

The World ^{of} Higher Education

YEAR IN REVIEW 2025

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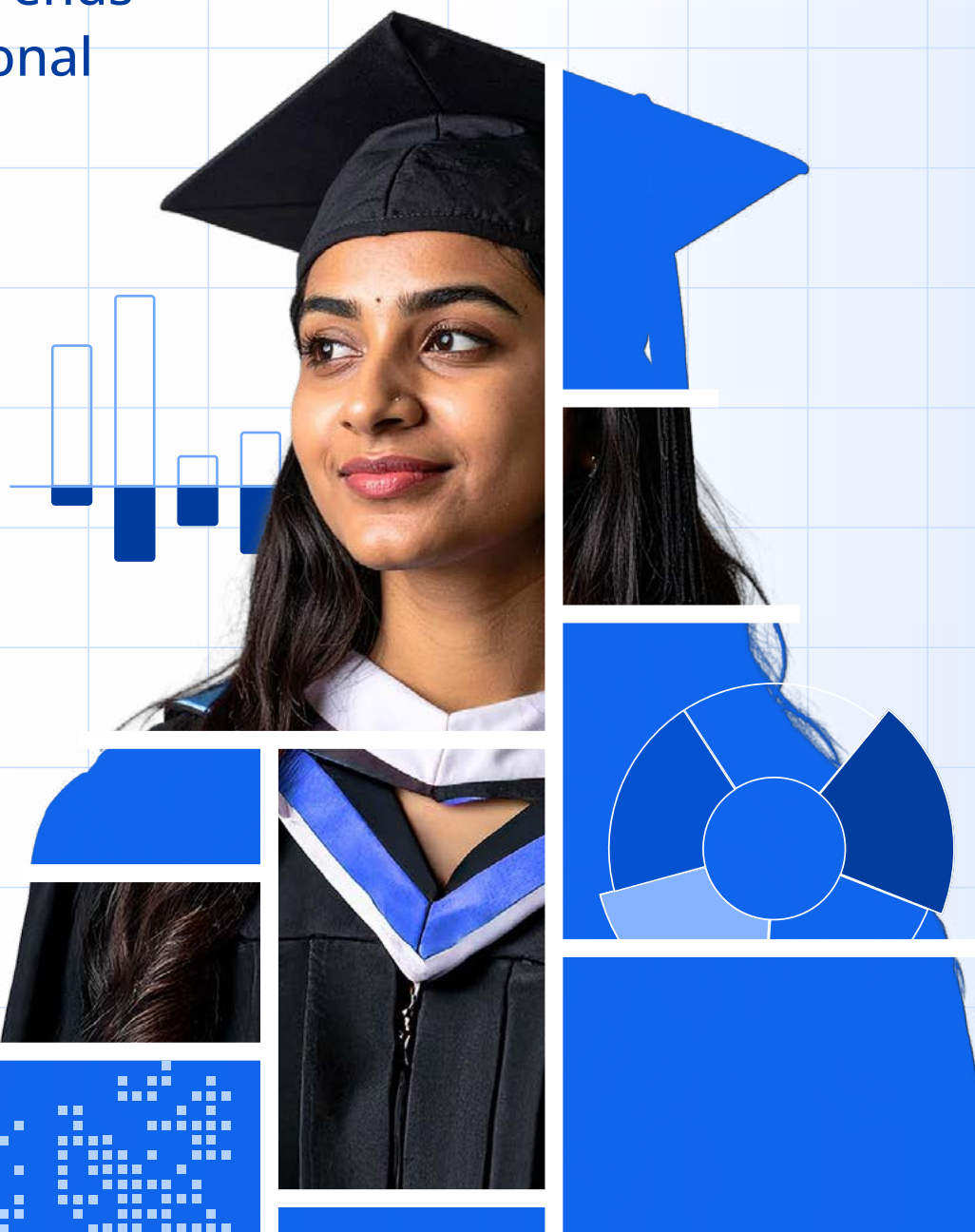




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Acknowledgements

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Alex Usher

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Table of Contents

ACKNOWLEDGEMENTS.....	V
ABOUT THIS SERIES	1
INTRODUCTION.....	3
THE YEAR'S STORIES	6
Reactions to Trump.....	7
Varieties of Cutbacks.....	7
Tuition Fees	9
Student Aid	10
Enrolments & Demographics.....	11
Research Policy	11
Quantity vs. Quality.....	12
Private Universities.....	13
Transnational Education.....	14
International Student Flows	15
Gender.....	16
Language Politics	16
Student Politics	17
Humanities Watch.....	18
Graduate Outcomes.....	18
Higher Ed in Wartime	19
Artificial Intelligence	20
Academic Corruption	21
Criminal Activity	21
Student Housing	22
Violence and Tragedy	22
NATIONAL SUMMARIES.....	23
The United States of America	24
China	26
India	28
Argentina	30

Australia.....	31
Brazil	32
Canada	33
Colombia.....	35
France	36
Germany.....	37
Indonesia	38
Iran	39
Italy	40
Japan	41
Kenya	42
Malaysia.....	43
Mexico.....	44
Nigeria.....	45
Pakistan.....	46
Republic of Korea.....	47
Russian Federation.....	48
South Africa	49
Spain	50
Türkiye	51
United Kingdom	52
THREE POLICY MOVERS	54
NOTABLE BOOKS.....	55
THE WORLD OF HIGHER EDUCATION IN DATA.....	56
THE YEAR'S BEST ARCHITECTURE	65
STRATEGIC PLANNING IN 2025.....	67
ENDNOTES	74

About This Series

Despite taking up something on the order of 1% of global GDP and educating 3-4% of the world's population in any given year, higher education is, perhaps surprisingly, a field where most of the analytical work is resoundingly national in focus. The purpose of this publication – which can be thought of as a relative to HESA's long-running *The World of Higher Education* podcast – is to try to provide a genuinely global and transnational way of thinking about this ever-changing sector.

At a global level, higher education analysis generally comes in two forms. First, there is the instant analysis provided by higher education journalism through outlets like the Times Higher Education (THE) and University World News. This work is essential, but the constraints of weekly deadlines do not leave much room for trend analysis. Then, there is the scholarly work done in top journals as *Higher Education*, the *Journal of Higher Education*, *Studies in Higher Education* and the like. This type of analysis can take years and rarely tends to cover issues that are fairly narrow both in terms of topics and/or geography. There are some good attempts made at analysis of the “near past”: Boston College's *International Higher Education* has done sterling work for decades providing updates on topics around the world. And more recently, the Global Observatory on Higher Education Change has started to publish annual reviews of what is “new” in higher education. But while both are impressive in their geographic coverage, neither outlet puts much emphasis on statistical analysis, and nor can they really compete with journalistic efforts for immediacy.

This report, *The World of Higher Education – Year in Review 2025* is the first of what is hopefully a long series of publications intended to cover the gap between these various types of publications. It is fiercely about “now”; it recounts in detail the challenges that the world's higher education systems have faced this year, but it also

includes deeper statistical and textual analyses of national and institutional issues to try to understand where higher education is headed over the next few years.

Superficially, this publication may bear a certain resemblance to HESA's existing *State of Post-Secondary Education in Canada*, an almanac that our organization has published for the last eight years. The chief difference is that *Year in Review* is substantially more narrative and less statistically oriented in nature. In part, this reflects the difficulty of obtaining genuinely usable and comparable statistics in the field of higher education. It also reflects that, at the global level, making sense of data requires an understanding of the many different socio-political contexts in which higher education exists. Hence the document before you.

This document is composed of four main sections:

The first, **The Year's Stories**, is devoted to the year's top issues produced from a global perspective. These represent short summaries of how specific policy files, such as student assistance, tuition fees, research policies, and financing, were dealt with around the world. It also carries global summaries of issues that are less policy than circumstance, like academic corruption, housing crises, and higher education in war zones.

The second is a series of twenty-five **National Summaries** which each provide a small précis of a country's current post-secondary situation. These summaries both analyze key statistical trends over time and provide a précis of the key issues and events that drove that country's higher education system in 2025. The countries were chosen on the basis of size, data availability, and the degree to which substantial issues arose in the past 12 months. Included are: Argentina, Australia, Brazil, Canada, China, Colombia, France, Germany, India,



Indonesia, Iran, Italy, Japan, Kenya, Malaysia, Mexico, Nigeria, Pakistan, the Republic of Korea, Russia, South Africa, Spain, Türkiye, the United Kingdom, and the United States. Two countries with major higher education system were excluded due to lack of data: Egypt and Saudi Arabia. Nigeria has a similar lack of data but was nevertheless included because the policy debates were notable enough to warrant inclusion. A separate, short spotlight on three countries not included in this section but who have nevertheless made impressive strides in the past year is also included on page 54.

The third section is **The World of Higher Education in Data**, which provides an overall statistical portrait of trends in higher education participation and finance going back to 2006. We do this not through the use of UNESCO data – which can be surprisingly sporadic and often not up to date – but instead through the use of national sources of data wherever possible. For obvious reasons, these figures are not always 100% compatible, so our focus tends to be on change over time within individual countries. We look specifically at changes in enrolment and changes in public expenditures over the past twenty years, and take small detours into special topics such as African higher education and the continuing evolution of private higher education in Europe. The countries included here are the same as in the **National Summaries** section.

The fourth major section is on **Strategic Plans in 2025**.

This section provides a general focus on the plans of global top-200 universities on the grounds that these institutions – which tend to act as models for less prestigious institutions – actually represent the leading edge of institutional thinking about what constitutes a “good” university both in terms of strategic outlook and the kinds of initiatives they undertake. It also takes a more specific look at the subset of roughly two dozen institutions in the top-200 which have issued new plans in the past twelve months in order to see what kinds of themes are receiving greater or lesser attention than in the recent past. In future years, we hope to add more information on activities at top universities, and in particular, their finances.

In addition to all of this are smaller pieces on the top higher education books from 2025 and the year’s best university architecture. In short, what we hope to present in this report is a recap of the year which is truly global – not just in geographic terms, but in thematic ones as well – and which provides a summary which genuinely shows the position of this amazing sector at the end of 2025.

Thank you for reading. The HESA team would love your feedback on what you love most and least about Year in Review, and any suggestions for future issues – send us a note at YIR@higheredstrategy.com. We’ll see you back here again in 2026.



Introduction

“The old world is dying, and the new world struggles to be born: now is the time of monsters.”

– Antonio Gramsci

2025 was a year of monsters.

The most obvious monster was President Donald Trump and the fascist troupe that accompanied him to occupy Washington, DC in January. Immediately, Trump and his allies in both federal and state governments began a ferocious series of attacks on international students, academic freedom, disciplines (history in particular), institutions, and science itself, whose full effect may take years to understand and decades to reverse. The spectacle of the American government immolating one of the country's greatest resources left the rest of the world staring in appalled fascination: we have genuinely seen nothing like this since the 1930s. The American saga is without question the story of the year – probably the decade – in higher education.

But there were other monsters, too: the principal one being neglect. What seems to unite most of the developed world right now is an assumption that institutions run on autopilot and need little attention because they will always exist and always provide services. In that sense, what is happening to higher education institutions is a bit like what is happening to democracies themselves: the foundations are in need of repair, but the expense and effort to do so are seemingly beyond the imagination of governments to tackle.

Some of the current neglect is for good reason. Since 2022, if not earlier, the world has returned to a much more dangerous, cold war-like state. This is justifiably taking up much of the attention of national deci-

sion-makers. So, too, is climate change in all its many manifestations. In many parts of the world, the costs of supporting an aging population provides competition for public dollars, and in some countries, the debt burden from COVID-19 and/or many years of public profligacy has shrunk the funds available to support all public expenditures, not just higher education. In country after country, what we see is not just a pattern of stagnant investment, but one where politicians actively blame universities themselves for their parlous state or simply shrug and tell them to “work with austerity”. And few outside the sector seem to care very much. Universities feel alone.

The third monster in much of the world is stagnant or declining enrolment. In this volume – which tries to cover the 25 largest higher education systems in the world – what we see is that in almost half of these countries, enrolment is stagnant or falling. In most places this is due to demographic changes, but in a few countries – especially Türkiye and Pakistan – it seems to be the result of an overbuilt higher education system that students and/or governments can no longer afford to support in their present state and/or rate of return.

Which brings us to the final monster, which is that of technological change and the spectre of technological obsolescence. Strictly speaking, this is not a new issue: universities are always grappling with technological change and how to structure their offerings to meet them. This current wave, though, seems somewhat different, primarily because the technology itself (artificial intelli-



gence) seems simultaneously world-changing and not-yet-ready-for-prime-time, and because its arrival has coincided with a global economic slowdown that is itself creating problems in the labour market. Students and their parents are worried about their futures and are demanding greater certainty of payoff for the time and money spent in higher education – as indeed are many governments. Much will be resolved as new technologies inch towards maturity but, in the meantime, the challenge of dealing with new technologies is contributing to a sense of fragility in the sector.

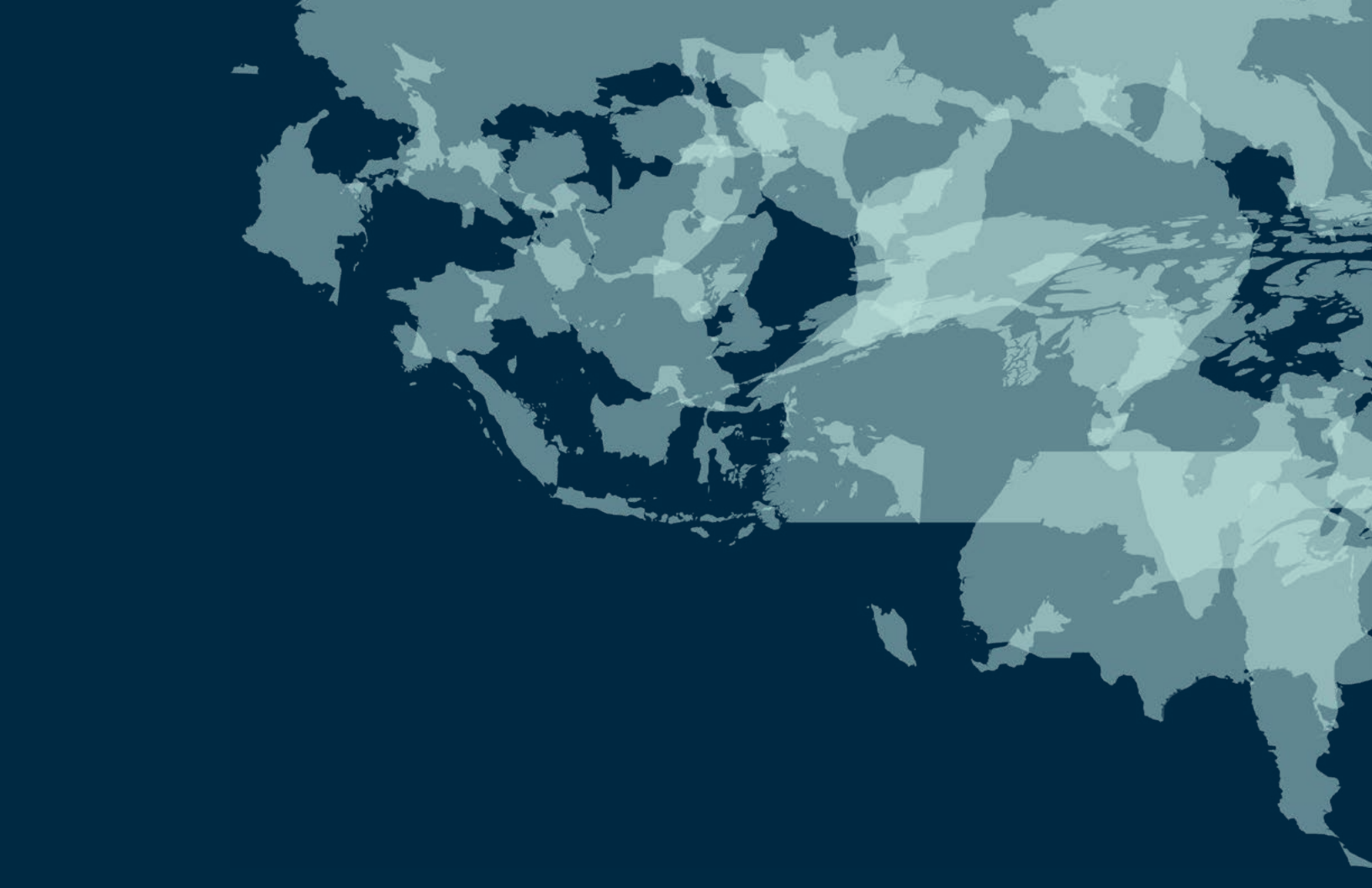
It is important to remember, however, that while the four monsters of fascism, neglect, demography, and technological change are all global in scope, their impact is decidedly variable across countries. In particular, the phenomenon of neglect is not universal; many countries still believe in higher education as a means of modernization and are pouring money into the sector in order to speed up economic and social development. Türkiye and South Korea are pouring money into their universities despite declining student numbers. China is justly proud of the huge strides its top institutions have taken over the past two decades. India's public investment in higher education may have stalled, but private institutions are proliferating, and a few are gaining prestige as centres of research. Brazil has turned to the private sector and to online education to swell its student numbers over the 10-million mark. Across the Arab world, there are many instances of growing enrolment and policy innovation. There are, in short, places that see higher education as a solution, not a problem.

However, even in such countries, signs of decay are evident. Belief in higher education might be an antidote to neglect, but it cannot stave off the effects of demography. Pride in higher education achievements in India and China are not translating into greater financial support for the sector. Growth in African higher education is significantly lower than was predicted just a few years ago, and even in places where it is not (e.g. Kenya), governments have difficulty keeping up financially with demand. In the short-term, that creates financial challenges for institutions that are every bit as challenging as those plaguing rich-world countries such as Canada, Germany, and the United Kingdom – perhaps even more so.

Global higher education will survive all of this. It always does. But while the necessity of structural changes in the university models of finance and program delivery seem ever more urgent, academia's innate conservatism, inertia, and justifiable pride in past achievements makes rapid change difficult. Higher education systems are fracturing under the various pressures being put on them. Nothing has cracked yet, but in some parts of the world, we seem to be getting very close to a reckoning.

2026 will be very interesting.





The Year's Stories



Reactions to Trump

As scientific granting agencies and top research universities in the United States were attacked by the Trump administration (see UNITED STATES OF AMERICA), a large number of countries expressed interest in trying to profit from the chaos. The main route for doing this was through programs which would help countries poach American scientific talent. Australia,¹ Canada,² the Czech Republic,³ the European Union,⁴ France,⁵ Germany,⁶ Japan,⁷ Norway,⁸ and the United Kingdom⁹ all either set up special funds to attract scientists from American universities or promised to do so in the near future. These moves were often described as luring “global” talents rather than specifically American ones, but the meaning was unmistakable. These moves were in many cases laughable: it is one thing to provide funds to employ top talent, but it is another thing completely to try to maintain a research and laboratory ecosystem that talented scientists want to work in. While there were a few individual cases of American academics leaving for pastures new (e.g. Esther Duflo and Abhijit Banerjee to Switzerland)¹⁰, by year’s end there was little sign of any mass migration of American scientists, except perhaps to China (see CHINA).

Changes to America’s student visa system also caused a fair bit of press reaction in other countries as students wondered how they would be impacted. But the moment when the entire global education media ecosystem came together was when Trump decided to declare war on Harvard by revoking its right to admit foreign students.¹¹ Though the measure was quickly overturned in the courts¹², it sent a shock wave right around the world as the press in countries such as Ethiopia,¹³ Iceland,¹⁴ India,¹⁵ Kazakhstan,¹⁶ Malaysia,¹⁷ and Vietnam¹⁸ all ran breathless stories about what might happen to “their” Harvard or Harvard-bound students. Harvard, which suddenly became an unlikely symbol of resistance to Trump at home, thus became a “local” story in more or less every country in the world.

As the year went on and the Trump administration lost court case after court case with respect to withholding research funds and restricting international students, talk of “taking advantage” of the American predicament to poach students and professors from the United States began to fade, particularly as evidence emerged that international students were not being dissuaded from attending US universities at anything like the rate initially expected.¹⁹ This could change in the future, of course, and other countries remain alert to chances to strengthen their institutions at the expense of American ones. But for the moment, the effects are more restricted than might have been imagined early in the year. Varieties of Cutbacks



Varieties of Cutbacks

Trump aside, the leading story in global higher education was one of cutbacks and funding shortfalls. It might seem like 2025’s theme was “the year the money ran out” – but a closer examination of the headlines reveals a far more complex reality.

In the United States, cuts came in two main forms: cuts to existing or future federal research funds¹ (often on ideological grounds, such as the response to so-called “wokeness”²), and targeted withholding of funds and “fines” directed at specific institutions³ that the Trump administration chose to bully. These measures affected private universities disproportionately and were driven more by ideology than fiscal constraint. At the level of individual states, which have the primary responsibility for funding public higher education, the picture was more mixed: cuts in some states were balanced by increases in others, with so-called “blue” (Democratic) states being as likely to cut as “red” (Republican) ones. Still, many



institutions announced cuts to programs and staffing levels,⁴ either due to reductions in federal funding or declining revenues from international student arrivals.⁵

Elsewhere, ideology was much less prevalent in cuts. In Canada,^{6, 7} Australia,⁸ and the United Kingdom^{9, 10} – all run by centre-left governments broadly sympathetic to education – widespread institutional cuts were down to some combination of stagnant public funding and declining income from international students. These pressures led to widespread program and staff cuts at the institutional level. In Canada, the impact was concentrated in Ontario's college sector;¹¹ in Australia, cuts were particularly severe at the University of Technology Sydney,¹² and a particularly clumsy attempt at institutional transformation provoked a crisis leading to the resignation of the vice-chancellor of Australian National University.¹³

In Argentina, the anti-inflationary tactics of President Javier Milei (by no means a friend to “woke” intellectuals) reduced the higher education budget in real terms by roughly a third.¹⁴ Unlike the United States, however, these cuts were not accompanied by targeted, ideological attacks on individual institutions.¹⁵ Eventually, Congress demanded higher spending on universities.¹⁶ President Milei vetoed the measure,¹⁷ but the veto was overturned by Congress,¹⁸ which the President refused to accept until Congress explained how to pay for the measure.¹⁹ What happens next remains uncertain.

Ideology did appear to play a significant role in the Netherlands, where a centre-right government agenda lead to more than a billion euro reduction in funding,²⁰ though even here the loss of international students was also a factor.²¹ The fall of the governing coalition in June brought no respite – as the caretaker government's fall budget introduced some additional cuts to the sector.²² The October election's rejection of the far-right leaves open the possibility of a brighter financial future for universities, but specifics remain unclear.²³

In France, the government imposed a €1.5 billion cut on the higher education sector in the spring,²⁴ at a time when more than 50% of universities were already in deficit.²⁵ Falling government transfers were a major factor in creating a crisis. However, unlike other OECD countries in budget crises, France has seen a rise in domestic student numbers in recent years,²⁶ which has further exacerbated the problem. Although this may appear superficially similar to cases in the Anglo-sphere, the underlying causes are fundamentally different.

Budget crises were also common in countries with growing student numbers and rickety government finances. In Brazil, federal universities appeared to be at risk in the spring when the government – apparently facing a cash crisis – attempted to replace regular monthly transfers with a single large annual payment.²⁷ This left many institutions scrambling to figure out how to pay their employees and suppliers in the meantime. Eventually, the Lula

government reversed itself and added a few hundred million more reais to the budget just to show that there were no hard feelings.²⁸

And then finally, there was the case of Kenya (see KENYA). In some ways, what has happened there resembles an extreme version of France and Pakistan – a country packing students into universities without providing the resources to support them.²⁹ Officials claimed the funding formula was to blame, but this simply is not true – no distribution formula can make institutions whole if the total amount of money being distributed is insufficient. Like South Africa before it, the Kenyan government has seemed content to let institutions shoulder the blame for the whole mess.³⁰

In two countries, the crisis was compounded by a combination of falling government expenditures and declining enrolments. In Iran, a collapsing university system is the product partly of mismanagement, but also more directly the product of an economic depression caused by foreign sanctions.³¹ Meanwhile, in Pakistan, a sweeping financial crisis unfolded province by province: in June, the Sindh government announced it could not comply with a court order to provide salary top-ups to professors with advanced degrees;³² in August, the country's top university Quaid-e-Azam University received a Rs 2 billion (roughly USD \$7 million) bailout;³³ and, by September, the government of Khyber Pakhtunkhwa suspended university recruitment altogether because of a financial crisis.³⁴



All in all, the global sector is far from those halcyon days of the mid-2000s when higher education funding reliably rose every year. Regardless of the cause, times are tough in higher education right now.



Tuition Fees

A host of countries have experimented with tuition fees this year, but there has been nothing like a clear global trend in policy direction. On the one hand, several countries are seeking to reduce fees for students. Namibia, for instance, announced plans to introduce a completely free tuition system¹ in its public higher education institutions (with no clarity on what this means for the private sector).² The state of Sarawak in Malaysia also launched a full free-tuition program for most programs across its state universities,³ though not its federal ones. Kenya moved to reduce tuition fees by up to 50% across its public

system.⁴ Ghana has introduced a “no-stress fee free” policy under which the Student Loan Fund pays first-year fees on a student’s behalf if they are attending a public university or college.⁵ A similar policy was, of course, implemented in New Zealand by Jacinda Ardern’s Labour government, but proved not to be very effective at promoting access.⁶ The principal danger here is overcrowding in public universities as students switch from the private sector to the public.

So much for the places where fees are going down: elsewhere they are heading in the other direction, particularly in Europe. Ireland allowed a fee reduction of €1000/year that was introduced during COVID-19 to lapse⁷. In Belgium, the government of Wallonie-Bruxelles, under significant pressure to cut its budget deficit, increased tuition fees (known locally as “minerval”) by about 40%, to about €1200 for the 2026-27 year. The Swiss government, similarly trying to cut overall public spending⁸ is looking to double tuition fees in 2026-27 to about SFR2500/year⁹ (tuition fees for international students were tripled earlier in 2025 with basically no enrolment effect).¹⁰

A more complicated case arose in Bulgaria, where the wording of a new Higher Education Act tied tuition fees to program subsidies.¹¹ Since institutional subsidies had been rising in recent years, this meant a very sudden and very large increase in fees. Somehow this mistake was not noticed until universities started posting their tuition rates in accor-

dance with the new policy, at which point there was a large uproar.¹² Government quickly reduced fees by 40% from their new level,¹³ but this still left students paying more than they did before the increase.

There were also significant instances of tuition increases in Asia, but the role of government was unusually less directive. In South Korea, for instance, 70% of institutions increased tuition, up sharply from just 15% the previous year, although the actual size of the increase was fairly small (just 4%).¹⁴ In Iran, the semi-private (it’s complicated) Islamic Azad University, which enrolls roughly a quarter of the country’s student body, reportedly increased tuition in some key fields by as much as six-fold.¹⁵ In China, the practice among top universities of raising tuition fees to make up for stagnant government funds suddenly came under fire, with some questioning whether this might create an affordability gap for poorer students.¹⁶

In sum, the countries likeliest to reduce or remove tuition in 2025 were those that are poor and already have rapidly growing student populations. All seem to have decided that at their current stage of development, access is more important than quality. This is, of course, legitimate but only if government funding alone can keep pace with demand; otherwise, policies to subsidise tuition mainly ends up as a subsidy to the urban middle class. Richer countries, on the other hand, seem to be finding it difficult to maintain existing high levels of subsidy to universities, either because of sclerotic economic



2



growth, or the pressures of population aging – or both – and this, in turn, is raising pressure to turn to students for larger contributions. In moderation, this probably makes sense, especially where tuition is low to begin with (e.g. Belgium), but the politics of it are challenging.



