69 %)	Faculty training for online, hybrid, or remote education (88 %)	Maintaining academic standards (80 %)	International student enrollment (73 %)	Maintaining academic standards (71 %)	Technology needed for online, hybrid or remote education (59 %)	Technology needed for online, hybrid or remote education (25 %)
2	Technology needed for online, hybrid or remote education (70 %)	Faculty training for online, hybrid, or remote education (61 %)	Faculty training for online, hybrid, or remote education (68 %)	Maintaining academic standards (65 %)	Technology needed for online, hybrid or remote education (70 %)	Maintaining academic standards (51 %)	Faculty training for online, hybrid, or remote education (64 %)	Faculty training for online, hybrid, or remote education (55 %)	Faculty training for online, hybrid, or remote education (25%)
3	Maintaining academic standards (65 %)	Government Funding (54 %)	Technology needed for online, hybrid or remote education (61 %)	Technology needed for online, hybrid or remote education (59 %)	Faculty training for online, hybrid, or remote education (70%)	Mental health support for students (49 %)	Technology needed for online, hybrid or remote education (57 %)	Maintaining academic standards (45 %)	Government Funding (25 %)

Looking at the responses by country compared to their regions, there are again differences as listed below.

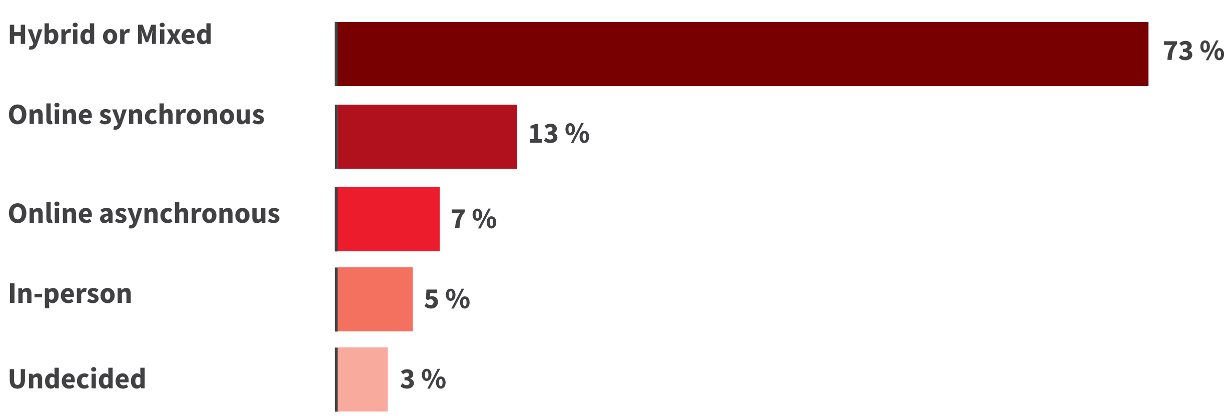
- In North America where faculty training was at the top, for the USA it was emergency financial support for students while for Mexico it was maintaining academic standards.
- In Europe where maintaining academic standards was number one, it was also the case for Spain but not for the UK where it is was international student enrollment.
- In Central/South America and the Caribbean where faculty training placed first and this coincided with Argentina, for Brazil it involved maintaining academic standards.
- In Asia/Oceania where the top choice was the technology required, this was also the case in India and Japan.

Preparing for 2020-2021

Mode of Delivery

The vast majority of respondents indicated that they were preparing for a hybrid or mixed model (73%) with only a small fraction considering the possibility of online synchronous sessions and an even smaller percentage for online asynchronous models. Roughly 5% mentioned the possibility of in person or face to face sessions and less than 3% declared they were still uncertain or undecided.

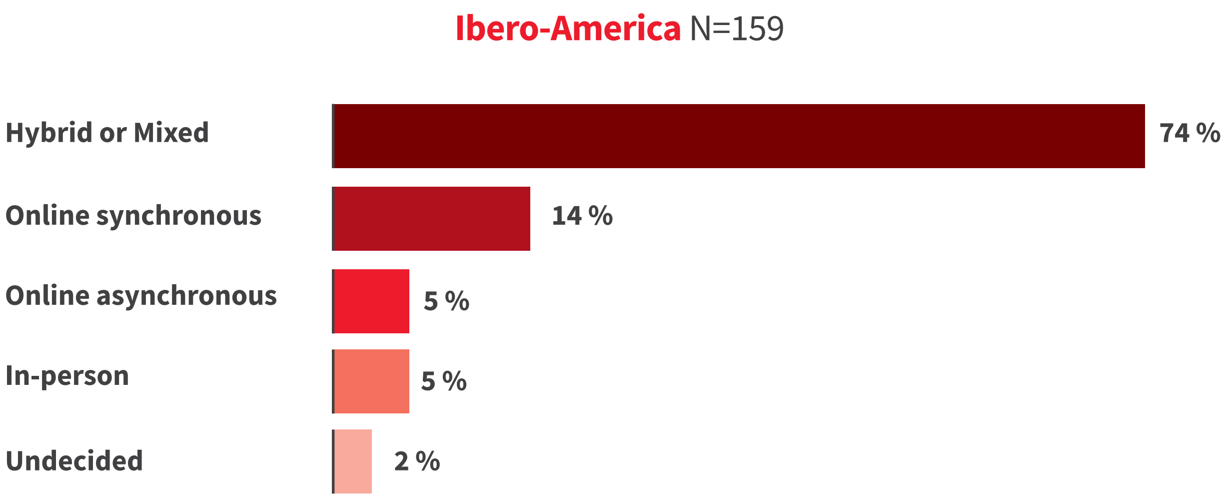
Global N=508



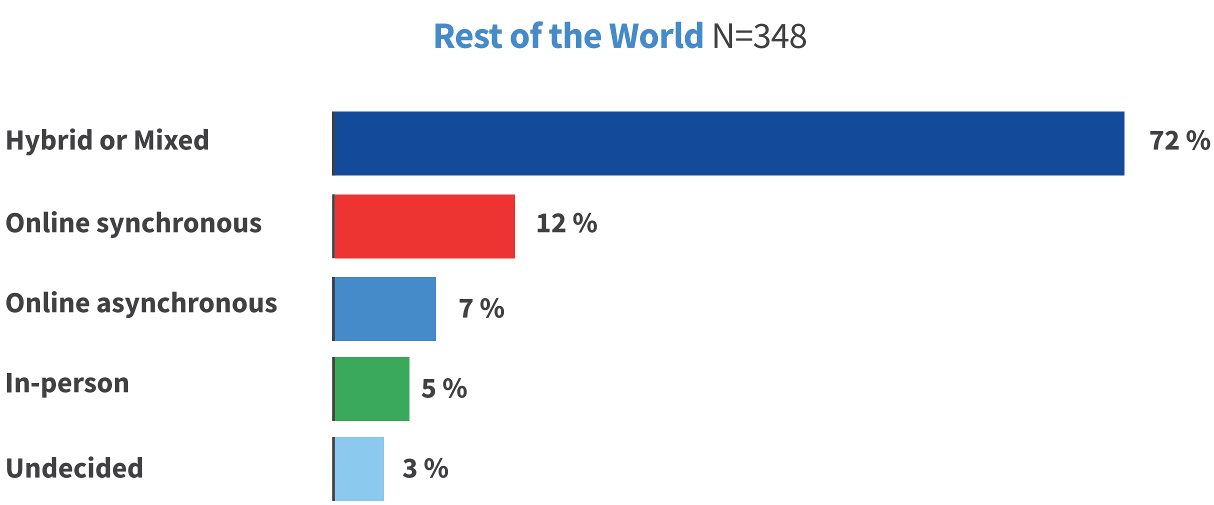
By region, Europe and Africa/Middle East were the regions where hybrid or mixed were the highest (86%). By denomination, both private and public institutions were thinking about implementing a hybrid or mixed model of delivery (74% and 71% respectively).

	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/ Middle East	Asia/ Oceania	Private	Public
Hybrid or Mixed	62 %	75 %	86 %	86 %	69 %	74 %	71 %
Online	32 %	18 %	7 %	9 %	19 %	18 %	22 %
In-Person	6 %	2 %	5 %	5 %	4 %	6 %	4 %

In Ibero-America, the vast majority of respondents indicated that they were preparing for a hybrid or mixed model (74%) with only a small fraction considering the possibility of online synchronous sessions (14%) and an even smaller percentage (5%) for online asynchronous models.



In the Rest of the Word, the vast majority of respondents (72%) also indicated that they were preparing for a hybrid or mixed model with only a small fraction (13%) considering the possibility of online synchronous sessions and an even smaller percentage (7%) for online asynchronous models.



By sectors, Ibero-America and the Rest of the World, private and public institutions were thinking about implementing a hybrid or mixed model of delivery (73%,76%, and 74%,71% respectively).

	Ibero-America		Rest of the World	
	Private	Public	Private	Public
Hybrid or Mixed	73 %	76 %	74 %	71 %
Online	18 %	21 %	17 %	22 %
In-Person	7 %	2 %	7 %	3 %

When comparing across the select number of countries from North America, Central and South America, Europe, and Asia/Oceania, there are was convergence relative to the Global Response of hybrid or mixed mode (73%), with the UK (96%), Argentina (88%), and Brazil (80%) expressing a higher percent, while Spain (67%), Japan (63%), and the USA (54%) pointing out a lower percent.

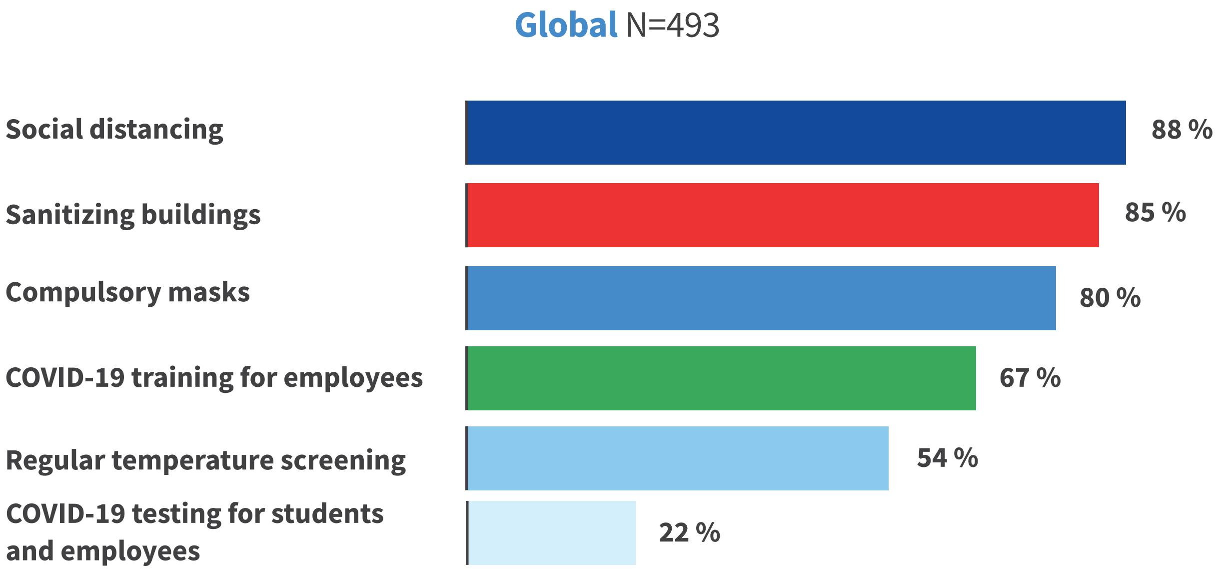
	Global	United States	Mexico	Argentina	Brazil	United Kingdom	Spain	India	Japan
	N=508	N=113	N=83	N=17	N=10	N=48	N=12	N=22	N=8
Hybrid or Mixed	73 %	54 %	76 %	88 %	80 %	96 %	67 %	73 %	63 %
Online	20 %	37 %	21 %	6 %	20 %	0 %	8 %	14 %	0 %
In-Person	5 %	8 %	4 %	6 %	0 %	2 %	25 %	5 %	13 %

Reviewing the responses of select countries relative to their regions, there is consensus on the top response of hybrid or mixed, with some variations in the percentages within the region.

- In North America (62%), for the USA it was lower (54%) and for Mexico it was higher (76%).
- In Europe (86%), it was lower for Spain (67%) but much higher for the UK (96%).
- In Central/South America and the Caribbean (75%), both Argentina (88%) and Brazil were higher (80%).
- In Asia/Oceania (69%), for Japan it was lower (63%) and for India higher (73%).

Resuming Campus Operations

Overall, respondents indicated social distancing, sanitizing buildings, and the use of compulsory masks as the most important actions as universities prepared to resume campus operations.

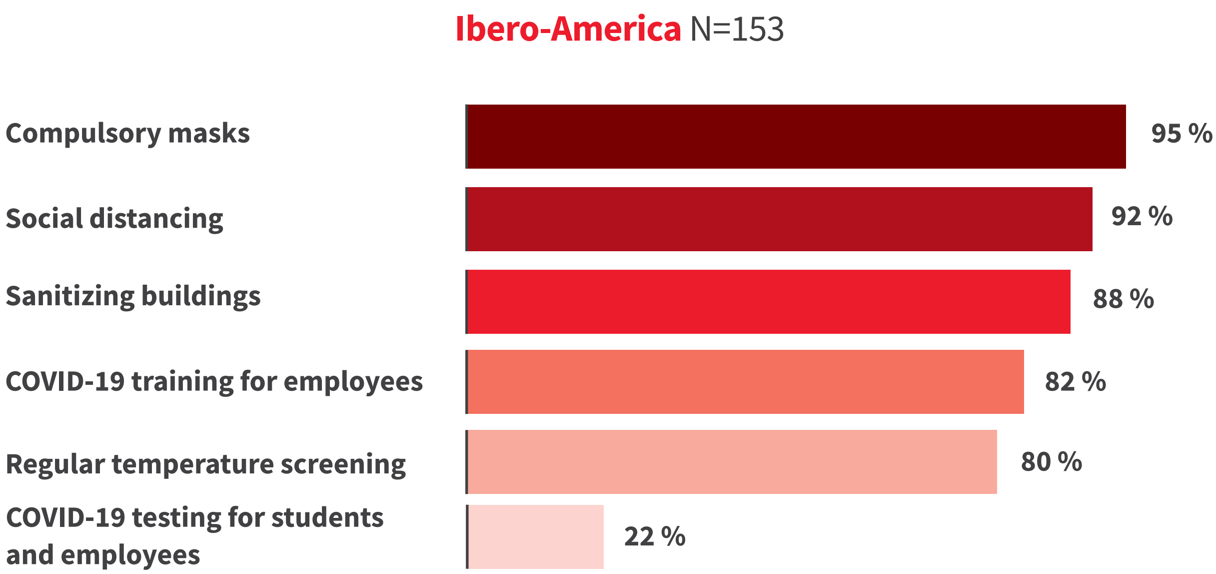


Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/ Middle East	Asia/ Oceania	Private	Public
1	Compulsory masks (95 %)	Compulsory masks (97 %)	Social distancing (89 %)	Social distancing (91 %)	Social distancing (68 %)	Compulsory masks (87 %)	Social distancing (89 %)
2	Social distancing (93 %)	Social distancing (93 %)	Sanitizing buildings (83 %)	Sanitizing buildings (91 %)	Sanitizing buildings (68 %)	Social distancing (86 %)	Sanitizing buildings (85 %)
3	Sanitizing buildings (93 %)	Sanitizing buildings (83 %)	Compulsory masks (91 %)	Compulsory masks (59 %)	Compulsory masks (66 %)	Sanitizing buildings (85 %)	Compulsory masks (76 %)

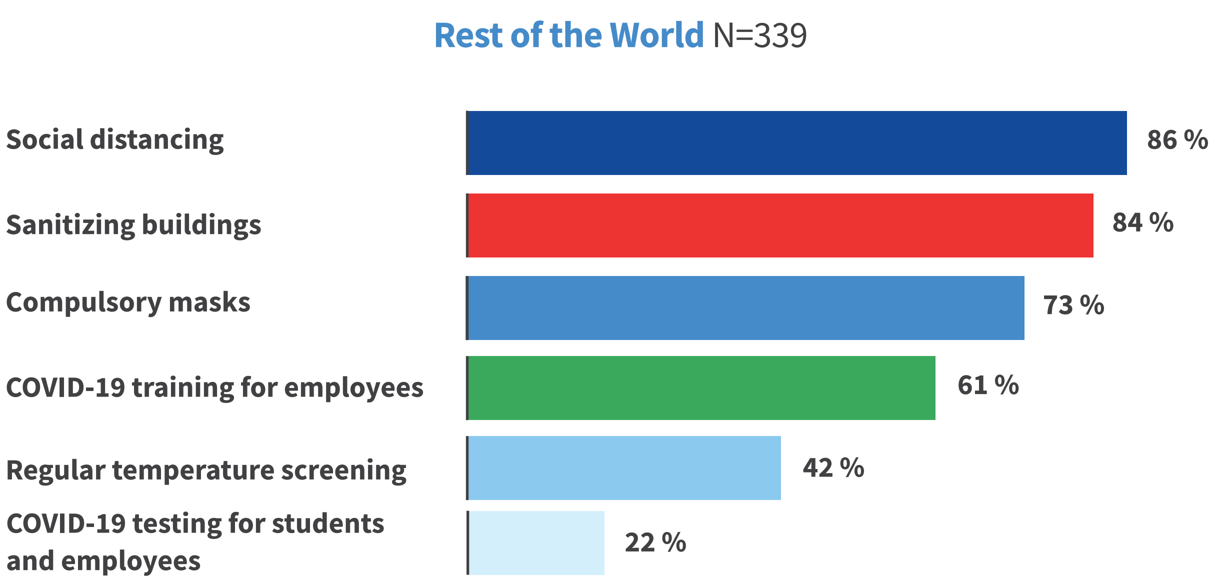
By region, compulsory masks are more important in North America and Central/South America compared to Europe, Africa/Middle East and Asia/Oceania where social distancing is at the top of the list.

By denomination, compulsory masks were the top choice at private institutions while at public institutions social distancing was at the top.

Ibero-American respondents signaled the use of compulsory masks, social distancing, and sanitizing buildings as the most important actions as they prepared to resume campus operations.



Respondents from the Rest of the World mentioned the same three actions as the most important ones but in a different order: Social distancing, sanitizing buildings, and the use of compulsory masks.



Global results show the same Top 3 actions, but masks and social distancing are remarkably important (over 90% each) in Ibero-America.

By sectors, compulsory masks were Ibero-America's top choice for both privates and publics. In the Rest of the World, sanitizing buildings and social distancing were at the top both in public and private institutions.

Top	Ibero-America		Rest of the World	
	Private	Public	Private	Public
1	Compulsory masks (96 %)	Compulsory masks (95 %)	Sanitizing buildings (82 %)	Social distancing (90 %)
2	Social distancing (93 %)	Social distancing (89 %)	Social distancing (81 %)	Sanitizing buildings (85 %)
3	Sanitizing buildings (88 %)	Sanitizing buildings (88 %)	Compulsory masks (79 %)	Compulsory masks (71 %)

When comparing the select number of countries from North America, Central and South America, Europe, and Asia/Oceania, there are major differences relative to the Global Response, where the top challenge listed was social distancing, and across regions.

- Social distancing was at the top for the UK and Argentina.
- For the US, Spain, and Japan, it was social distancing and compulsory masks.
- Compulsory masks were the preferred choice for Mexico and India.
- For Brazil, the preference was for sanitizing buildings, COVID-19 training for employees, and compulsory masks.

Top	Global	United States	Mexico	Argentina	Brazil	United Kingdom	Spain	India	Japan
	N=111	N=111	N=79	N=17	N=9	N=48	N=12	N=22	N=8
1	Social distancing (88 %)	Social distancing (96 %)	Compulsory masks (96 %)	Social distancing (100 %)	Sanitizing buildings (89 %)	Social distancing (94 %)	Social distancing (83 %)	Compulsory masks (82 %)	Compulsory masks (25 %)
2	Sanitizing buildings (85 %)	Compulsory masks (96 %)	Regular temperature screening (94 %)	Compulsory masks (94 %)	COVID-19 training for employees (89 %)	Sanitizing buildings (90 %)	Compulsory masks (83 %)	Social distancing (73 %)	Social distancing (25 %)
3	Compulsory masks (80 %)	Sanitizing buildings (95 %)	Sanitizing buildings (94 %)	COVID-19 training for employees (82 %)	Compulsory masks (89 %)	COVID-19 training for employees (73 %)	Sanitizing buildings (75 %)	Sanitizing buildings (73 %)	Sanitizing buildings (13 %)

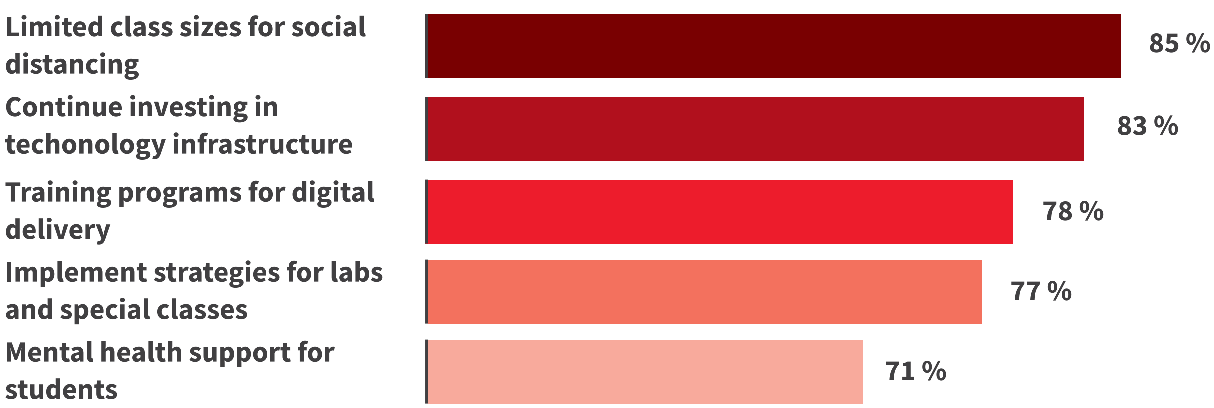
In the comparison of select countries relative to their regions, there are both variations as well as consensus in some cases on the top response.

- In North America where compulsory masks placed as the top choice (95%), for the USA it was social distancing (96%) equally with compulsory masks (96%), while for Mexico it was compulsory masks (96%).
- In Europe where social distancing as at the top (89%), it was also the case the UK (94%) and for Spain (83%).
- In Central/South America and the Caribbean (75%) compulsory masks were the choice, for Argentina it was social distancing (100%), and for Brazil it was sanitizing buildings (89%).
- In Asia/Oceania where social distancing was number one (68%), for India it was compulsory masks (82%) while in Japan it was the combination of compulsory masks (25%) and social distancing (25%).

Preventive Measures

The Top 5 measures were limited class sizes for social distancing, investing in technology infrastructure, training programs for digital delivery, strategies for labs and special classes, and mental health support for students.

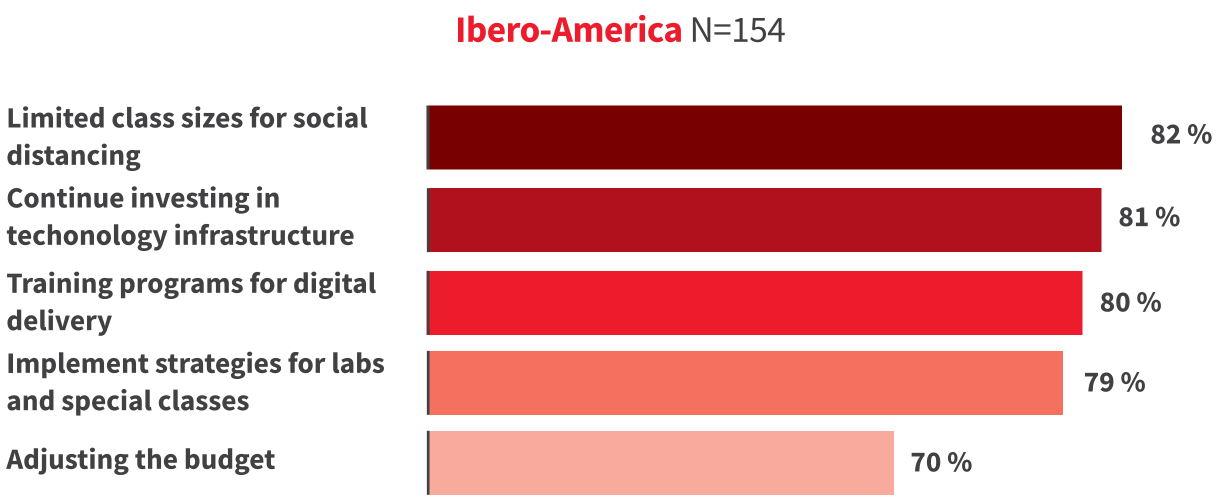
Global N=492



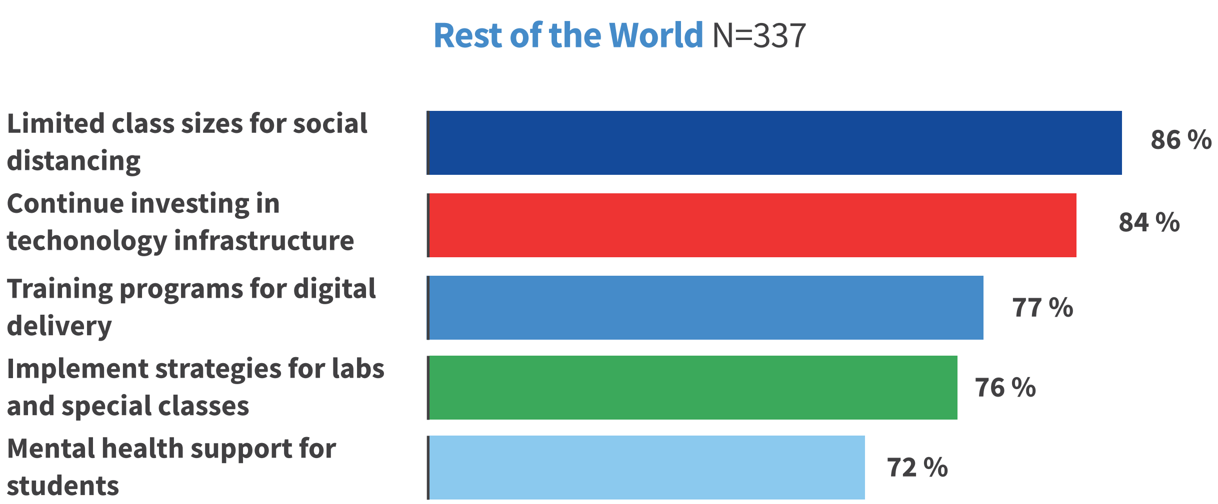
By region, limited class sizes or investing in technology were either number one or two across all regions. By denomination, the same held true as limited class sizes and investing technology were one and two, with number three for privates adjusting the budget and for publics training programs for digital delivery.

Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/ Middle East	Asia/ Oceania	Private	Public
1	Limited class sizes for social distancing (85 %)	Investing in techonology infrastructure (83 %)	Limited class sizes for social distancing (96 %)	Limited class sizes for social distancing (91 %)	Investing in technology infrastructure (69 %)	Limited class sizes for social distancing (84 %)	Limited class sizes for social distancing (85 %)
2	Investing in technology infrastructure (85 %)	Limited class sizes for social distancing (80 %)	Investing in technology infrastructure (88 %)	Investing in technology infrastructure (77 %)	Limited class sizes for social distancing (68 %)	Continue investing in technology infrastructure (80 %)	Continue investing in technology infrastructure (85 %)
3	Training programs for digital delivery (84 %)	Implement strategies for labs and special classes (80 %)	Training programs for digital delivery (79 %)	Implement strategies for labs and special classes (82 %)	Adjusting the budget (68 %)	Adjusting the budget (72 %)	Training programs for digital delivery (84 %)

In Ibero-America, the Top 5 topics were limited class sizes, continue investing in technology, training programs for digital delivery, implement strategies for labs, and adjusting the budget.



In the Rest of the World, we observe the same Top 5 choices with only one exception, mental health support for students which is number five instead of adjusting the budget.



Results show that the global perspective is more similar to that of the Rest of the World. For instance, adjusting the budget is number 6 in both, when for Ibero-America it is number 5.

By sectors, top priorities show minor but significant variations. In Ibero-American private institutions investing in technology is number one while for public institutions training programs is. In the Rest of the World limited class sizes is at the very top for private institutions while for public institutions it is investing in technology.

Top	Ibero-America		Rest of the World	
	Private	Public	Private	Public
1	Continue investing in technology infrastructure (88 %)	Training programs for digital delivery (88 %)	Limited class sizes for social distancing (84 %)	Continue investing in technology infrastructure (89 %)
2	Limited class sizes for social distancing (86 %)	Implement strategies for labs and special classes (77 %)	Continue investing in technology infrastructure (74 %)	Limited class sizes for social distancing (88 %)
3	Implement strategies for labs and special classes (80 %)	Limited class sizes for social distancing (75 %)	Adjusting the budget (68 %)	Training programs for digital delivery (83 %)

The comparison across the select number of countries from North America, Central and South America, Europe, and Asia/Oceania reflects differences relative to the Global Response, where the top measure was the use of limited class sizes for social distancing, and across regions.

- Limited class sizes for social distancing was at the top for Spain, Brazil, and Japan.
- For the US and Argentina, it was to continue investing in technology infrastructure.
- For Mexico and the UK, the top choice involved training programs for digital delivery.
- For India, the preference was for the implementation of strategies for labs and special classes.

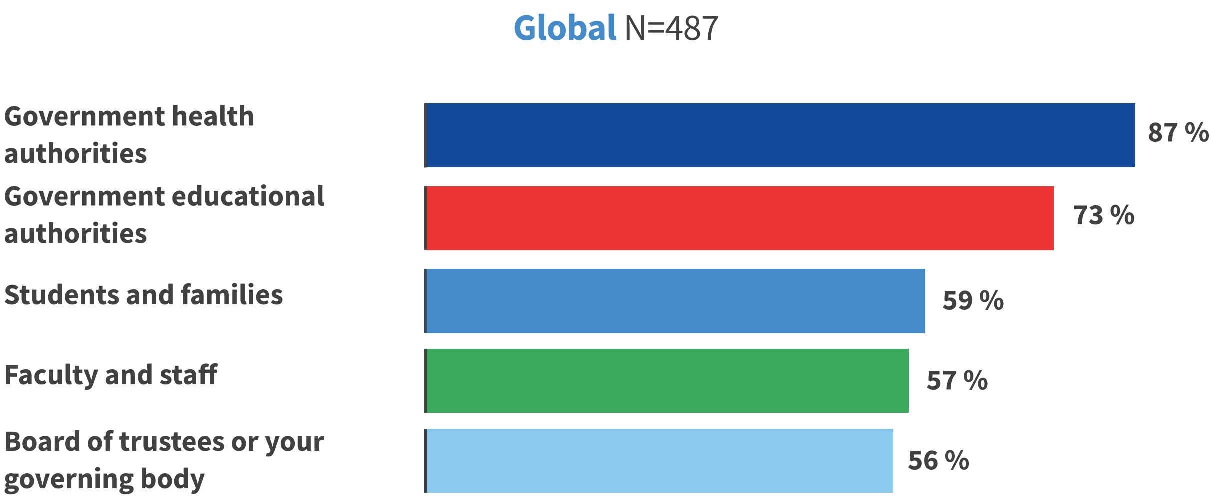
Top	Global	United States	Mexico	Argentina	Brazil	United Kingdom	Spain	India	Japan
	N=492	N=111	N=79	N=17	N=9	N=48	N=12	N=22	N=8
1	Limited class sizes for social distancing (85 %)	Continue investing in technology infrastructure (90 %)	Training programs for digital delivery (86 %)	Continue investing in technology infrastructure (94 %)	Limited class sizes for social distancing (89 %)	Training programs for digital delivery (98 %)	Limited class sizes for social distancing (92 %)	Implement strategies for labs and special classes (73 %)	Limited class sizes for social distancing (50 %)
2	Continue investing in technology infrastructure (83 %)	Limited class sizes for social distancing (88 %)	Limited class sizes for social distancing (82 %)	Limited class sizes for social distancing (88 %)	Training programs for digital delivery (78 %)	Limited class sizes for social distancing (98 %)	Review student financial support (75 %)	Continue investing in technology infrastructure (73 %)	Implement strategies for labs and special classes (25 %)
3	Training programs for digital delivery (78 %)	Implement strategies for labs and special classes (86 %)	Implement strategies for labs and special classes (78 %)	Training programs for digital delivery (71 %)	Mental health support for students (78 %)	Mental health support for students (96 %)	Implement strategies for labs and special classes (75 %)	Training programs for digital delivery (68 %)	Mental health support for students (25 %)

Reviewing the responses of select countries relative to their regions, there are both convergences as well as divergences compared to the top response.

- In North America where limited class sizes (85%) and investing in technology (85%) were the top choices, for the USA it was investing in technology (90%) while for Mexico it was training programs for digital delivery (86%).
- In Europe where limited class sizes was at the top (96%), it was also the case for Spain (92%) whereas for the UK it was training programs for delivery (98%).
- In Central/South America and the Caribbean (75%) the top choice was investing in technology infrastructure, as was also the case for Argentina (94%) but for Brazil it involved limited class sizes (89%).
- In Asia/Oceania where investing in technology infrastructure was number one (69%), for India it that was also the case (73%) plus implementing strategies for labs and special classes (73%), while in Japan it was limited class sizes (50%).

Influence on Decision Making

Government health authorities (87%) are the top entity that universities consider as the point of reference to decide or not to go back to full campus operation.

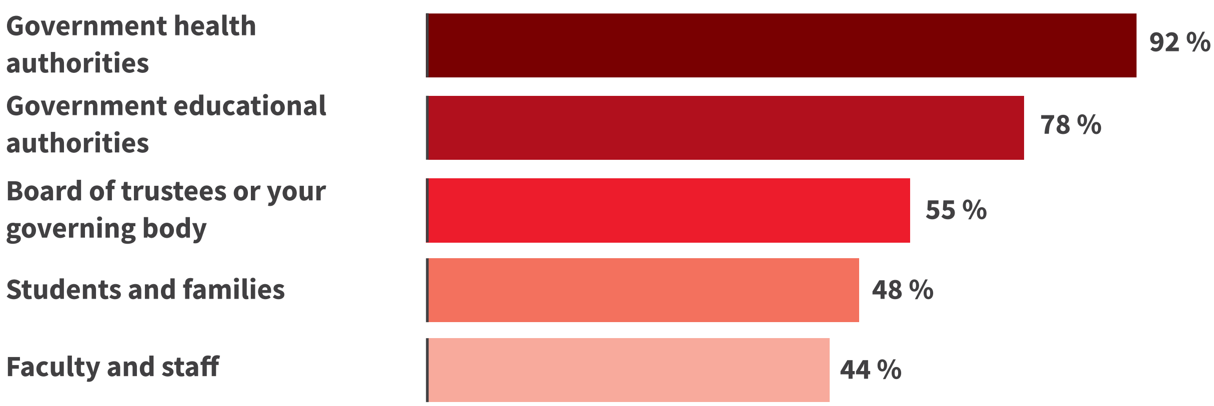


It is also the same by region, except for Asia/Oceania, where government educational authorities are the top point of reference. The third most frequent point of reference varies widely across regions, as for North America it is board of trustees or governing body, for Europe and Africa and the Middle East it is faculty and staff, and students and families for Central and South America and Asia and Oceania. Among privates and publics, the list is the same as for overall.

Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/ Middle East	Asia/ Oceania	Private	Public
1	Government health authorities (91 %)	Government health authorities (90 %)	Government health authorities (92 %)	Government health authorities (81 %)	Government educational authorities (75 %)	Government health authorities (85 %)	Government health authorities (89 %)
2	Government educational authorities (68 %)	Government educational authorities (73%)	Government educational authorities (78 %)	Government educational authorities (76 %)	Government health authorities (67 %)	Government educational authorities (71 %)	Government educational authorities (75 %)
3	Board of trustees or your governing body (66%)	Students and families (51 %)	Faculty and staff (61 %)	Faculty and staff (57%)	Students and families (59 %)	Students and families (58 %)	Faculty and staff (60 %)

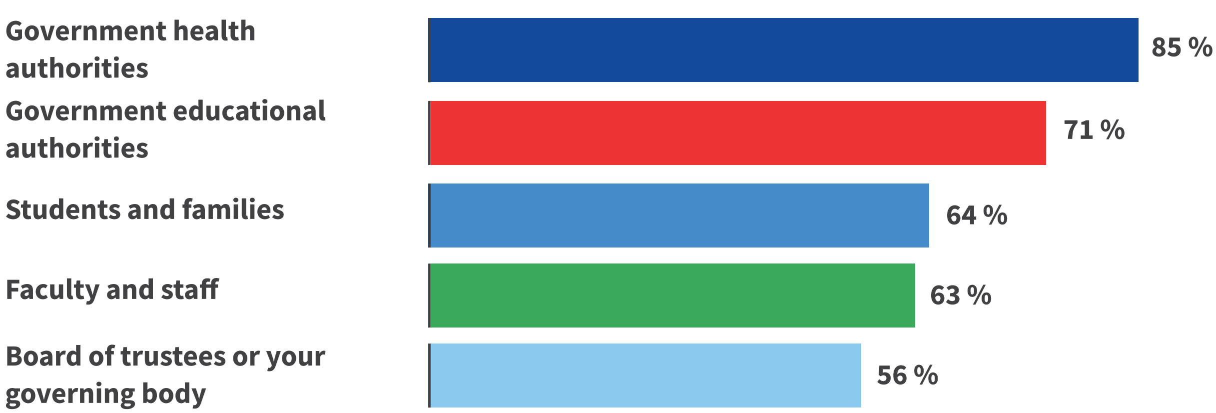
For Ibero-America, government health authorities (92%) are the top entity that universities see as the point of reference to decide whether to go back to full campus operation. Others are educational authorities, board of trustees, students and families, and faculty and staff.

Ibero-America N=153



The same is true for the Rest of the World but with some variations. Government health authorities (85%) are the top one, followed by educational authorities, students and families, faculty and staff, and board of trustees.

Rest of the World N=333



Global results do not show significant variations. Nonetheless, in Asia-Oceania, as a region, government educational authorities (75%) are above government health authorities (67%).

By sectors, we observe the same first two choices for either private or public institutions in both regions. Number 3, however, shows board of trustees for Ibero-America but students and families for the rest of the world.

