



Malaysia

**Global Student Flows
January 2026**

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Contents

Contents	04
Foreword	06
Executive summary	09
2030 outlook	11
The three scenarios for 2030	14
Outbound trends	19
Student origins	23
Drivers for growth	31
International student trends	34
Methodology	38

Foreword



Jeroen Prinsen

Executive Director
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I am delighted to present the Global Student Flows: Malaysia report. For nearly a decade, the Global Student Flows Initiative has provided trusted insights to governments, universities, and higher education leaders worldwide. This year represents an important evolution in our approach: By integrating extensive QS datasets – including the International Student Survey and institutional performance indicators – with advanced student mobility modelling, we offer the most comprehensive view yet of Malaysia's international education landscape.

Malaysia has rapidly gained prominence as an emerging global study destination. Building on its long-standing strengths – cultural diversity, multilingual environment, strategic geographic position, and high-quality transnational education ecosystem – Malaysia continues to deepen regional partnerships, strengthen its higher education infrastructure, and invest in research capacity. Even before the COVID-19 pandemic reshaped global mobility patterns, Malaysia was redefining its position in the higher education ecosystem, moving confidently from a regional hub to an increasingly influential global player.

At a time when traditional destinations such as the UK, Australia, Canada, and the US have tightened visa regulations, introduced student

caps, or increased compliance pressures, Malaysia has taken a contrasting path. It has expanded collaboration across Southeast Asia, South Asia, the Middle East, and Africa, creating accessible pathways for students and fostering an environment that values cultural exchange and academic innovation. While financial pressures challenge many higher education systems, Malaysia's sector continues to mature, diversify, and strengthen its global appeal.

This report offers a wide-angle analysis of Malaysia's inbound and outbound student mobility. Using an evidence-based modelling framework, we present potential futures for international recruitment through 2030 under three scenarios: Regulated Regionalism, Hybrid Multiversity, and Talent Race Rebound. These scenarios provide leaders with strategic foresight to navigate uncertainty and seize emerging opportunities.

In addition, we analyse Malaysia's mobility trends, anticipate possible growth trajectories through 2030, and integrate fresh insights from the QS International Student Survey. Together, these findings inform practical recommendations to help universities refine recruitment strategies, improve student engagement, and enhance retention.

At QS, our commitment to supporting Malaysia's higher education ambitions is unwavering. The insights in this report reflect only the beginning of what is possible through partnership with QS. Our teams deliver advanced analytics for benchmarking, connect institutions with prospective students worldwide, and cultivate innovation and skills development to support long-term, sustainable growth. With deep, data-driven expertise in global higher education, we stand ready to help Malaysia's universities shape their role in a moment of rising potential – and empower them to succeed on the world stage.



Your higher education partner

In today's challenging times, universities are reviewing their strategies and preparing for a different future. We are the partner who can help.

With unrivalled data, global reach, and sector expertise, we have deep knowledge of higher education globally and how to drive performance, engagement, and growth.

Why partner with QS

For more than three decades, we've worked in partnership with thousands of universities across the globe.

We help to:

Transform complex data into clear, actionable intelligence

Connect universities with the right students through our platforms, data, and targeted engagement

Support innovation, new models, and market expansion for long-term institutional growth

Provide sector-leading analytics and insights to enable global benchmarking and performance improvement

Map in-demand skills needs to teaching, research, and employability for future workforce readiness

Get in touch to find out more

Report findings

Executive summary

Malaysia is rapidly establishing itself as a leading global hub for international education, driven by affordability, cultural diversity, and a robust transnational education (TNE) ecosystem. We forecast a growth of 8.5% in international student numbers by 2030, making Malaysia one of the fastest-growing major study destinations.

While affordable education drives current inbound flows, future flows will hinge on whether Malaysian institutions can improve their reputation, as the 'Big Four' is still more well-known among employers and academics.

Proximate nations are key source markets

South Asia, East Asia, and Southeast Asia are key source regions, with annual inflow growth rates above 3%.

The Middle East and Africa are also increasing their prominence in Malaysian institutions, supported by scholarships and flexible visa policies.

Skills-first curricula design will drive economic growth

Malaysia faces challenges including skills mismatches and brain drain, but its higher education sector is well-positioned to address these through curriculum reform, industry partnerships, and talent retention initiatives. Affordability and reputation remain top drivers for inbound students.

