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**HOW COVID-19 PUTS PRIVATE HIGHER EDUCATION AT  
ESPECIALLY HIGH RISK—AND NOT:  
EARLY OBSERVATIONS PLUS PROPOSITIONS FOR ONGOING  
GLOBAL EXPLORATION**

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Daniel Levy<sup>1</sup>, Andres Bernasconi<sup>2</sup>, Elizabeth Buckner<sup>3</sup>, Aurelien Casta<sup>4</sup>, Quang Chau<sup>5</sup>, Asha Gupta<sup>6</sup>, Kevin Kinser<sup>7</sup>, Fatma Mizikaci<sup>8</sup>, Eduardo Navarro<sup>9</sup>, Dante Salto<sup>10</sup>, Juan Carlos Silas<sup>11</sup>, Wondwosen Tamrat<sup>12</sup>, Pedro Teixeira<sup>13</sup>, Yitao Wang<sup>14</sup>, Akiyoshi Yonezawa<sup>15</sup>, Gury Zilkha<sup>16</sup>.

#### Affiliations

<sup>1</sup> University at Albany, State University of New York (USA)

<sup>2</sup> Pontifical Catholic University of Chile

<sup>3</sup> University in Toronto (Canada)

<sup>4</sup> Université de Lille (France)

<sup>5</sup> University at Albany, State University of New York (USA)

<sup>6</sup> University of Delhi (India)

<sup>7</sup> Pennsylvania State University (USA)

<sup>8</sup> University Faculty of Educational Sciences (Turkey)

<sup>9</sup> University at Albany, State University of New York (USA)

<sup>10</sup> University of Wisconsin-Milwaukee (USA)

<sup>11</sup> ITESO, Jesuit University of Guadalajara (Mexico)

<sup>12</sup> St. Mary's University (Ethiopia)

<sup>13</sup> University of Porto (Portugal)

<sup>14</sup> Soochow University (China)

<sup>15</sup> Institutional Research, Tohoku University (Japan)

<sup>16</sup> Economic, Financial & Management Consultant (Israel)

## INTRODUCTION: KEY PRIVATE-PUBLIC AND PRIVATE-PRIVATE VARIABLES

GLOBAL (Daniel Levy)

Global Private/Total Enrollment: 69,808,491/216,660,794 (32.2%)

### *Focus and Purpose of Analysis*

The COVID-19 pandemic has led to countless academic and policy pieces on its initial and predicted impacts in all social fields, higher education prominently included. Most higher education accounts are predominantly descriptive, often chronological, highlighting pain, policy, predictions, and prescriptions. The very question of Open versus Shut, with online and other hybrid alternatives, is itself consuming. The most scholarly works try to employ previously accumulated knowledge about higher education to help understand, anticipate, and even influence COVID impacts.

Committed to that scholarly orientation, this working paper has two principal purposes, inter-related and overlapping. One is to provide the best possible first answers to the pressing question of how COVID affects and will affect private higher education (PHE). Second is to suggest pathways for ongoing research into COVID impacts on PHE. Correspondingly, this introduction to the paper has two purposes. One is to provide background on PHE to help readers understand the national case-studies in broader and global context. The introduction's second purpose, tentatively formalized through 18 propositions derived from PHE research and steered by the case-studies, is to suggest research pathways forward.

Our topic of COVID impacts is huge as PHE holds a third of global higher education enrollment. Thus the co-authors of this paper are all experts in PHE as well as in higher education policy generally. We hope here to reach two audiences. One encompasses policymakers, practitioners, and scholars interested in COVID's impact on higher education generally, a third of that immense terrain being PHE. The second audience, much smaller, is scholars of PHE, as we explore how the COVID epoch reflects, revises, and expands our knowledge about PHE characteristics.

Our focus in treating PHE is on private distinctiveness. Other than spectacular growth, no issue in PHE study has attracted greater attention than how private and public differ. The literature establishes that they do often differ and usually in patterned, replicated ways. Yet it also establishes that the two sectors often show important similarities and blurring; many private sectors have considerable "publicness" (e.g., in government money and regulations) and many if not most public sectors have been partly privatizing, adding to their "privateness" (e.g., drawing more private finance and gaining greater autonomy from standardized public policy

dictates). Distinctiveness between sectors is a variable for repeated analysis. Moreover, distinctiveness is variable regarding shape as well as extent. Related is that neither the public nor especially the private sector is internally uniform. Thus parts of the private sector differ from one another and differ from the public sector in different ways from how other parts of the private sector differ from the public sector. So the paper tackles the variables of both distinctiveness between private and public (intersectoral) and within PHE (intrasectoral).

The reality of distinctiveness within PHE suggests the misleading nature of an alternative title such as “COVID-19: Is Private Higher Education a High-Risk Patient?” Granted, the unfolding paper shows that Yes would more often be a better simple answer than No—but findings also repeatedly show how any such simple answer is misleadingly inadequate. Whether private is high-risk depends not only on myriad other factors from beyond and within higher education, but importantly on which part of the private sector we place under the microscope. Some parts droop or even dangle in peril, others not. As befits a plural, decentralized sector, many individual institutions may be at high survival risk while the sector overall faces no survival risk.

### *PHE’s Global Size and Shape*

Before proceeding to this introduction’s general propositions for further research on vulnerabilities and opportunities for global PHE and to the paper’s case-studies of initial observation, we should provide a thumbnail sketch for context, this short paragraph on PHE size followed by one on PHE shape. Until the middle of the twentieth century PHE was non-existent or quite marginal in most of the world, the US the singular, towering exception. Latin America was the next region in which PHE became widespread, Asia most prominently overlapping. By the turn of the century, PHE had leaped to hold 28 percent of global enrollment, roughly its U.S. share. By 2015, global PHE held 32 percent. The slackening of PHE proportional growth has come without a slackening in raw growth, from 27 to 70 million in the century’s first 15 years. PHE enrollment now concentrates in the developing world. Asia is the giant in raw PHE size, with 42 million students, over half the global total, whereas Latin America easily leads in private share, with slightly over half the region’s enrollment. But with significant PHE growth since the 1990s, even Africa has 20 percent of its enrollment in PHE, PHE spreading a little later nearly throughout the Arab region to 16 percent. Last in share, even Europe has 14 percent in its private sector. In astonishing contrast to the world of 50 years ago, all except about 10 countries have PHE. (For parallel data through 2010 see <http://prophe.org/en/global-data/>, with the 2015 data forthcoming there.) Consequently, COVID’s impact on PHE is almost always relevant to important questions about COVID’s impact on higher education and it is often crucial to answering the questions. Although this

paper includes country cases from Africa (Sub-Saharan and North), Asia (East, South, and Southeast), Europe (Western and Eastern), the Middle East, and both North and South America, it neither seeks nor claims to find any regional or sub-regional patterns in COVID PHE impact. It therefore makes more sense to roll out our national cases in country alphabetical order than to put e.g., Portugal as a case of Europe. Regardless, as we read and ponder cases, we should hold in mind the broadest question of COVID's impact on higher education is answered mu.