Top	Ibero-America		Rest of the World	
	Private	Public	Private	Public
1	Government health authorities (93 %)	Government health authorities (89 %)	Government health authorities (79 %)	Government health authorities (88 %)
2	Government educational authorities (77 %)	Government educational authorities (79 %)	Government educational authorities (66 %)	Government educational authorities (74 %)
3	Board of trustees or your governing body (54 %)	Board of trustees or your governing body (57 %)	Students and families (63 %)	Students and families (65 %)

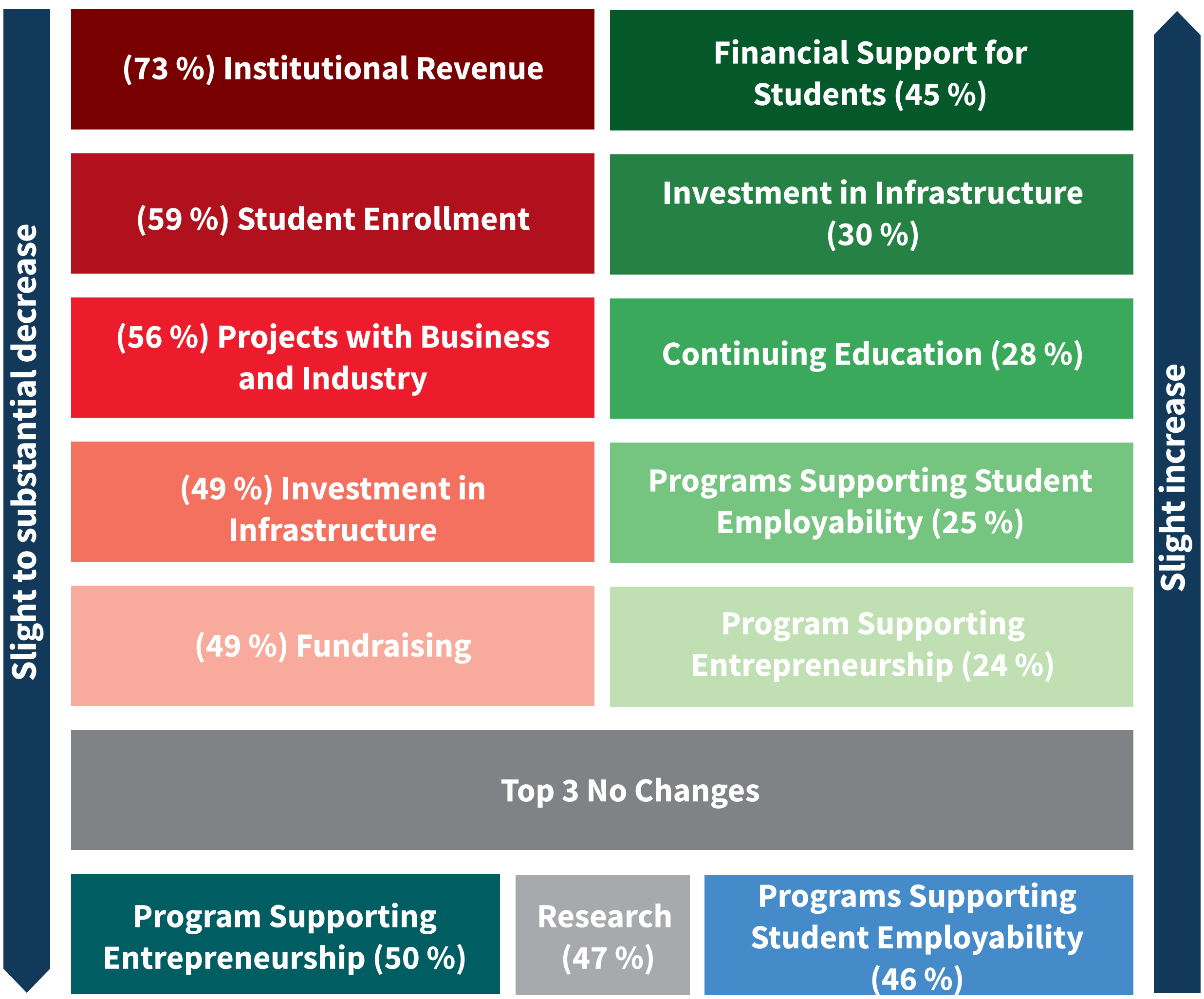
Except in the case of India and Japan, all other cases of the select number of countries from North America, Central and South America, Europe, and Asia/Oceania, coincided with the Global Response and indicated that the influence on decision making relates to a government health authority. For India, the response was government educational authorities, while for Japan it was students and families.

Top	Global	United States	Mexico	Argentina	Brazil	United Kingdom	Spain	India	Japan
	N=487	N=111	N=79	N=17	N=9	N=48	N=12	N=22	N=8
1	Government health authorities (87 %)	Government health authorities (92 %)	Government health authorities (91 %)	Government health authorities (94 %)	Government health authorities (67 %)	Government health authorities (92 %)	Government health authorities (100 %)	Government educational authorities (73 %)	Students and families (50 %)
2	Government educational authorities (73 %)	Students and families (76 %)	Government educational authorities (83 %)	Government educational authorities (94 %)	Faculty and staff (56 %)	Students and families (88 %)	Government educational authorities (67 %)	Students and families (64 %)	Board of trustees or your governing body (25 %)
3	Students and families (59 %)	Faculty and staff (71 %)	Board of trustees or your governing body (64 %)	Board of trustees or your governing body (65 %)	Students and families (56 %)	Faculty and staff (79 %)	Board of trustees or your governing body (33 %)	Government health authorities (59 %)	Faculty and staff (25 %)

Comparing the select number of countries to their respective region, government health authorities was consistently the top response in North America (91%) as well as the USA (92%) and Mexico (91%); in Central and South America (90%) with Argentina (94%) and Brazil (67%) coinciding; and also Europe (92%) with the UK (92%) and Spain (100%). In the case of Asia/Oceania, the top response was government educational authorities (75%), which coincides with India (73%) but is different for Japan, where it was students and families (50%).

Anticipated Areas of Decrease, Increase or No Change

Overall, the Top 5 areas where slight to substantial decreases were anticipated were institutional revenue (73%), student enrollment (59%), projects with business and industry (56%), investment in infrastructure (49%), and fundraising (49%). The Top 5 areas where slight increases were expected were financial support for students (45%), investment in infrastructure (30%), continuing education (28%), programs supporting employability (25%), and programs supporting entrepreneurship (24%). The Top 3 where no changes were expected were programs supporting entrepreneurship (50%), research (47%), and programs supporting student employability (46%).



Across regions, the top area of anticipated decreases was institutional revenue. This was followed by student enrollment in 4 of the 5 regions, the exception being Asia/Oceania where respondents indicated projects with business and industry. The responses for private and public universities were the same for the Top 3.

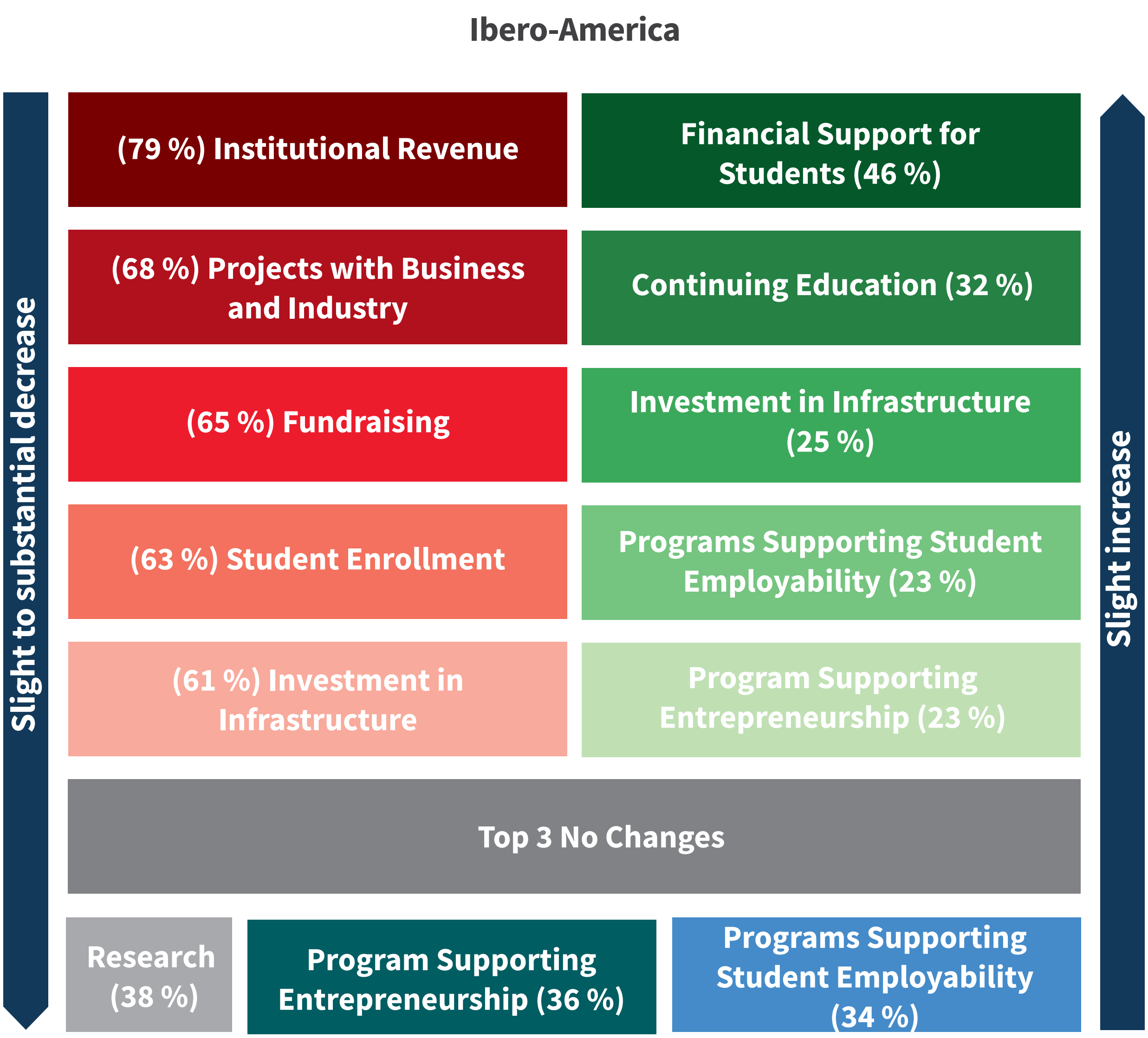
Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/ Middle East	Asia/ Oceania	Private	Public
Decrease 1	Institutional revenue (83 %)	Institutional revenue (81 %)	Institutional revenue (58 %)	Institutional revenue (65 %)	Institutional revenue (68 %)	Institutional revenue (77 %)	Institutional revenue (70 %)
Decrease 2	Student enrollment (66 %)	Student enrollment (68 %)	Student enrollment (53 %)	Student enrollment (50 %)	Projects with business and industry (56 %)	Student enrollment (64 %)	Student enrollment (55 %)
Decrease 3	Projects with business and industry (59 %)	Projects with business and industry (61 %)	Projects with business and industry (52 %)	Continuing education (40 %)	Student enrollment (46 %)	Projects with business and industry (57 %)	Projects with business and industry (55 %)

In the case of increases, the top area of anticipated increases was financial support for student in 3 of the 5 regions, with Africa/Middle East pointing out programs supporting student employability and Asia/Oceania indicating investment in infrastructure. For public and private universities, the responses for the Top 3 was the same.

Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/ Middle East	Asia/ Oceania	Private	Public
Increase 1	Financial support for students (55 %)	Financial support for students (47 %)	Financial support for students (38 %)	Programs supporting student employability (50 %)	Investment in infrastructure (35 %)	Financial support for students (51 %)	Financial support for students (41 %)
Increase 2	Continuing education (29 %)	Continuing education (35 %)	Programs supporting student employability (32 %)	Investment in infrastructure (45 %)	Financial support for students (30 %)	Investment in infrastructure (33 %)	Investment in infrastructure (28 %)
Increase 3	Investment in infrastructure (28 %)	Investment in infrastructure (28 %)	Investment in infrastructure (29 %)	Continuing education (35 %)	Programs supporting entrepre-neurship (28 %)	Continuing education (33 %)	Continuing education (24 %)

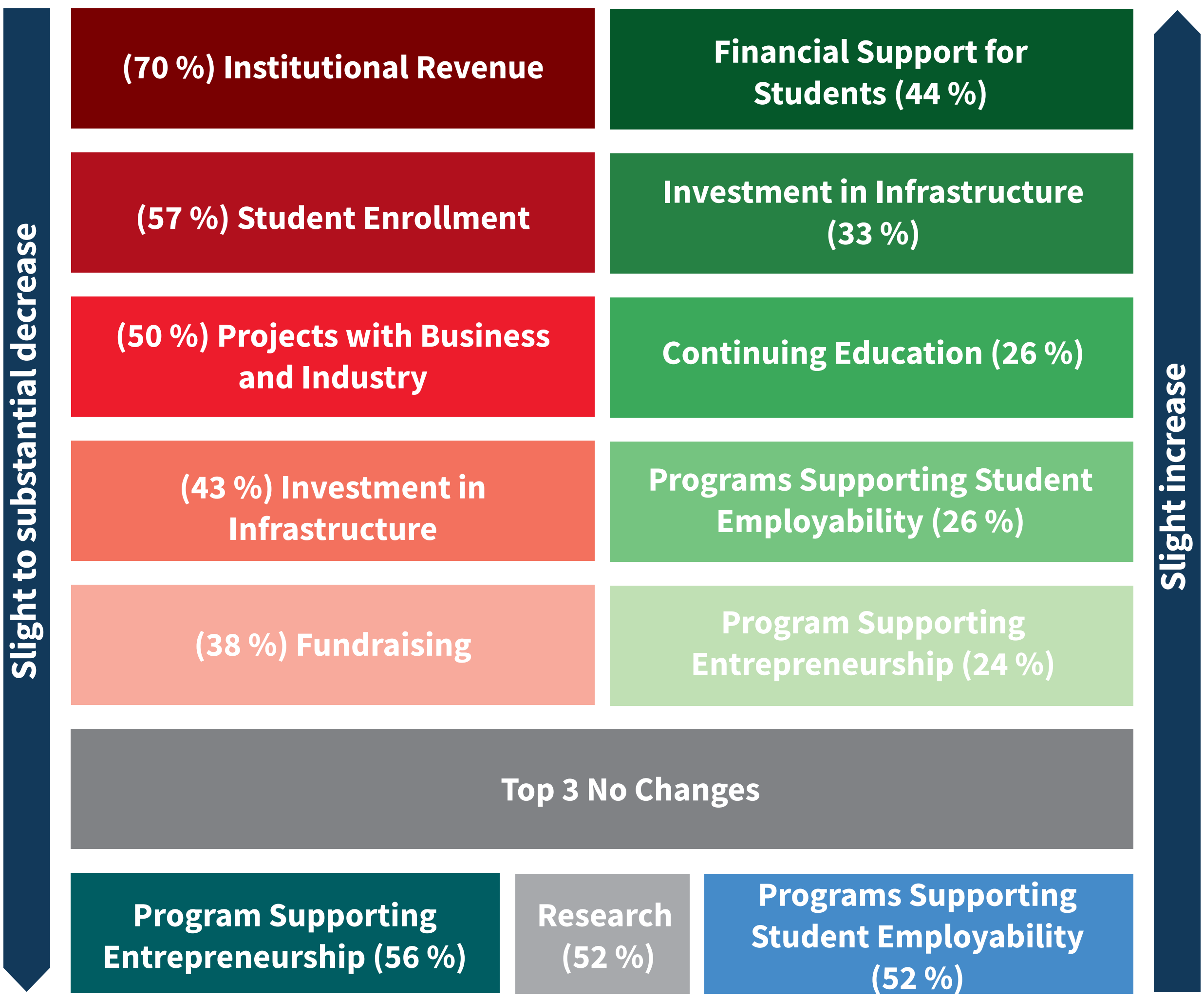
In Ibero-America, the top area where slight to substantial decreases were anticipated was the same as for Global: institutional revenue (79%). This was followed by projects with business and industry (68%), and fundraising.

The Top 3 where slight increases were expected are financial support for students (46%), continuing education (32%), and investment in infrastructure (25%). The Top 3 where no changes were expected are research (38%), programs supporting entrepreneurship (36%), and programs supporting student employability (34%).



For the Rest of the World, the Top 3 areas for slight to substantial decreases are institutional revenue (70%), student enrollment (57%), and projects with business and industry (50%). The Top 5 areas where slight increases were expected are financial support for students (44%), investment in infrastructure (33%), and continuing education. The Top 3 where no changes were expected are programs supporting entrepreneurship (56%), research (52%), and programs supporting student employability (52%). The top responses for each case (decrease, increase, no change) were consistent with the top responses for Global.

Rest of the World



By sector, either at private institutions or at public institutions in both Ibero-America and the Rest of the World, the top area of anticipated decreases was institutional revenue. This was followed by student enrollment, the exception being Ibero-America public institutions where respondents indicated fundraising. Number three in that list, across all categorization, is projects with business and industry.

Decrease	Ibero-America		Rest of the World	
Top	Private	Public	Private	Public
1	Institutional revenue (81 %)	Institutional revenue (76 %)	Institutional revenue (72 %)	Institutional revenue (68 %)
2	Student enrollment (71 %)	Fundraising (69 %)	Student enrollment (56 %)	Student enrollment (57 %)
3	Projects with business and industry (69 %)	Projects with business and industry (67 %)	Projects with business and industry (48 %)	Projects with business and industry (51 %)

In the case of things expected to increase, the top area is financial support for student across all categorization. Student enrollment is second in Ibero-America public institutions, but it does not appear in the Top 3 for the Rest of the World. Similarly, investment in infrastructure is not included in the Top 3 for Ibero-America but it is number two for the Rest of the World both in private and public institutions.

Increase	Ibero-America		Rest of the World	
Top	Private	Public	Private	Public
1	Financial support for students (56 %)	Financial support for students (29 %)	Financial support for students (44 %)	Financial support for students (44 %)
2	Continuing education (36 %)	Student enrollment (27 %)	Investment in infrastructure (38 %)	Investment in infrastructure (30 %)
3	Programs supporting entrepreneurship (30 %)	Continuing education (24 %)	Continuing education (27 %)	Programs supporting student employability (27 %)

Regarding areas where no changes were expected, the perspective by sector is the same described above: Research, programs supporting entrepreneurship, and programs supporting student employability, with the exception of Ibero-American public institutions, where continuing education ranked third.

From the perspective of the select number of countries from North America, Central and South America, Europe, and Asia/Oceania, the top choice coincided with the Global Response and indicated that institutional revenue were most likely to decrease. For Spain, the response was projects with business and industry, while for Japan it was student enrollment.

Top		Global	United States	Mexico	Argentina	Brazil	United Kingdom	Spain	India	Japan
		N=474	N=110	N=78	N=16	N=9	N=46	N=11	N=22	N=8
Decrease	1	Institutional revenue (73 %)	Institutional revenue (84 %)	Institutional revenue (82 %)	Institutional revenue (75 %)	Institutional revenue (89 %)	Institutional revenue (96 %)	Projects with business and industry (73 %)	Institutional revenue (86 %)	Student enrollment (63 %)
	2	Student enrollment (59 %)	Student enrollment (68 %)	Projects with business and industry (74 %)	Fundraising (69 %)	Student enrollment (78 %)	Student enrollment (89 %)	Institutional revenue (64 %)	Projects with business and industry (73 %)	Institutional revenue (63 %)
	3	Projects with business and industry (56 %)	Projects with business and industry (47 %)	Fundraising (71 %)	Projects with business and industry (50 %)	Research (67 %)	Investment in infrastructure (85 %)	Fundraising (55 %)	Fundraising (59 %)	Investment in infrastructure (63 %)

In terms of the select number of countries relative to their respective regions, there was convergence around institutional revenues in North America for both the USA and Mexico, and the same was true for Central/South America and the Caribbean involving Argentina and Brazil. With respect to Europe where the top response related to institutional revenues, for the UK that was also the case but not for Spain where the response was projects with business and industry. For Asia/Oceania, while the top response was institutional revenues, which was true for India, for Japan it was student enrollment.

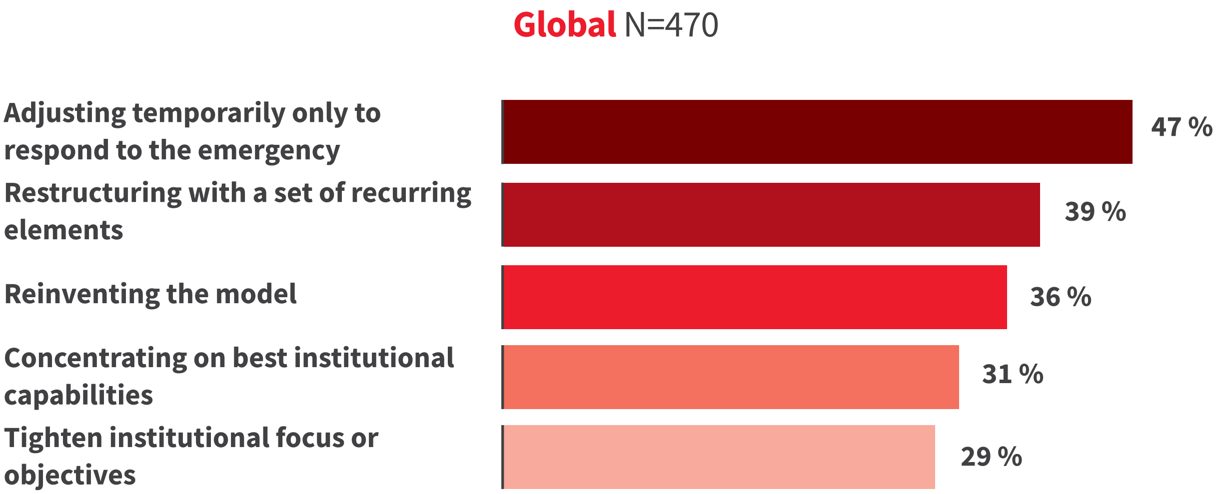
In terms of the top issue mostly likely to experience an increase, half of the countries chose financial support for students, which was the top Global Response as well. The differences were with Brazil (investment in infrastructure), the UK and Japan (programs supporting student employability), and India (programs supporting entrepreneurship).

Top		Global	United States	Mexico	Argentina	Brazil	United Kingdom	Spain	India	Japan
		N=474	N=110	N=78	N=16	N=9	N=46	N=11	N=22	N=8
Increase	1	Financial support for students (45 %)	Financial support for students (61 %)	Financial support for students (61 %)	Financial support for students (50 %)	Investment in infrastructure (33 %)	Programs supporting student employability (57 %)	Financial support for students (36 %)	Programs supporting entrepre-neurship (41 %)	Programs supporting student employability (13 %)
	2	Investment in infrastructure (30 %)	Investment in infrastructure (33 %)	Continuing education (31 %)	Investment in infrastructure (50 %)	Continuing education (33 %)	Financial support for students (50 %)	Investment in infrastructure (36 %)	Investment in infrastructure (41 %)	Programs supporting entrepre-neurship (13 %)
	3	Continuing education (28 %)	Fundraising (28 %)	Programs supporting student employability (24 %)	Continuing education (44 %)	Financial support for students (22 %)	Programs supporting entrepre-neurship (46 %)	Programs supporting entrepre-neurship (27 %)	Programs supporting student employability (27 %)	Fundraising (13 %)

Comparing the select countries with their respective regions, there was convergence only in the case of the USA and Mexico (North America). In Central/South America and the Caribbean, the top response of financial support for students was shared by Argentina but different in Brazil (investment in infrastructure). In Europe, the same was true as the top response was also financial support for students, shared by Spain but different in the UK (programs supporting student employability). In Asia/Oceania, the results were completely divergent, as the region as a whole indicated investment in infrastructure while India stressed programs supporting entrepreneurship and Japan pointed out programs supporting student employability.

Impact on Financial Model

Not surprisingly, most institutions opined that they were adjusting temporarily as a result of COVID-19, followed by restructuring with a set of recurrent elements, and slightly less reinventing.

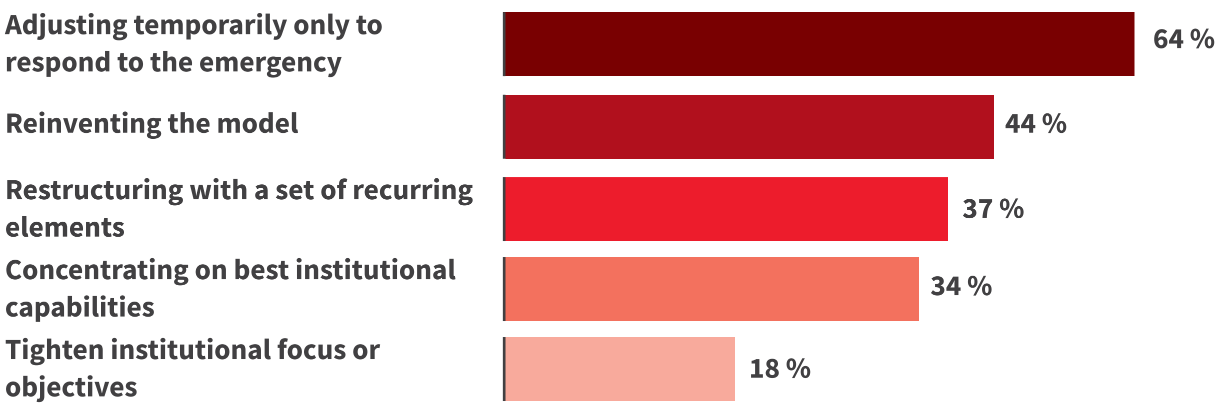


The top response was also consistent across regions. Restructuring was the second most frequent response in 3 of the 5 regions (North America, Europe and Asia/Oceania). By denomination, a higher number of privates were adjusting temporarily than were publics (51% vs 44%), while restructuring was higher among publics (42%) than privates (34%), and reinventing was higher for privates (40%) than for publics (33%).

Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/ Middle East	Asia/ Oceania	Private	Public
1	Adjusting temporarily (44 %)	Adjusting temporarily (57 %)	Adjusting temporarily (43 %)	Adjusting temporarily (55 %)	Adjusting temporarily (52 %)	Adjusting temporarily (51 %)	Adjusting temporarily (44 %)
2	Restructuring with a set of recurring elements (42%)	Reinventing the model (52 %)	Restructuring with a set of recurring elements (36 %)	Reinventing the model (40 %)	Restructuring with a set of recurring elements (38 %)	Reinventing the model (40 %)	Restructuring with a set of recurring elements (42 %)
3	Reinventing the model (35 %)	Restructuring with a set of recurring elements (39 %)	Reinventing the model (30 %)	Restructuring with a set of recurring elements (25 %)	Reinventing the model (37 %)	Restructuring with a set of recurring elements (34 %)	Reinventing the model (33 %)

In Ibero-America, most institutions opined that they were adjusting temporarily as a result of COVID-19, followed by reinventing the model and restructuring.

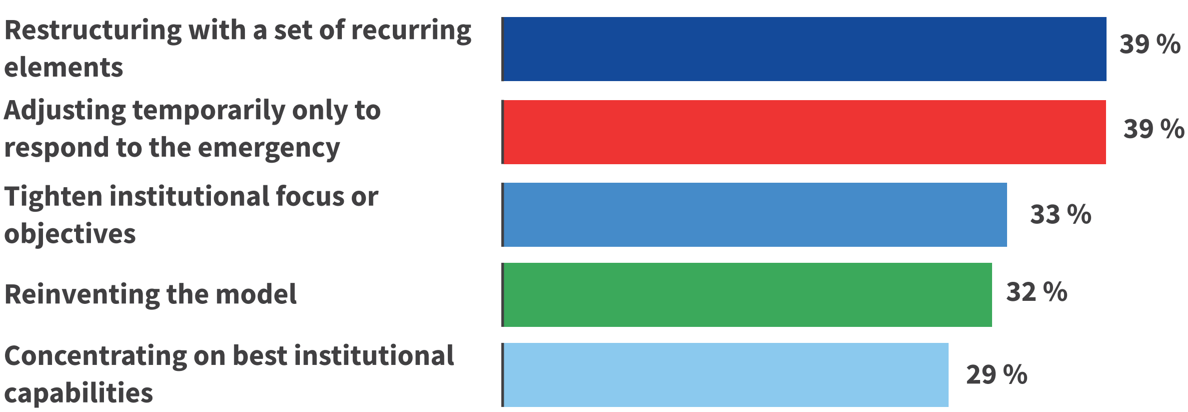
Ibero-America N=146



Results observed for Ibero-America are similar to the ones observed for the Rest of the World, where adjusting temporarily as a result of COVID-19 and restructuring were number one, followed by tightening objectives and reinventing the model.

For Global, adjusting temporarily was also the top choice.

Rest of the World N=323



By sectors, in Ibero-America, private institution's perspectives were consistent with the top response of adjusting temporarily. However, their number 2 and 3 choices were order relative to Global (reinventing and restructuring compared to restructuring and reinventing). The top choice for private from Rest of the World was also adjusting temporarily but for publics it was restructuring.

Top	Ibero-America		Rest of the World	
	Private	Public	Private	Public
1	Adjusting temporarily only to respond to the emergency (62 %)	Adjusting temporarily only to respond to the emergency (66 %)	Adjusting temporarily only to respond to the emergency (43 %)	Restructuring with a set of recurring elements (45 %)
2	Reinventing the model (45 %)	Reinventing the model (42 %)	Reinventing the model (33 %)	Adjusting temporarily only to respond to the emergency (37 %)
3	Restructuring with a set of recurring elements (38 %)	Restructuring with a set of recurring elements (36 %)	Concentrating on best institutional capabilities (33 %)	Tighten institutional focus or objectives (33 %)

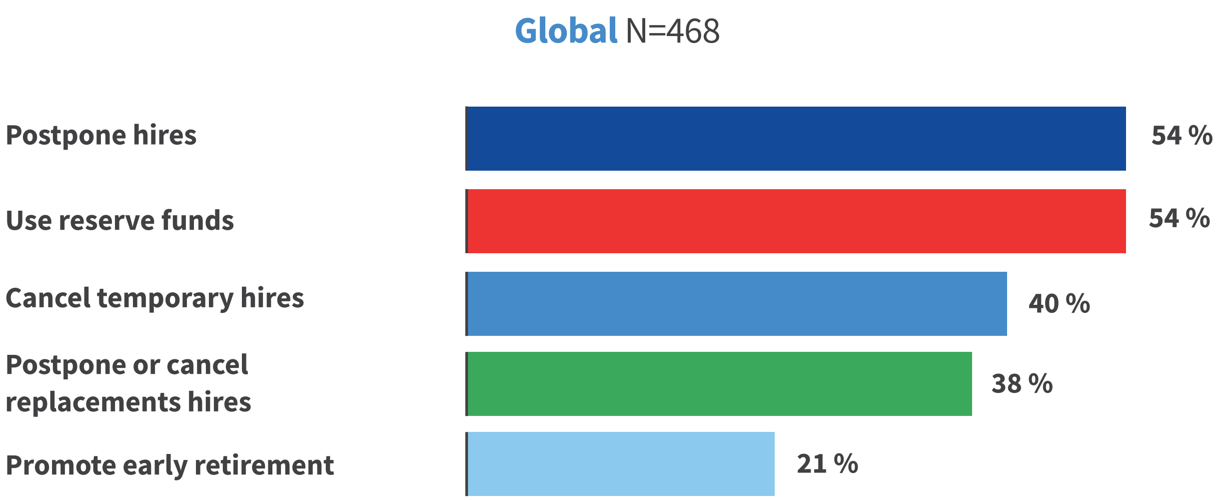
Except in the case of the USA and the UK, all other cases of the select number of countries from North America, Central and South America, Europe, and Asia/Oceania, coincided with the Global Response and indicated that they were adjusting temporarily only to respond to the emergency. For the USA, the top response was restructuring with a set of recurring elements. For the UK, it involved concentrating on best institutional capabilities.

Top	Global	United States	Mexico	Argentina	Brazil	United Kingdom	Spain	India	Japan
	N=470	N=110	N=76	N=16	N=9	N=46	N=11	N=22	N=8
1	Adjusting temporarily only to respond to the emergency (47 %)	Restructuring with a set of recurring elements (45 %)	Adjusting temporarily only to respond to the emergency (68 %)	Adjusting temporarily only to respond to the emergency (75 %)	Adjusting temporarily only to respond to the emergency (67 %)	Concentrating on best institutional capabilities (48 %)	Adjusting temporarily only to respond to the emergency (91 %)	Adjusting temporarily only to respond to the emergency (64 %)	Adjusting temporarily only to respond to the emergency (50 %)
2	Restructuring with a set of recurring elements (39 %)	Tighten institutional focus or objectives (39 %)	Reinventing the model (44 %)	Reinventing the model (56 %)	Tighten institutional focus or objectives (56 %)	Tighten institutional focus or objectives (46 %)	Restructuring with a set of recurring elements (9 %)	Tighten institutional focus or objectives (45 %)	Concentrating on best institutional capabilities (38 %)
3	Reinventing the model (36 %)	Reinventing the model (27 %)	Restructuring with a set of recurring elements (39 %)	Concentrating on best institutional capabilities (56 %)	Reinventing the model (33 %)	Restructuring with a set of recurring elements (41 %)	Reinventing the model (9 %)	Reinventing the model (45 %)	Reinventing the model (13 %)

From a perspective of the select countries relative to their respective regions, there was a convergence in response in Central/South America and the Caribbean with both Argentina and Brazil, as well as in Asia/Oceania with India and Japan. In North America, where the top response was adjusting temporarily (44%) which was shared by Mexico (68%), the USA indicated restructuring (45%). In Europe, where the top choice was also adjusting temporarily (43%) which coincided with Spain (91%), for the UK it was concentrating on best institutional capabilities.

Financial Measures

Overall, more than half of respondents pointed out that they were planning to postpone hires (54%) and use reserve funds (54%), followed by intentions to cancel temporary hires (40%), postpone or cancel replacement hires (38%), and promote early retirements (21%).

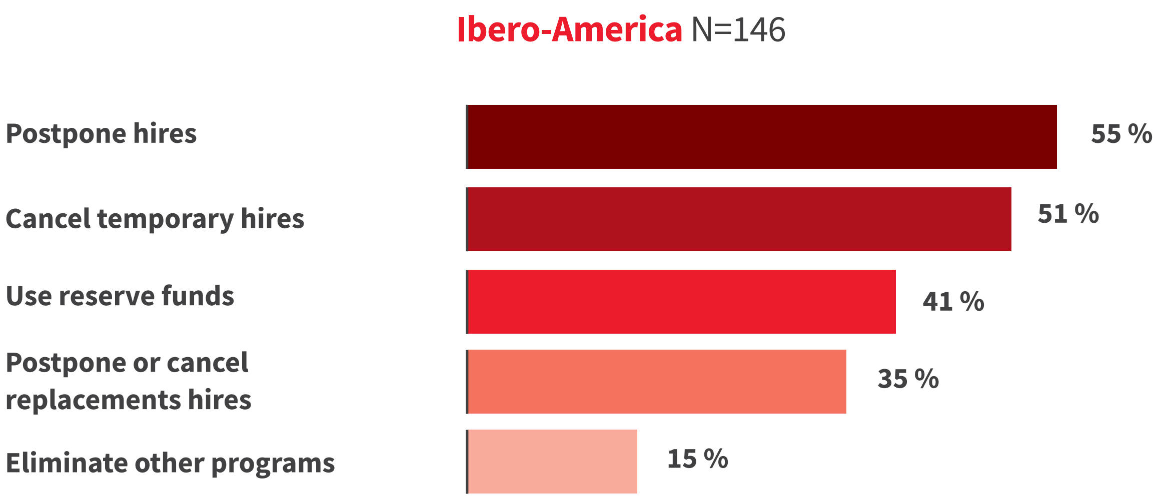


By region, postponing hires was the top response for North America and Central/South America and Caribbean, while it was the use of reserve funds for Europe, Asia/Oceania, and Africa/Middle East.

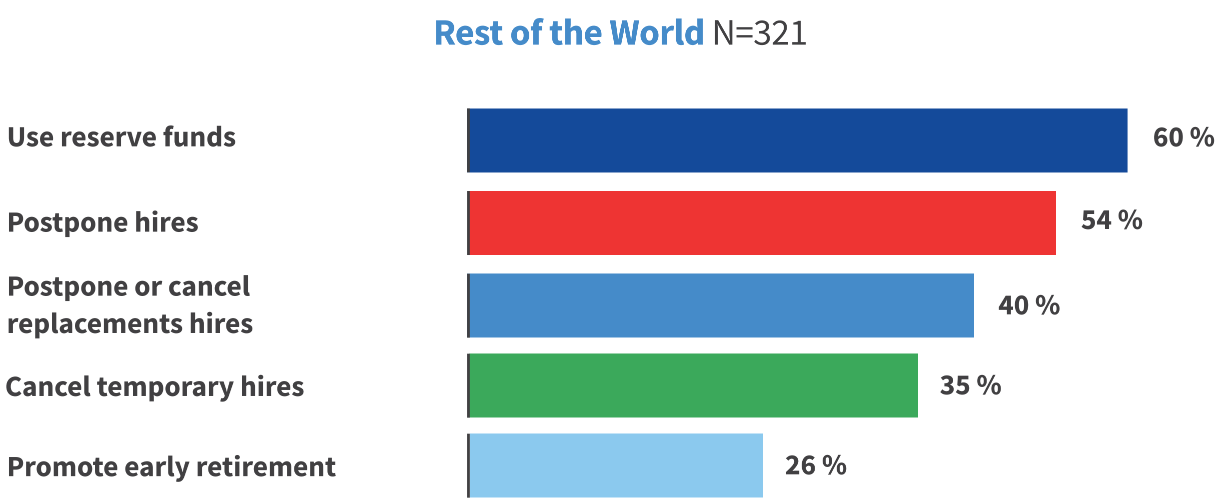
Among privates, at the top of the list was to reduce benefits (54%), while among publics it was the use of reserve funds (56%).

	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/ Middle East	Asia/ Oceania	Private	Public
Postpone hires	70 %	63 %	43 %	40 %	32 %	54 %	54 %
Use reserve funds	53 %	46 %	56 %	50 %	56 %	50 %	56 %

In Ibero-America, most respondents pointed out that they were planning to postpone hires (55%), cancel temporary hires (51%), and to use reserve funds (41%).



In the Rest of the World, the majority talked about using reserve funds (60%) and postponing hires (54%), followed by postponing or canceling replacement hires (40%).



While the use of reserve funds is number 3 for Ibero-America, number 1 for the Rest of the World, and number 2 for Global, canceling temporary hires is so frequent a choice (51%) in Ibero-America that it became part of the Top 3 globally.

By sector, the top choices in Ibero-America related to postponing or canceling hires, in the Rest of the World is the use reserve funds.

Top	Ibero-America		Rest of the World	
	Private	Public	Private	Public
1	Postpone hires (58 %)	Cancel temporary hires (53 %)	Use reserve funds (57 %)	Use reserve funds (61 %)
2	Cancel temporary hires (51 %)	Postpone hires (51 %)	Postpone hires (49 %)	Postpone hires (57 %)
3	Use reserve funds (45 %)	Postpone or cancel replacements hires (36 %)	Postpone or cancel replacements hires (37 %)	Postpone or cancel replacements hires (42 %)

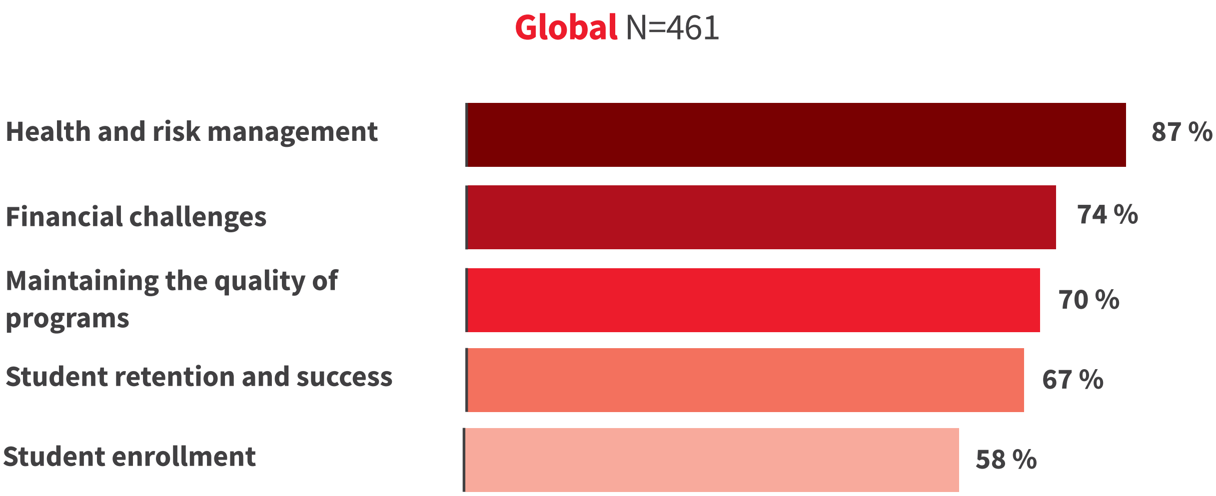
In the case of the select number of countries from North America, Central and South America, Europe, and Asia/Oceania, some coincided with the Global Response of postponing hires (USA, Mexico, Argentina, and the UK), while others stressed the use of reserve funds (Brazil, Spain, India, and Japan).

Top	Global	United States	Mexico	Argentina	Brazil	United Kingdom	Spain	India	Japan
	N=468	N=108	N=76	N=16	N=9	N=46	N=11	N=22	N=8
1	Postpone hires (54 %)	Postpone hires (80 %)	Postpone hires (56 %)	Postpone hires (63 %)	Use reserve funds (67 %)	Postpone hires (76 %)	Use reserve funds (55 %)	Use reserve funds (59 %)	Use reserve funds (50 %)
2	Use reserve funds (54 %)	Use reserve funds (65 %)	Cancel temporary hires (51 %)	Use reserve funds (50 %)	Cancel temporary hires (67 %)	Postpone or cancel replacements hires (59 %)	Postpone hires (27 %)	Reduce benefits (55 %)	Postpone or cancel replacements hires (25 %)
3	Cancel temporary hires (40 %)	Postpone or cancel replacements hires (25 %)	Postpone or cancel replacements hires (40 %)	Eliminate academic programs (31 %)	Postpone hires (67 %)	Use reserve funds (54 %)	Cancel temporary hires (18 %)	Postpone hires (45 %)	Cancel temporary hires (13 %)

The USA and Mexico coincided with the response of North America (postpone hires) as did India and Japan with the response from Asia (use reserve funds). While the top choice in Argentina was the same overall for Central/South America and the Caribbean (postpone hires), for Brazil it was different (use of reserve funds). And in Europe, the UK was convergent with the top response (postpone hires), while in Spain it differed (use of reserve funds).