While we forecast strong growth for Malaysian higher education, there is no single path in the future. Geopolitical tensions, shifting policy environments and competition from other destinations in the Asia Pacific can all dramatically change the outlook for Malaysian institutions. Flexible, scenario-based planning will serve institutions better than committing to a single plan that may not be resistant to potential shocks.

Malaysia's continued success will depend on maintaining the quality and diversity of its TNE offerings, strengthening its reputation, and adapting to changing global mobility patterns.

Three potential scenarios for Malaysia's 2030 higher education sector

- Regulated Regionalism: Malaysia anchors a regionally integrated Asian education network, benefiting from intra-regional student mobility.
- Hybrid Multiversity: Blended online and local delivery with short, high-value in-person mobility, requiring policy reforms for credit transfer and hybrid visas.
- Talent Race Rebound: International education becomes a tool for long-term talent acquisition, with Malaysia needing to align higher education with labour market needs.

Strategic challenges

1. Variable reputation

The reputation of Malaysian institutions has stagnated since 2017. Sustaining steady improvements will firm up future inbound flows as students increasingly seek reputable institutions.

2. Labour market alignment

International students are seeking a clear return on their investment. Higher education systems worldwide are trying to nurture graduates to have the right skills for the future workforce. Can Malaysian institutions work with future-focused industries, adapt their curricula to align with skills needs, and, crucially, prove that their alumni get good jobs?

3. Emerging hubs outside the 'Big Four'

Alongside Malaysia's rise as a global education hub, other destinations across Asia and the Middle East present competition in the recruitment market. Malaysian institutions will need to maintain their differentiating features – affordability being a key one – while broadening their reach, and diversifying and growing their international enrolments.

2030 outlook

Malaysia's outlook as an international student destination remains strong, underpinned by affordability, cultural familiarity, and the rapid expansion of Transnational Education. Our projections show an average annual growth of 8.5% through 2030, placing Malaysia among the fastest-growing major study destinations. Accordingly, international student numbers in Malaysia are projected to reach about 260,000 students by 2030 from 160,000 in 2024.

Shifts in mobility patterns from traditional Western destinations have redirected demand toward Southeast Asia, with China, Bangladesh, and Indonesia together accounting for more than 50% of Malaysia's international student population. Chinese students represent nearly 40% of the total, reflecting regional redirection as visa restrictions and student caps in major Anglophone markets persist. Southeast and South Asia are projected to remain the fastest-growing source regions, expanding at more than 5% annually through 2030.

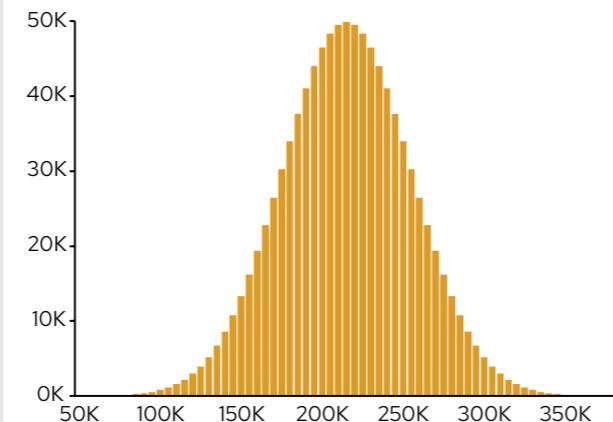
Malaysia's outlook for international student enrolment is underpinned by a sustained surge in student visa applications. In 2024, applications grew by more than 20% for the third consecutive year, signalling not just post-pandemic recovery but a structural strengthening of demand. Four of Malaysia's five largest source markets posted growth above 20%, reinforcing the breadth of this momentum.

At the same time, tightening restrictions in traditional top destinations – particularly those that these source countries typically favour – are diverting students toward more accessible alternatives. Malaysia is benefiting from this displacement effect, offering a comparatively open visa regime and the ability to obtain foreign university degrees. This combination of access, affordability, and international credentialling is positioning Malaysia as an increasingly competitive choice in the regional education landscape.