The principal typology of PHE depicts three subsectors. The largest by far is non-elite. Especially in developing regions, non-elite is largely “demand-absorbing,” as the fast-expanding public sector fails to meet much of the faster-growing demand. A second non-elite type is “product-oriented,” mostly shaped toward the labor market. In contrast lies PHE's elite subsector. Whereas its world-class type is very rare outside the US, much of the world now has what is internationally “semi-elite,” though rather elite at home. Its status and quality, as well as the SES of its students, is generally higher not only than in the non-elite subsector but also in most of the public sector. A third subsector is “identity,” but as our cases do not treat its gender or ethnic types, suffice it here to think of the religious type, by far the identity subsector's largest type.

#### *From Initial Observations Toward Ongoing Research*

The ensuing national case studies will show repeatedly how, with knowledge about a country's PHE, we can get well beyond asking the dubiously inclusive question of whether PHE is high-risk and we can similarly get beyond settling for a misleadingly general answer or a rather inconsequential and bland “it depends.” Thus, the sum of the case studies shows that COVID private-publics impacts are far from serendipitous and much can be understood through our basic knowledge about general and national private-public and private-private interfaces.

We temper this assertion by acknowledging that more substantial knowledge about impacts must be ascertained through further study over time, “further” referring both to more in-depth analysis and more cases. Nonetheless, even this paper's case-studies diagnose with some guidance from the PHE literature in making their initial national empirical observations.

As we move forward beyond initial observations, we wish further research to become more grounded, often explicitly, in propositions like the following, drawn mostly from the PHE literature. In this regard, the paper's lead author draws freely off his own years of research to develop this list of propositions. Whatever guidance we hope the propositions provide for future research, we hope also that they prove useful as readers digest the meaning of the ensuing initial national cases. The propositions are evidently tentative and there is no

presumption that those that hold up most often necessarily have more impact. How well the propositions hold up as generalized findings--meaning in at least an overwhelming majority of instances and enhancing understanding of individual cases--obviously remains to be seen, as does the weight of their impact. With these forward-looking perspectives in mind, this paper forgoes a separate Conclusion following its case-studies. It does tentatively appear, however, that the propositions get anywhere from moderate to strong support from early observation of national cases. It likewise then tentatively appears that private institutions are on average at greater risk than public ones but that this generalization demands vital qualification including by the particular kind of risk and private institution in question.

Table 1

## Propositions Applying PHE Research Findings to Analysis of COVID-19 Impacts\*

1. Private-public matters significantly, in discernible ways, in all national cases.
2. Yet private-public similarities (including system-wide policies or impacts) also appear in all national cases.
3. Both how and how much private-public matters vary by case and in ways strongly related to extant systemic private-public distinctions and similarities.
4. Notable parallels to claims #1-3 hold inside private sectors.
5. A salient variation among public sectors that likewise conditions the degree and shape of private-public distinctiveness is whether the public sector has considerable privateness (e.g., substantial tuition, autonomy from government, and business involvement).
6. COVID's economic effects on families and businesses have more direct, heavier effects on private than public higher education.
7. On the family financial side, the central ongoing burden that can become deadly with COVID is PHE's tuition.
8. #7 holds especially for "demand-absorbing PHE," which marks the extremes of PHE's average inferiority to the public sector in status, legitimacy, and student choice ranking.
9. On the other hand, individual private universities of the semi-elite, religious, and product-oriented type (especially in developed countries and in developing ones comparatively more developed than neighboring, exporting countries) are vulnerable to COVID-slowed importing of international students.
10. Governments' much lower financial support to private than public in normal times persists in COVID times.

11. Government emergency assistance that does go PHE, as is common in developed countries, is unlikely to go equally, prone especially to earlier termination. .
12. In most respects, however, the flip side of #8 is that most private types are not only much more attractive than demand-absorbers but also often are more attractive than most public institutions to many students who can afford (even during COVID) to pay for choice.
13. Led by semi-elite, most private types also have competitive advantages compared to the public sector overall in attracting domestic students who were slated to study abroad were it not for COVID (and something similar may unfold for international branch campuses).
14. These same private types have advantages over most public higher education in professional business management and both the will and flexibility for expeditious change. Yet resource robustness is vital for coping and there public often has the average advantage.
15. The single most apparent, weighty example of point #13 in COVID is online delivery.
16. Though usually lacking in professional or innovative management, even demand-absorbers have more flexibility than public institutions to adjust budgets to crises, notably by carrying much less costly staff and infrastructure.
17. COVID's effects on government budgets impact the public more than the private sector of higher education.
18. These negative financial impacts may in turn impact public quality, status, or order in ways that can become indirectly beneficial to favored PHE types.

Sources: Principal sources include Daniel Levy, *Higher Education and the State in Latin America: Private Challenges to Public Dominance* (Chicago: University of Chicago, 1986) and a nearly completed book manuscript, *A World of Private Higher Education*, as well as this working paper's ensuing case-studies.

\* Note: Propositions #1-5 treat key general sector variables, whereas #6-11 explain why more private than public institutions are at high risk of death or serious casualty, whereas factors #12-18 identify factors within PHE and between parts of PHE and the public sector that suggest why some private institutions may weather COVID impacts better than many public ones and why it is not always clear that the net COVID effects will be worse for the private than public sector.

**ARGENTINA** (Dante Salto)

Private/Total enrollment: 748,554/2,966,125 (25.2%)

The COVID-19 pandemic and national government's consequent lockdown of all non-essential activities in March 2020 hit an Argentina already on the brink of economic crisis. All universities but one switched their course offerings for the new semester online.

This adaptation to providing online education follows two decades in which the private sector substantially increased enrollment in online programs (from 31,000 in 2010 to 86,000 in 2015) while face-to-face enrollment remained stagnant (from 321,000 to 325,000). Especially notable is how much this capacity building was done by the non-elite subsector, creating a sizeable niche that neither private elite nor public universities had exploited. Public universities enroll three of four higher education students, but serve only a small fraction online. Few public universities are outliers. The leading resister, the University of Buenos Aires (UBA), is by far the largest university in Argentina. It postponed classes until June--instead of the regular March start--alleging that moving instruction online would significantly affect quality. Recently, and due to the extension of the lockdown, the university announced that most academic units have transitioned to teaching online based on the original academic calendar.

However much to attribute the private-public online differential capacity to innovation versus resistance to change, program offerings undeniably facilitate PHE online capacity. Except for some health sciences programs offered in its semi-elite institutions, the private sector enrolls the vast majority of its students in social and commercial fields. These programs do not require practical training such as medical residencies or scientific lab work, making the transition to online instruction not as burdensome.

Whereas online offerings mark PHE's most striking intersectoral advantage, the quite decisive distinction in funding sources marks its most striking disadvantage. The only public funding to PHE is for research and only a few private elite and religious institutions do research. Some also fund raise but they are not allowed to set up endowments and thus donations are mostly limited to one-time capital projects. Thus, PHE is hugely tuition dependent.

