

What Comes After Massification? Shrinking Systems and “Empty Degrees”

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For six decades, massification defined the modern university: the shift from elite to mass higher education, built on the assumption that more students would always come. That assumption is now breaking. Systems serving aging populations face enrollment declines and institutional consolidation; systems serving large youth cohorts continue to expand, often without gains in quality or employment outcomes.

Across the Global North and East Asia, plummeting birth rates have turned limitless expansion into structural contraction. Russia offers a clear example: its higher education enrollments declined by roughly 40 percent over the past decade, followed by waves of institutional mergers and closures.

South Korea, Taiwan, and Japan all confront shrinking cohorts and excess capacity. In South Korea, parliament passed legislation in 2025 empowering the government to restructure or close financially distressed private universities. The Ministry of Education has identified more than 80 insolvent “zombie universities.” In Japan, private universities reduced enrollment quotas for the first time in more than 20 years.

The United States faces the same demographic forces with significant regional variation. The “demographic cliff” of high school graduates, concentrated in the Northeast and Midwest, has accelerated mergers and closures among tuition-dependent colleges. At the same time, the job market for recent computer science graduates has weakened, undercutting a central promise of recent enrollment growth.

The United Kingdom illustrates how demography interacts with policy in a fee-dependent system. A frozen tuition cap and falling real public spending per student have eroded funding just as the domestic 18-year-old cohort has stopped growing. Sector analysts are now discussing the prospect of multiple institutional failures and warning that existing regulatory frameworks are ill-equipped for systemic crisis.

While many systems in the Global North manage contraction, large parts of the Global South confront rapid enrollment growth weakly connected to labor market realities. The global student population has more than doubled since 2000 to 264 million, driven largely by massification in developing economies. Today, China and India alone account for more than one-third of all tertiary enrollments globally.

India’s higher education system has expanded rapidly, from fewer than nine million enrollments in the early 2000s to more than 44 million today, and expansion continues as participation rates remain relatively low. The system produces an estimated

1.5 million engineering graduates annually. Yet industry reports suggest only 10 to 15 percent secure roles meeting prevailing standards in high-skill sectors.

China has built the world’s largest higher education system, enrolling more than 48 million students and graduating over 10 million annually. This large and relatively unconstrained supply has contributed to a severe graduate unemployment crisis. China’s trajectory hints at the future for many expanding systems. After two decades of rapid growth, fertility has fallen sharply, and the number of college-age students will begin to decline in the 2030s, pushing the system from massification toward consolidation.

In parts of the Middle East, higher education expansion has followed yet another path: rapid capacity growth driven by state investment and demographic pressure, often decoupled from private-sector job creation. Gulf systems such as Saudi Arabia and the United Arab Emirates have built large public universities and attracted branch campuses, while countries like Egypt, Jordan, and Iran face rising graduate underemployment as degree production outpaces labor market absorption, particularly outside the public sector.

Africa confronts the greatest demographic pressure. The tertiary-age population is projected to grow by a quarter over the next decade, fueling demand that existing systems cannot meet. Cross-border enrollment has surged, and online programs have expanded, but completion rates remain low and employer recognition uneven. In South Africa, nearly half of 18- to 24-year-olds are in neither education nor employment.

Two logics operate in parallel. One sector, concentrated in aging societies, manages decline through consolidation, cost control, and international student recruitment, seeking to preserve research capacity as domestic numbers fall. The other, centered in younger societies, manages growth through a combination of public expansion and often weakly regulated private provision. Here, the problem is not capacity but quality and relevance (i.e., low completion rates and limited labor market absorption). Cross-border education and new credentials proliferate, but they frequently reproduce or amplify existing inequalities rather than resolve them.

National trajectories now depend on three interacting forces: fertility rates, migration flows, and labor market capacity. Emerging higher education systems must navigate a world where demographic trends vary dramatically, where degrees no longer guarantee employment, and where the social compact between higher education and societies requires renegotiation.