The foundation of Malaysia's competitiveness lies in its TNE landscape, particularly the branch campus model while private universities account for nearly 70% of international

Figure 1. Simulation frequency for total international students to Malaysia in 2030

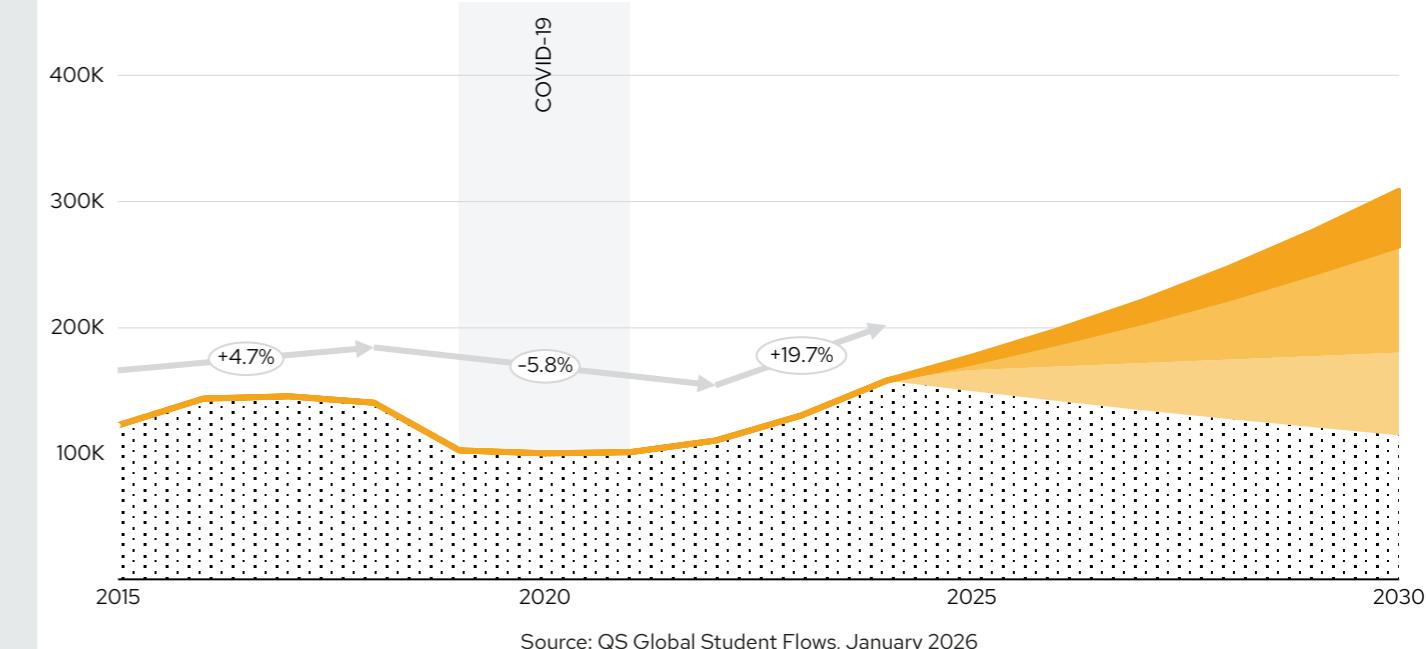
Simulations at various International Student Levels



Source: QS Global Student Flows, January 2026

while emerging markets such as Indonesia and Pakistan, forecast to grow at an annual average rate of 6-9%, present further opportunities. As regional competition intensifies, Malaysia's ability to leverage its branch campus ecosystem effectively will determine whether it can consolidate its position as a leading higher education hub in Asia.

Figure 2. Total international students studying in Malaysia, 2015-2030F



Source: QS Global Student Flows, January 2026

Figure 3. Top 20 source countries – Malaysia

Country	2024 Rank	2024 Flow	2030 Rank	2030 Flow	2024 - 2030 CAGR	Lower to Upper Confidence Interval - CAGR Spread
China	1	65K	1	137K	13.3%	-4% 19%
Indonesia	2	13K	2	21K	8.0%	-6% 13%
Bangladesh	3	10K	3	14K	5.9%	-5% 10%
India	4	6K	4	10K	7.5%	-4% 12%
Pakistan	5	6K	5	8K	6.5%	-5% 11%
Sri Lanka	6	4K	6	6K	4.2%	-2% 9%
Sudan	9	3K	7	4K	3.5%	-3% 9%
Yemen	8	4K	8	4K	1.0%	-4% 5%
Iraq	10	3K	9	4K	3.9%	-3% 9%
Nigeria	7	4K	10	4K	-0.3%	-7% 5%
Jordan	11	3K	11	3K	2.5%	-5% 8%
Maldives	14	2K	12	3K	4.2%	-3% 10%
Saudi Arabia	12	3K	13	3K	2.9%	-4% 8%
Egypt	13	3K	14	3K	1.5%	-7% 7%
Somalia	15	2K	15	3K	2.4%	-4% 7%
Syria	16	2K	16	2K	3.3%	-5% 9%
UAE	17	2K	17	2K	3.0%	-6% 9%
Oman	18	1K	18	2K	3.4%	-3% 8%
Japan	19	1K	19	2K	1.8%	-6% 7%
Palestine	20	1K	20	2K	3.1%	-2% 7%

