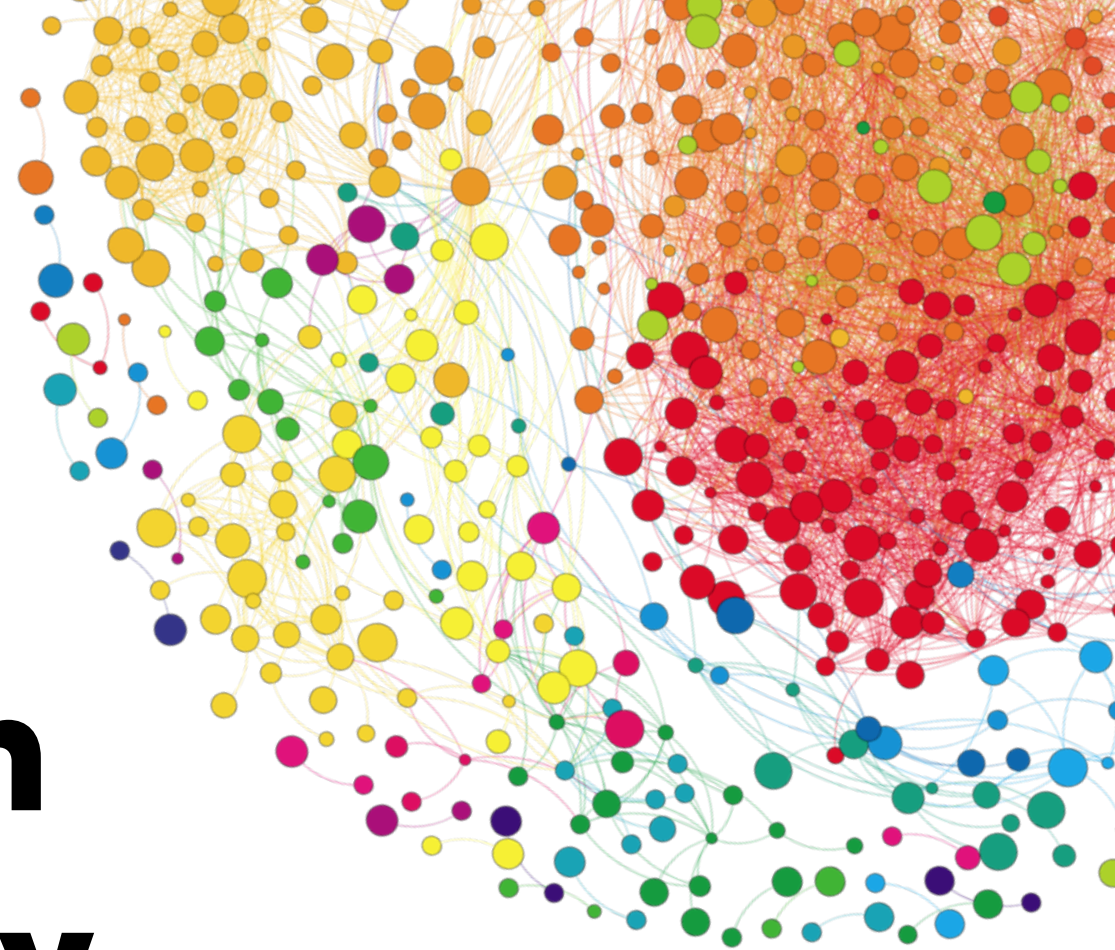


# Annual Insights. Higher Education Digital Capability.

Results from the annual Digital Transformation survey of HolonIQ's Global Higher Education Network conducted in December 2021



# About the research.

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This report summarizes results from HolonIQ's annual Digital Transformation survey, conducted with the Global Higher Education Network. The survey references the Higher Education Digital Capability (HEDC) Framework, which is informed by global academic research and input from higher education leaders internationally. The HEDC framework offers an overarching view for institutions to map and benchmark digital capabilities across the learner lifecycle, ultimately to support practical and sustainable approaches to digital services and online learning.

## **Global Higher Education Network**

HolonIQ's Global Higher Education Network consists of 3,800+ leaders from higher education institutions and other organizations that work within, or support the sector including tech companies and EdTech, investors, government bodies and professional associations.

[holoniq.com/global-higher-education-network/](https://holoniq.com/global-higher-education-network/)

## **Industry Insights on Digital Capability in HE**

This special analysis forms part of a longitudinal study into digital capability in Higher Education. Through the exploration of cross-sectional data, this report includes perspectives from a diverse mix of stakeholders globally and builds on the findings of the 2020 Global Higher Education Digital Capability report.

# Mapping digital capability to the learner lifecycle.

DEMAND AND DISCOVERY (DD)				LEARNING DESIGN (LD)				LEARNER EXPERIENCE (LX)				WORK & LIFELONG LEARNING (WL)			
PRODUCT STRATEGY	MARKETING PROCESSES	STUDENT RECRUIT.	ENROLMENT MGMT	CURRIC. DESIGN	DIGITAL CONTENT & C'WARE	SUBJECT MATTER EXPERTISE	TEACHING STRATEGIES	ACADEMIC ADMIN.	LEARNING & ACADEMIC EXPERIENCE	STUDENT LIFE	ASSESS. & VERIFY	WORK INTEGRATED LEARNING	CAREER PLANNING & PLACEMENT	INDUSTRY & BUSINESS ENGAGE.	ALUMNI & CONTINUING EDUCATION
1.01 MARKET INSIGHTS & TRENDS	2.01 STUDENT CRM	3.01 RECRUIT. EVENTS	4.01 COURSE SELECTION & GUIDANCE	5.01 DIGITAL DESIGN PRINCIPLES	6.01 DIGITAL CONTENT CREATION	7.01 DESIGNING FOR DIGITAL LEARNING	8.01 LEARNER NEEDS & ANALYTICS	9.01 FACULTY PROF DVLP	10.01 STUDENT PORTAL & LMS	11.01 ONBOARDING & ORIENTATION	12.01 TESTS & EXAMS	13.01 JOB SKILL BUILDING	14.01 EVALUATE SKILLS	15.01 INDUSTRY COLLAB & P'SHIPS	16.01 CONTINUING EDUCATION
1.02 CUSTOMER NEEDS	2.02 COMMS & CAMPAIGN MGMT	3.02 CHANNEL P'SHIPS	4.02 APPLICATION & ADMISSIONS	5.02 PROGRAM STRUCTURE	6.02 IMMERSION, SIMULATION & LAB	7.02 FACULTY EXPERTISE & SPECIALISMS	8.02 DESIGNING ASSESSMENT	9.02 FACULTY MGMT & SUPPORT	10.02 SYNCH. LEARNING	11.02 WELLBEING & MENTAL HEALTH	12.02 PORTFOLIOS & PRACTICAL	13.02 WORKPLACE SIMULATION & PROJECTS	14.02 CAREER PLANNING SERVICES	15.02 PROF & INDUSTRY ASSOC.	16.02 INDUSTRY MENTORING
1.03 COMPETIT. & ALTERNATES	2.03 MARKETING AUTOMATION	3.03 SCHOOLS & COMMUNITY OUTREACH	4.03 RECOGNIZE PRIOR LEARNING	5.03 LEARNING ENVIR. & PLATFORMS	6.03 OER & CONTENT LICENSING	7.03 SOURCING & MANAGING EXPERTISE	8.03 EXPERIENTIAL LEARNING APPROACHES	9.03 TIMETABLING & SCHEDULE MGMT	10.03 ASYNCH. LEARNING	11.03 STUDENT CLUBS & SOCIETIES	12.03 ASSESSMENT FEEDBACK	13.03 INTERNSHIPS & PLACEMENTS	14.03 CAREER & RECRUIT. EVENTS	15.03 CUSTOMIZED PROGRAMS (B2B)	16.03 ALUMNI ENGAGE.
1.04 NEW BUSINESS MODELS	2.04 SOCIAL MEDIA	3.04 SCH'SHIP PROGRAMS	4.04 TUITION FINANCING	5.04 LEARNING DELIVERY MODELS	6.04 MANAGING INTEGRATED CONTENT	7.04 SPECIALIST INDUSTRY PARTNERS	8.04 DESIGNING GROUP WORK	9.04 RETENTION & LEARNING SUPPORT	10.04 INTERACTIVE LEARNING & SERVICES	11.04 VOLUNTEER. & STUDENT L'SHIP	12.04 PEER & GROUP ASSESS.	13.04 STUDENT WORK	14.04 JOB APPLICATION SUPPORT	15.04 EDUCATION AS EMPLOY. BENEFIT	
		3.05 B2B RECRUIT. & P'SHIPS		5.05 ACCREDITAT			8.05 PERSONAL. & ADAPTIVE LEARNING	9.05 REGULATORY COMPLIANCE	10.05 LEARNING RESOURCES	11.05 STUDENT VOICE & SURVEYS	12.05 BADGE & CREDENTIAL	13.05 ENT'SHIP & STARTUPS	14.05 JOB FINDING & GRADUATE PLACEMENT		
				5.06 CURRICULUM QUALITY MGMT					10.06 LIBRARY SERVICES	11.06 EXCHANGE PROGRAMS	12.06 GRADUATION & SUCCESS				

# Higher Education Digital Capability Framework

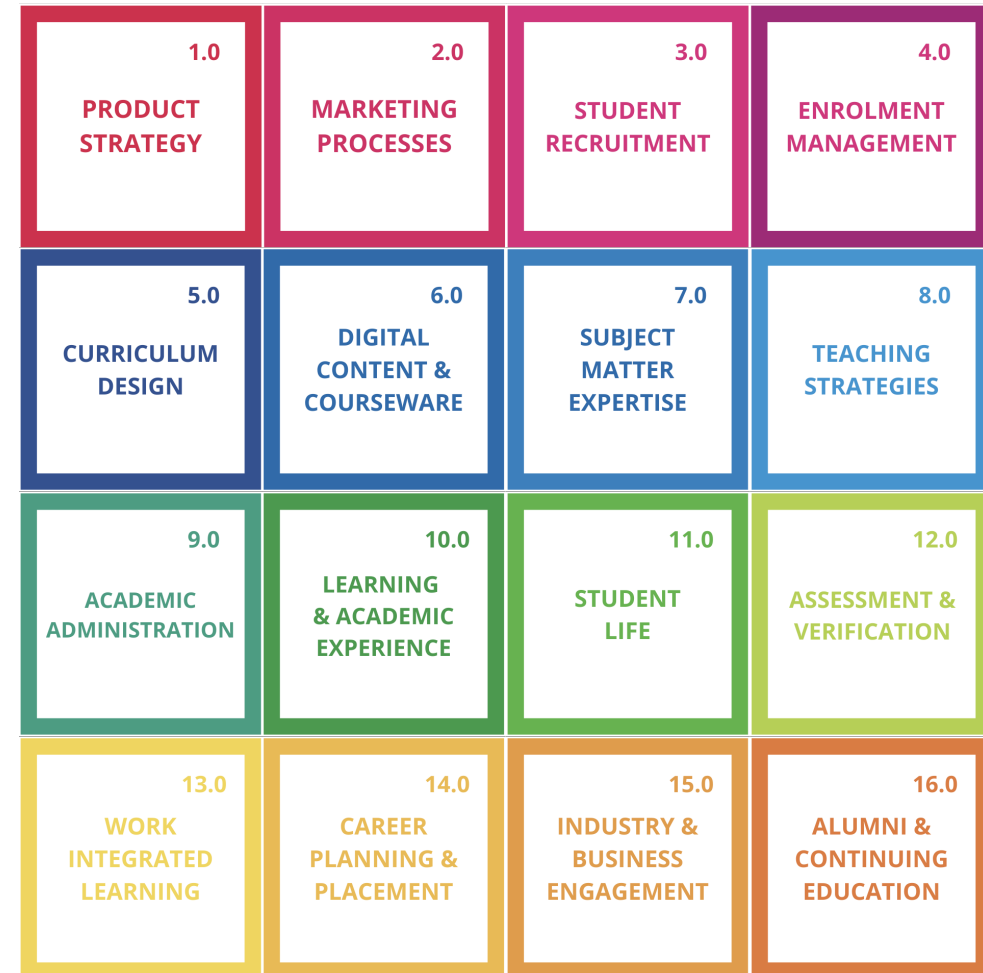
The Higher Education Digital Capability (HEDC) Framework is a learner-focused, practical and flexible approach to mapping and measuring digital capability in higher education institutions.

**DEMAND AND DISCOVERY (DD).** Puts institutional strategy, insights and customer (student) focus at the start of the journey and establishes the importance of data to connect and personalize the student experience at every stage.

**LEARNING DESIGN (LD).** Picks up the learner focus and outlines capabilities and emerging skill sets in designing for diverse needs, environments and modalities.

**LEARNER EXPERIENCE (LX).** Sits at the heart of the lifecycle to profile capabilities that support student life, community and wellbeing as well as learning experiences, academic progress and assessment.

**WORK & LIFELONG LEARNING (WL).** Completes the lifecycle and considers how learners can be supported as they choose and change careers throughout their lives with continued education needs.



# 4 Dimensions, 16 Domains and 70+ Capabilities

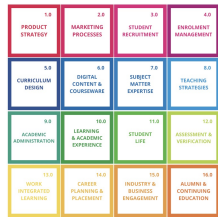
The Higher Education Digital Capability Framework is built on four core dimensions with sixteen underlying domains. Each domain is comprised of multiple blocks that represent digital capabilities. The Framework acknowledges educational literature on digital capability and grounds these in current practice using ongoing consultation, research and analysis with higher education leaders around the world.