Priorities

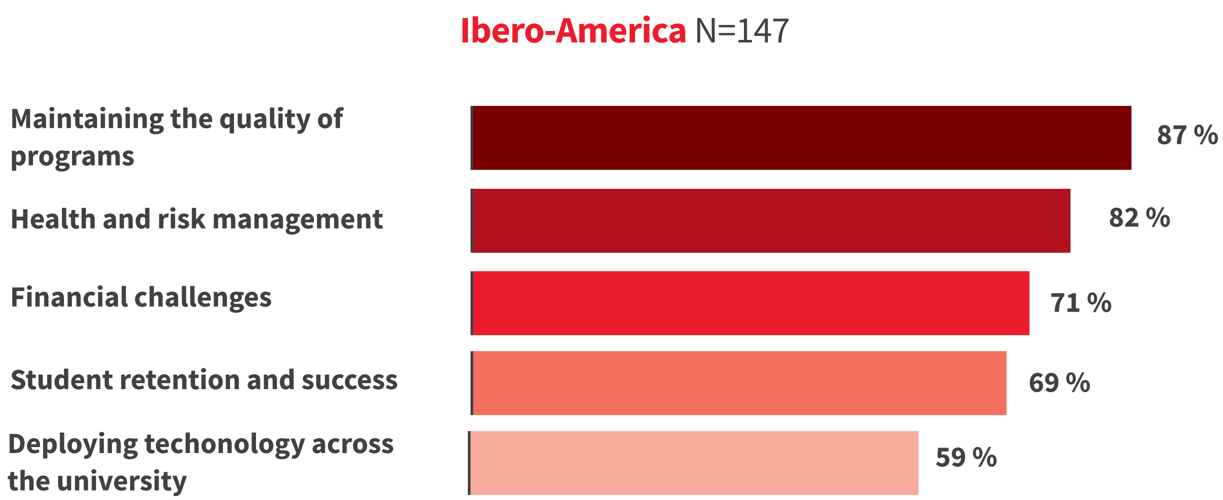
Survey results show that health and risk management, financial challenges, maintaining the quality of programs, student retention and success, and student enrollment are the Top 5 priorities for university leaders around the globe.



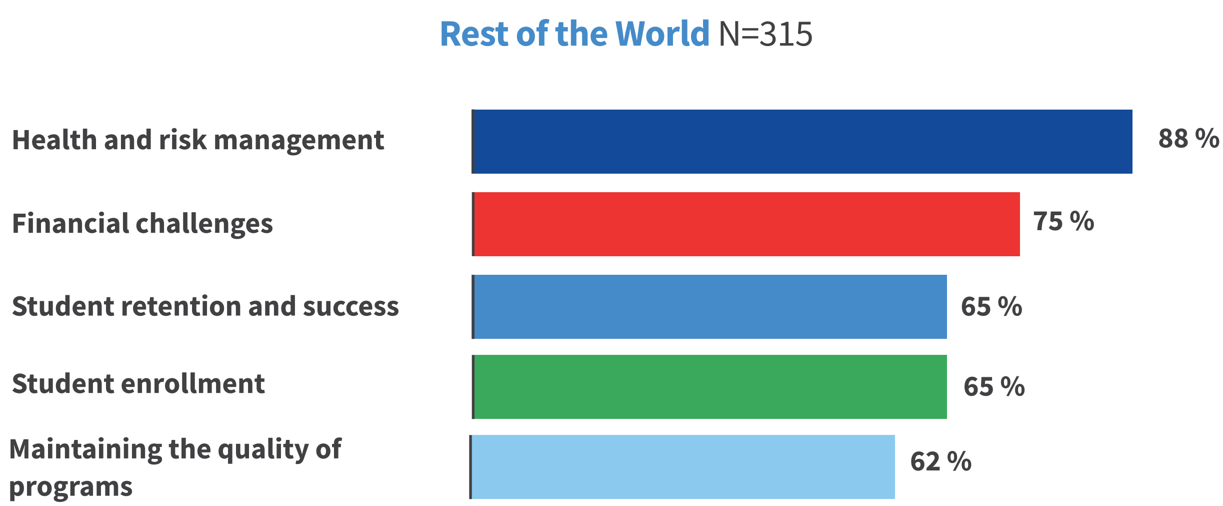
By region, health and risk management is the top response across Europe, Africa/Middle East, and Asia/Oceania, while for North America it is student retention and success, and for Central/South America maintaining the quality of programs. Among private and public institutions, the top responses are the same with slight variations in percentages.

Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/ Middle East	Asia/ Oceania	Private	Public
1	Student retention and success (84 %)	Maintaining the quality of programs (82 %)	Health and risk management (92 %)	Health and risk management (95 %)	Health and risk management (88 %)	Health and risk management (86 %)	Health and risk management (87 %)
2	Health and risk management (83 %)	Health and risk management (79 %)	Maintaining the quality of programs (73 %)	Financial challenges (75 %)	Financial challenges (72 %)	Financial challenges (75 %)	Financial challenges (73 %)
3	Financial challenges (82 %)	Financial challenges (68 %)	Financial challenges (65 %)	Maintaining the quality of programs (70 %)	Maintaining the quality of programs (59 %)	Maintaining the quality of programs (69 %)	Maintaining the quality of programs (71 %)

Survey results show that maintaining the quality of programs, health and risk management, and financial challenges are the Top 3 priorities for university leaders in Ibero-America. For Global the Top 3 are the same except that health and risk management is the top priority.



In the Rest of the World, the Top 3 priorities, are health and risk management, financial challenges, and student retention and success.



By sector, health and risk management is the top response across all categorization, except for private institutions in Ibero-America, where maintaining the quality of programs was choice number one.

Top	Ibero-America		Rest of the World	
	Private	Public	Private	Public
1	Maintaining the quality of programs (88 %)	Health and risk management (87 %)	Health and risk management (93 %)	Health and risk management (86 %)
2	Health and risk management (81 %)	Maintaining the quality of programs (87 %)	Financial challenges (78 %)	Financial challenges (73 %)
3	Student retention and success (74 %)	Financial challenges (74 %)	Student enrollment (59 %)	Student retention and success (71 %)

Responses across the select number of countries from North America, Central and South America, Europe, and Asia/Oceania, were varied relative to the Global Response, where the top choice was health and risk management.

- The top choice for India, Argentina, Brazil, and Japan coincided with the Global Response.
- For Mexico and Spain, the top response involved maintaining the quality of programs.
- For the USA, student retention and success was at the top of the list.
- For the UK, the top selection related to financial challenges.

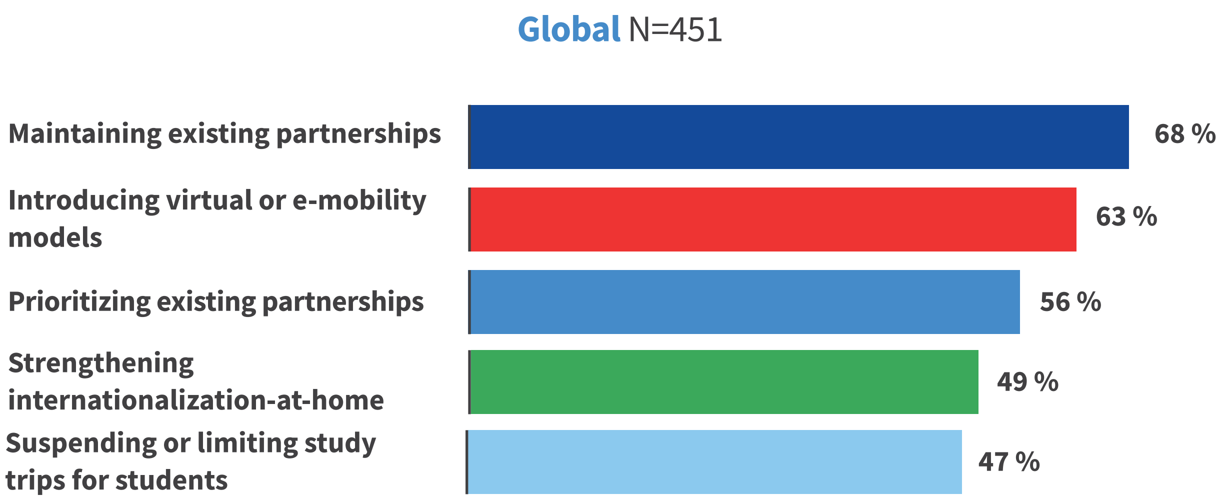
Top	Global	United States	Mexico	Argentina	Brazil	United Kingdom	Spain	India	Japan
	N=451	N=107	N=76	N=16	N=9	N=46	N=11	N=21	N=8
1	Health and risk management (87 %)	Student retention and success (90 %)	Maintaining the quality of programs (91 %)	Health and risk management (94 %)	Health and risk management (100 %)	Financial challenges (91 %)	Maintaining the quality of programs (100 %)	Health and risk management (81 %)	Health and risk management (100 %)
2	Financial challenges (74 %)	Financial challenges (87 %)	Health and risk management (83 %)	Maintaining the quality of programs (88 %)	Financial challenges (78 %)	Health and risk management (89 %)	Health and risk management (100 %)	Financial challenges (71 %)	Financial challenges (100 %)
3	Maintaining the quality of programs (70 %)	Health and risk management (83 %)	Financial challenges (76 %)	Deploying techonology across the university (75 %)	Maintaining the quality of programs (78 %)	Student enrollment (87 %)	Deploying techonology across the university (73 %)	Faculty morale (62 %)	Maintaining the quality of programs (63 %)

Comparing the responses of the select number of countries to their respective region, the following differences were observed:

- The top choice in North America (student retention and success) was the same for the USA but different for Mexico (maintaining quality).
- The number one selection for Central/South America and the Caribbean (maintaining quality) was different than the response in Argentina and Brazil (health and risk management).
- The top selection for Europe (health and risk management) was divergent to the response from the UK (financial challenges) and Spain (maintaining quality).
- In Asia/Oceania, the top response (health and risk management) was completely convergent with the choice in India and Japan.

Internationalization

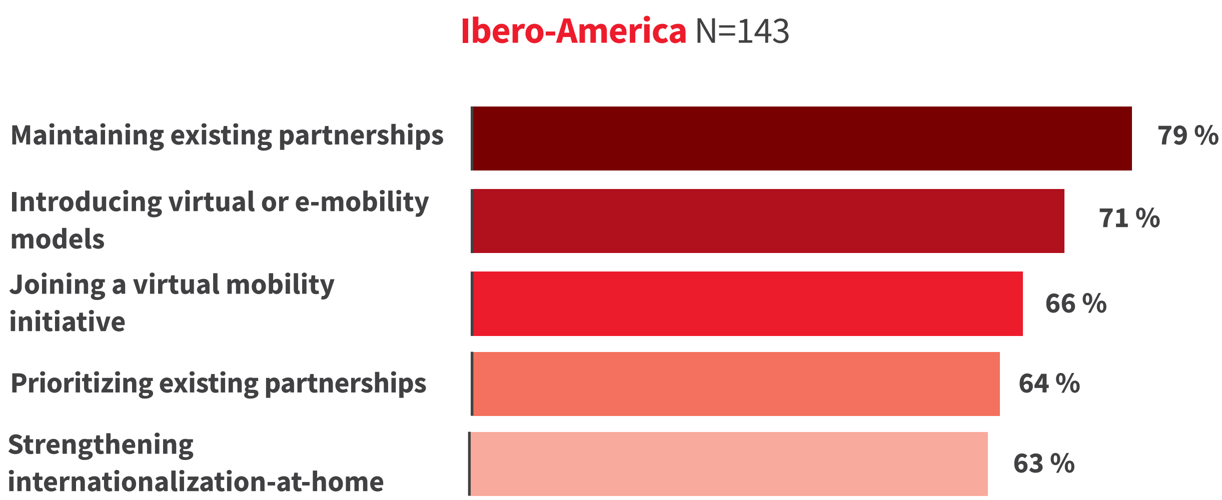
The importance of partnerships was highlighted by the overall responses, as two of the Top 5 responses dealt with partnerships (# 1 maintaining partnerships, # 3 prioritizing existing partnerships). In addition, two of the Top 5 include alternative modes to physical mobility, such as introducing virtual or e-mobility (#2) and strengthening internationalization at home (#4). Suspending or limiting study trips for students was (#5).



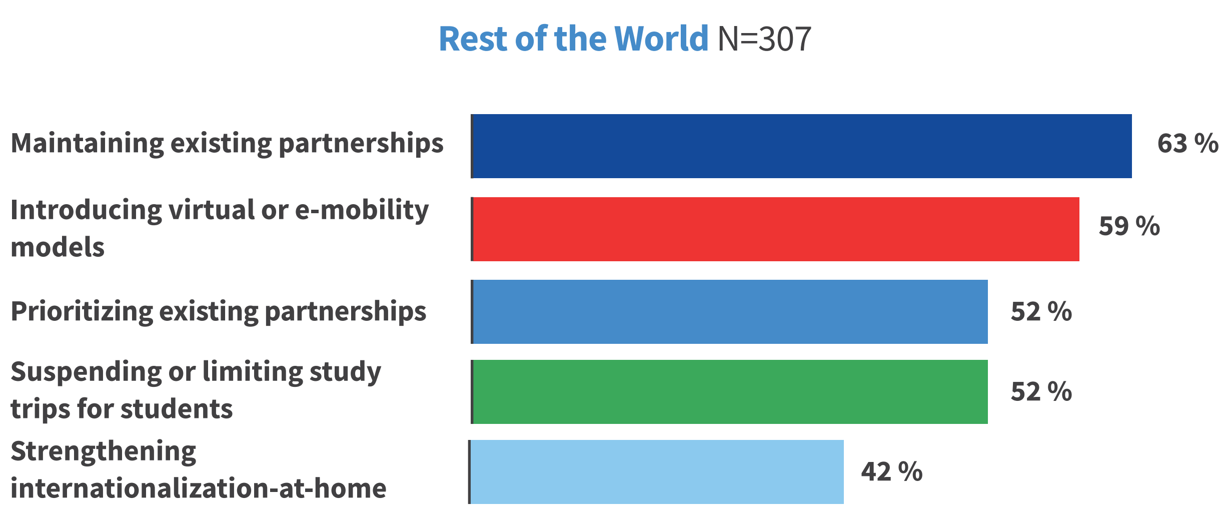
For Europe and Asia/Oceania the top response involves virtual or e-mobility, for Africa/Middle East and Central/South America and the Caribbean maintaining existing partnerships, and for North America, suspending or limiting study trips for students. For privates, the top response was virtual or e-mobility, while for publics, it was maintaining partnerships.

Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/ Middle East	Asia/ Oceania	Private	Public
1	Suspending or limiting study trips for students (60 %)	Maintaining existing partnerships (85 %)	Introducing virtual or e-mobility models (64 %)	Maintaining existing partnerships (78 %)	Introducing virtual or e-mobility models (63 %)	Introducing virtual or e-mobility models (67 %)	Maintaining existing partnerships (70 %)
2	Introducing virtual or e-mobility models (59 %)	Introducing virtual or e-mobility models (76 %)	Prioritizing existing partnerships (64 %)	Prioritizing existing partnerships (67 %)	Maintaining existing partnerships (60 %)	Maintaining existing partnerships (66 %)	Introducing virtual or e-mobility models (61 %)
3	Maintaining existing partnerships (58 %)	Strengthening internationaliza-tion-at-home (67 %)	Maintaining existing partnerships (80 %)	Introducing virtual or e-mobility models (61 %)	Strenghtening international-ization-at-home (48 %)	Prioritizing existing partnerships (55 %)	Prioritizing existing partnerships (56 %)

Ibero-America's Top 5 choices refer to the importance of partnerships and alternative modes to physical mobility. Number one was maintaining partnerships followed by e-mobility, virtual mobility initiatives, prioritizing partnerships and strengthening internationalization at home.



The Top 5 choices in the Rest of the World are almost the same that in Ibero-America, but they incorporate suspending or limiting study trips instead of joining virtual mobility initiatives.



Global results and Rest of the World show a Top 5 that includes suspending study trips (47% and 52% in each case) but this topic is not part of Ibero-America's Top 5. Instead, joining a virtual mobility initiative, is Ibero-America's number 3 (66%).

By sector, maintaining partnerships is the top response across all categorization, except for private institutions in the Rest of the World where virtual or e-mobility models is number 1.

Top	Ibero-America		Rest of the World	
	Private	Public	Private	Public
1	Maintaining existing partnerships (80 %)	Maintaining existing partnerships (77 %)	Introducing virtual or e-mobility models (56 %)	Maintaining existing partnerships (67 %)
2	Introducing virtual or e-mobility models (76 %)	Engaging in online courses with other universities (66 %)	Maintaining existing partnerships (56 %)	Introducing virtual or e-mobility models (61 %)
3	Strengthening internationalization-at-home (69 %)	Introducing virtual or e-mobility models (64 %)	Prioritizing existing partnerships (51 %)	Suspending or imiting study trips for students (53 %)

Responses across the select number of countries from North America, Central and South America, Europe, and Asia/Oceania, were varied relative to the Global Response, where the top choice was maintaining existing partnerships.

- The top choice for Mexico, Argentina, and India,involved introducing virtual or e-mobility models.
- For the UK, Spain, and Brazil, the top response referred to maintaining existing partnerships.
- For the USA and Japan, the top choice was suspending or limiting study trips for students.

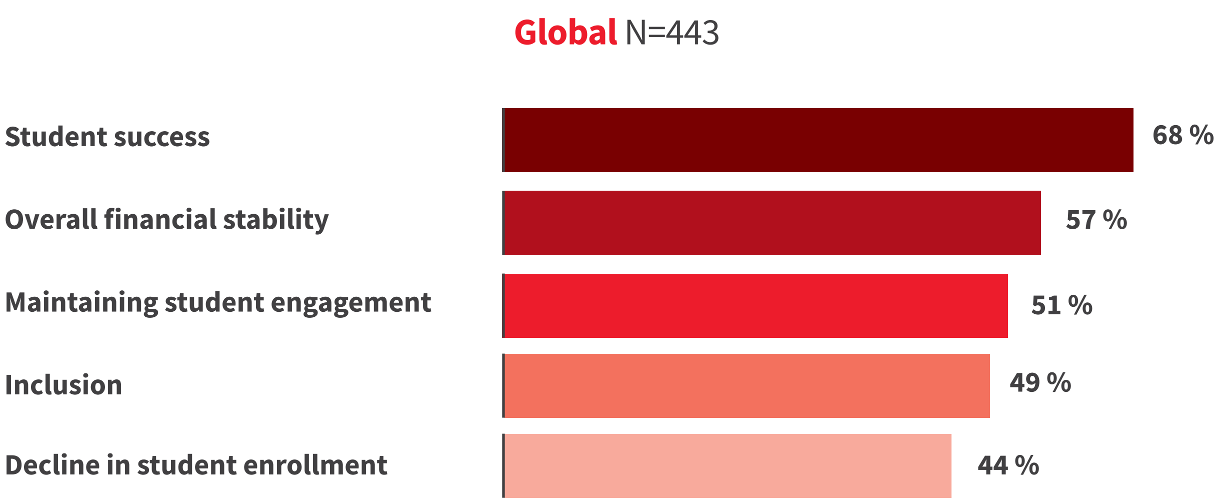
Top	Global	United States	Mexico	Argentina	Brazil	United Kingdom	Spain	India	Japan
	N=451	N=106	N=75	N=15	N=9	N=45	N=11	N=21	N=7
1	Maintaining existing partnerships (68 %)	Suspending or limiting study trips for students (74 %)	Introducing virtual or e-mobility models (73 %)	Introducing virtual or e-mobility models (87 %)	Maintaining existing partnerships (89 %)	Maintaining existing partnerships (73 %)	Maintaining existing partnerships (100 %)	Introducing virtual or e-mobility models (76 %)	Suspending or limiting study trips for students (29 %)
2	Introducing virtual or e-mobility models (63 %)	Cancelling participation in international events (68 %)	Maintaining existing partnerships (72 %)	Maintaining existing partnerships (80 %)	Prioritizing existing partnerships (89 %)	Prioritizing existing partnerships (67 %)	Prioritizing existing partnerships (64 %)	Maintaining existing partnerships (62 %)	Cancelling participation in international events (29 %)
3	Prioritizing existing partnerships (56 %)	Suspending or limiting exchange programs (63 %)	Engaging in online courses with other universities (71 %)	Joining a virtual mobility initiative (73 %)	Strengthening internatio-nalization-at-home (78 %)	Introducing virtual or e-mobility models (51 %)	Strengthening international-ization-at-home (73 %)	Engaging in online courses with other universities (57 %)	Engaging in online courses with other universities (29 %)

There are differences in the responses of the select number of countries with the respective regions in North America, Central/South America and the Caribbean, and Asia/Oceania.

- In North America the choice was suspending or limiting study trips for students, which was the same response for the USA but not for Mexico (virtual or e-mobility models).
- Whereas the top response for Central/South America and the Caribbean was maintaining existing partnerships and the same was true for Brazil, for Argentina it was different (virtual or e-mobility models).
- For Asia/Oceania, where the top selection was the same for the region (virtual or e-mobility models) as for India, it was different for Japan (suspending or limiting study trips for students).
- In Europe, the top selection (maintaining existing partnerships) coincided with the choice indicated by the UK and Spain.

Concerns

Overall, the main concerns were student success, overall financial stability, student engagement, inclusion, and decline in student enrollment.

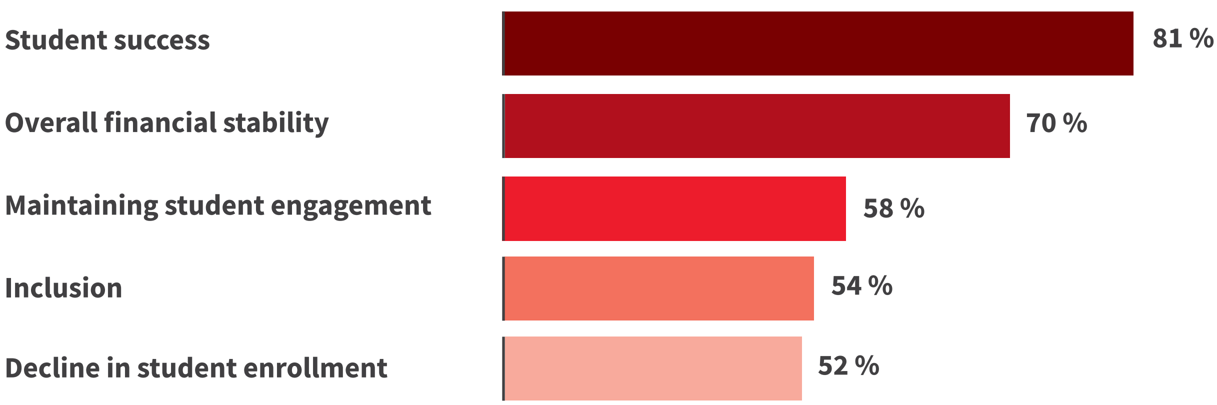


Student success was the top response across all regions. Overall financial stability was the second most cited concern across Europe, Asia/Oceania, and Central/South America, whereas for North America and Africa/Middle East it was maintaining student engagement. The Top 2 were the same among private and public institutions but there were differences in number 3 (decline in student enrollment among privates; inclusion among publics).

Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/ Middle East	Asia/ Oceania	Private	Public
1	Student success (83 %)	Student success (75 %)	Student success (55 %)	Student success (71 %)	Student success (47 %)	Student success (67 %)	Student success (69 %)
2	Maintaining student engagment (66 %)	Overall financial stability (72 %)	Overall financial stability (45 %)	Maintaining student engagment (59 %)	Overall financial stability (44 %)	Overall financial stability (60 %)	Overall financial stability (55 %)
3	Overall financial stability (65 %)	Decline in student enrollment (49 %)	Inclusion (40 %)	Overall financial stability (59 %)	Need for change in strategic priorities (39 %)	Decline in student enrollment (52 %)	Inclusion (54 %)

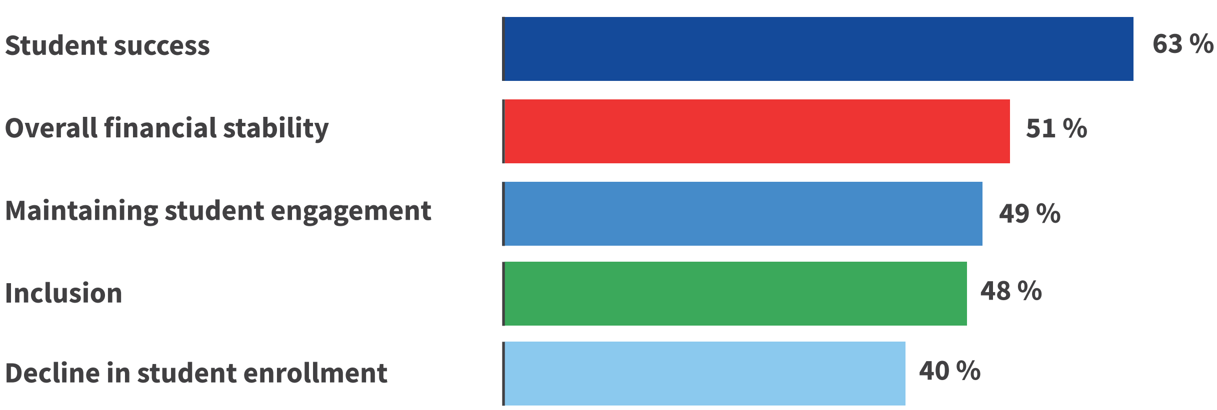
Survey results indicate that student success, financial stability, and maintaining student engagement are the Top 3 concerns among university leaders in Ibero-America, the same as for Global.

Ibero-America N=141



Although with lower percentages, top responses from university leaders in the Rest of the World are just the same as those reported by university leaders in Ibero-America.

Rest of the World N=301



By sector, student success was the top response across all categorizations. Financial stability was number 2, except public institutions in the Rest of the World which included student engagement as number 2 sending financial stability to position number 3. The third most important concern for private institutions in both regions was decline in student enrollment with inclusion in number 3 for Ibero-American public institutions and for institutions from the rest of the world it was overall financial stability.

Top	Ibero-America		Rest of the World	
	Private	Public	Private	Public
1	Student success (82 %)	Student success (79 %)	Student success (54 %)	Student success (67 %)
2	Overall financial stability (72 %)	Overall financial stability (65 %)	Overall financial stability (51 %)	Maintaining student engagement (52 %)
3	Decline in student enrollment (63 %)	Inclusion (65 %)	Decline in student enrollment (44 %)	Overall financial stability (51 %)

Except in the case of the Spain and Japan, the rest of the select number of countries from North America, Central and South America, Europe, and Asia/Oceania, coincided with the Global Response and indicated that their number 1 concern was student success. For the Spain, the top response was overall financial stability. For Japan, it involved a decline in international students.

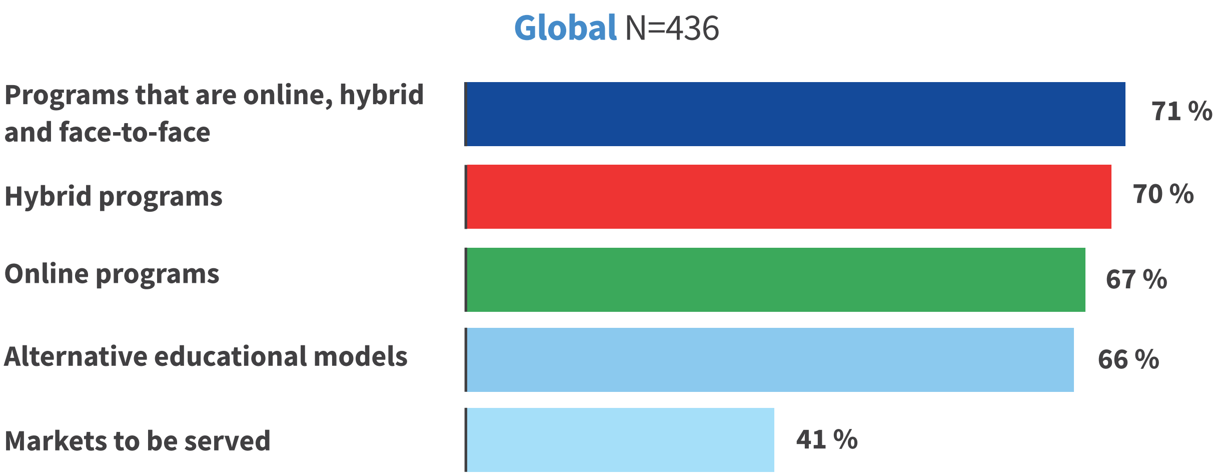
Top	Global	United States	Mexico	Argentina	Brazil	United Kingdom	Spain	India	Japan
	N=443	N=106	N=74	N=14	N=9	N=44	N=11	N=20	N=6
1	Student success (68 %)	Student success (81 %)	Student success (85 %)	Student success (79 %)	Student success (78 %)	Student success (55 %)	Overall financial stability (73 %)	Student success (60 %)	Decline in international students (33 %)
2	Overall financial stability (57 %)	Inclusion (68 %)	Maintaining student engagement (69 %)	Overall financial stability (71 %)	Overall financial stability (67 %)	Overall financial stability (55 %)	Student success (73 %)	Need for change in strategic priorities (60 %)	Decline in student enrollment (33 %)
3	Maintaining student engagement (51 %)	Maintaining student engagement (65 %)	Overall financial stability (66 %)	Inclusion (50 %)	Maintaining student engagement (56 %)	Decline in international students (52 %)	Maintaining student engagement (64 %)	Maintaining student engagement (55 %)	Inclusion (33 %)

Consistent with what is stated above, North America (student success) has a convergence with the USA and Mexico, as does Central/South America and the Caribbean (student success) with Argentina and Brazil. While for Europe the top response (student success) coincides with the UK, it is different in Spain (overall financial stability). For Asia/Oceania, there was also the same response for the region (student success) and India but divergent for Japan (decline in international students).

Looking Forward

Potential Transformation in 3 or More Years

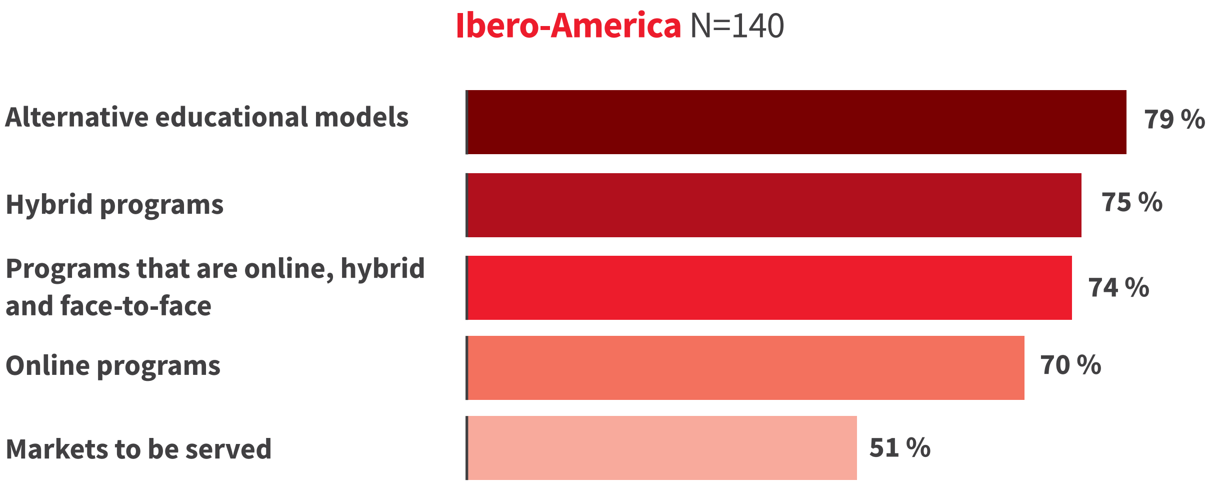
Most leaders responding envision a future where institutions will be offering programs with a portfolio of modes of delivery, including online, hybrid, and F2F.



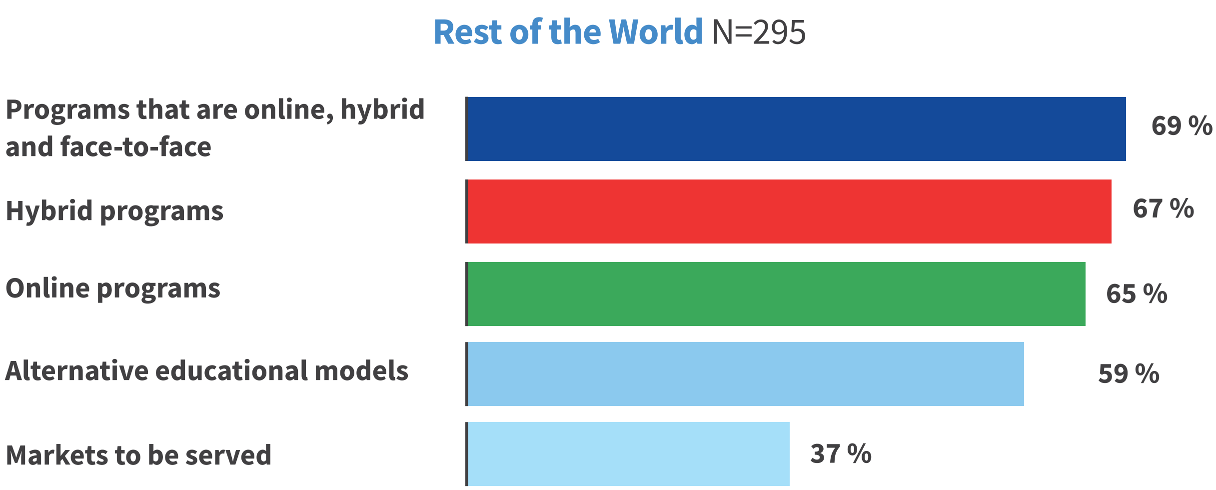
There are differences across regions, as the aforementioned is tops in North America, Europe, and Africa/Middle East, for Central and South America it is hybrid programs, and for Asia/Oceania online programs. For both private and public universities, at the top are programs that are online, hybrid, and F2F.

Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/ Middle East	Asia/ Oceania	Private	Public
1	Programs that are online, hybrid and face-to-face (74 %)	Hybrid programs (79 %)	Programs that are online, hybrid and face-to-face (68 %)	Programs that are online, hybrid and face-to-face (88 %)	Online programs (67 %)	Programs that are online, hybrid and face-to-face (73 %)	Programs that are online, hybrid and face-to-face (69 %)
2	Online programs (73 %)	Alternative educational models (79 %)	Hybrid programs (68 %)	Hybrid programs (82 %)	Programs that are online, hybrid and face-to-face (60 %)	Hybrid programs (72 %)	Hybrid programs (69 %)
3	Hybrid programs (72 %)	Programs that are online, hybrid, and face-to-face (74 %)	Alternative educational models (60 %)	Alternative educational models (82 %)	Hybrid programs (57 %)	Online programs (70 %)	Alternative educational models (65 %)

By contrast, most university leaders in Ibero-America envision a future where institutions will be offering programs with alternative educational models and a portfolio which includes hybrid programs, and programs that are online, hybrid, and F2F.



In the Rest of the World university leaders referred a future with institutions offering, primarily, programs that are online, hybrid, and F2F and a portfolio which include hybrid programs, online programs, and alternative educational models. This is similar to Global.



By sector, the most common response in both private and public institutions of Ibero-America referred to a future with alternative educational models. In the Rest of the World, private and public institutions primarily envision future with programs that are online, hybrid, and F2F.

Top	Ibero-America		Rest of the World	
	Private	Public	Private	Public
1	Alternative educational model (83 %)	Alternative educational model (73 %)	Programs that are online, hybrid, and face-to-face (66 %)	Programs that are online, hybrid, and face-to-face (71 %)
2	Programs that are online, hybrid, and face-to-face (80 %)	Hybrid programs (71 %)	Hybrid programs (65 %)	Hybrid programs (69 %)
3	Hybrid programs (77 %)	Programs that are online, hybrid, and face-to-face (63 %)	Online programs (64 %)	Online programs (66 %)

The majority of the select number of countries from North America, Central and South America, Europe, and Asia/Oceania, coincided with the Global Response, pointing out that their number 1 potential transformation in the next 3 or more years involved alternative models. For the USA, the UK, and India, the top response related to programs that are online, hybrid, and face-to-face.

Top	Global	United States	Mexico	Argentina	Brazil	United Kingdom	Spain	India	Japan
	N=436	N=103	N=73	N=14	N=9	N=46	N=11	N=18	N=6
1	Programs that are online, hybrid, and face-to-face (71 %)	Programs that are online, hybrid, and face-to-face (72 %)	Alternative educational models (82 %)	Alternative educational models (71 %)	Alternative educational models (89 %)	Programs that are online, hybrid, and face-to-face (70 %)	Alternative educational models (64 %)	Programs that are online, hybrid, and face-to-face (78 %)	Alternative educational models (33 %)
2	Hybrid programs (70 %)	Hybrid programs (71 %)	Programs that are online, hybrid, and face-to-face (78 %)	Programs that are online, hybrid, and face-to-face (71 %)	Hybrid programs (89 %)	Hybrid programs (70 %)	Hybrid programs (55 %)	Hybrid programs (72 %)	Hybrid programs (33 %)
3	Online programs (67 %)	Online programs (71 %)	Online programs (77 %)	Hybrid programs (64 %)	Programs that are online, hybrid, and face-to-face (67 %)	Online programs (59 %)	Programs that are online, hybrid, and face-to-face (55 %)	Online programs (72 %)	Programs that are online, hybrid, and face-to-face (33 %)

From the perspective of the select countries relative to their respective regions, there are differences in each and every case.

- In North America, the top choice relates to programs that are online, hybrid, and face-to-face, and this coincides with the USA but is different for Mexico (alternative educational models).
- In Central/South America and the Caribbean, the number 1 choice equally involves hybrid programs and alternative models, where the response is different same in Argentina (alternative educational models and programs that are online, hybrid, and face-to-face) and Brazil (alternative educational models and hybrid programs).
- In Europe, the top selection involved programs that are online, hybrid, and face-to-face plus hybrid programs, the same as the UK but different than Spain (alternative educational models and hybrid programs).
- In Asia/Oceania, the regional response (online programs) was different than India (programs that are online, hybrid, and face-to-face) and Japan (alternative models).

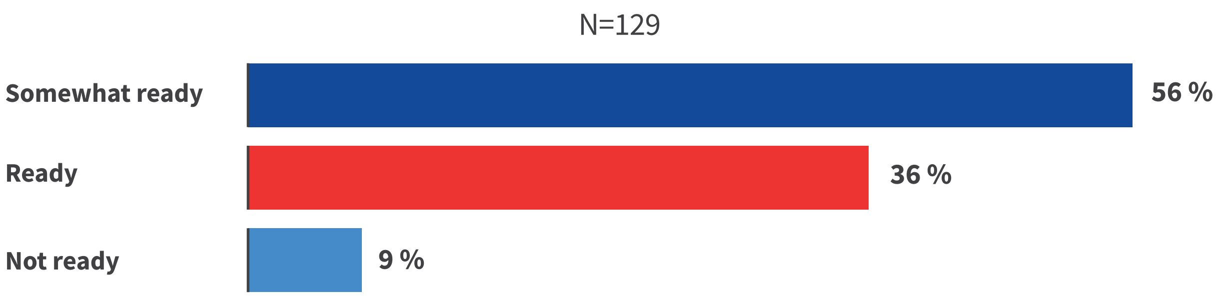
Select Country Analysis

United States

Initial Institutional Reaction

Readiness to Shift to Remote Education

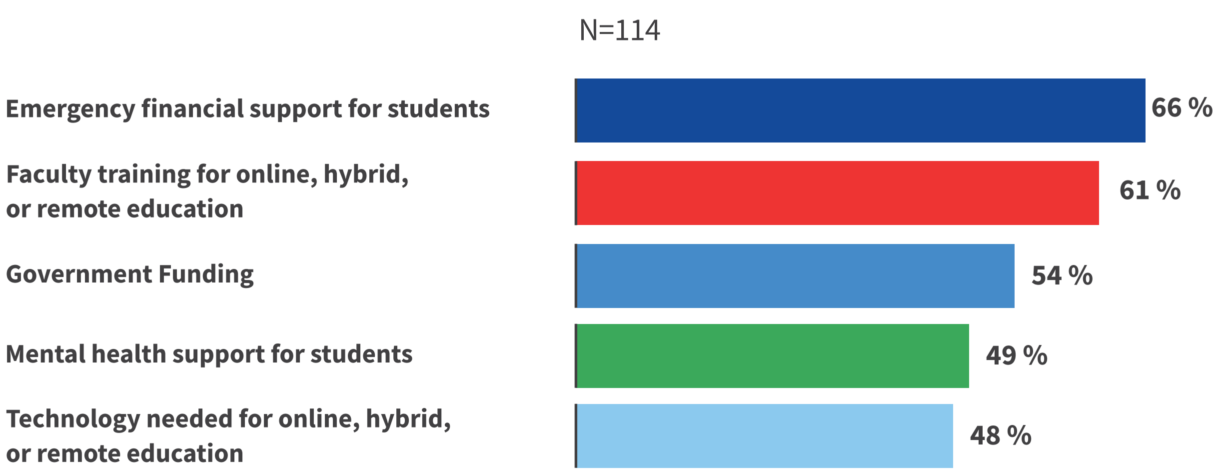
Over one third of USA respondents reported they were ready (36%), while more than half of them mentioned being somewhat ready (56%). Only 9% felt that they were not ready.