Moreover, students and their families must cover the full price of tuition and fees. The government does not provide any type of financial aid (loans or scholarships) to PHE students. It follows that likely non-elite private universities will face the greatest financial challenges, and possible enrollment decline, due to the students' reliance on middle and lower-middle class family income. Where PHE may have some financial adaptability that the public sector lacks is that most of its academic positions are temporary and part-time. This is particularly true of non-elite PHE. On the other hand, full-timers may not be so financial burdensome for leading private universities since many of them are funded by the national government's National

Scientific and Technical Research Council (CONICET). Of course, as obviously true for the entire public sector, much then depends on the fate of the government budget amid a dual health and economic crisis.

### CANADA (Elizabeth Buckner)

Private/Total enrollment: 183,428/1,564,125 (11.7%)

Canada's PHE operates so much in the shadow of a large public system that it has been called "invisible" by scholars. Private universities tend to be small, tuition-dependent, and given less academic autonomy than public universities. As a result, there are various ways in which private universities' experiences navigating the challenges of COVID may differ from those at public universities. Moreover, crucially, we can assume that the full range of distinction between private and public higher education is greater than depicted in this entry since lack of information blocks inclusion of private colleges, with the majority of PHE enrollment, and which tend to be small commercial enterprises.

First, a major issue facing all universities in Canada is that 21.4% of all students are international, more than half coming from China and India, and some public and private institutions enroll more international than domestic students. As long as Canada's border remains closed, it will continue to be difficult for international students to physically come to Canada. Such a barrier would appear more dangerous to private than public universities where the latter are larger and more attractive to Canadian students. Similarly, then, it might be a special help to private universities that the government has changed eligibility requirements so that students (both graduate and undergraduate) can begin their programs outside of Canada and complete up to 50% of their programs online and still qualify for post-graduate work permits.

A second and sharper private-public difference with likely economic consequences stems from the basic fact that all private universities are tuition-dependent and (except in Alberta) do not receive public support; as a result, fees for domestic students tend to be higher at private universities. Any economic recession that hits the middle class may reduce families' willingness to pay for private universities. One private university explained that given the uncertainties, they had already laid off dozens of employees on a temporary basis, and a smaller number on a permanent basis.

An intersection of the tuition and international variables yields an important juxtaposition of private-public similarity and difference. The government's Canadian Student Emergency Benefit (CSEB) benefits all domestic students, regardless of sector, but excludes international students, a potential body blow for private universities dependent on international students.

Private universities' small size and lack of political clout can further hurt. At an extreme, one new private university was initially omitted from the list of post-secondary institutions, meaning their students were unable to access CSEB benefits. A broader manifestation of power limitations is that private universities appear to have less direct access to provincial decision makers than large public institutions do, and provinces are the primary policymakers in Canadian higher education.

On the other hand, private universities have sometimes found ways to make small size an advantage for flexible responses to COVID. One university explained that small size is its main advantage in implementing strategies infeasible at most public universities. It divided undergraduate students into eight "families" that each has its own "neighborhood," which allows it to maintain a strong sense of community, safely. The university also believes that it will be able to implement social distancing policies to allow students in certain programs to return to campus for in-person labs or other forms of instruction. However, size may cut two ways for reopening where, for example, a private urban campus can be so small as to render social distancing impossible.

As of summer 2020, Canada seemed to be in a good place regarding COVID and therefore its impact on all higher education, certainly compared to the US. But if COVID impacts persist or worsen, the sectoral context of Canadian higher education appears to hold particular perils for PHE.

### CHILE (Andres Bernasconi)

Private/Total enrollment: 1,034,181/1,222,774 (84.6%)

Whether private institutions of higher education may experience the consequences of COVID-19 differently from public ones is a question that, for several reasons, seems to have a clearly affirmative answer in the global scenario. Not in the case of Chile, though, which is characterized by a higher education system that tended to blur the public-private difference since the early twentieth century, then experienced a period of heightened private-public distinctiveness when higher education expanded through private provision in the 1990s, and has since reverted to homogeneity through funding and other policies that treat both sectors equally.

In effect, globally, private and public higher education are quite different. Typically, private institutions do not receive public subsidies and are funded instead through tuition payments. On the contrary, public institutions outside of the Anglo-American sphere are often free of charge for the students, or more recently, as a consequence of cost-sharing, have introduced modest fees or are expected to sell services to the industry. Therefore, the possible instability in

the flow of tuition revenue, resulting from the looming economic crisis, should be a greater problem for PHE. Conversely, cuts in the state budget for education, stemming from redirection of funds to the health sector, or diminished tax revenues, should expose public institutions much more than privates

This is not the dominant case in Chile, where public universities started charging tuition at par with privates in the 1980s. And while the public sector has thus taken in private money, PHE has received some state subsidization since the 1920s. More recently, when in 2016 Chile flipped to free tuition for students in the lower six income deciles at all public institutions, it extended the new policy to private institutions with high accreditation status. Thus, the free tuition subsidy presently represents some 40% of the revenue of public and participating private institutions. Shortages in tuition revenue are likely to affect public and these private institutions more or less similarly, and both sectors are equally somewhat protected by state subsidies, including those for free tuition.

But Chile's comparatively striking private-public homogeneity has a major limitation: private institutions lacking high accreditation status, and thus continuing to function without general public subsidies, likewise remain outside the free tuition program. However less important they may be academically, these private institutions enroll some 50% of all students in Chile. They are quite vulnerable to a prolonged recession's impact on family income. On the other hand, they would be relatively immune to cuts in the education budget, as they rely solely on tuition.

It is often said that one advantage of private institutions over their public counterparts is their organizational agility, unencumbered by bureaucratic red tape. This is acutely the case in Latin America, generally saddling public education with baroque rules and regulations typical of their ineffective and often bloated and corrupt public administrations. Therefore, anything that is needed to do to adapt to an economic crisis, especially if it is painful, like closing programs, scaling down campuses, reducing salaries, and firing people, is more readily doable in the private environment. Yet here too, Chile is as exceptional as it is typical. While the public sector in Chile faces more rigidities than private institutions, public entities are legally allowed to take measures such as those just noted (though another thing is the stiffer political opposition to them). Thence, whatever advantage accrues to the private sector in terms of the room of maneuvering is not uniformly clear-cut.

A key COVID dimension of the flexibility issue is the capacity to turn to online classes. Here too, capabilities do not depend on the juridical status of the institution. To the extent they depend on overall academic and operational robustness, including in financial resources, these strengths (and their opposite) are evenly spread across both sectors in Chile. Indeed, the whole higher education system is as of this writing (July 2020) fully set to online teaching, with no

discernible difference between private and public. And if a few institutions are lagging behind, the relatively weaker private institutions find their match in the least well run publics.