**4**  
CORE DIMENSIONS



Four core capability dimensions, mapped to the higher education learner lifecycle

**16**  
CAPABILITY DOMAINS



Each dimension breaks down into four capability domains (themes) for deeper analysis. These are groups of capabilities needed to successfully deliver on digital learning at each stage of the lifecycle

**70+**  
CAPABILITY BLOCKS



16 capability domains expand into 70+ capability blocks. A capability block is expressed as a statement, against which an institution can rate its performance and the importance of the capability



- 01
- 02
- 03
- 04
- 05
- 06
- 07

Executive Summary

Respondent Profile

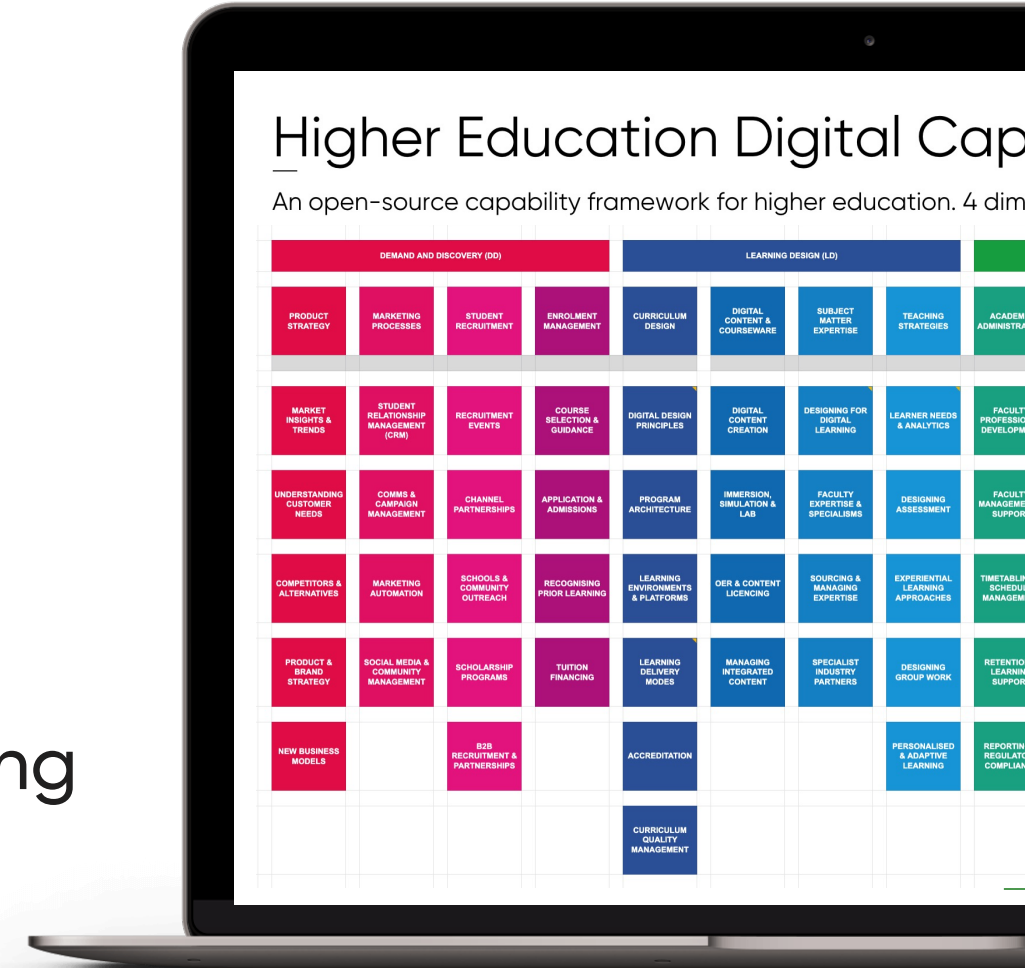
DD. Demand and Discovery

LD. Learning Design

LX. Learner Experience

WL. Work and Lifelong Learning

Next Steps



# Executive Summary

# Digital adoption & transformation is the biggest challenge in HE. Building digital capability is critical.

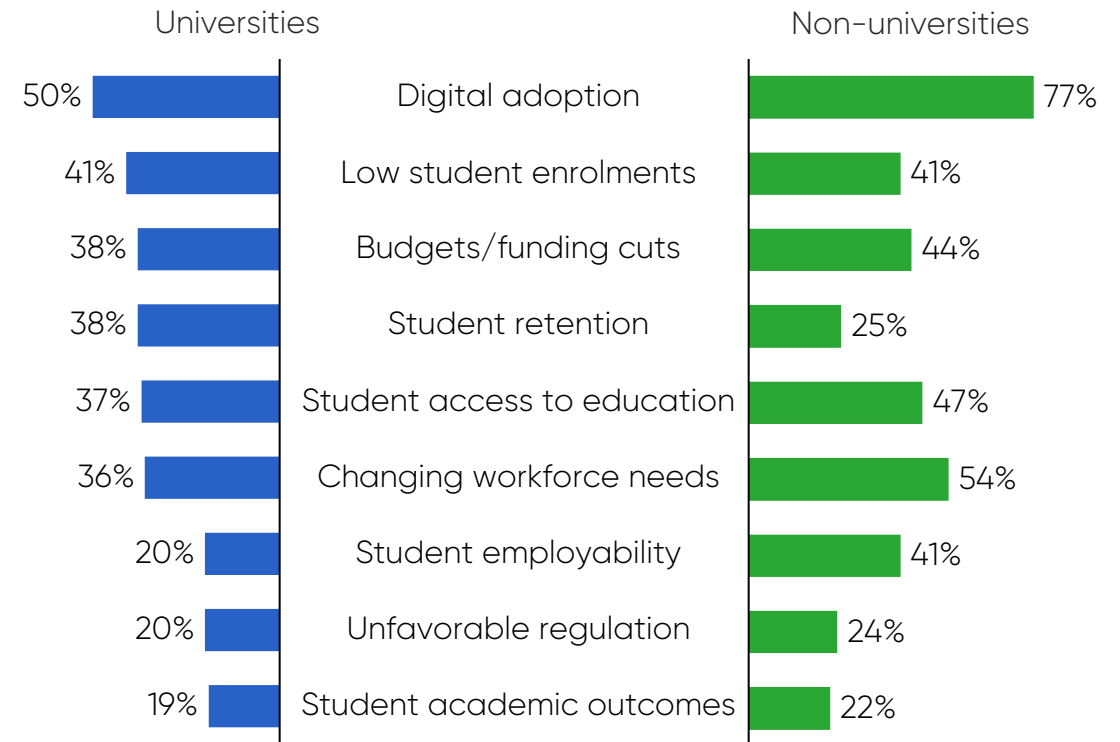
Digital adoption and transformation is still the greatest challenge across regions globally. For universities, low student enrolments, retention, budget cuts and access are also top of mind.

Changing workforce needs are reported as challenges for both university and non-university stakeholders across North America, Europe and Asia.

*"I think universities are now reacting to the effect of the pandemic but big changes are coming in the next years. Universities are just realizing what happened in 2020 but are still not clear on how to solve the issues".*

*"The formal educational institutions that have not managed to update themselves will disappear. As many sectors continue to evolve, I think that the biggest change will be lifelong learning. A profession suddenly is not for life".*

## CHALLENGES IN HIGHER EDUCATION



Question. What are the biggest challenges facing your institution right now? / What are the biggest challenges facing Higher Education right now?



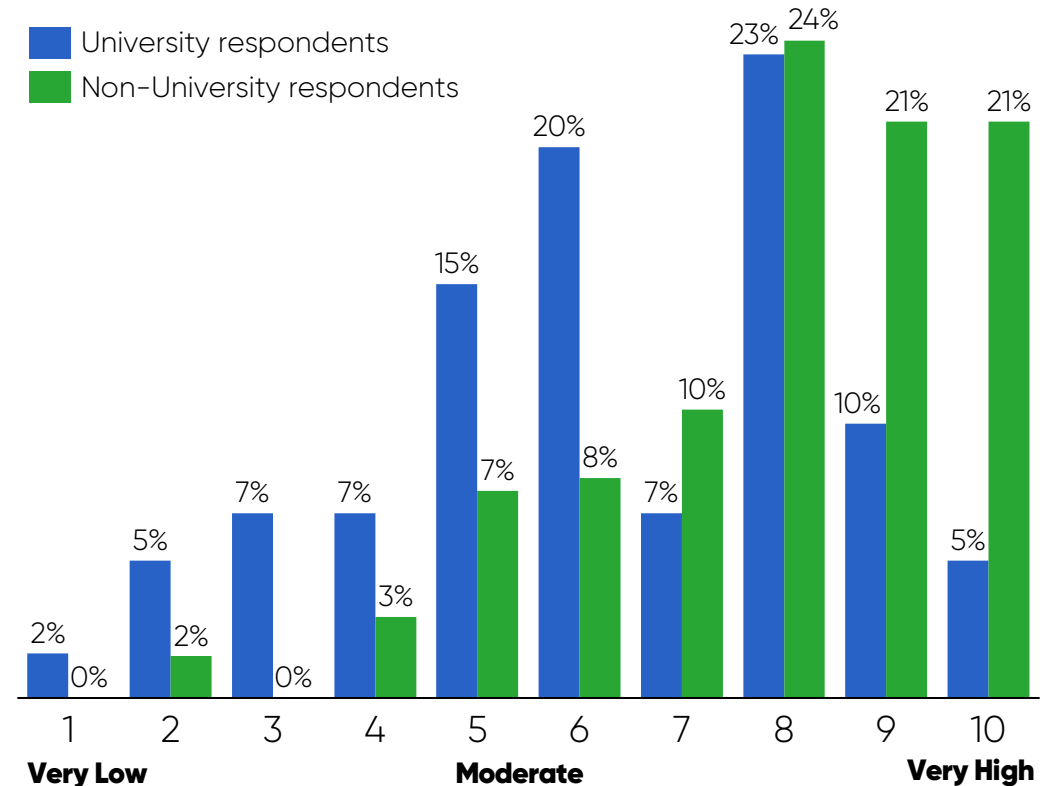
# Digital Maturity. University and non-university stakeholders report increasing digital maturity.

Almost half (45%) of the university respondents assessed their institution's overall digital maturity as 'high' or 'very high' (7-10). Universities are reporting increases in digital maturity compared to 2020, with a greater number of institutions rating their overall maturity as 'moderate' (42% v 36% in 2020).

A majority of non-university respondents are EdTech or technology organisations that work in the higher education sector. Not surprisingly 66% identified their organisation's level of digital maturity as 'high' or 'very high' (7-10), but recognise the work required to remain digitally competent.

*"There is a challenge of internal culture - the digital transformation process is more about strategy and culture than anything else".*

## DISTRIBUTION OF DIGITAL MATURITY



Question. Rate the overall digital maturity of your institution

# Impacts of COVID are mixed for universities; some better off, others worse. 2/3 of non-university stakeholders report being in a better position as a result of COVID.

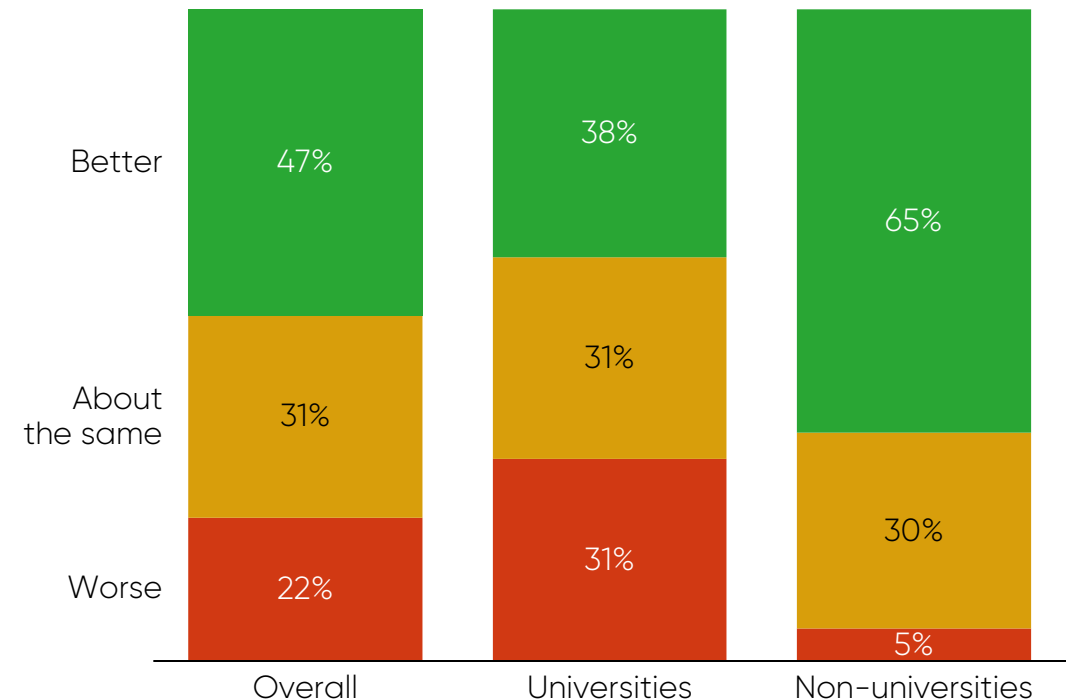
95% of non-university stakeholders indicated they were either in the same or better position as a result of COVID impacts, with only 4% reporting they were worse off.

In contrast, the COVID experience for university stakeholders is mixed and roughly spread evenly across being in a better, worse or same position as a result of the global pandemic.

*"There were drastic changes in the process of enrollment, retention, and the learning process of the students. Everything must be 100% online and integrated with technologies that we weren't prepared for."*

*"It has driven us to think differently - as an academic portfolio that is coherent with market trends, our own DNA and capabilities."*

## IMPACT OF COVID IN HIGHER EDUCATION

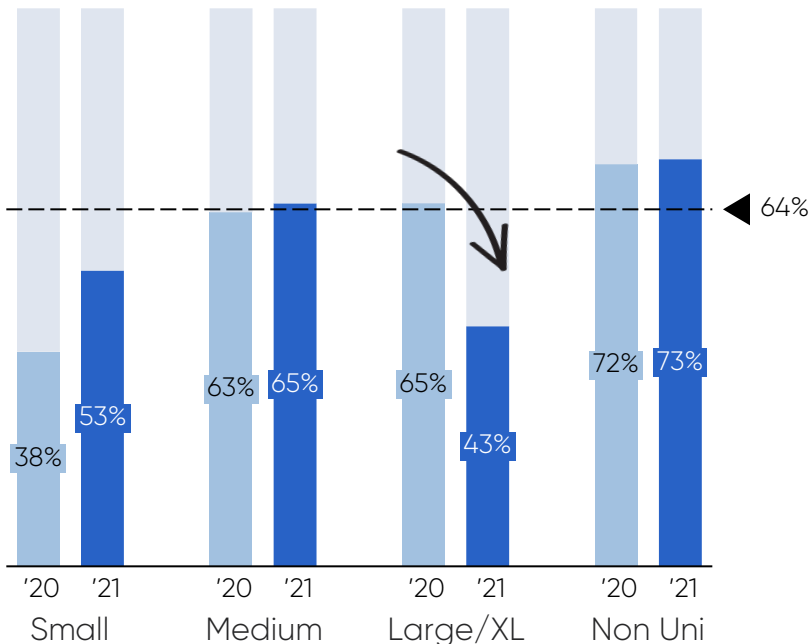


Question. Due to the impact of COVID, is your institution now...

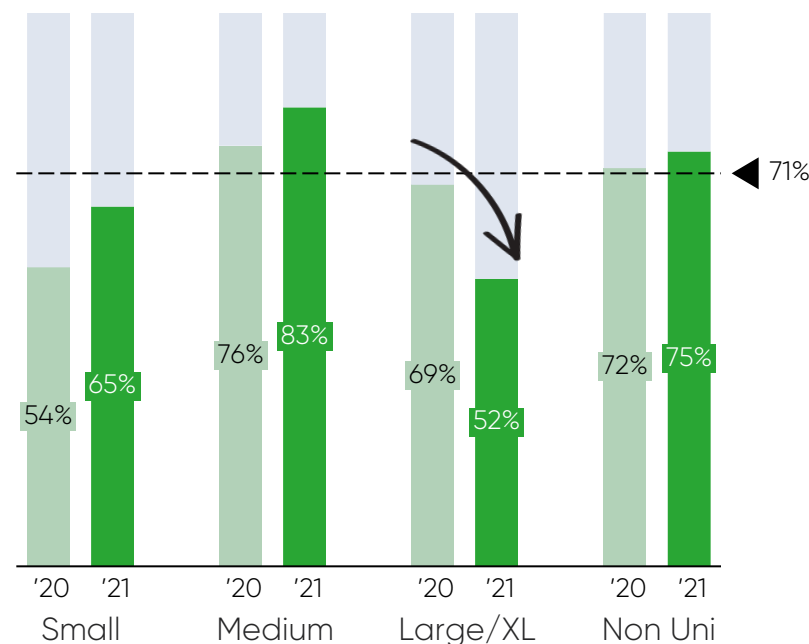
# Capability Gaps. Challenges in digital capability are diverse across stakeholder groups and institution size.