Student assistance programs shifted significantly this year in a number of countries. Perhaps the most significant change occurred in Chile, where two existing student aid programs were replaced by a new system called the *Fondo para la Educación Superior* (FES), which is arguably unique in the global landscape. This new system replaces the existing system of student loans with a graduate tax: under FES, students who obtain funds will be required to pay a contribution of 10% of marginal income over about USD\$515/week for a period of twenty years.¹ In effect, this model resembles the Yale Tuition Postponement Plan², which has never been replicated at a national level because of the heavy burden placed on high income earners. A study by researchers at University College London analyzed the plan and suggested that FES could be largely self-sustaining – but only because high-earning graduates in professional fields will contribute substantially more than they receive,

thus creating a question of potential self-selection out of the program.³

In Colombia, student aid policy took a different turn. The government previously attempted to abolish interest on student loans by sticking universities with the bill for interest. When the Supreme Court overturned this manoeuvre,⁴ Congress passed a law mandating ICETEX (which mostly services students at private universities) to reduce interest rates, offer generous loan forgiveness, and adopt an income-contingent repayment system.⁵ However, in the meantime, the Government of Gustavo Petro had actually raised interest rates because it could no longer afford to subsidize them.⁶ The resulting instability in the federal loan system prompted at least on state government to start issuing its own student loans.⁷ Expect Colombia to stay in the news for a while on this contentious file.

Estonia moved to replace its “merit-based” grants system with one based primarily on income,⁸ making it the first post-Soviet country to shift away from merit as a basis for offering student aid. Meanwhile, in London, the Labour government has floated the idea of bringing back maintenance grants (abolished over a decade ago), but only for students in as-yet undefined “priority” programs of study, which would be financed by a widely reviled institutional tax on international students.⁹

Australia enacted a momentous change to its world-famous system of income-contingent loans. Like all

income-contingent loan systems, Australia's consists of an income threshold below which no payment is required, and a fixed repayment rate once the threshold is passed. However, unlike every other income-contingent system in the world, Australia's payment has hitherto been based on *total* income rather than marginal income above the threshold. This year, the Australian government aligned the system with the rest of the world, introducing a marginal payment requirement (17%) for all income over A\$67,000, by far the world's highest student loan repayment threshold.¹⁰

Over in Kazakhstan, student stipends were increased in value by 61%,¹¹ but the government also announced a reduction in the size of its well-known “Bolshak” scholarships which send students to top universities abroad.¹² Japan eased income caps on its student aid program allowing children from families with 3 or more children to attend free.¹³ Despite well-known budget pressures, the Government of Argentina re-started its “Progresar” scholarship system and also made it available to students at private universities; Ghana also opened its loan scheme to students at private universities.¹⁴ In the Philippines, the number of students covered by the country's free tuition program reached 2.3 million.¹⁵

In the United States, the early months of DOGE chaos did not impact student aid the way it did research funding, though mass firings did result in significant aid processing delays.¹⁶ The Administra-



tion's 2026 budget bill contained big cuts to both student loan and grant programs,¹⁷ however the bill did not command universal Republican support, leading to delays in budget passage and eventually a government shutdown.¹⁸



Enrolments & Demographics

In terms of raw numbers, the latest data from both China and India (see WORLD HIGHER EDUCATION IN DATA) suggest that these two countries are experiencing consistent and steady growth such that the pair might have over 33% of the world's students between them in the next few years. Indonesia remains on an upward trajectory, particularly concentrated in its public universities.

Although timely data from Africa is scarce, most indications are that growth is the rule there as well. Kenya reported that enrolments in 2024 rose by about 12%¹ to an all-time record high. In the middle east, Dubai reported growth of 20% in 2024-25² and further increases are anticipated as international student numbers continue to rise.³

In Europe, overall enrolment levels remained relatively stable; however, several countries experienced very

significant drops in first-year students admitted. Kosovo⁴ and Albania⁵, where the demographic situation resembles that of East Asia, were unsurprisingly hit with enrolment declines. More surprisingly, Portugal⁶ and Denmark⁷, which do not share a similar demographic picture, also reported some sharp single-year declines; though it is unclear whether these represent emerging trends or freak one-offs.

Across Asia, China and India aside, enrolments in many countries seemed to be in decline. Taiwan saw a drop in new enrolments of 7%⁸ and new projections suggest further decline in the coming years, making institutional closures a near-certainty.⁹ In South Korea, universities struggled to recruit sufficient domestic students and increasingly turned to massive recruitment of international students to save their bottom lines.¹⁰ Nevertheless, the continued declines prompted the country's parliament to pass a law allowing the government to more easily close so-called "zombie universities" with unsustainably low enrolment.¹¹ Japan, despite its shrinking youth population, has largely maintained its overall enrolment levels, but private universities are now experiencing falling numbers for the first time in a decade.¹² A similar phenomenon of declining private enrolments was also noted in Türkiye, though here the blame was put on high tuition fees rather than demographics.¹³

Perhaps the most curious enrolment story came from Pakistan, where reports claimed that student

enrolments had decreased by 13% in 2025.¹⁴ This seems puzzling, given the countries demographic profile resembles – superficially at least – those of countries which have seen very large increases in enrolment, but also because at the year's outset, Pakistani politicians were musing about the need to increase the number of institutions (see UNIVERSITIES: QUANTITY VS QUALITY). Various explanations have been proffered, including tuition increases and a shift to more vocational education,¹⁵ but none seem definitive. This is definitely a trend to watch in the years ahead.



Research Policy

The most consequential research stories this year were, of course, in the United States. While the funding cuts were significant (see VARIETIES OF CUTBACKS), the more profound shift was the way that the federal government sought to direct and control what was actually being researched. First, the government cut anything deemed "woke"; then, as Health Secretary Robert F. Kennedy Junior's agenda grew in influence, entire fields of science were thus put at risk as policy shifted on things like cancer research¹ and mRNA vaccine development.² But even this was





tame compared to the Executive Order *Improving Oversight of Federal Grantmaking*,³ which granted political appointees the authority to review and approve all federal research grants, ensuring alignment with Trump administration priorities.⁴ In the end, many of the cuts were revoked by the courts, nearly all of the money initially allocated was actually disbursed,⁵ and Congress chose mostly to protect health research expenditures in the budget process;⁶ however, the damage to many academic projects and careers had already been done, this was, of course, the entire point of the exercise.

Perhaps the most radical news in research funding (as opposed to policy) came from the technological powerhouse of Switzerland, where the federal government, ruled by a broad left-right coalition and not facing any significant fiscal pressure, decided to slash the budget of the Swiss National Science Foundation (SNSF) by 20%.⁷ That even the Swiss are rolling back scientific funding challenges the assumption that anti-science sentiment is just a manifestation of right-wing populism.

Both the United Kingdom and Australia appeared to be moving

toward research systems driven more by government priorities rather than by academic inquiry. The new head of UK Research and Innovation argued that institutions should focus on doing “fewer things but doing them well”⁸, while the President of Universities UK suggested that the UK government does not “want to be investing in areas of research where we don’t have the quality and we don’t have the scale ... you can’t have hobbyist research that’s unfunded going on in institutions. We can’t afford it.”⁹ In Australia, the Government’s Strategic Examination of Research and Development¹⁰ released a discussion paper¹¹ followed by a series of issue papers,¹² indicating that institutions may be required to specialize (not just in research but in program offerings as well), within a limited number of government-defined priority areas.¹³ What unites these two approaches is not just the notion that mission-driven research needs to take precedence over inquiry-driven research, but also that institutional specialization will somehow translate into greater national scientific success. This seems to be a profound misunderstanding of how modern networked science actually works.

In better news, the government of South Korea, which reduced funding to basic research quite significantly in the past couple of years, announced plans to restore funding to previous levels.¹⁴ Türkiye also saw an enormous increase in research and development investment in the last few years, driven in part by expanded funding university-based research.¹⁵ Across Africa, there were

signs of momentum: Ghana established a new national research fund,¹⁶ research-intensive Ethiopian universities formed a new organization to argue the case for more science,¹⁷ and a new pan-African alliance of research councils was created to promote continental collaboration.¹⁸ In Oceania, New Zealand moved to unite its various science funding bodies into a single organization, to be known as Research Funding New Zealand, which was broadly viewed as a positive move.¹⁹ Less auspiciously, Polish researchers continued to wait for long-promised government action to reform research assessment,²⁰ and Mexico saw its budget for Science, Technology and Innovation cut to a post-2008 low of just 0.16% of GDP.²¹



Quantity vs. Quality

In many developing countries, there is a balance to be struck between spending to maintain or improve institutional quality and spending to increase access to higher education. This year, this trade-off has been especially stark in four countries: Nigeria, Peru, Mexico, and Pakistan.

Nigeria’s take on this debate was perhaps the most raucous. Early in the year, President Bola Ahmed



Tinubu approved a number of new universities, both public and private. Many urged him to go further, with some in Congress claiming that as many as 200 new universities were needed.¹ While the argument for expanding access to higher education was clear, critics quickly argued against expanding institutional numbers when the country had trouble funding its existing complement of institutions². The back-and-forth continued for months until August, when Tinubu abruptly announced a seven-year moratorium on new public universities³ – with little consultation – and his allies called on state governments to do

Echoes of Nigeria's experience could be heard in three other important countries. The clearest parallel was in Peru, where in September the (pro-quantity) Congress, upset with the (pro-quality) President's attempts at education reform, voted through the creation of 22 new universities across the country.⁶ In Mexico, the debate between access and quality has been ongoing for many years. Former President Andres Manuel Lopez Obrador sought to expand access by opening a new set of regional universities called Universidades para el Bienestar "Benito Juárez", which were both expensive and failed to attract many students.⁷ His successor, Claudia Sheinbaum, has signalled plans to double-down on the Juárez universities, to the consternation of some in older universities.⁸ As in Pakistan and Nigeria, critics argue that spending money on new universities when existing universities are severely underfunded is misguided and a poor investment.⁹ Sheinbaum is also attempting to expand access through expansion of online education,¹⁰ and in particular through a new free online education platform known as *Saberes X*.¹¹

Finally, there is the strange story of a proposed new university in Pakistan. In 2019, a Pakistani tycoon forfeited £190 million to the British National Crime Agency, which subsequently returned the money to the Pakistani government.¹² Earlier this year, the government proposed using this money to establish a new university in Islamabad,¹³ despite existing universities being deeply in debt.¹⁴ While such a move might have been

justified if unmet demand existed, but as we note elsewhere (see ENROLMENTS & DEMOGRAPHICS), enrolments in Pakistan are actually declining sharply at the moment, making this proposal a case of neither expanding quantity nor supporting quality.



Private Universities

One very prominent trend this year has been the number of governments rethinking how the private university sector can contribute to national goals. However, countries remain divided on whether private institutions are a boon or a bane.

In Europe, where private university enrolment – especially at the master's level – is very much on the rise (see WORLD HIGHER EDUCATION IN DATA), the policy emphasis has mainly been on reigning in growth amid concerns about "low quality". This has especially been the case in Spain, where a new law was introduced to restrict use of the term "university" to institutions with multiple faculties and a sufficiently large student body.¹ In France, the government floated policy proposals to make it harder for "low quality" private institutions to secure prominent positions on Parcoursup,² the fiendishly complicated and



the same.⁴ In the end, the seven-year moratorium barely lasted seven weeks. By mid-October, the House of Representatives had passed a bill approving seven new universities, and in the first week of November, Tinubu himself approved the creation of a Federal University of Science and Technology in Lagos State.⁵



unloved French university application portal (these plans stalled when the Bayrou government lost a no-confidence vote in September). Greece, by contrast, took a different path: after long refusing to accept private education, it authorized four new “private” institutions to open,³ although three of the four are actually partnerships between domestic and foreign public institutions.

In Africa, both Tunisia⁴ and Morocco⁵ took steps to revise their regulation of private universities; in the former to ensure that they had sufficient full-time academic staff, and in the latter to encourage private universities to take on a greater share of the burden of expanding access (a strategy which is quite common in developing countries where demand for education outstrips the public’s ability to pay for it). South Africa is seeing a boom in private higher education at a time when public education is struggling to meet demand;⁶ this year a new private institution opened in Durbanville,⁷ and private institutions were allowed to use the term “university” for the first time.⁸ Perhaps most surprisingly, the Indian state of Kerala – long ruled by the Communist Party – also passed legislation making it more attractive for private universities to exist.⁹

Of course, private higher education is not on the rise everywhere. Private institutions are under extreme pressure in Indonesia, where after years of steady decline the sector posted another 28% fall in new enrolments.¹⁰ In Russia, new rules allowing public universities more lati-

tude to charge tuition fees are likely to have a profoundly negative impact on the prospects of private universities.¹¹



Branch campuses were a major phenomenon in the early years of the century, but enthusiasm for this particular form of transnational education waned as the aughts turned into the teens. Now, they are back with a vengeance. Global data from the Cross-Border Education Research team shows that the number of branch campuses worldwide has grown by 15% in the past two years.¹

The biggest developments around branch campuses were in India, which had long resisted the idea of branch campuses, mainly on protectionist grounds. The National Education Plan (NEP) had opened the door several years earlier, but it was only in 2025 that actual agreements for the opening of international campuses began to be signed. Leading the way were nine campuses of UK institutions², six Australian ones,³ and a seventh campus made up of a consortium of six more individual universities.⁴ One American university was also greenlit for an Indian campus – the auspiciously – named Illinois Institute of Technol-

ogy⁵ (IIT – get it?). More are expected to follow. Elsewhere in South Asia, Pakistan approved new branch campuses for universities from the United Kingdom, South Korea, and Kazakhstan⁶ (and also, confusingly, announced a new campus of Imperial College of London which the institution quickly denied).⁷ Bangladesh, which is not yet accepting foreign campuses, has at least begun exploratory discussions with potential international partners.⁸

Central Asia continued to be a hotbed of branch campus openings⁹. Uzbekistan continued to grow its stable of foreign campuses with launch of a new France-Uzbek University,¹⁰ bringing it to third in the world for hosting foreign institutions.¹¹ Kazakhstan not only welcomed new universities from France,¹² Italy,¹³ and Wales¹⁴ (the last being very controversial in the home country due to cuts going on there at the time) and half a dozen other countries,¹⁵ but opened new campuses of its own abroad (in Pakistan,¹⁶ Kyrgyzstan,¹⁷ and most surprisingly, Russia¹⁸). Other middle-income economies which joined the trend of opening campuses abroad included Egypt,¹⁹ which is developing campuses in Tanzania, Sudan, and the Comoros, and Morocco,²⁰ where the École marocaine des sciences de l’ingénieur (EMSI) set up a new campus in Mauritania²¹.

As noted elsewhere (see THREE POLICY MOVERS), Greece allowed four foreign universities through joint ventures with domestic institu-



tions.²² Saudi Arabia approved a number of new foreign campuses including from Australia's University of Wollongong,²³ America's University of New Haven,²⁴ and Egypt's Alexandria University.²⁵ In Dubai, three new foreign universities opened this year – notably none from Western countries – hailing rather from Lebanon, Saudi Arabia, and India.²⁶ The Philippines²⁷ and Thailand²⁸ also announced processes to welcome new foreign institutions to establish branch campuses.

Will all these measures be successful? It will depend on very local demand factors. As one astute observer of South Korea's Incheon Global Campus noted, the idea that branch campuses can have a *regional* audience, beyond the host country itself, is suspect.²⁹ It works in Dubai, but it is not clear that it works anywhere else.



International Student Flows

As with enrolments overall, flows of international students were a mixed bag: in the Anglosphere, the major stories were about the reduction of student numbers. Australia, Canada, and the United Kingdom all saw or anticipated sharp drops in the number of international students based on various forms of visa caps

introduced in 2023 or 2024 to deal with perceived housing shortages (Australia and Canada) or just general nativism (the United Kingdom). In the United Kingdom, sponsored study visas remained about 20% below where they were in 2023.¹ In Australia, new international student numbers were down 16% in 2024, and close to 40% from 2023.² In Canada, the number of new international student permits in the first six months of 2025 were 70% lower than the previous year.³ In the Netherlands, where the government has been trying to reduce inbound student mobility for some time (partly because of housing concerns, partly because of concerns about the overabundance of English instruction), new international student enrolments fell for the third consecutive year.⁴ The United States, in addition to revoking the visas of 6,000 international students for various reasons including “support for terrorism” (which seemed to be code for “supporting Palestinian causes”),⁵ reported in July that international student visas were down by 27% year-over-year. However, data on the number of students entering the country in August (usually the busiest month for student arrivals) was steady compared to 2024.⁶

Outside the Anglosphere, however, inbound international student flows generally continued to rise. Germany⁷ and France⁸ both posted record numbers of international students in 2024-25, as did Türkiye,⁹ South Korea,¹⁰ and Japan.¹¹ The latter three of these are all having problems with domestic enrolments, which

suggests that – to some extent, at least – countries are trying to emulate Canada's mid-2010s trick of using international students to fill a demographic trough. Dubai's international numbers grew by nearly 30%.¹² Hong Kong's experiment with expanding “non-local” student numbers (this a complicated way of saying “international” without suggesting that the People's Republic is a foreign country) from 20% to 30% without cutting local spots in absolute terms, was deemed such a success that towards the end of the year, the government decided to raise the ceiling to 50% for 2026.¹³ Still, not everyone was convinced this expansion could be done without impacting locals' access to local universities.¹⁴

A similar, but more contentious case of international students vs. local students arose in Malaysia (see MALAYSIA). As the number of international students increased, particularly at prestigious public universities,¹⁵ the Malaysian Chinese Association (MCA) began protesting that international students were being accommodated at the expense of Chinese Malay students.¹⁶ This led to some acrimonious exchanges between the MCA and the government over the truth of this accusation.¹⁸

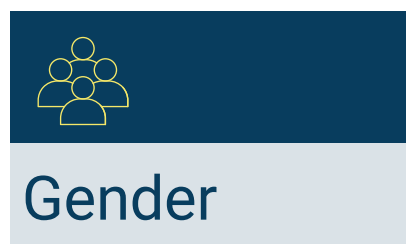
At a broad level, a clear pattern is emerging: international student numbers are increasing in Asia and parts of continental Europe, while declining in predominantly rich, white, Anglophone countries. This does not imply a simple transfer of





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students from Anglophone countries to Asian destinations, as the source countries differ significantly. Rather, it signals a structural shift in global mobility: we are likely entering an era where south-south international student mobility will take predominance over south-north mobility.



Perhaps because people's attention was diverted elsewhere by financial crises and incipient fascism, there were relatively few major global stories about gender in higher education this year. Those that did emerge were often focused on restrictions, such as dress codes targeting women, for instance at Chulalongkorn University in Thailand¹ and Olabisi Onabanjo University in Nigeria². In Afghanistan, where

women have been banned from attending university since the Taliban returned to power, a new wave of book banning in universities appeared to target women authors specifically.³

A couple of major studies on gender and higher education made the news. One was a study released in Finland entitled *The Global Gender Gap in Science: Pipeline or Choice*,⁴ which looked at centralized admissions data from ten countries to try to work out the reasons for the persistent gender gap in STEM fields around the world. The paper concluded that while levels of female academic preparedness varied widely from one country, among those qualified to apply for STEM fields, women were consistently about 25% less likely to apply than men, which the authors say "points to structural forces beyond local conditions". Meanwhile, in Ireland, a paper by a prominent sociologist suggested that the famed Athena Swan Charter, a two-decade old framework for transform gender relations in higher education, is actually just a form of "genderwashing".⁵

Elsewhere in Asia, perhaps the most notable story with respect to gender came from Dalian Polytechnic University China. There, a female student began a relationship with a foreigner – a top e-sports player from Ukraine – who then posted nude pictures of her online. The incident sparked widespread controversy and the university's response was to expel the female student because the photos – and her relationship – "undermined national dignity".^{6 7}

In somewhat happier news, Japan reported a record percentage of female faculty (28%) and students (46%),⁸ and Iceland became the first country to have an all-women cohort of university presidents.⁹



Language politics surfaced in many countries' higher education systems this year. This has been a long-standing issue in many European countries whose local language pool is fairly small. For instance, in Norway, ongoing controversy surrounded the effects of a 2024 law which forced Norwegian PhD and post-doctoral students to study in Norwegian¹. At the start of the year, the Dutch government's pressure on universities to reduce English-language instruction at the undergraduate level led to a drop in international enrolment,² which in turn exacerbated the effects of other funding cuts. However, the government did eventually choose not to introduce a Dutch-language proficiency test that many critics argued would have led to a "massacre of programs".³ Meanwhile, in Estonia, the University of Tartu reduced English-language programming in favor of Estonian, a move driven more by demography and demand rather than language politics.⁴



Outside Europe, the use of English continued to spread, though not without opposition. In Vietnam, the National Economics University announced plans to deliver 30% of all courses in English by 2028,⁵ as part of a broader national strategy that some experts say is outpacing the system's English as a Second Language (ESL) capacity.⁶ In the Philippines, the University of Cebu's shift to English-only instruction came under fire for restricting students' ability to learn in Tagalog.⁷ Most strikingly, Algeria declared that its universities would shift *en masse* from French-language instruction to English-language instruction, effective fall 2025.⁸

But language politics are not just about English. In many countries, such as Uzbekistan⁹ and Saudi Arabia,¹⁰ the use of Chinese languages is growing, albeit more as a language option for students in various subjects rather than as a language of instruction. When Nanyang Technological Institute introduced a master's program in business with instruction in Mandarin, many locals dismissed the effort as being simply a money-grab for international students.¹¹ And, in

Somalia, the introduction of teaching in Swahili in the country's universities was a naked piece of geopolitical politics as the country seeks tighter relations with the mainly Swahili-speaking countries of the East African Federation.¹²



Obviously, the biggest story in student politics in 2025 has been the ongoing confrontation between students and the government in Serbia. The movement started in November of 2024 when a shoddily constructed railway canopy collapsed,¹ killing 16 people. Students from the local faculty of philosophy initiated demonstrations, denouncing government corruption that allowed the structure to be built so poorly. The government's contemptuous and dismissive attitude towards protests – and their sometimes violent responses – transformed the protests into a wider social movement,² calling for the resignation of the Prime Minister and the President, and for new elections.³ Protests continued throughout the year despite police repression,⁴ and whilst the Prime Minister was ousted in January,⁵ President Vučić neither resigned nor called elections. Student-led protests on a single issue rarely last

this long; keeping the movement going, even in the face of internal stress,⁶ was a major feat of organization.⁷

In a muddled attempt to ease tensions, the Serbian government tried to placate the higher education community by increasing salaries and student assistance,⁸ while at the same time introducing a law which severely restricted the time made available to professors to pursue research⁹ and withholding certain statutory payments to universities.¹⁰ All this did was antagonize and intensify the situation further. Towards the end of the year, the protesters put together a "student list" to stand for election in the event one should be called;¹¹ one survey suggested it might even defeat Vučić in a head-to-head fight.¹²

There were echoes of the Serbian experience in Georgia where a pro-European movement challenged a pro-Putin government for most of the year. The difference was that students, while an important part of the protest coalition,¹³ did not have quite the same leadership as students in Serbia. That has not prevented the government from announcing a State Commission to Reform Universities,¹⁴ a move widely interpreted as an attempt to gain more control over institutions that might represent centres of opposition.¹⁵ Students in Türkiye also took to the streets early in March, mainly to protest the jailing of popular Istanbul mayor – and likely opposition candidate for President) – Ekrem İmamoğlu on a variety of trumped-up charges,¹⁶ though



political interference on university campuses was also a factor.¹⁷

Bangladesh had a quieter year in 2025 than in 2024, when students led a movement that overthrew the government of former Prime Minister Sheikh Hasina,¹⁸ but it was still a notable year nonetheless. Students formed their own political party¹⁹ for national elections to be held in 2026, but internal divisions quickly emerged due to perceived dominance by elite public universities in the capital, Dhaka.²⁰ In September, the country's universities began holding free student elections for only the sixth time in the last century;²¹ at some of the country's most elite universities, it was an Islamist party that swept the polls.²²

Smaller but still notable instances of higher education-related resistance include protest against tuition fees in South Africa²³ and Congo-Brazzaville.²⁴ Students in Cuba took to the streets in one of that country's larger instances of public protest in recent years, not for education-related reasons, but rather to protest an increase in mobile internet connection charges.²⁵

Late in the year, a number of countries became convulsed with so-called "Gen Z protests".²⁶ The common thread from Nepal,²⁷ Indonesia,²⁸ Morocco,²⁹ and Peru³⁰ was that large numbers of youth were in the street protesting corruption and stagnant or declining living standards. While students were involved in all of these protests – and in the cases of Morocco and Peru causes related higher educa-

tion funding were to some degree incorporated in the protests – they were not "student protests" in the sense that they were not actually led by student organizations or students. This possibly demonstrates that as massification continues, the leading role students have traditionally had in developing-world politics may be dissipating.



People in the humanities often claim that their fields are under attack. But in 2025, in several countries, they actually were.

Obviously, in the United States, a good deal of the "war on woke" has really been a war on the humanities, and, in particular, on how and what history is taught.^{1 2} These attacks are not directly financial in nature (President Trump did eviscerate the National Endowment for the Humanities,³ but this program was never primarily aimed at universities). Instead, the real focus has been on politicizing disciplines and attacking or defaming professors whose interpretations and/or ideologies diverge from ultra-conservative narratives. That said, as many have pointed out,^{4 5 6} the general pressure on the humanities long predates Trump.

Over in Belarus, the humanities are so feared that the European University of the Humanities – an institution which was forced into becoming a university-in-exile in Lithuania in 2025 – was designated as an "extremist organization". In China, the government announced a series of measures aimed at shifting university programming away from humanities and towards programs in science and technology,⁷ though it remains unclear how universities will be expected to fund the significantly higher costs of STEM programs, especially since government funding has been stagnant or declining since 2019. Meanwhile, graduates from arts and humanities programs are struggling – and sometimes succeeding – in their attempt to make their way through the country's increasingly tough job market.⁸

One piece of unexpected good news for the sector came from South Korea, where new enrolments in the new humanities rose sharply this year.⁹



While much attention has been focused on weakening graduate outcomes in North America, it seems as though the more troubling trends are occurring in Asia.



The Chinese government famously halted and then altered its statistics on youth unemployment once these passed 20% in 2023.¹ A revised rate is now somewhere between 15%² and 19%,³ though many suspect it is in truth much higher; and for those who do get jobs, salaries are not especially generous.⁴ Observers have noted that this crisis is reshaping youth culture in China.⁵ One particularly strange story that emerged this year was one about how some graduates were paying to sit in fake offices in order to pretend to their families (and themselves) that they have a career.⁶ And this is not simply a matter of graduates who have “mismatched” with the labour market: even STEM graduates appear to be struggling.⁷

These stories have echoed all across Asia. In Singapore, there was widespread anxiety over a sharp decline in the number of graduates getting jobs.⁸ In India, only 40% of engineering students had secured jobs prior to graduation.⁹ In South Korea, the unemployment rate among university graduates surpassed that of middle school graduates,¹⁰ and unemployment among PhD graduates reached an all-time high.¹¹ Türkiye’s graduate employment rate also fell slightly.¹² In Uganda, one of many African countries where graduate unemployment or underemployment is rife, President Yoweri Museveni announced the creation of a special fund to support graduates who have been without a job for more than two years.¹³ In North America, the job market absolutely imploded for recent computer science gradu-

ates;¹⁴ university graduates are making up an increasing share of the long-term unemployed in the United States,¹⁵ and the overall state of the market for graduates in Canada appears bleak.¹⁶

Does this mean, as *The Economist* suggested, that graduates everywhere are “screwed”?¹⁷ Is AI truly eliminating entry-level jobs? The answer is mixed: AI is pretty clearly having an effect on entry-level hiring in the software industry but not so much in other fields.¹⁸ The news on graduate unemployment is generally fairly positive in Taiwan¹⁹ and Europe²⁰ (though in places like Italy²¹ and Albania,²² employment may be high but salaries low). Nevertheless, the warning signs are clear: in many countries higher education expansion may be bumping up against the absorptive capacity of national economies.