USA institutions felt moderately prepared, just as occurred globally where 37% said they were ready, 54% declared they were somewhat ready, and 8% acknowledged they were not ready.

Challenges as a Result of COVID-19

In USA, the top challenges reported by the respondents were emergency financial support for students, faculty training, government funding, mental health support for students and required technology.



Noticeably, financial support for students, first in USA, is fourth (45%) globally; government funding, which is third in USA is not part of the global Top 5; and maintaining academic standards, number 3 (53%) globally, is not included in the Top 5 for the USA.

Preparing for 2020-2021

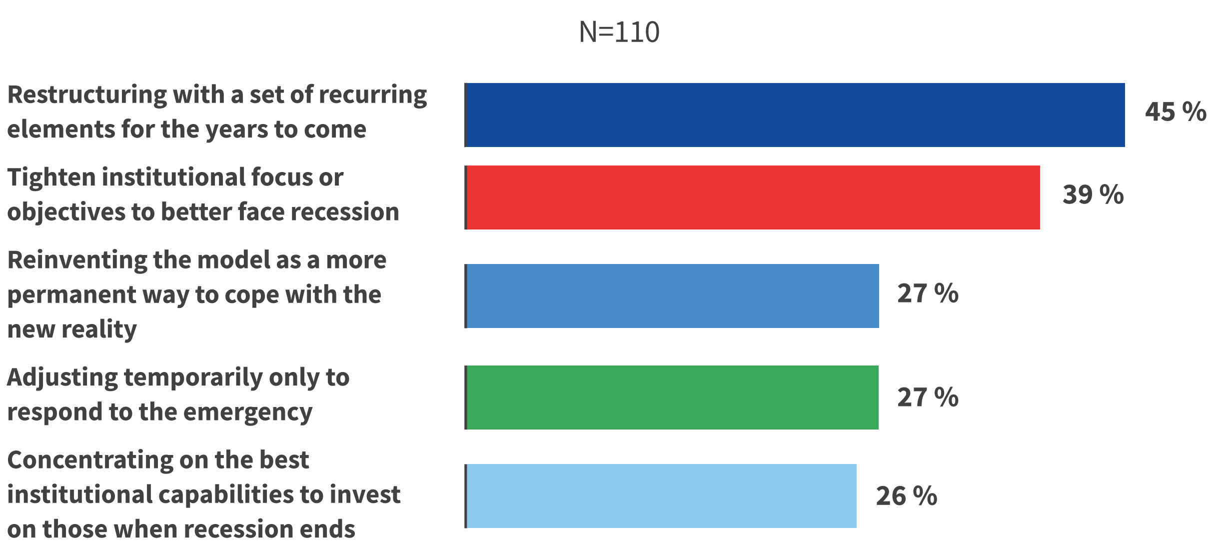
Anticipated Areas of Decrease, Increase or No Change

The USA Top 3 areas for decreases include institutional revenue (84%), student enrollment (68%), and projects with business and industry (47%). The Top 3 for increases show financial support for students (61%), investment in infrastructure (33%), and fundraising (28%). The Top 3 for no change, both in the general perspective and by sector, are programs supporting entrepreneurship (64%), research (62%) and programs for student employability (55%).

The global and the USA results are similar, but the USA's percentages are higher. For instance, regarding possible decreases, institutional revenue (84% vs 73%) or student enrollment (68% vs 59%), or in areas expected to increase, financial support for students (61% vs 45%).

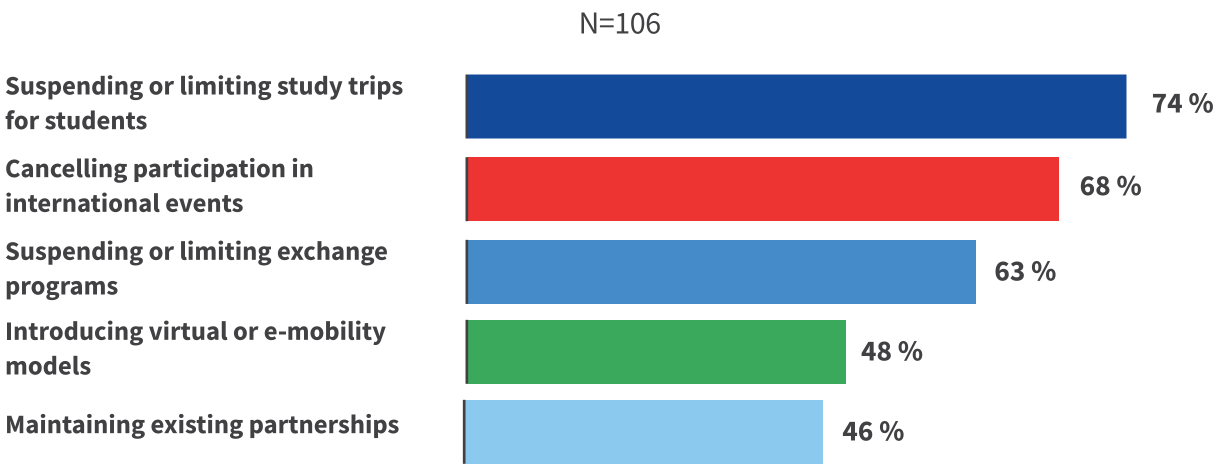
Impact on Financial Model

In the USA, most institutions declared they were restructuring with a set of recurring elements for the years to come. Tightening institutional objectives was number 2 and reinventing the model was number 3. The most frequent choice globally, suggesting actions with a rather short-term effect, was adjusting temporarily only to respond to the emergency (47%) which in the USA perspective, with a 27% frequency, is number 4.



Internationalization

USA's Top 3 internationalization choices seem intended to immediately minimize Covid-19 risks. Suspending or limiting study trips for students is number 1, cancelling participation in international events is 2, and suspending or limiting exchange programs is 3. Even so, choices 4 and 5 acknowledge the importance of partnerships and aim at looking for alternative models to physical mobility.

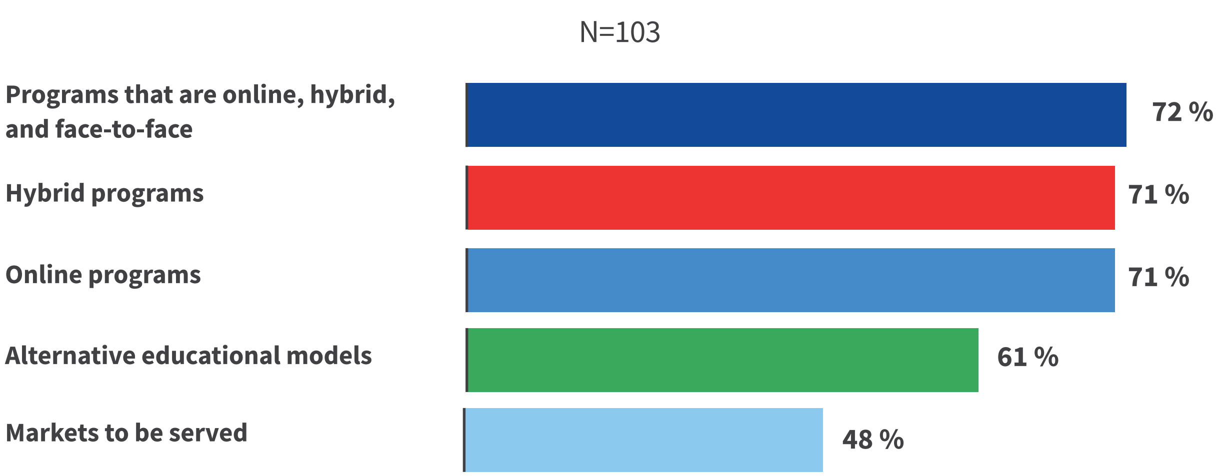


Suspending or limiting study trips, USA's first (74%), is number 5 (47%) in the global results. Similarly, maintaining partnerships, which the USA's fifth (46%) is number 1 globally (68%).

Looking Forward

Potential Transformation in 3 or More Years

Most university leaders in the USA mentioned that their institutions would be offering programs that can be online, hybrid, and face to face (72%), hybrid programs (71%), online programs (71%), and alternative educational models (61%). In addition, results showed that a few of them (48%) would also consider re-viewing the topic of markets to be served.



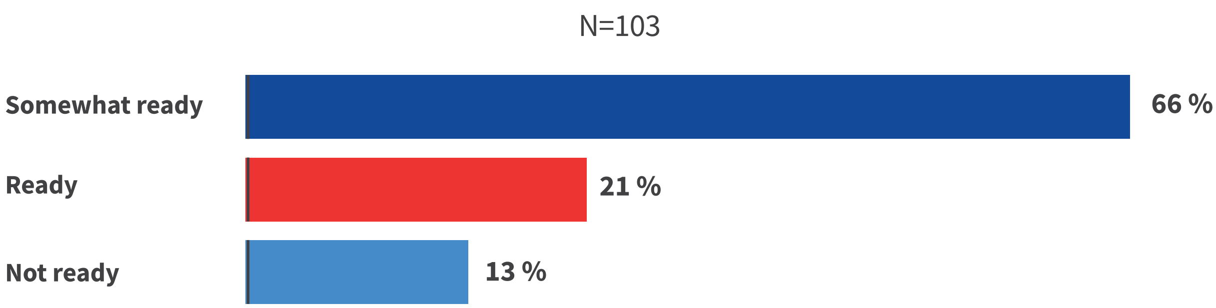
Globally, a system likely to switch from online to hybrid or face to face was also the top choice (71%), followed by hybrid programs (70%) and online programs (67%).

Mexico

Initial Institutional Reaction

Readiness to Shift to Remote Education

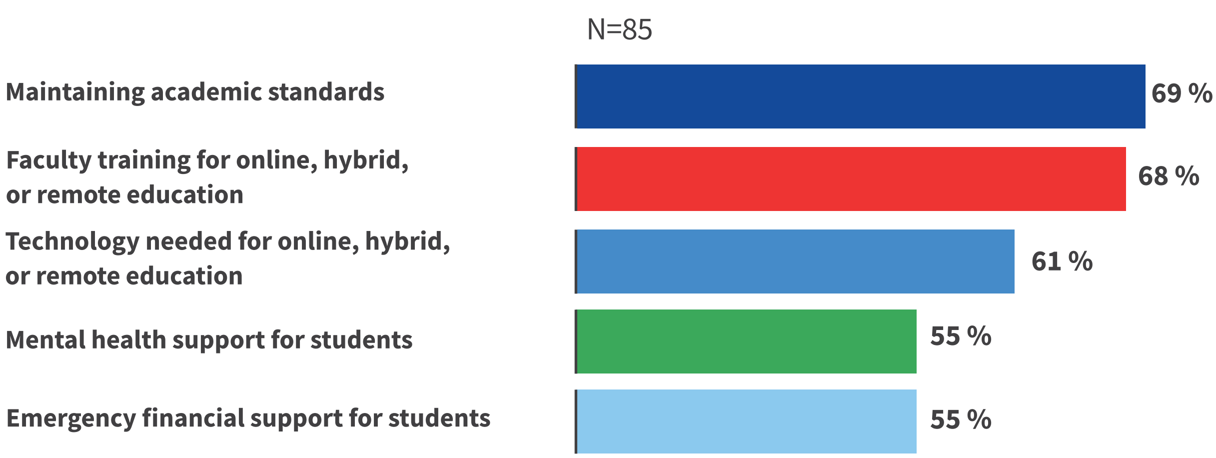
In Mexico, only 21% said that they were ready while the vast majority of respondents (66%) declared that they were somewhat ready. A smaller amount (13%) felt that they were not ready.



Mexico's result on readiness (21%) is lower than the one observed in the global perspective, where 37% of respondents said they were ready, just over half of them (54%) declared that they were moderately prepared, and only 8% acknowledged that they were not ready.

Challenges as a Result of COVID-19

The Top 5 challenges reported by Mexican university leaders were maintaining academic standards, faculty training, required technology, mental health support for students, and emergency financial support for students.



Mexico's top choices correspond to those found in the global perspective, only with a different order. For instance, maintaining academic standards, which is first in Mexico is third globally.

Preparing for 2020-2021

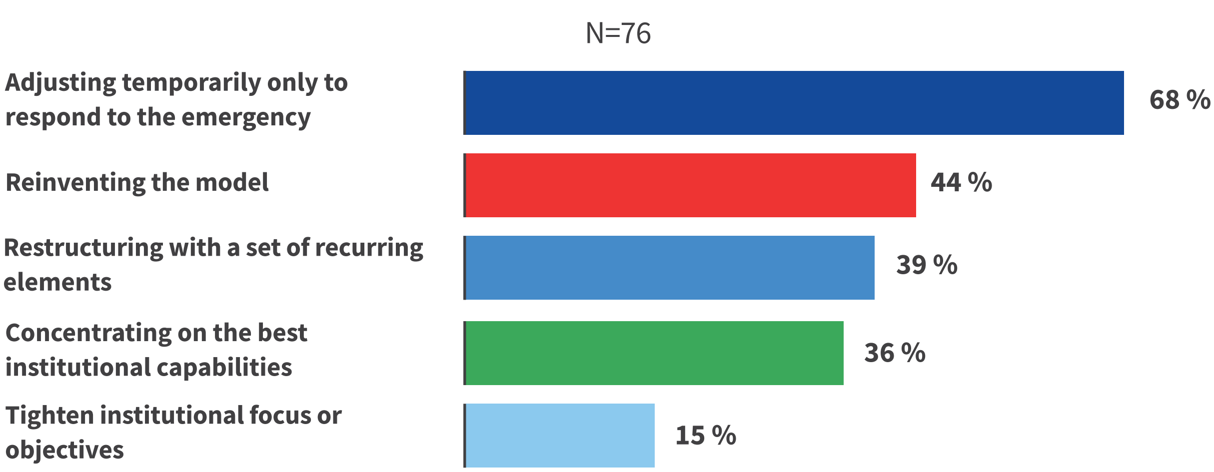
Anticipated Areas of Decrease, Increase or No Change

Institutional revenue (82%), projects with business or industry (71%), and fundraising (71%), were the Top 3 areas where Mexican leaders anticipated slight to substantial decreases. The Top 3 for increases were financial support for students (46%), continuing education (31%), and programs supporting student employability (24%). Survey results indicate that no change is expected in topics such as research, or programs supporting entrepreneurship.

Global and Mexican results are similar, yet there are a few minor differences. Regarding possible decreases, student enrollment (59%) is second globally but fifth in Mexico. On a possible increase, investment in infrastructure (30%) is second globally but it is not included in Mexico's Top 5.

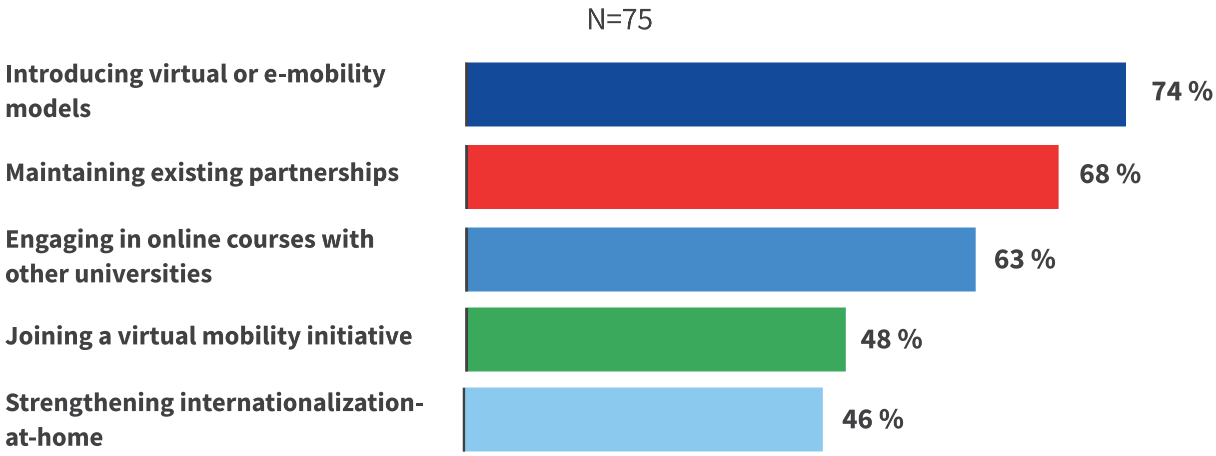
Impact on Financial Model

Mexican leaders declared that adjusting temporarily to respond to the emergency was their primary concern (68% frequency), followed by reinventing the model (44%), restructuring with recurring elements (39%), concentrating on institutional capabilities (36%), and tightening institutional objectives (15%). Adjusting temporarily was also the most frequent choice globally (47%), but it was not as frequent as in Mexico (68%). This might suggest actions intended to have a short-term impact rather than a long-term effect.



Internationalization

Mexico's top choices refer to the importance of e-mobility and partnerships. Number 1 was introducing virtual mobility models (73%), followed by maintaining partnerships (72%), engaging in online courses with other universities (71%), joining virtual mobility initiatives (71%), and strengthening internationalization at home (63%).

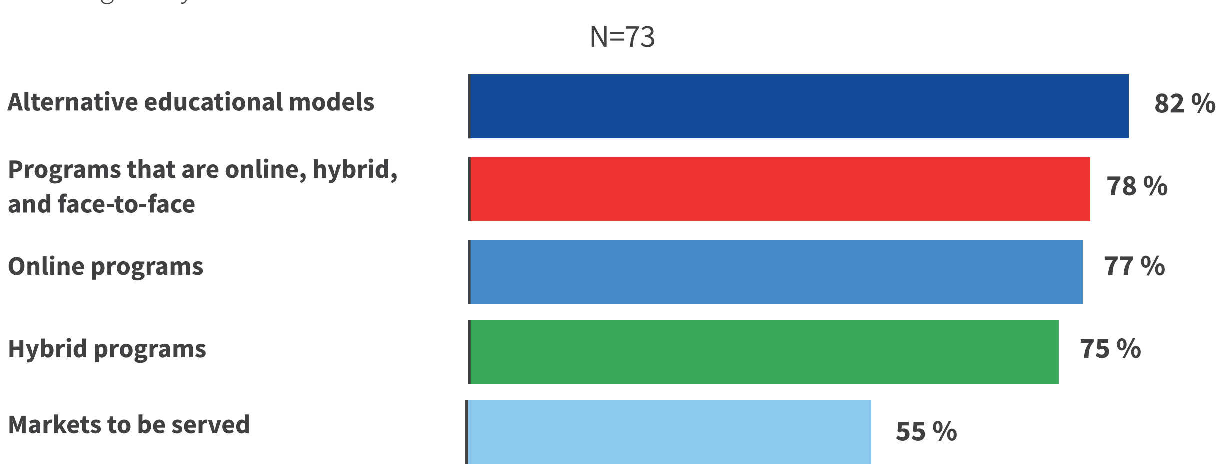


Engaging in online courses and joining virtual mobility initiatives are included in Mexico's internationalization Top 5, but they are not in the Global Top 5. On the other hand, prioritizing existing partnerships and limiting study trips are topics included in the Global Top 5 which are not in the Mexican Top 5.

Looking Forward

Potential Transformation in 3 or More Years

A great number of Mexican leaders (82%) declared that, in the near future, their institutions would implement alternative educational models or (78%) models that would go from online to hybrid or face to face (which, with 71%, was also the top choice globally). In addition, some leaders mentioned online programs (77%) or hybrid programs (75%), while others (55%) said that they intended to consider the topic of markets to be served. According to survey results, all of these ideas were similar to those expressed by most university leaders globally.

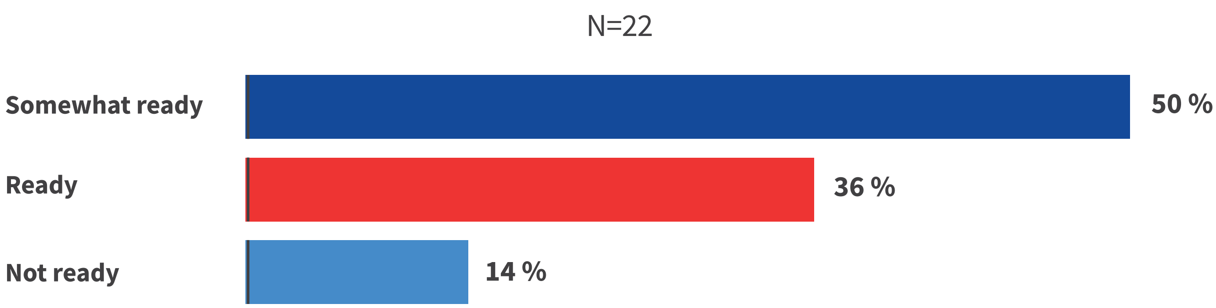


Argentina

Initial Institutional Reaction

Readiness to Shift to Remote Education

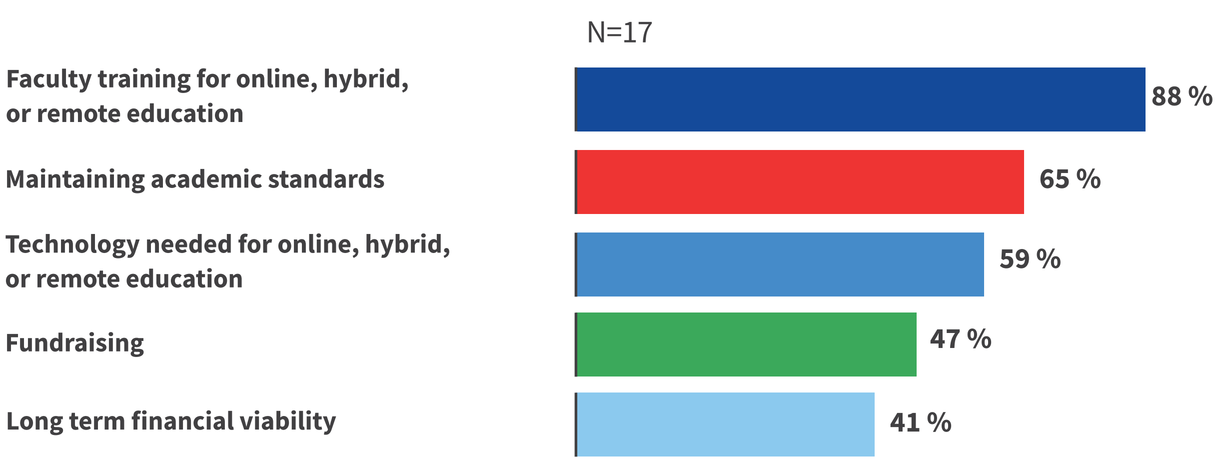
In Argentina, while 36% said that they were ready most leaders (50%), declared that they were somewhat ready and a smaller amount (14%) felt that they were not ready.



Argentina's results on readiness are similar to Global results where 37% said they were ready, 54% declared they were somewhat ready, and 8% acknowledged that they were not ready.

Challenges as a Result of COVID-19

The Top 5 challenges reported by Argentinian universities were: faculty training, maintaining academic standards, required technology, fundraising, and long term financial viability.



Fundraising and long term financial viability, fourth and fifth in Argentina, are not in the global Top 5. In turn, financial support for students (45%) and mental health support for students (40%) are the topics which, respectively, appear as fourth and fifth in the global perspective.

Preparing for 2020-2021

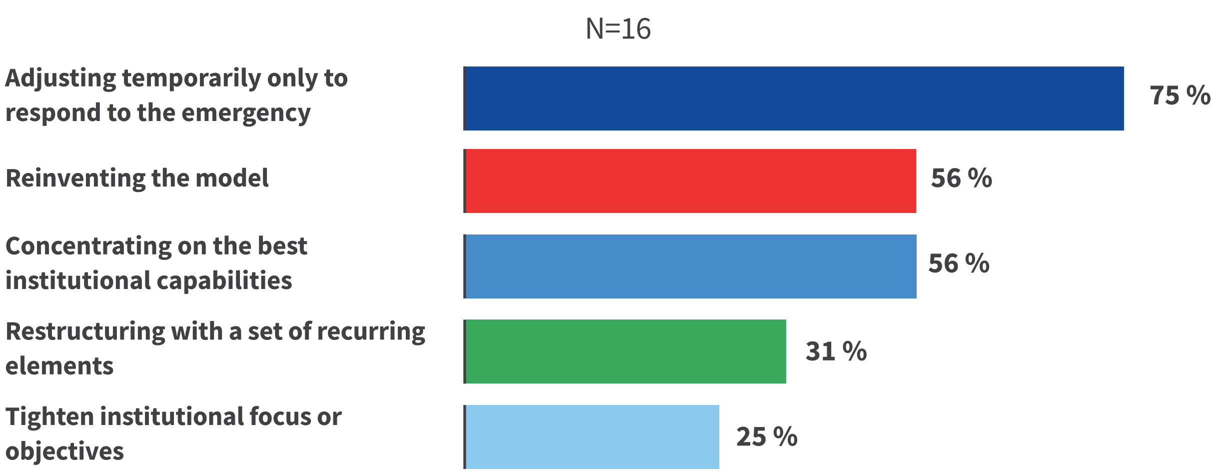
Anticipated Areas of Decrease, Increase or No Change

Institutional revenue (75%), fundraising (69%), and student enrollment (50%), were the Top 3 areas where Argentinian leaders anticipated slight to substantial decreases. The Top 3 for increases were investment in infrastructure (50%), financial support for students (50%), and continuing education (44%). Survey results indicate that no change is expected in topics such as programs supporting student employability, or programs supporting entrepreneurship.

Global and Argentinian results are similar, yet there are a few minor differences. Regarding possibilities of decrease, student enrollment, with 59%, is second globally but third in Argentina. Regarding possible increase, investment in infrastructure, with 30%, is second globally but it is first in Argentina.

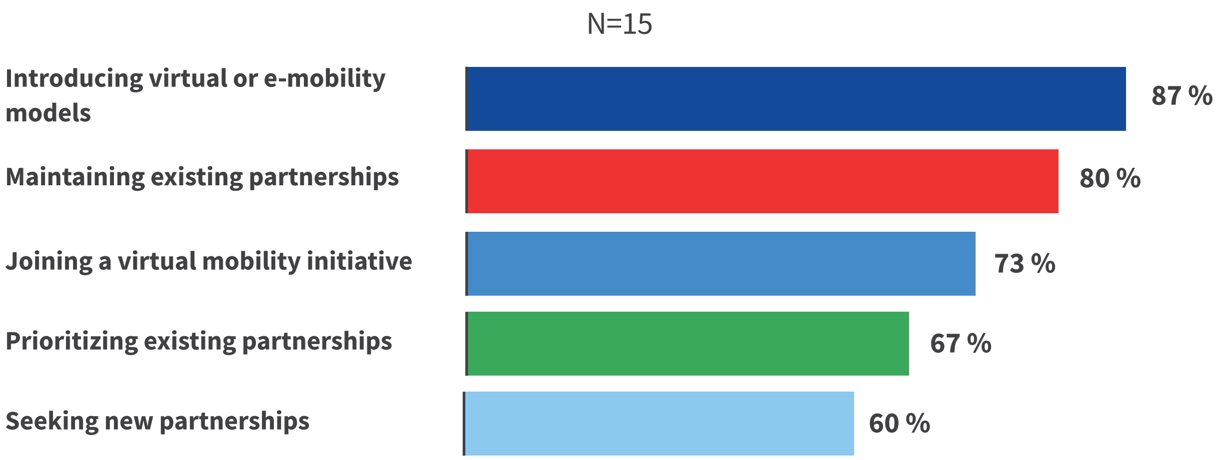
Impact on Financial Model

Argentinian leaders declared that adjusting temporarily to respond to the emergency was their main concern (75% frequency), followed by reinventing the model (56%), concentrating on institutional capabilities (56%), restructuring with recurring elements (31%), and tightening institutional objectives (25%). Adjusting temporarily was also the most frequent choice globally (47%), but it was not as frequent as in Argentina (75%). This might suggest actions intended to have a short-term impact rather than a long-term effect.



Internationalization

Argentina's top choices refer to the importance of e-mobility and partnerships. Number 1 was introducing virtual mobility models (87%), followed by maintaining partnerships (80%), joining virtual mobility initiatives (71%), prioritizing existing partnerships (67%), and seeking new partnerships (60%).

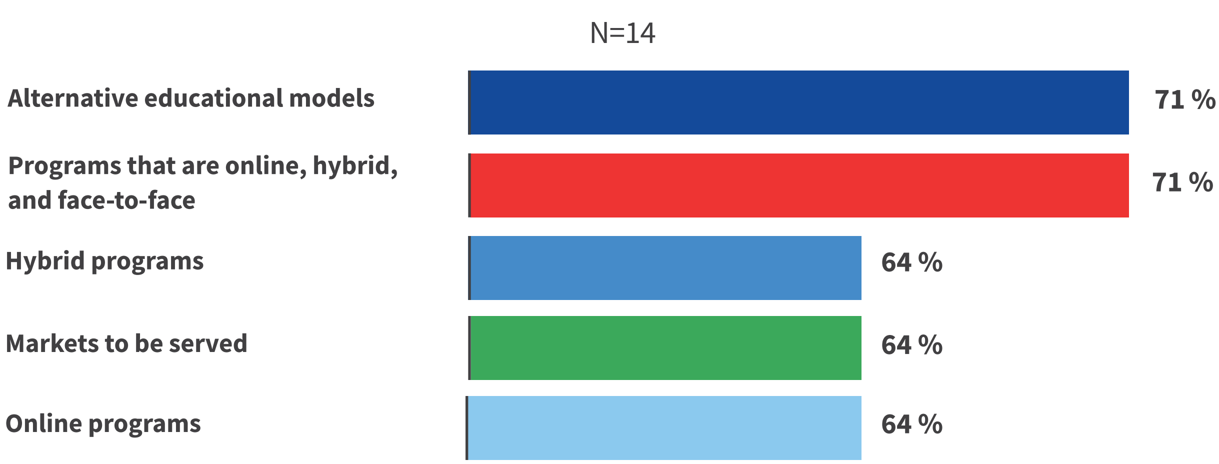


Joining virtual mobility initiatives and seeking new partnerships, part of Argentina's Top 5 for internationalization, are not in the Global Top 5. On the other hand, limiting study trips and strengthening internationalization at home are topics included in the Global Top 5 which are not in the Argentinian Top 5.

Looking Forward

Potential Transformation in 3 or More Years

The majority of Argentinian leaders (71%) declared that, in the near future, their institutions would implement alternative educational models or (71%) models that would go from online to hybrid or face to face (which, with 71%, was also the top choice globally). In addition, 64% said that they intended to consider hybrid programs, online programs, and the topic of markets to be served. According to survey results, all of these ideas were similar to those expressed by most university leaders globally.

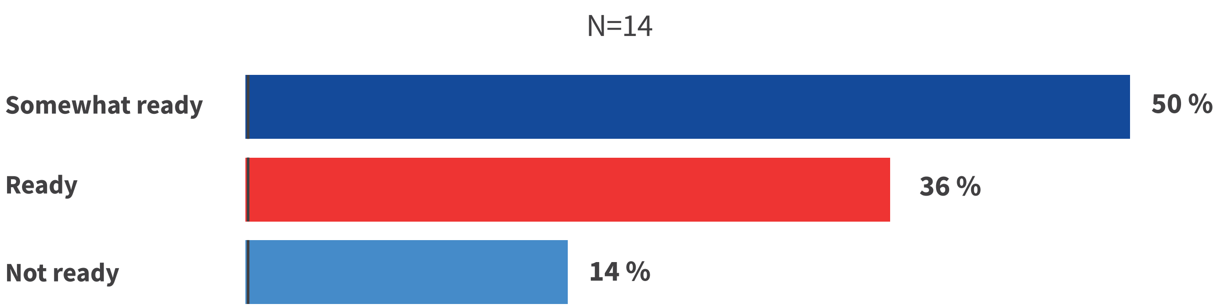


Brazil

Initial Institutional Reaction

Readiness to Shift to Remote Education

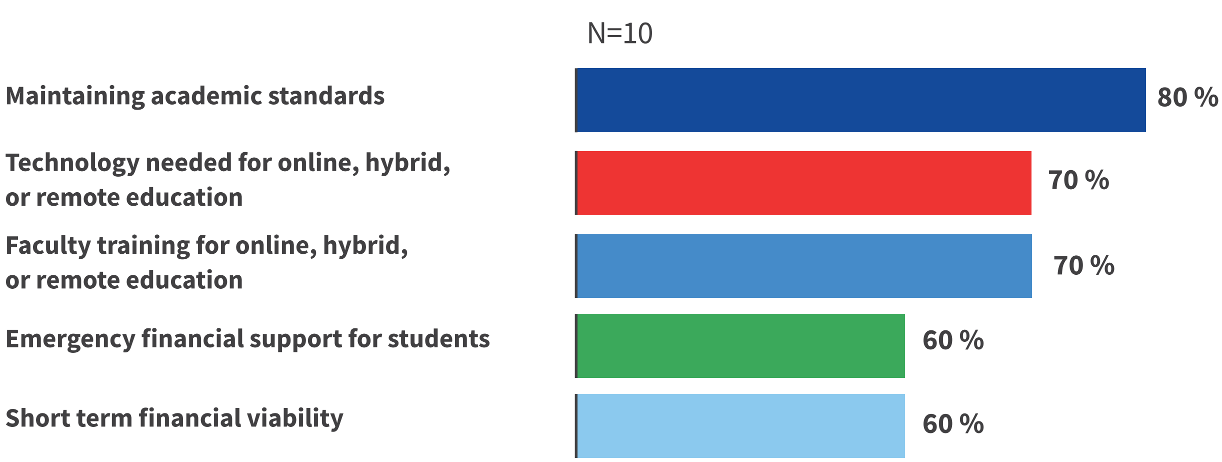
The majority of Brazilian university leaders (50%) declared that they were ready, 36% said they were somewhat ready, and 14% felt that they were not ready.



Brazil's result on readiness (50%) is higher than the one observed in the global perspective where 37% of respondents said they were ready, just over half of them (54%) declared that they were moderately prepared (compared to 37% in Brazil), and only 8% acknowledged that they were not ready (compared to 14% in Brazil).

Challenges as a Result of COVID-19

The top challenges reported in Brazil were maintaining academic standards, required technology, faculty training, financial support for students, and short-term financial viability.



Four of Brazil's main topics are included in the Global Top 5. However, short-term financial viability, fifth in Brazil, is not part of in the Global Top 5. In turn, mental health support for students, number 5 (40%) in the global perspective, is not included in Brazil's Top 5.

Preparing for 2020-2021

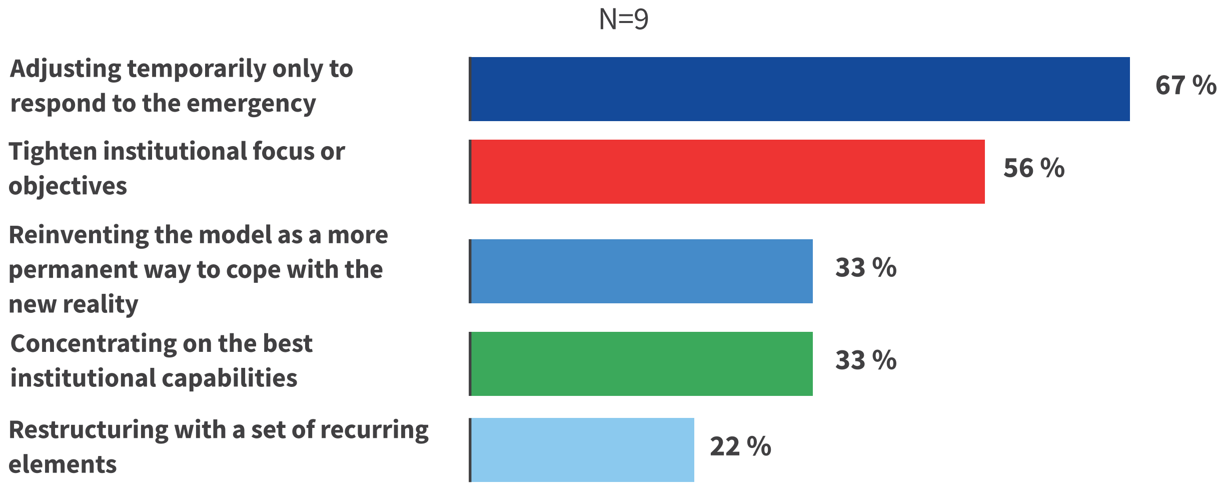
Anticipated Areas of Decrease, Increase or No Change

Institutional revenue (89%), student enrollment (78%), and research (67%) were the Top 3 areas where Brazilian university leaders anticipated slight to substantial decreases. The Top 3 for increases were investment in infrastructure (33%), continuing education (33%), and financial support for students (22%).

Globally, the topic of projects with business and industry (56%) is number 3 on the list for decreases, but in Brazil, this topic is in the Top 5 for increases. On the other hand, in the global perspective, research (with 47%) is included in the Top 3 of things expected to remain without change but in Brazil, with 67%, research is part of the Top 3 for expected decreases.

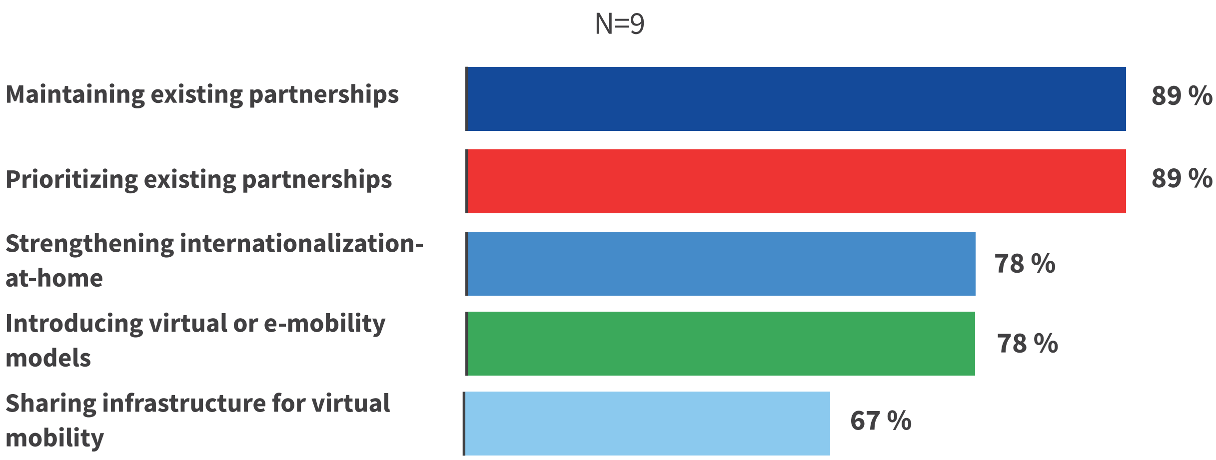
Impact on Financial Model

Brazilian leaders declared that adjusting temporarily to respond to the emergency was their primary concern (67% frequency), followed by tightening institutional objectives (56%), reinventing the model (33%), concentrating on best institutional capabilities (33%), and restructuring the model (22%). Adjusting temporarily was also the most frequent choice globally (47%), suggesting actions perhaps intended for a short-term impact rather than a long-term effect.