The greatest gap in digital capability is attributed to 'technology' for large universities. For small to medium universities, 'process' is the area of greatest need, followed by 'people'. Non-university stakeholders perceive that technology is less of an issue for universities compared to last year.

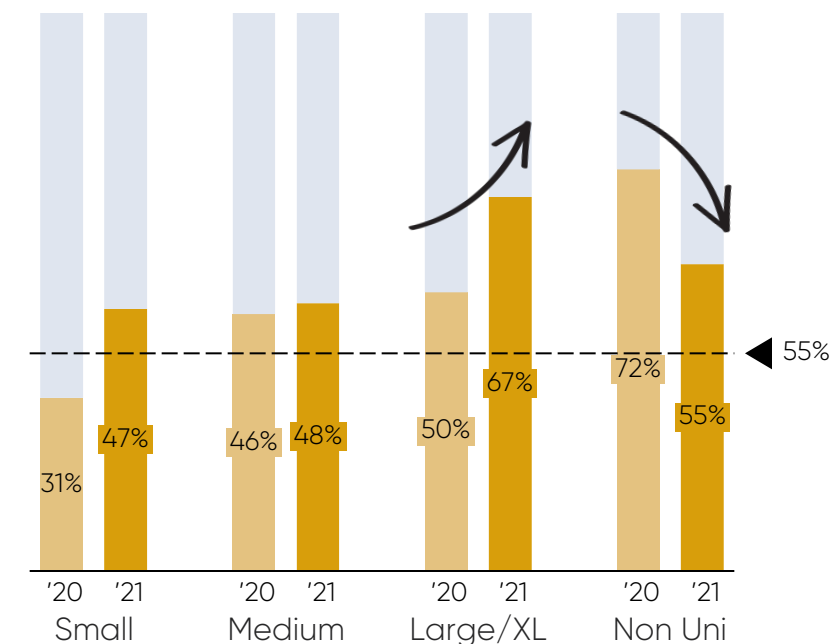
## PEOPLE



## PROCESS



## TECHNOLOGY



Question. Where do you see the current gaps in digital capability at your institution? (choose all that apply).

Digital performance and priorities unchanged since 2020. DD and LD highest performing; LD and LX high priorities.

### RANKING DIGITAL PERFORMANCE

- 1 Demand and Discovery**  
"We have a high level of digital maturity, the way we use all the information".
- 2 Learning Design**  
"Effort needs to be put into LD and seeing technology as a tool rather than a solution".
- 3 Work & Lifelong Learning**  
"We need to build partnerships that align with the productive industries".
- 4 Learner Experience**  
"How do we make both digital and f2f experiences positive for the student?"

### RANKING DIGITAL PRIORITIES

- 1 Learning Design**  
"We're doing well online, but now need to consider issues like artificial intelligence and adaptive teaching".
- 2 Learner Experience**  
"We have to continue maturing, to create interactions, relationships, experiments".
- 3 Demand and Discovery**  
"The recruiting process and attraction, conversion and retention strategies are key points that we are prioritizing."
- 4 Work & Lifelong Learning**  
"Degrees are not the only thing; there needs to be focus on skills and employability".



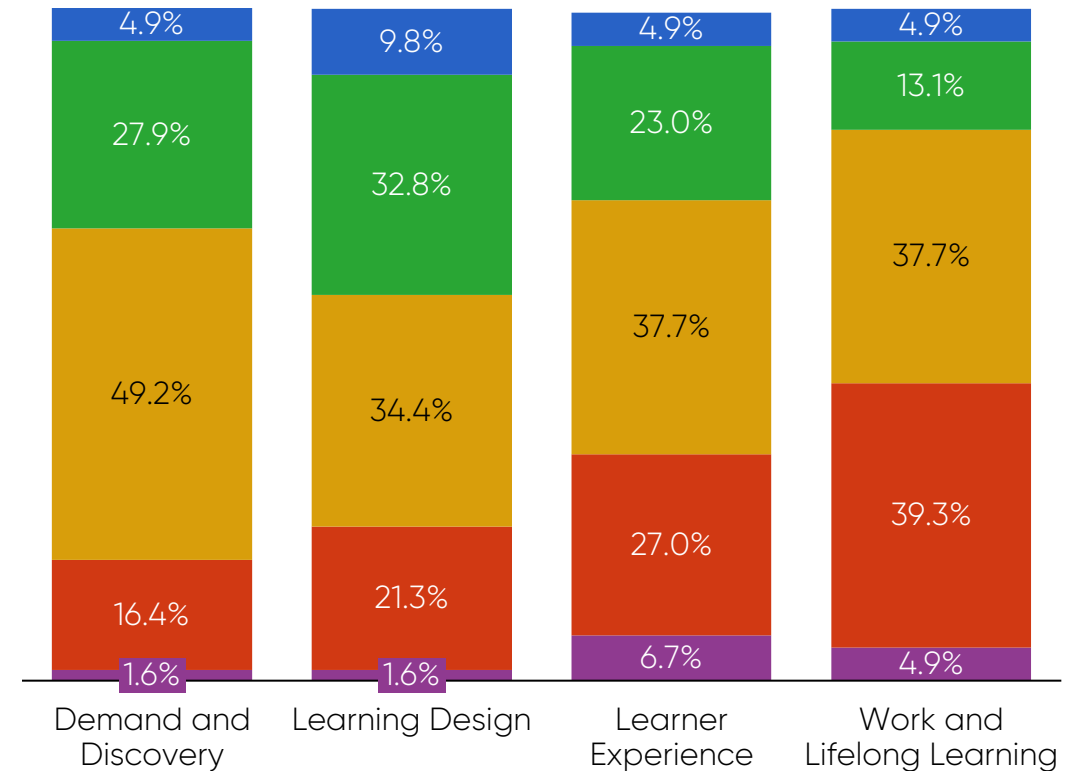
# Capability. Strong in Learning Design and Demand & Discovery, but gaps remain in all areas.

This year's survey indicated digital capability building across all Dimensions in the learner lifecycle, acknowledging that there is still much room for improvement.

Universities perceive their strongest area of digital capability in the area of Learning Design, with over 40% of respondents identifying as Strong or Excellent in this area. Universities also identify digital strength in the Demand & Discovery dimension.

*"Our educational model has an important component of online learning. Lots of technology - we believe in using it to improve service and coverage. We have made students more self-reflective - they go to find ways to solve problems".*

## UNIVERSITY DIGITAL CAPABILITIES - 2021

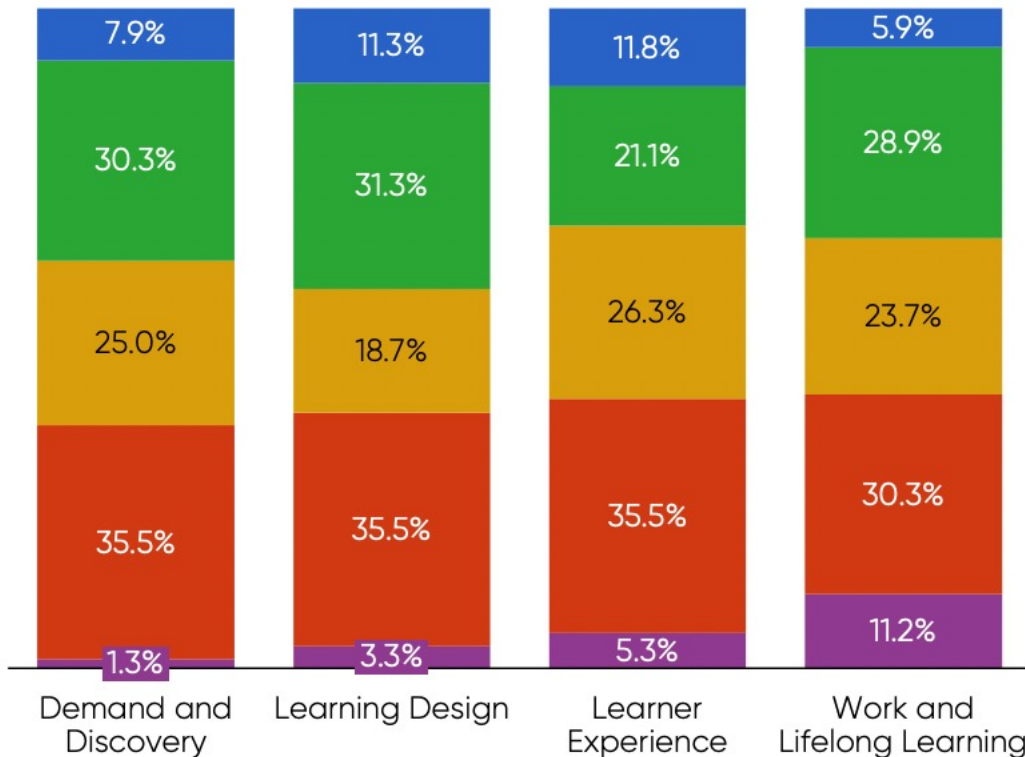


Question. How would you rate your institution's digital capabilities?

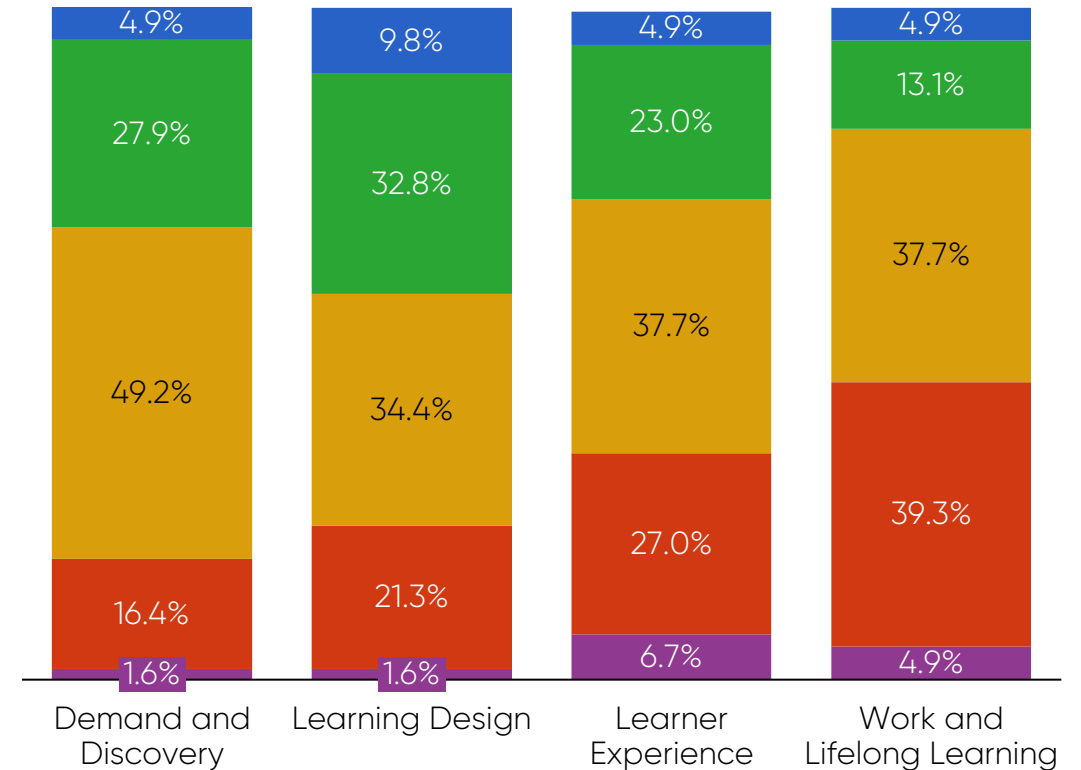
■ Excellent 
 ■ Strong 
 ■ Moderate 
 ■ Emerging 
 ■ Little or none

# Capability. Digital capabilities are improving, especially in early stages of the lifecycle.

**UNIVERSITY DIGITAL CAPABILITIES - 2020**



**UNIVERSITY DIGITAL CAPABILITIES - 2021**



■ Excellent 
 ■ Strong 
 ■ Moderate 
 ■ Emerging 
 ■ Little or none

Question. How would you rate your institution's digital capabilities?

# Priority. High to critical in Learning Design and Demand & Discovery.

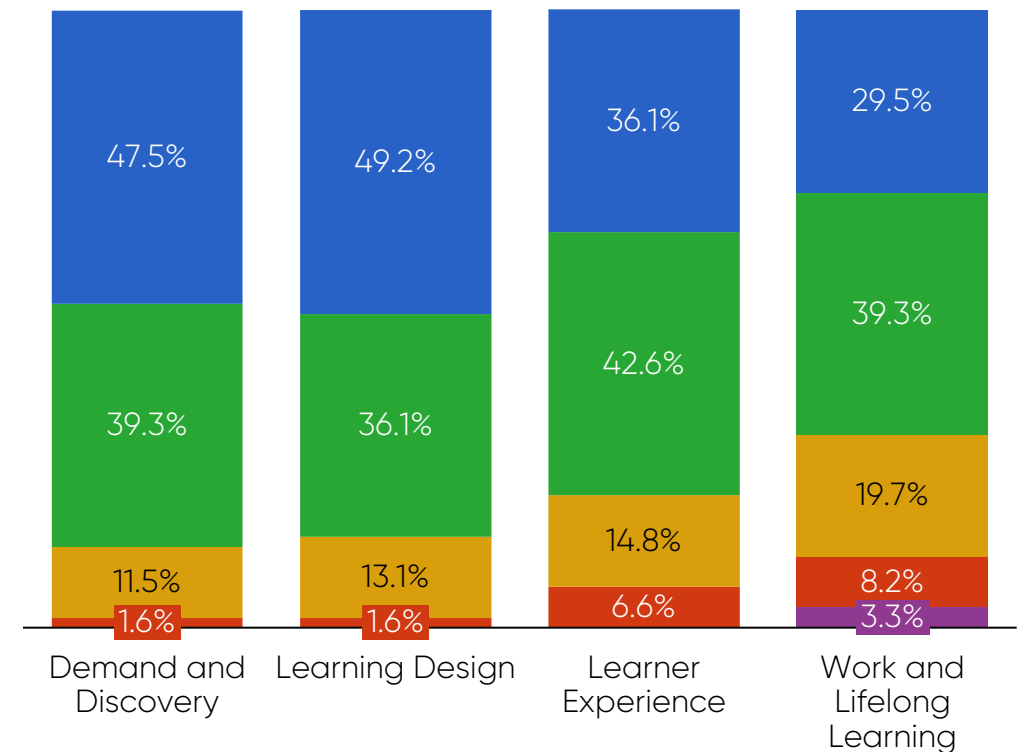
While all dimensions along the learner lifecycle are identified as important, Demand & Discovery and Learning Design have emerged as a priority for universities when it comes to digital, with ~ 80% of respondents identifying these areas of high or critical priority.