Higher Ed in Wartime

The dominant higher education story in 2025 with respect to universities and war continues to be the conflict in Ukraine. Russian forces continued to bomb Ukrainian higher education institutions,^{1,2} despite their having no military value. Ukrainian students in medical disciplines were required to undergo combat training³ and



various⁴ deferments for graduate studies were revoked because of persistent military recruitment shortages.⁵ Statistics showed more students heading abroad to study⁶ (albeit not in overwhelming numbers), while within the country the “hot” city for studying switched from frequently-bombed Kyiv to the more conflict-free western city of Lviv.⁷ On the Russian side, universities helped the war effort by opening new master’s programs in evading economic sanctions,⁸ developing programs to measure students’ belief in and adherence to “traditional values”,⁹ and providing scholarships to war veterans.¹⁰ And in Croatia, worries about European security led the government to reintroduce conscription,¹¹ which will likely alter patterns of university attendance over the next few years.

In Thailand, border skirmishes with Cambodia led to the countries’ universities also offering free tuition for veterans,¹² as well as rescinding any degrees they might have issued to Cambodian strongman Hun Sen.¹³ Further, a brief Indo-Pakistani war in the spring led to some odd diplomatic gymnastics: when Türkiye announced its support for Pakistan, a host of Indian universities can-



celled whatever co-operation agreements they had with Turkish universities.¹⁴

There were two very interesting stories relating to universities and civil conflict. In Myanmar's civil war, guerilla-held territory is apparently host to 18 universities, colleges and academies,¹⁵ which suggests that education is in no way reliant either on state funding or state approval. Meanwhile, in the Congo, the Rwanda-backed M23 rebel group seized the city of Goma just before the national matriculation exams were due to be held.¹⁶ The rebels tried to force the university to cut off ties with Kinshasa,¹⁷ but in the end the rebels allowed state examinations to take place and exam papers to cross the front line into government-held territory.¹⁸



Artificial Intelligence

2023 and 2024 saw an explosion of new university-level programming in Artificial Intelligence. The big news in 2025 was the arrival – or at least the announcement – of a torrent of artificial intelligence universities. Universities focused solely on this new(ish) technology were announced in Nigeria,¹ the United Arab Emirates,² India,³ and Kazakhstan.⁴ Iraq decided on a more decentralized

approach by announcing its intention to establish ten AI-focused colleges at existing universities,⁵ two of which have already opened.⁶

There are a lot of hopes for this technology, and quite clearly a lot of developing countries believe it is the kind of short product-development cycle technology that might allow them to “leapfrog” others economically. Is this true? And if so, will this specific kind of investment be the key to unlocking it? The jury is nowhere close to being in, but it is worth noting that in China – one of the leading countries in pushing institutions to develop degrees in AI – graduates of such programs are having difficulties finding jobs.⁷

With respect to the use of AI within universities, a great deal of the controversy and sometimes moral panic came around how AI challenges notions of academic integrity. This was most dramatically demonstrated in a massive online exam cheating scandal at Yonsei University.⁸ A smaller number of institutions – most notably Arizona State University⁹ and Ohio State University¹⁰ – are focusing on embedding AI literacy across the curriculum.

There are broadly two factors working against the broader embedding of AI into the curriculum. The first is that companies have yet to define what AI skills matter in the labour market, in part because AI itself is a long way from living up to its corporate hype. Boston Consulting Group reported in the late summer that 95% of companies using AI had yet to see any value from it.¹¹ A pilot program in the UK



government found that gains in public sector productivity from the use of AI are essentially zero.¹² Without hard evidence of what works, altering curricula can easily seem premature. The second factor is that developing education-related AI modules or agentic AI that professors will trust is neither cheap nor simple.¹³ Neither problem seems likely to be solved in the near future.

Of course, there remains enormous resistance and opposition to AI within universities. Sometimes this is due to the generally awful behaviour of the AI companies themselves and the rather clear manner in which they are trying to sell large packages of services in order to give themselves better cash flow to survive the potential popping of an emerging bubble.¹⁴ But, there are also serious worries about the way that generative AI is genuinely destructive of the skills that universities – or social science and humanities programs at least – are trying to inculcate.¹⁵ A number of Belgian and Dutch AI researchers signed a letter advocating restricting or even banning the use of AI in higher education.¹⁶ Some students, too, are realizing that, to some extent at least, using AI makes their university experience less valuable.¹⁷





Academic Corruption

Academic corruption remains a global scourge. As in previous years, many stories involve mass cheating on exams or systemic corruption in the awarding of degrees to unqualified students. In Tanzania, over 120 students were mass-expelled from the University of Dodoma for cheating.¹ In Argentina, national medical exam was the subject of suspected mass fraud.² Morocco was rocked by a serious “diplomas for sale” scandal at a university in Marrakech;³ and the University of Lebanon saw a similar scheme to sell master’s degrees and doctorates.⁴ In China, Peking Union Medical College was at the centre of a high-profile scandal involving a nursing student who was improperly

admitted to a prestigious program and committed academic fraud in scientific publications with the assistance of several instructors.⁵

Research fraud continued to be a major issue. High-profile cases involved Harvard researcher Francesca Gino, who was fired for fabricating data,⁶ and Spanish chemist Rafael Luque, whose unethical publication practices, exposed in 2023, continued to have his papers retracted at a world-record pace.⁷ However, Luque still trails German anaesthesiologist Joachim Bolt, who has had 220 of his 400 lifetime papers retracted.⁸ But the larger and more troubling trend is not about individual bad actors, but the organization of fake research into big business⁹ by what are essentially criminal enterprises.¹⁰ Research fraud has also been linked to the use of artificial intelligence.¹¹ Even mathematics, once assumed to be relatively immune from fraud, now appears to have succumbed to the trend.¹² While academic fraud is a global phenomenon, India appears to be suffering disproportionately from this affliction both in terms of retracted papers¹³ and patent fraud.¹⁴

This kind of fraud is not limited to professors; student essay fraud is a now a major global issue as well. In September, a British documentary team released, *The Shadow Scholars*, a film exposing the rise of community essay mills operating out of Nairobi in recent years:¹⁵ as an example of academic exploitation and neo-colonial dynamics, this story is particularly striking. Fraud can also occur before students reach campus: the

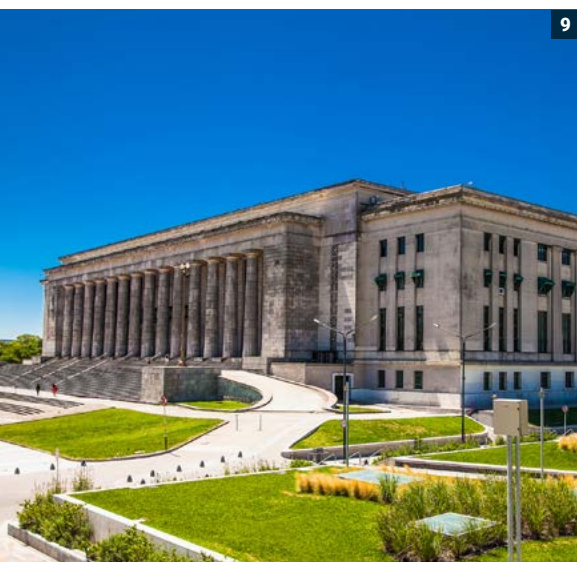
Chinese University of Hong Kong reported a wave of applications from non-residents containing fake prior academic credentials.¹⁶

And finally, academic corruption also extends beyond students and faculty. In Nigeria, a major scandal erupted following accusations with respect to fraud and bribery in connection with the country’s academic accreditor,¹⁷ raising serious questions about governance and oversight in the country’s higher education sector.



Criminal Activity

Universities handle a lot of money, and that makes them potential targets for fraud and embezzlement. One of the biggest stories this year emerged in the Czech Republic, where more than a dozen officials at Motol University Hospital were arrested on suspicion of bribery, embezzlement, money laundering, and misuse of EU funds.¹ Similar scandals unfolded elsewhere: the University of Porto was caught up in a multi-million-dollar IT fraud scheme,² the Universidad de Buenos Aires saw a number of staff arrested for fraud and embezzlement worth over \$1 million (USD),³ while Polytechnic University of Timisoara in Romania also saw an embezzlement scandal of €2.5M of Erasmus funds.⁴



9



Accusations that institutions were complicit in facilitating migration fraud emerged across multiple countries this year. In Bulgaria, the European Polytechnic University in Pernik, a private institution owned by an Italian company, was accused by the Education Ministry of operating as a front for illegal immigration to the EU.⁵ In Kyrgyzstan, authorities expelled 20,000 students for “not conforming to” regulations, amid allegations that many of the students were foreigners masquerading as students in order to get into the country.⁶ Similarly, in Thailand, the government initiated a crackdown on international students attending a specific group of Chinese-owned universities, which were suspected of serving as conduits for illegal immigration rather than legitimate education providers.⁷

In Cambodia, stories emerged of universities acting as a front for organized crime, in particular for online scam operations.⁸ These scam operators appeared to operate a strong pipeline, luring South Korean students into captivity and working for them;⁹ in October, one such student was found dead, apparently from torture at the hands of the scammers.¹⁰

Elsewhere, in Singapore, universities warned that fraudsters posing as student agents were collecting thousands of dollars per student in return for “guaranteed acceptance” at the National University of Singapore and Nanyang Polytechnic University.¹¹ And, in possibly the strangest example of university-re-

lated fraud in the past year, Uganda’s Victoria University had to publish a warning that someone was impersonating its vice-chancellor and signing deals with local businesses.¹²



Student Housing

One of the most frequently reported stories around the globe this year involved the high cost of housing. While circumstances varied widely across countries, concerns about rising student housing costs and their wider social impacts were prominent in Australia,¹ Canada,² Spain,³ Greece,⁴ Italy,⁵ Hong Kong,⁶ Kazakhstan,⁷ Türkiye,⁸ Nigeria,⁹ and the United States.¹⁰ From a higher education policy perspective, the housing crisis poses some serious challenges. One possible response is to de-emphasize elite or “top” universities located in overcrowded capital cities. But, if housing is unaffordable absolutely everywhere, is it really a crisis, or simply a broader feature of modern urban life? And to what extent should education policy be shaped by the demands of NIMBY-ism and the failure of many economies to build adequate amounts of shelter? These are questions many countries will be facing over the coming years.

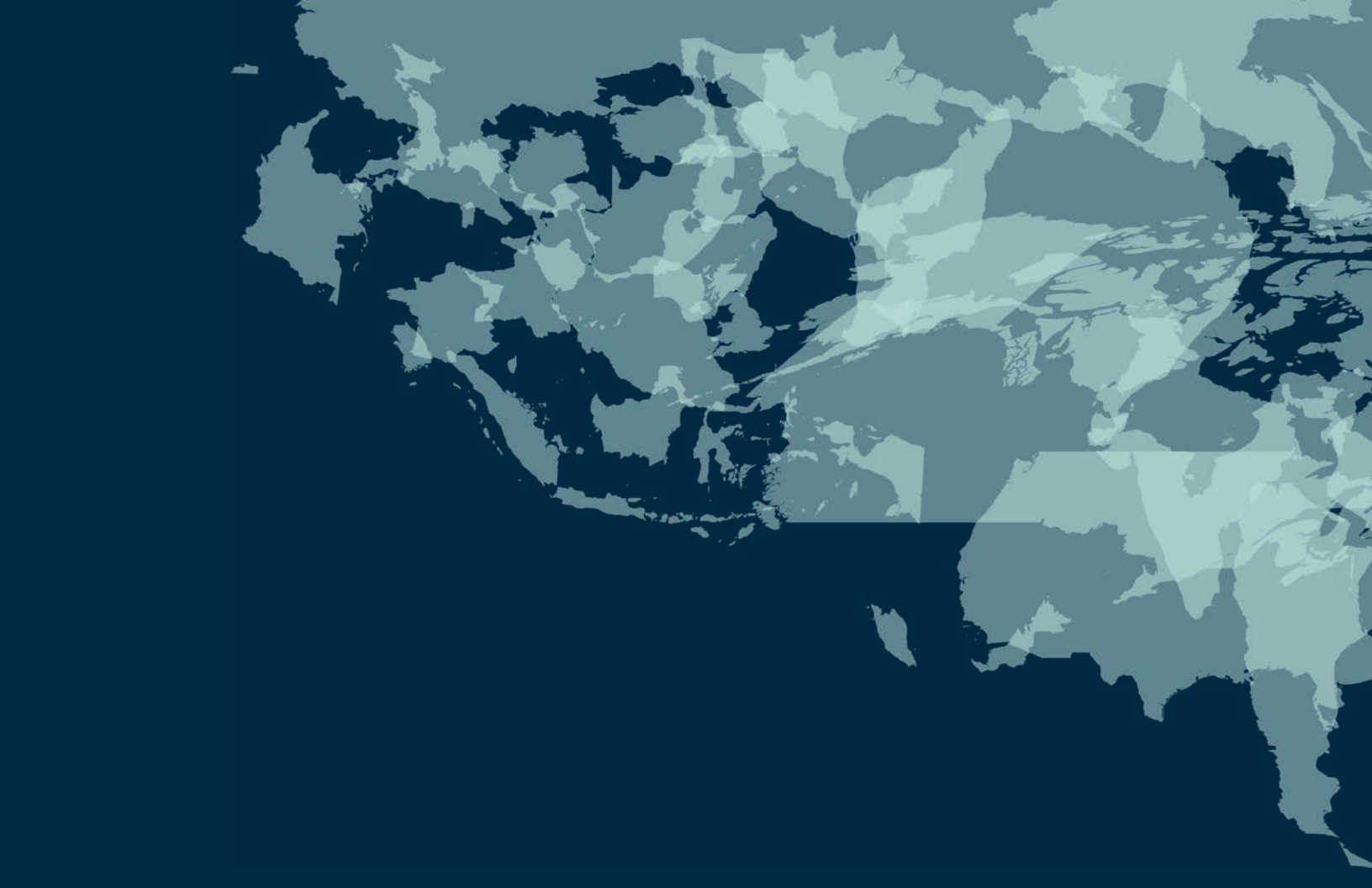


Violence and Tragedy

This year saw several tragic incidents involving large numbers of students. In April, a bus plunged into a ravine in Colombia, killing ten students from Humboldt University Colombia.¹ Only weeks later, another bus accident, this time in Perak State Malaysia, claimed the lives of fifteen students from Universiti Pendidikan Sultan Idris.² Also in June, a group of six Chinese engineering students died by drowning on a field trip to an ore dressing plant in Inner Mongolia.³

In addition to these acts of God, two South Asian countries have seen substantial numbers of student deaths due to suicide and ragging (hazing). In India, a report documented 51 ragging-related deaths between 2022 and 2024,⁴ with cases reportedly concentrated in medical universities.⁵ Sri Lanka has faced similar significant challenges with ragging in the past year.⁶





National Summaries



The United States' enrolment picture is a complex one. As figure 1 shows, total enrolments reached an all-time peak in 2010, buoyed in particular by a wave of enrolments in for-profit universities. That particular bubble burst over scandals involving recruitment, but enrolments in public and non-profit higher education also started shrinking at around the same time. Thus began a long, slow decline in total enrolments which was particularly concentrated in public 2-year colleges, where enrolment was squeezed by a tight labor market which obviated the need for vocationally oriented enrolments. Enrolment in public 4-year colleges meanwhile has increased steadily. Only in 2023 did total enrolments begin to experience a recovery.

Financially, the picture for American higher education – which was fairly bleak in the wake of the 2008 financial crisis – improved every year from 2013 on. Even during the first Trump administration, higher education saw regularly increasing public expenditure from both the state and federal levels. The large spike in spending in 2021 was due to the \$75 billion Higher Education Emergency Relief Fund (much of which was distributed to students in the form of emergency student aid) given out as a response to COVID-19. By 2024, a combination of reduced enrolments and higher funding meant that public per student expenditure was up about 15% on 2010.

And then came 2025 and the War on Higher Education.

It began on January 20 with attacks on the key science agencies. There were two prongs to the Trump administration's attacks. The first was to arbitrarily revoke already-allocated 2025 funding on projects deemed "woke"¹ – effectively anything involving an astonishingly long list of keywords like "bias", "inequalities", "LGBTQ", etc.² The second was to drastically reduce the amount of research overhead paid to institutions by the National Institutes of Health³ and the National Science Foundation.⁴ The NIH cuts alone were worth about \$4 billion and hit some institutions disproportionately hard: Johns Hopkins University alone was foreseen to take a \$200M cut.⁵

Most of these maneuvers were challenged in court and in the end overturned^{6 7}, but in the meantime a great deal of work was abandoned, which was presumably the entire point of the exercise. The Trump administration then tried to make cuts permanent from 2026 through the more normal budgetary route, asking for cuts of 56% to the National Science Foundation and 40% to the National Institutes of Health.⁸ Prolonged political wrangling – including a 43-day government shutdown⁹ – meant that by December 2025 there was still no agreement on a budget for 2026, but it appeared that congressional Republicans had effectively ignored the President's call for cuts in the health field.¹⁰

Whether Trump would spend funds that Congress might authorize is an open question, though. Certainly, an executive order issued in August giving political appointees the ability to micromanage research decisions in the name of combatting wokery¹¹ suggested that there would be plenty of opportunities for more conflict with institutions.

After the general attacks on science came the attacks on specific institutions. Using charges of antisemitism and a misleading interpretation of the 2023 SCOTUS ruling on race and college admissions to allege bias and malfeasance, the Trump Administration would pick an institution and announce that all federal grants would be frozen until that institution signed an agreement with the Administration. The content of these agreements varied from one institution to another, but they usually involved paying a multi-million dollar fine and then submitting to some kind of continuing administration oversight. Higher education was not the first sector to be so attacked; the legal and entertainment industries were given this treatment slightly earlier¹². But the point was the same everywhere: Trump wanted obeisance, and where possible, to eviscerate academic freedom.¹³ Columbia caved quickly,¹⁴ as did the University of Pennsylvania.¹⁵ Brown University,¹⁶ the University of Virginia,¹⁷ Cornell University,¹⁸ and Northwestern University¹⁹ followed soon after. UCLA²⁰, George Mason University²¹ and Duke University²² have similarly had funds suspended, but at time of writing had not signed settlements.





The biggest hold-out in this game was Harvard, which throughout 2025 has been fairly steadfast in refusing to reach a deal with the Administration,²³ and declared in April that it was “not prepared to agree to demands that go beyond the lawful of this or any administration”.²⁴ In May, Homeland Security decided to terminate Harvard’s ability to teach international students due to “pro-terrorist conduct”,²⁵ a move that was overturned in courts within 24 hours.^{26 27} Trump then stripped Harvard of all its remaining funding, though this too was overturned by the courts.²⁸

Eventually, the Administration tired of its institution-by-institution bullying approach and instead shifted to a “One Big Deal” strategy, which it termed the “Compact for Academic Excellence in Higher Education”.²⁹ Under this deal – which Trump offered to nine major research institutions on October 1 – universities would agree to hand control of admissions to the Trump administration, transform/abolish institutional units the disparage or belittle Conservative ideas, abolish any use of race or gender criteria in hiring, adopt a standard of “institutional neutrality” which would prevent all employees from speaking in public about “societal and political events”, fight against grade inflation, freeze tuition for five years, provide free tuition in the sciences if their endowment is over \$2 million/student, and limit foreign enrolment to 15% of the student body. All of this in return for...well this part wasn’t clear, but the text of the Compact certainly suggested that universities’ existence as tax-exempt entities, their ability to receive research funding, recruit foreign students, and eligibility for student aid programs would all be harmed if they *didn’t* sign the deal. It was such an obvious travesty³⁰ that seven institutions rejected it outright, while Vanderbilt University and the University of Texas simply chose not to say yes or no.³¹

The Harvard spat was not the first or last time that international students were in the administration’s crosshairs. In March, the administration began arresting and detaining international students who expressed pro-Palestinian views.³² In April, the government began revoking hundreds or even thousands of student visas for reasons that were not always easy to discern.³³ In May, the State Department briefly stopped all new visa

interviews and gave notice that it would be vetting student visa applicants using their social media profiles.³⁴

There were of course a number of other stories which, in a normal year, would have dominated headlines. The federal government’s decision to abolish the Department of Education³⁵ and scatter its functions across a half-dozen other government agencies,³⁶ for one. The State of Texas’ brutal assaults on academic freedom for another.^{37 38} Not to mention the very extensive cuts that institutions have been required to undertake either because of federal cuts,³⁹ or, as in the case of the University of Chicago, due to an institution’s own long-term mismanagement.⁴⁰

But it was not a normal year.

Figure 1: Total Enrolment by Sector, in Thousands, United States, 2006-2024

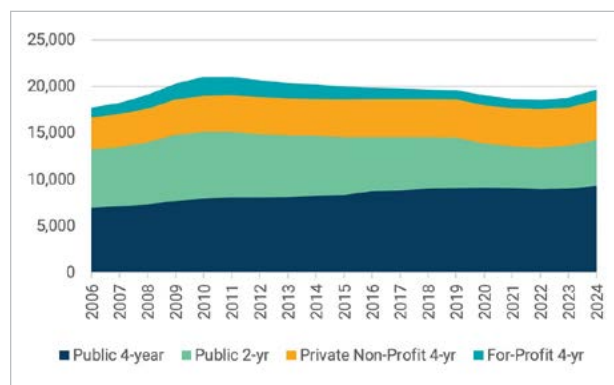
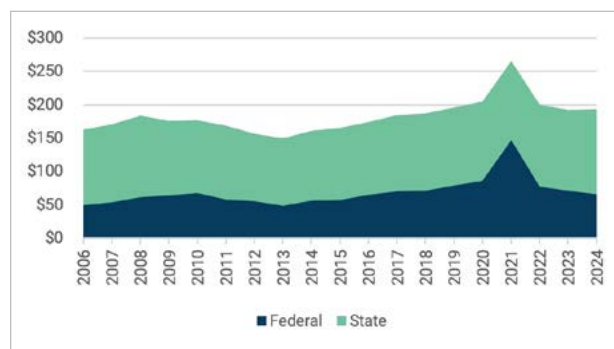


Figure 2: Public Spending on Higher Education Institutions, in Billions of \$2024, United States, 2006-2024





After growing its tertiary system at a frantic pace for three decades now, it seemed unremarkable when the rate of enrolment growth in China plateaued in the mid-2010s. But, in a stunning turnaround in the six-year period of 2018-2024, the system grew in size by nearly 30%. Growth has been fastest in the vocational education category, but all sectors have seen at least some growth. That said, the market for private higher education in China began to slacken in 2025¹, which may be an early signal of softening demand.

However, as figure 4 shows, this spectacular enrolment growth has not been accompanied by much, if any, growth in public funding. In fact, public expenditure in inflation-adjusted currency in 2024 was slightly below what it was prior to COVID-19. One seeming effect of the slackening of public support and weaker university revenues was a student “flight to quality” – that is, ever-greater demand for degrees from the wealthiest and most prestigious universities. Unfortunately, this is leading to large increases in tuition at those universities, a development that has raised concerns about access and equity.²

Much was written this year about China’s prowess in computer science³ and in engineering,⁴ and whether Chinese universities have surpassed American institutions as the “best in the world”⁵. Internally though, there was little triumphalism. Despite having a reputation for being extremely STEM-focused, the fact is that over the past fifteen years or so, enrolments in non-STEM areas have grown much more quickly than STEM ones, rising from 31% in 1997 to 52% of a much larger student body in 2021.⁶ Some in the system have seen a link between this fact and the persistently high levels of unemployment⁷ and the ever-increasing problem of credential inflation (the most notable case this year being a job advertisement for a canteen director job at Nanjing University which required candidates to hold a doctorate).⁸

The situation has grown sufficiently grave as to spawn a phenomenon of unemployed graduates paying to sit in special offices simply to give the impression to family that they are gainfully employed.⁹ The fear of joblessness

combined with employers’ continued insistence on a 9-9-6 schedule (9AM to 9PM, 6 days a week), youth culture in China is undergoing a major shift, deemphasizing some traditional notions around success and career progression.^{10 11}

The problem of unemployment – and more generally that of slowing economic growth – has led to three types of policy initiatives. The first involves the government developing special short-term initiatives to lower unemployment: specific companies were encouraged to hire students, institutions were ordered to intensify career services efforts, and some financial support was given to companies to hire new graduates.¹² These strategies kept the graduate unemployment rate low in the early spring, but by September it had snapped back to nearly 18%.¹³

The second area of experimentation is at the program level, which has included entire new fields of academic programming, such as those serving the “low-altitude economy”.^{14 15} In all, twenty-nine new undergraduate majors were approved this year for implementation nationwide,¹⁶ and a three-year plan was rolled out to “optimize” university programming for the labour market,¹⁷ which, predictably, means more focus on STEM. It is debatable whether this will work: a report from Peking University suggested that 60% of recent engineering graduates had to find employment in fields unrelated to their studies.¹⁸

Additionally, the government has created a new “fast-track” system of academic program development, which gives universities new powers to accelerate the development of new programs in areas of high labour market demand.¹⁹

The third area of change is experimentation with new forms of universities, particularly research universities. A decade and a half ago, China developed institutions like SUSTech and Westlake, which were meant to be research-intensive, but simultaneously “creative” in orientation (with some debate about what this would mean in practice), giving students more flexibility to determine the content of their own degrees.²⁰ This year,





China created three new “green field” research universities: Eastern Institute of Technology (Ningbo), Great Bay University (Dongguan)²¹ and Fuyao University of Science in Technology. The latter is being funded mainly through a private donation by billionaire Cai Dewang.²² Some of these new universities are already rivalling older prestige universities in attracting top students.²³

Tying all of this together is the new “Education Powerhouse” Plan,^{24 25} designed to make the China the leading education nation by 2035. Most of this plan is focused on making China self-reliant in science and technology; there is a lot of emphasis on the alignment of new study programs with emerging areas of technology, but there is also a fair bit of wording around strengthening interdisciplinary studies, improving the “individual cultivation of talent”, and defining scientific standards for “world-class curricula”. Alongside this, the government is pushing its institutions to start expanding abroad.²⁶

Developments in the United States, particularly the potential exodus of scientists, attracted a great deal of attention in China. In the second half of the year, hardly a week went by without a news story about a foreign-employed academic (usually, but not exclusively, ethnic Chinese) leaving their position to move to China.²⁷

Hong Kong became a centre of attention for higher education when five universities in the city were placed in the top 100 by the Times Higher Education world rankings.²⁸ This coincided with a big push by the government to expand the proportion of “non-local” students (international plus mainland Chinese) in the territory to 50%,²⁹ and unveiled plans to build an entire new academic town in the Northern Territories to accommodate these students.³⁰

In short, while other countries may play around the edges with university reform, China is acting boldly, and its claims to being the leading education country – which might have seemed fanciful 20 years ago – can no longer be dismissed. But funding matters, and recent trends will need to be reversed to ensure this dream becomes a reality.

Figure 3: Total Enrolment by Sector, in Millions, China, 2008-2024

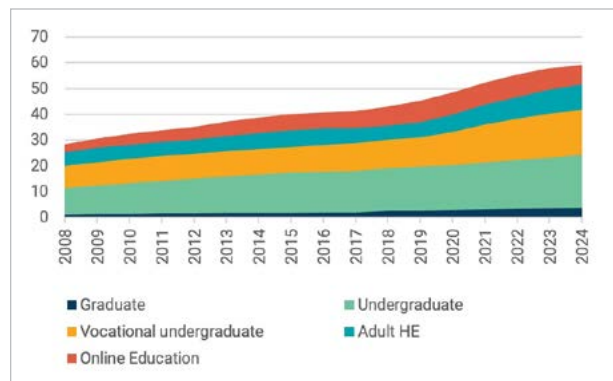
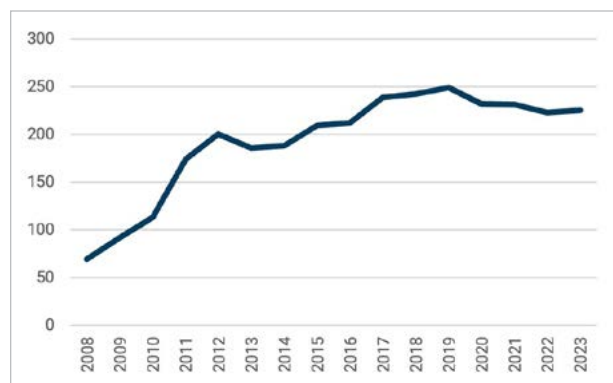


Figure 4: Public Expenditure on Higher Education Institutions, in Billions (¥2024), China, 2008-2024





India's higher education system – huge, riotous, chaotic – might be the hardest national system to summarize, not just because it sometimes heads in quite different directions in different provinces, but because, as a system, it is organized unlike any other. Broadly speaking, it has three main sectors. There are universities, which are sometimes immense, and which offer degrees up to the doctoral level. There are “stand-alone institutions” – specialized, single-subject institutions in professional areas, such as teacher training or nursing. And finally, there are colleges, which exist in the tens of thousands, each one “affiliated” with an actual university. It is in these small (often fewer than a thousand students), inexpensive institutions that three-quarters of the country's 40 million plus students are educated. As figure 5 shows, together these three sectors have been steadily increasing total enrolment by about 1.5 million students a year for the past decade.