Source: QS Global Student Flows, January 2026

The three scenarios for 2030

And how they impact Malaysia

**Regulated
Regionalism**

**Hybrid
Multiversity**

**Talent Race
Rebound**

Regulated Regionalism, where geopolitical fragmentation leads to strong intra-regional mobility and emerging destinations accelerate ahead.

Hybrid Multiversity, a world of blended, tech-enabled models that reshape where and how students learn, featuring a strong push towards transnational campuses.

Talent Race Rebound, a high-growth, globally competitive environment where nations aggressively seek international students as future citizens and workers.

Regulated Regionalism

Regulated Regionalism refers to a strategic model in which international education across Asia becomes increasingly structured, regionally integrated, and governed by coordinated national frameworks. Key destination countries, such as Malaysia, Japan, South Korea, Singapore, and Vietnam, anchor this model, collectively shifting global student mobility away from traditional Western hubs toward a network of strategically managed Asian centres.

High-income economies like Japan and South Korea deploy sophisticated, data-driven policies that link international student recruitment to national labour priorities, particularly in high-tech, R&D, and engineering sectors. Singapore, meanwhile, maintains a selective, quality-driven approach that aligns enrolment with high-value industries such as finance and advanced manufacturing, ensuring minimal strain on public services while maximising economic impact.

As global demand for international education continues to grow, student mobility within Asia becomes increasingly intra-regional. Learners from Southeast, Central, and parts of South Asia increasingly choose nearby, culturally familiar, destinations that offer comparable quality and global recognition. Malaysia exemplifies this trend, investing heavily in higher education infrastructure and TNE partnerships, including numerous international branch campuses. Vietnam leverages ASEAN agreements and bilateral frameworks to expand academic exchange. These shifts are reinforced by the spread of regional credit recognition systems and multilateral quality assurance mechanisms that enable flexible, modular study pathways.

This distributed model delivers multiple advantages: it lowers financial barriers, reduces travel costs, and provides a culturally aligned educational experience. For host governments, it also manages social infrastructure more effectively and channels international students into sectors of strategic national importance. Ultimately, Regulated Regionalism represents a balanced, quality-focused framework for international education in Asia, one that aligns academic mobility with national economic goals and the evolving architecture of regional opportunity.

Hybrid Multiversity

Hybrid Multiversity envisions Japan, South Korea, Singapore, Malaysia, and Vietnam as interconnected hubs within a regional ecosystem where international education blends substantial online or local delivery with short, high-value in-person mobility. This model builds on the growing strength of TNE in hubs such as Malaysia and Singapore, elevating local partner institutions to co-equal sites for the early phase of degree programmes. For example, a student from Vietnam could complete foundational coursework online or at a local partner institution before undertaking an intensive, specialised module in a wet lab in South Korea or a design studio in Japan. This structure lowers the overall cost of studying abroad while focusing the overseas experience on elements that cannot be replicated digitally, such as clinical practice, language immersion, or professional engagement with industry leaders in advanced economies.

Achieving a fully functional Hybrid Multiversity scenario requires policy shifts that address existing regulatory barriers to online and TNE delivery. Regional initiatives such as ASEAN's Academic Credit Transfer System (A-ACTS) and UMAP's Credit Transfer Scheme (UCTS) provide useful foundations for credit harmonisation, but these frameworks need to evolve from voluntary cooperation into standardised, region-wide quality assurance mechanisms. This would ensure that hybrid and partner-delivered courses are accredited to the same level as in-person instruction in the host country. At the same time, micro-credentials, already being implemented in countries such as Malaysia to address skills gaps and support lifelong learning, should be systematically incorporated into final transcripts across participating destinations. This would provide employers with a transparent record of competencies gained during the local or online phase.