*"It's our focus, our business model. We are incorporating more add-ons or tools, with variety of resources that make learning enriching and keep the students engaged with the content as they accomplish their objectives".*

*"We are still thinking about the student's experience. We need to digitalize labs using AR, VR. Our concern is not remote learning, but efficient remote learning. There are tools to make this a mass model, but success will be in natural interaction".*

■ Critical
 ■ High Priority
 ■ Medium Priority
 ■ Low Priority
 ■ Not a Priority

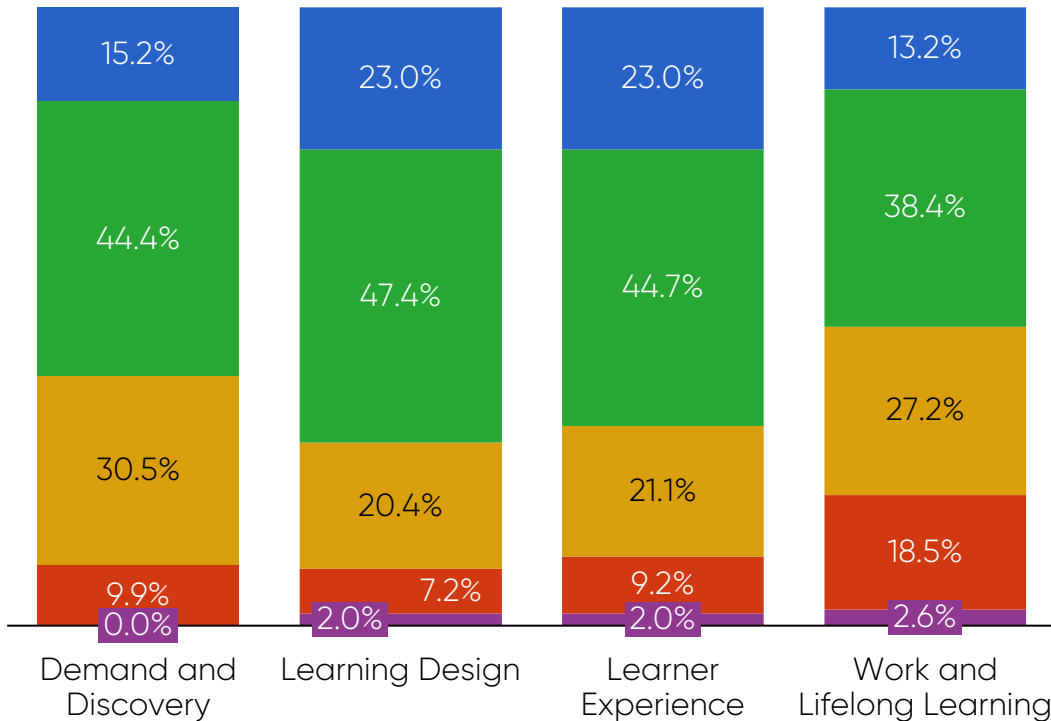
## DIGITAL PRIORITY ACROSS THE LEARNER LIFECYCLE - 2021



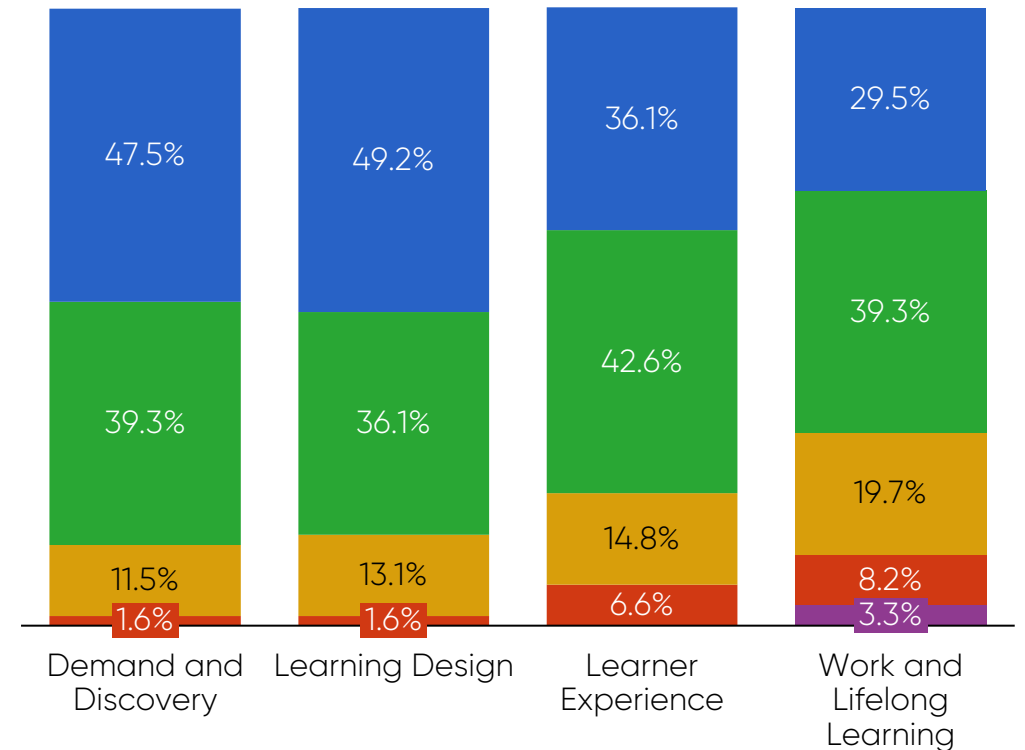
Question. How important are digital capabilities in [...] for your institution.

# Priority. Increasing priority across all capabilities, but especially those earlier in the learner lifecycle.

**UNIVERSITY DIGITAL PRIORITIES - 2020**



**UNIVERSITY DIGITAL PRIORITIES - 2021**



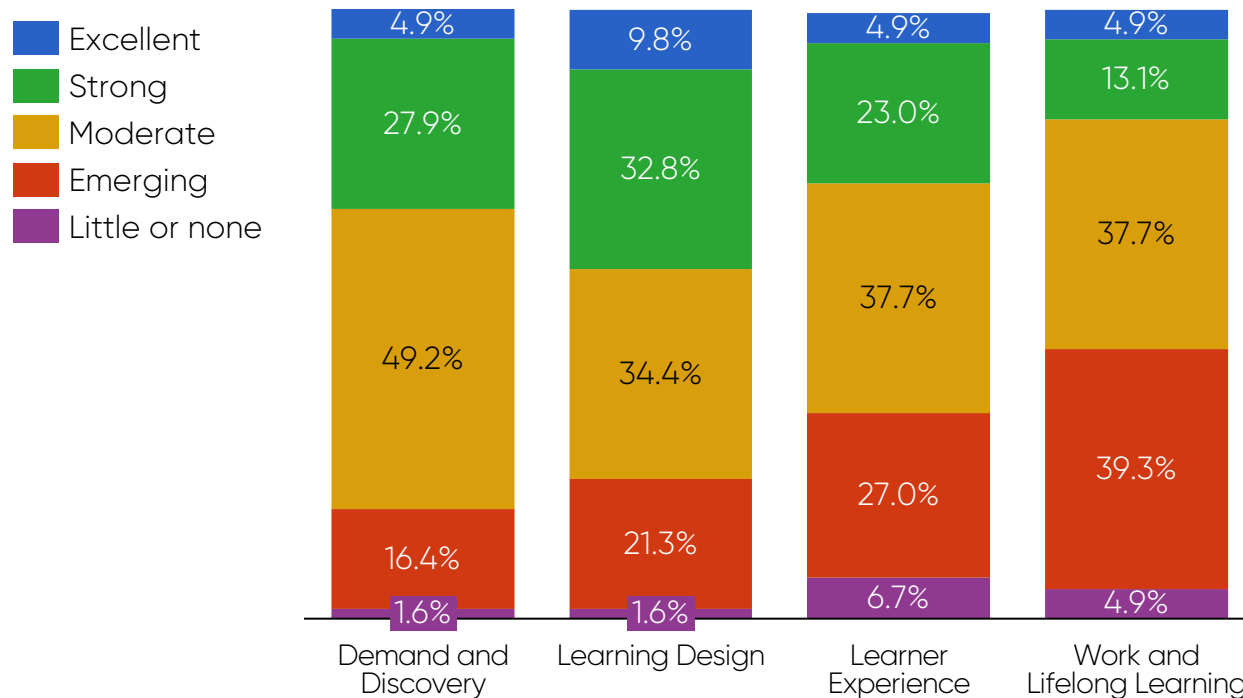
■ Critical 
 ■ High Priority 
 ■ Medium Priority 
 ■ Low Priority 
 ■ Not a Priority

Question. How important are digital capabilities in [...] for your institution.



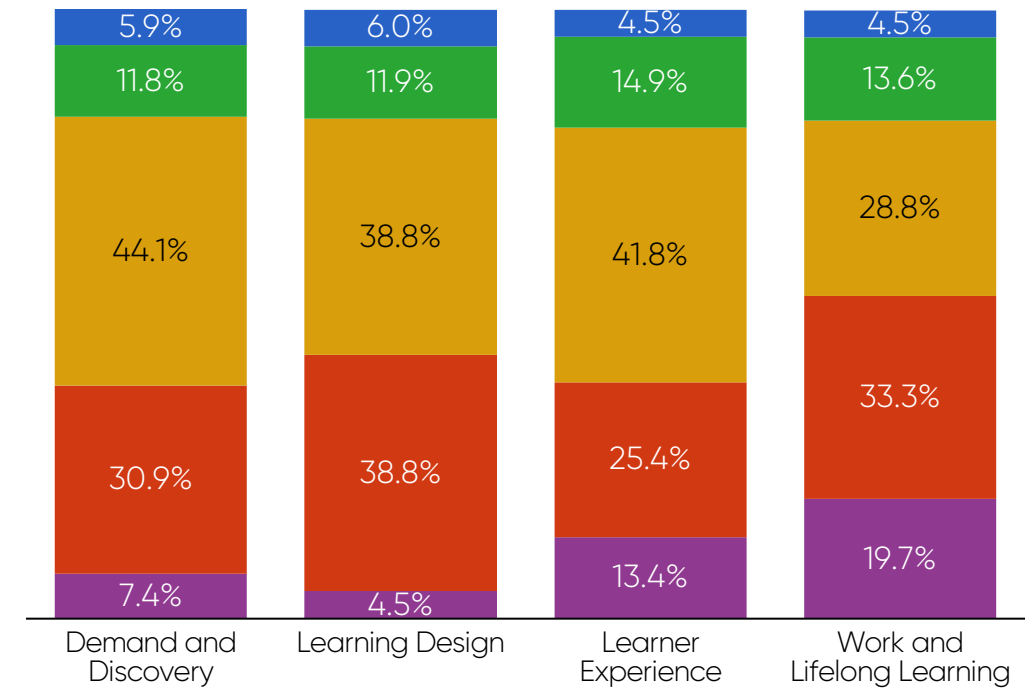
# Capability. Universities rate their digital capabilities more highly than non-university stakeholders.

## HIGHER EDUCATION CAPABILITY LEVEL UNIVERSITY PERSPECTIVE



Question. How would you rate your institution's digital capabilities in the [...] dimension.

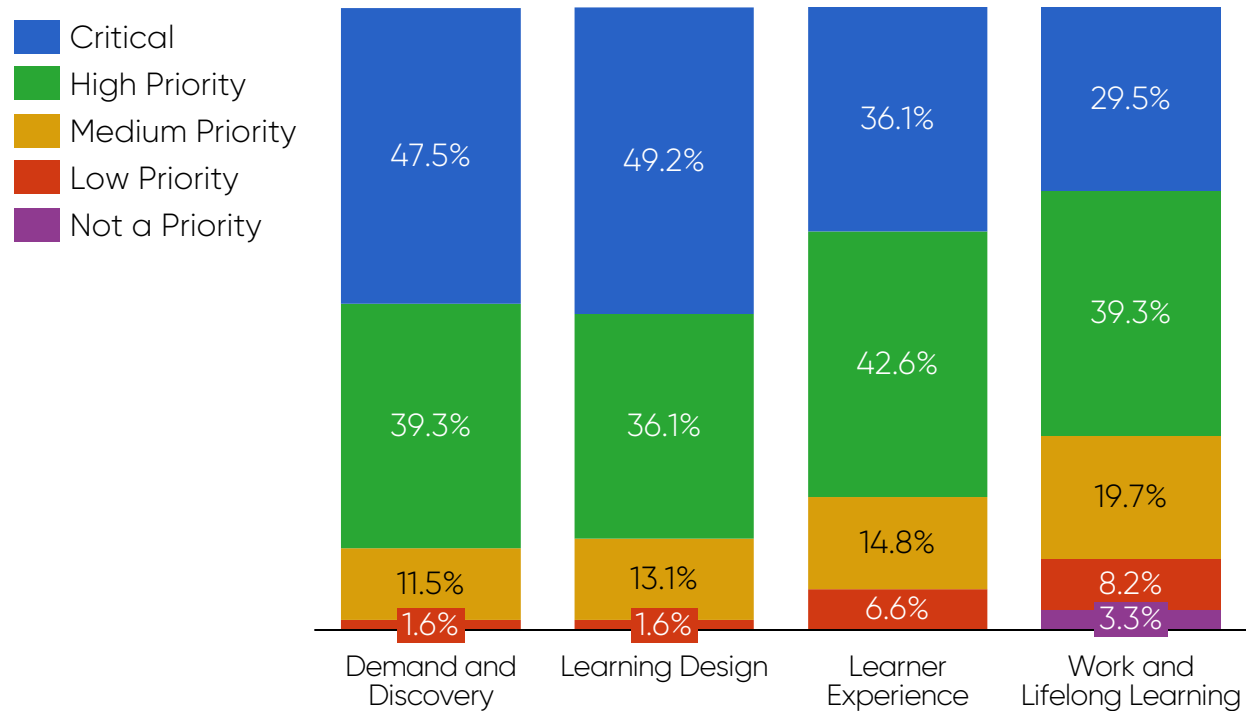
## HIGHER EDUCATION CAPABILITY LEVEL NON-UNIVERSITY PERSPECTIVE



Question. How would you rate digital capabilities at Higher Education institutions in the [...] dimension.