As figure 6 shows, however, the expansion of higher education enrolments in the past decade has not been accompanied with any real rise in public expenditure. The prime culprit here is the Union government in Delhi, which essentially stopped putting new money into the system around the time Narendra Modi came to power in 2014 (COVID-19 contributed to the challenge as well). State governments have to some degree taken up the slack, but total public expenditures in the last year for which data is available is just over 7 trillion rupees, the same as it was in 2014-15.

This mix of booming student numbers and constrained public funding creates some paradoxes for the sector. There is no shortage of ambition in the country; the question rather, is whether policymakers genuinely understand what it would take for Indian higher education to succeed globally. On the one hand, you have grandiose

pronouncements, such as the Union Education Minister saying India should strive to place 25 universities in the QS Top 100;¹ but on the other hand, the country mires its universities in funding challenges and ties it in red tape such that some central universities are operating with staff complements barely one-seventh of their authorized levels.² Such pressures to produce output with such tiny inputs go a long way to explaining the high levels of research fraud³ and rankings cheating⁴ seen in the country.

That said, institutional finances were not really the centre of much controversy this year; instead, policy attentions have been much more focused on the shape of the system as a whole. The growth of private institutions has been significant in recent years, particularly in Gujarat.⁵ Even the Communist state of Kerala pushed through legislation approving private universities this year.⁶ Private universities are often seen as compromising the quality of higher education, and a scandal at the country's largest private institution – the wonderfully-monitored Lovely Professional University⁷ – played to that stereotype.⁸ But an analysis of the results of the government-sponsored NIRF (National Institute Ranking Framework) rankings suggest that many private universities are closing the gap with public universities with respect to research.⁹

The other big change this year was the announcement of the first two batches of new branch campuses in the country. By May, fifteen institutions from Australia and the United Kingdom were given the go-ahead to start campuses, with Liverpool and Southampton being the first to receive Letters of Intent permitting them to actually open for classes¹⁰ (the Illinois Institute of Technology¹¹ and Italy's Istituto Europeo di Design¹² were also given the go-ahead to operate in the country).





A perennial issue that raised its head again this year in Indian education was the issue of deaths and suicides,¹³ many of which could be linked to “ragging” (i.e. hazing).¹⁵ One study emerged suggesting that over 50 deaths at Indian universities could be linked to ragging, with the problem being particularly prevalent at medical colleges.¹⁶ Casteism was on the agenda again as well, with some Dalit (untouchable) scholars prevented from obtaining their doctorates.¹⁷ Policy change was sought, but in the end, the changes made focused mainly on extending rules at public universities guaranteeing spots for certain castes and tribes to private institutions as well.^{18 19}

A final area of note was institutional autonomy. When India and Pakistan had a border skirmish in May and Turkish President Recep Tayyip Erdoğan voiced support for Pakistan, leading Indian universities tore up any academic Memoranda of Understanding they may have had with Turkish institutions, at a speed which suggested some central coordination.²⁰ Later in the year, the Union government, out of the blue, decided to try to alter the governing statutes of Panjab University in Chandigarh so as to shrink the largely elected Senate.²¹ Even though the move was quickly rescinded,²² massive protests then broke out²³ as the maneuver was interpreted as a means of Union overreach in the largely Sikh province.²⁴

Figure 5: Enrolments in Thousands, by Sector, India, 2010-11 to 2021-22

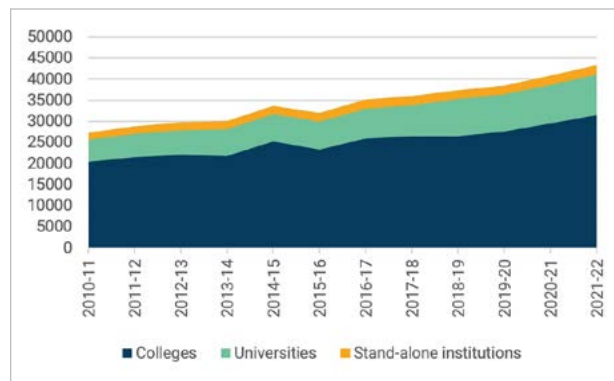
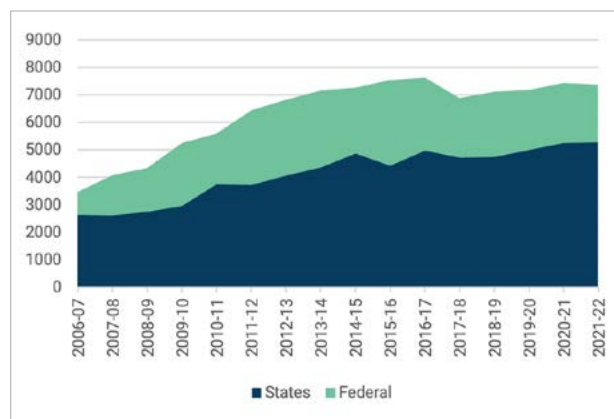


Figure 6: Public Expenditures on Universities, in Billions (₹2023), India, 2006-07 to 2021-22





Over the past two decades, Argentina has been a strong performer in terms of the expansion of its higher education system. As figure 7 shows, total enrolments rose from about 1.5 million to 2.7 million in the space of just 15 years, with similar growth rates in both public and private sectors. Until about 2017, public investment also rose substantially as well (see figure 8). However, it peaked early in Mauricio Macri's presidency and continued falling in real terms under the Peronist government of Alberto Fernandez. Although nominal appropriations kept rising, the relentless pace of inflation kept devaluing the actual sums allocated to universities, until by the end of 2023 they were only half what they had been at their height 8 years earlier. And this was all before the inauguration of Javier Milei.

Milei came to office with a strong mandate to contain inflation, which he attempted to do in part by freezing or curtailing public expenditure and allowing inflation to erode its real value. By mid-2025, officials in the university sector were estimating that this strategy has reduced university budgets by 30% in the previous 18 months.¹ This led to a series of protests, and limited time strikes from within the university sector.²

The mood changed when Congress – a body Milei can usually cajole but in which his La Libertad Avanza party lacks a majority – decided in August to begin debating a new law on university financing³, requiring the state to spend a little bit more than 1.2% of GDP on the sector⁴ (current expenditure is roughly half of that). The law passed by a wide margin.⁵ Milei then vetoed the legislation⁶, which Congress then overrode.⁷ That should have been the end of it, but Milei then issued a decree suspending the law on the (politically accurate but legally spurious) grounds that Congress had not indicated

where the money to pay for the measure was supposed to come from.⁸ A spate of lawsuits immediately ensued⁹, ensuring that the Supreme Court will have its say on the matter soon enough. This fight seems sure to run well into 2026, if not right to the end of Milei's mandate in December 2027.

Figure 7: Total Enrolments by Sector, in Thousands, Argentina, 2006-2023

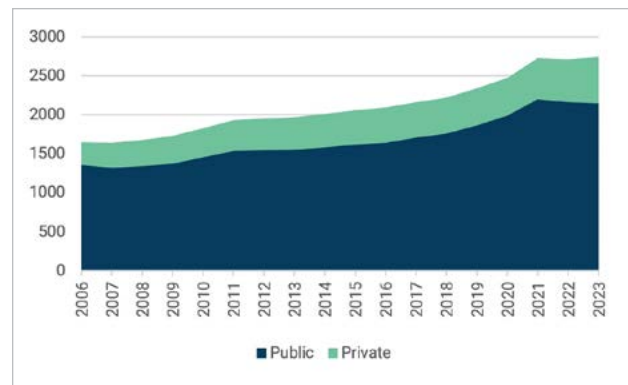
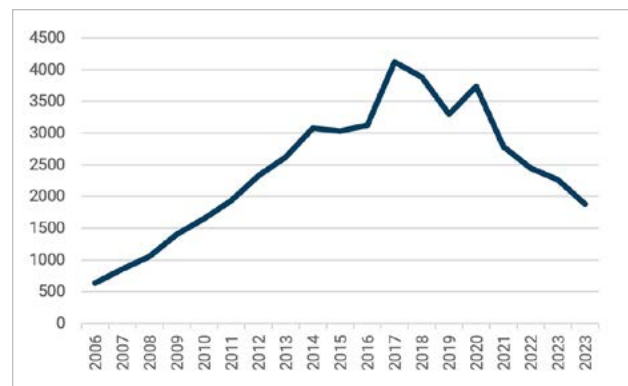


Figure 8: Total Budget Allocations to Universities, in Billions (AR\$2023), Argentina, 2006-2023





There were three key themes in Australia this year. Two of them are concerned with how to deal with the fallout from two of last year's big policy initiatives: the Universities Accord report and the issue of international students (believed by many to be the cause of a spike in housing prices). And the third – out of the blue in some, if not all, respects – was the issue of student debt, which got a big jolt in the federal election in May.

Late last year, the Commonwealth government seemed set to adopt a fairly aggressive set of caps, both nationally and at the institutional level. In the end, it had to settle for more indicative caps (still set so that overall numbers equal 270,000 new visas per year), in which institutions that approached the caps too quickly would see visa processing times for their incoming students slow substantially.¹ The system seems to be working tolerably well so far – at least, if the increase to 295,000 in August was any indication.² The university sector hopes for increasing flexibility – and less bureaucracy – as time goes on.

While rising rental prices led the Albanese government to move quickly on visas, it moved more slowly when it came to implementing elements of the “Universities Accord”³ announced in early-2024. The much-vaunted new sector regulator,⁴ The Australian Tertiary Education Commission, is still largely formless, and the previous government's unpopular Job-Ready Graduates funding scheme has yet to be replaced.⁵ Why has Labor been so slow? Well, while Labor is cuddlier than the Liberals, it doesn't seem much more inclined to spend real money – perhaps Albanese didn't want to advertise that fact in an election.

In the end, a centre-left government trounced a red-meat conservative opposition thanks to Trump showing how badly things could end up under such a government. One policy move that put Labor over the top was a promise to forgive 20% of all student debt⁶. This was a bit odd since under Australia's income-contingent system, reducing debt doesn't change the amount graduates pay, it just reduces the period over which they pay it. Still, it seems money to students/graduates is a bigger political priority than money to institutions.

Therein lies a problem: cuts are being introduced at a number of universities across the country as they deal with domestic funding at its lowest point in real terms since 2010 and declining international student numbers.⁷ That makes them understandably unpopular. Universities could improve their public standing by addressing the issues in governance that are attracting increasing political attention⁸ such as reducing CEO pay⁹ and paying employees what they are actually owed.¹⁰ Institutional polycrises, like the one that has overtaken Australian National University, should probably be avoided, too.¹¹ Otherwise, the second Albanese government might be even less accommodating than the first.

Figure 9: Enrolments in Australian Universities, by Sector, 2006-2023

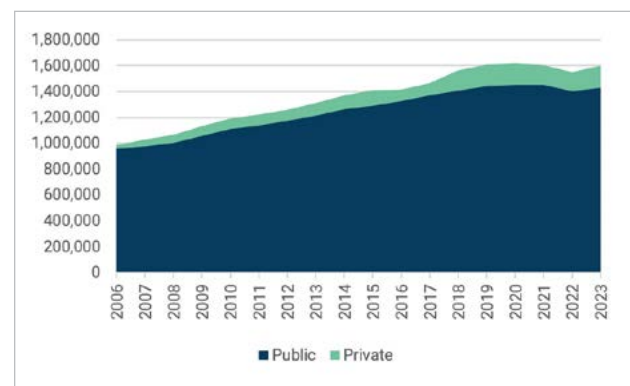
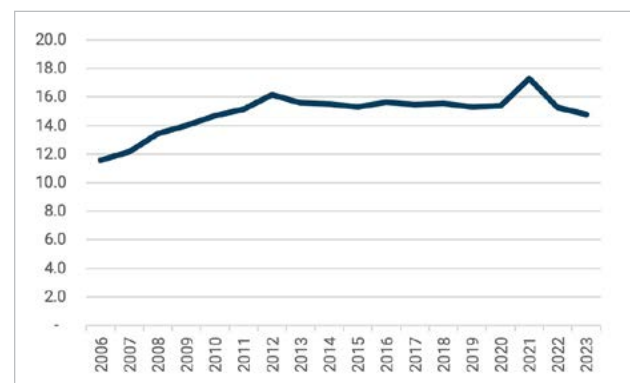


Figure 10: Government Grants to Australian Universities, in Billions (A\$2024), 2006-2023





Over the past two decades, Brazil has increased its university enrolments by over 100%, such that it is now clearly the world's fourth-largest higher education system, behind only China, India, and the United States. As shown below in figure 11, enrolments in 2024 topped 10 million students for the first time.¹ What makes Brazil distinct is the degree to which the access push is reliant on private institutions, and the degree to which access is growing due to online programming targeted at working-age Brazilians: in 2024, the system recorded that over 50% of enrolments were online for the first time.²

The reluctance of public institutions to grow is easily explained: as figure 12 shows, public financing for education has not been very steady in the past decade or so. Whether it was compressions related to the 2016 Olympics, or COVID, or the hostility to higher education institutions demonstrated by jailed former President Jair Bolsonaro, the country has yet to top the spending levels seen in 2013 (roughly 67 billion reais in 2024 constant value). That inevitably put the onus for growth on the private sector.

President Lula da Silva has done better by higher education than his predecessor, but the state's limited means have hamstrung him to some extent. In April, the government tried to economize on higher education by introducing a bizarre form of cash management which would have required universities to wait until nearly the end of the calendar year to receive most of their grant³, which would have been awkward because expenses like salaries can't be put off. Lula was so embarrassed that he not only reversed the measure but threw in some extra cash for good measure.⁴

The issues of race and racism in higher education remained in the news,⁵ even as a new book appeared describing the success of the use of quotas in higher education over the past twenty years.^{6 7} Several institutions have also tried using quotas to increase the participation of transgender and gender diverse students, although it appears this has not been particularly successful.⁸

And, finally, one of the strangest stories of the year related to students and access: a report suggesting that 34 percent of young people had at one point or another put off going to school because of losses on online gambling platforms⁹. Not everyone was convinced, however, that the study was correct.¹⁰

Figure 11: Enrolments by Sector, in Millions, Brazil, 2006-2024

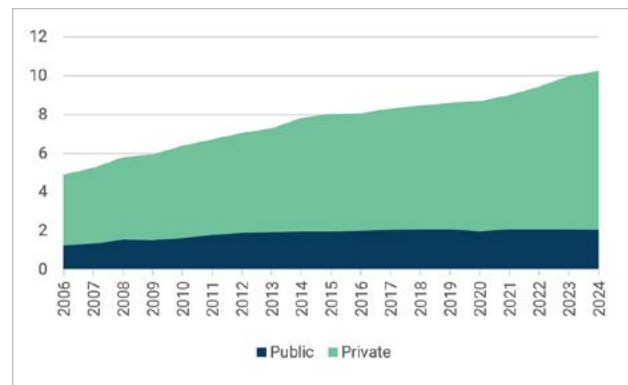
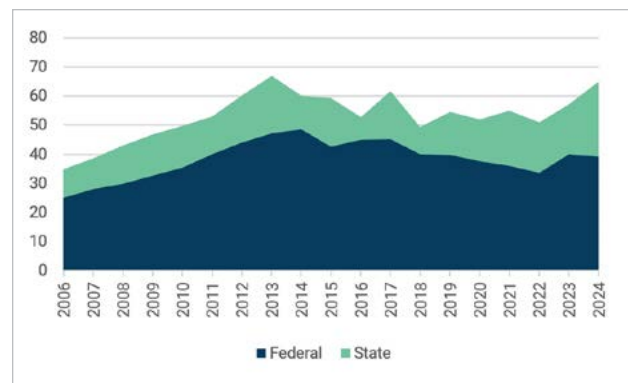


Figure 12: Expenditures on Post-Secondary Institutions, in Billions (R\$2024), Brazil, 2006-2024





Canada's higher education system has been growing slowly but steadily over the past twenty years both at the college and university levels (see figure 13). However, much of the growth over the last ten years in the college sector and of the last five years in the university sector has been due to international students. Domestic student numbers are, in fact, down somewhat since 2013.

The origin of Canadian institutions' search for international students is largely explainable by figure 14. Despite higher enrolments, public funding has been essentially flat in real terms for roughly fifteen years. In order to deal with rising costs, Canadian institutions took to recruiting international students in enormous numbers. In the decade of 2014-2024, the number of international students in Canadian post-secondary education rose by more than 150%. This led to a financially secure sector until the federal government intervened in 2024. Eager to cool a blazing housing market, the government first imposed visa caps,¹ then lowered them,² and then removed about half of all college programs from eligibility for the Post-Graduate Work Permit program.³ The government did this whilst proclaiming that Canadian colleges were a scam,⁴ which played well to a domestic market but wreaked havoc with the sector's reputation internationally.

To a large extent, Canadian post-secondary education policy in 2025 was concerned mostly with the ramifications of these decisions made by the federal Liberal government in 2024. The effect on enrolments was national – by late 2025 new entrants were down 70% from where they had been two years earlier.⁵ This was especially acute in Ontario, where international students made up over 50% of community college enrolments, and where hundreds of programs as a result.⁶ Universities were not as immediately affected as colleges – longer enrolment cycles mean that the full effect of lower incoming numbers takes some time to be felt – but the problem is building up. Ontario's universities are projected to be collectively \$265M in deficit this year.⁷ In British

Columbia, the relatively small Vancouver Island University is \$20 million in deficit this year,⁸ or about \$2,000 per student, on top of several previous years of deficits.⁹ A highly unionized faculty makes it difficult for universities to right finances quickly. At Dalhousie University, the administration locked out the faculty for twenty-seven days in order to rein in salary expansion.¹⁰

Politically, things do not look good for universities. The deeply unpopular Justin Trudeau resigned as Prime Minister in January 2025, which led to an April election with Mark Carney as the new party leader. The Liberals won with an increased seat count, but not a majority. Unfortunately, Prime Minister Mark Carney is not a particular fan of higher education, and the Liberal manifesto was probably the weakest for universities since 1993.¹¹ The new government's November 2025 budget refrained from cutting too much from existing research budgets, but it did cut \$1 billion CAD from student financial assistance.

At the provincial level, funding for post-secondary education continues to stagnate, staying even in real terms, but declining on a per-student, per-citizen, per-GDP, and percentage of total spending basis. An Expert Panel report on the Future of Post-Secondary Education Funding in Alberta suggested a new system based on a blend of input and output – i.e. performance-based criteria. In late November 2025, the Government of British Columbia announced a provincial review which appears to lean heavily on cost-cutting and elimination of program duplication as a solution to funding woes.

Two final stories of note. First was the Mastercard Foundation's decision to allocate \$235 million CAD across 30 Canadian post-secondary institutions to recognize and support impactful measures taken towards reconciliation.¹² Second was the decision of the Canadian Medical Association and the Association of Faculties of Medicine to delink its accreditation process





from the American Association of Medical College's Liaison Committee on Medical Education (LCME).¹³ The reason? Canadian institutions wanted to retain criteria related to Equity, Diversity, Inclusion, and Indigenization, and were concerned that their ability to do so would be compromised by restrictions placed on the LCME by the Trump Administration.¹⁴

Figure 13: Full-Time Equivalent Enrolments by Sector, in Thousands, Canada, 2006 to 2024

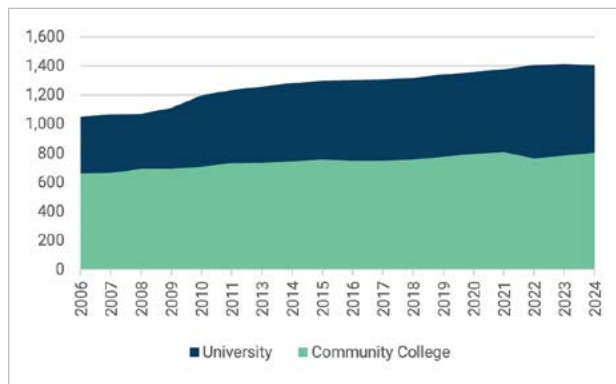
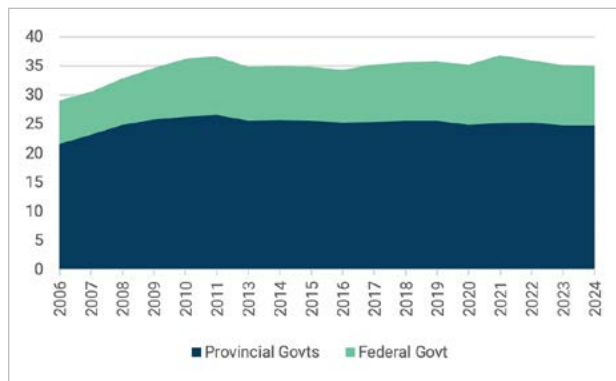


Figure 14: Total Institutional Income by Source, in Billions (CA\$2023), Canada, 2000-01 to 2023-24





Colombia is a case of a fast-developing country where participation rates have plateaued in recent years. As shown in figure 15, enrolments doubled in both the private sectors between 2006 and 2015, but since then growth has been negligible. This was mostly demography-induced as the youth (18-21) population began shrinking in 2017 or so. Public financing, however, has grown fairly steadily at about 3.5% per year since 2008 (see figure 16).

In policy terms, there are few better ways to describe Colombia this year than as Schrödinger's higher education system. A paucity of system-level data – which is not entirely new but seems to have got worse under the government of Gustavo Petro – makes it hard to answer basic questions about the state of the system.

Is funding up or down? Are student numbers up or down? The government continues to increase the overall budget for education,¹ but at the same time the national Comptroller's office says the main universities are billions of pesos in debt.² The University of Antioquia, which has been struggling for years – and was closed down by strikes for parts of 2024 – is still facing insolvency, with a budget deficit equal to about 9% of turnover.³ One possible reason for the discrepancy is that the Petro administration's theory of increasing access, similar to that of Andrés Manuel López Obrador and Claudia Sheinbaum in Mexico, is to increase the number of institutions⁴ and spaces. Unsurprisingly, making spaces rather than students the target of government policy means the government can control the figures more easily.⁵

It is a similar story with student loans, one of Petro's signature areas. Congress passed a law mandating ICETEX (the country's student loan agency which mostly services students at private universities) to lower interest rates, offer generous loan forgiveness, and adopt an income-contingent repayment system.⁶ However, almost simultaneously, the government actually raised student loan interest rates because it could no longer afford to subsidize them.⁷ In other words: policy may be more generous, but funding is not.

Figure 15: Total Enrolments in Thousands, by Sector, Colombia, 2006-2024

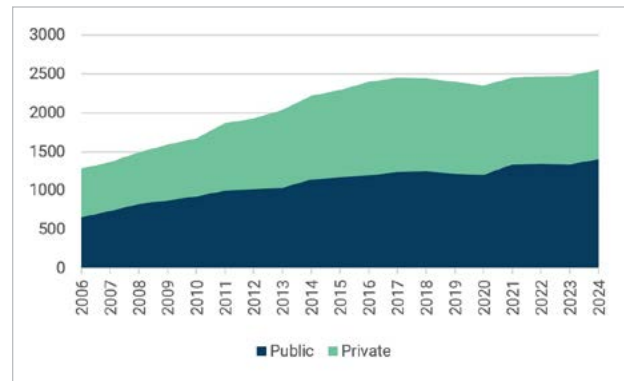
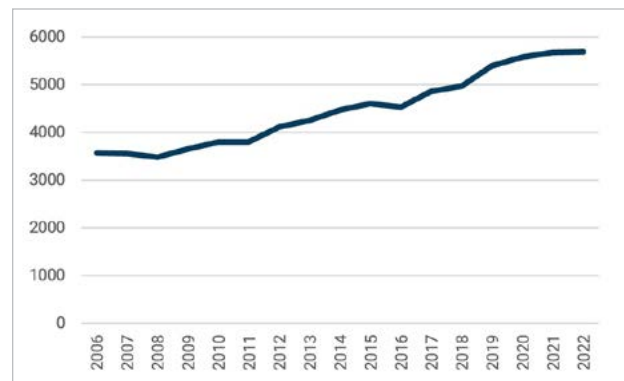


Figure 16: Public Funding for Universities, in Billions (COL\$2024), Colombia, 2006-2022





The French higher education system continues to grow, albeit in ways which would have seemed impossible three decades ago. As figure 17 shows, public-sector higher education numbers dipped in the mid-aughts before recovering through to about 2020 and have remained relatively constant since. Private higher education numbers, on the other hand, have grown sharply in the past few years and now cover roughly a quarter of all enrolments. As in Spain, part of the success formula for private education is that they have been aggressive in pursuing international students;¹ a more uniquely French aspect to private sector growth is its presence in the apprenticeship (“alternance”) sector,² which is considered to be at the tertiary level in France. Thanks to private-sector growth, total enrolment passed the three million mark for the first time in 2024.³

The flattening-out of public-sector enrolments is in part a product of the stagnation in public investment. As figure 18 shows, current expenditures in real dollars have been largely unchanged since about 2015-16. Of course, costs have risen since then and continue to do so.⁴ As of fall 2025 close to two-thirds of all French public universities reported being in deficit.⁵ Even the Minister admits the current budget model is under stress,⁷ and the government is considering radically increasing the (currently nominal) level of tuition fees.⁸

The growth of the private sector means public universities are circling the wagons, and asking for tighter regulations.⁹ The main attempt to do so this year was to make it more difficult for private institutions to get prominent placement on parcoursup, the government’s university admissions portal.¹⁰ However, the fall of the Bayrou government meant the relevant legislation was not enacted.