In sum, it seems *prima facie* that there will be comparative little net difference in how the pandemic and its consequences will affect Chile's two higher education sectors. Institutions in one and the other camp have come to have more similarities than differences with one another in key dimensions linked to the pandemic's impact. The public-private homogeneity across sectors, an exceptional feature of Chile pointed out by Daniel C. Levy over 30 years ago, and though then shaken with the introduction of numerous new private institutions, has re-strengthened in the last 20 years.

### CHINA (Yitao Wang)

Private/Total enrollment: 5,871,139/43,367,394 (13.5%)

We here consider three main areas of COVID's initial and possible future impact on Chinese PHE. Tentatively, at least, the three taken together suggest considerable peril to PHE from the pandemic.

**Tuition.** The pandemic's economic damage means that fewer families can afford private tuition. In market terms that could suggest tuition reductions, but it is government, especially provincial governments that usually sets tuition levels. In other ways too, government takes measures that appeal to families while undermining PHE competitiveness. In April, the education ministry proscribed advance collection (the usual practice) of room and board fees. Similarly, government insists that private institutions refund room and board for Spring 2020 time not spent on campus. In addition, beleaguered institutions suffer further from the loss of revenue normally generated by on-campus vending to students.

**Enrollment.** As with tuition, so with enrollment, Chinese PHE lacks the autonomy to make its own decisions on how to confront COVID challenges. On enrollment, we see a major cleavage within the sector. Government's quota on bachelor' degrees at private colleges is low enough that it likely will be reached despite COVID's impact on family finance. But private colleges limited to the associate bachelor's degree often fail to reach their allotted quota. Here COVID's impact could be that the less attractive private institutions fall even further from the enrollment they find economically viable.

**Teaching.** China fits the global tendency that PHE is more frail economically than public higher education and this can be an inherent teaching disadvantage. As seen in several of the paper's other case studies, PHE management and innovation sometimes weighs to offset that disadvantage. But again here, we note the limited autonomy of Chinese PHE. Whatever the mix

of reasons, the reality is that private generally trails public in educational technology and methods, with less funding for teaching and online education resources, methods, teaching platforms and equipment. Moreover, the private-public contrasts manifested in teaching facilities reflect broader PHE financial and management weaknesses that might together result in a widening gap between the private and public sectors during the pandemic.

In some ways, the limitedness of most Chinese PHE institutions means that they do not suffer as much as Chinese public higher education. An obvious example is PHE's lack of scientific research; COVID-compelled laboratory disruption does not affect it much. Similarly, Chinese public universities normally obtain important revenue from teacher and other social training; lacking the social prestige to offer much such training, PHE is likewise not as greatly damaged by disruption of normal activity. But examples such as these are small solace for a sector generally more imperiled on core matters of tuition, enrollment, and teaching. The severity of the peril correlates strongly with the overarching reality that Chinese PHE is overwhelmingly non-elite, a comparatively weak sibling of Chinese public higher education.

### **ETHIOPIA** (Wondwosen Tamrat)

Private/Total enrollment: 126,564/757,175 (16.7%)

Ethiopian PHE comprises around 17% of national higher education students. Though this share is rather average for Sub-Saharan Africa, Ethiopia is a regional leader in private sector size. Enrollment spreads over about 250 institutions, half in the capital, and dominated by small, demand absorbing, for-profit institutions, often family-owned, and providing training in rent buildings. Nonprofits are few, though generally better resourced, often religious. Receiving little or no government support, PHE relies on student tuition and fees. These salient PHE characteristics have shaped the COVID impact even on forces affecting both private and public sectors while making other problems particularly salient for the private sector.

The first manifestation of COVID's impact commonly on both private and public higher education came with the government shut down of all institutions' face-to-face teaching on March 17, directing their educational provisions to be online. Since then, private institutions have scrambled to respond to difficult challenges including online delivery, awareness creation for their community, and ensuring institutional continuity. Shifting to online has been the major preoccupation for all private institutions, located mostly in cities and towns, but it was especially difficult for public universities whose undergraduate students went back to their families where there is limited or no internet access. Nevertheless, private institutions still face myriad obstacles: poor internet access, cost, availability of computers and related technology, little previous preparation, and students' and teachers' twin problems of limited technical

knowhow and negative attitudes towards the use of information and computer technology. Most institutions are using social media platforms like Facebook, telegram, WhatsApp and Google classroom in their program delivery, a few struggling to develop their own Learning Management Systems lately.

Whereas the initial government shutdown had a largely common impact across sectors, its declaration of a state of emergency a few weeks later loomed as potentially disastrous for many private institutions. Government prohibited all employers, including in higher education, from reducing their workforce even temporarily and from prematurely terminating employment contracts. Whereas this measure may appear sector-neutral and carry a certain populist, protective appeal, it translates to unrealistic commands for PHE. Along with rent, salary accounts for three- fourth of PHE's monthly expenses. Moreover, collecting monthly student tuition has not been easy. Pressured, PHE conceded a 25% monthly fee reduction. But PHE students complain about the unfairness of paying anything like their regular fees for merely online education (itself poorly delivered). In contrast, public higher education is mostly tuition-free and its institutions continue receiving their regular government subsidies. Whatever assistance government has provided to private enterprises has mostly gone to manufacturing, hotel, horticulture, floriculture, and others labeled most affected by the pandemic—PHE not on that priority list. Benefits extended so far to PHE institutions have been restricted to a four-month employee income tax exemption, postponing pension payments for a few months, and a regulation that bans landlords from increasing rents and evicting tenants including PHE institutions.

Because PHE depends almost solely on tuition from its undergraduates, lacking whatever graduate programs and research programs run on public funds in public universities, government policy that cripples undergraduate finance is a weightier problem for private than public. Government has prohibited both the graduation and promotion of undergraduates until face-to- face classes resume. Meanwhile, any prolonged shutdown means postponing new admissions and thus an unknown period for private institutions not to receive income from new students.

This litany of severe financial woes will likely force many private institutions to close down or at least downsize. Most private institutions are already apprehensive about surviving beyond several months. Naturally, the threat tends to be greatest to the newest and flimsiest institutions, generally the demand-absorbers.

By the same token, however, the stronger private institutions will cope better—and we can see even some possible opportunities for them. For one thing, only some of the woes noted above are exclusive or even predominantly PHE woes. It is public higher education that depends on

government subsidies and the governmental budget for them stands imperiled as the pandemic's economic impact is estimated at \$3 billion by the end of 2020 alone. A reduction of public sector capacity could open space for private providers. They may be able to attract students as tuition is often comparatively low, at least as long as employees at both public and private enterprises continue to earn their salaries under the protection of the government. Interest to invest in such a volatile sector, presently reduced, could return with a national economic rebound. It is at least possible to envision a post-COVID future in which PHE has lost much bad as well as some good from its long unbridled expansion and in which some of the fitter not only survive but improve their organizational management and certainly their use of technology in educational provision.