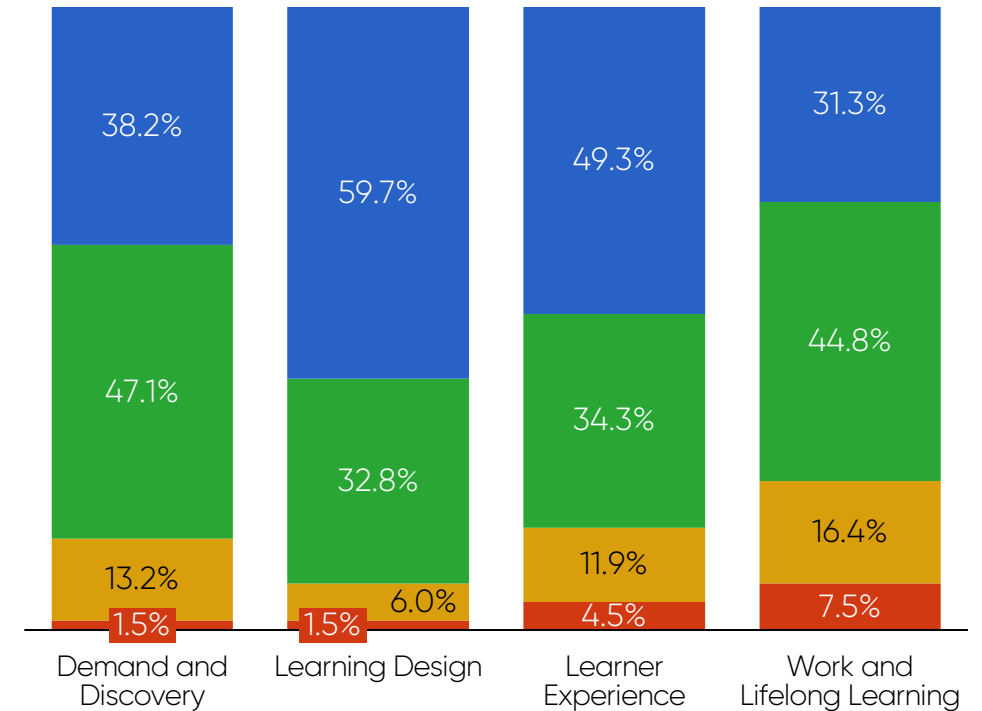
# Priority. Non-university and university stakeholders are broadly aligned; most capabilities are high priority/critical.

**HIGHER EDUCATION DIGITAL PRIORITIES  
UNIVERSITY PERSPECTIVE**



Question. How important are digital capabilities in the [...] dimension for your institution?

**HIGHER EDUCATION DIGITAL PRIORITIES  
NON-UNIVERSITY PERSPECTIVE**



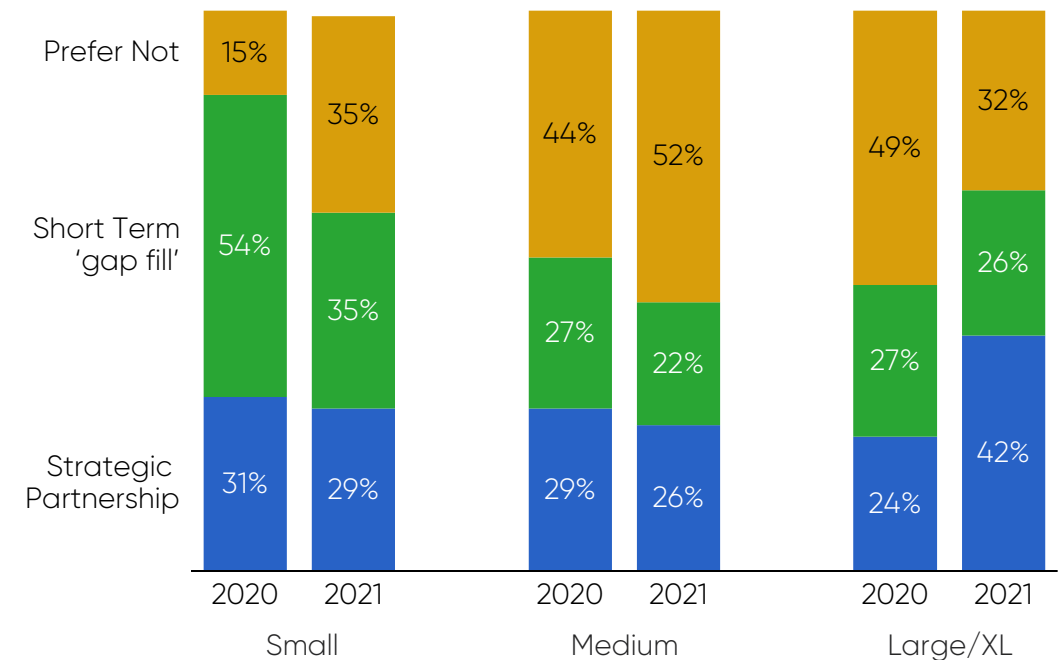
Question. How important are digital capabilities in the [...] dimension for Higher Education institutions?

# Nearly 1 in 3 Universities seek strategic partnerships to deliver digital capability. Larger universities are moving toward outsourcing digital capabilities.

Consistent with findings from 2020, a third of university respondents indicate that their institution takes a 'strategic partnership approach' to outsourcing digital capability, while 22% to 35% use such arrangements as a short term 'gap fill' until they can build their own capability set.

Larger universities have shifted toward a preference for outsourcing compared with the 2020 survey. This aligns with a significant increase in university partnerships during 2021, with nearly 600 new University Partnerships established around the world.

## APPROACH TO OUTSOURCING DIGITAL CAPABILITY, BY INSTITUTION SIZE



Question. Which of the following choices best describes your institution's overall approach to outsourcing digital capability?

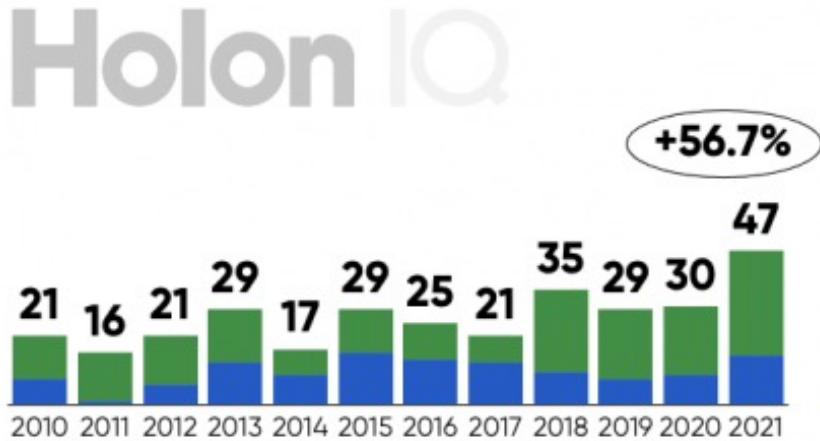
# 594 Universities established an OPM, Bootcamp or Pathways partnership in 2021 to accelerate their institutional objectives.

Number of new academic partnerships established by Global Universities each year. (2010 –2021).  
The three categories below are mutually exclusive

## International Student Pathway Partnerships

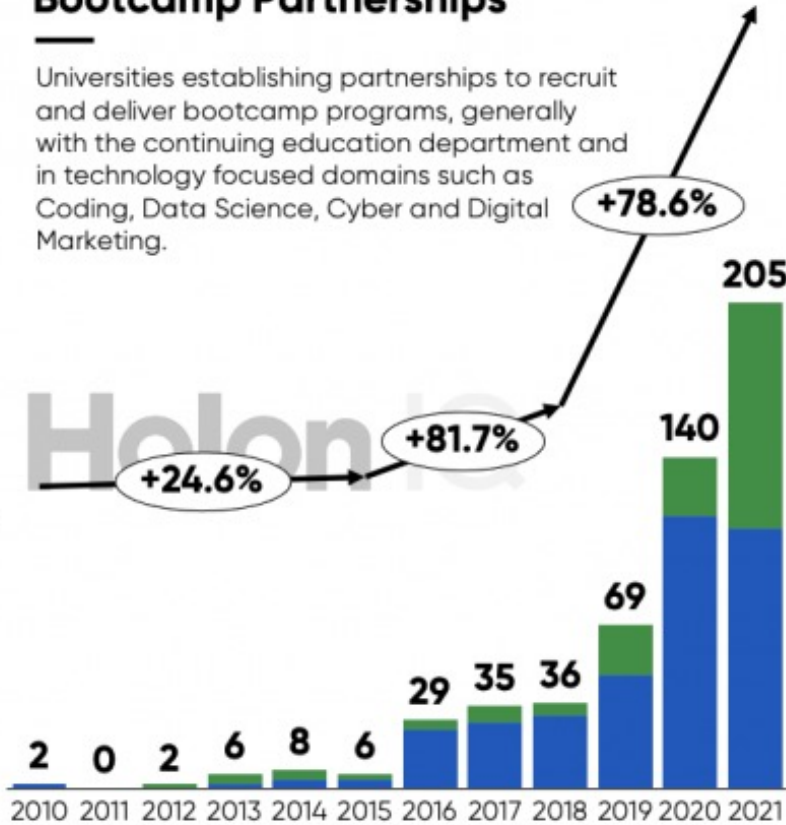
Universities establishing partnerships to recruit and deliver almost exclusively degree programs for International Students. Focused on campus-based programs however high levels of digital remote delivery through COVID.

US Universities  
International Universities



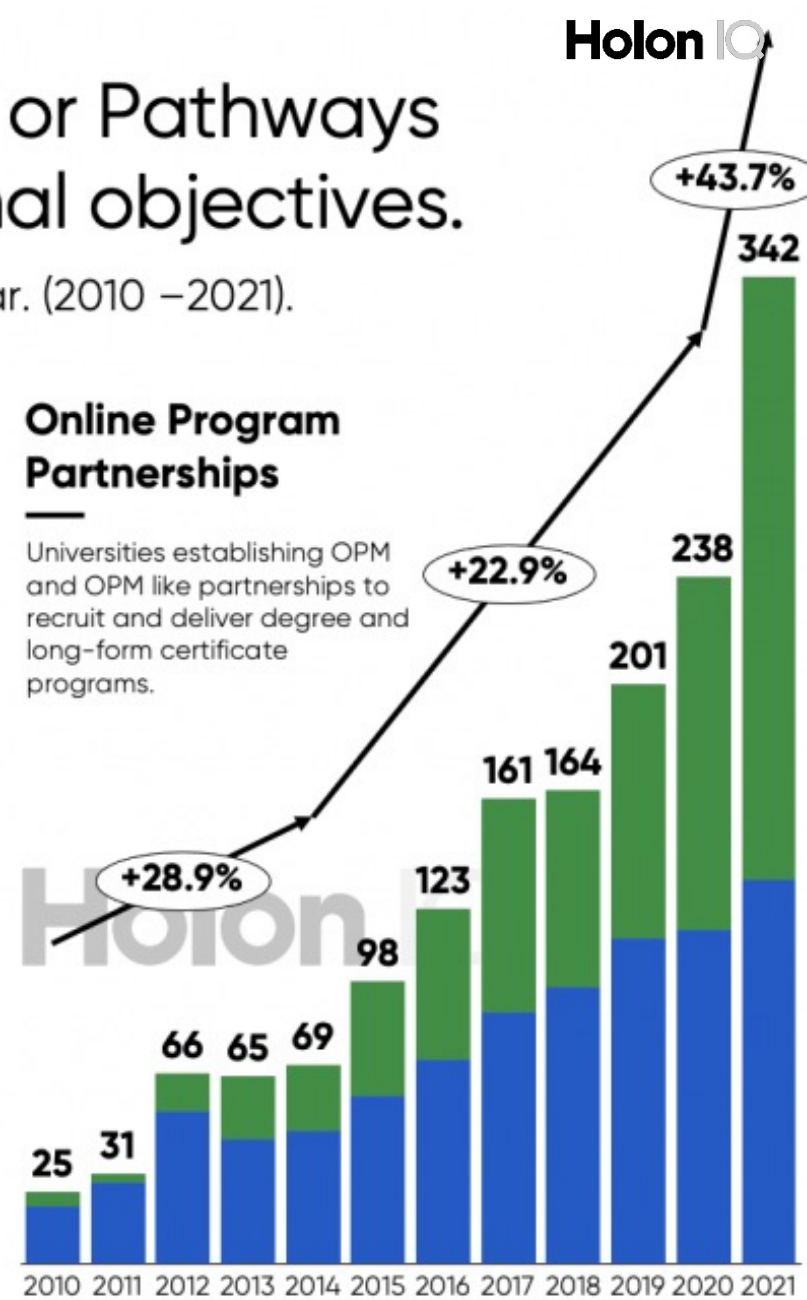
## Bootcamp Partnerships

Universities establishing partnerships to recruit and deliver bootcamp programs, generally with the continuing education department and in technology focused domains such as Coding, Data Science, Cyber and Digital Marketing.



## Online Program Partnerships

Universities establishing OPM and OPM like partnerships to recruit and deliver degree and long-form certificate programs.



# Respondent Profile

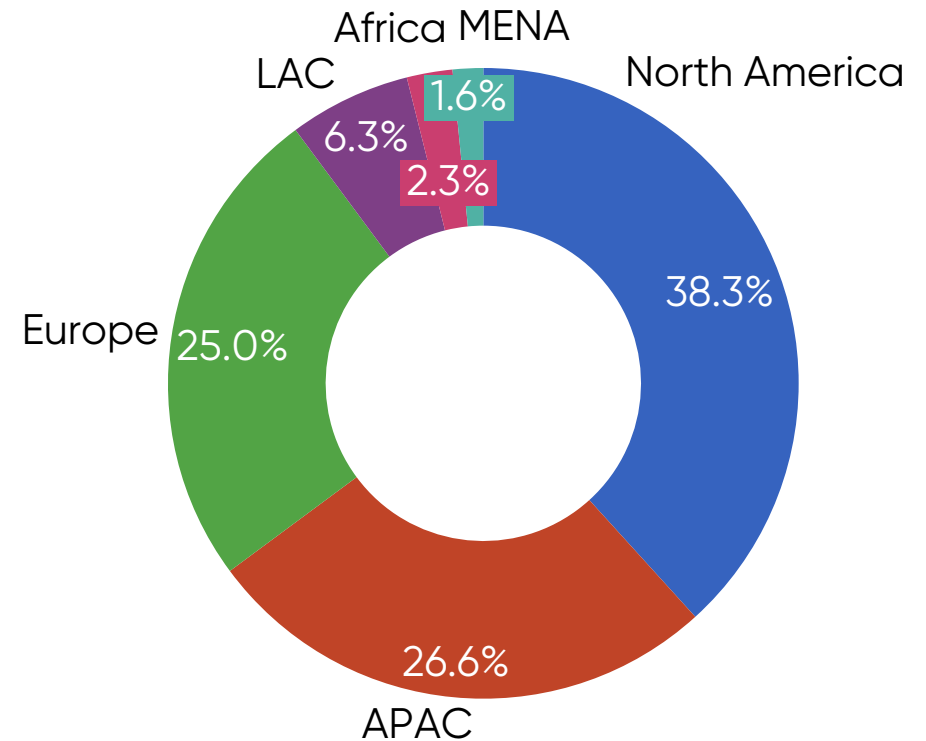
# Global Higher Education Network

The HolonIQ Higher Education Network is a global cohort driving a cross-sectional study into digital capability in Higher Education and includes perspectives from a diverse mix of stakeholders across more than 80 countries around the world.

The Network consists of 3,800+ leaders and professionals working within institutions of Higher Education, along with organizations that service and support higher education, including EdTech companies, government, investors and professional services.

