

Mapping Higher Education in Asia

Hamish Coates, Angel Calderon, Muhammad Hali Aprimadya, Soth Meas and Kenneth Moore

Asia has emerged as the epicenter of global higher education transformation. The Mapping Higher Education in Asia briefing situates higher education within broader political, economic, social, and technological environments, revealing a region characterized by immense scale, rapid growth, deep diversity, and persistent structural gaps. The study underscores that Asia is no longer peripheral to global higher education but central to its present and future configurations.

Over the past four decades, Asia has overtaken Europe and North America in student enrollments, creating the largest higher education ecosystem in the world. The [Mapping Higher Education in Asia report](#) estimates that, by 2023, there were around 12,600 higher education institutions across the sampled territories, enrolling more than 90 million students. This expansion has been accompanied by significant research growth. Asia's scientific output has surged, particularly in China, which now produces approximately one quarter of global publications. Together with India, Japan, and South Korea, China forms a dominant research bloc that is reshaping global knowledge production patterns.

Yet the report emphasizes a paradox: while Asia leads in scale and growth, it remains underrepresented in global data systems and analytical frameworks. Much of the available data are produced outside the region, highlighting the need for Asia to develop its own indicators, benchmarks, and evidence.

Diversity without a Single Model

One of the briefing's central insights is the difficulty in defining "Asia" as a coherent higher education region. The report adopts a pragmatic approach, selecting 16 territories that represent distinct historical trajectories, cultural contexts, and levels of development. This approach reveals a heterogeneous region where no single education model dominates. Systems range from highly centralized, state-led configurations to market-driven arrangements. Importantly, the report cautions against overreliance on global rankings and conventional benchmarks. While rankings have shaped institutional aspirations and international visibility, they capture only a partial view of the region's complex and evolving dynamics.

Politics, Governance, and the Limits of Determinism

The relationship between political systems and higher education outcomes proves more ambiguous than often assumed. The 16 territories encompass diverse governance, from liberal democracies to single-party states and military regimes. There is no straightforward correlation between politics and institutional performance. Indicators such as corruption control,

government effectiveness, press freedom, and academic freedom vary significantly. However, the historical relationship between governance and education development appears weak and contingent. These findings challenge deterministic assumptions about political influence on universities, suggesting more complex dynamics.

Economic Foundations

Economic expansion underpins much of Asia's higher education growth. Despite global disruptions, most sampled economies are expanding, contributing to increased demand for tertiary education and research. At the same time, the region's economic diversity is striking. Advanced economies such as Japan and Singapore are service-dominated, while others, including Cambodia and Indonesia, retain strong industrial bases. These structural differences shape national higher education priorities, from innovation-driven research systems to workforce-oriented teaching models.

However, public investment in education presents a more mixed picture. Education spending as a share of GDP has stagnated or declined in many countries. At the tertiary level, average public expenditure hovers around 0.5 percent of GDP, well below high-income countries.

Demographic Transitions and the Future Student Base

Demographic dynamics represent one of the most significant forces shaping Asia's higher education systems. The region is simultaneously youthful and aging. Pakistan, Bangladesh, and Cambodia have growing youth populations, while Japan, South Korea, and China face declining birthrates.

The implications are profound. The traditional 18- to 23-year-old cohort is projected to peak and then decline over the next two decades. Systems will need to adapt, either by expanding international recruitment or by shifting to lifelong learning. The "lifelong learner" cohort (i.e., those aged 24–55) is expanding across most of the region and globally, suggesting that universities will need to redesign curricula, delivery modes, and

support services to cater to more diverse and nontraditional learners.

Expanding Participation, Persistent Inequality

While education access has improved, disparities remain stark. Participation varies widely (from around 10 percent in Pakistan to over 100 percent in South Korea). Graduation and progression differ significantly, reflecting uneven institutional capacity and resource allocation. While public universities remain dominant in enrollment, about 65 percent of institutions are private, highlighting how market-based provision is meeting demand. These patterns point to a dual system in many countries: mass expansion driven by private providers alongside elite public institutions focused on research and prestige.

System-Level Priorities

Asia's research landscape is marked by both concentration and diversification. The "research powerhouses" (i.e., China, Japan, Singapore, and South Korea) exhibit high levels of R&D investment, researcher density, and global output. "Rising" systems, including India, Vietnam, and Thailand, are rapidly increasing their research activity. A third group has limited research capacity but demonstrates latent potential. Research output has grown dramatically across the region, with China and India showing rapid acceleration. Quality indicators present a more nuanced picture, with several smaller systems (such as Singapore) performing on citation impact and international collaboration.

Internationalization is a critical dimension of higher education, yet Asia remains inward-oriented. In most countries, international students are less than one percent of enrollments.

Outbound mobility is growing, particularly from India, Pakistan, and Bangladesh, underscoring ongoing reliance on prestigious Western systems. At the same time, several countries (notably China, Malaysia, Singapore, and South Korea) are emerging as regional hubs, attracting increasing numbers of inbound students. The report identifies the untapped potential for intra-Asian mobility.

A recurring theme is the lack of good data in Asia. Basic indicators are often incomplete or inconsistent. Moreover, many common indicators are designed outside the region and fail to capture Asia-specific characteristics, such as rapid development cycles, cultural diversity, and hybrid institutional models.

Toward a New Global Academic Order

Asia is poised to play a defining role in global higher education. Its scale, growth, and increasing capacity position it as a driver of innovation and talent development. This transformation raises critical questions for academics and policymakers worldwide. How will demographic change reshape demand? Where will graduates work? How will Asia's systems interact with those in Africa and other emerging regions? Addressing these questions requires sustained research, improved data, and deeper collaboration across institutions and countries. Asia can no longer be viewed as a collection of national systems but must rather be recognized as an interconnected region with global influence.

For policymakers and university leaders, the message is clear: understanding Asia is no longer optional. As the center of gravity in higher education continues to shift, the region will shape not only its own future but also the direction of global scholarship, mobility, and institutional development.

Hamish Coates is a professor of public policy affiliated with the Australian National University and Tsinghua University and the director of the Higher Education Futures Lab. Email: hamish.coates@anu.edu.au.

Angel Calderon is director of strategic insights at RMIT University, Australia. Email: angel.calderon@rmit.edu.au.

Muhammad Hali Aprimadya is a lecturer in public policy at Flinders University, Australia. Email: hali.aprimadya@anu.edu.au.

Soth Meas is a doctoral student at the Australian National University. Email: soth.meas@anu.edu.au.

Kenneth Moore is cofounder and strategic advisor at AptoNow. Email: kenneth.moore@fulbrightmail.org