### FRANCE (Aurelien Casta)

Private/Total enrollment: 496,979/2,424,158 (20.5%)

Two principal points stand out in considering private and public dimensions of COVID's impact on French higher education. The first is a relative though not full similarity of public policy toward the two sectors, or even three sectors if we choose to consider for-profit and nonprofit private as separate sectors. The second point is that, nonetheless, PHE appears to face special enrollment dangers.

It is in comparative terms unremarkable that national government closed all face-to-face education in March 2020, a decision binding irrespective of sector. Much more remarkable for outsiders who associate French educational and other public policy with statism is that that post-Napoleonic policy in higher education has been largely sector neutral. Long historically the case, the same became the case for the for-profit subsector that has arisen in recent decades. Of course, financially-oriented ministries are often agitated when they perceive public universities as bureaucratic and poor servants of the market economy, but the ministry of education makes more and more government higher education policy and it has not been conspicuously hostile to PHE.

So it is with COVID that nonprofit and for-profit PHE have enjoyed access to exceptional government relief funding similar to what public higher education has. In the early going, differences have been less across sectors than within the substantial hierarchies across private institutions, within both the nonprofit and for-profit subsectors. The government's emergency financial support package is accessible to students enrolled in private as well as public institutions. But matters may play out fundamentally differently between private and public on employee compensation. The public sector's higher education staff is mainly composed of civil servants who remain fully paid during the crisis; whereas government extended similar salary benefits to employees and similarly delayed (sometimes cancelled) obligatory employee social

tax contributions at all non-profit and for-profit organizations, it plans to make assistance to PHE employees only temporary. On the legal front, even after face-to-face courses ceased, claims for reduction or repayment of fees have emerged in only three private institutions.

Even leaving aside the prospect of government discontinuing its assistance to PHE employees, a huge concern, PHE faces other special enrollment threats as France looks to its next academic year. More than its public counterpart, PHE's enrollment fate depends on businesses' fate. PHE relies on private companies' funding dedicated to training and "sandwich courses." As even the nonprofits' enrollment lies mostly in vocational and commercial fields, it needs businesses to be healthy enough to hire. Meanwhile, for-profit PHE's enrollment is fully in those fields.

Another major private enrollment challenge lies on the international front. Many private higher education institutions rely on international students and most charge high tuition. A general slowdown in international student flows especially endangers these institutions. Nor is the threat totally from the marketplace. Government is shaping potentially long-lasting immigration controls. So even where government policy may be made in a sector neutral way, the impact could be more detrimental to PHE.

Although the international threat to PHE may be offset by PHE's offering more of its courses online, patterns found in other countries, there is a catch in the French case. After completing their baccalaureate, French students aspiring to private institutions must take face-to-face exams and only rarely do either for-profit or nonprofit institutions offer an online alternative. Their claim, echoing the most venerable public institutions (e.g., Polytechnique) is that those face-to-face exams confer a quality advantage over the public universities sector in student selection. Whatever the implications in normal times, the restriction endangers enrollment in the COVID era. The matter gets considerable media coverage. Meanwhile, public non-universities offer their entrance face-to-face exams while public universities continue to accept all students who have finished their baccalaureate, underscoring the public sector's commitment to widespread access.

## INDIA (Asha Gupta)

Private/Total enrollment: 18,582,259/32,107,419 (57.9%)

Approximately three-fourth of Indian higher education institutions are privately managed. Pre-COVID, projections were for continued great private growth as the public sector fails to keep pace with powerful demand. Whereas the pandemic is likely to bring shifts in in the higher education landscape, most obviously with more online or blended learning, we can make only tentative, informed suppositions about COVID's differential impacts on the private and public

sectors. Both sectors face severe disruptions, neither well prepared to respond to the crisis in financial or technological terms.

Much differential impact will be intrasectoral. Both top public and private universities and colleges could provide education online during the COVID-19 lockdown, as they had the requisite infrastructure resources and expertise. But both sectors are replete with second tier institutions, with only average financial and IT support. Their inability to switch very effectively to digital learning relates also to their faculties' lack of formal training and experience. Many of these private and public second tier institutions resorted to existing applications, such as WhatsApp, Facebook and Google, on trial bases.

More private-public distinction shows as we look at India's third tier, as here PHE account for the bulk, its demand-absorbing institutions having proliferated so much in small towns, villages, and cities. They have poor infrastructure, limited IT facilities, and almost negligible technical support. Some simply resorted to asking students to utilize the national government's online platforms. But many of their students are low SES unable to afford large data subscriptions for online content. Many have poor Internet connections, though this can be said of students at many of the weaker public institution too.

The government is urging business to invest in higher education to make India an education hub post-COVID, converting the crisis into an opportunity. We might expect such investment to concentrate in the first tier, whether or not disproportionately on the PHE side. Where top-tier private institutions may have a great advantage is in attracting many of the roughly 100,000 thousand Indian students annually seeking higher education abroad. Though the top Indian private institutions are costly by domestic Indian standards, the costs are still acceptable for being less than those of study abroad. Moreover, many of those who would have gone abroad could not make the competitive cut for India's top public universities, highly selected. There is much potential growth too for foreign university collaboration in online offerings, whereas the domestic private-public implications remain to be seen.

Perhaps the most decisive private-public difference lies in tuition. Within each of India's three tiers, private costs more than public. Thus, where COVID leads to financial difficulties for families it is only logical that many of PHE's students and would-be students would find themselves unable to meet private tuition. Though some private institutions are offering some cost relief, it is not robust and students apparently have little recourse in the courts. However, the perception of insufficient fairness to students and lack of quality could damage the private sector overall, which generally carries a burden of suspicion about its legitimacy in India. Some affected PHE students would likely flock to public institutions whereas insufficient public supply might leave them cut off from higher education altogether or choose online mode.

Others might opt for short term but job-oriented courses online with opportunities for some practical training face to face. Only those who wish to opt for pure academics might opt for full term courses in arts, commerce and humanities.

## ISRAEL (Gury Zilkha)

Private/Total enrollment: 44,923/304,189 (14.7%)

Although the Coronavirus has affected the Israeli economy heavily, at least in the first half year high-tech and higher education weathered the storm comparatively well. Yet, while there is insufficient evidence for gauging future impact, and we lack estimates for the coming academic year's enrollment, one suspects that at some point PHE may fare less well.

To contextualize the matter, Israeli PHE accounts for 15% of enrollment, all at 11 colleges. In contrast, while the public sector also has colleges in non-urban areas, it concentrates mostly in universities. These public universities (legally nonprofit) broadly resemble those of the UK and US in having considerable autonomy and more than minimal private financing. Whatever the public-private ambiguities in the public sector, the contrast is strong to the private sector with its high dependence on tuition rather than public subsidies. This tuition dependence is the main special vulnerability of PHE to COVID's impact.

Although Israel is among those countries with substantial public-sector tuition (\$3,000 USD), private tuition is substantially higher (\$7,000 USD) and thus similar families similarly hard-hit economically by COVID would have a tougher time paying private than public-sector tuition. Moreover, the average family SES is not similar across the sectors, being higher in the public sector, with its major university component. Thus, whereas tuition fees in the public sector are equivalent to less than 40% of total income, in the private sector they are almost 90% of total income.