[holoniq.com/global-higher-education-network](https://holoniq.com/global-higher-education-network)

## SURVEY RESPONSES – GEOGRAPHIC DISTRIBUTION

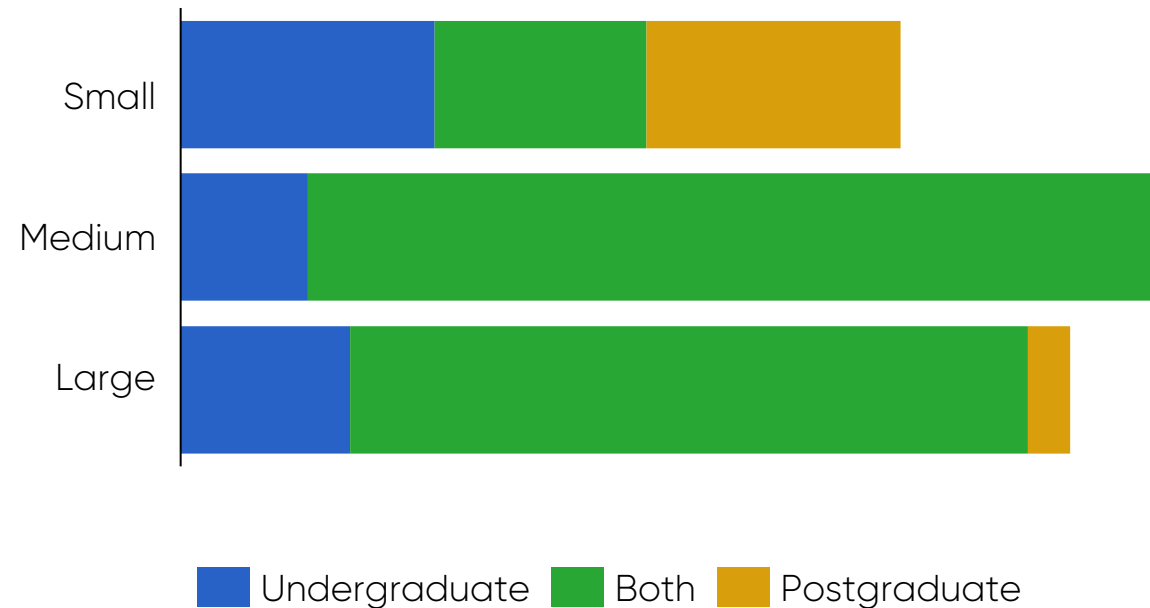


# University Respondents - Size & Program Profile.

The majority of respondent institutions offer both undergraduate and postgraduate programs, with a small number of graduate schools participating and almost one third of respondents from institutions that offer only undergraduate degrees.

Distribution of university respondents is fairly even with roughly one third each from the Small (under 5000 enrolments), Medium (5,000-20,000 enrolments), and Large/XL (over 20,000 enrolments) categories. A similar distribution was observed in the previous year's research respondents.

**UNIVERSITY RESPONDENT SIZE (ENROLMENTS) AND MAIN LEVEL OF FOCUS**

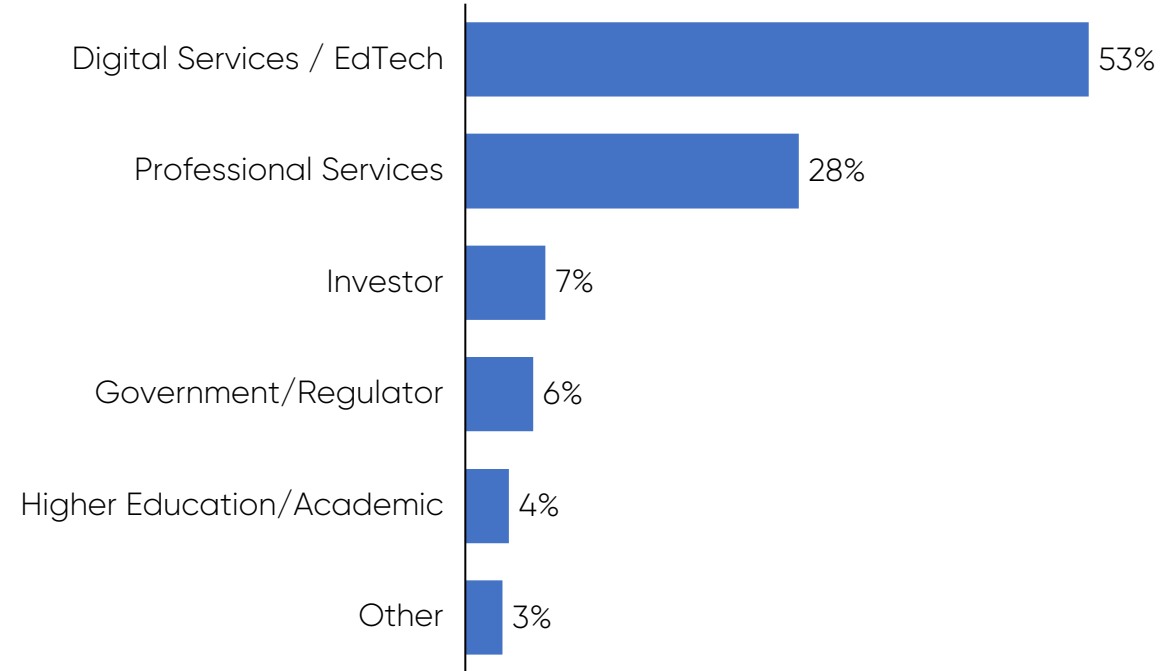


# Non-University Respondents - Segment, Size & Digital Maturity.

Digital Services and EdTech companies represent over half of respondents from the non-university group followed by Professional Services (28%) and Investors (7%).

Just over a third of these respondents are from small organizations, with revenue under \$5M and 50 or less staff. Perhaps not surprisingly this set of respondents self-assessed digital maturity of their organisation relatively highly.

## NON-UNIVERSITY RESPONDENT COMPOSITION



Question. What role best describes your organization in relation to digital capability in Higher Education?



# DD. Demand & Discovery

# Demand & Discovery (DD)

This dimension brings together digital capabilities which impact institutional strategy and early stages in the learner lifecycle, connecting marketing processes, student recruitment and enrollment management.

New models and competitors are challenging established programs, and successful institutions draw on deep and complex data sets to understand and respond to the changing needs of learners, partners and markets.

Data now connects every stage in the student journey, enabling the creation of personalised communications across an array of channels and partners. Prospective learners are diverse and fragmented, requiring sophisticated tools and organisational capabilities to profile, segment, qualify and convert leads.

The demands on user experience (UX) continue to rise; recruitment and enrolment processes are expected to provide consistent, responsive and tailored digital experiences across every touchpoint.



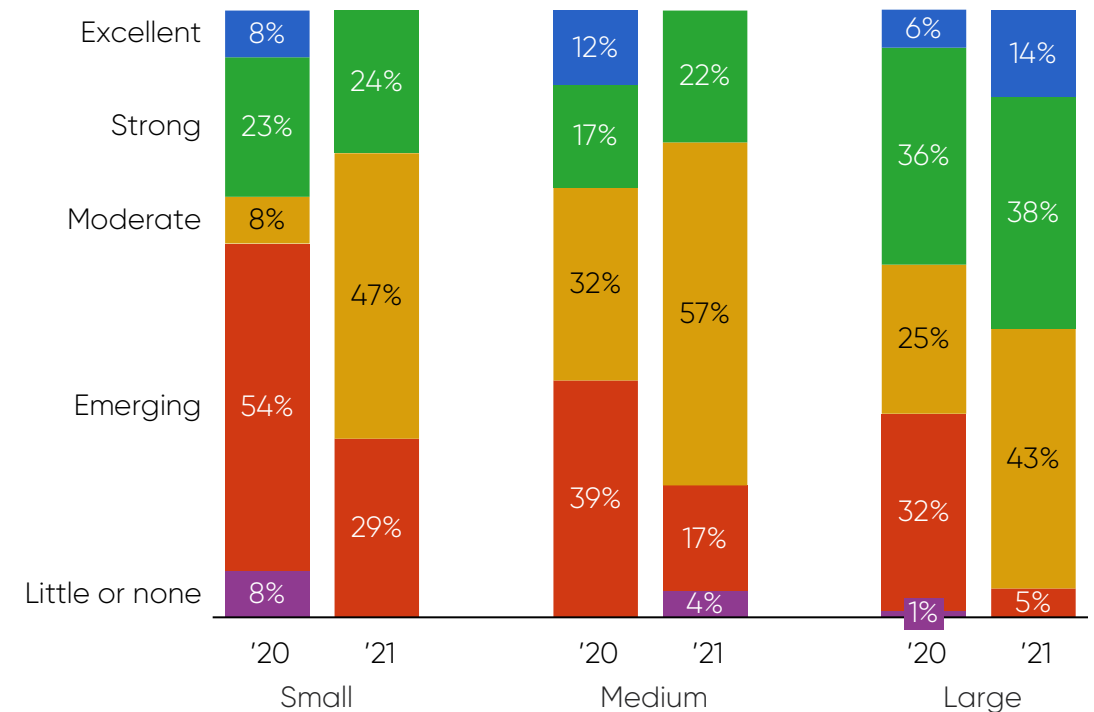
# Demand & Discovery. Increasing confidence in digital capabilities across all institution sizes.

Digital capability in Demand and Discovery has shifted positively since 2020, with increasing confidence across all institution sizes, but especially among smaller institutions.

Larger institutions overall rate themselves with higher levels of capability in this Dimension, with ratings of 'excellent' more than doubling since 2020.

*"When you approach a new market it is always a great challenge and a great opportunity... We do more than just selling, we provide quality service to students".*

## CAPABILITY LEVEL OF DEMAND AND DISCOVERY BY UNIVERSITY SIZE



Question. How would you rate your institution's digital capabilities in the Demand and Discovery dimension?

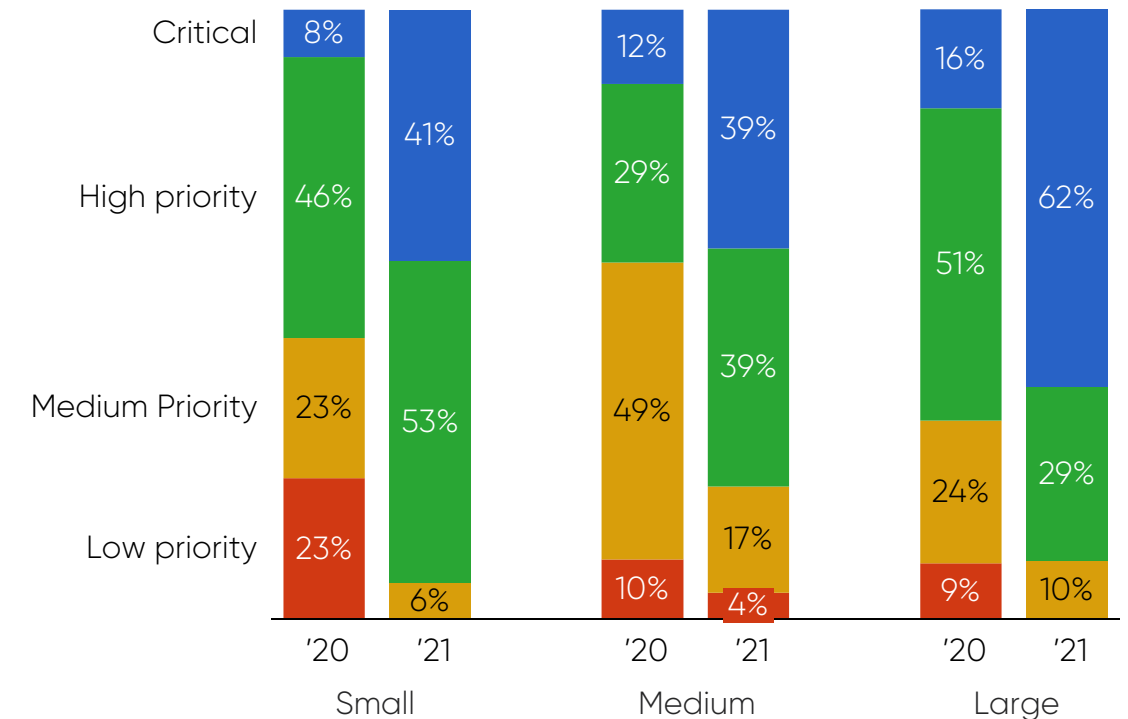
# Demand & Discovery. Digital capabilities becoming a 'critical' priority here, especially for larger institutions.

Compared with the previous year, more institutions identify the Demand and Discovery dimension as being of critical priority in the development of their digital capabilities. Larger institutions are more focused on this dimension with 62% indicating that it is a critical priority.

Smaller institutions have also notably increased their focus on Demand and Discovery, with 94% rating it 'high' or 'critical' (vs. 54% last year).

*"We are betting on digital transformation through collaboration - different partnerships with other elements of the digital ecosystem to strengthen our product and generate accessibility opportunities".*

## IMPORTANCE OF DEMAND AND DISCOVERY CAPABILITY BY UNIVERSITY SIZE



Question. How important are digital capabilities in Demand & Discovery for your institution?

# LD. Learning Design

# Learning Design (LD)

Digital capabilities in Learning Design combine evidence-based understanding of learner needs and learning processes with emerging skill sets in user experience design (UX), instructional strategies, content and mixed media design.

Successful institutions are designing programs and courses to suit new learning environments, delivery modes and learning approaches. Diverse types of digital content are created, licenced and managed to support learning, responding in particular to the need for immersive learning and simulation in STEM subjects.

Emerging disciplines are also demanding new subject matter expertise, which must be sourced, managed and updated to keep pace with changing industries and knowledge.

Instructional strategies draw on an increasing range of digital capabilities to provide active and adaptive learning experiences for students to learn in different ways, both as individuals and as members of class groups and communities.