In other developments, acts of alleged antisemitism in universities attracted attention throughout the year (one glorifying October 7th was the most egregious)¹¹ and

Parliament passed a law against it in universities in early July.¹² And in April, the country’s extreme left- and right-wing parliamentary factions joined together to vote to eliminate the country’s independent academic program evaluator, the Haut Conseil de l’évaluation de la recherche et de l’enseignement supérieur (Hcéres).¹³ This move was applauded by faculty but universally condemned by universities and the Ministry of Higher Education (the latter not least because it was counting on HCERES to put into action its plans to regulate privates on Parcoursup).¹⁴

Figure 17: Total Enrolments, in Thousands, France, 2000-01 to 2024-25

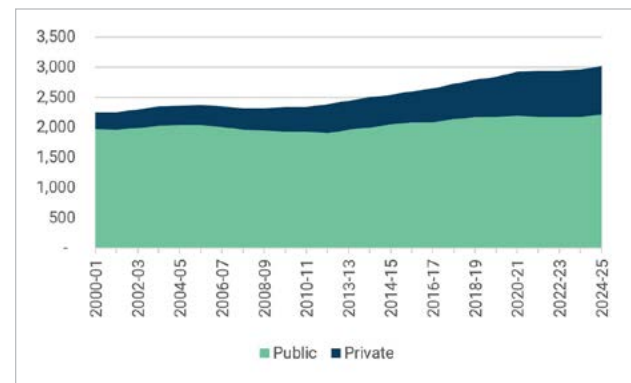
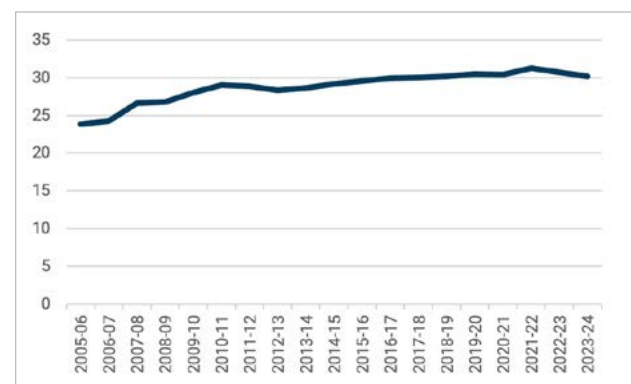


Figure 18: Public Expenditures on Higher Education Institutions, in Billions (€2024), France, 2006 to 2024





Enrolment in German higher education – including both universities and Fachhochschule – peaked during the COVID-19 pandemic and has shrunk by about 80,000 over the past few years (see figure 19). The fall would have been larger but for the increase in enrolments in the private higher education sector, which now educates 13% of the total student body. As shown in figure 20, total funding for higher education was also down about 5% between 2020-24, mainly due to a decline at the federal level. In 2025, budget stress at the state level led to a number of states cutting funding for higher education by anything up to about ten percent.¹ In Berlin, the cuts were severe enough that the Technical University there actually sued the state government to recover lost funds.² State budget stress is also creating problems for a new round of funding for the German Research Foundation (DFG) which relies on contributions from both levels of government.³

The biggest single news story for universities this year came with the selection of project winners under the country's Excellence Strategy. Out of 98 applications (mostly from single institutions, with a few from alliances of two or more), 70 were chosen, which is a high ratio for this kind of selection process;⁴ Bonn, Tübingen, and the two large Munich universities were the big winners.⁵ At about the same time though, an op-ed in Der Spiegel asked whether the program actually achieved anything⁶ and a spokesman of the CDU/CSU group – part of the governing coalition – suggested the program might have outlived its usefulness.⁷

Late in the year, the government announced a new "hi-tech agenda" worth 18 billion euros to create industrial competitiveness in six big technological areas.⁸ Details, however, were scarce, suggesting the government did not really know where the money was to be spent, and in particular how much money might end up with universities.⁹ One organization that might get less than expected is the Fraunhofer Gesellschaft, which is under investigation for misuse of funds.¹⁰

Student aid made the news when the percentage of students using BAföG fell to about one in six students,

its lowest level in over two decades.¹¹ This was not due to higher education attendance skewing richer; research suggests that half of all eligible students do not apply for student aid, mainly because they do not understand that they are eligible.¹²

Private money funded two specific new departures in higher education this year. The University of Potsdam accepted money from SAP chief executive Hanno Plattner to build a new campus, which is expected to make the university a leader in the field of Artificial Intelligence.¹³ Also announced was a new university to service the needs of the country's Kurdish community, to be opened in 2026.¹⁴

Figure 19: Total Enrolment by Sector, in Thousands, Germany, 2006 to 2024

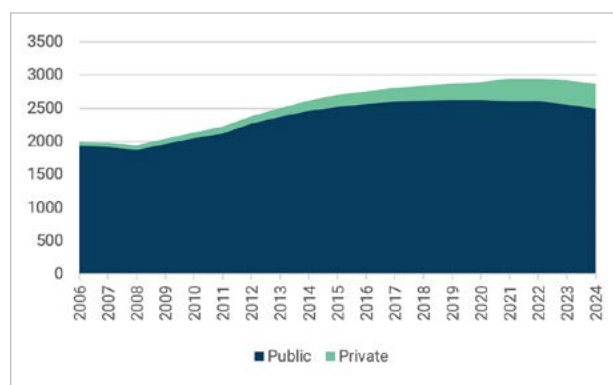
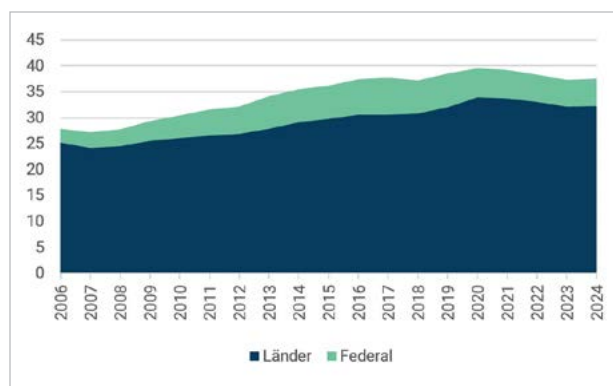


Figure 20: Public Expenditure on Higher Education Institutions, in Billions (€2024), Germany, 2006-2020





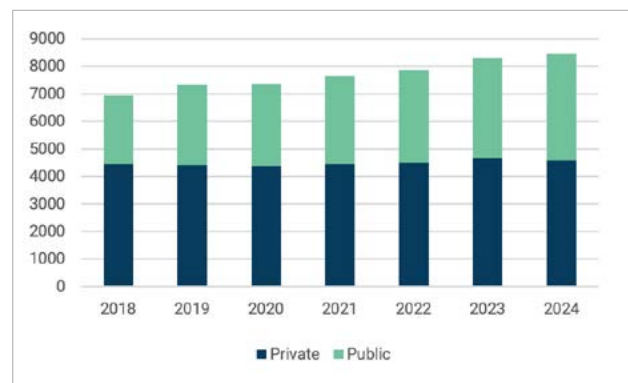
Indonesia – with the world’s fifth largest higher education system – continues to see significant growth, with total enrolment growing by 1.5 million between 2018 and 2024 (see figure 21). Contrary to trends in other parts of the world, essentially all of this growth is happening in the public sector. This growth in public institutions is not due to increasing public funding; rather, it is due to a policy known as *Jalur mandiri*, a form of dual-track tuition which allows public universities to charge something like market tuition rates to “self-funded” students who do not qualify for the subsidized spots.¹ The expansion of spaces due to this policy means students can now attend prestigious publics for the same price as less-prestigious privates; it has been reported that enrolments in private institutions fell by another 25% in 2025 due to this policy.² However, the extra money in the public system has also led to accusations of bribery and the removal of at least one rector.³

Indonesia has reached the stage of industrialization where it has started to realize the need for more researchers backed by greater investment, and a concomitant rise in university-industry interaction.⁴ This year, the government mused about more than tripling investment in research to 1% of GDP⁵ and having “top 100 universities”,⁶ urged universities to work more closely with industry⁷, and signed a memorandum of understanding (MOU) with China to advise them on research commercialization.⁸ But change takes time, and funding is far from guaranteed – in the meantime, the country faces a classic brain drain situation.⁹

Student protests were a significant feature of the higher education scene this year. In August, students protested corruption and inflation, a local echo of the so-called “Gen Z protests” which spanned much of the globe in the late summer and early fall. One student died in a clash with police;¹⁰ the Minister of Education Brian Yuliarto – who replaced the previous Minister when the latter was accused of improperly dismissing a civil servant¹¹ – then made a point of telling police that student protest should be allowed.¹²

More peculiar was the wave of protests that occurred in the first half of the year with respect to allowing universities to acquire mining permits without bidding. In theory, this policy would have allowed universities to lower tuition;¹³ however, for obvious reasons, it also raised the specter of potential corruption.¹⁴ Following a wave of student protests,¹⁵ the law was eventually modified so that universities would not hold permits directly but still benefit from the proceeds,¹⁶ a solution which, at least superficially, resembles something like the University of Texas’ Permanent Endowment Fund.¹⁷

Figure 21: Total Enrolments by Sector, Indonesia, 2018-2024





Iranian higher education has not been having a good run in recent years. As figure 22 shows, student numbers have tumbled by over 35% since their peak in 2015.

That's only partly because of demographics (Iran did experience a massive drop in its total fertility rate from seven live births per woman to under two in the 80s and 90s, but most of it happened before the 2015 cohort was born¹). More seriously, the rate of return on degrees simply doesn't look as good as it used to and students are staying away.

The combination of fewer students, inflation and stagnant government financial support is creating a toxic operating environment for universities. In the public sector, physical deterioration of university premises and privatization of some university services seem to be the dominant coping tactics.² It also appears to be leading to a major exodus of faculty from the country³ as well as a decline in research output,⁴ reversing a couple of decades of steady progress in this area.⁵ In the case of the semi-private (i.e. legally private but controlled by individuals close to government) Islamic Azad university, massive tuition increases seem to be the order of the day.⁶

The decline in domestic funding is possibly the reason that Iran is ramping up international student admissions to record levels,⁷ with India being a particular target market for medical schools⁸. There has been backlash to at least some of the newcomers: protests erupted on campuses earlier this year in response to the behaviour of some Iraqi students, believed to be militia-related.⁹

One final point of note: just before the start of the fall term, the Ministry of Intelligence banned students of Baha'i faith from study at the country's universities, citing vague and spurious national security concerns.¹⁰

Figure 22: Total Enrolment, in Thousands, Iran, 2006-2023





Enrolments in Italian public higher education have been in decline for some time, but, as figure 23 shows, total enrolment is still increasing to record levels because of the growth of enrolments in private higher education. For the most part, this boom is being driven by older students enrolling in online programs: as of 2024-25, when enrolments surpassed 2 million for the first time¹, 16% of all students in the country were in such online programs.² Public funding remains a problem, however. As figure 24 shows, despite recent increases, government spending on higher education remains lower in real terms than it was prior to the Great Financial Crisis of 2008.

Inequality in university admissions – an especially large problem in a country with low social mobility – reared its head as an issue again this year.³ From an analytical perspective, the most interesting piece of work out of Italy this year was the analysis of the country's Dipartimenti di Eccellenza program, which ran from 2018 to 2023.⁴ It turns out that giving largely strings-free grants to departments for a period of five years can significantly increase research output, but it does very little to encourage faculties to create new and innovative programming/curricula.⁵

At the policy level, the main story this year was the government's decision to issue a decree with respect to the country's peak higher education regulatory agency, known as the Agenzia Nazionale di Valutazione del Sistema Universitario e della Ricerca, or ANVUR.⁶ Ostensibly the reform was about streamlining processes and increasing efficiency and flexibility, but opponents say that it turns an independent regulatory agency into

an agency of government control. Parallel to this, a government working group headed by historian Ernesto Galli della Loggia has issued a set of recommendations including increased presence of government appointees on university governing boards and longer terms of office for university rectors.⁷ How this plays out will be decided in 2026.

Figure 23: Total Enrolments, in Thousands, Italy, 2000-01 to 2023-24

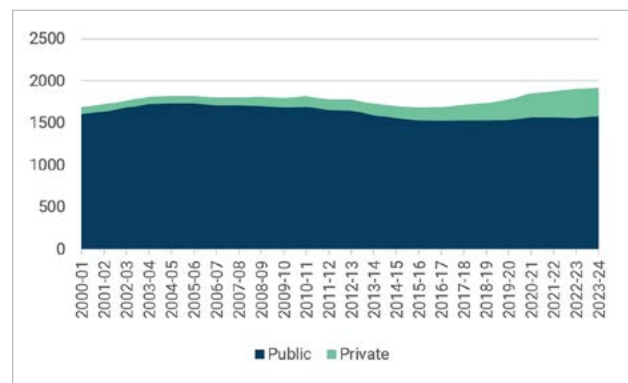


Figure 24: Public Expenditure on Universities, in Billions (€2024), Italy, 2008-2024





Despite a shrinking youth population, Japan has managed to keep enrolments stable over the past couple of decades (see figure 25). In this sense, it stands very much apart from other aging East Asian countries like South Korea or Taiwan where shrinking student populations and institutional closures are the norm. As for government funding (see figure 26), the Japanese government is decreasing normal recurrent funding to universities while at the same time increasing total funding. The secret here is to make put all new money (and some of the old) into a competitive funding envelope. This is part of a general strategy, one developed in stages over the past two decades, to make institutions more strategic in their decision-making.

As in many other Asian countries, a substantial portion of this year's policy discussions revolved around how the country could boost its global standing by attracting some of the talented international students the Trump administration seemed determine to drive away.¹ To that end, the government eased caps on the number of international students institutions could take in.² However, the antiquated state of Japanese admissions procedures³ and the government's bizarrely-timed decision to withdraw financial support from international graduate students⁴ worked counter to that policy goal.

Policy innovation in other areas was mixed, too. In 2023, the government set aside just over 10 trillion yen (\$US 65B) in a permanent endowment fund, with the notion that certain qualified institutions would have access to interest on the funds.⁵ Tohoku University was the first to qualify in 2024, but future access has been put in

question as the returns on endowment have been below expectations.⁶ In a separate policy initiative, the Japanese government has decided to try to encourage more students to try graduate studies by revising curriculum rules in order to make it possible for students to graduate from both a bachelor's degree and a master's degree in three years.⁷

Figure 25: Total Enrolments by Type of Institution, in Thousands, Japan, 2006-2024

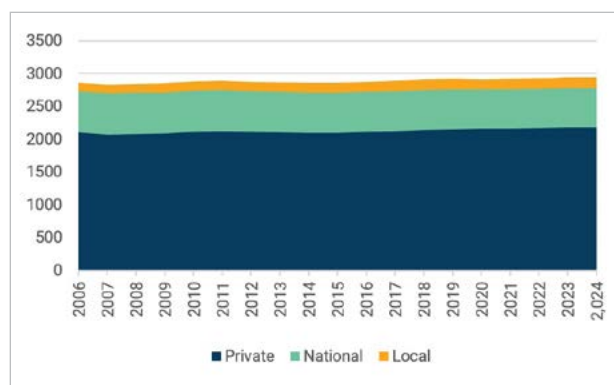
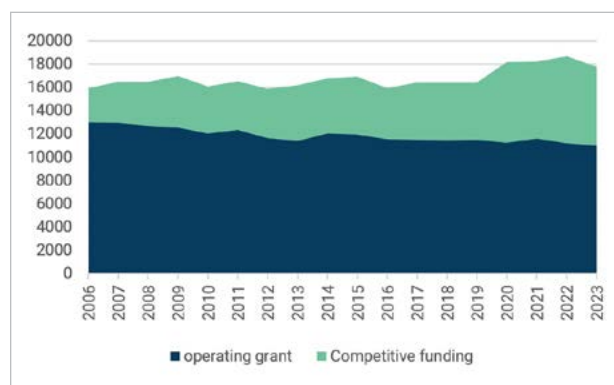


Figure 26: Government Funding by Type, in Billions (¥2024), Japan, 2006-2023





Kenya's story in 2025 was all about money – and lack thereof. In 2020, the government began casting around for a new way of funding universities as student numbers began to vastly outstrip the capacity of the government to pay for them. Universities began taking out loans independently to cover the missing costs which left them with significant debts of over KSh 70 billion (USD \$540 million).¹ In 2023, as part of a general rethink on education and education-spending, the government chose to implement something called the Variable Scholarship and Loan Funding system.² This was a tuition-driven voucher-system, where the vouchers were part-grant and part-loan, with the balance between loan and grant driven by the student's family income. Imagine the English system of university finances if subsidies were driven not by lifetime income but by parental income and you'd be fairly close. Overall, it was a reasonably progressive approach, though as in England, sticker shock was a problem.

Chaos accompanied the launch of the system when, in late December of 2024, when the Supreme Court voided the new funding formula because it was unconstitutional.³ The government got a stay on the ruling, but not until late March.⁴ In the meantime, universities waited months to get paid.⁵ Changes to the system ensued,⁶ but by then universities were in deep trouble: in April, the Technical University of Kenya was declared insolvent by Parliament; in May, Moi University laid off over 900 employees;⁷ and, by July, the Treasury was warning that some public universities might fail entirely.⁸

The government's response was first of all to blame universities for lavish spending and poor hiring policies,⁹ to make unrealistic calls for more research commercialization,¹⁰ and generally to shift blame while at the same time claim the whole crisis would be over shortly.¹¹ At the same time, it chose to permit more students to attend university,¹² thus exacerbating an existing problem with student/staff ratios,¹³ and to reduce tuition fees by anything up to 50%. Because of the voucher system, this was in theory largely cost-neutral to government and potentially so to universities, but it has never been made public how this move was being financed.

Then, in fall 2025, at the beginning of the academic year, university lecturers went on strike over missing backpay.¹⁴ At first, the government tried to deny the scale of the missing backpay, but after seven weeks of work stoppages, it essentially conceded to all the main union demands.¹⁵





Malaysia has four main types of higher education institutions. In the public sector, there are three types: universities, polytechnics, and colleges, with the latter two being relatively peripheral in terms of enrolments. The private sector is composed simply of universities, but this sector is quite volatile in terms of enrolments and has experienced two significant periods of enrolment loss, one related to the 2009-9 recession and the other to COVID-19, as shown below in figure 27. Overall, the system can be said to have shown very strong growth up to 2015, but very little thereafter.

Though enrolments at public institutions have been more consistent than at privates, the public funding supporting those institutions has been highly volatile. As figure 28 shows, Malaysian public education works on a kind of punctuated equilibrium – that is, stability for short periods but also sudden upwards or downwards jags of 30-50%. This is quite unlike any other system of education examined in this volume.

The dominant story in Malaysian higher education this past year has been with respect to how rising international enrolments have upset the delicate balance of race relations in the country. Ever since a bout of ethnic rioting in 1969¹, the Malaysian government has given preferential access to public universities to students of Malay or Indigenous (known together as “Bumiputera”²) ancestry by running what amounts to two parallel systems of secondary matriculation - one for Bumiputera and another, more difficult, system for the Chinese population. Malaysian Chinese have traditionally accepted this as the price to pay for existing in a multi-racial society. However, as the number of international students has increased, particularly at prestigious public universities³, the Malaysian Chinese Association (MCA) has protested that these new students are being accommodated at the expense of non-Bumiputera students,^{4 5} a charge that gained potency after a top-scoring Chinese Malay student was not placed in his preferred program at any top public university.⁶ This led to some acrimonious exchanges between the MCA and the Ministry over whether or not international students are pushing out local students.⁷ This controversy seems likely to carry into 2026 and beyond.

There have been two other significant stories from Malaysia in the past 12 months. The first has been the development of a new 10-year plan for higher education,⁸ which was originally meant to come into force this year but has now been delayed until 2026. The second was the announcement by the government of Sarawak province of a system of free tuition.⁹ Though it did not encompass quite all universities or all programs in the province, the 600m rupiah commitment is a serious one and will eliminate most financial barriers for most students.¹⁰ Whether this actually increases access, however, remains to be seen.

Figure 27: Total Enrolments in Higher Education, in Thousands, Malaysia, 2006-2024

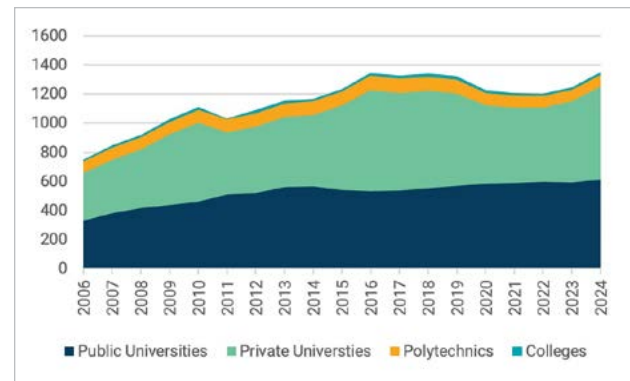


Figure 28: Total Expenditure on Higher Education Institutions, in Billions (RM2024), Malaysia, 2009-2024





Over the past twenty years, the Mexican higher education system has grown in a strong and steady manner. As figure 29 shows, since 2006, public university enrolments have risen by 130%, while private university enrolments have doubled. In 2025, the most significant area of growth was in the UTyP sector (Technological and Polytechnic universities), where growth in enrolments was over 10%.¹ This increase in interest in the polytechnic sector may be coming at the expense of more traditional universities; applications to the country's largest and most prestigious university, UNAM, are down 30% in the past five years.²

System funding is a particular problem and has been more or less since the left-populist National Regeneration Movement (or "Morena") came to power in 2018. As figure 30 shows, during COVID-19, the party allowed real transfers to higher education to fall by 25%, and then never allowed the figure to rise again in real terms. It also allowed funding for science and technology to drift downwards to the point where this year it fell to just 0.16% of GDP, a two-decade low.³

In essence, the government seems to want to expand higher education entirely through the creation of new types of institutions: the Universidad Nacional Rosario Castellanos⁴ and the Universidades para el Bienestar Benito Juárez García⁵, two multi-campus institutions created by the Morena government specifically for the purpose of extending access to underserved populations. President Sheinbaum also this year inaugurated an online platform for delivering higher education courses called *Saberes X*.⁶ The plan, clearly, is to spend money outside the existing system of universities. And when universities complain, Sheinbaum – herself a former academic – responded with some memorable one-liners about how institutions and academics need to learn to abandon “the trappings of power and privilege” and work with “republican austerity”.⁷ The level of distrust between the government and academia now runs very deep.

Figure 29: Total Enrolments by Sector, in Thousands, Mexico, 2006-2024

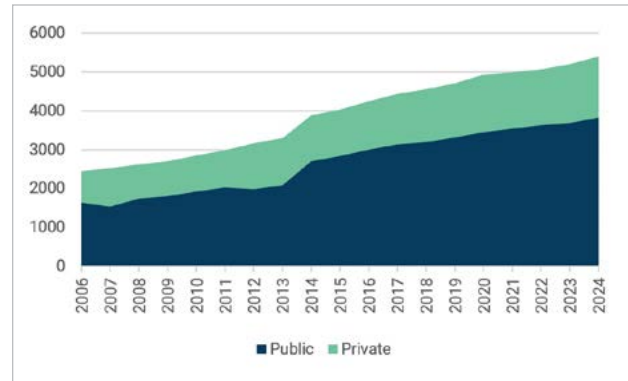
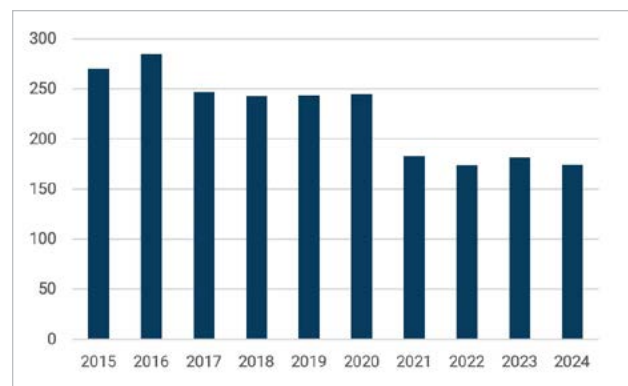


Figure 30: Federal Government Expenditures on Higher Education Institution, in Billions (MEX\$2024), Mexico, 2015-2024





We don't know much about enrolments or financing in Nigeria because the Nigerian government is – of all major economies in the world – the worst at publishing data on higher education. The most recent data for enrolments was published in 2021 and covered the 2019 school year.¹ According to that survey, there were nearly 2.2 million students; presumably, there are more now. As for financing, data is almost never consolidated or made public. What we do know, however, is that faculty at public universities in Nigeria are the worst-paid in the continent,² and therefore the world. Average salaries remain at about \$4,400 per annum, roughly where they were 15 years ago.

It is therefore not surprising that Nigerian universities are a hotbed of labour activism. Prior to 2025, there had been sixteen national academic strikes in the previous twenty-five years, some of them lasting as long as a year.³ This year, the Academic Staff Union of Universities began warning in the late summer that another strike was on the way,⁴ one which began in the second week of October. The strike was suspended after two weeks, with the union giving the government a month to meet its demands or face another one.⁵ The government has offered pay hikes of 35%, but the union views this as inadequate and wants to see a reversal back to 2009 levels in real terms.⁶ With public universities in such a shamble, calls for private universities to take over more of the burden grew louder,⁷ as did calls to allow them access to federal infrastructure funding.⁸ In this context, the impending arrival of an Indian Institute of Technology campus was thus obviously seen as good news.⁹

Despite the evident problems in funding existing universities, state governments and the National Assembly eagerly pressed for new universities, presumably because a new institution is a new opportunity for patronage. In April, President Tinubu approved 67 new universities,¹⁰ but when shortly thereafter the Assembly began musing about the need for 200 new universities,¹¹ Tinubu changed his mind about the wisdom of continued proliferation. By late August, he had issued a seven-year moratorium on new universities,¹² and his political allies were urging state governments to do the same.¹³ Just a few weeks later, however, Tinubu broke the moratorium and waved a new university into existence¹⁴ (although this was later excused on the grounds that the new university was already “in the works” when the moratorium was announced).¹⁵

Not all issues that cropped up during the year were related to financing. One concerned allegations about bribery and malfeasance at the National Universities Commission (NUC) as it carried out its accreditation functions.¹⁶ In an unrelated matter, the NUC executive secretary and several others were charged with contempt of court charges with respect to a personnel matter.¹⁷ The National Assembly passed a quite harsh law banning sexual harassment on campuses.¹⁸ And Olabisi Onabanjo University (OOU), in the southwestern Ogun, made the news for trying to enforce a “No bra, No entry” policy for its female students.¹⁹





Pakistani enrolments in higher education have been falling for several years now. As figure 31 shows, they hit a high of about 2.3 million students in 2021, but since then the numbers have been in significant decline and have now fallen to about 1.9 million. This drop in student numbers – which does not appear to be driven by any concomitant demographic changes – mirrors similar sudden drops seen in neighboring Iran, and Türkiye, and stands in stark contrast to the pattern seen in most developing countries. The drop may not be finished: in 2025, there were reports that universities in Punjab were seeing application declines of 20-30%.¹ Peshawar universities were actually banned from new recruitment because of the state of institutional finances.²

As figure 32 shows, there has been a cataclysmic decline in university funding since 2018. The culprit is inflation – nominal expenditures have stayed relatively even over the past few years, but the declining purchasing power of the rupee means that real expenditure has fallen by about 40%. The country's flagship university, Quaid-i-Azam, required a mid-year bailout;³ at around the same time, universities in Sindh announced they could no longer pay out regular bonuses to faculty who held doctorates.⁴

Despite falling student numbers, Pakistan seems very concerned about attracting new foreign campuses. In the fall, the government of Punjab announced that universities from South Korea, Kazakhstan, as well as four from the United Kingdom, had all agreed to set up campuses in the province.⁵ This was seen as a part of the province's recently announced plans to become a regional higher education hub.⁶ Unfortunately, just a few days later, all of four of those UK universities issued statements saying they had no plans to set up campuses in Pakistan.⁷

In a yet stranger story of a new university, there was the case of the new Daanish University. In 2019, a Pakistani property tycoon handed over £190m to the UK authorities in order to stay out of jail.⁸ In early 2025, this money made its way back to the Pakistani government, which determined that the money should be used to create a new university.⁹ It would not just be any university: the

money was to be given to a non-profit which runs schools for underprivileged youth in Punjab, which just happened to have been founded by the Pakistani PM when he was Chief Minister of that province.^{10 11} Given the state of national higher education finance, not everyone agreed this was the smartest use of the money.¹²

Among the other issue in Pakistani higher education this year was university autonomy. In Sindh, the provincial government passed legislation permitting government to appoint ex-public servants as University Vice-chancellors,¹³ a move which provoked a strike from academics.¹⁴ Stories about patronage¹⁵ and nepotism¹⁶ in university hiring were also common.