Beyond tuition, private-public differences appear less decisive in determining what COVID impacts might be. Noteworthy for its absence from a cataloguing of these differences is online education, often in other countries weighing in favorably on the private side. Reflecting Israel's advanced technology and higher education development, almost all higher education institutions were fit to go fully online during the first COVID semester. That includes the Open University, which has over 40,000 students and runs online courses all year around.

PHE's main claim to a comparative intersectoral advantage in facing COVID lies in its flexibility. It is able to change more quickly. Its track record shows greater adaption to changing market needs, including more adeptness in creating new curriculum. If a private advantage lies in concentration in market-related fields, a vulnerability lies in the narrowness of its offerings in business and law.

Public universities and colleges, heavily subsidized by government, expect only minor budget cuts. Of course this depends on maintaining enrollments, a stronger prospect for the universities given the multiple forces that undergird strong student demand and ability to pay, whereas public colleges have more cause to fear some enrollment decline. Regarding faculty (and administration), collective bargaining guarantees job security. On the other hand, the public sector may be more vulnerable than the private sector insofar as it tends to be less adaptive to business needs, an important point as COVID induces unforeseen shifts in the business world. Another vulnerability lies in public universities' greater dependence on donations and philanthropy, though damage could be less short- than long-run. Whereas the intersectoral contrast on flexibility is fairly common, the intersectoral contrast on donations and philanthropy is rather particular to Israel, as outside Israel and the US the giving tradition tends to be weak for public higher education.

As long as COVID leaves the economy in recession, with unemployment, PHE is more vulnerable than public higher education for a set of inter-related reasons revolving around affordability. In such a situation, PHE would hope that its claimed innovation and flexibility prove major counterweights. Taking such factors as variables within a competitive private sector, likely some private colleges will fare better than others.

### JAPAN (Akiyoshi Yonezawa)

Private/Total enrollment: 3,028,302/ 3,845,395 (78.8%)

#### *Similar Disruptive Impacts on Private and Public*

Japan has a vast and long-established private higher education system. The functions and profiles of private universities in the country range from semi-elite to demand absorbing. Almost all of these institutions, including the most prestigious ones, rely on tuition fees as their main financial resource. Relatively modest at least in many fields and no higher for foreign students, they are around 60% or more higher than in the public institutions.

As with its East Asian neighbors, the initial impact of COVID-19 on Japan was relatively minimal. Nevertheless, almost all the K-12 schools were closed in the end of February upon the request of the Prime Minister. A State of Emergency likewise led to the suspension of a wide range of higher education and other activities in April through May. Postponement of the spring term occurred at roughly 9 in 10 institutions in each sector alike, roughly 90% of privates and all publics then introducing emergency remote teaching. Nor were there major differences in enrollment impact on the sectors, the entire public sector did, even as there were COVID impacts on higher education generally--new students not moving to planned campus locations (instead accessing online learning from homes), and the majority of new international students

unable to enter Japan and instead starting their online classes in their home countries. Similarly, students living at or near campus faced difficulties common in both sectors: closure of university dormitories and places for studying and holding extra-curricular activities, dwindling opportunities for part-time jobs, increased uncertainty about jobs and further studies after graduation, and family financial instability, and consequent mental health concerns.

### *Financial support for students*

Given these circumstances, some students requested tuition fee reduction, particularly for the charges for the use of facilities on top of basic tuition. Demands spread mainly through signature campaigns on social media across universities and brought relatively prompt yet variable responses from universities and government. The national government provided emergency cash handouts to both domestic and international students regardless of sector, in addition to expanding the existing fellowship and loan schemes.

Some significant difference emerges between public and private higher education institutions as well as among private ones in the range of students covered by financial assistance. National and local public universities provided students from low socioeconomic backgrounds with comprehensive support measures, including increasing the number of tuition exemptions and reductions, and adding their own emergency loans, providing free rental of PCs and Wi-Fi, and opening paying work opportunities on campus (e.g. Tohoku University). While leading private universities took similar approaches to the students facing difficulties (e.g. Waseda University), they also send a clear message that they were not open to tuition bargaining. Other private universities, without long applicant lists felt obliged to provide more generous support packages (e.g. Teikyo University) or funds for purchase of equipment necessary for online learning to all the students, which could be interpreted as de facto tuition bargaining (e.g. Meiji Gakuin University).

It is still too early to determine what will become of enrolment and graduate employment rates both public and private higher education in the coming year. However, tuition-dependence may make many private institutions vulnerable, especially lower-level ones already long imperiled by the country's demographic decline. To this point, however, common forces from COVID itself and common needs across sectors, including as seen and acted upon by government, have limited private-public differences without negating them. A survey by Educe School Service Institute finds, applicants (and their families) for admission next year concerned about tuition fees and the financial support, a concern especially evident among professional training colleges (diploma level postsecondary institutions)—which are mostly private. As we pay attention to how private institutions set tuition fees for the coming year, we must bear in

mind both their much greater autonomy and flexibility in decision-making compared with national and local public universities and the simple fact that their tuitions are usually set principle higher than their public counterparts’.

### **MEXICO** (Juan Carlos Silas and Eduardo Navarro)

Private/Total enrollment: 1,040,863/3,515,404 (29.6%)

The Mexican government’s lack of interest in involving the private sector in the development of official higher education policy manifests itself in the COVID crisis, highlighting already evident intersectoral differences. After initially closing both public and private education sectors (at all levels), government has largely ignored PHE.

Where the government almost immediately issued health management guidelines, including research on matters like “flattening the curve,” it reached out to the public national university, national polytechnic institute, and state universities. Most PHE institutions lack research in related sciences but there are major exceptions. Moreover, the main PHE associations have had no influence on health policy, instead merely playing a role in disseminating information.

Where private-public differences have been blurred is not through government help to PHE but rather by a stunning lack of government help for even much of public higher education. No governmental program supports public or private universities or even their students (the sole exception being continuation of a small stipend operating before COVID and for only public university students). Public universities that had already suffered budget cuts before COVID have suffered further cuts. In this sense at least, given that government has not regularly subsidized private institutions, the blow is greater against the public sector. Moreover, sector-neutral ongoing government funding for meritorious researchers and graduate education might suffer budgetary cuts. In stark contrast, the president’s pet project of creating 100 new small public universities, which resemble demand-absorbing private institutions in their low quality, continues un-cut.

Not through any government policy but from its own efforts, PHE has shown a certain advantage over much public higher education in limiting COVID’s dire impacts by having for several years now ventured into online education (mostly blended but also fully online). Even non-elite PHE has done so, finding through this educational mode fertile room to proliferate and expand. Between 2010 and 2020 the number of PHE’s online programs grew by 102%, enrollment in these programs by 168%. Currently, PHE’s online enrollment encompasses 395,092 students, almost a third (28%) of the country’s total private enrollment.