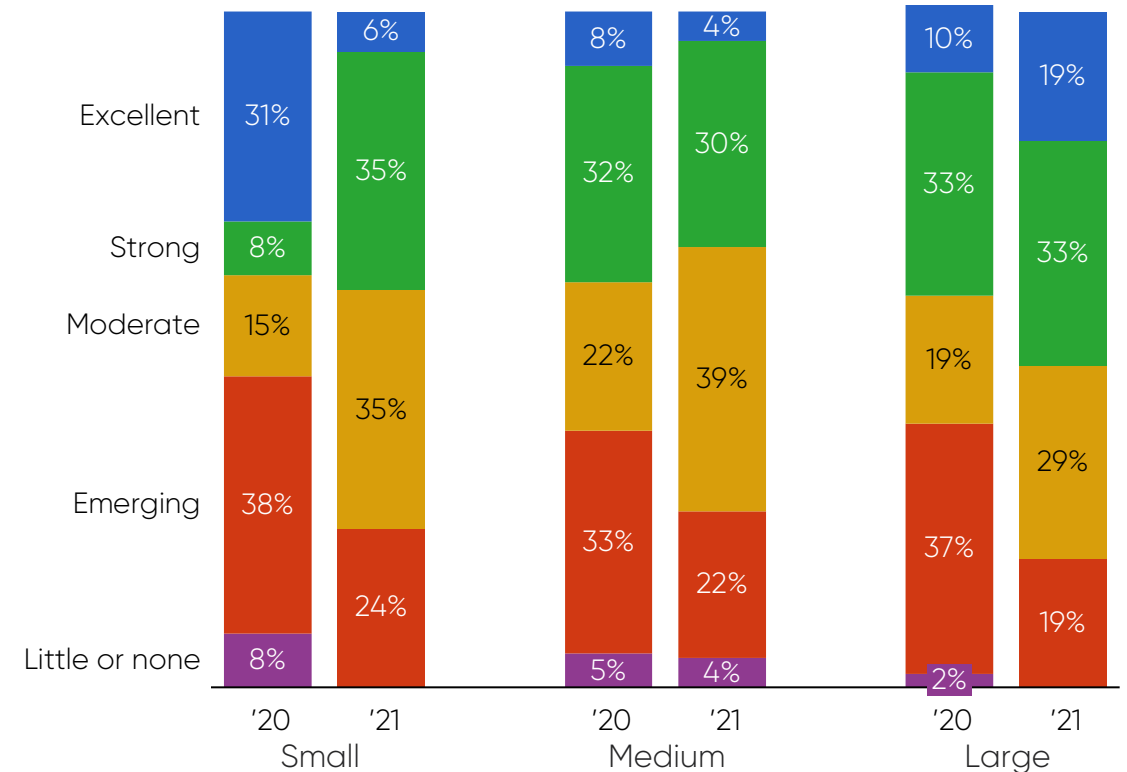
# Learning Design. Traditionally an area of strength, digital capabilities in LD still a key focus for growth.

Compared with other dimensions, digital capabilities on the Learning Design dimension are perceived as an area of strength, with approximately one third of institutions identifying strong to excellent capabilities in this domain. All institution sizes report increased capability from the previous year's results.

Learning Design is also one of the highest priority areas for universities when it comes to digital capabilities, along with Learner Experience.

*"...we must reinvent and understand the new educational scenario, adapting products and services"*

**CAPABILITY LEVEL OF LEARNING DESIGN BY UNIVERSITY SIZE**



Question. How would you rate your institution's digital capabilities in the Learning Design dimension?

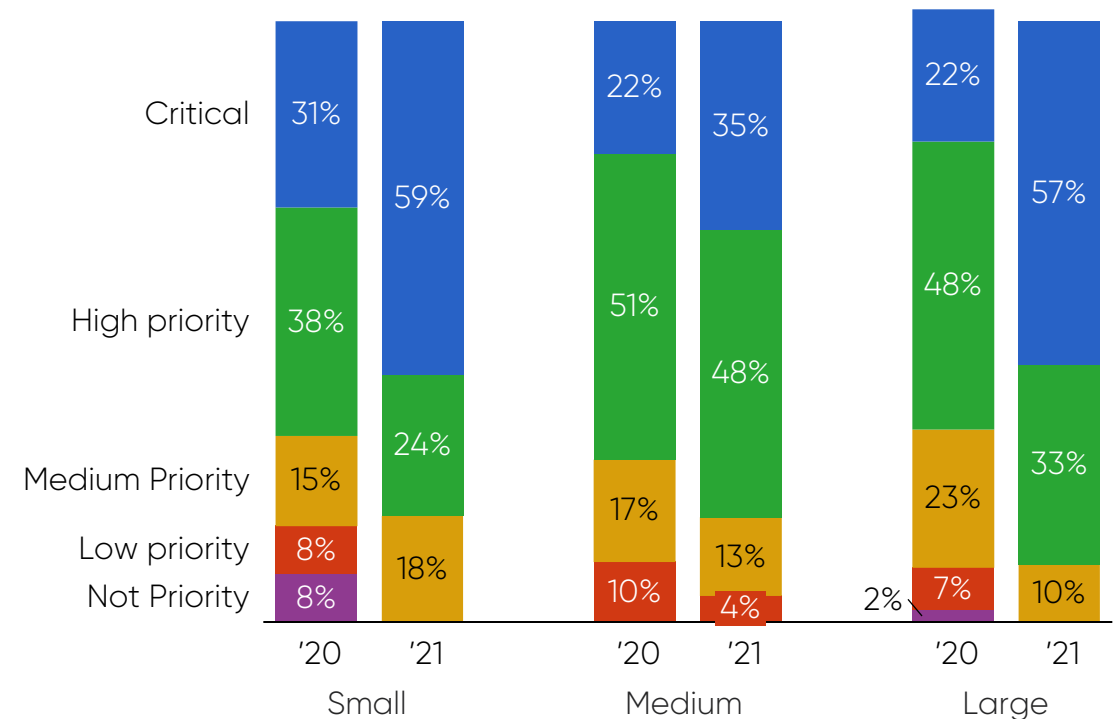
# Learning Design. Digital capabilities in this area are considered critical by institutions of all sizes.

Overall, approximately half of university respondents marked the Learning Design Dimension as of 'critical' priority. When compared by institution size, small institutions rate digital capability in Learning Design most critical, but institutions of all sizes recognize the importance of digital skills in the design of their primary 'product' given the impact on students and their learning.

Again, priorities are ramping up compared to 2020 responses – across the board, Learning Design is perceived to be a higher priority than it was a year ago.

*"Learning is everywhere. The learning process no longer belongs only to educational institutions. We cannot fail to consider this transformation, but always remember the most important thing, which is the educational institution's curative role, providing access to education".*

## IMPORTANCE OF LEARNING DESIGN CAPABILITY BY UNIVERSITY SIZE



Question. How important are digital capabilities in Learning Design for your institution?



# LX. Learner Experience

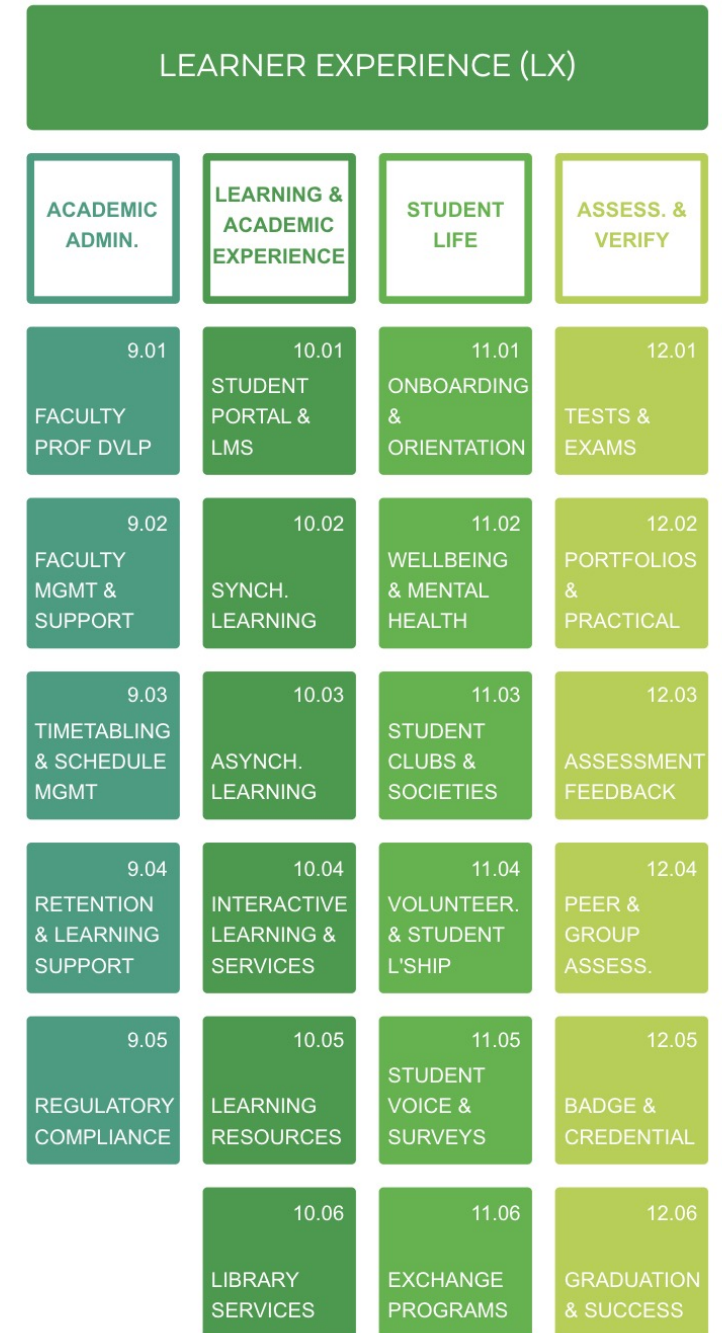
# Learner Experience (LX)

At the heart of the learner lifecycle is a broad set of digital capabilities supporting student life, community and wellbeing as well as learning processes, academic progress and assessment.

Within Learner Experience, improved digital capabilities are bringing efficiency and relief to burdensome academic administration processes such as timetabling, compliance and reporting. As learning design and delivery changes, faculty professional development remains as important as ever.

Students are able to take more control over their learning journey with improved digital learning environments and a single view of their priorities and progress, tailored to their needs. Where students are geographically distant, digital solutions can help them to create and engage in social groups and communities, and seek out the support they need, when they need it.

Digital assessment and verification capabilities are evolving, with vast improvements showing the potential for assessments, portfolios and exams to be conducted fairly and securely online. Graduations and celebrations can now take place in digital formats for those who can't attend in person, with digital credential options embedded throughout the student journey.



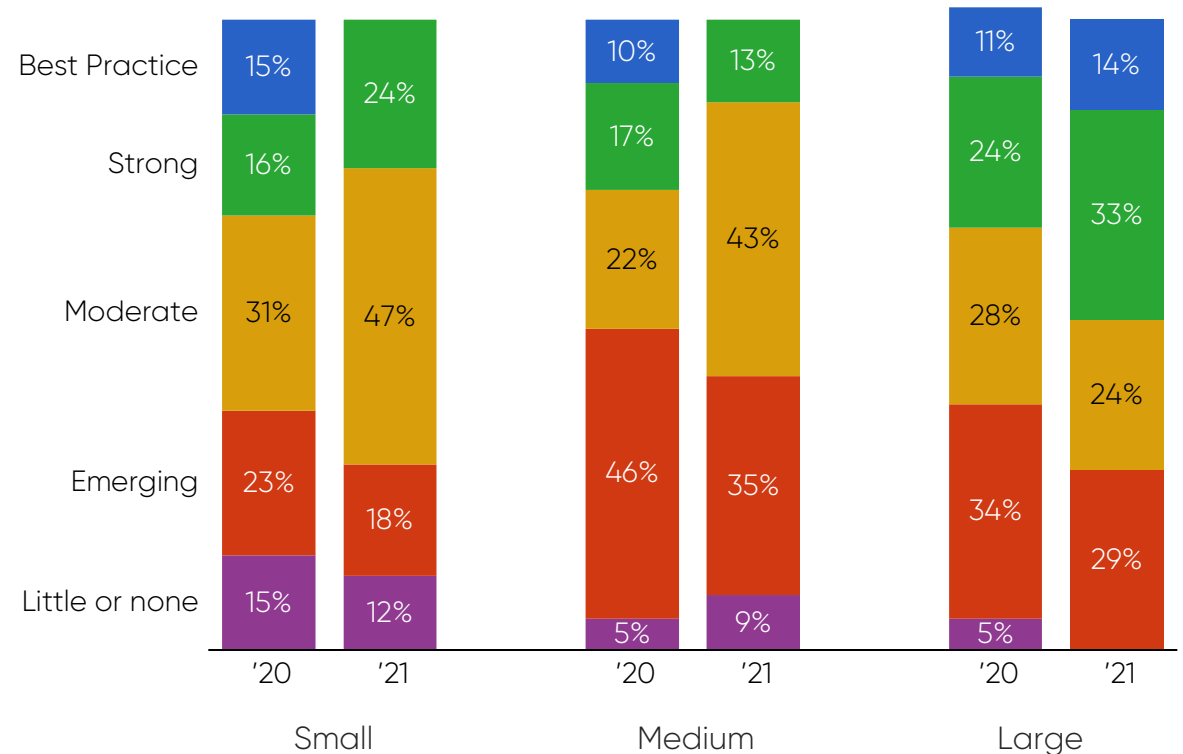
# Learner Experience. Institutions identify LX as (still) the area of greatest need to build digital capabilities.

Institutions of all sizes have identified digital capabilities in the domain of Learner Experience as an area to build digital capability. Between one third and one half of institutions assess their current capability as low/emerging.

The sustained focus on students and learner experience through COVID has arguably set the bar higher than ever in this Dimension. This now requires a broad set of digital capabilities to come together to deliver an integrated digital experience for students. Whilst there has been progress, this remains a significant challenge for many institutions.

*"Students express that their experience is being diminished when it's online. What we don't know is how is this going to evolve - we don't know if this is going to turn around. We suspect we will continue growing online, but we don't know what is going to happen with on-site education".*

**CAPABILITY LEVEL OF LEARNER EXPERIENCE BY UNIVERSITY SIZE**



Question. How would you rate your institution's digital capabilities in the Learner Experience dimension?

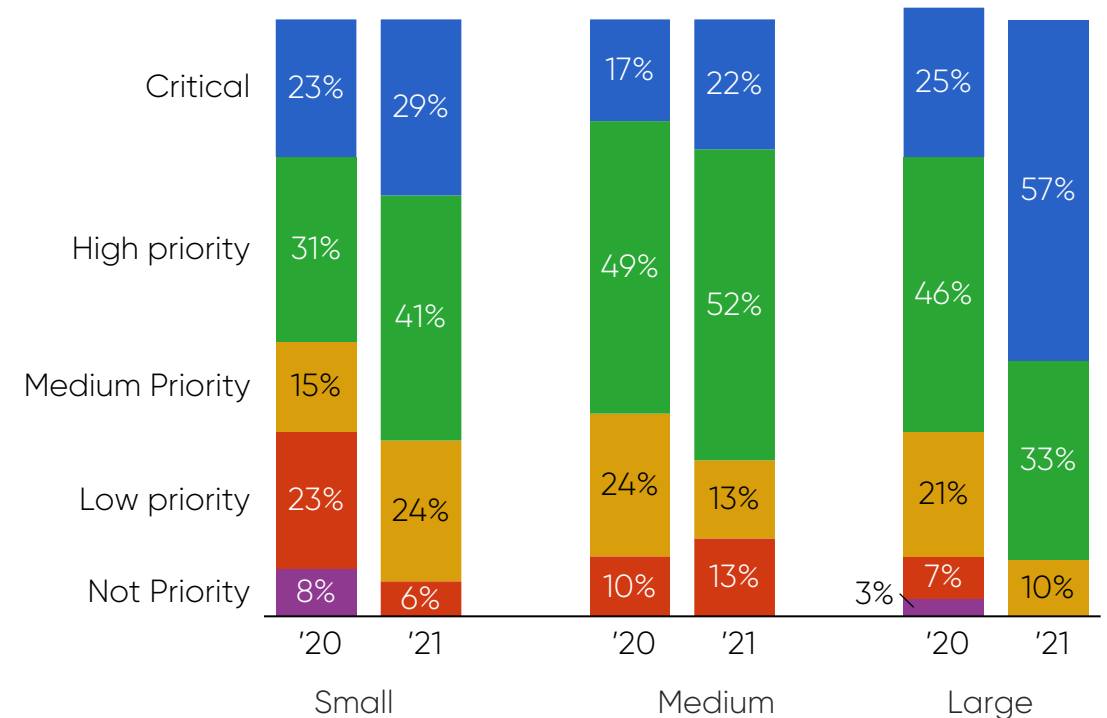
# Learner Experience. A year on, the gap remains between digital capability (low) and priority (high).