Figure 31: Total University Enrolments, in Thousands, Pakistan, 2006 to 2024

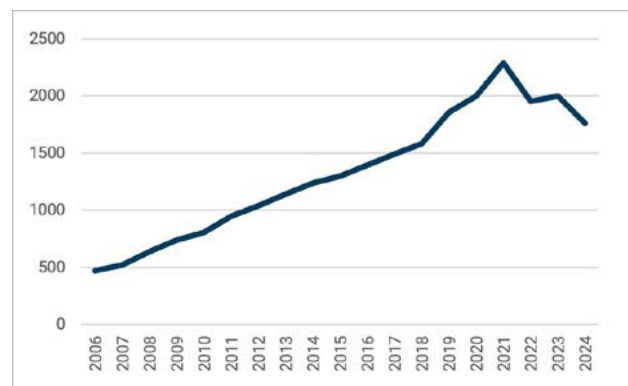
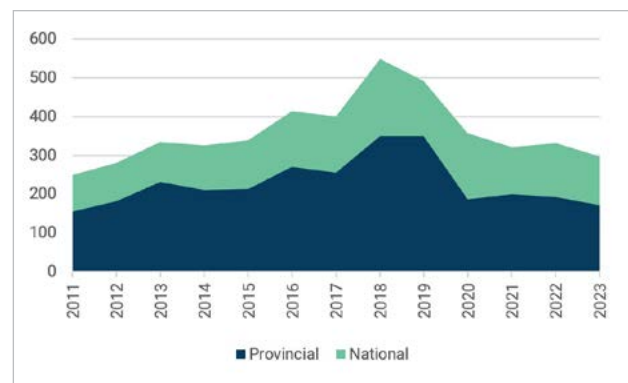


Figure 32: Public Expenditure on Universities by Source, in Billions (Rs2024), Pakistan, 2011 to 2023





Student enrolment in South Korean higher education peaked at just over 3.7 million students in 2012 and has been declining steadily ever since (see figure 33). Most students are enrolled in universities, rather than in junior colleges and other specialized forms of institution, and this has increasingly been the case over time: universities enrolled 77% of all higher education students in 2024, compared to just 62% in 2006. The cause of the decline is straightforward and has been understood for a long time: declining birthrates since the 1980s mean adverse demographics today's universities.

The main way this is affecting the sector is through what are known as “zombie colleges”¹, a media term invented to describe those private colleges which are too small to be effective, but which are reluctant to close because it would mean their owners would have to return certain assets to the state. According to one account in late 2025, 11% of the country's universities were below 50% capacity.² This situation prompted the government to adopt a new law which would give the government the ability to both compel closure of universities and provide owners with some compensation.³

Another way changing demographics are affecting South Korean higher education is by pushing universities to aggressively seek international students,⁴ which in 2025 hit a record 300,000 or about ten percent of the country's total student body.⁵ One signal of the ferocity of competition for international students is the Korea Times' new ranking of the country's universities, which was specifically targeted at international students,⁶ with over 60% of the weighted indicators being directed related to “globalization”.⁷

As figure 34 shows, despite the decline in enrolment the government of South Korea has been greatly increasing funding for both student assistance and higher education. Upon taking power, President Lee Jay Myeung – who replaced Yoon Suk Keol after his impeachment in late 2024 – indicated his interest in the concept of creating “10 Seoul National Universities”⁸ – a code for upgrading universities outside of Seoul to world-class status. In June, he appointed Lee-Jin Sook⁹, former President of Chungnam National University in Daejeon (one of the institutions that would likely be upgraded

under such a scheme), to be his Minister of Higher Education. Many commentators panned the plan as unrealistic,¹⁰ but with the amount of money the government is currently spending on higher education, there's no reason that government budgets couldn't be spread around somewhat more widely. Meanwhile, Seoul National itself is questioning its own model of education, moving to greater pay-for-performance¹¹ and more emphasis on globalization.¹²

A final major story from South Korea this year has to do with the end of a major strike, started in 2024, by medical students who were protesting the expansion of spaces in the country's medical schools.¹³ The fundamental issue – public rationales aside – was one of rent-seeking: future doctors unwilling to see their potential future income diluted by an increase in the supply of medical professionals.¹⁴ Indeed, medical studies are so lucrative that demand for medical spaces is red-hot in Korea.¹⁵ The government gave in to students in March and reversed the plans to increase doctor numbers in March 2025, but a final end to the walkout did not occur until July.¹⁶

Figure 33: Higher Education Enrolments by Sector, South Korea, 2006-2024

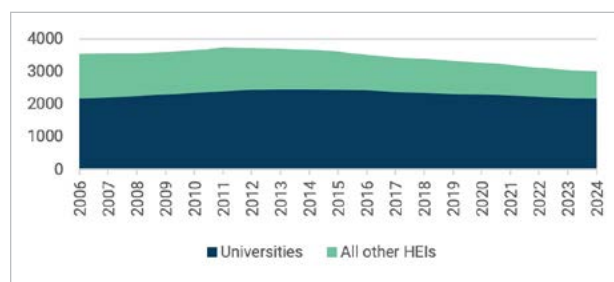
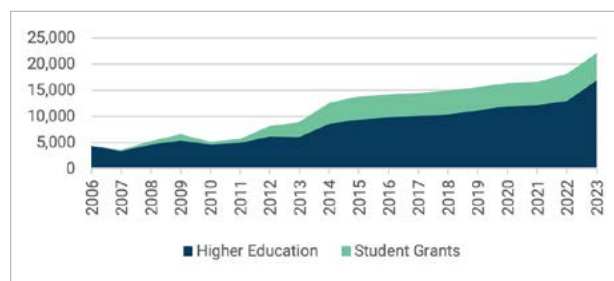


Figure 34: Higher Education Expenditures by Type, in Billions (₩2024), South Korea, 2006-2023





Between 2009 and 2019, Russian higher education experienced one of the most severe declines in enrolment ever recorded, with total enrolments dropping from 7.5 million to just over 4 million (see figure 35). The private sector took the hit disproportionately, losing nearly three-quarters of its students during this period. New regulations issued in the summer of 2025, allowing public universities to accept more students at market tuition rates, are expected to reduce enrolments in the private sector even further.¹ In contrast, as shown in figure 36, while public funding for universities declined in the mid-2010s (a consequence of lower oil prices), it later mostly rebounded to its earlier levels, meaning per-student expenditures are now substantially higher than they were when enrolment was at its peak.

Stories about the general decline or impending doom of Russian higher education were rife this year.^{2 3} Indeed, the Putin regime seemed to go out of its way to feed such stories, for instance with FSB (secret police) auditing the publications and speeches of all academics at Moscow State University,⁴ requiring all students to take a “patriotic education class”,⁵ and contracting the Higher School of Economics (HSE) to develop a methodology for “monitoring and assessing students’ attitudes towards traditional spiritual and moral values of society.”⁶ HSE was once one of the more reliably liberal institutions in the capital, but it made the headlines in the summer of 2025 for setting up a new master’s degree program in “sanctions risk management” and a certificate program in “sanctions compliance”,⁷ a move that itself landed the institution on the EU sanctions list.⁸ The expatriate blog t-invariant followed up with a devastating portrayal of HSE rector Nikita Anisimov, the rector of HSE who has turned the institution into a regime lapdog.⁹

The War with Ukraine continued to have effects on higher education in Russia. The government’s need for more soldiers is driving changes to the rules on conscription, which in turn will have an effect on university entrance criteria and university degree lengths.¹⁰ In addition, universities are also being required to accept returning

veterans without reference to their academic ability.¹¹ Perhaps a larger change is the way universities are being roped into the country’s foreign-policy efforts. Russia has been making nice with developing-world countries (whose votes are important at the United Nations) by offering scholarships to their students. From Sri Lanka¹² to Bangladesh¹³ to Kenya and elsewhere, there is a consistent pattern to this behaviour, but it is of particular importance in Africa.^{14 15} Not coincidentally, there are also serious scholarship scams, under which African students are offered fake scholarships and then conscripted into the Russia armed forces and used as cannon-fodder in Ukraine.¹⁶

Figure 35: Total Enrolments by Sector, Russia, 2008-2024

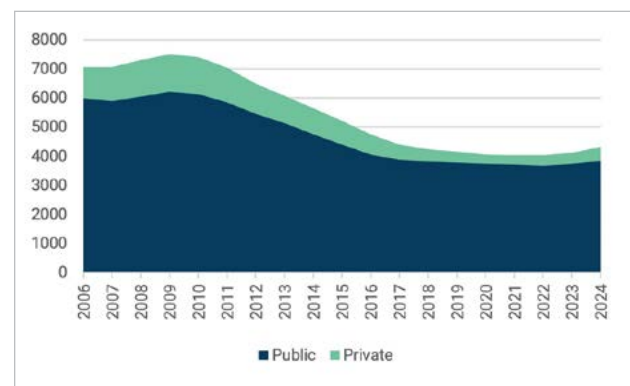
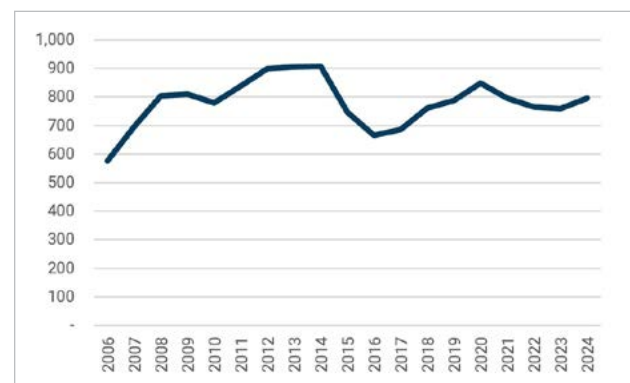


Figure 36: Public Funding to Higher Education, in Billions (₽2024), Russia, 2006-2024





South African higher education has been growing steadily in overall capacity but, as in Spain and France, that burden has fallen mainly on private institutions in recent years. As figure 37 shows, since 2006, private universities have increased their share of total enrolments from 9% to 21% of a significantly larger system. In absolute terms, enrolments in private institutions have quadrupled since 2006. Meanwhile, public institutions – including traditional and comprehensive universities, universities of technology, and the online University of South Africa (Unisa) – stopped growing in 2016. Not coincidentally, that was the year in which the government froze tuition fees as a response to the #feesmustfall movement. In financial terms, figure 38 shows that South Africa belongs to that set of countries where – like China – the onset of COVID-19 led to a reduction in spending of roughly 10% in real dollars that has yet to be made good. Combined with the tuition fee freeze, public universities are operating on about 15% less per student than they were pre-pandemic.

The funding challenge in the public system is exacerbated by dysfunction at the student loan/grant agency, National Student Financial Aid Scheme (NSFAS),¹ and the tendency of the system to admit students before ensuring they can pay their fees. Students who have been left hanging by NSFAS,² in turn, end up owing money to universities³ – the sum is big enough that if the debt were cancelled, it might bankrupt several institutions.⁴

The chaos in the public system is part of the reason for the success of private universities, which in October were finally granted the right to use the term “university” in their names.⁵ This year, new campuses were built in Pretoria⁶ and Cape Town⁷. Some institutions seem to be making a play directly for the white Afrikaans market;⁸ the growth of privates may, in fact, account for the decline of white students in the public sector.⁹

Maybe the biggest story in South African higher education this year was the saga of Nobule Nkabane. An African National Congress (ANC) stalwart who was named Minister after the 2024 elections, Nkabane

quickly ran into trouble with the ANC’s coalition partner the Democratic Alliance (DA) when the latter accused her of lying to Parliament about appointments of ANC-connected individuals to various training boards.¹⁰ She was then fired by President Ramaphosa as part of a bid to keep the DA onside for a crucial budget vote¹¹ and replaced by Buti Manâmelâ,¹² who promptly promised to stabilize the NSFAS within three months (the jury is still out).¹³

A final story of note in 2025 was the way in which South Africa’s endemic xenophobia phenomenon broke into higher education when a member of the Patriotic Alliance party began accusing universities of prioritizing foreign nationals over South Africans in hiring.¹⁴ A typical “it takes more energy to defeat nonsense than it does to generate it” moment then ensued, with institutions having to prove a negative with respect to their hiring practices.¹⁵

Figure 37. Total Enrolments by Sector, in Thousands, 2006-2023

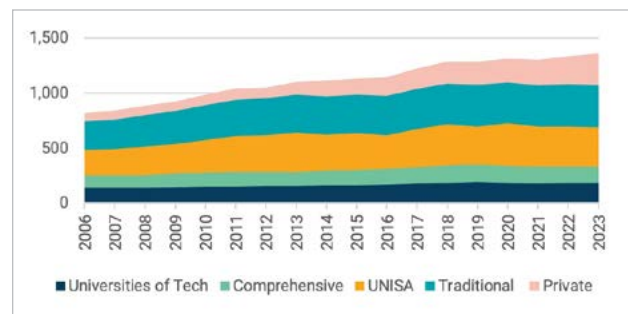
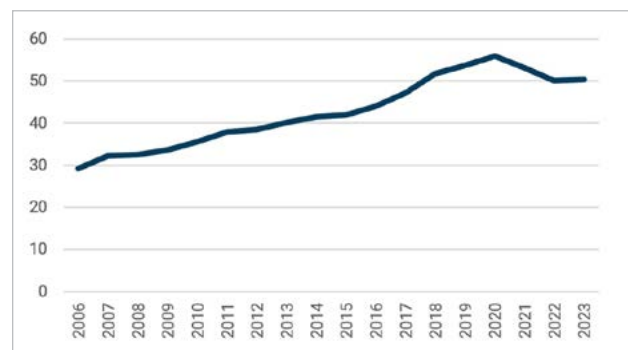


Figure 38: Public Expenditure on Higher Education, in Billions (R2024), South Africa, 2006-2023





Enrolments at Spain's public universities have been falling gently since 2011 (see figure 39). However, at the same time, total enrolments have been rising, thanks to the growth of private higher education. Twenty years ago, private universities educated 10% of Spanish students; by 2024, that figure had risen to 26%. Twenty-seven private universities have been created since the last public one was founded in 1998; most of the growth has taken place in Madrid, Catalunya, and Andalucia.¹

This growth of private universities drove one of the most important policy issues in Spanish higher education this year. Back in March, the national government announced it would bring forward legislation to prevent the use of the term "university" by private institutions without a minimum breadth of programming, a minimum investment in research, and enrolment of at least 4500 students.² This was accompanied by a lot of talk about degrees from private institutions being "low quality"³, so it was quite embarrassing when the Prime Minister's daughter was discovered in October to be enrolled in one such institution.⁴ The measure, which was passed by Congress in the early fall, does not affect existing institutions but will apply to all new ones.⁵

One explanation for the growth of private education in Spain is the ongoing financial "squeeze" on public universities.⁶ As figure 40 shows, however, this is not especially persuasive. It is certainly true that in the wake of the 2008 financial crisis financial support for higher education institutions decreased by about 21%. Since that time, however, funds have increased slowly but steadily: combined with a drop in the number of students at public universities, it means per-student funding has actually been increasing in the public sector by about 1.5% per year, after inflation, across the country. Yet story after story describes Spanish universities as being "on the brink of collapse".⁷

While this story is contestable at the national level, it does seem to hold true in Madrid where the Partido Popular regional government has been starving universities for some time. Complutense University of Madrid, one of the country's oldest and most prestigious universities, is close to insolvency, as are other institu-

tions in the region.⁸ The government's solution is not to increase the size of institutional grants, but rather to loan institutions money on a short-term basis and then clawing back the loan from future grants.⁹

What tends to be overlooked in the debate between public and private universities in Spain is the fact that public universities have been complacent in the face of private universities' entrepreneurialism. The latter have been extraordinarily creative in responding to the demand for professional master's degrees and now deliver over half of all second-cycle degrees in the country¹⁰; they have also taken a disproportionate share of the country's international students¹¹, whose numbers continue to reach new records each year.¹²

Figure 39: Total Enrolments by Sector, in Thousands, Spain, 2005-06 to 2023-24

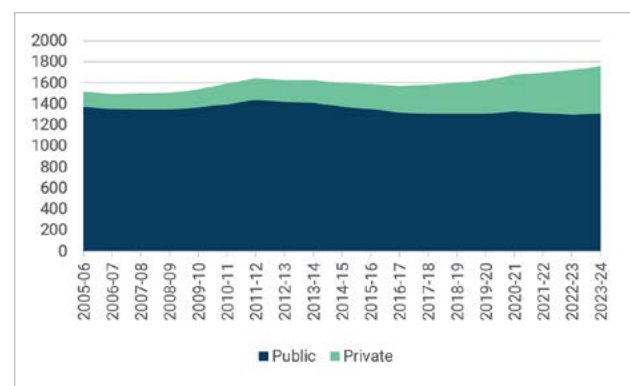


Figure 40: Total Public Spending on Universities, in Billions (€2024), Spain, 2006-2023





The Turkish higher education system was one of the fastest growing in the world from about 2008 to 2022. Over that period, enrolments expanded from about 2.5 million to 8 million (see figure 41), with the vocational sector growing somewhat more quickly than the university sector. Then came 2023, and a general economic crisis triggered by a profligate central bank and a huge spike in inflation. Suddenly, enrolments fell – disproportionately so in the vocational sector. They have not recovered since and indeed have fallen further due especially to a decline in enrolments in the private sector.¹ To compensate for the decline in domestic students, the country has pivoted sharply to international students, with numbers rising to a record 336,000 in the 2024-25 year.²

But while institutions have been losing students, the system as a whole has been gaining public funding – and in some style. Since 2020, transfers to universities have more than doubled, even after inflation (see figure 42). This may be a slight exaggeration (accurate indexation to inflation in a hyper-inflationary environment can be difficult because of the speed at which the value of inputs changes), but there can be no question that the government sees higher education as an important element in the country's modernization. In a similar vein, the national rate of research and development expenditures, which used to be among the weakest in the OECD, is now above the European Union average.³

Two major structural changes dominated the headlines in Turkey this year. The more consequential of the two was the adoption by the Council of Higher Education (known by its Turkish initials YÖK) of the Road Map of Turkish Higher Education Toward 2030.⁴ It is an interesting document because while it is certainly motivated by system improvement and having Turkish universities among the world's best, it largely avoids the usual lines about “world-class universities” and focuses on things like “Quality-Focused Process Management and Leadership” and “Digital Transformation and Data-Based Management”. The second was a decision toward the end of the year to at least partially abandon the 240-credit (i.e. 4 years) standard for bachelor's degrees adopted

as part of the Bologna process. The government wants to make it possible for “elite”⁵ students to be able to graduate in three years instead.⁶

Student protests are a major feature of Turkish higher education, and this year was no exception. The main disturbances were in March, when a set of student grievances⁷ ended up fusing with a protest movement that erupted after the arrest of Ekrem İmamoğlu⁸ – Istanbul's mayor and likely opposition challenger to President Erdoğan. İmamoğlu was also stripped by Istanbul University first of his doctoral degree,⁹ then later his master's and bachelor's degrees, before being sentenced to 2,430 years of prison.¹⁰

Figure 41: Total Enrolments by Sector, in Thousands, Türkiye, 2006-2025

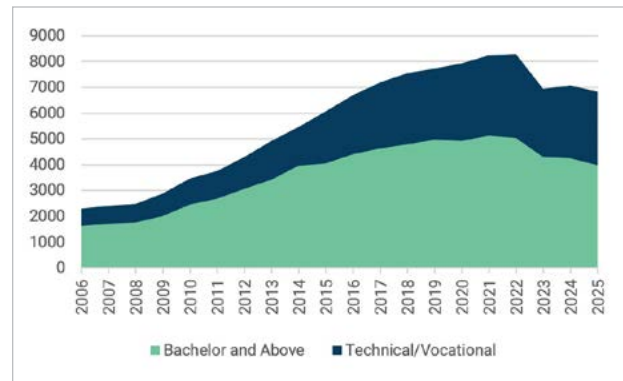
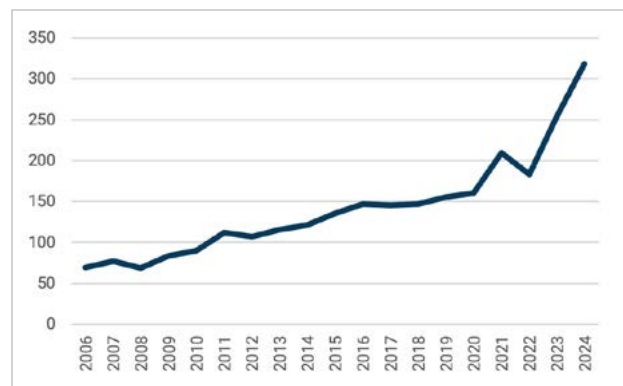


Figure 42: Transfers to Universities, Türkiye, in Billions (₺2024), 2006-2024





Higher education enrolments in the UK have been growing relatively consistently at both the undergraduate and post-graduate levels since the turn of the century with only two periods of exception. The first was a decline in student numbers in 2012 when tuition fees rose to £9000 the second was during the immediate post-COVID period when the system attracted a large number of international post-graduate students (see Figure 43). Apart from those two blips, the system has grown steadily by an average of about 45,000 students per year since 2000.

In terms of direct public expenditures on universities, figure 44 shows how the post-2010 policy regime changed the landscape of higher education financing in the UK. The figure does not include data on tuition fees, which are paid partially by students and partially by government, depending on total lifetime income, which is technically unknowable in advance (though the government does place a notional obligation on its books known as the Resource Accounting and Budget (RAB) Charge).¹ High tuition meant total income for UK institutions soared in the short term; in the long term, though, it made institutions dependent on a tuition fee whose almost-fixed value has deteriorated over time due to inflation.

The reliance on fees also left institutions vulnerable to changes in enrolment, either domestic or (especially) international. When the previous Conservative government's reforms on international students began to bite in late 2024, the system saw a reduction of 17% in the number of new international students.² A wave of warnings about financial crises began.^{3 4} Dozens of universities began implementing staff cuts;⁵ half of all institutions cut courses (i.e. programs)⁶ and the Department of Education indicated that it thought the failure of at least one institution was very likely.⁷ Sometimes, external funding challenges were exacerbated by local examples of questionable management, most notably at Dundee University.⁸ Institutions began looking at ways

to co-operate to cut costs⁹: in one extreme case, the Universities of Kent and Greenwich agreed to a merger¹⁰ (though some described it more as a takeover of the former by the latter).¹¹ One analysis pointed out that the set of cuts being contemplated were less severe than those of the early 1980s and the system would likely survive more or less intact,¹² but few took much comfort in that.

The UK Government was at best a bystander to much of this activity, undesirous of institutions going bust but unwilling to bail anyone out, either. Its big policy centrepiece was the release of the Post-16 Education and Skills White Paper,^{13 14} which quite pointedly did not address the issue of institutional failure at all.¹⁵ The government moved to restore student maintenance grants – eliminated by the previous government – to at least some students¹⁶ but burned almost any goodwill it might have gained on that by funding the initiative through a flat tax on international students which was expected to further worsen university finances.^{17 18} The government also broke with over two decades of labour policy and formally abandoned the 50% university participation target as “not right for our times”, replacing it with a target of two-thirds of young people reaching university or participating in an apprenticeship.¹⁹

In research news, towards the end of the year came rumblings that the major research funding bodies wanted universities to start shifting away from “low-quality research”²⁰ and do fewer things but do them better”.²¹ Work on the 2029 Excellence Framework was paused for three months while the sector argued out the implications of a two-track model that would see research-intensive universities and research light universities assess in somewhat different ways.²² Meanwhile, a Parliamentary committee pointed out the UKRI, the country's big research funding body, lacked a set of measurable objectives and made suggestions about how to develop one.²³





Finally, two institutional-level stores of note. Greater Manchester University (actually in Bolton) was the subject of an embezzlement/bribery investigation by the Manchester Mill²⁴ which resulted in the vice-chancellor and several senior staff being suspended.²⁵ Police executed search warrant at several properties in May,²⁶ but so far no arrests have been made. And at the University of Warwick, there was much derision over the university's public relations activities. As part of a university brand re-positioning, the university paid for a spread in *Vogue* magazine which was widely pilloried as tone-deaf²⁷ (a related effort in *Monocle* largely escaped a panning).²⁸

Figure 43: Total Enrolments by Level, United Kingdom, 2000-01 to 2023-24

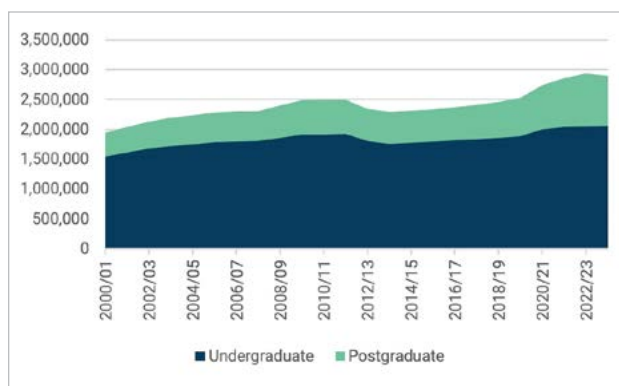
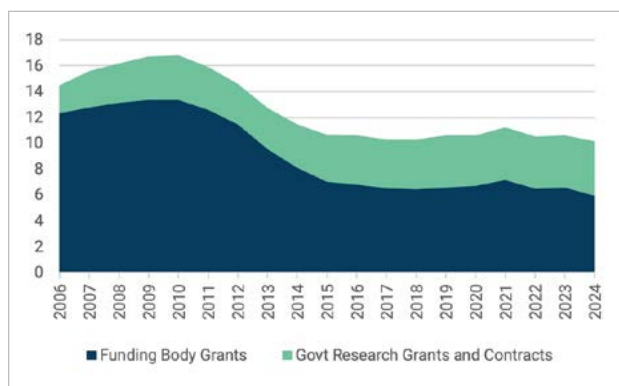


Figure 44: Public Expenditures on Universities Excluding RAB Charge, in Billions (£2024), United Kingdom, 2006 to 2024





In many countries, 2025 was a time for higher education systems to just duck, cover, and hope to outlast the carnage. But this year, three countries stood out for their commitment to radically re-think their systems.



GOLD Uzbekistan

Higher education expansion in Uzbekistan has been on a tear for the past decade. Between rising birth rates, increasing secondary completion rates, and a university system whose growth was deliberately constrained under the rule of former President Karimov, the double-land-locked country faced a huge wave of demand a decade ago. Since then, the country has quintupled its university enrolment.¹ And it has achieved this by consistently unorthodox means.

Just this year, it has continued to expand higher education in both the public² and private³ sectors, while at the same time tightening accreditation rules.⁴ It has partnered with Germany⁵ and France⁶ to open new universities and training organizations. It has created a new national “talent system” focused on producing graduates who can succeed at Ivy League universities⁷ and expanded a program to send its best civil servants to top foreign universities.⁸ Uzbekistan has even reached the point of being recognized as a destination for international students.⁹

In a system this hyperactive, there are bound to be mistakes and overshoots; the need to create jobs programs for university dropouts,¹⁰ for instance, suggests a certain amount of frantic backfilling. Nevertheless, in a world of shrinking educational ambition, Uzbekistan stands out as a country that still thinks higher education is a good investment. Bravo.



Silver Greece

Greek higher education used to be known for a few things: the absolute prohibition on private education, a rowdy student movement emboldened by legal bans on police presence on campus¹¹ (a hangover from the dictatorships of the early 1970s), and the large-scale presence of “eternal students” – individuals who never graduate but remain as students, often for decades,¹² avoiding tuition while benefiting from reduced prices for housing, transportation, and more.

Back in 2021, the government began moving to change these policies, and 2025 was the year much of the implementation came into effect. Four new private universities, all domestic/foreign partnerships, opened in the fall of 2025.¹³ Over a quarter of a million “eternal students” have been removed from the rolls, and another 35,000 have been given one final year to graduate.¹⁴ While police are still barred from campuses, each university has now been given the mandate to adopt “controlled access” plans,¹⁵ with special prosecutors assigned to handle campus crime.¹⁶ It’s also starting to look at modernizing its admissions system with a 2029 implementation date.¹⁷

Put together, these reforms show Greece is heading towards a more professionalized, less anarchic system or, to put it another way – something much more European. Not before time. Bronze



Vietnam

Vietnam, fresh from its big climb up the PISA rankings,¹⁸ is trying its best to replicate its success-despite-limited-means tale at the tertiary level. The big story is its ambitious new strategic plan to develop world-class universities over the next five years,¹⁹ while at the same time trying to expand the system to serve three million students a year²⁰ (though how it would know it hit this goal is unclear as the country has not produced an official count of students since 2020). It has also unveiled a sweeping plan of university consolidation to create bigger, better universities²¹ and – not for the first time – set goals with respect to Vietnamese institutions joining the World Top-500 club by 2030.²²

In some places that might all just sound like big talk. But dig a little deeper and what you see is across-the-board activity to improve the system, including: simplification of admissions systems,²³ reforming university government,²⁴ opening a new network of excellence system,²⁵ and experimenting with the use of English in instruction.²⁶

As a result of all this, there is growing foreign interest in setting up new institutions the Southeast Asian country,²⁷ so much so that the government is setting up new rules for transnational education.²⁸ American institutions are looking for partnerships,²⁹ and private actors are setting up institutions as well.³⁰ All in all, Vietnam is one to keep an eye on.