Although online delivery is something of an overall PHE success, important gaps persist within the sector, including in effectiveness and quality. Although around 70% of online enrollment belongs either to large consolidated semi-elite institutions or institutions that are part of business consortia such as Laureate Universities or ALIAT Universities, some 30% of students are enrolled in atomized demand-absorbing institutions, of which 469 (20% of the total of private institutions) have enrollments under 100 students. The tininess of such institutions and their lack of pedigree reinforces suspicion about the quality of their education, aggravated by the harsh economic situation triggered by the pandemic.

PHE must fear a serious enrollment decline (between 10 and 30% for the next school year) due to families' incapacity to pay fees; Mexico expects at least a 6% GDP decline. Some private universities, the pricey established ones, have announced "fee freezes" for the coming school year, but nobody knows if this will be enough to keep business going. Although there is still no official news about reduction in faculty salaries or of firing, it appears that tenured faculty will be asked to teach more courses while those hired by the hour—a very large number in non-elite PHE—will be let go.

### **PORTUGAL** (Pedro Teixeira)

Private/Total enrollment: 55,477/337,507 (16.4%)

#### *General Remarks*

The initial impact was very significant all the system, regardless of the sector, as very few HEIs were used to online provision for full-degrees. After the initial shock (in mid-March) HEIs have been adapting to an online model, especially as the national computing and communications scientific infrastructure has been strengthened (due to the expected overload). The adaptation has varied in formats, but my impression is that it was very ad-hoc and largely decentralized. Some HEIs have tried to replicate the similar schedule of activities (and classes) online and others have moved to more reduced schedule (delegating in students the main task for digesting materials and coursework). Both students and faculty seem to value a return, at least partially, to on-site instruction.

The main model for the next academic year is expected to be a hybrid model, with a combination of some online instruction (videos, some sessions, materials available in platforms) and some on-site instruction with smaller groups. This is likely to trigger changes in pedagogical models of teaching and assessment, which is largely welcome, as HE remained rather conservative in its instruction methods and a bit focused on passive learning.

Mention should also be made to the relevant contribution provided on the research side by contributing to the effort on testing, developing materials, and studying the pandemic in multiple dimensions. This has certainly contributed to improve public perceptions about HE and Science. However, the contribution of PHE on this was negligible, due to its low research intensity, especially on health and lab fields.

### *Specificity of PHE*

Overall, one could say that PHE may not be very different from Public HE. However, some nuances may be relevant:

- PHE may be more capable of pressing staff to adjust and change, both because it needs to show responsiveness and because it leverage over staff is more significant;
- PHE may have some more difficulties, as its online infrastructure is weaker than most Public HE. Moreover, access to bibliographic and didactic resources is much weaker in PHE;
- The disciplinary profile of PHE is also relevant and more favorable, as this sector is very focused in social sciences, which creates fewer challenges than in clinical or experimental fields.

### *Financial Challenges*

The aftermath of the pandemic situation is expected to create major challenges for the HE sector, though the situation may be particularly serious for PHE, due to several reasons:

- They are very dependent on tuition fees as the dominant revenue (almost exclusively so) and the economic and social crisis will tend to affect negatively the demand for HE. This is even more significant, as the socioeconomic composition of PHE is note much better than Public HE, as the latter tends to dominate the most prestigious programs and Institutions;
- They do not receive major public funding and there is no expectation that this will change. Given the competition for budgetary resources, in which HE may not be regarded as a major competitor, Public HE would object any diversion of funding to PHE;
- Students may benefit from some social support mechanisms or access to loans, but this will have a small impact.

Overall, I think PHE will face an even more complex situation after the crisis, especially as it was already facing a difficult situation. The demand had recovered a bit in recent years, after the recession, but it will likely decline again next year and in the following one.

**TURKEY (Fatma Mizikaci)**

Private/Total enrollment: 447,593/6,062,886 (7.4%)

By its March 2020 order, Turkey's national Council of Higher Education (YOK) closed face-to-face education at all higher education institutions, the 79 private "foundation" universities and the 148 public universities alike. After this initial private-public commonality, however, significant differences have arisen between the two sectors in handling students and faculty.

The most striking private edge has come in online teaching and student services (technical, e-mail, SMS, contact platform, informative portals, sites, new technical personnel etc.). Moreover, privates provide more online tests, homework, and projects than publics do. It seems reasonable to relate much of the greater online provision to PHE's "payback pressure" for their tuition-paying students. Notably, the private provision appears to hold even for the non-elite institutions, which is not to say that they approximate the richness semi-elite private universities provide. A starker difference within the private sector is that only semi-elite universities, led by Bilkent (genetics), Sabancı (composite technologies), and Koç (diagnostics), run scientific research on COVID-19. Sabancı donated to the National Health Services' COVID endowment. Like their public counterparts, private university hospitals have rendered pandemic service. In contrast, the bulk of PHE has no research or comparable service apparatus.

Where PHE generally comes off decisively worse than public higher education in substantive and public relations terms is on treatment of its principal groups. However, much PHE students have benefited from online provision, their universities have denied their demands for tuition and fee reimbursement, demands based on the lack of on-site provision and general non-use of campus facilities and resources. Some students have also supported faculty demands for full salaries. Although PHE faculty benefited from initial State emergency support for academics, even semi-elite private universities have cut salaries (up to 40 percent) for full-time faculty, even as online teaching continued, and many private institutions have terminated employment of many part-timers. Such hardships provoked formation of "We Breathe Down the Necks of Bosses Solidarity Network for Private University Workers," showing that even PHE is not immune from COVID-triggered open conflict. Personnel have fared better and public universities. Public universities pay all staff fully. The stark private-public contrast was blurred, however, by YOK's April declaration that PHE must pay its full-timers as much as their public counterparts do.

The same Yok national council that had closed face-to-face higher education in March declared system-wise resumption starting June, 2020 ([www.yok.gov.tr](http://www.yok.gov.tr)). Many universities in both sectors have announced their plans to start the autumn semester with hybrid education and

both need official approval by YOK. Thus, the “bookends” of closing and opening have shown a common overarching government authority whereas the policies during the online COVID-19 period showed marked private-public distinctions.

### UNITED STATES (Kevin Kinser)

Private/Total enrollment: 5,339,918/19,531,727 (27.3%)

Like the country as a whole, U.S. higher education was directly and swiftly impacted by COVID-19 beginning in March. Higher education institutions—private and public alike—were among the first entities to stop in-person activities. Soon, virtually all public and private higher education closed their campuses and moved to remote teaching, mostly through the use of online video meeting software. Administrative and academic meetings also moved to the remote format, leaving the campus infrastructure largely vacant.