The Learner Experience is where it all comes together in terms of digital capability, from infrastructure, to student-facing systems, digital content, data integration and digital skills of academic staff.

Institutions of all sizes recognise the need to ensure a high-quality learner experience to achieve educational outcomes. It is also the area where there is the largest gap between priority and current digital capability, suggesting institutions will continue to focus attention and resources on this area.

*"The student is the main driver - although we have realized there is a need for in-person, there are positive factors for digital. 70% of our students are women thanks to the virtual models. Our enrollment numbers are growing, with virtual ability we have been able to graduate those who weren't before".*

## IMPORTANCE OF LEARNER EXPERIENCE CAPABILITY BY UNIVERSITY SIZE



Question. How important are digital capabilities in Learner Experience for your institution?

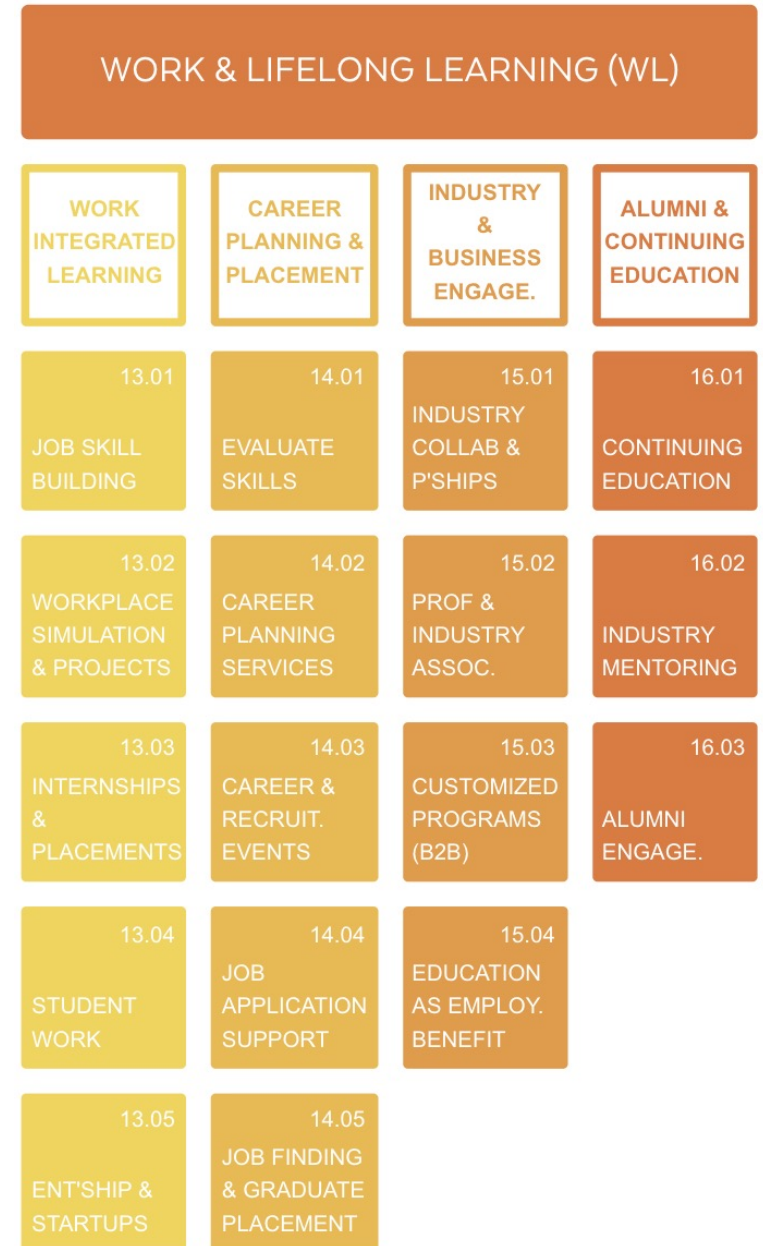
# WL. Work & Lifelong Learning

# Work & Lifelong Learning (WL)

Traditionally thought of as the 'final' stage in the learner lifecycle, the focus has been shifting for some time to consider how learners can be supported as they choose and change careers throughout their lives, underpinned by ongoing learning and skill development.

Work-Integrated Learning remains a key focus, with digital capabilities enabling virtual internships and remote mentoring with industry professionals. Career planning and placement services are making use of AI and machine learning for skills assessment and matching, whilst jobs fairs and events explore virtual possibilities.

Technology also supports networks and partnerships with industry, connecting learners and professionals and facilitating access to industry expertise. Finally, alumni engagement is thriving in the digital age, as institutions future-proof their roles as education providers by supporting learners at many different points in their lives.



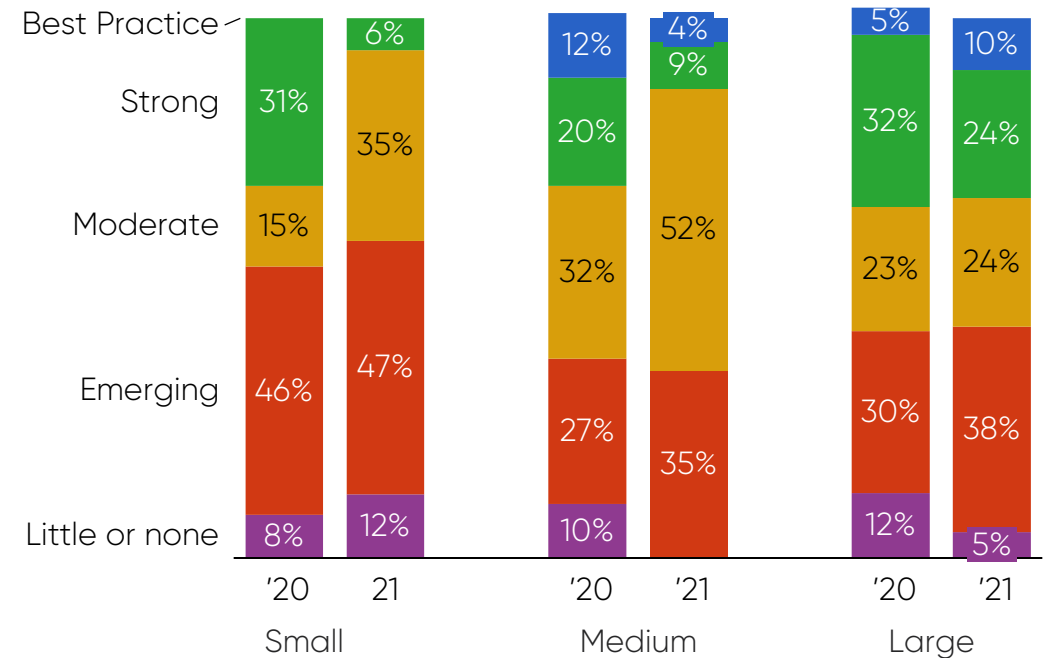
# Work & Lifelong Learning. Most institutions identify emerging or moderate digital capabilities in this domain.

A little over one third of institutions rate their digital capability in Work & Lifelong Learning as 'Emerging', reflecting many institutions that, prior to COVID, delivered all or most of their programs on campus, and likely also offered in-person solutions to mentoring, internships, job placement and career counselling activities.

Compared with other dimensions across the learner lifecycle, the 'uplift' in capability here is much more modest. Going forward, auxiliary services such as career counselling and placement will likely need to build a digital set of solutions to service student needs and expectations.

*"We are focusing more on job placement and partnerships with companies. This is a model we have to continue evolving to make sure it is actually efficient and we can keep offering quality. We have to continue offering quality based on research, and public and private partnerships".*

## CAPABILITY LEVEL OF WORK & LIFELONG LEARNING BY UNIVERSITY SIZE



Question. How would you rate your institution's digital capabilities in the Work & Lifelong Learning dimension?

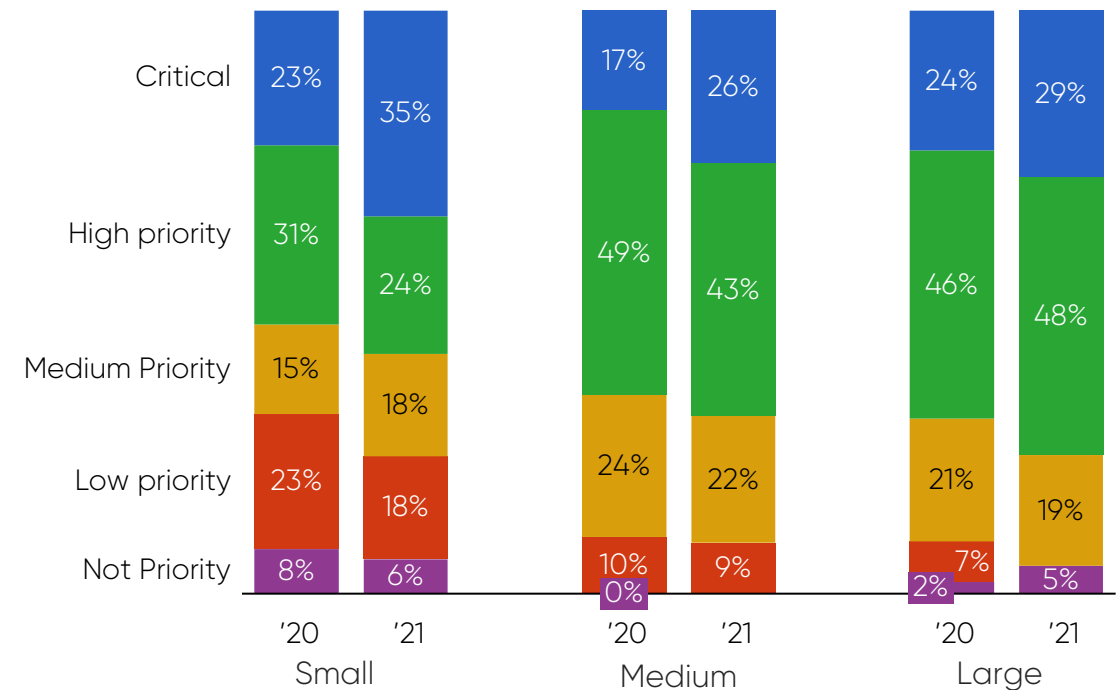
# Work & Lifelong Learning. Lower overall priority than other dimensions, but digital expectations growing.

Compared with other Dimensions, digitization of the Work & Lifelong Learning area is seen as less of a priority overall. However, more than half of institutions identify digitization of this dimension as critical or high priority.

There are increasing numbers of digital solutions in the market for internships, career support, job readiness & workplace simulations, which are likely to continue gaining traction as institutions turn to digital alternatives on this dimension.

*"The main focus of our college is to be a hub for employability, and this is our mantra. Change the paradigm and become responsible for the student's employment and not just for the diploma... we see that one of the most important things is creating a complete journey for the student since day one".*

## IMPORTANCE OF WORK & LIFELONG LEARNING CAPABILITY BY UNIVERSITY SIZE



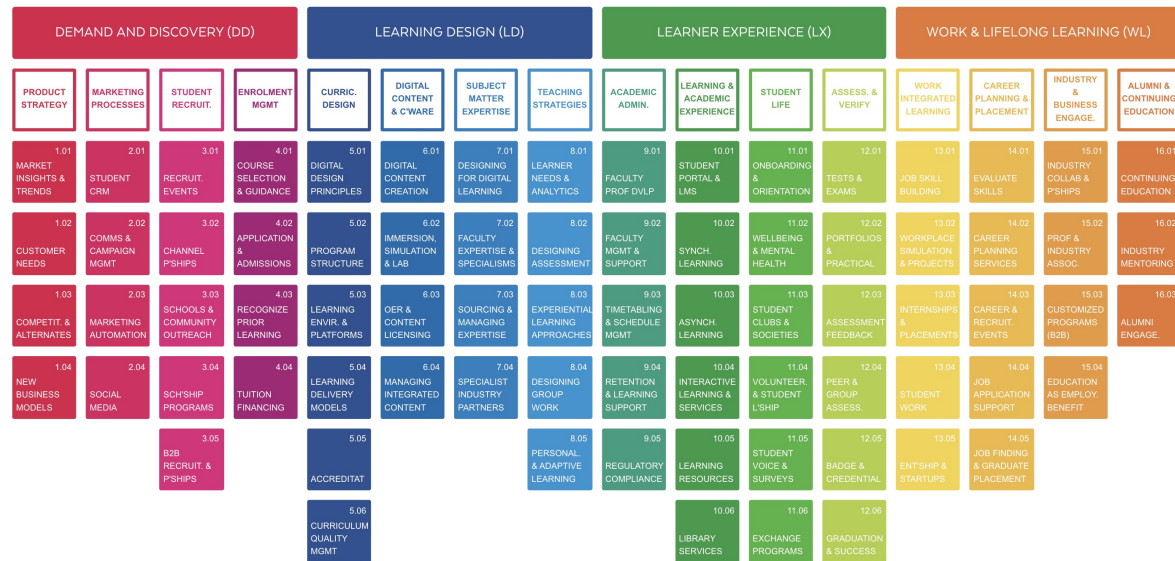
Question. How important are digital capabilities in Work and Lifelong Learning for your institution?



# Next Steps

# Supporting capability building and decision-making

The HEDC Framework identifies key digital capabilities required across the whole student lifecycle. The framework can be used for internal and external benchmarking and ultimately to guide strategic buy, build or partner decisions.

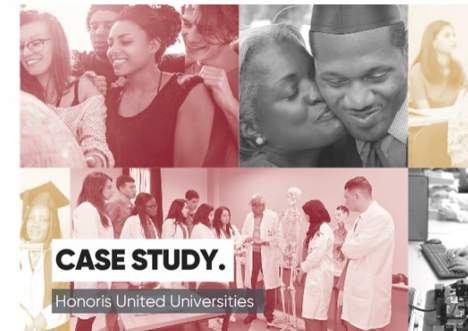


- **Framework.** Building familiarity with language and understanding in context; case studies, applications and examples
- **Self-Assessment.** Individual assessment against 16 core domains. Discussion of perceived performance, gaps and priorities
- **Institutional benchmarking.** Mapping and measuring in context with peers, regional and global benchmarks
- **Strategic decisions.** People, Process and Technology; Buy/ Build/ Partner decisions

# Digital Transformation – Global Case Study Series

Brief snapshots of how institutions are tackling digital transformation and building digital capabilities along the student lifecycle.

- **Challenge.** Drivers for change; focus in learner lifecycle
- **Solution.** Decision-making processes; options and choices; buy/ build/ partner
- **Implementation.** Digital capabilities built; timelines; people/ process/ technologies
- **Impact.** Short and long-term outcomes; metrics and measurement; next steps, scale and expansion.



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