Notable Books



Capitalizing on College: How Higher Education Went from Mission-Driven to Margin Obsessed by Joshua Travis Brown is a wild ride. It's a set of studies of private religious colleges facing difficult financial services and their differing strategies to ward off financial crisis. There's nothing like a silver bullet, it turns out, and some of the most successful approaches come with some seriously problematic trade-offs.



The Highest Exam: How the Gaokao Shapes China by Ruixue Jia and Hongbin Li. Two academics born and raised in China (but working in the United States) explain the history, benefits and drawbacks of China's 1500-year-old obsession with high-stakes academic exams as a means of defining and identifying talent. Of particular interest is the contrast between the Chinese and American notions of ultra-selectivity, and how Chinese parents in America are starting to influence policy on the other side of the Pacific.



A World of Private Higher Education by Dan Levy. It's hard to cover a sector which exists in almost every country in the world, educates a third of the planet's students, and comes in such a rich variety of forms. But Levy manages it. From Harvard to Islamic Azad University, from "intercultural" universities in Mexico to for-profit religious institutions in Africa, Levy has the system covered in an engaging way.



The Authentic University by Frank Ziegele and Ulrich Müller. This excellent book, available free on the Centre for Higher Education's website, was translated earlier this year. It shows how institutions can respond to a world of rapidly changing public priorities by organizing themselves around "Grand Challenge" logics *without* giving up their core principles and surrendering to consultant-speak. It's a great read. And did we mention it was free?





The World of Higher Education in Data

This section of the *Year in Review* provides a statistical review of 25 of the world's largest educational systems. Together, these countries represent over 80% of all higher education enrolments in the world, so they collectively represent a reasonable picture of global higher education systems as a whole.

Enrolments

To a very substantial degree, global higher education is the story of just three national systems: those of the United States, India, and China. Together, these three countries represent about 45% of global GDP and just under 40% of global population. Within our group of selected countries, they represented a little over half of enrolments in 2006 and nearly 2/3 of total enrolments in 2024. The change in that time was due almost entirely to growth in India and China. Since 2006, enrolments in China have risen from 23 to 59 million, and from 13 to 46 million in India. Over the same period, enrolments in the United States have barely changed. The result is that academia as a whole, once a mainly European phenomenon, then a north Atlantic phenomenon, now has its largest base in Asia.

Figure 46 shows total enrolments across OECD countries. Globally, higher education enrolments grew at a very fast clip, roughly 6% per year, in the period 2006-2011 and then at

Figure 45: Enrolments in China, the United States, and India, in Millions, 2006 v. 2024

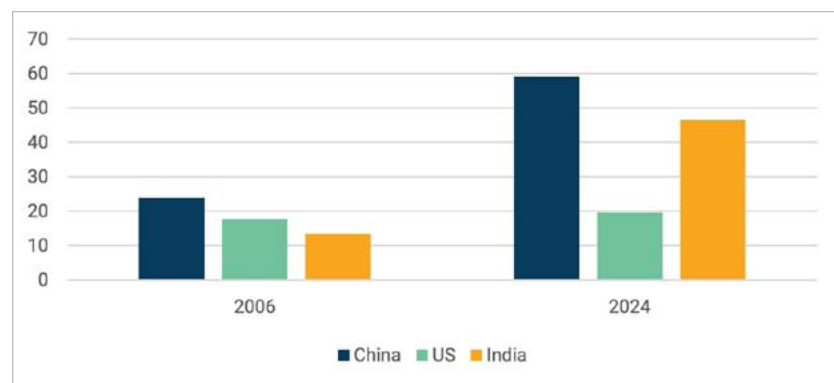
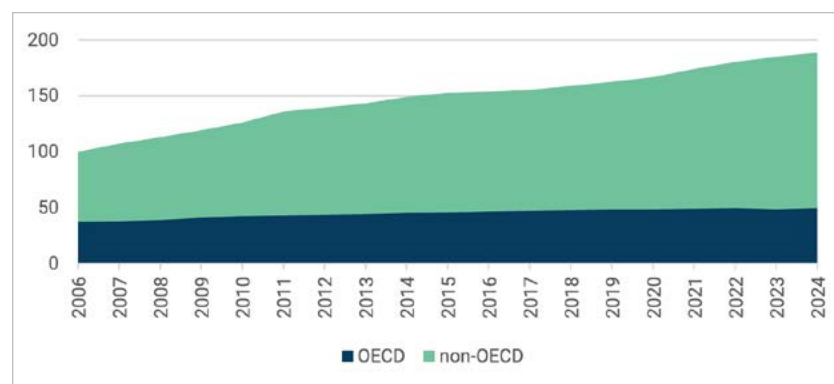


Figure 46: Total Global Enrolment, in Millions, by OECD Membership, 2006-2024



a slower pace of just 3% since then. Growth has predominantly been concentrated in lesser-developed countries: within countries who are members of the Organization for Economic Co-operation and Development (OECD), overall growth in the 2006-2024 period was about 34%, compared to 117% in the countries outside the organization.ⁱ

A decomposition of growth in the OECD countries shows that, in most

places, participation growth was much more anemic than the headline 34% would suggest. First, countries such as the United Kingdom, Canada, and Australia grew mainly because they were importing student from places like India and China, rather than growing domestic enrolments. Even more significantly, just a single country – Türkiye – accounted for three quarters of all growth among the selected OECD countries between 2010 and 2022. In those twelve years,

ⁱ For consistency, Colombia, which joined the OECD only in 2020, is not counted among the OECD countries since it was outside the organization for the majority of the period in consideration.



Türkiye's enrolment grew by about 5 million students, while the rest of the OECD combined grew by about 1.5 million. The situation changed slightly with the large-scale disappearance of students in Türkiye in 2023 (see TURKIYE) but the key point here is the general stagnation evident in most OECD countries.

Broadly speaking, countries in our sample can be divided into four separate groups. In the first group come countries which have either stopped growing or are seeing falling enrolments. Russia and Poland have lost about a third of their student population between 2008 and 2019, mainly due to massive demographic changes in the early 1990s after the end of socialism. Both countries appear to now be on the rise, albeit from a much lower base. South Korea has lost about 20% of its student population since 2011, and continues to lose students every year, which largely explains its current obsession with attracting international students. Japan has had essentially unchanged enrolment over the past two decades. Italy saw falling enrolments in the decade 2006-2016, but then a recovery thereafter, mainly due to growing enrolments in private online universities.

The next group of countries are those where total enrolment growth between 2006 to 2024 was between 10-50%. These are mostly drawn from the ranks of OECD countries. Most of these countries follow a similar pattern of slow and steady growth of between 1-2% per year. There were two exceptions to this

Figure 47: Annual Enrolment Growth Within the OECD, 2006-2024

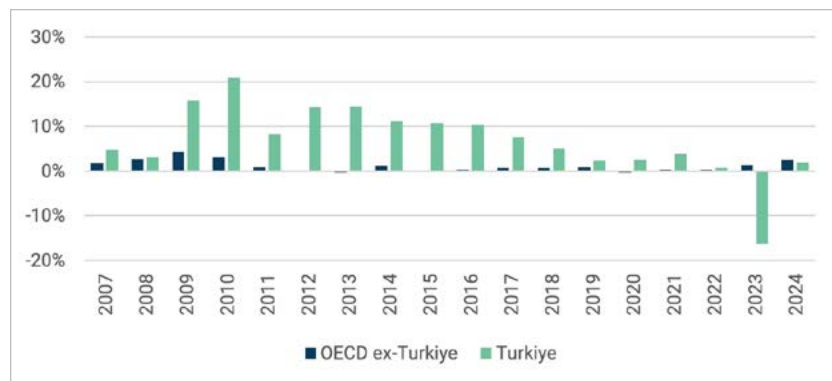
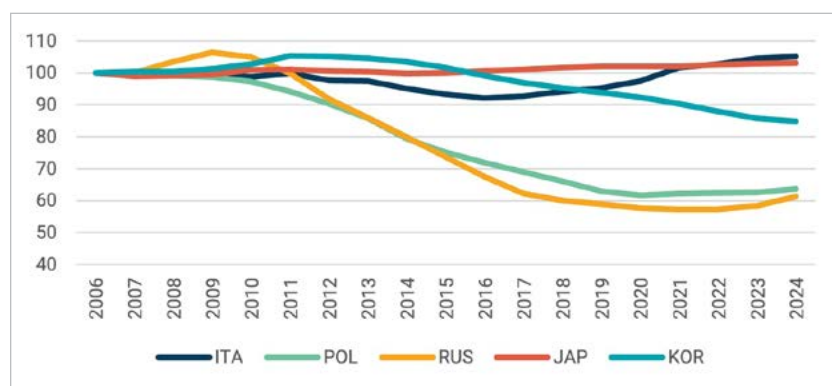


Figure 48: Enrolment Change, Countries with Falling or Plateaued Enrolments, 2006-2024 (2006=100)



pattern. One was Germany, where the Pact for Growth funding program of the early 2010s set the stage for fairly aggressive growth, which grew enrolments by over 40% between 2006 and 2024. The other was Iran, which had one of the fastest growth rates in the world in the early part of our period, with enrolments doubling between 2006 and 2015. However, since 2015 enrolments have plummeted, mainly due to declining youth demographics but also in part due to the country's economic woes. After losing about a quarter of its student body, Iran in 2024 showed roughly

the same cumulative growth rate as Canada and Germany.

The third group of countries are a group of predominantly middle-income countries where enrolments rose by between 50 and 100% between 2006 and 2024. Of these, Colombia showed the strongest growth at an average annual rate of about 4%. Malaysia showed similar growth levels until about 2019, however the arrival of COVID-19 resulted in a significant erosion of student numbers, particularly in the country's private universities. As of



2024, the country had only just regained its pre-COVID heights. In the other three countries – Argentina, South Africa and Australia – the pattern is more one of regular 2-3% annual growth.

The final group of countries are those who have experienced explosive growth – a doubling or more of enrolments within the period under consideration. Within this group of countries, Mexico, Brazil, and China have posted fast but steady growth of 4-5% per year. India has also had fairly steady growth, but at a higher rate of about 7% annually. Türkiye and Pakistan had even faster growth until about 2000-2022, but then saw some dramatic declines in enrolment after the turn of the decade. Unlike Iran, these declines were not predominantly driven by adverse demographics – quite simply, people in these countries decided higher education was no longer worth the investment.

The past twenty years have seen astonishing growth in the world's higher education systems. In the late 00s, growth was roughly 6% per year world-wide. For the last decade, however, growth has been just 2.5%, and many countries appear to have plateaued or in some cases started to shrink. Growth in China has been surprisingly resilient but soon enough demographic realities will force institutions to shrink as well. Only India looks a reasonable bet to see continued growth, but the experience of neighboring Pakistan, as well as

Figure 49: Enrolment Change, Countries with Light Growth in Enrolments, 2006-2024 (2006=100)

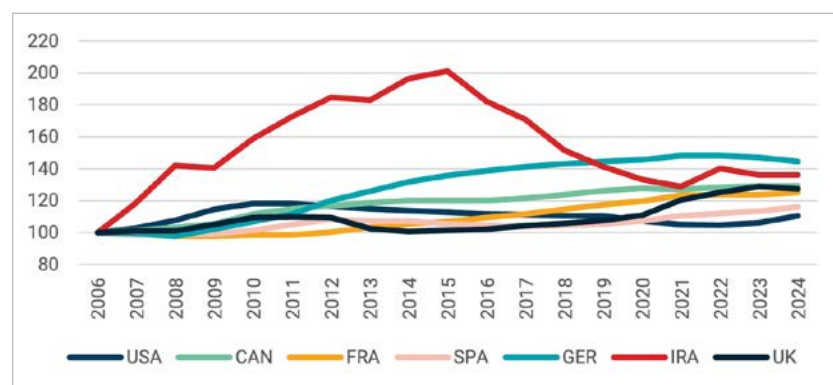


Figure 50: Enrolment Change, Countries with Strong Growth in Enrolments, 2006-2024 (2006=100)

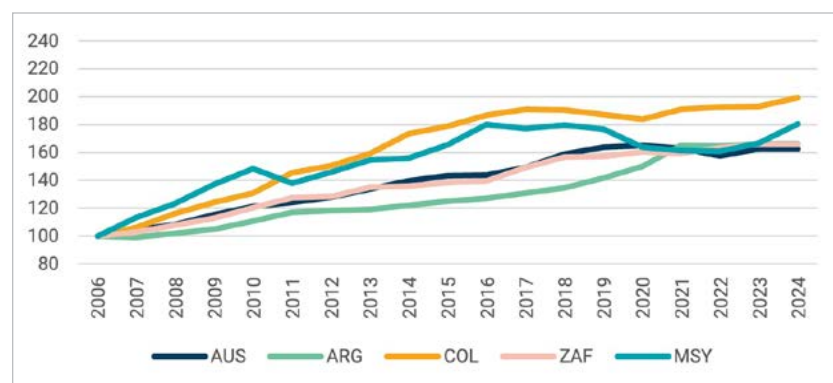
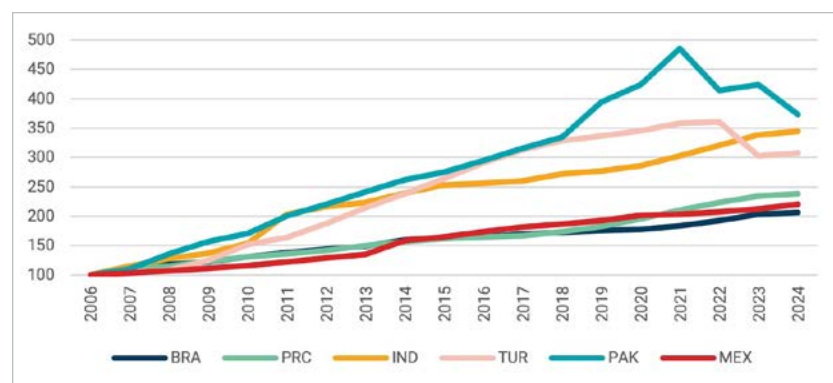


Figure 51: Enrolment Change, Countries with Explosive Growth in Enrolments, 2006-2024 (2006=100)



slightly more distant Türkiye and Iran, is that growth cannot be taken for granted and can be quickly undone.

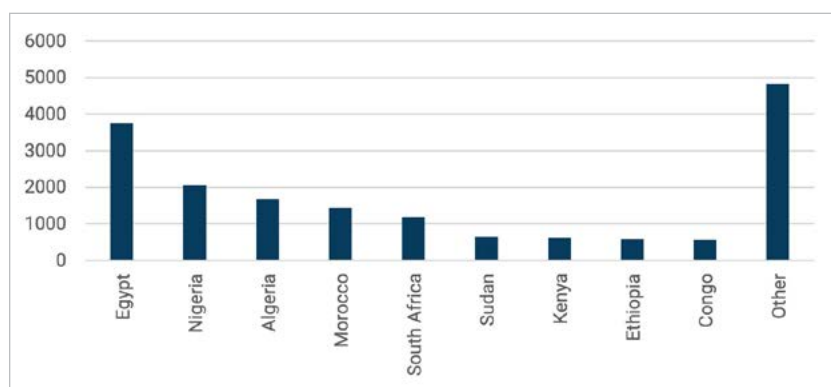
What do we know about African Higher Education Enrolments?

Unfortunately, African countries tend to produce less public data on higher education than countries in other parts of the world. That means that in the fastest-growing part of the world, the data we are working with is very imprecise.

It is not simply a matter of governments not publishing enough on their own: in many parts of the continent it appears as though statistical systems are simply not working. In the 19-year period from 2006 to 2024, only fourteen African countries managed to report the simplest data – enrolments – to the UNESCO Institute of Statistics for fifteen or more of those years. Sixteen countries reported fewer than ten times; Nigeria, which possesses the continent's second-largest system of higher education, reported only twice, the last time in 2012 (more recent data is available from the country's National Universities Council but even there the latest data is from 2018/19).

That said, most of the largest countries do report relatively frequently, so it is possible to provide a reasonable guess about enrolment levels. Using the most recent data available from each country (which likely undercounts current enrolments somewhat), there are roughly 17.5 million students in higher education in

Figure 52: Higher Education Enrolments, in Thousands, Africa, Latest Available Year



Africa – roughly equivalent to the number of students in the United States. However, of that, over 10 million (57.7%) are concentrated in just five countries: Egypt, Nigeria, Morocco, Algeria, and South Africa. Only nine countries have as many as 500,000 students: the aforementioned five plus Sudan, Kenya, Ethiopia, and the Congo (Sudan's last count was taken in 2015, well before the civil war, and it is unlikely that this number remains correct; the number for Nigeria is from the NUC's 2018/19 Statistical Abstract).

Public Funding

Data on public funding is more difficult to obtain than data on enrolment. Sometimes this is because responsibility for higher education is distributed across a number of government ministries; more often, though, governments do not always view transparency as something that applies to them. This section contains financing data on the 21 countries where financial data is available back to 2006.

Comparing public funding across countries can be very difficult. Governments do not record spending in perfectly consistent ways, and the question of how to compare expenditures in different currencies is somewhat fraught. There is an obvious case to be made for using purchasing power parity (PPP) to convert spending figures into a common base, mainly because the majority of university spending in all countries is on salaries, which are naturally based on local market conditions. On the other hand, universities also have considerable expenses (such as laboratory equipment and scientific publications) which need to be paid for in hard currency, and there is the fact that the academic labour market – at the very top end at least – is global in nature. These are both reasons to use market exchange rates.

If PPP and market exchange rates were roughly aligned, then it would not matter which method one chooses. In Brazil, for instance, the exchange rate is roughly 5.3 reals to the US dollar, but the PPP conversion



factor is just 2.56. Using one conversion implies public expenditures of about \$12 billion USD, the other suggests about \$25 billion USD. In China, the difference is also about 2:1, while in Russia it is closer to 3:1, and in India and Indonesia about 4:1. This would make any comparison more about methodological choices than about underlying reality.

To side-step this issue, this section focuses less on absolute levels of higher education expenditure, than on *change* in real (that is, inflation-adjusted) higher education spending. This is also not without its challenges, in particular with respect to countries that have experienced or are experiencing very high levels of inflation, such as Argentina and Türkiye (budgets and expenditures happen once a year, but prices change constantly, making it hard to anchor the point in the year at which an index price should be applied). On the whole, though, this presents fewer problems than the alternatives.

At any given time, public funding for higher education is going up in some countries and down in others, driven by ideology, demographics, and economic cycles – but, in many cases, simply based on how much tax money governments have available to them and the level of competing priorities for than money. Even within a single country, this can vary significantly from year to year. This means that determining which countries are spending “more” or “less” very much depends on the time-horizon one is speaking about.

Figure 53: Percentage Change in Real Public Funding by Country, 2018 to 2023

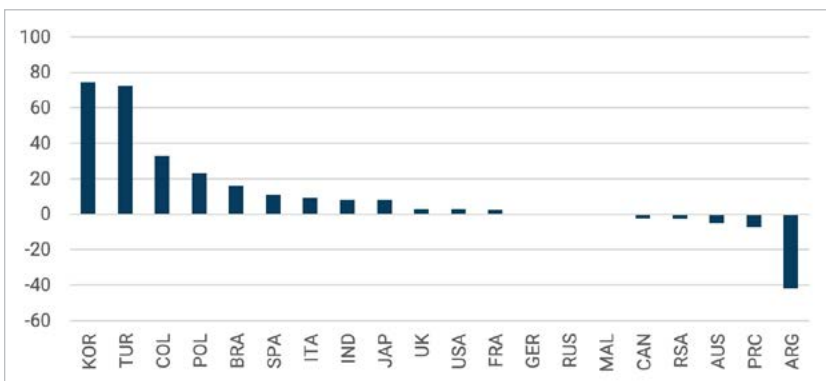


Figure 54: Real Percentage Change in Real Public Funding by Country, 2013 to 2023

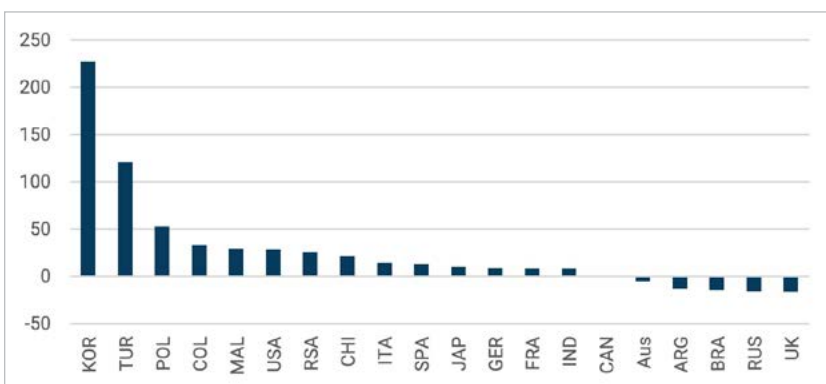


Figure 53 shows real change in public funding over the most recent five years for which data is available, namely 2018 to 2023. This was a tumultuous period for public funding as it included the COVID-19 pandemic, which had heterogenous effects across global higher education: some countries saw large temporary increases in funding while others saw significant funding decreases. Public funding decreased very significantly in Argentina over this period. This was due to the very significant increase in inflation in this period (the period covered by

the graph ends prior to the coming to power of current President Javier Milei). Most of the OECD countries showed either no growth or a small decline a small decline in funding; so too did China, where funding fell during the pandemic and has yet to quite regain its earlier levels. The biggest expansions of higher education spending have come in South Korea and Türkiye, which, recall from figures 48 and 51, are two countries which have seen significant reductions in student enrolments in recent years as well.



If we take a slightly longer lens and look at changes in the decade to 2023 (see figure 54), South Korea and Türkiye have seen by far the largest increases in spending. But at the bottom end of the scale, we see a very different set of countries. The United Kingdom and Russia have both seen public funding declines of 16%, and Australia, Argentina, and Canada have also seen declines or stagnation in their funding levels. Brazil has also seen a decline in public spending despite have seen a massive growth in the number of students enrolled, a testament both to the expansion of private higher education and of cost-reducing online education which have both been major parts of the Brazilian experience in recent years. Perhaps the most interesting contrast is between Russia and Poland. Both saw dramatic decreases in student enrolments due to adverse demographics in this period, but Russia cut funding to institutions while Poland increased it significantly.

Finally, if we take an even longer lens of 15 years (see figure 55), the picture changes once again. The United Kingdom remains the largest net decliner, with a reduction in real public spending of 34%; of course, this was offset by much larger increases in fee income from both domestic and international students. Spain, Italy, and Russia also saw small declines in public spending. South Korea and Türkiye remain in the top 3 for public spending, but they are now joined by China, which has seen growth of about 250%. What this tells us is that the years of biggest growth in China were pre-2013 – i.e.

Figure 55: Real Percentage Change in Real Public Funding by Country, 2008 to 2023

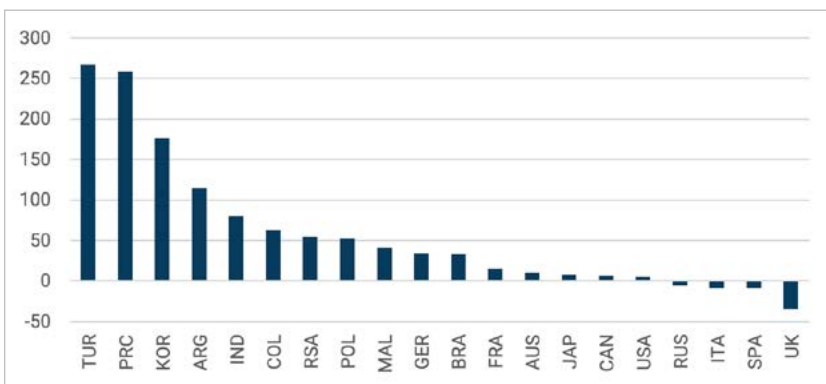
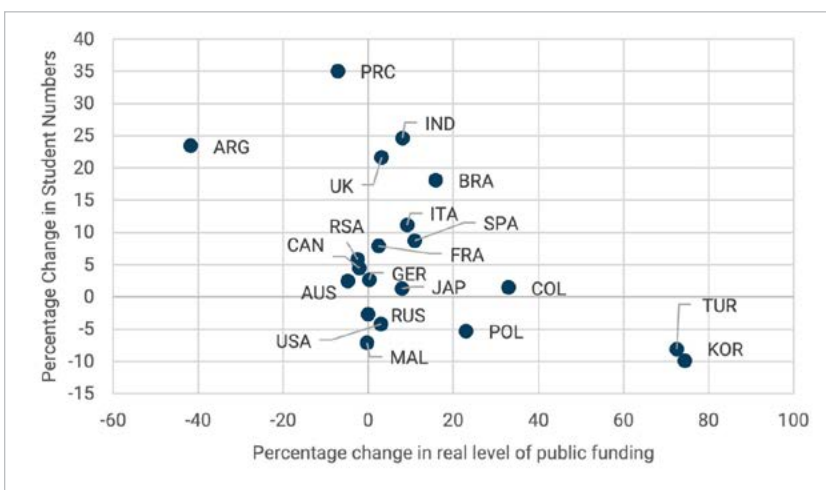


Figure 56: Enrolment Change vs. Real Change in Public Funding, 2018-2023

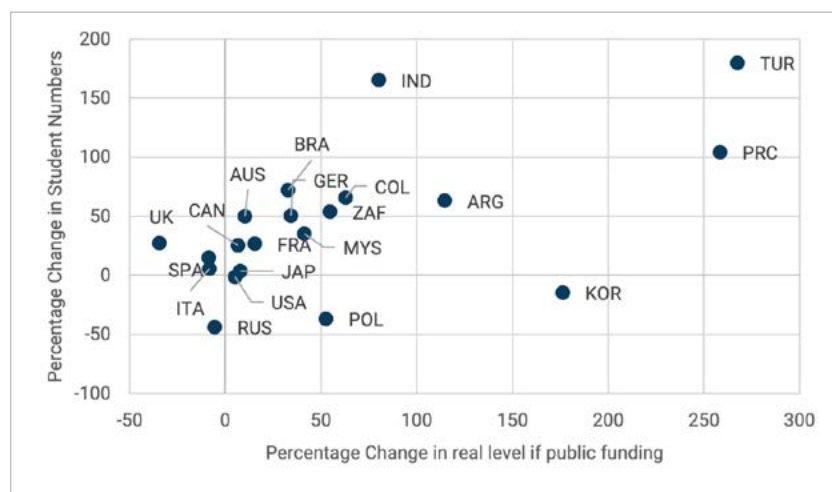


before the accession of Xi Jinping. Since Xi has come to power, investment in higher education has been more anemic (and indeed has been negative since 2018), which again is quite amazing since the system has added 22 million students since he was first elected at the 18th Party Congress in 2012.

In order to get a slightly better overall picture, we can combine the

data on funding and enrolment, as we do below in figures 56 and 57. Countries in the upper left quadrant of these graphs have the worst of both worlds – increasing student numbers and decreasing funding. Those in the top right have both increasing funding and increasing student numbers, and in the bottom right are countries with increasing funding but decreasing student numbers (the bottom left quadrant,

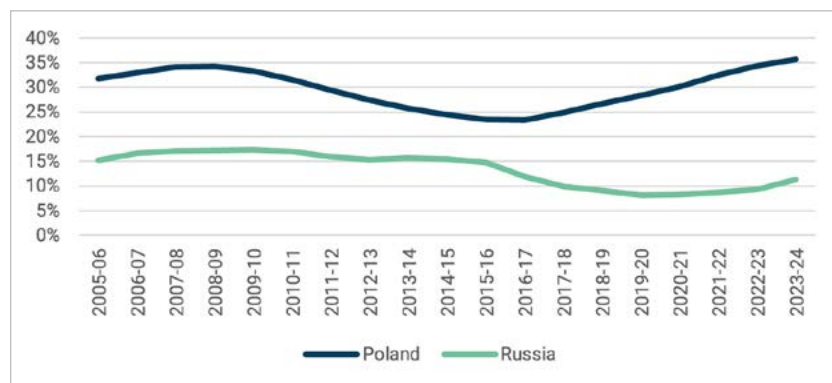


Figure 57: Enrolment Change vs. Real Change in Public Funding, 2008-2023

with both declining enrolment and funding, is really only inhabited by Russia). Figure 56, which looks at the enrolment/funding relationship over the past five years, shows most countries in the top right quadrant, which is in effect the default for most countries in most periods. South Korea, Türkiye, and Poland are all in the bottom right quadrant, implying very large increases in per-student spending. Argentina, and to a smaller extent China, are dealing with the worst of both worlds – strongly increasing student numbers and declining real public funding.