Internationalization

Brazil's Top 5 choices refer to the importance of virtual mobility and partnerships. Number one was maintaining partnerships and prioritizing existing partnerships, followed by strengthening internationalization at home, introducing virtual or e-mobility models, and sharing infrastructure for virtual mobility.

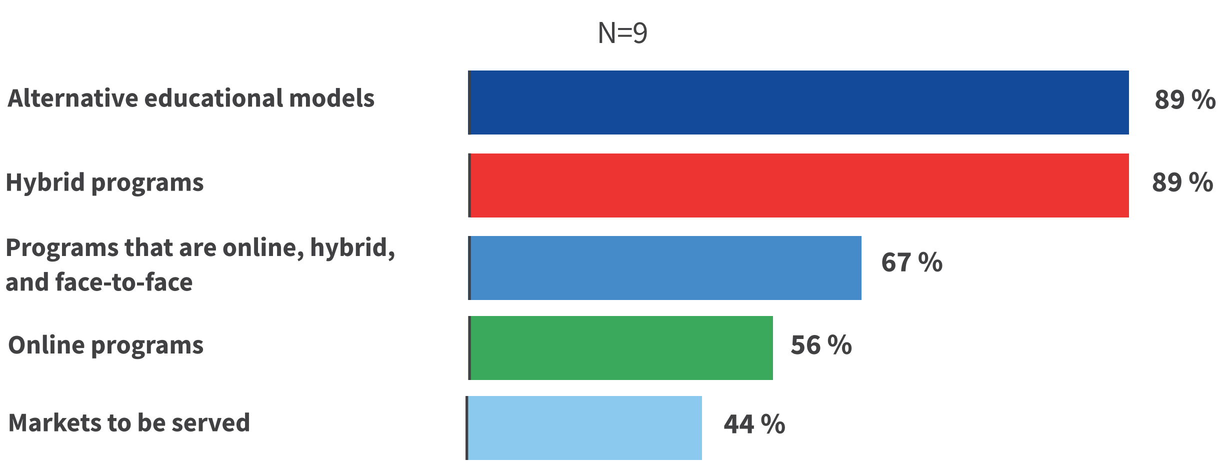


Suspending or limiting study trips, fifth globally (47%), is not included in Brazil's Top 5 for internationalization. Sharing infrastructure, fifth in Brazil, is not part of the global Top 5.

Looking Forward

Potential Transformation in 3 or More Years

A great number of Brazilian leaders (89%) declared that, in the near future, their institutions would be, mostly, implementing alternative educational models or hybrid programs, followed by flexible programs that can be online, hybrid or face to face (67%), online programs (56%), and markets to be served (44%). A model likely to switch from online to hybrid or face to face was the top choice for most (71%) university leaders in the global perspective.

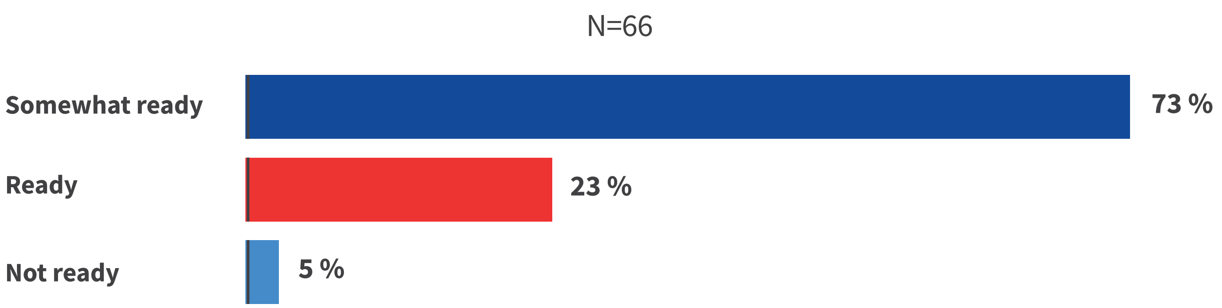


United Kingdom

Initial Institutional Reaction

Readiness to Shift to Remote Education

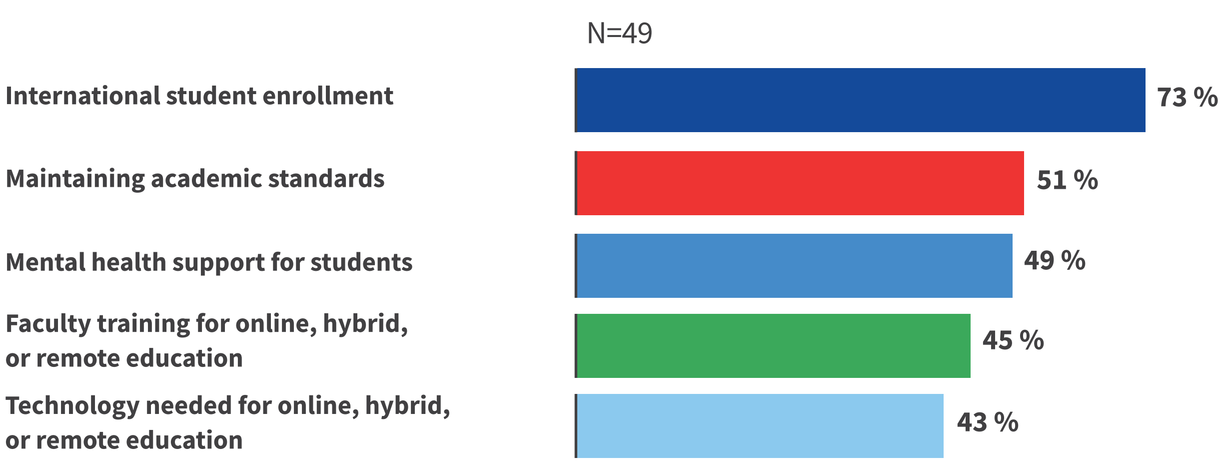
While 23% reported being ready, the vast majority of UK respondents (73%) declared that they were somewhat ready. A rather small amount (5%) felt that they were not ready.



UK's result on readiness (23%) is lower than the one observed in the global perspective where 37% of respondents said they were ready, where just over half of them (54%) declared that they were moderately prepared, and 8% acknowledged that they were not ready.

Challenges as a Result of COVID-19

The main challenges in the UK include international student enrolment, maintaining academic standards, mental health support for students, faculty training, and required technology.



Challenges reported in the UK correspond to those declared by university leaders globally, with the following difference: financial support for students (45%), fourth globally is not in UK's Top 5, while mental health support for student, third in the UK, is not in the global Top 5.

Preparing for 2020-2021

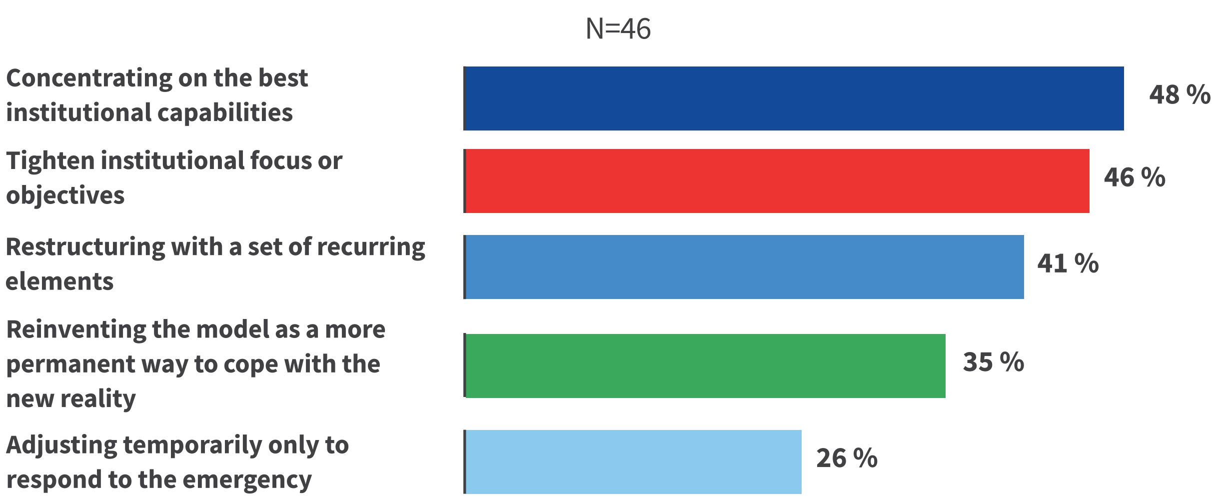
Anticipated Areas of Decrease, Increase or No Change

Institutional revenue (96%), student enrolment (89%), and investment in infrastructure (85%), are the Top 3 areas where UK leaders anticipated slight to substantial decreases. The Top 3 for increases were programmes for student employability (57%), financial support for students (46%), and programmes supporting entrepreneurship (46%).

With respect to the global results there are differences. For instance, the Top 3 areas of anticipated decreases, in the global perspective, were institutional revenue (73%), student enrolment (59%), and projects with business and industry (56%). Regarding areas expected to increase, financial support for students (45%), investment in infrastructure (30%), and continuing education (28%) were the Top 3 options globally.

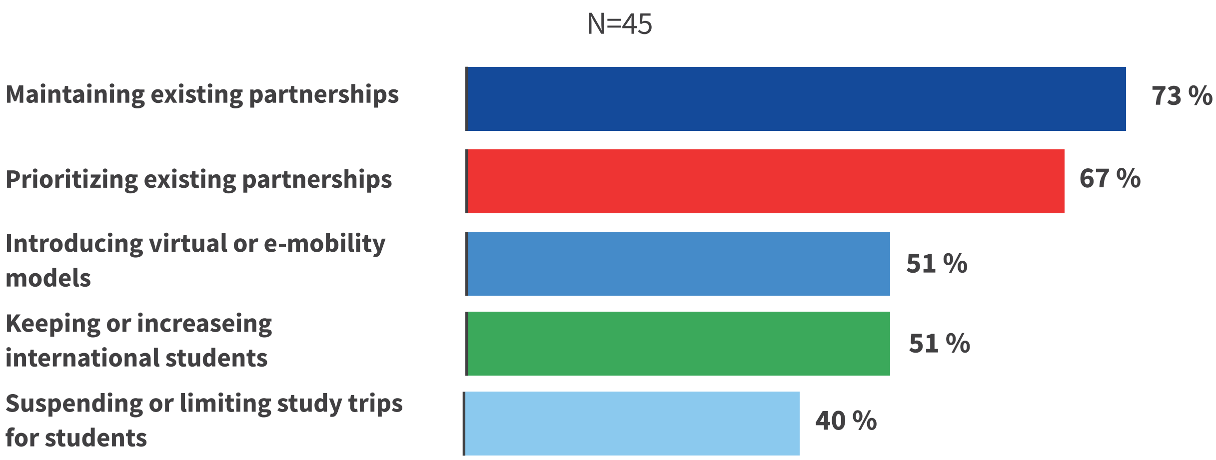
Impact on Financial Model

UK university leaders declared that concentrating on best institutional capabilities (48%) was their primary focus, followed by tightening institutional objectives (46%) and restructuring with a set of recurring elements (41%). Unlike in the global perspective, where the most frequent choice was "adjusting temporarily" (47%), UK choices suggested ideas which might have a rather longer term impact.



Internationalization

UK's Top 5 choices for internationalization refer to the importance of partnerships and, among others, e-mobility. Number 1 was maintaining partnerships, followed by prioritizing existing partnerships, keeping or increasing international students, virtual mobility initiatives, and suspending or limiting study trips.

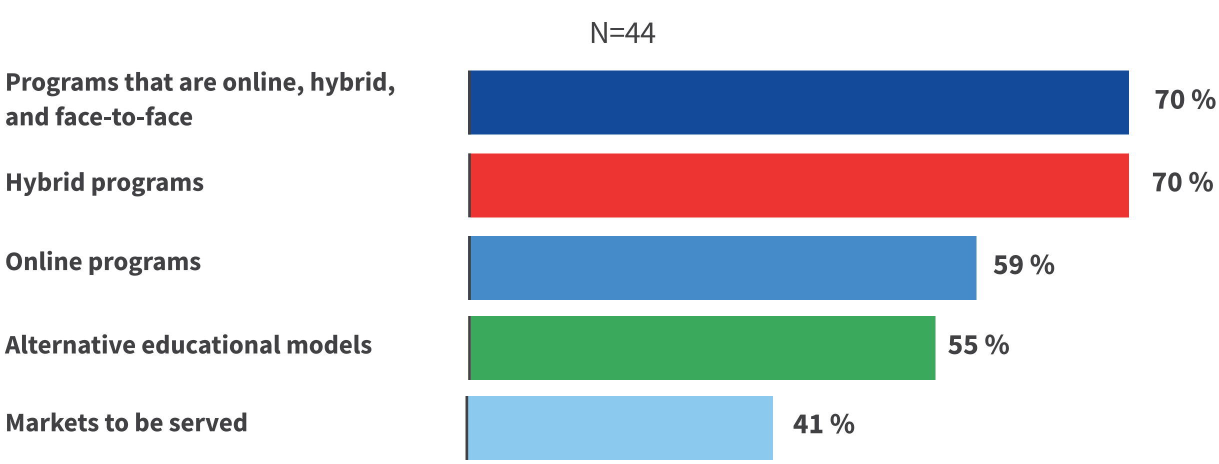


The topic of keeping or increasing international students (73%) was number 3 for the UK but it was not in the Top 5 globally. On the other hand, strengthening internationalization at home, number 4 (with 49%) in the global perspective, was not part of UK's Top 5.

Looking Forward

Potential Transformation in 3 or More Years

A great number of UK university leaders (70%) pictured a future in which their institutions would be, mostly, implementing a model that would involve online, hybrid, and face to face (this was also the top choice globally). Some UK leaders also mentioned hybrid program (70%), online program (59%), and alternative educational models (55%). In addition, survey results showed that a few of them (41%) would also consider reviewing the topic of markets to be served.

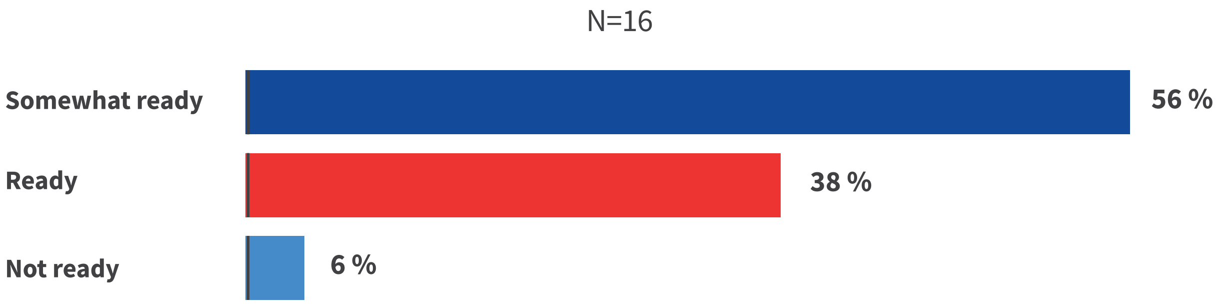


Spain

Initial Institutional Reaction

Readiness to Shift to Remote Education

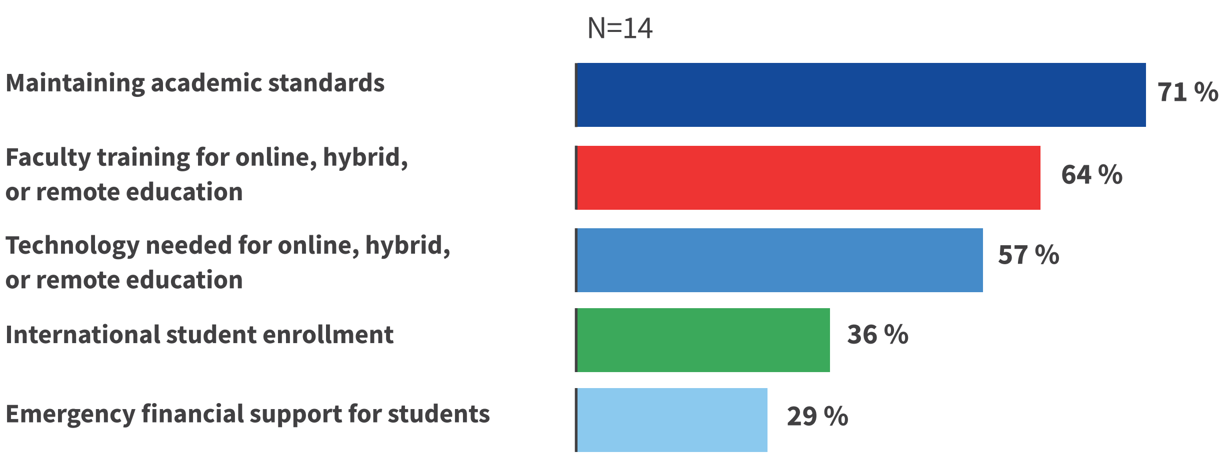
Spain was one of the few countries where most university leaders (56%) declared they were ready, 38% reported being somewhat ready and only 6% said that they were not ready.



Global results indicate that 37% of worldwide respondents were ready. Therefore, Spain's results on readiness were higher (56%).

Challenges as a Result of COVID-19

The main challenges referred by Spanish leaders were maintaining academic standards, faculty training, required technology, international student enrollment, and financial support for students.



Globally, the Top 5 results are similar to those declared by Spanish university leaders. A couple of differences are that maintaining academic standards (53%), third globally, is first in Spain, and international student enrolment, fourth in Spain, is not part of the Top 5 globally.

Preparing for 2020-2021

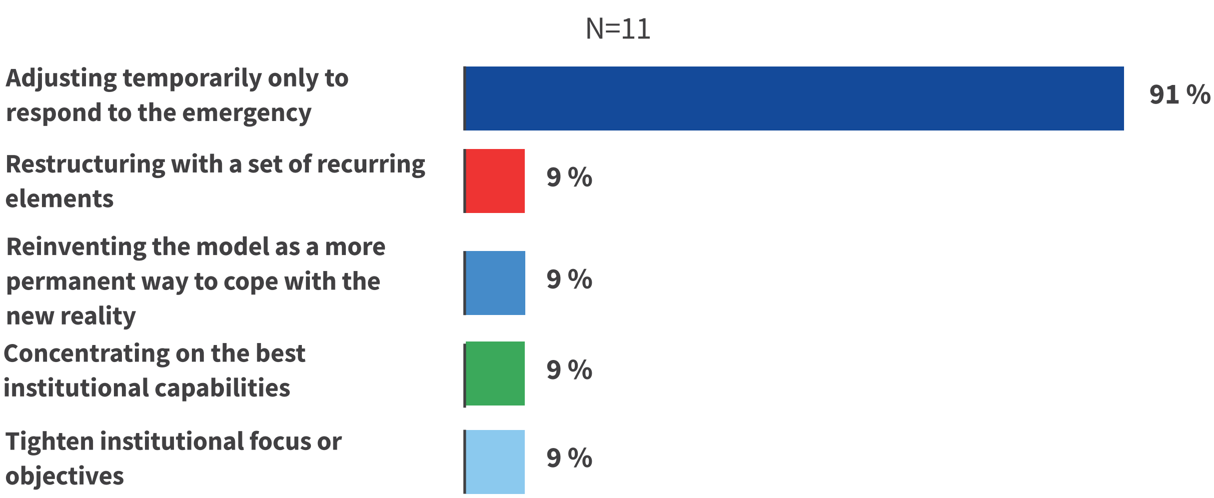
Anticipated Areas of Decrease, Increase or No Change

The Top 3 areas where Spain anticipated decreases were projects with business and industry (73%), institutional revenue (64%), and fundraising (55%). Financial support for students, (36%) investment in infrastructure (36%), or programs supporting entrepreneurship (46%) were the identified Top 3 for increases. Research (55%), financial support for students (55%), and student enrollment (45%), are the Top 3 expected to remain without change.

Noticeably, 45% of Spanish leaders declared that they expect no changes regarding student enrollment when, in the global perspective (59%), this topic is part of the Top 3 for things expected to decrease. Also, in the global perspective, programs supporting entrepreneurship is in the group of things expected not to change, whereas for Spain, it is in the Top 3 of things expected to increase.

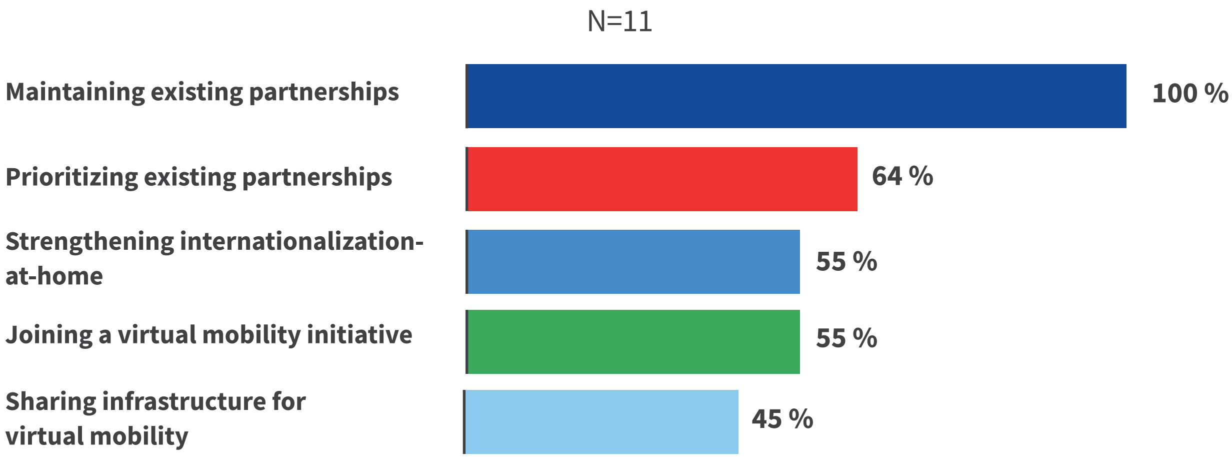
Impact on Financial Model

In Spain, nearly every university leader (91%) declared that adjusting temporarily only to respond to the emergency was their primary focus. Other choices, such as restructuring or reinventing the model, ended with barely a 9% frequency. Adjusting temporarily was also the Top choice globally (short-term impact actions). However, in Spain, this topic's frequency (91%) is much higher than the one observed globally (47%).



Internationalization

The top 5 choices in Spain for internationalization acknowledge the importance of partnerships, and alternative options to physical mobility. Maintaining partnerships was number 1, followed by prioritizing existing partnerships, strengthening internationalization at home, joining a virtual mobility initiative, and sharing infrastructure for virtual mobility.

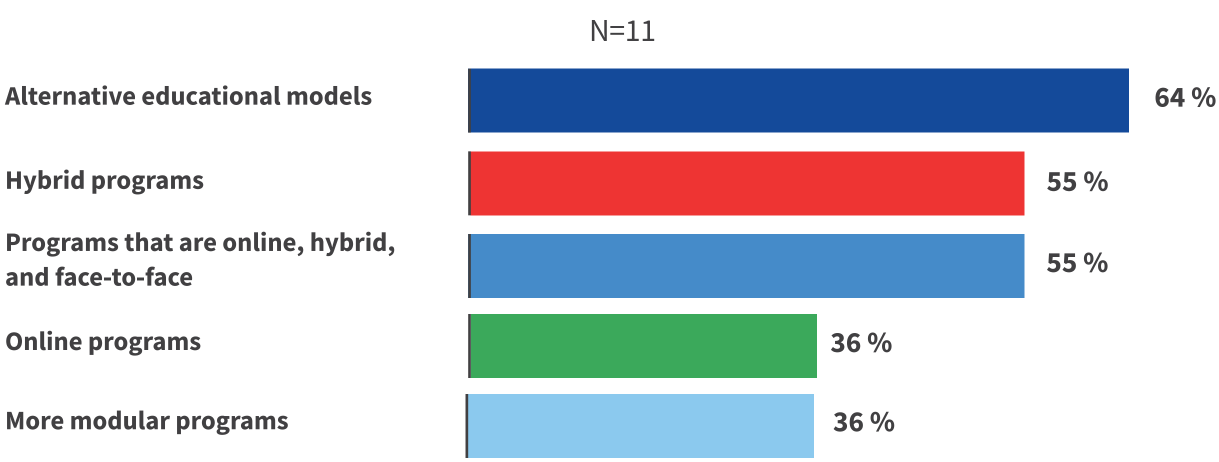


Joining virtual mobility initiatives and sharing infrastructure, fourth and fifth in Spain, are not in the global Top 5. Similarly, virtual mobility models (63%) and suspending or limiting study trips (47%), second and fifth globally, are not included in Spain's Top choices.

Looking Forward

Potential Transformation in 3 or More Years

A high number of Spanish leaders (64%) mentioned that in the future their institutions would mostly offer alternative educational models (64%), hybrid programmes (55%), and programs involving online, hybrid, face to face (55%). A few others also mentioned online programs (36%) and the possibility of more modular programs (36%).



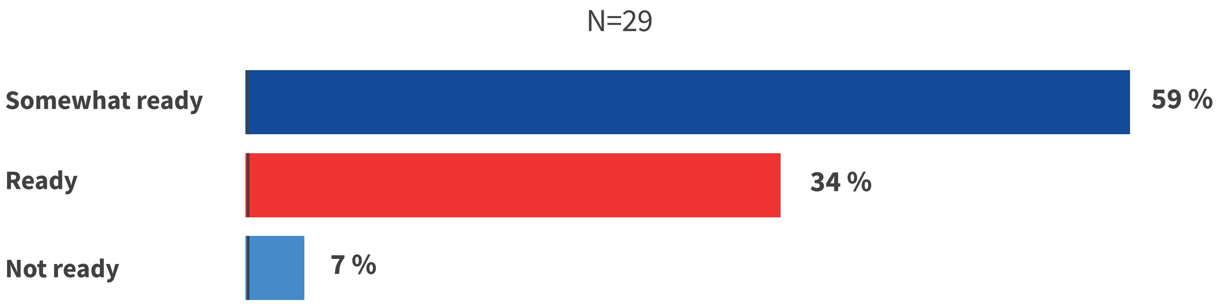
Whereas alternative educational models (64%) was the top choice for Spain, programs that are online, hybrid, and face to face was the most frequent response (71%) globally.

India

Initial Institutional Reaction

Readiness to Shift to Remote Education

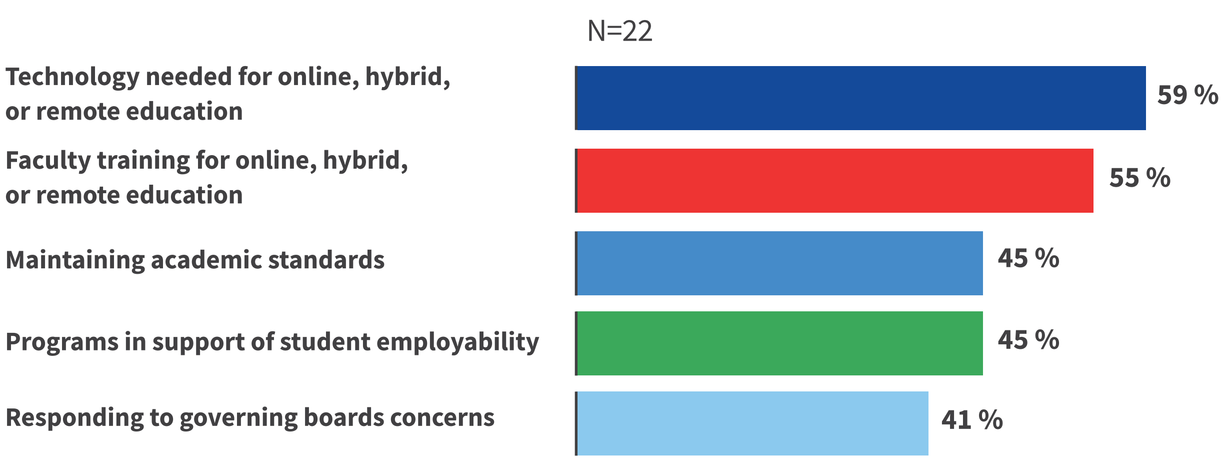
In India, while 34% said that they were somewhat ready, the vast majority of respondents (59%) declared that they were ready. A rather small amount (7%) felt that they were not ready.



Globally, 37% of worldwide respondents declared they were ready. Therefore, India's result on readiness (59%) was higher.

Challenges as a Result of COVID-19

In India, the top challenges reported by the respondents were: required technology, faculty training, maintaining academic standards, programs in support of student employability, and responding to governing board concerns.



Programs in support of student employability and responding to government board concerns, fourth and fifth in India, are not part of the Global Top 5. In turn, emergency financial support for students (45%) and mental health support for students (40%), fourth and fifth in the global perspective, are not included in India's Top 5.

Preparing for 2020-2021

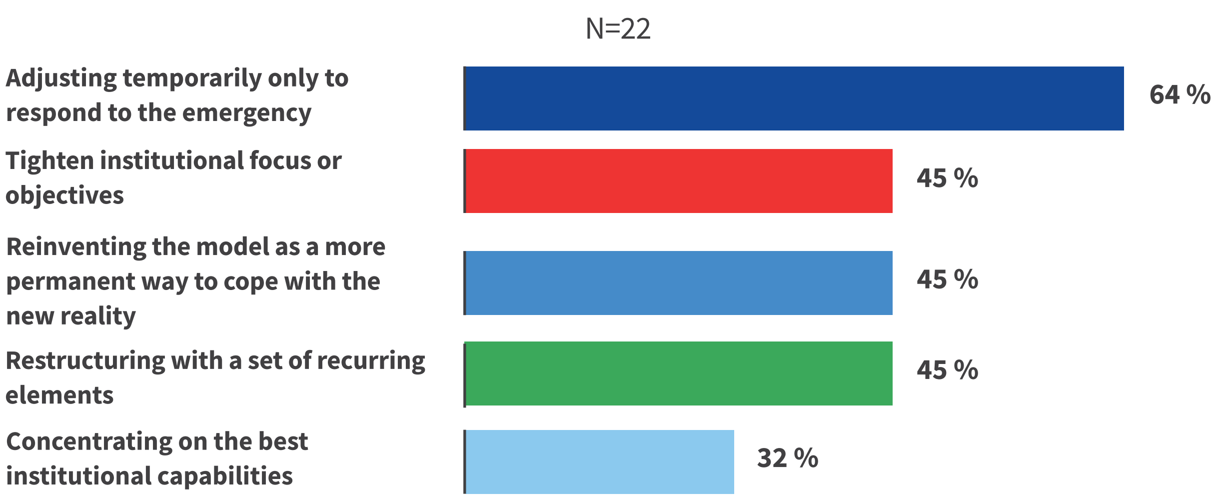
Anticipated Areas of Decrease, Increase or No Change

Institutional revenue (86%), projects with business or industry (73%), and fundraising (59%) were the Top 3 areas where India leaders anticipated slight to substantial decreases. The Top 3 for increases were programs supporting entrepreneurship (41%), investment in infrastructure (41%), and programs supporting student employability (27%).

There are a few differences with the global perspective. For example, regarding decreases, student enrollment (59%), is the only top 3 globally that is not part of India's top 3. In areas expected to increase, financial support for students (45%) and continuing education (28%) are included in the global perspective but they are not in India's top choices.

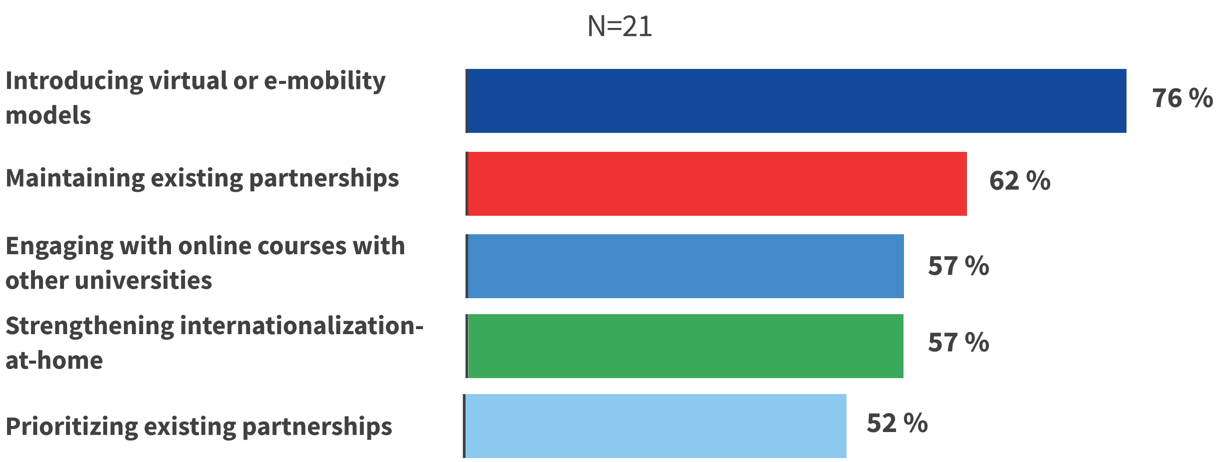
Impact on Financial Model

Indian leaders declared that adjusting temporarily only to respond to the emergency was their primary concern (64% frequency), followed by tightening institutional objectives, reinventing, and restructuring the model (45% frequency in each case). Adjusting temporarily was also the most frequent choice globally (47%), but it was not as frequent as in India (64%). This suggests that actions in India are more focused on short-term impact and not a long-term effect.



Internationalization

India's Top 5 choices refer to the importance of virtual mobility and partnerships. Number 1 was introducing virtual or e-mobility models, followed by maintaining partnerships, engaging in online courses with other universities, strengthening internationalization at home, and prioritizing existing partnerships.

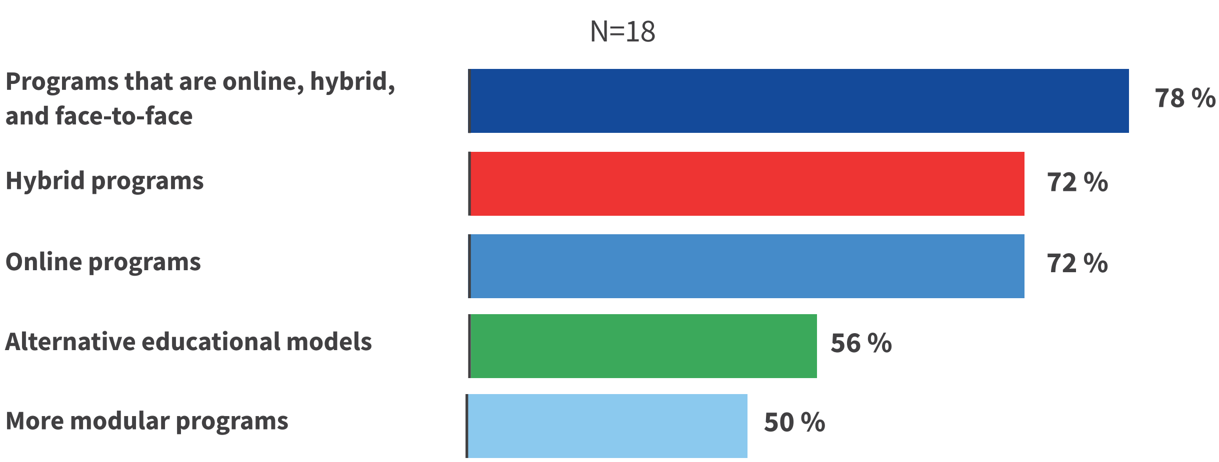


Suspending or limiting study trips, fifth globally (with 47%), is not included in India's Top 5 for internationalization. Engaging in online courses, third in India, is not in the global Top 5.

Looking Forward

Potential Transformation in 3 or More Years

A great number of respondents (78%) declared that, in the near future their institutions would be mostly implementing a model that involves online, hybrid and face to face (with 71%, this also was the top choice globally), along with hybrid programs, and online programs (72% each), followed by alternative educational models (56%) and considering more modular programs (50%).

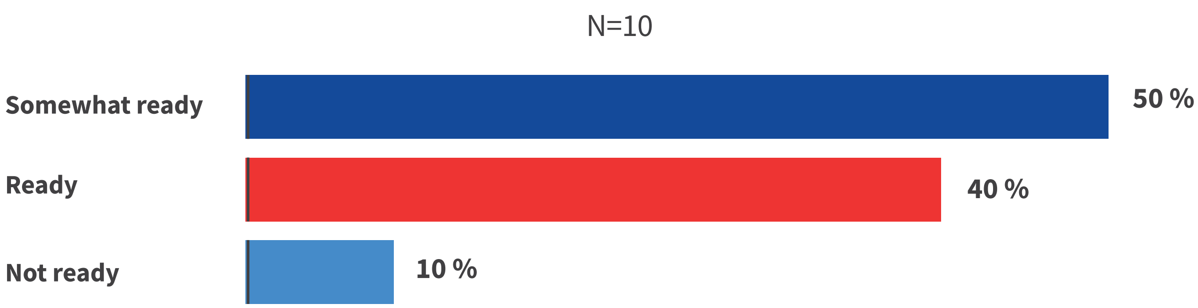


Japan

Initial Institutional Reaction

Readiness to Shift to Remote Education

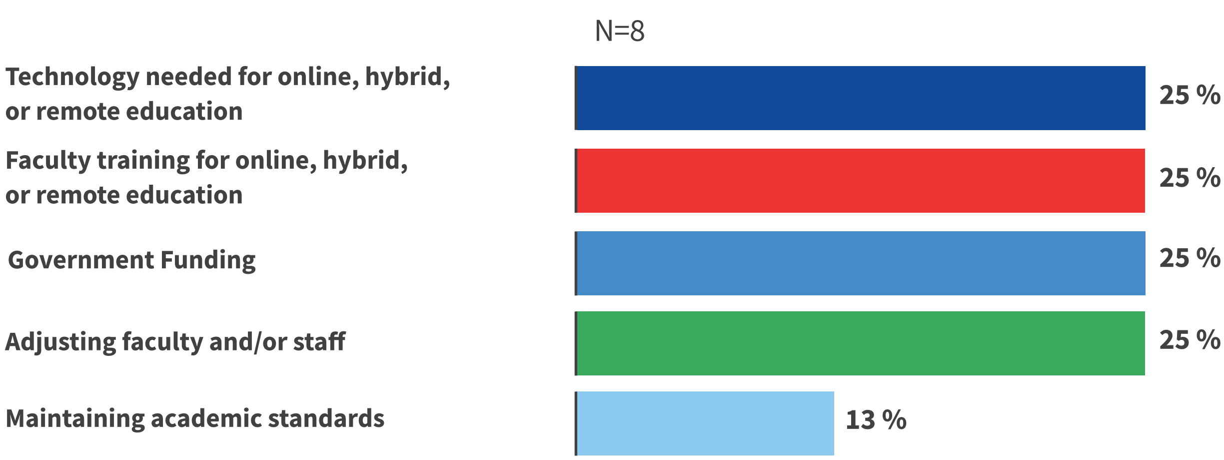
Japanese respondents indicated that they were ready (40%) while a higher percent said that they were somewhat ready (50%). A smaller amount (10%) felt that they were not ready.



Japan's result on readiness (40%) is slightly higher than the one observed in the global perspective where 37% of respondents said they were ready, just over half of them (54%) declared that they were moderately prepared, and 8% acknowledged that they were not ready.

Challenges as a Result of COVID-19

The top challenges reported by Japanese leaders were required technology, faculty training, government funding, adjusting faculty and/or staff, and maintaining academic standards.



Government funding and adjusting faculty and / or staff, third and fourth in Japan, are not part of the Global Top 5. In turn, emergency financial support (45%) and mental health support for students (40%), fourth and fifth in the global perspective, are not included in Japan's Top 5.