The most critical reforms involve visa and post-study work policies, which currently reward full physical attendance. To enable Hybrid Multiversity, and the potential benefits for Malaysia and the wider Asian continent, host countries such as Japan and South Korea should introduce a "Hybrid Study Visa" that recognises accredited online or local study as part of the total programme duration and allows simplified short-term entry for the in-person phase. Post-Study Work Visas should also account for total academic engagement, including online and TNE components, rather than only time spent physically in the host country. These reforms would enable students who complete part of their degree locally to retain full post-graduation work rights, strengthening incentives to adopt this flexible, cost-efficient model. The Hybrid Multiversity ultimately aligns regional mobility with national skill priorities, creating a scalable framework that balances access, quality, and economic relevance across Asia.

Talent Race Rebound

The Talent Race Rebound scenario could unfold most intensely in East Asia, where structural workforce shortages and demographic pressures are among the most acute globally, particularly in Japan, South Korea, and Singapore. Malaysia is not exempt from these challenges, with a declining birth rate, and rapidly ageing population.

Advanced economies are repositioning international education from a tool of cultural exchange to a strategic mechanism for long-term talent acquisition. Critically low birth rates and rapidly ageing populations have created an urgent need to address labour deficits across multiple sectors, a challenge that has become far more immediate than in many Western countries. In response, Japan and South Korea, facing some of the steepest population declines worldwide, are moving swiftly to relax administrative constraints on international students. While not facing such stark demographic challenges, Malaysia has opened its post-graduate visa to 32 countries, and introduced the Malaysia Graduate (Social) Visit Pass – initiatives that will undoubtedly induce demand in Malaysia study.

In keeping with this Rebound dynamic, East Asian governments are aligning higher education more closely with national labour strategies and industrial needs. South Korea has made its universities a direct pipeline for skilled STEM graduates, offering accelerated residency and citizenship for top performers. Japan is expanding post-study work rights and skilled migration programmes to attract and retain graduates in sectors facing acute shortages, including elder care and information technology. Public investment is also being

channelled into research and innovation ecosystems, with multi-year funding initiatives and global faculty recruitment strengthening institutional competitiveness in Seoul, Tokyo, and Singapore. These measures reflect a clear policy shift: international education is being reimagined as a long-term workforce development strategy rather than a short-term academic exchange.

Simultaneously, governments are tackling infrastructure and quality-of-life challenges that affect international student integration. Recognising that housing shortages and living costs can undermine recruitment efforts, Malaysia, Japan, South Korea, and Singapore are expanding student housing through coordinated public-private partnerships. These initiatives ensure that the growth in international enrolments is supported by adequate urban capacity and social infrastructure. Collectively, these reforms, from simplified visa frameworks to education-industry alignment and permanent migration pathways, are transforming East Asia into a powerful alternative to traditional Western destinations. For families from emerging economies such as Indonesia and Brazil, pursuing a degree in East Asia increasingly represents not just a global education, but a viable and stable route to professional and economic integration within some of the world's most advanced economies.

Outbound trends

Study abroad

Student mobility from Malaysia is one of the increasingly dynamic segments within Southeast Asia, with its trends being shaped directly by policy changes in traditional destination countries. The top four Anglophone destinations are facing a period of disruption, as student flows become more selective and restrictive, constrained due to visa restrictions, lower approval rates, and student caps. These factors have prompted Malaysian students to explore destinations beyond the traditional 'Big Four' for higher education opportunities.

With the rise of Asian hubs, students are now choosing closer alternatives with universities across the region benefitting from this rebalancing of flows. While Malaysia is more focused on improving its domestic institutions and retaining its students, the number of Malaysian students studying abroad reached over 70,000, growing at a rate of 3% from 2022 to 2025. The UK has emerged as the leading destination for Malaysian students. However, enrolments are projected to decline by nearly 2% over the next five years. Malaysia's increasing investments in its higher education sector, aiming to position itself as a regional hub, and the presence of globally recognised branch campuses, are impacting Malaysian students' decisions to study abroad.

Student inflows to Australia experienced a sharp decline during the COVID-19 pandemic, after which the numbers rebounded significantly. In 2024, Malaysia was among the top 5 leading source countries from Southeast Asia, accounting for approximately 2% of Australia's international student population.