Compared to most countries, private-public distinctions are less decisive in the United States and direct impacts of the pandemic therefore show many similarities between sectors, even after the initial closings. For example, many financial impacts are quite similar. The abrupt shut down of campuses sent students in both sectors home and caused institutions to lose revenue from room and board from students. Both private and public institutions offered refunds of campus fees paid by students to access campus recreation facilities and other services, with some also offering tuition rebates as well. In most ways, variance in decision making in this respect less strictly distinguishes public and private but rather reflects the cross-sector reality that better resourced institutions are faring better than their poorer cousins. Even so, the ability to offer tuition discounting and other forms of financial relief to students can be easier for the privates because they typically can act with greater autonomy. As sports schedules were cancelled, including a lucrative intercollegiate basketball tournament that generates billions of dollars in revenue for all participating institutions, the treatment and impacts were again similar between the two sectors.

A more distinctive impact on PHE has been where tuition dependence, small size, and prior precarious financial position lined up. For PHE institutions with these characteristics, the specter of a continued shutdown impacting enrollment represents an existential threat, especially when they were running close to the margins anyway. Most of these institutions have heavily invested in residential instruction and see the campus experience as essential to the education they provide and a justification for high prices. Some major private universities, too, had their own previous financial risk-taking exposed, leading to furloughs of staff and significant cuts to budgets. Such private-public distinctions again do not negate that crucial

variation is also expressed within each sector, with wealthier institutions having more flexibility to avoid, at least for a time, more drastic steps.

Another important private-public distinction involves the partisan politics of the coronavirus response. The significant split between the two major political parties reflects itself strikingly in assessment of the COVID threat and the importance of reopening. Public systems are naturally more caught up in this, with some having been prohibited from requiring masks, for example. With more autonomy from political oversight, private universities have not faced the same pressure. Yet institutions in both sectors have to address the resistance of some segments of the university to public health recommendations from those who see them as reflecting a political agenda.

Because COVID's impact on the economy and in turn higher education was immediately evident, Congress passed emergency relief with pools of money for which all institutions normally eligible to receive the federal government's massive student aid—which is given in a sector-neutral way. Notably, this includes for-profit PHE. Because the funding was per capita and private institutions tend to be smaller than public institutions, the average amount they received was substantially less. As the funding formula also excluded exclusively online students, many for-profits with large on-line programs saw lower amounts than their normally shown size might have indicated. Still, the giant University of Phoenix, for example, received \$6.6 million. Senators Warren and Durbin led the Democratic challenge for the Department of Education to exclude for-profits from these funds but such efforts were in vein under the Trump administration.

Just as both private and public institutions benefited from quick closing, before significant campus outbreaks of the illness, and similarly benefited from the shutdowns conveniently occurring at the point of a normally scheduled academic break, many schools simply telling students and faculty not to return to campus, so both private and public institutions now have to grapple with the prospect that returning students bring the virus back with them, especially seeing how young people are driving the country's summer increase. Under these conditions it will be very difficult for colleges and universities, whether private or public, to return to in-person operations. There are reflections of certain private-public governance distinctions in shaping who makes these tough calls, but in very general terms private and public have shown considerable similarities regarding closing and opening decisions and their financial impact, whereas other policies have shown a considerable mix of private-public similarities and differences.

**VIETNAM (Quang Chau)**

Private/Total enrollment: 319,760/2,466,643 (13%)

Not among the first countries to command social distancing (April 1, 2020), Vietnam quickly became one of the first that proudly ended it (April 23, 2020). Three months after initial criticisms about the government's delayed responses to stop COVID's spreading from the neighboring superpower, the country came to revel in its "new normal." The degree of satisfaction varies, however, by the different levels of success achieved in higher education's different sectors.

Although higher education overall—whether because of its comparative academic and administrative autonomy, or more mature and self-motivated students—has generally fared much better than schools, COVID's adverse impacts on higher education system have been obviously numerous. Given the great general differences between Vietnam's higher education sectors, it is not surprising that the adverse impacts have themselves been different across the sectors, as seen in other countries analyzed in this paper.

Nor is it surprising that the immediate revenue disruption impact has been worse in PHE, which is exclusively for-profit and almost entirely dependent on private income. Postponed offline classes made cash payment—a common payment method in Vietnam—impossible. Furthermore, auxiliary services—for instance canteens, dormitories, language centers—were discontinued altogether.

However, private universities have showed greater flexibility than public counterparts to cope with the pandemic. Financially, they discounted tuitions, generally by 20%, extended payment deadlines, and offered free internet data for students to take online learning. In contrast, bound by cumbersome financial regulations, public universities could offer only 5-10% discounts. In both sectors, universities have turned to reduce salary for tenured faculty and staff to offset their tuition losses, but such actions were made more easily and sharply at privates, where unions are neither obligatory nor strong, a globally common private-public distinction.

In a similar vein, private universities were swifter than public ones to adopt online learning platforms. Two weeks into official, approximately 76% of private versus 43% of public universities were online. On the other hand, if PHE can claim a flexibility edge, another globally common private-public contrast provides a more benign possible explanation for the public lag: its heavy concentration of technology universities, academies of arts, and teacher training colleges—many of whose programs require laboratory experiments, physical practice, or apprenticeships, and thus cannot operate online. This quite contrasts to PHE's concentration of high demand and low-investment programs in Vietnam's mostly non-elite PHE.

Apart from private-public differences, private universities themselves have had differential success coping with the pandemic. At the bottom of the spectrum are demand-absorbing institutions that have no permanent campus and instead operate largely on rented facilities. Unable to be terminated abruptly, these rental contracts soon became burdensome when the university needed to divert investments to online education platforms. Worse, here is where dropping out has likely been most common, since many low-SES students are at demand-absorbers, and struggle with tuition; in turn, tuition loss is a hard blow to these institutions.

In contrast, and despite higher tuition, international private universities (awarding only or mostly foreign degrees) and some semi-elite and product-oriented private universities have proven themselves to be resilient in coping with COVID. The international universities, with their institutionalized developed country linkages, were best equipped to switch to online technology for teaching. Although having initial difficulties switching to online education, the domestic semi-elite and product-oriented institutions soon showed their commitment to quality – e.g., they both offered professional training for faculty unfamiliar with online teaching and maintained close supervision of online class schedule and attendance. While common among demand-absorbing institutions, layoffs and salary reduction have been exceptional in semi-elite and product-oriented PHE. On the other hand, where business-oriented private universities belong to multi-level education conglomerates, they had to shoulder losses incurred by lower education siblings. For example, as kindergartens could not switch to online education and thus had practically no revenue, the conglomerate had to divert revenues from their universities.

Further advantages may well accrue to the favored side of PHE from blows to the international student industry. While most Vietnamese international students are still overseas and will likely continue their study, those who had planned to study abroad will most likely enroll in a home university. One prediction is that the international private and other good private universities with international transfer options will be preferred options. Although top public universities may be attractive for their quality and domestic status, they set a high entrance bar through a competitive exam for which these students have not prepared.

While seriously challenging all Vietnamese higher education, COVID reveals how several key characteristics of and within PHE—including institutional and SES differentiation, flexible and profession management, business acumen, and internationalism—make for differential impact between private and public and quite notably within the private terrain itself.