Preparing for 2020-2021

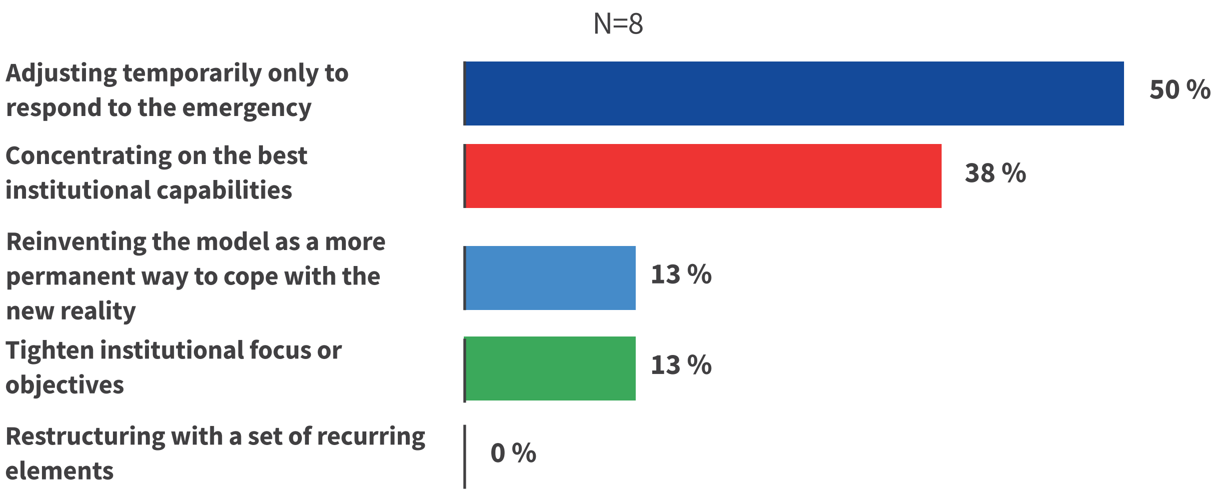
Anticipated Areas of Decrease, Increase or No Change

In Japan, student enrollment, institutional revenue, and investment in infrastructure (63% in each case), were the Top 3 areas of anticipated decreases. The Top 3 for increases were programs supporting student employability, programs supporting entrepreneurship, and fundraising (13% in each case).

Global and Japanese perspectives show a few differences. For example, regarding decreases, fundraising (49%) is part of the global Top 5 whereas, in Japan, with 13%, this topic is number 3 for increases. Similarly, continuing education, number 3 globally (28%) in areas expected to increase, is not part of Japan's Top 5.

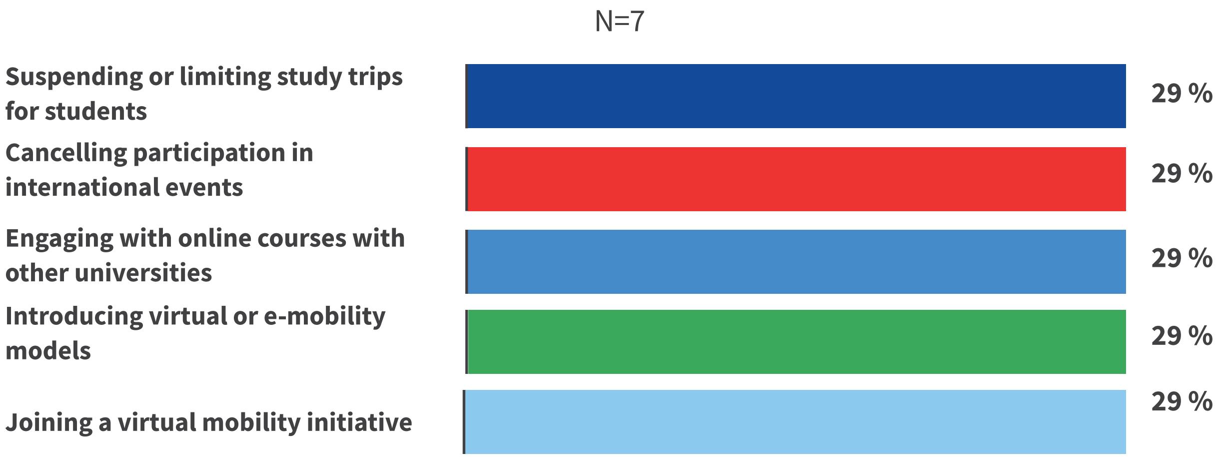
Impact on Financial Model

Adjusting temporarily to respond to the emergency was the primary goal (50%) in Japan, followed by concentrating on best institutional capabilities (38%), reinventing the model (13%), and tightening institutional objectives (13%). Just like in Japan, adjusting the model was the most frequent choice globally (47%), suggesting actions perhaps intended to have a rather short-term effect. Accordingly, the topic of restructuring with recurrent elements for the years to come, was not considered as an option by Japanese university leaders.



Internationalization

Japan's Top 5 choices refer to the importance of taking preventive measures during the crisis as well as to the importance of virtual mobility. Number 1 was suspending study trips, followed by cancelling participation in international events, engaging in online courses with other universities, introducing virtual mobility models, and joining virtual mobility initiatives.

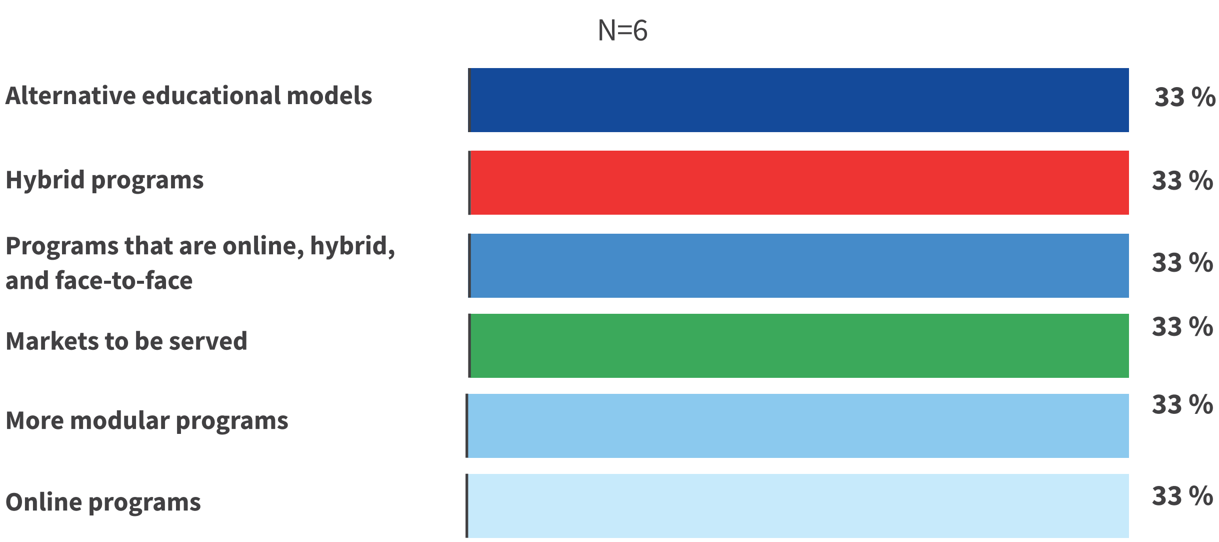


Numbers 2, 3 and 5 in Japan's Top 5 are not in the global Top 5. In turn, maintaining partnerships, prioritizing partnerships, and strengthening internationalization at home, all of which are in the global Top 5, did not appear in Japan's internationalization top choices.

Looking Forward

Potential Transformation in 3 or More Years

Japanese leaders did not refer to one specific predominant model in their universities for the years to come. Instead, they declared that, in the near future, their institutions would be equally likely to use alternative educational models, hybrid programs, online programs, or programs that are, online, hybrid and face to face. In addition, they also mentioned they would consider markets to be served and more modular programs.

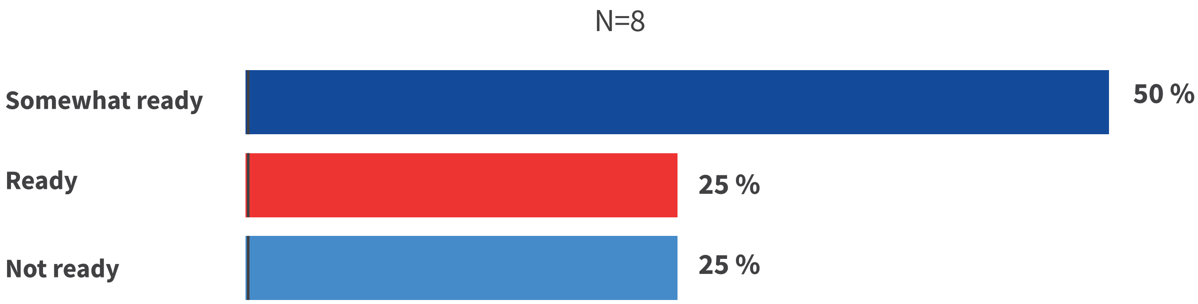


Canada

Initial Institutional Reaction

Readiness to Shift to Remote Education

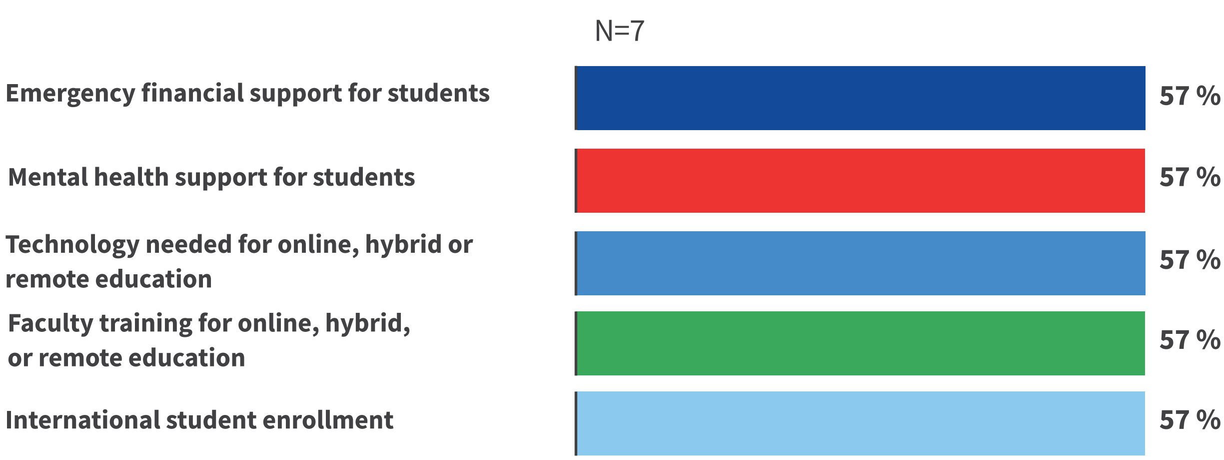
The majority of Canadian university leaders (50%) declared they were somewhat ready. On the other hand, 25% said they were ready and 25% felt that they were not ready.



Canada's result on readiness (25%) is lower than the one observed in the global perspective (37%), where, in addition, just over half of the respondents (54%) said they were moderately prepared, and 8% acknowledged that they were unprepared.

Challenges as a Result of COVID-19

The top challenges reported in Canada were financial support for students, mental health support for students, required technology, faculty training, and international student enrollment.



Four of Canada's main topics are included in the global Top 5. However, international student enrollment, regarded as very important in Canada, is not part of the global Top 5. In turn, maintaining academic standards, third (53%) globally, is not included in Canada's Top 5.

Preparing for 2020-2021

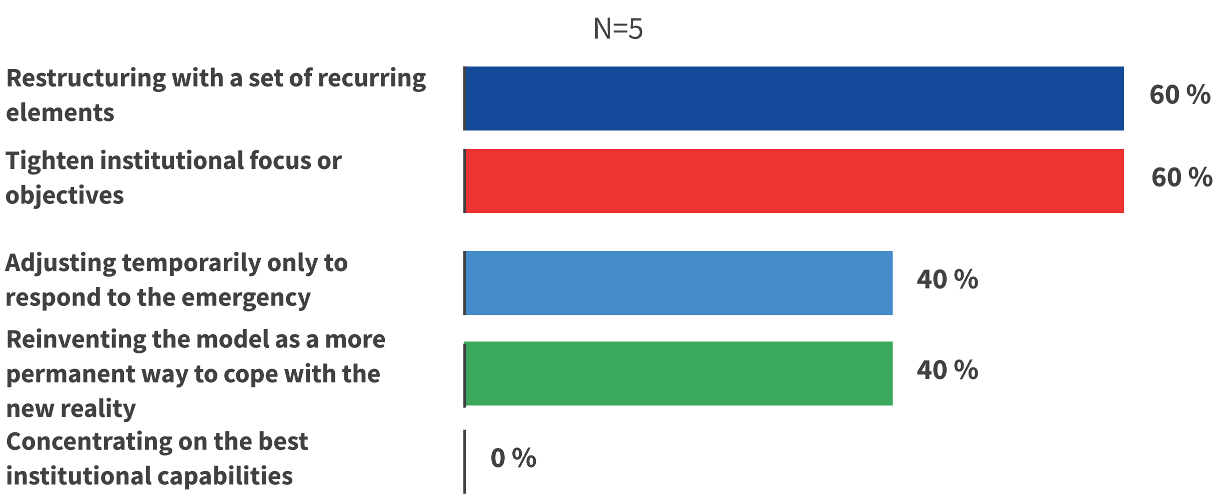
Anticipated Areas of Decrease, Increase or No Change

Institutional revenue (80%), continuing education (60%), and fundraising (60%) were the Top 3 areas where Canadian university leaders anticipated slight to substantial decreases. Their Top 3 for increases were investment in infrastructure (60%), student enrollment (60%), and financial support for students (60%). Additionally, programs supporting entrepreneurship (80%), research (80%), and programs supporting student employability (60%) were their Top 3 topics expected not to change.

Globally, the topic of continuing education (28%) is number three on the list for increases, but in Canada, this topic is in the Top 3 for decreases. Similarly, in the global perspective, student enrollment (59%) is included in the Top 3 for decreases, whereas in Canada, it is in the Top 3 for increases.

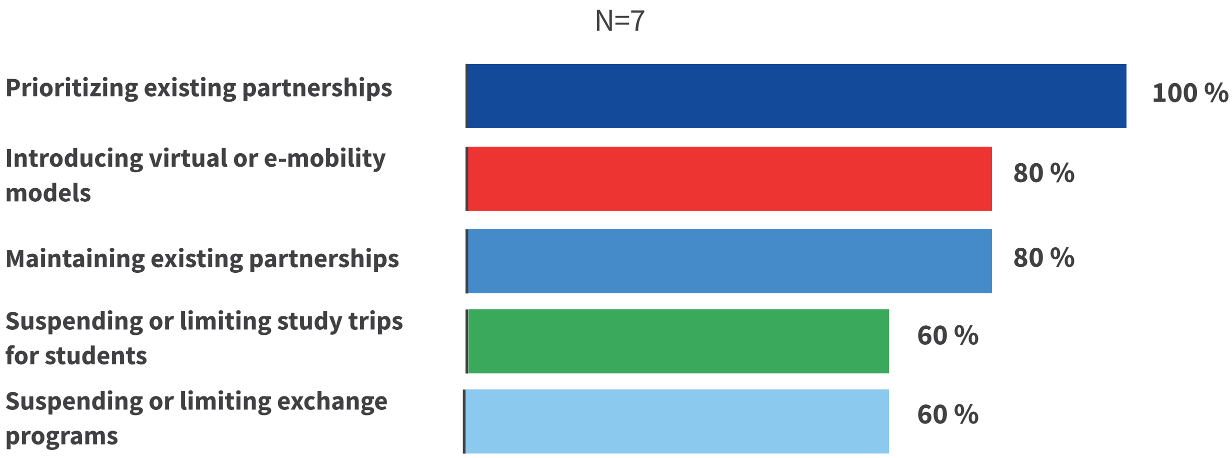
Impact on Financial Model

Canadian leaders declared that restructuring and tightening institutional objectives (60% frequency in each case) were their main concerns, followed by adjusting temporarily to respond to the emergency and re-inventing the model (40% frequency each). Adjusting temporarily was the most frequent choice globally (47%), suggesting actions probably intended for a short-term impact rather than a long-term effect.



Internationalization

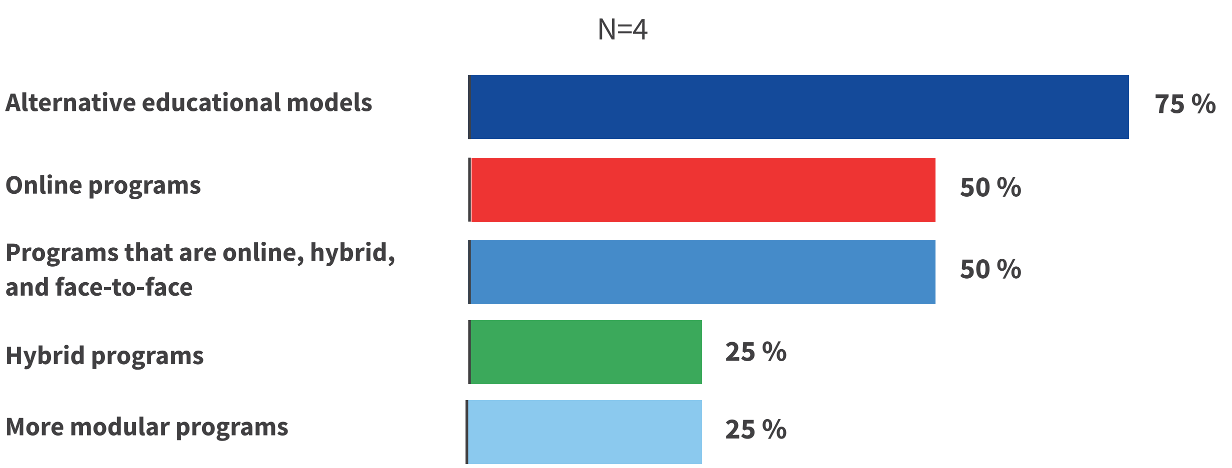
Canada's main choices refer to the importance of virtual mobility and partnerships. Number one was prioritizing existing partnerships followed by virtual or e-mobility models, maintaining partnerships, suspending study trips, and suspending exchange programs. Interestingly, strengthening internationalization at home, fourth globally (49%), is not in Canada's Top 5, and suspending exchange programs, fifth in Canada, is not part of the global Top 5.



Looking Forward

Potential Transformation in 3 or More Years

A majority of Canadian respondents (75%) declared that, in the near future, their institutions would be implementing alternative educational models, followed by flexible programs that can be online, hybrid or face to face (50%), online programs (50%), hybrid programs (25%), more modular programs (25%). In the global perspective, a model likely to switch from online to hybrid or face to face was the top choice for most (71%) university leaders.

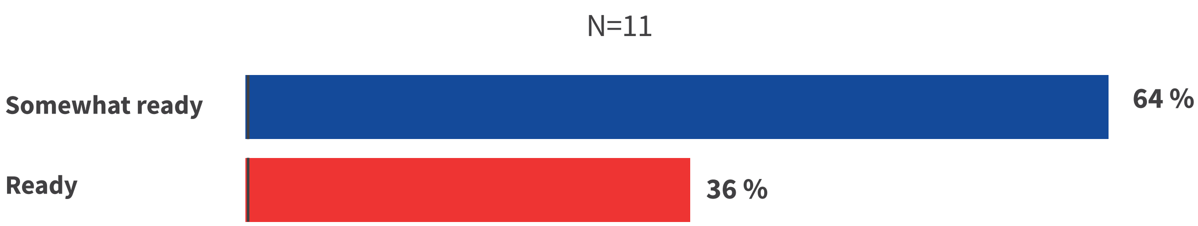


Chile

Initial Institutional Reaction

Readiness to Shift to Remote Education

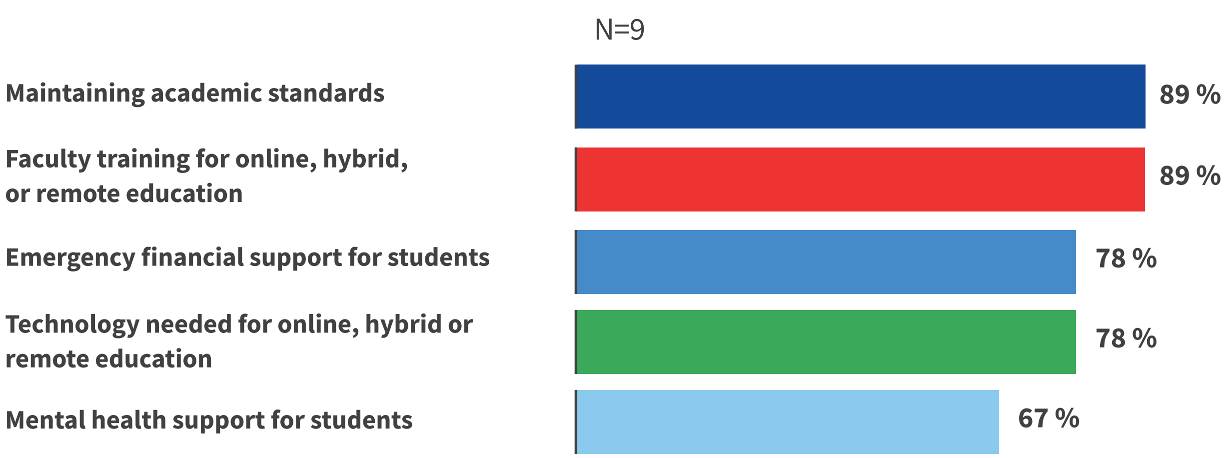
The majority of Chilean university leaders (64%) declared they were somewhat ready. On the other hand, 36% said they were ready, and no one declared being unprepared.



Chile's result on readiness (36%) is similar to the one observed in the global perspective (37%), where, in addition, just over half of the respondents (54%) said they were moderately prepared, and 8% acknowledged that they were not ready.

Challenges as a Result of COVID-19

The top challenges reported in Chile were maintaining academic standards, faculty training, financial support for students, required technology, and mental health support for students.



All of Chile's main topics are included in the global Top 5, only with some changes in order of importance and percentages.

Preparing for 2020-2021

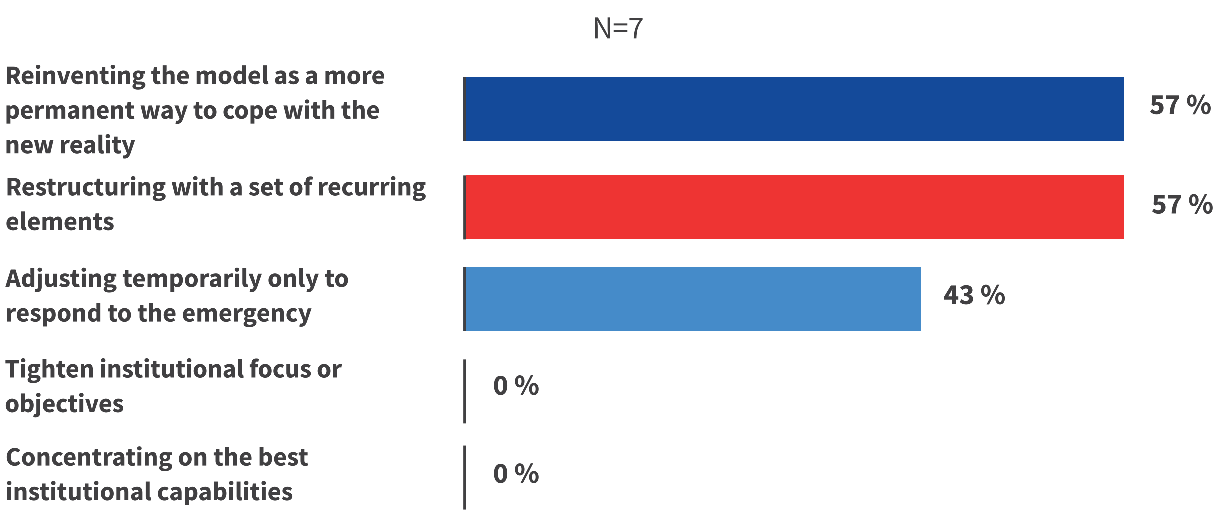
Anticipated Areas of Decrease, Increase or No Change

Investment in infrastructure (86%), institutional revenue (71%), and fundraising (71%), were the Top 3 areas where Chilean leaders anticipated slight to substantial decreases. Their Top 3 for increases were financial support for students (86%), continuing education (43%), and research (14%). In addition, programs supporting student employability (86%), programs supporting entrepreneurship (71%), and student enrollment (43%) were their Top 3 topics expected not to change.

Globally, the topic of investment in infrastructure (30%) is number two on the list for increases, but in Chile, this topic is first for decreases. Similarly, in the global perspective, student enrollment (59%) is included in the Top 3 for decreases, whereas in Chile, it is expected to remain without change.

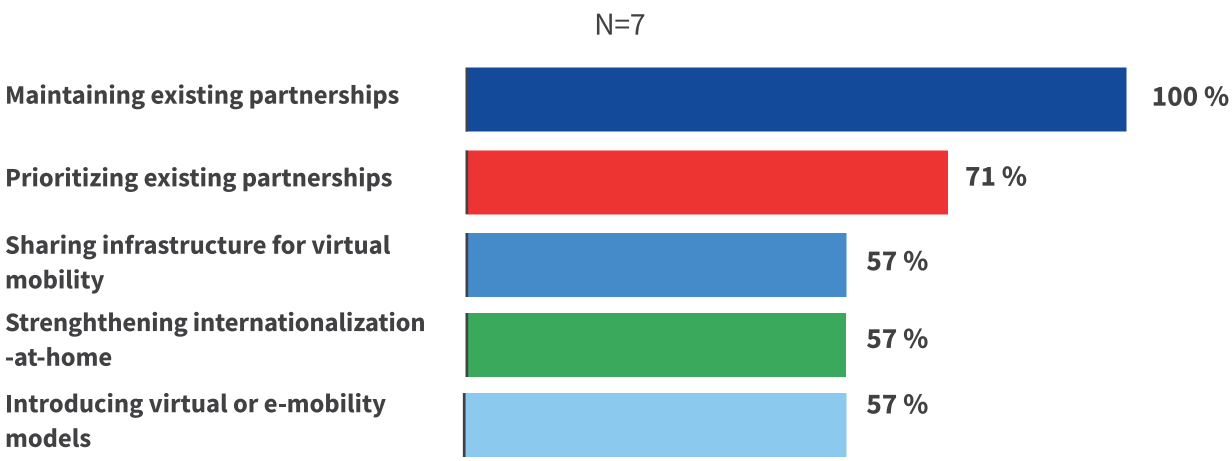
Impact on Financial Model

Chilean leaders declared that restructuring and reinventing the model (57% frequency each) were their main concerns, followed by adjusting temporarily to respond to the emergency (43% frequency). Adjusting temporarily was the most frequent choice globally (47%), suggesting actions probably intended for a short-term impact rather than a long-term effect.



Internationalization

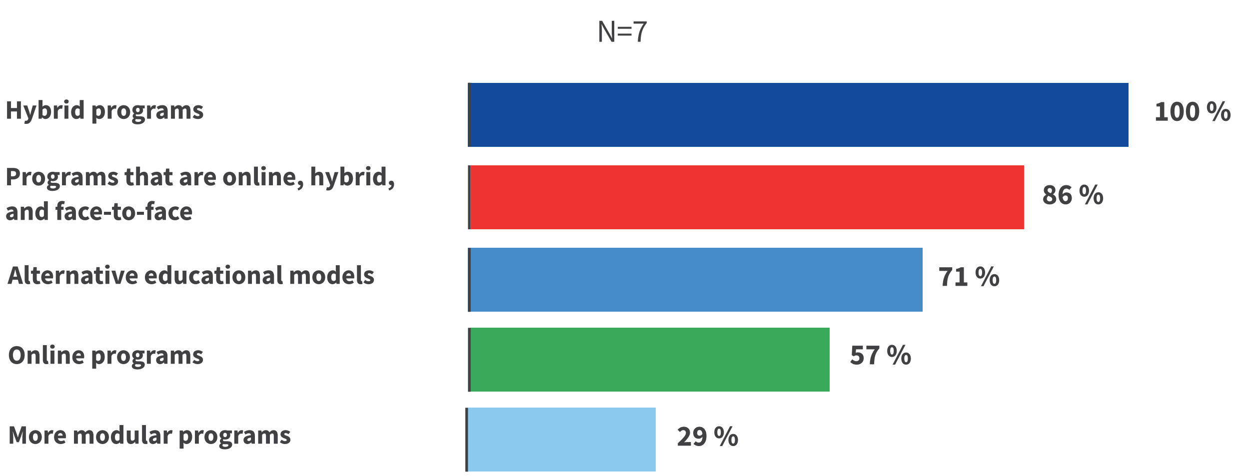
Chile's main choices refer to the importance of virtual mobility and partnerships. Number one was maintaining partnerships, followed by prioritizing existing partnerships, sharing infrastructure for virtual mobility, strengthening internationalization at home, and introducing virtual or e-mobility models. Interestingly, suspending study trips, fifth globally (47%), is not in Chile's Top 5, and sharing infrastructure for virtual mobility, fourth in Chile, is not part of the global Top 5.



Looking Forward

Potential Transformation in 3 or More Years

Every Chilean leader who answered this survey (100%) declared that, in the near future, their institutions would be implementing hybrid programs, followed by flexible programs that can be online, hybrid or face to face (86%), alternative educational models (71%), online programs (57%), and more modular programs (29%). In the global perspective, a model likely to switch from online to hybrid or face to face was the top choice for most (71%) university leaders.

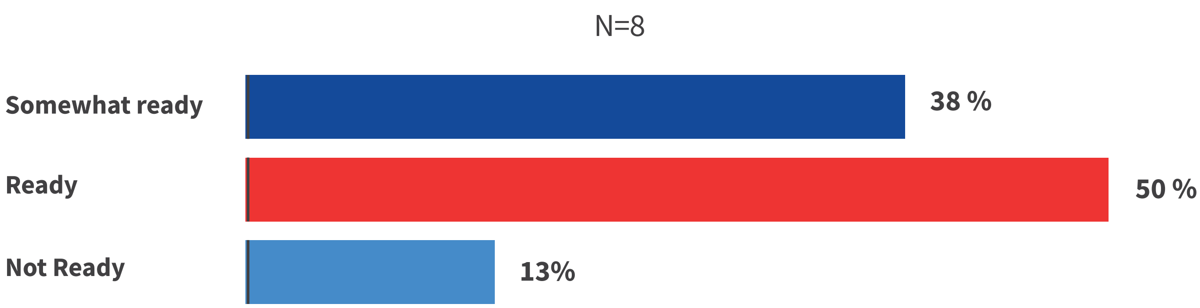


Colombia

Initial Institutional Reaction

Readiness to Shift to Remote Education

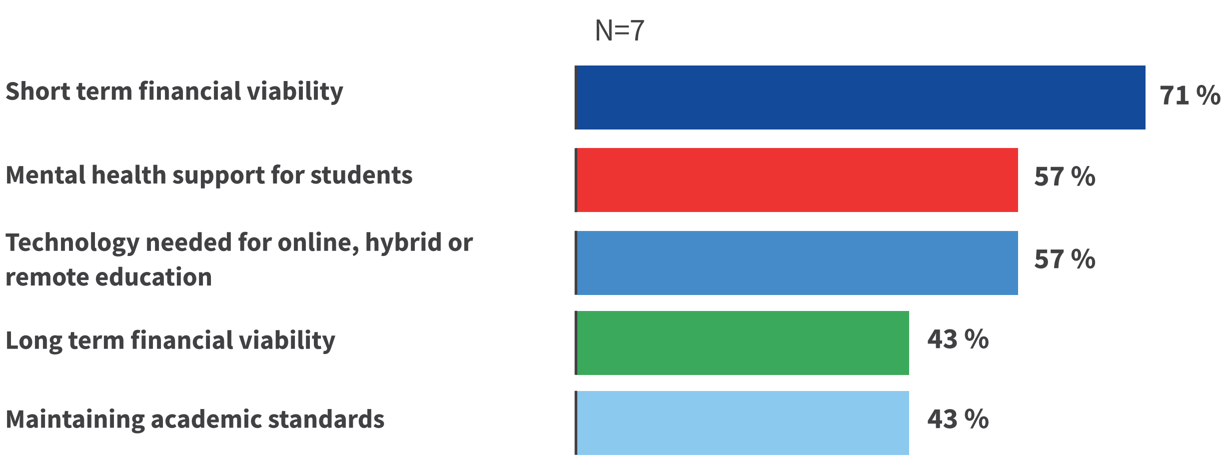
The majority of Colombian leaders (50%) said they were ready while 38% declared that they were only moderately prepared. On the other hand, 13% mentioned being unprepared.



Colombia's result on readiness (50%) is higher than the one observed globally (37%), where, in addition, just over half of the respondents (54%) said they were moderately prepared, and 8% acknowledged that they were unprepared.

Challenges as a Result of COVID-19

Colombia's top challenges were short term financial viability, mental health support for students, required technology, long term financial viability, and maintaining academic standards.



Three of Colombia's main topics are included in the global Top 5. However, short term financial viability and long term financial viability, numbers one and four in Colombia, are not part of the global Top 5. In turn, faculty training and emergency financial support for students, first (58%) and fourth (45%) in the global perspective, are not among Colombia's Top choices.

Preparing for 2020-2021

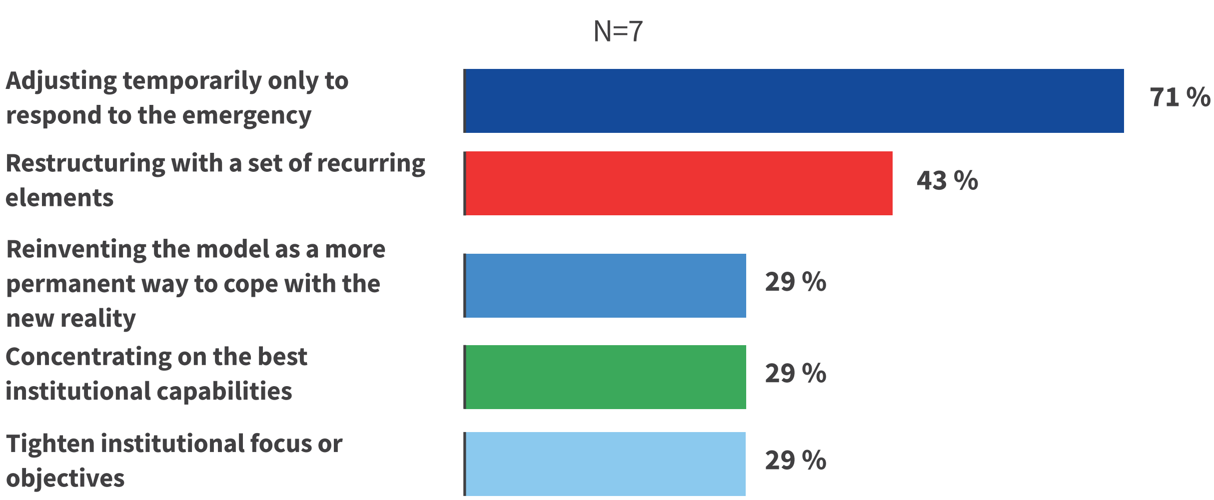
Anticipated Areas of Decrease, Increase or No Change

Institutional revenue (100%), student enrollment (86%), and programs with business and industry (71%) were the top topics where Colombian leaders anticipated decreases. In addition, investment in infrastructure, programs supporting student employability, and programs supporting student entrepreneurship (43% each) were among the areas where they expected no changes. On the other hand, financial support for students (71%), fundraising (43%), and research (29%) were among the top topics expected to increase.

One important difference with the global perspective is that the topic of fundraising, number three (65%) for decreases globally, is second for increases in Colombia. Similarly, research, first (38%) in the global perspective for no change, is also one of Colombia's top areas expected to increase.

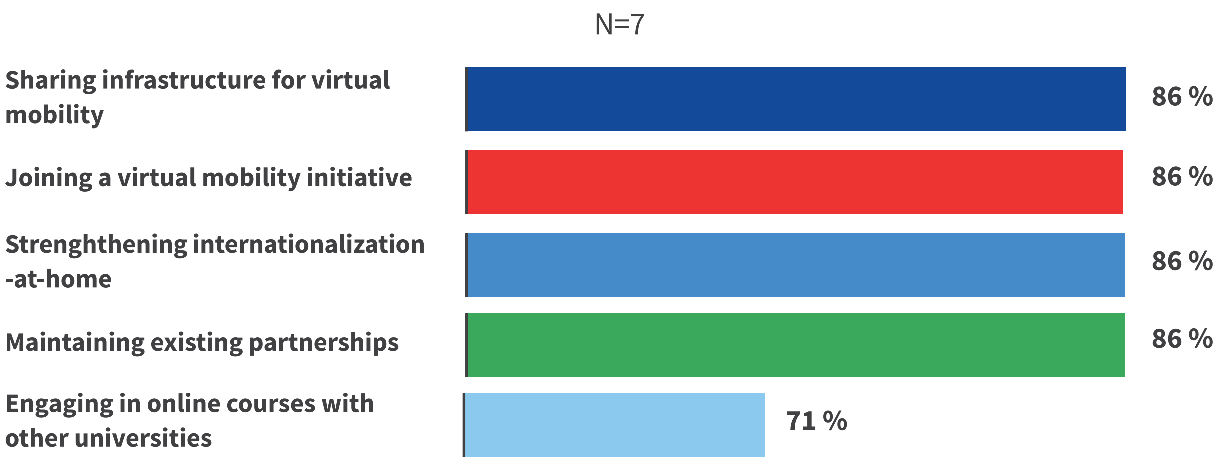
Impact on Financial Model

Adjusting temporarily only to respond to the emergency (71% frequency) was Colombia's main concern, followed by restructuring (43% frequency), tightening institutional objectives, concentrating on best institutional capabilities, and reinventing the model (29% frequency each). Temporary adjustments only to respond to the emergency was also the most frequent choice globally (47%), suggesting actions probably intended for a short-term impact rather than a long-term effect.



Internationalization

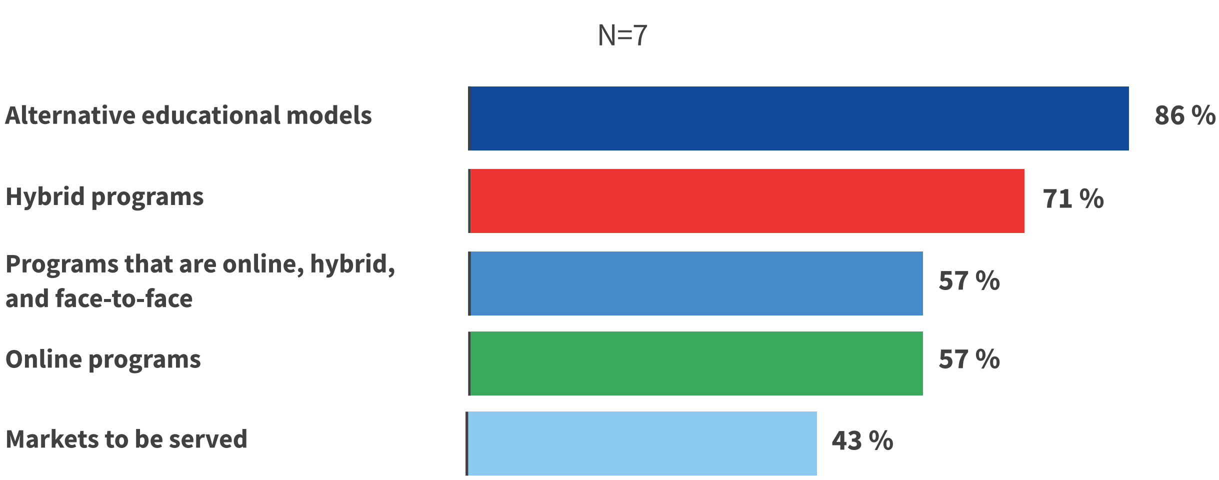
Colombia's choices refer to the importance of virtual mobility and partnerships. Their top topics were sharing infrastructure for virtual mobility, joining a virtual mobility initiative, strengthening internationalization at home, and maintaining partnerships (86% each), along with engaging in online courses with other universities (71%). Introducing virtual mobility models (63%), prioritizing partnerships (56%) and suspending study trips (47%), second, third, and fifth globally, are not included in Colombia's Top 5. Similarly, sharing infrastructure for virtual mobility, joining a virtual mobility initiative, and engaging in online courses with other universities, included in Colombia's top choices, are not part of the global Top 5.



Looking Forward

Potential Transformation in 3 or More Years

A greater number of Colombian leaders (86%) declared that, in the near future, their institutions would be implementing alternative educational models, followed by hybrid programs (71%), flexible programs that can be online, hybrid or face to face (57%), online programs (57%), and markets to be served (43%). In the global perspective, a model likely to switch from online to hybrid or face to face was the top choice for most (71%) university leaders.