One major policy change is the introduction of the "Genuine Student" (GS) test from March 2024, which replaced the previous "Genuine Temporary Entrant" (GTE) requirement. The GS test aims to ensure applicants have a clear academic purpose and are not primarily seeking residency in Australia, discouraging migration-motivated applicants. Given this, Southeast Asian students, including those from Malaysia, may face more scrutiny in the visa process compared to applicants from other regions. In line with these emerging challenges, Malaysian students are increasingly seeking alternatives closer to home. Mobility to China and Singapore is projected to grow by 2% and 4% through 2030, driven by geographical proximity, cultural familiarity, and the expansion of scholarship initiatives.

Looking ahead, outbound mobility from Malaysia is experiencing a new phase of diversification. As the traditional anglophone destinations appear more restrictive with visa approvals and financial requirements, students are increasingly exploring alternative study destinations. With regional education hubs gaining ground by offering quality education closer to home - a cost-effective alternative with greater cultural alignment, rising intra-regional cooperation is further accelerating this shift.

Transnational education

The outward expansion of transnational education (TNE) in Malaysia marks a notable evolution from being a regional hub that hosts foreign universities to an active exporter of higher education. The country's universities are increasingly extending their presence abroad through branch campuses, cross-border collaborations, and innovative programme delivery models. This outward movement aligns with the internationalisation agenda set under The Malaysia Education Blueprint 2015–2025 (Higher Education), strengthening Malaysian institutions as globally competitive and regionally influential players.

Public universities are leading this expansion through strategic offshore ventures. Universiti Kebangsaan Malaysia (UKM) has become the first Malaysian public university to establish a fully operational branch campus overseas, located in Lusail, Qatar. The campus offers undergraduate and postgraduate programmes and serves as a platform for academic diplomacy and cross-border collaboration between Malaysia and the Middle East. Similarly, Universiti Malaya (UM) is developing its first international branch campus in Shandong Province, China, aimed at enhancing Malaysia's higher education visibility and fostering research and innovation linkages with Chinese partners.

Private universities are also playing a significant role in advancing Malaysia's outbound TNE agenda. Sunway University and Lancaster University's TNE partnership is one example of this, winning the inaugural UK-Malaysia Educational Institutional Partnership Award in 2022. The partnership established the Future Cities Research Institute, as well as "creating jobs" and "encouraging knowledge transfer," according to the award's creators, British Council.

UCSI University further strengthens Malaysia's TNE footprint through a broad portfolio of international partnerships in countries within Asia. These collaborations adopt diverse delivery models, including licensing arrangements, 'flying faculty', and dual degree programmes. Such flexible approaches enable Malaysian institutions to deliver education globally without necessarily establishing full physical campuses, expanding Malaysia's educational reach through cost-effective models.

Together, these initiatives signify Malaysia's transition from an education-importing nation to a global provider of higher learning. By leveraging partnerships, flexible delivery systems, and international collaborations, Malaysia's institutions are extending their reach, fostering intercultural exchange, and enhancing the country's role as a key player in the evolving global higher education landscape.

Online and hybrid transnational education

In recent years, Malaysia has emerged as one of Asia's most active players in digital and hybrid higher education, reshaping how cross-border learning takes place across the region. Driven by rapid technological progress, policy support, and student demand for flexibility, Malaysian universities have significantly expanded their online and blended offerings, connecting learners both within and beyond Asia. The shift, initially accelerated by the pandemic, has since evolved into a strategic direction for the country's higher education system, aligning with its national goal of attracting 250,000 international students by 2025 through a mix of on-campus and transnational learning options.

Malaysia's strong regulatory foundation has enabled this transformation. The Malaysian Qualifications Agency established a Code of Practice for Open and Distance Learning (COP-ODL) to ensure that all online and hybrid programmes meet national standards, both domestically and abroad. Complementing this, Education Malaysia Global Services (EMGS) tracks and recognises international students enrolled in Malaysian online programmes, strengthening Malaysia's position as a credible regional provider of cross-border education.