Over a longer-fifteen-year horizon, the picture changes a bit (see figure 57). Türkiye and China are now the clear outliers, with massive increases in public investment outpacing actual student number growth. Russia has seen decreased public funding, but the decline has not been as significant as the decline in enrolments. India, Brazil, and Australia all find themselves in a category where public funding has increased, but nowhere near as fast as enrolments. Spain, Italy, and especially the United Kingdom, have seen themselves with increasing enrolment but falling public investment.

The relationship between funding and access is by no means a simple one. Generally speaking, larger systems should command more resources than smaller ones. However, over any given stretch of time, it seems some countries choose to

Figure 58: Private Higher Education Share of Total Enrolments, Poland and Russia, 2006 to 2024

expand access without adding new funds, while others choose to add funds even when student numbers are falling. There are no generalized patterns, just a series of individual country experiences. This simply underlines the fact that when attempting to tease out global trends, there is no substitute for a deep understanding of the many individual national experiences.

Private Higher Education in Europe

Immediately following the collapse of socialism in Eastern Europe, a wave of new private higher education institutions appeared. This phenomenon existed primarily in Russia, Poland, and Romania, but it affected education in every country. Mainly, these institutions prospered in two areas: the social sciences,

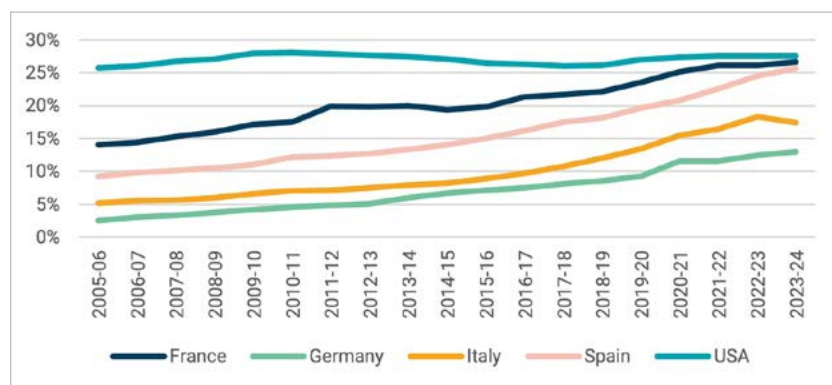


where decades of embracing Marxism left older universities without credibility, and in commerce, which was essentially a new field where older and more prestigious universities had no reputation to fall back on. Private institutions were considered “demand absorbing” – that is, as enrolments rose rapidly in the 1990s, it was easy for private institutions to absorb many of these new students, meaning that public institutions – which do not charge tuition – could grow more slowly and sustainably.

However, in Poland and Russia, enrolment growth went into reverse early in late 2000s due to a decline in the youth demographic. In both countries, the fall in enrolments hit the private sector harder than the public sector – not only did the private sector lose students, it lost in terms of overall student share as well. But, as shown in figure 58, something very interesting happened around 2016: while the private sector continued to shrink in Russia, it actually revived in Poland to the point that private institutions have surpassed their former highwater mark of 35% of all enrolments. Given that this is being done at a time when public universities in the country are receiving very significant levels of new investment, the achievement is doubly surprising.

Meanwhile, in Western Europe, private education is achieving something quite extraordinary. In the popular consciousness, continental European systems of higher education are thought of to some degree as the antithesis of the American

Figure 59: Private Higher Education Share of Total Enrolments, Selected European Countries and United States of America, 2006 to 2024



one, particularly when it comes to public higher education vs. private higher education. But, in recent years, developments in Europe are putting that stereotype to the test.

As shown below in figure 59, the share of enrolments in higher education is rising in most of continental Western Europe. The phenomenon is most prevalent in France, but there has been even stronger growth recently in Spain. Both countries may, in fact, surpass the United States in terms of the share of private higher education sector enrolments in the very near future (the price of private higher education in Europe remains significantly cheaper than in America). The growth of the private sector in these two countries has recently become sufficiently worrisome to authorities that new controls are being put into place to curtail their rise (see PRIVATE UNIVERSITIES). But this phenomenon is not restricted to these countries: both Italy and Germany have seen similar rises.

What is driving these changes?

Mainly, four things. First, some domestic undergraduate students are being enticed out of the underfunded public system simply because they can be more sure of smaller class sizes and the ability to enrol in more specialized niche programs at private institutions. Second, private institutions have been much more adept at adjusting to increasing market demand for professional master's degrees; indeed, in Spain, public universities seem to have more or less ceded this category of programs to the private sector. Third, and relatedly, these private institutions are to a significant degree aimed at an international (i.e. non-EU) student audience, which enables them to charge higher fees, which in turn can be re-invested in growth. Finally, the reliance of some of these institutions – particularly in Italy – on online programming gives them an advantage with adult learners over traditional educational institutions, who prefer to stick to a Monday-Friday 9-5 schedule.



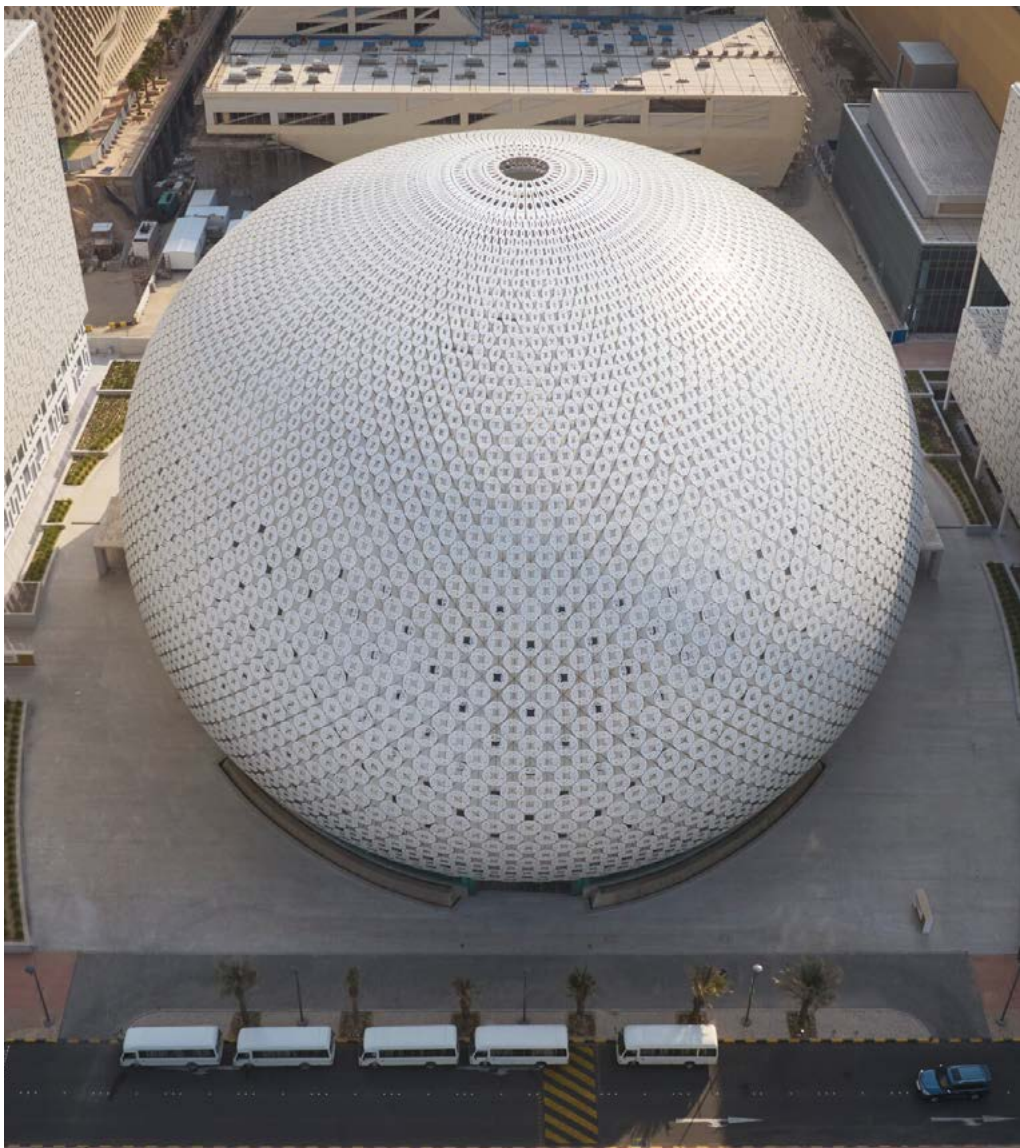
The Year's Best Architecture

Campus architecture is massively important. It determines the way in which academic spaces encourage interactivity among students and staff (or don't) plays a key role in developing a healthy campus culture. Over the past thirty years some of the most spectacular new buildings in the world have been associated with higher education, like the Mode Gakkuin Cocoon Tower in Tokyo, the Stata Center in Boston or the Rosalie Sharp Centre in Toronto. Here, from among the many examples of campus buildings which have won a significant prize in architecture over the last 12 months, are our five favourites for 2025.



The Pearl (Convocation Hall), Kuwait University¹

The Pearl, a 1,500 seat theatre for events and celebrations, lies at the centre of a 6-building educational/administrative complex that architects Skidmore Owings & Merrill (SOM) designed for Kuwait University in Sabah al-Salem University City. Made up of thousands of sun-shading panels (some of which shade out the Arabic word for pearl – *aidanah* – in a late Ottoman cursive style) and culminating in a massive skylight aperture, this building blends the country's pearling past with its desired knowledge-economy future. Better known for its work in the United States, with this project SOM emphatically demonstrated an ability to work in a very different cultural context.



Global Innovation Centre, University of Hong Kong²

The Global Innovation Centre, still in the design stage, is meant to house a world-class, transdisciplinary academic and scientific research facility comprising space for research, teaching, learning and conferences, open space and offices at a site built into the far side of Victoria Peak from the main campus. Deeply blended into the local topography, California architects moore rubell yudell might have to make some modifications to satisfy local opposition but we're sure this building is going to be fantastic.



Schwartz Reisman Innovation Campus, University of Toronto³

Designed by New York Architects Weiss/Manfredi, the Schwartz Reisman building is part of the University of Toronto's Discovery district, which houses the University's entrepreneurship program, Innovation and Partnership Office and most famously the Vector Institute for Artificial Intelligence. The tapered tower, the atrium, the winter gardens, and mixed use spaces all contribute to fostering exchange, a la Bell Labs. Another fabulous addition to downtown Toronto's growing number of world-class higher education buildings.



Centre Inclusiveness Growth & Competitiveness, T A Pai Management Institute (TAPMI)⁴

The architectural firm The Purple Ink Studio, from Bengaluru has put together a fascinating concept for TAPMI, which is part of the Manipal Academy family of institutions. A multi-purpose set of spaces (amphitheatre, classrooms, workshops, cafeteria) in a building without a main entry, shaded by bamboo parasols evocative of a forest canopy, this building is the heart of the TAPMI Campus. Porous, open to the elements, active and democratic, this space is the absolute antitheses of campus gothic, but TAPMI is going to be all the better for it.



BRAC University Campus⁵

Singapore-based WOHA architects, whose work is world-famous for its sustainable design and attention to climate change, were given the challenge of designing a campus space for 20,000 students (seriously, this thing is massive) in Dhaka, Bangladesh. Their solution – to put most of the academic staff and classrooms far up in the air (the project for some time went by the moniker "The Floating Campus") a campus park below, with plenty of breezeways, facades covered in greenery and a solar panel roof – is innovative both educationally and environmentally.





Strategic Planning in 2025

Strategic planning doesn't always have the best reputation in higher education. To many, strategic plans are merely "theatre" – and kabuki theatre at that. But, without denying that there is a substantial element of public relations in university strategic plans or that the contents of strategic plans are sometimes more wish than reality, the fact is that reading strategic plans is a pretty good way of understanding how institutions wish to be perceived, and that changes in the content of strategic plans broadly speaking can be taken to represent changes in the ambitions. And, because academia is so isomorphic, analyzing strategic plans among the world's very top universities is a pretty good way to understand the directions in which higher education as a whole may be heading over the next few years.

That, at least, is the conceit of this section, which analyzes the strategic plans of the top 200 institutions in the world and, in particular, those institutions that published a new strategic plan in the first ten months of 2025, and whose new plans can be compared with previous plans in order to examine change over time.

Plans at the Top 200: Duration

The sample for this study consists of the top 200 institutions in the world as designated by the Academic Rankings of World Universities (Shanghai Rankings) in 2024, minus the MD Anderson Cancer Centre in Houston and the Mayo Clinic College in Minnesota, neither of which are really universities in a meaningful sense of the term. Unfortunately, it also excludes the 34 of the 35 Chinese universities who have achieved this status. Chinese universities do have strategic plans – in fact, they are all set over five-year periods in order to connect with the country's overall five-year plan, meaning most if not all institutions should have new plans next year when China's Fifteenth Five-Year Plan is unveiled. However, these strategic plans are not easily discoverable via their websites even with translation software (the exception is the Beijing Institute of Technology). We hope to be able to include them in next year's edition. That leaves 164 institutions.

Of these 164 institutions, fifteen have no university-wide strategic plan. These are primarily American private institutions – like Harvard University, Cornell University, the University of Pennsylvania – plus non-US institutions McGill University and the University of Cambridge. The University of California, Santa Barbara is the only US public institution in the top 200 without a strategic plan. For the most part, these institutions sit towards the top end of the rankings; five of the twelve no-plan institutions are in the ARWU's top ten institutions worldwide. There are two obvious explanations for this. The first is that the very top institutions have no institution-wide plans because they are, in fact, confederations of very powerful faculties that find institutional plans get in the way of their own ambitions. This definitely seems to be the case at Harvard University, Yale University, and Columbia University, all of which have constituent colleges that embrace strategic planning. The second is that strategic plans are tools to help organize institutions change their position or status and quite simply, for institutions at the very top of the prestige pole, there is little motive to



change and therefore little incentive to create a strategic plan.

Of the remaining 149 institutions, 28 have plans of indefinite scope; that is, they were drawn up at some point in the past, have no obvious predecessor document, and have no end-date. These plans tend to contain a lot of motherhood phrases about teaching and research that work in any place and any time, or indeed at any institution. As with no-plan institutions, these types of plans are more likely to be seen at institutions towards the top of the rankings. They are also a feature of the few Japanese institutions that make the top 200. In a few cases, institutions have indefinite plans (sometimes referred to as “planning frameworks”), but issue “refreshes” every so often, as circumstances dictate. At the most prestigious institutions – ones which do not feel the need to use strategic plans as PR exercises – these can simply be pages covered in dense 11-point Times New Roman font with no photographs or charts (Princeton’s plan is perhaps the best example).¹

Strategic planning in both Japan and Germany has been substantially altered by the arrival of their respective countries’ “excellence programs”, which are forcing institutions to lay out institutional priorities in a new way. As a result, a number of institutions in these countries have plans for research excellence because one is effectively required in order to apply for these excellence competitions, but nothing comparable that includes all university activities.

That leaves 121 institutions with limited-duration strategic plans. Forty-three of them are of ten-years’ duration or longer. Again, the likelihood of an institution having a long *durée* plan is inversely related to its globally ranking: top institutions seem more likely to think long-term. The remainder have plans of between four- and eight-years’ length. The very shortest plans tend to either be from Australia, where short strategic plans are legally mandated, and in continental Europe,

where strategic plans are effectively manifestos for management teams at universities where rectors are elected rather than appointed.

Who Produced New Plans This Year?

There were 21 institutions from the Academic Rankings of World Universities Top 200 that published new strategic plans in 2025.ⁱ Of these, seven were from the United States, nine from the European Union (including four from the Netherlands), and six from elsewhere in the world (two from Australia, and one each from Israel, Hong Kong, and the United Kingdom).

Table 1: Institutions in the ARWU Top 200 That Published New Strategic Plans in 2025

America	UC San Diego ¹ , Utah ² , Michigan State ³ , Illinois ⁴ , Carnegie Mellon ⁵ , Arizona ⁶ , Penn State ⁷
European Union	Aarhus ⁸ , Paris Sorbonne ⁹ , Milan ¹⁰ , Utrecht ¹¹ , Erasmus Rotterdam ¹² , Wageningen ¹³ , Barcelona ¹⁴ , ETH Zurich ¹⁵ , EPFL Lausanne ¹⁶
Elsewhere (incl UK)	Hebrew University ¹⁷ , New South Wales ¹⁸ , Western Australia ¹⁹ , Hong Kong Polytechnic ²⁰ , Manchester ²¹

Analyzing New Plans: Structure and Typology

Strategic plans can be divided into three types on the basis of their structure.

Single-Level Basic. These are the simplest strategies, where the activities are grouped under three or perhaps four themes (though perhaps “buckets” is a better term).²

ⁱ As of November 1. Several institutions, including the University of Minnesota and the University of Queensland were due to publish after this publication’s deadline; these plans will be included in next year’s report.



The first two are usually “Education” and “Research”, while the third is some variation on what Europeans call the “third mission”. This may be in the form of “community engagement” (typical among American land-grant universities), “innovation”, “entrepreneurship” or even “impact”.

Elements of the second and third buckets can be somewhat interchangeable – for instance, innovation and entrepreneurship are sometimes crammed in with research as a second priority, with community relationships or social responsibility then taking up the third bucket. There is also often a fourth theme, which broadly speaking contains “enablers” of the other three, such as investing in people, technology, and infrastructure. While this kind of plan is very common among non-elite universities, it is relatively rare among top 200 institutions. That said, among plans released this year, the University of Arizona, Carnegie Mellon University, and Erasmus University Rotterdam are all examples of this kind of plan at the “world-class” university level.

Generally speaking, these kinds of strategic plans are the easiest both to draft and to read. Teaching/Research/Third Mission is the most common way universities describe their activities, and also the way most faculty understand universities’ missions. If a strategy is not intended to alter very much but rather to act as a checklist of activities over the period of the plan, then there is a good case for clustering the tasks into three buckets and calling it a strategy. It is less advisable if the purpose of the plan is meant to be transformative.

Single-Level Thematic. These are slightly more complicated than the “basic” plans, both in the sense that the themes are usually more abstract than just teaching/research/third mission, and in the sense that they usually contain more than four themes. But, within this grouping, plans can vary both in the number of themes and the degree to which they depart from the simple teaching/research/third mission headings.

For instance, there is Hong Kong Polytechnic, which has the usual four buckets plus one for internationalization, or Hebrew University of Jerusalem, which has Research,

Teaching, Internationalization, “Diversity, Gender and Inclusion”, and “Community”. Université Paris Sorbonne’s Strategic Plan (technically a “feuille de route” or roadmap), is a 100+ page prose brick, which commits the institution to moving forward on ten big files simultaneously (e.g. interdisciplinarity, student life, doctoral training, etc.).

At the more complicated end of the spectrum, universities group at least some of their themes under more abstract, less prosaic titles. The University of Manchester based its plan in five themes: i) “Flexible, personalised and digitally enabled learning”, ii) “Research excellence to impact”, iii) “A powerhouse of innovation”, iv) “The university to partner with” (i.e. collaboration), and v) “Digital inside and out”. At Aarhus University, the six themes are i) “Research of the highest international caliber”, ii) “Popular degree programs with high academic standards”, iii) “Coherent, vibrant campuses”, iv) “Research-based innovation and entrepreneurship”, v) “Digital frontrunner”, and vi) “Spearheading sustainable development.”

One of the more interesting university plans this year is that of Wageningen University in the Netherlands, which simply describes itself as having three sets of “ambitions” — one set of which are “Global” (under which teaching and research are subsumed), another “Organizational”, and a third “Individual”. The last two are what in other situations might be called “enablers” in the sense that they involve institutional investments in people and structures.

As can be seen from the above, thematic plans can be structured in a wide variety of ways. What they mostly have in common, though, is that the themes describe institutional ambitions or, occasionally, values/identity, rather than being functional “buckets” of teaching/research/etc. The specific actions being proposed might not appear to differ all that much from those with basic strategic plans, but by being grouped thematically ambition they are, in theory at least, being managed with a sense of purpose in the direction of the desired change.

Multi-Level Thematic. A number of institutions have much more complicated strategies, which involve



interactions between multiple sets of themes. For instance, the University of Utah has six “values” (which in truth are more objectives than values) and three “pillars”, the University of Milan has seven objectives and four strategies, and EPFL Lausanne has three “objectives” and nine “transversal areas”. Meanwhile, the University of New South Wales has four “strategic principles” but also nine “strategic pillars”, five of which are “impact pathways” and four of which are “impact focus areas”, while the University of California San Diego’s plan has seven goals and fourteen strategies.

All the multi-level plans are in theory trying to make some kind of distinction between an institution’s ambitions or what it wishes to achieve, and the activities it is pursuing to further those objectives. But in very few cases do the plan’s authors clarify the relationship between objectives and strategies. Indeed, the feeling one is often left with when reading multi-level plans is that the planners are using the extra layer of themes to make sure that no internal agenda is left unaddressed and/or no internal constituency feels unheard. Having a second level of themes can produce the impression that an institution simply wishes to be all things to all people. In that sense, such plans feel like the opposite of strategy. As the saying goes, if everything is a priority then nothing is. Michigan State University’s plan is a rare counterexample, where a simple graphic makes the overlap between themes and priorities a bit more comprehensible.

Finally, in some cases, institutions with thematic plans (either single-level or multi-level) also include a list of research themes where the university will have the most impact. These are not, for the most part, references to specific disciplines, but rather interdisciplinary concepts to which scholars from many disciplinary backgrounds can contribute. At Utrecht University, those themes are “dynamics of youth”, “institutions for open societies”, “life sciences”, and “pathways to sustainability”. At UCSD, the six themes are “advancing fundamental knowledge”, “understanding cultures and addressing disparities”, “shaping and engaging with technology”, “conserving the planet and exploring the universe”, “studying human

knowledge and creativity”, and “breakthroughs in human health”. Wageningen also has six themes, albeit all more tightly related to life sciences and the environment, in keeping with that institution’s profile. Other institutions may also claim such research themes but not include them in their strategic plans, leaving them to be enunciated in a separate research plan.

What’s New in 2025?

The real question, of course, is what these strategic plans can tell us about the direction in which higher education is heading. The signals can of course be a bit subtle: much of the terrain within strategic plans is given to perennial topics like “teaching”, “research” and the like, all of which must of course be “excellent”, “world class”, etc. What can be detected however, are changes of emphasis; the foregrounding or backgrounding of one set of ideas or another. In such shifts of emphasis, we can see clues as to how the top ranks of global academia see the tasks of universities evolving. These shifts are never entirely unidirectional; someone is always bucking the trend.

In terms of the way plans were timed and framed, there were a few oddities. While in most of the world, strategic plans have specific time frames (mostly five or ten years), in the United States it is not uncommon for a plan to be essentially infinite, or “until we feel like putting out another one”. The new plans at Arizona and Illinois both fit this description, as did the plans of Michigan State and UC San Diego (both of which were technically “refreshes” of existing plans). Elsewhere, plans mostly stuck to the length, with the exception of ETH Zurich, which replaced the hitherto-standard four-year plan with a ten-year plan.

The new plan at Sorbonne University is unique in the sense that it looks nothing like a regular university strategic-plan – instead, it is a 129-page doorstopper of analytical prose leading to recommendations around ten key issues. This was an interesting choice because it



was much less strategic than the university's previous plan, which focused to a large extent on issues of positioning and branding (the university is a new creation, formed from a merger of two institutions in 2018). The plan at the University of Barcelona is also not really a plan in the usual sense: it enunciates four themes at the outset but then moves quickly to a set of task lists for each member of the university's executive team, many of which have little link to the four themes. It is, in a very real sense, a simple task list.

In terms of strategic themes that are on the decline, it should not be a surprise to learn that most American institutions in our survey downplayed the issue of Equity, Diversity and Inclusion in their new plans (the exception here being Penn State, which – daringly, given the times – included Diversity, Equity, Inclusion and Belonging as one of its five key themes).

As for themes which have grown in impact, there were effectively two, one predictable and the other less so.

The more predictable of the two was the area of **Digitization and Artificial Intelligence**. About a third of institutions with new plans (Illinois, Zurich, Carnegie Mellon, Utrecht, Aarhus, Milan, Manchester, and Western Australia), placed greater emphasis on the notions of digitization (or “digital leadership”) and artificial intelligence in their new plans, with the latter often being hedged in euphemisms about “ensuring AI has a human touch”. These concepts were most often applied to teaching/instruction, less often to research, and occasionally to university operations.

The more surprising change is the extent to which universities emphasized **partnership and collaboration**. Almost half of all plans made reference to the need for universities to improve their partnerships with businesses and other educational institutions, especially UC San Diego, the University of Illinois, the University of Arizona, Sorbonne University, Utrecht University, Erasmus University Rotterdam, the University of Milan, and the University of Western Australia. This figure would rise to almost two-thirds if concepts like “serving the communi-

ty” (almost de rigeur among US land grant universities) were included. The University of New South Wales emphasized the related notion of “convening”; Hebrew University emphasized international connections specifically, which seems to be a response to the rising tide of international boycotts of Israeli institutes than anything else. What is interesting about this trend is not that institutions think that partnerships are important; that should be a given. Rather, it is the understanding that the capacity to initiate and sustain partnerships is a powerful source of institutional advantage. For institutions that may have developed thinking that partnerships are things that develop from the bottom up (i.e. with individual researchers as the source), this is a big shift in thinking.

Best Strategic Plan of 2025

There were a number of interesting plans this year, but from the standpoint of sheer ambition, it would be hard to overlook the University of Manchester's plan From Manchester to the World. While it contains its share of annoying buzzwords (e.g. “North Star”), what is intriguing is the way it is organized around five “big leaps”. Two of the five are pretty standard (“research excellence to impact”, “a powerhouse of innovation”) and can mostly be ignored. But the other three are worth looking at in depth.

The first theme of interest is “[Digital Inside and Out](#)”, and it's fascinating. The plan proclaims a goal of making University of Manchester a global powerhouse in online education, which is not something you see that often from a major research university (the strategy suggests they will get to 50% of total enrolment being online by 2035 – only Arizona State University is currently at that level among big research institutions). It includes the usual references to the use of AI in both teaching and administration, but it also references significant new investments in digital education and – more uniquely – investing in ensuring both that staff have the capabilities to maximize online investments and to embed digital skills into the curriculum.



Another key theme is “[The university to partner with](#)”. Of the many institutions putting an increased emphasis on partnerships, this is one that perhaps most directly fleshes out what they mean in terms of becoming the most effective possible partners. The tactics listed in this document may not support the goal as effectively as they might think, but the fact that Manchester recognizes that partnerships aren’t something that just happen spontaneously is important.

The final theme of interest is “[Flexible, personalized and digitally-enable learning](#)”. Again, the tactics may not all be correct, but the ambition is pretty staggering. The key commitment is to embed credit-bearing work-study opportunities into every student pathway, including those studying online, thus making Manchester the UK institution of choice for what partner-enabled learning (also called work-integrated learning in North America). To get there will require a lot of integrated thinking about the use of technology in classrooms, curriculum re-design, a re-thinking student assessment, and, of course, the ability to handle partnerships.

It all amounts to a very big commitment which may not come off. But no one can accuse Manchester of not aiming high. Many universities could learn from this example.



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