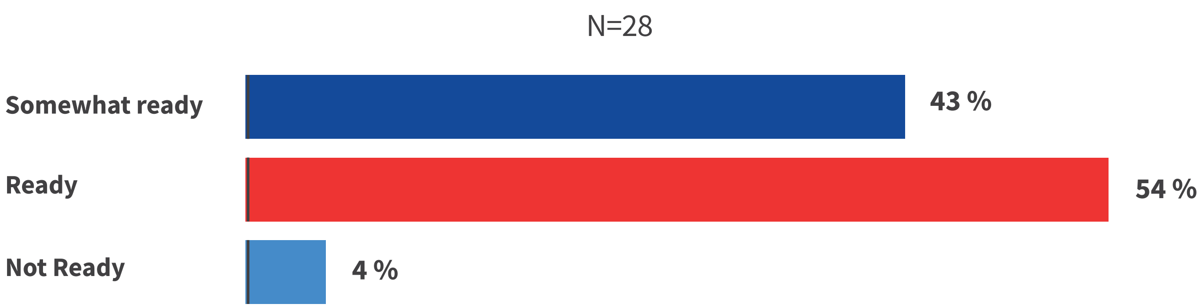


Italy

Initial Institutional Reaction

Readiness to Shift to Remote Education

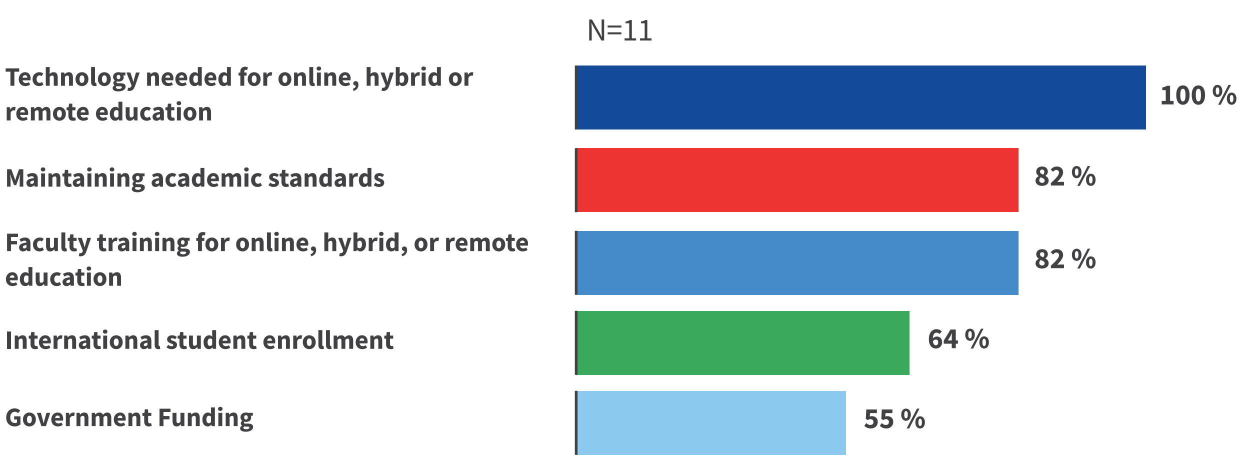
The majority of Italian university leaders (54%) said they were ready while 43% declared that they were somewhat ready. On the other hand, only 4% acknowledged being unprepared.



Italy's result on readiness (54%) is higher than the one observed globally (37%), where, in addition, just over half of the respondents (54%) said they were moderately prepared, and 8% acknowledged that they were unprepared.

Challenges as a Result of COVID-19

Results show that Italy's top challenges were required technology, maintaining academic standards, faculty training, international student enrolment, and government funding.



Three of Italy's main topics are included in the global Top 5. However, international student enrollment, and government funding, fourth and fifth in Italy, are not part of the Top 5 in the global perspective. In turn, emergency financial support for students, and mental health support for students, fourth (45%) and fifth (40%) globally, are not included in Italy's Top 5.

Preparing for 2020-2021

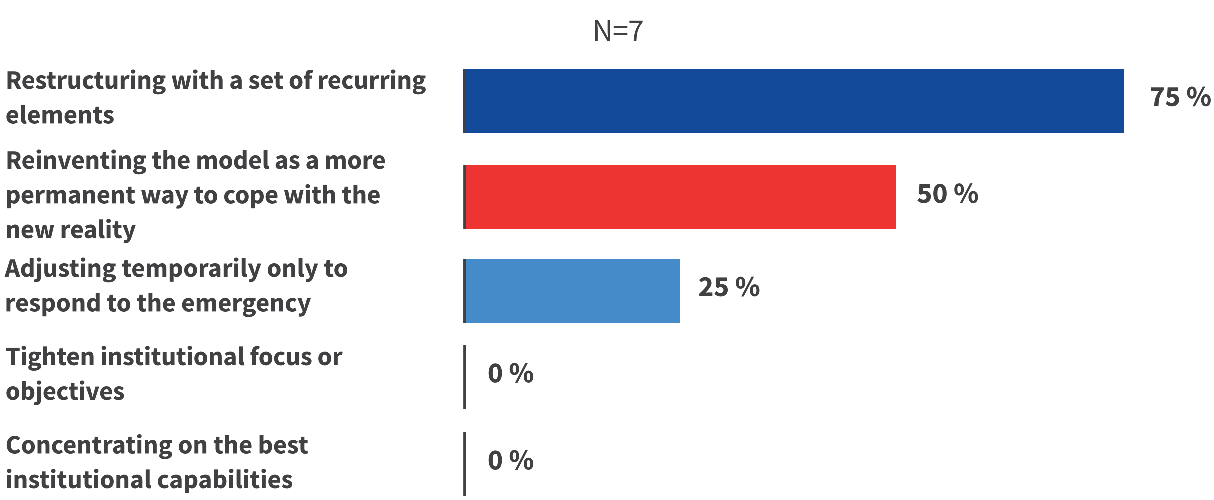
Anticipated Areas of Decrease, Increase or No Change

Student enrollment (56%), institutional revenue (44%), and projects with business and industry (33%) were among the Top topics where Italian leaders anticipated decreases. In addition, programmes supporting entrepreneurship (89%), continuing education (89%), and programmes supporting student employability (78%), were areas where they expected no change. On the other hand, their top choices for increases included financial support for students (44%), investment in infrastructure (33%), and research (22%).

One difference with the global perspective is that the topic of research, first (38%) on the list for no change in the global perspective, is one of Italy's top areas expected to increase.

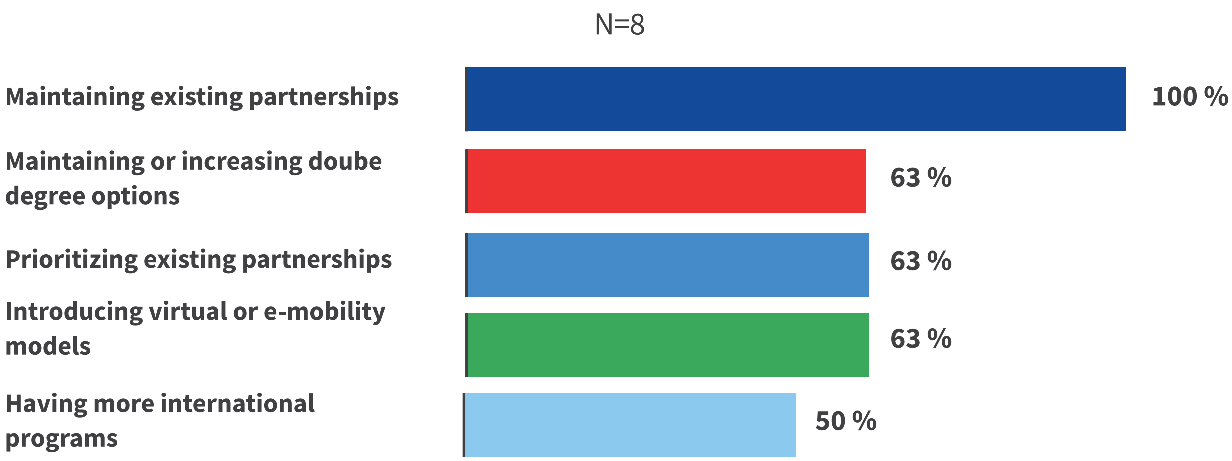
Impact on Financial Model

Restructuring with recurring elements for the years to come (75% frequency) was Italy's main concern, followed by reinventing the model (50% frequency), and temporary adjustments (25% frequency). Temporary adjustments only to respond to the emergency was the most frequent choice globally (47%), suggesting actions probably intended for a short-term impact rather than a long-term effect.



Internationalization

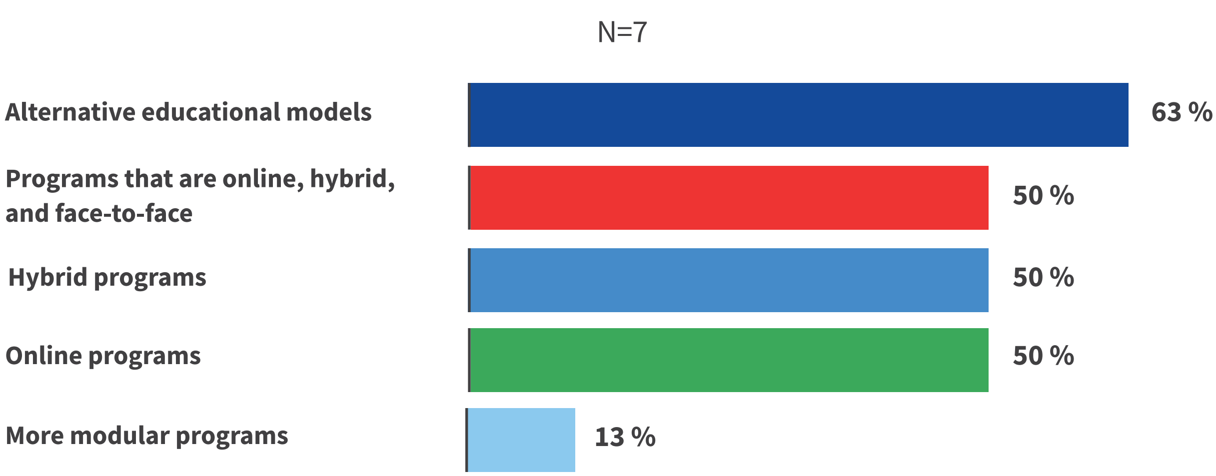
Italy's choices refer to the importance of virtual mobility and partnerships. Their top topics were maintaining partnerships, maintaining or increasing double degree options, prioritizing partnerships, virtual or e mobility, and having more international programs. Strengthening internationalization at home (49%) and limiting study trips (47%), fourth and fifth globally, are not in Italy's Top 5. Similarly, maintaining or increasing double degree options and having more international programs, second and fifth in Italy, are not part of the global Top 5.



Looking Forward

Potential Transformation in 3 or More Years

Italian leaders said that, in the near future, their institutions would be considering alternative educational models (63%), flexible programs that can be online, hybrid or face to face, hybrid programs, and online programs (50% each), as well as more modular programs (13%). In the global perspective, a model likely to switch from online to hybrid or face to face was the top choice for most (71%) university leaders.

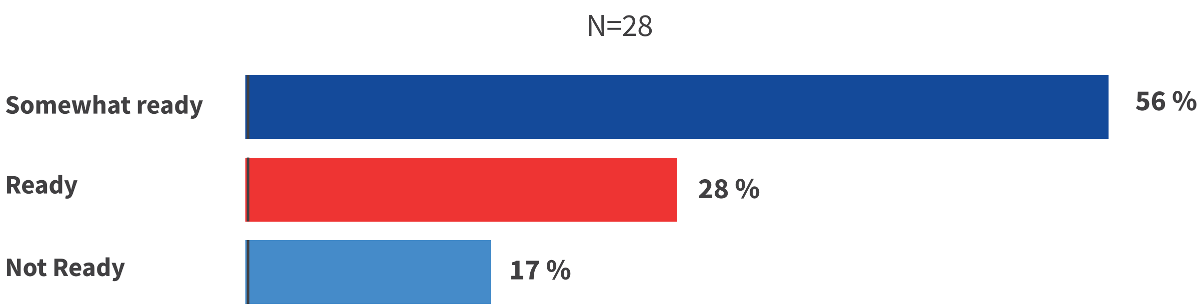


France

Initial Institutional Reaction

Readiness to Shift to Remote Education

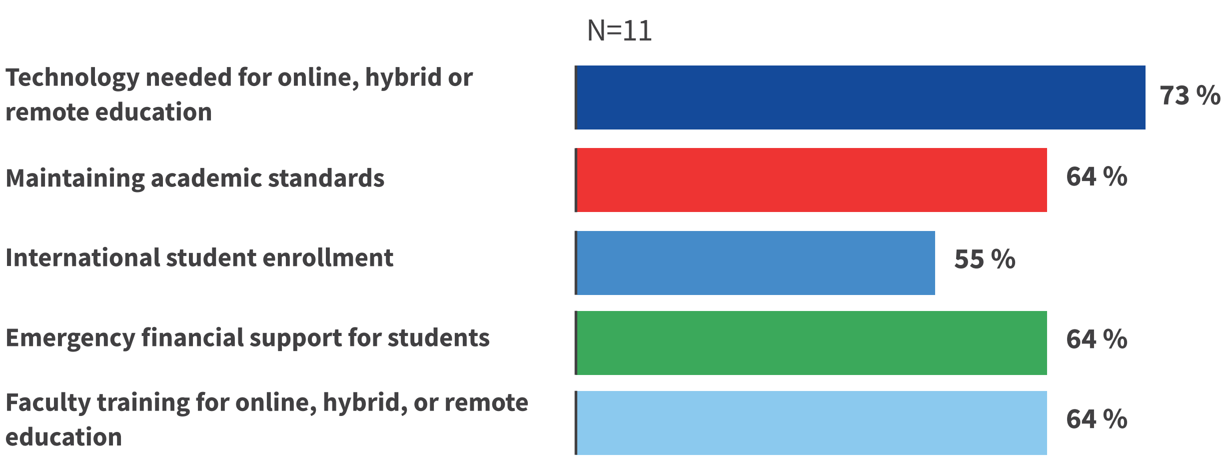
The majority of French university leaders (56%) declared they were somewhat ready. On the other hand, 28% said they were ready, and 17% declared being unprepared.



France's result on readiness (28%) is lower than the one observed in the global perspective (37%), where, in addition, just over half of the respondents (54%) said they were moderately prepared, and 8% acknowledged that they were not ready.

Challenges as a Result of COVID-19

The top challenges reported by French university leaders were required technology, maintaining academic standards, financial support for students, faculty training, and international student enrolment.



Four of France's main topics are included in the global Top 5. However, international student enrollment, fifth in France, is not part of the global Top 5. In turn, mental health support for students, fifth (40%) globally, is not included in France's Top 5.

Preparing for 2020-2021

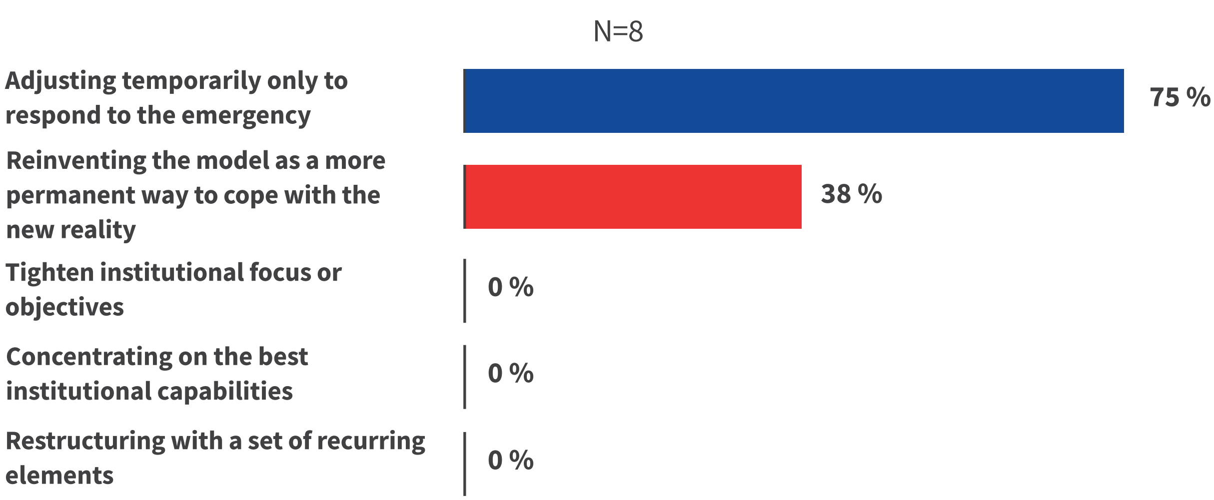
Anticipated Areas of Decrease, Increase or No Change

Student enrollment, projects with business and industry, and fundraising (38% each), were the Top 3 areas where French leaders anticipated decreases. Notwithstanding, institutional revenue (88%), programs supporting student employability (75%), and research (75%) were their Top 3 topics expected not to change. In addition, their Top 3 for increases included investment in infrastructure (63%), financial support for students (50%), and continuing education (25%).

The only major difference, regarding possible areas of decrease, increase or no change, between the global perspective and the French perspective is that the topic of institutional revenue, number one (70%) on the list for decreases in the global perspective, is first on the French list of things expected to remain without change.

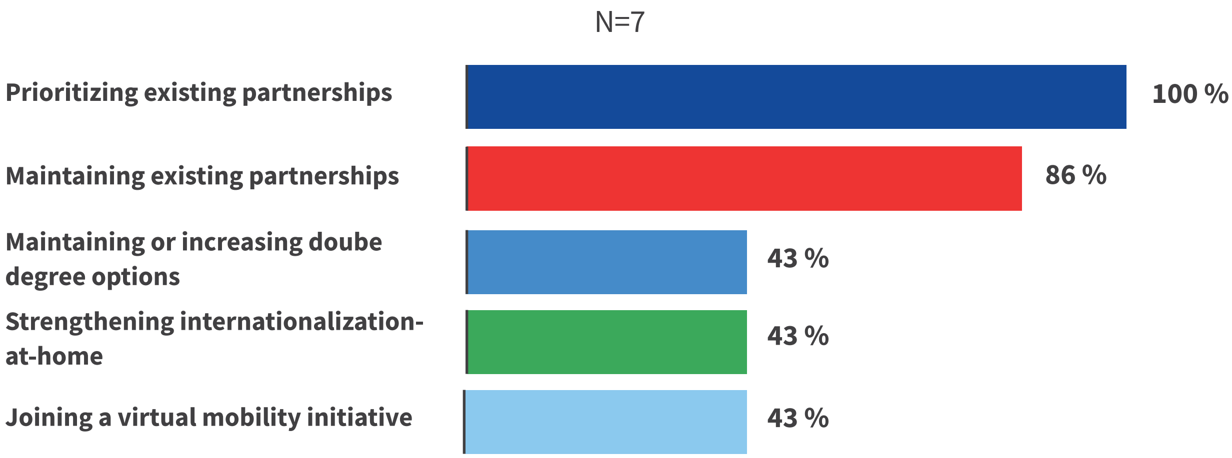
Impact on Financial Model

French leaders said that adjusting temporarily to respond to the emergency (75% frequency) was their main concern, followed by reinventing the model (38% frequency) Adjusting temporarily was also the most frequent choice globally (47%), suggesting actions probably intended for a short-term impact rather than a long-term effect.



Internationalization

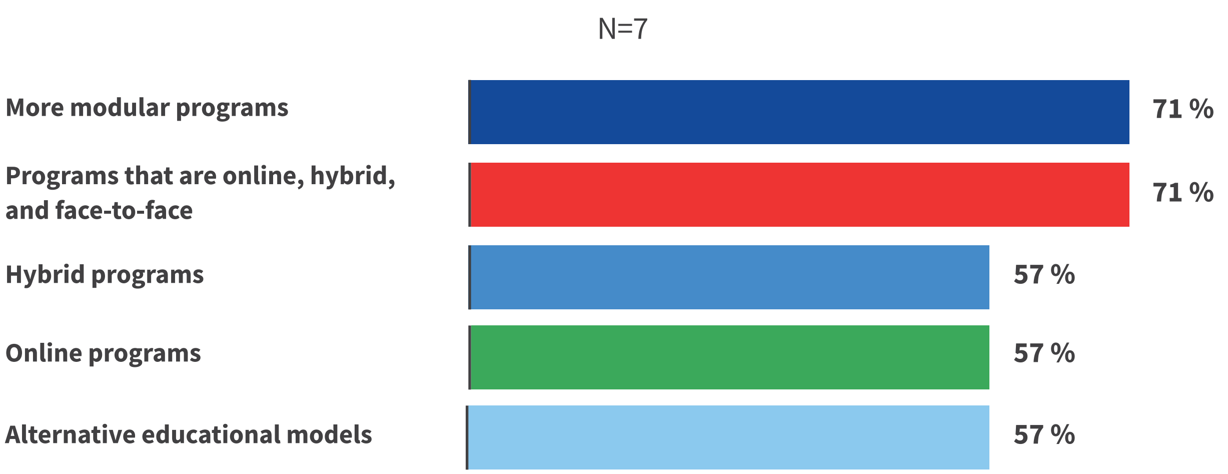
France's main choices refer to the importance of virtual mobility and partnerships. Number one was prioritizing existing partnerships, followed by maintaining partnerships, maintaining or increasing double degree options, strengthening internationalization at home, and joining a virtual mobility initiative. Interestingly, suspending study trips, fifth globally (47%), is not in France's Top 5, and maintaining or increasing double degree options , third in France, is not part of the global Top 5.



Looking Forward

Potential Transformation in 3 or More Years

A great number of French university leaders (71%) declared that, in the near future, their institutions would be implementing flexible programs that can be online, hybrid or face to face or, that they would be working with more modular programs. Other reported ideas include alternative educational models (57%), online programs (57%), and hybrid programs (57%). In the global perspective, a model likely to switch from online to hybrid or face to face was also the top choice for most (71%) university leaders.

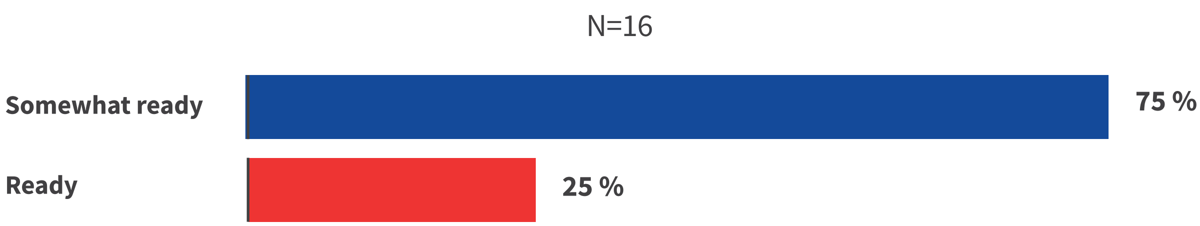


Germany

Initial Institutional Reaction

Readiness to Shift to Remote Education

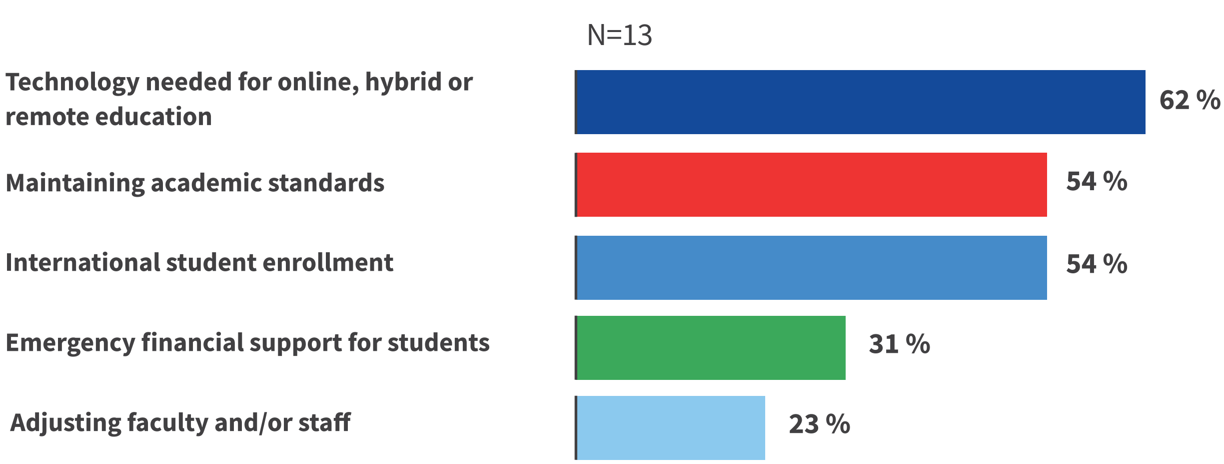
The majority of German leaders (75%) said that they were moderately prepared while 25% declared they were ready. On the other hand, no one mentioned being unprepared.



Germany's result on readiness (25%) is lower than the one observed globally (37%), where, in addition, just over half of the respondents (54%) said they were moderately prepared, and 8% acknowledged that they were unprepared.

Challenges as a Result of COVID-19

Germany's top challenges were required technology, maintaining academic standards, international student enrollment, emergency financial support for students, and adjusting faculty or staff.



Three of Germany's main topics are included in the global Top 5. However, international student enrollment, and adjusting faculty or staff, third and fifth in Germany, are not part of the Top 5 in the global perspective. In turn, faculty training and mental health support for students, first (58%) and fifth (40%) globally, are not included in Germany's Top 5.

Preparing for 2020-2021

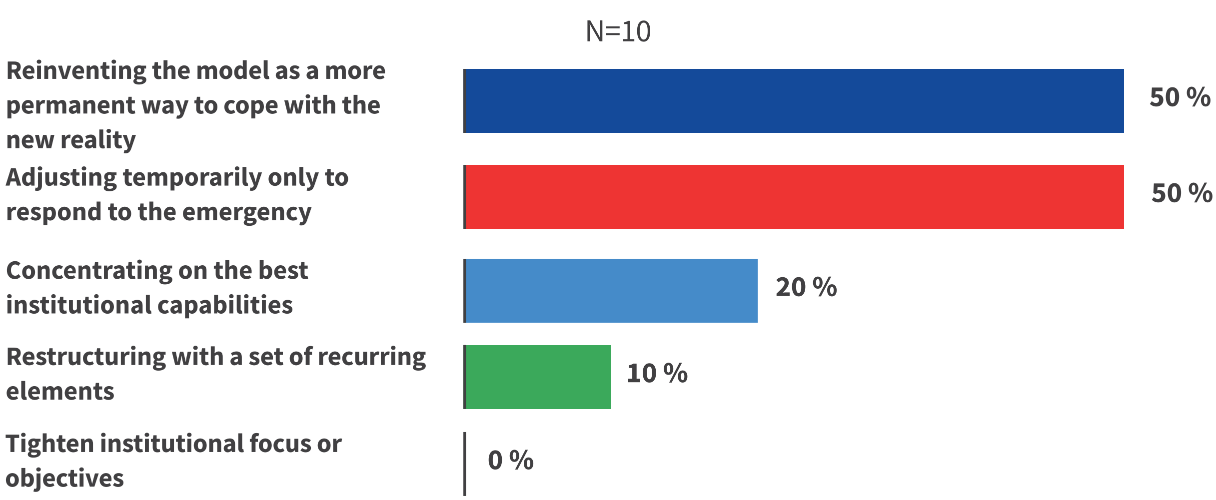
Anticipated Areas of Decrease, Increase or No Change

Student enrollment (60%), and continuing education (40%) were among the top topics where German leaders anticipated decreases. Noticeably, institutional revenue (90%), programmes supporting student employability (80%), and programs supporting entrepreneurship (60%) were areas where they expected no changes. On the other hand, their top choices for increases included investment in infrastructure (70%), financial support for students (40%), and research (20%).

One difference with the global perspective is that the topic of institutional revenue, number one (79%) for decreases globally, is first on the list for no change in Germany. Similarly, research, first (38%) on the list for no change in the global perspective, is one of Germany's top areas expected to increase.

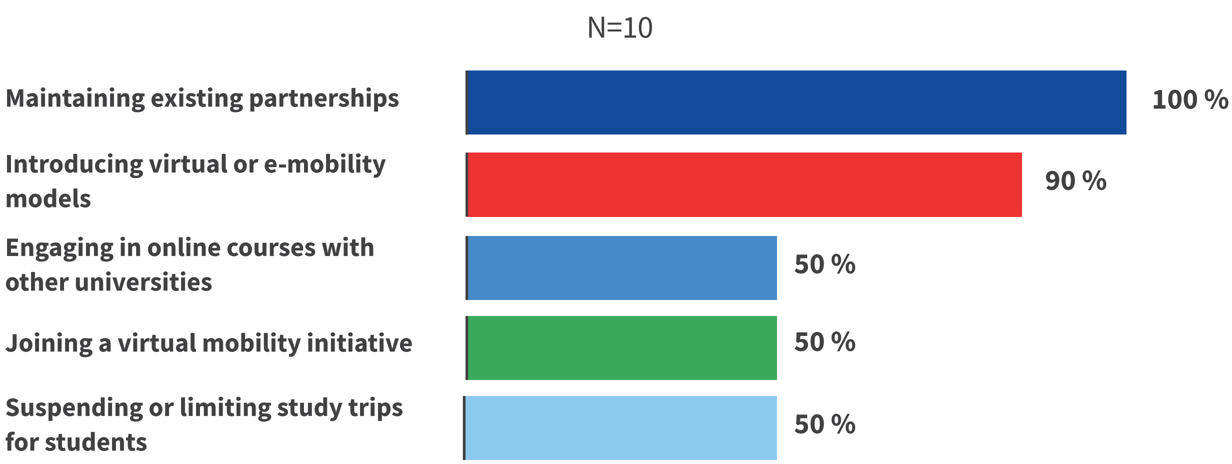
Impact on Financial Model

Adjusting temporarily only to respond to the emergency and reinventing the model (50% frequency each) were Germany's main concerns, followed by concentrating on institutional capabilities (20% frequency) and restructuring (10% frequency). Temporary adjustments only to respond to the emergency was also the most frequent choice globally (47%), suggesting actions probably intended for a short-term impact rather than a long-term effect.



Internationalization

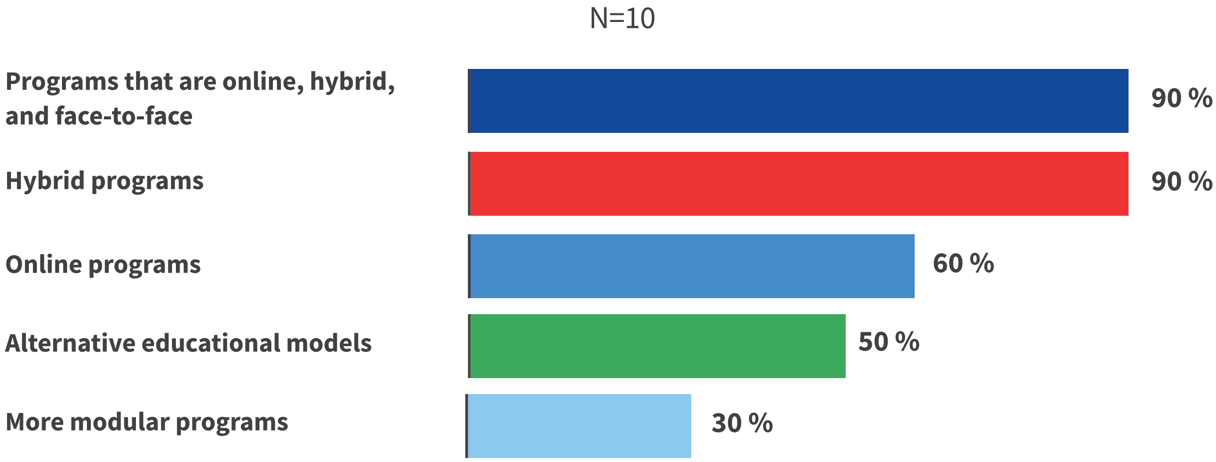
Germany's choices refer to the importance of virtual mobility and partnerships. Their top topics were maintaining partnerships, virtual or e mobility, engaging in online courses with other universities, joining a virtual mobility initiative, and suspending study trips. Prioritizing partnerships (56%) and strengthening internationalization at home (49%), third and fourth globally, are not included in Germany's Top 5. Similarly, engaging in online courses with other universities and joining a virtual mobility initiative, third and fourth in Germany, are not part of the global Top 5.



Looking Forward

Potential Transformation in 3 or More Years

German leaders said that, in the near future, their institutions would be considering flexible programs that can be online, hybrid or face to face as well as hybrid programs (90% each), followed by online programs (60%), alternative educational models (50%), and more modular programs (30%). In the global perspective, a model likely to switch from online to hybrid or face to face was the top choice for most (71%) university leaders.

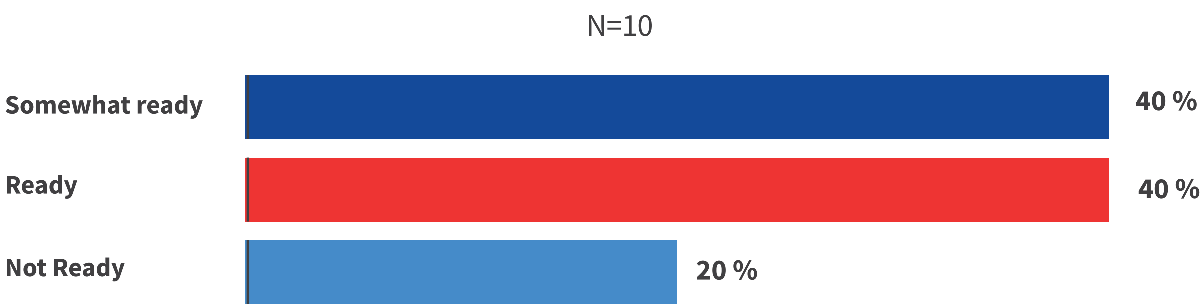


Georgia

Initial Institutional Reaction

Readiness to Shift to Remote Education

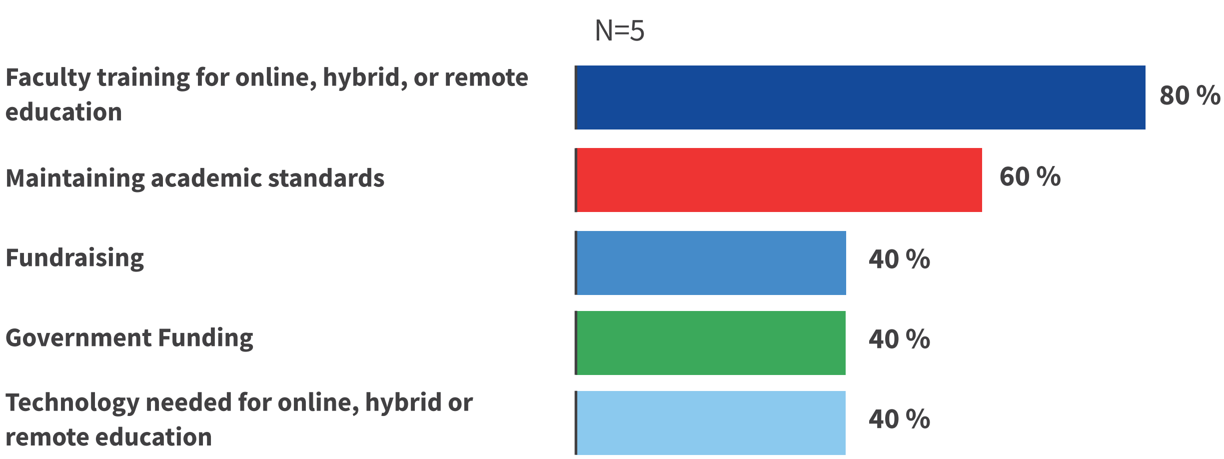
The majority of Georgian university leaders declared that they were either ready (40%) or somewhat ready (40%). On the other hand, 20% declared that they were not ready.



Georgia's result on readiness (40%) is a little higher than the one observed in the global perspective (37%), where, in addition, just over half of the respondents (54%) said they were moderately prepared, and 8% acknowledged that they were unprepared.

Challenges as a Result of COVID-19

The top challenges reported by Georgian university leaders were faculty training, maintaining academic standards, fundraising, government funding, and required technology.



Three of Georgia's main topics are included in the global Top 5. However, fundraising and government funding, third and fourth in Georgia, are not part of the global Top 5. In turn, emergency financial support for students and mental health support for students, fourth (45%) and fifth (40%) globally, are not included in Georgia's Top 5.

Preparing for 2020-2021

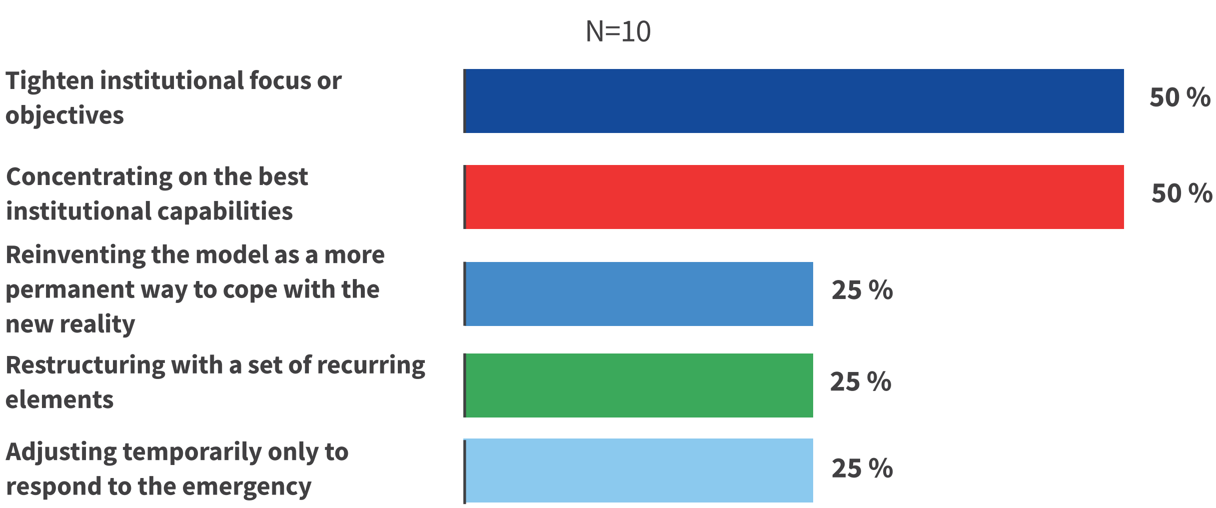
Anticipated Areas of Decrease, Increase or No Change

Investment in infrastructure, research, and projects with business or industry (50% frequency each) were the Top 3 areas where Georgian leaders anticipated decreases. In addition, programs supporting entrepreneurship (75%) and programs supporting student employability (50%) were among their top topics expected not to change. Noticeably, their top choices for increases included student enrollment, institutional revenue, financial support for students, and continuing education (50% frequency in each case).

One major difference between the global and the Georgian perspectives is that the topics of institutional revenue and student enrollment, numbers one (79%) and four (63%) on the list for decreases in the global perspective, are in the Top 3 for increases in Georgia.

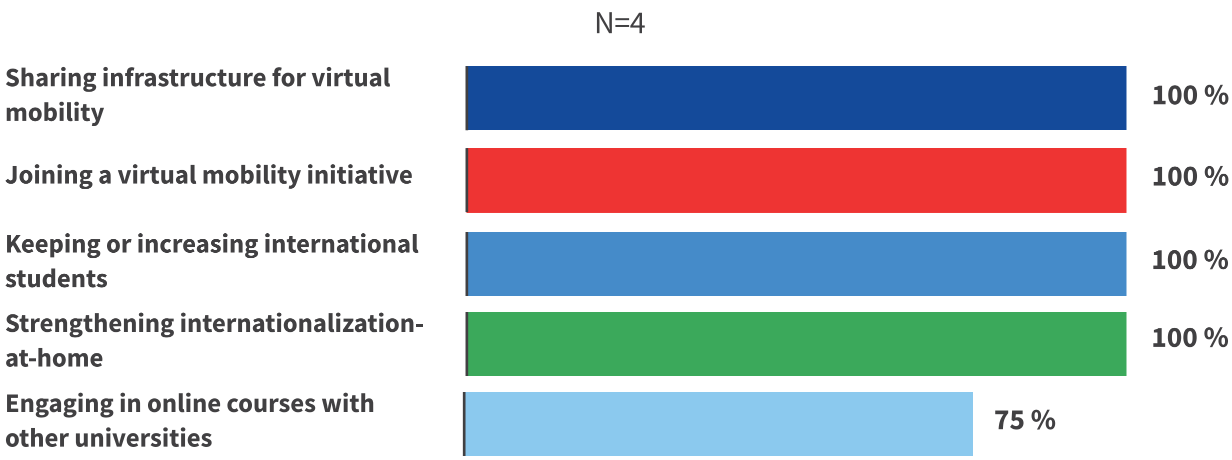
Impact on Financial Model

Georgian leaders declared that tightening institutional objectives and concentrating on best institutional capabilities (50% frequency in each case) were their main concerns, followed by adjusting temporarily to respond to the emergency, reinventing the model, and restructuring (25% frequency each). Adjusting temporarily was the most frequent choice globally (47%), suggesting actions probably intended for a short-term impact rather than a long-term effect.



Internationalization

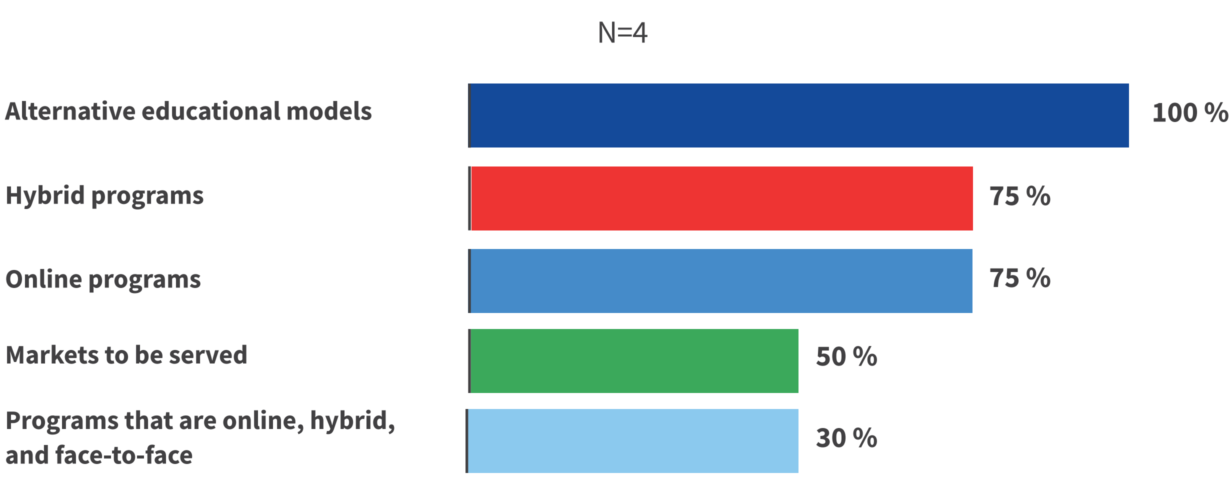
Unlike the global perspective, which stressed the importance of both virtual mobility and partnerships, Georgia's choices mostly refer to the importance of virtual mobility. Georgia's Top 5 included sharing infrastructure for virtual mobility, joining a virtual mobility initiative, keeping or increasing international students, strengthening internationalization at home, and engaging in online courses. Interestingly, strengthening internationalization at home is the only topic in Georgia's Top 5 that is also part of the global Top 5 for internationalization.



Looking Forward

Potential Transformation in 3 or More Years

All Georgian leaders (100%) mentioned that, in the near future, their institutions would be implementing alternative educational models, followed by hybrid programs and online programs (75% each), but also considering flexible programs that can be online, hybrid or face to face and markets to be served (50% each). In the global perspective, a model likely to switch from online to hybrid or face to face was the top choice for most (71%) university leaders.

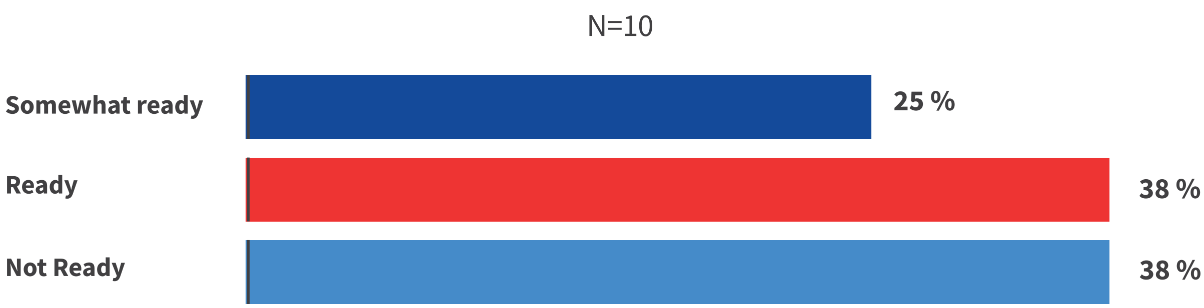


Thailand

Initial Institutional Reaction

Readiness to Shift to Remote Education

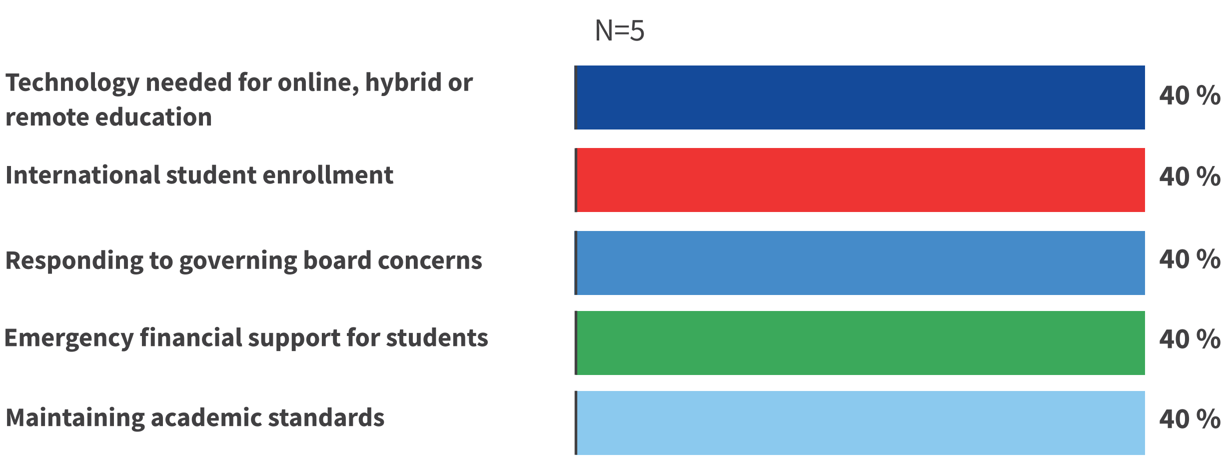
The majority of Thai leaders declared they were either ready (38%) or not ready (38%). On the other hand, 25% said that they were moderately prepared.



Thailand's result on readiness (38%) is similar to the one observed in the global perspective (37%), where, in addition, just over half of the respondents (54%) said they were moderately prepared, and 8% acknowledged that they were unprepared.

Challenges as a Result of COVID-19

The top challenges reported by Thai leaders were required technology, international student enrollment, responding to government board concerns, emergency financial support for students, and maintaining academic standards.



Three of Thailand's main topics are included in the global Top 5. However, international student enrollment and responding to government board concerns, second and third in Thailand, are not part of the global Top 5. In turn, faculty training and mental health support for students, first (58%) and fifth (40%) globally, are not included in Thailand's Top 5.

Preparing for 2020-2021

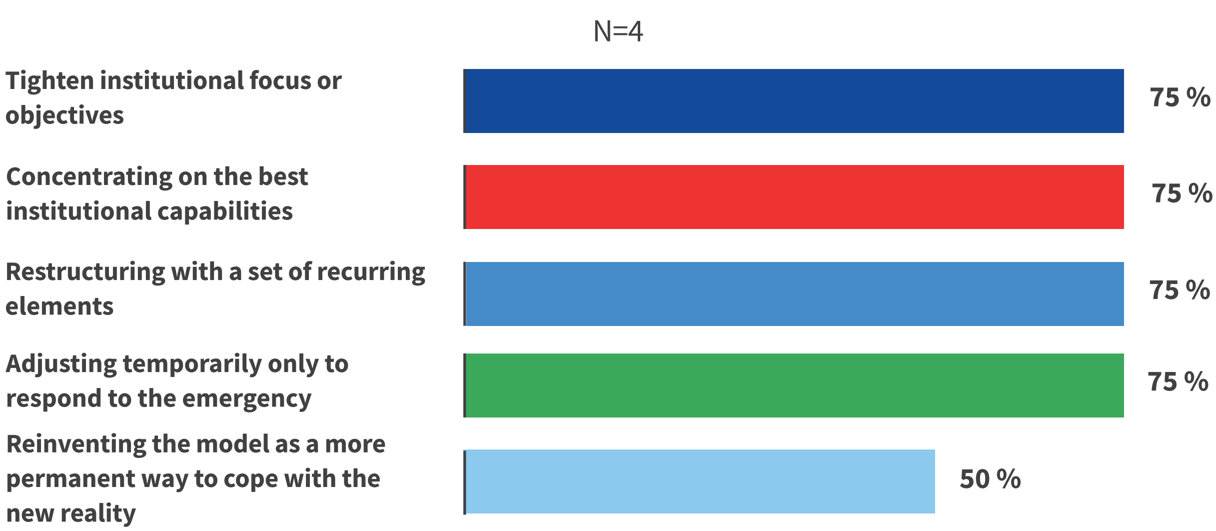
Anticipated Areas of Decrease, Increase or No Change

Institutional revenue (75%) and projects with business and industry (50%) were the top areas where Thai leaders anticipated decreases. In addition, fundraising (75%) and research (50%) were among their top topics expected not to change. Noticeably, their top choices for increases included programs supporting student employability (75%) and student enrollment (50%).

One relevant difference with the global perspective, regarding things expected to increase or decrease, is that the topic of student enrollment, fourth (63%) on the list for decreases in the global perspective, is included in the Top 3 for increases in Thailand.

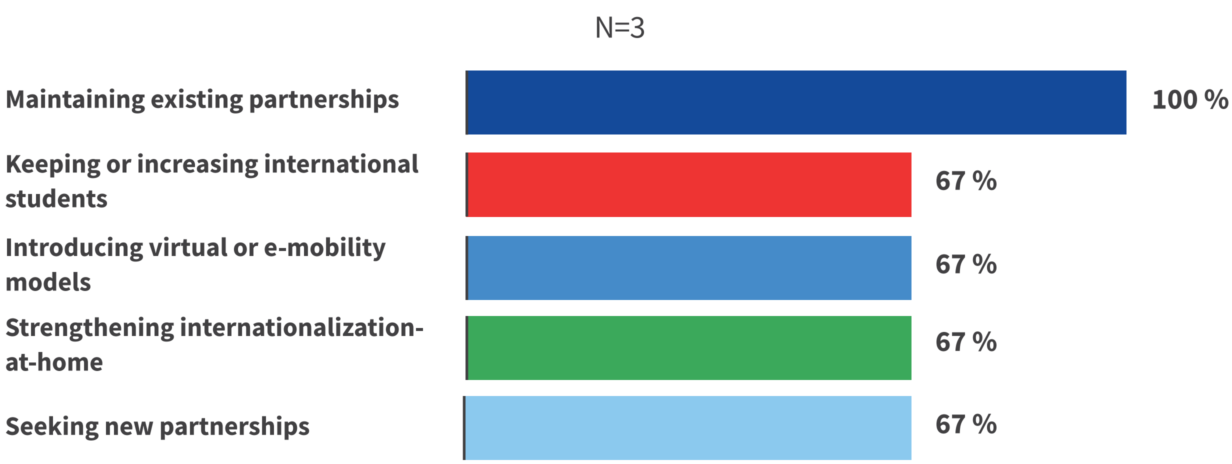
Impact on Financial Model

Thai leaders declared that tightening institutional objectives, concentrating on institutional capabilities, restructuring, and adjusting temporarily to respond to the emergency (75% frequency in each case) were their main concerns, followed by reinventing the model (50% frequency). Adjusting temporarily was the most frequent choice globally (47%), suggesting actions probably intended for a short-term impact rather than a long-term effect.



Internationalization

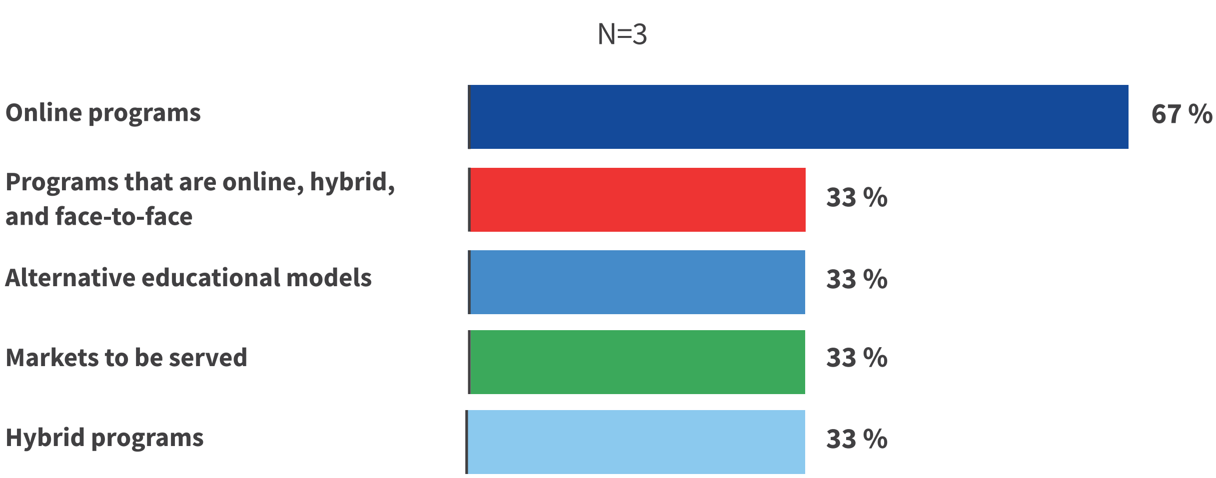
Thailand's main choices refer to the importance of virtual mobility and partnerships. Number one was maintaining partnerships, followed by keeping or increasing international students, introducing virtual mobility, strengthening internationalization at home, and seeking new partnerships. Prioritizing partnerships (56%) and suspending study trips (47%), third and fifth in the global perspective, are not in included in Thailand's Top 5. Similarly, keeping or increasing international students and seeking new partnerships, numbers two and five in Thailand, are not part of the global Top 5.



Looking Forward

Potential Transformation in 3 or More Years

A great number of Thai university leaders (67%) declared that, in the near future, their institutions would be implementing online programs, followed by flexible programs that can be online, hybrid or face to face, alternative educational models, markets to be served, and hybrid programs. In the global perspective, a model likely to switch from online to hybrid or face to face was the top choice for most (71%) university leaders.

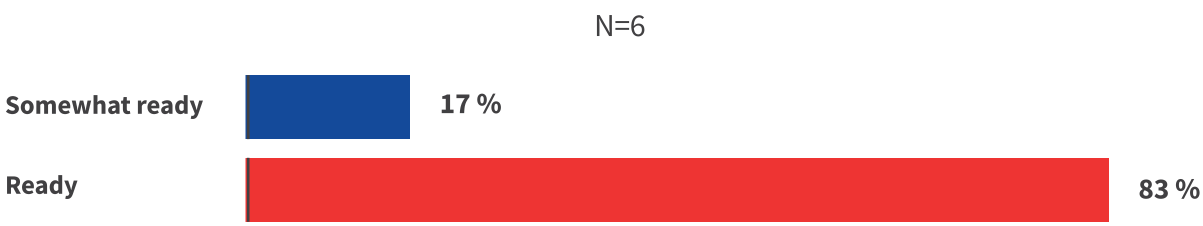


South Korea

Initial Institutional Reaction

Readiness to Shift to Remote Education

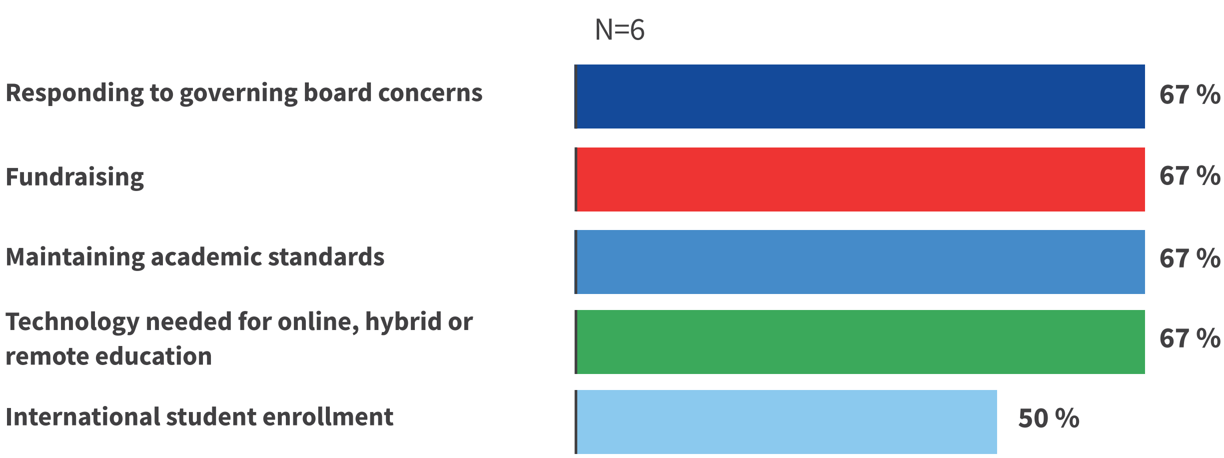
The majority of South Korean university leaders (83%) declared that they were ready. On the other hand, 17% said they were somewhat ready, and no one declared being unprepared.



South Korea's result on readiness (83%) is much higher than the one observed globally (37%), where, in addition, just over half of the respondents (54%) said they were moderately prepared, and 8% acknowledged that they were unprepared.

Challenges as a Result of COVID-19

The top challenges reported by South Korean leaders were responding to government board concerns, fundraising, maintaining academic standards, required technology, and international student enrollment.



Two of South Korea's main topics are included in the global Top 5. However, responding to government board concerns, fundraising, and international student enrollment, first, second and fifth in South Korea, are not part of the global Top 5. In turn, faculty training, financial support for student, and mental health support for students, first (58%), fourth (45%), and fifth (40%) in the global perspective, are not included in South Korea's Top 5.

Preparing for 2020-2021

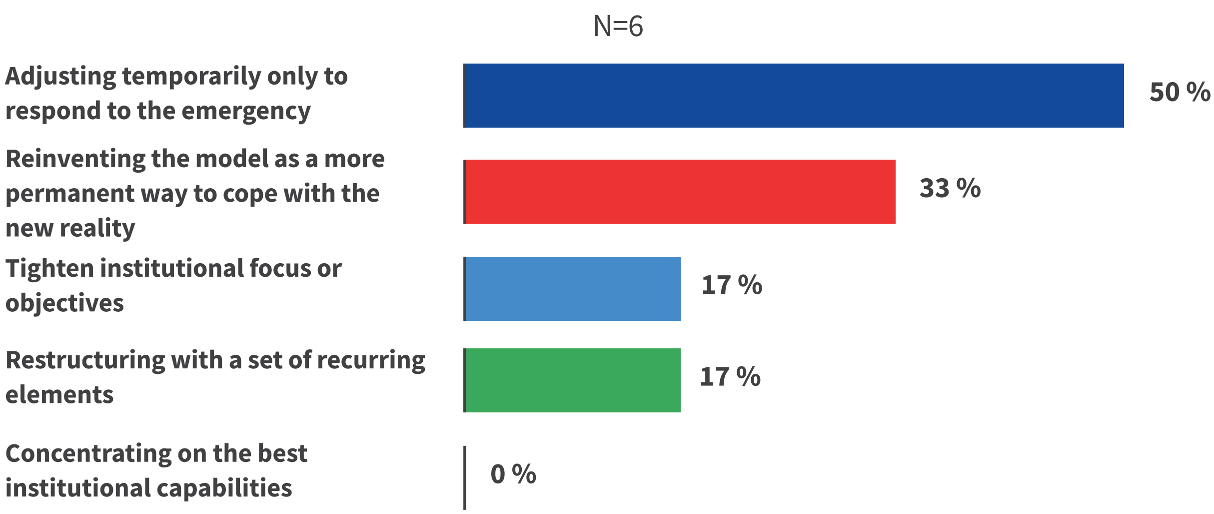
Anticipated Areas of Decrease, Increase or No Change

Institutional revenue (50%) and student enrollment (33%) were the top topics where South Korean university leaders anticipated decreases. In addition, research (83%) and programs supporting entrepreneurship (67%) were among the top areas where they expected no changes. Interestingly, their top choices for increases included investment in infrastructure (33%) and fundraising (33%).

One difference with the global perspective, regarding expected increases or decreases, is that the topics of fundraising and investment in infrastructure, third (65%) and fifth (61%) on the list for decreases in the global perspective, are among the top topics for increases in South Korea.

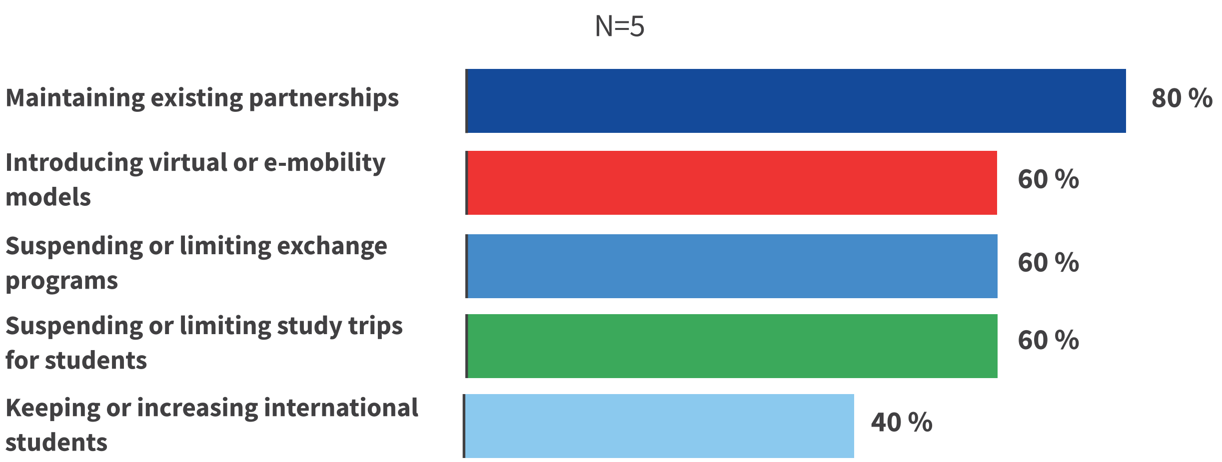
Impact on Financial Model

South Korean leaders declared that adjusting temporarily to respond to the emergency (50% frequency) was their main concern, followed by reinventing the model (33% frequency), tightening institutional objectives, and restructuring (17% frequency in each case). Adjusting temporarily was the most frequent choice globally (47%), suggesting actions probably intended for a short-term impact rather than a long-term effect.



Internationalization

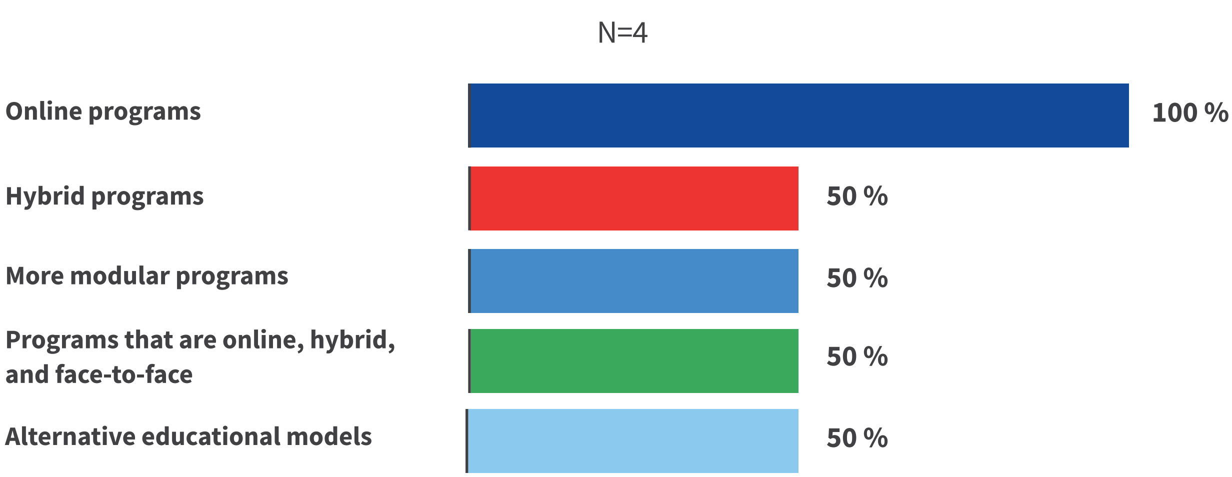
South Korea's choices refer to the importance of virtual mobility and partnerships. Number one was maintaining partnerships, followed by virtual mobility, suspending or limiting exchange programs, suspending or limiting study trips, and keeping or increasing international students, prioritizing partnerships (56%) and strengthnening internationalization at home (49%), third and fourth in the global perspective, are not in included in South Korea's Top 5. Similarly, limiting exchange programs and keeping or increasing international students, numbers three and five in South Korea, are not part of the global Top 5.



Looking Forward

Potential Transformation in 3 or More Years

All of the South Korean university leaders (100%) declared that, in the near future, their institutions would be implementing online programs, followed by flexible programs that can be online, hybrid or face to face, alternative educational models, more modular programs, and hybrid programs. In the global perspective, a model likely to switch from online to hybrid or face to face was the top choice for most (71%) university leaders.

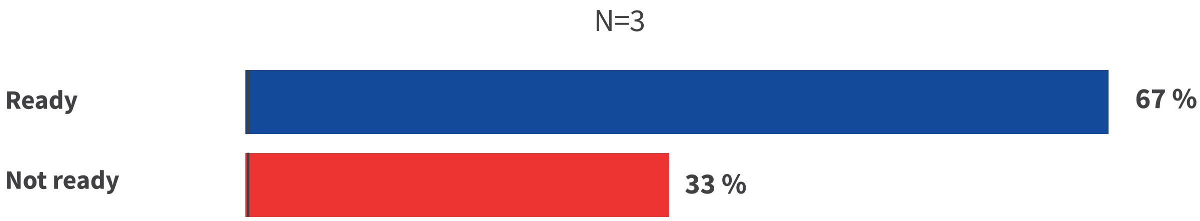


South Africa

Initial Institutional Reaction

Readiness to Shift to Remote Education

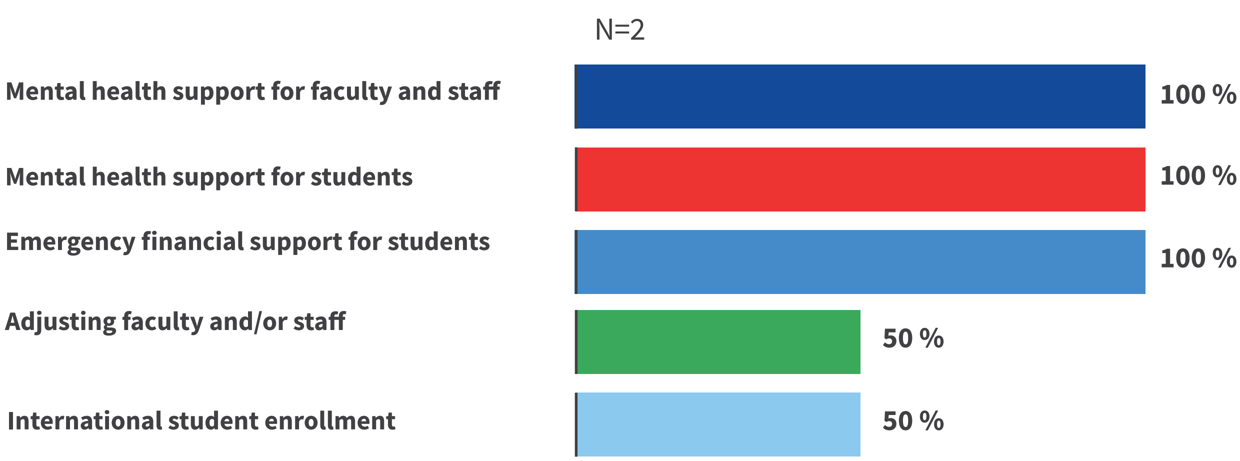
The majority of South African university leaders (67%) declared that they were ready. On the other hand, 33% said they were unprepared, and no one declared being somewhat ready.



South Africa's result on readiness (67%) is higher than the one observed globally (37%), where, in addition, just over half of the respondents (54%) said they were moderately prepared, and 8% acknowledged that they were unprepared.

Challenges as a Result of COVID-19

The top challenges reported by South African leaders were mental health support for faculty and staff, mental health support for students, emergency financial support for students, adjusting faculty and/or staff, and international student enrollment.



Two of South Africa's main topics are included in the global Top 5. However, mental health support for faculty and staff, adjusting faculty or staff, and international student enrollment, first, fourth and fifth in South Africa, are not part of the global Top 5. In turn, faculty training, required technology, and maintaining academic standards, first (58%), second (54%) and third (53%) in the global perspective, are not included in South Africa's Top 5.

Preparing for 2020-2021

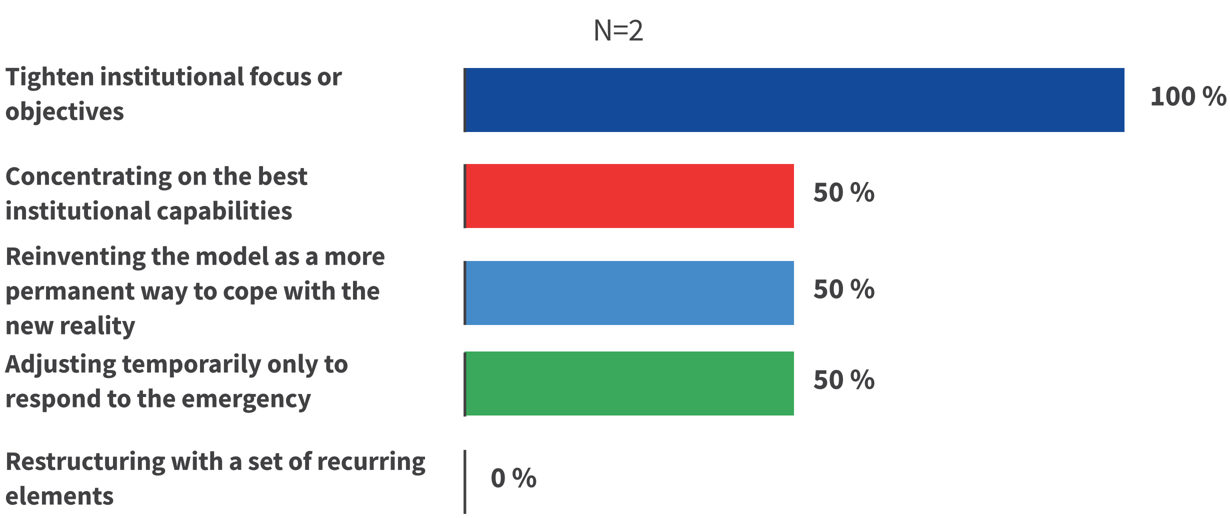
Anticipated Areas of Decrease, Increase or No Change

Institutional revenue, student enrollment, and research (100% each) were the top topics where South African leaders anticipated decreases. In addition, programs supporting student employability (50%) was the only area where they expected no change. Interestingly, their top choices for increases included programs supporting entrepreneurship (100%), investment in infrastructure (50%) and financial support for students (50%).

One difference with the global perspective is that programs supporting entrepreneurship, number two (36%) on the list for no change in the global perspective, is number one on the list for increases in South Africa.

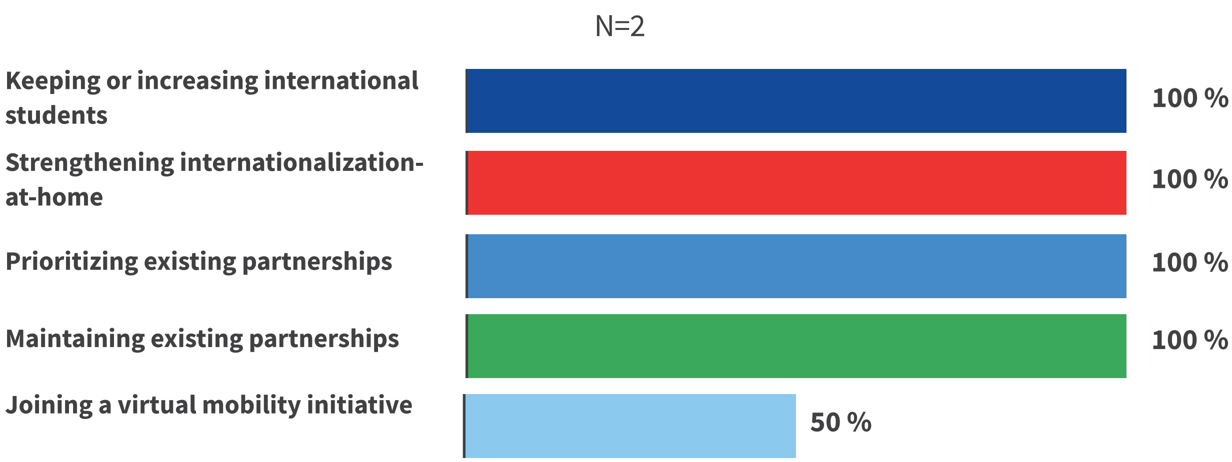
Impact on Financial Model

South African leaders declared that tightening institutional objectives (100% frequency) was their main concern, followed by adjusting temporarily to respond to the emergency, reinventing the model, and concentrating on best institutional capabilities (50% frequency in each case). Adjusting temporarily was the most frequent choice globally (47%), suggesting actions probably intended for a short-term impact rather than a long-term effect.



Internationalization

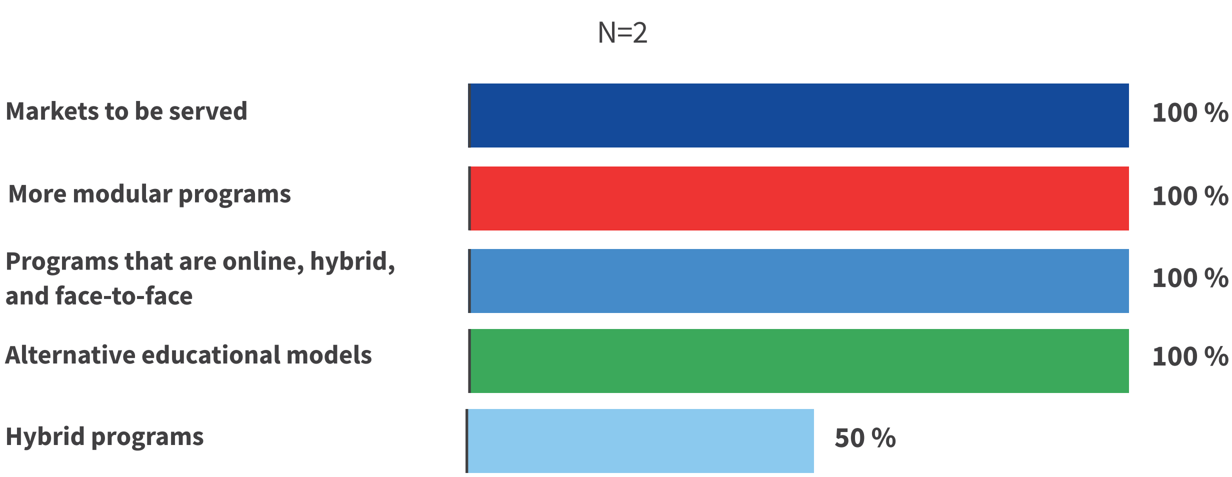
South Africa's choices refer to the importance of virtual mobility and partnerships. The top topics were prioritizing partnerships, strengthening internationalization at home, maintaining partnerships, and keeping or increasing international students, followed by joining a virtual mobility initiative. Introducing virtual mobility models (63%) and limiting study trips (47%), second and fifth globally, are not in included in South Africa's Top 5. Similarly, keeping or increasing international students, and joining a virtual mobility initiative, numbers one and five in South Africa, are not part of the global Top 5.

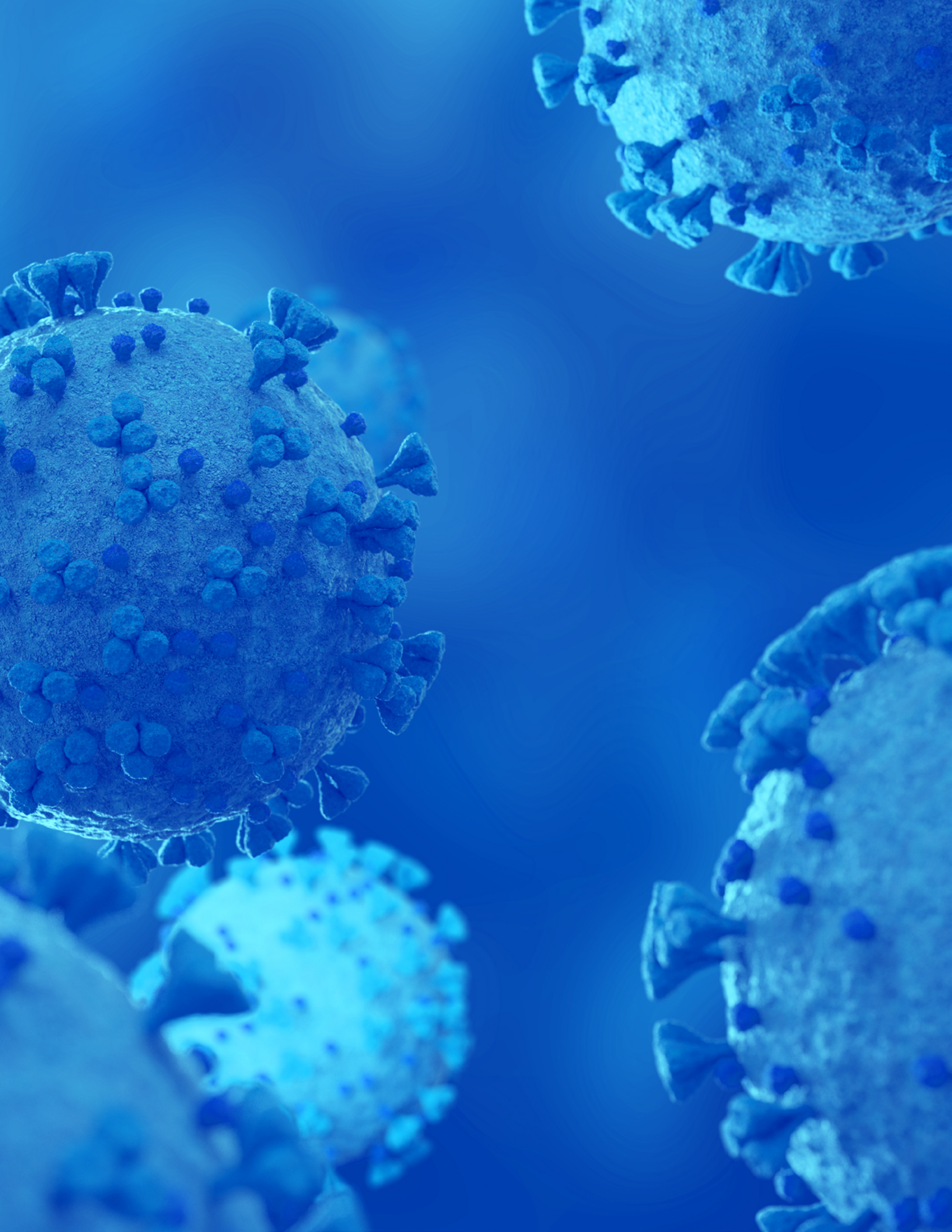


Looking Forward

Potential Transformation in 3 or More Years

All of the South African university leaders (100%) declared that, in the near future, their institutions would be considering flexible programs that can be online, hybrid or face to face, alternative educational models, more modular programs, and markets to be served, followed by hybrid programs (50%). In the global perspective, a model likely to switch from online to hybrid or face to face was the top choice for most (71%) university leaders.





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