Universities such as Asia e University (AeU) have taken the lead, offering fully online and blended degrees to students across more than 30 Asian countries. AeU's success illustrates how Malaysian institutions are leveraging

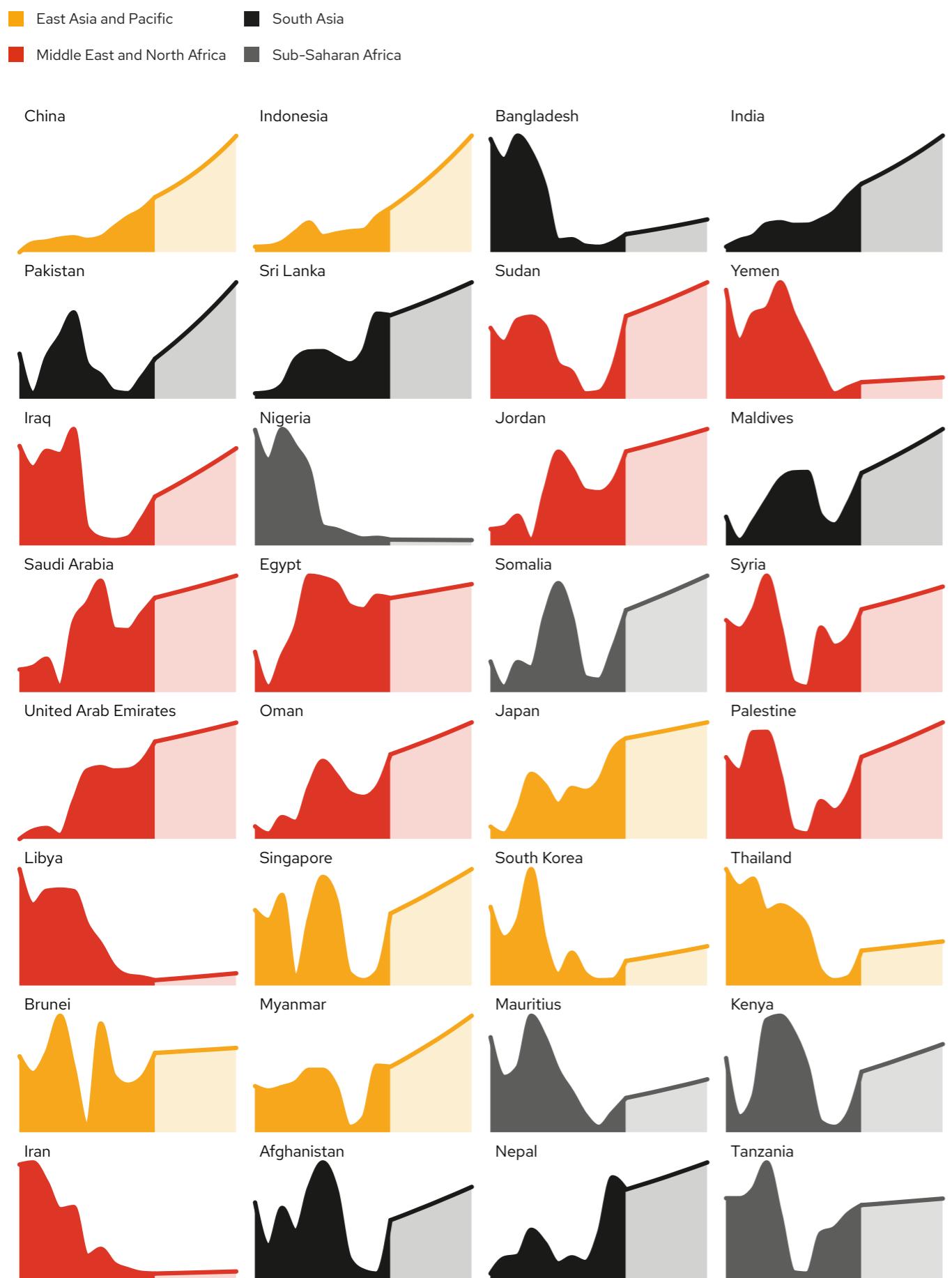
digital delivery to reach learners in markets where Western education is less accessible or financially out of reach. Beyond AeU, several Malaysian universities are extending hybrid programmes to neighbouring countries such as Bangladesh, Indonesia, and Sri Lanka, delivering courses jointly through local learning centres and online platforms. This approach reflects a broader intra-Asian shift towards TNE where flexible cross-border models enable students to access quality education from their home countries.

Malaysia's competitive edge lies in offering Muslim-friendly, affordable, and high-quality hybrid education. These attributes appeal to students from across Asia and the Middle East, especially from countries such as Yemen and Sudan, where mobility is restricted by conflict or cost. As connectivity improves and transnational education models evolve, Malaysia's hybrid and online programmes are expected to play an increasingly central role in driving outbound learning, reinforcing the nation's reputation as a regional hub for accessible and flexible education.

Student origins

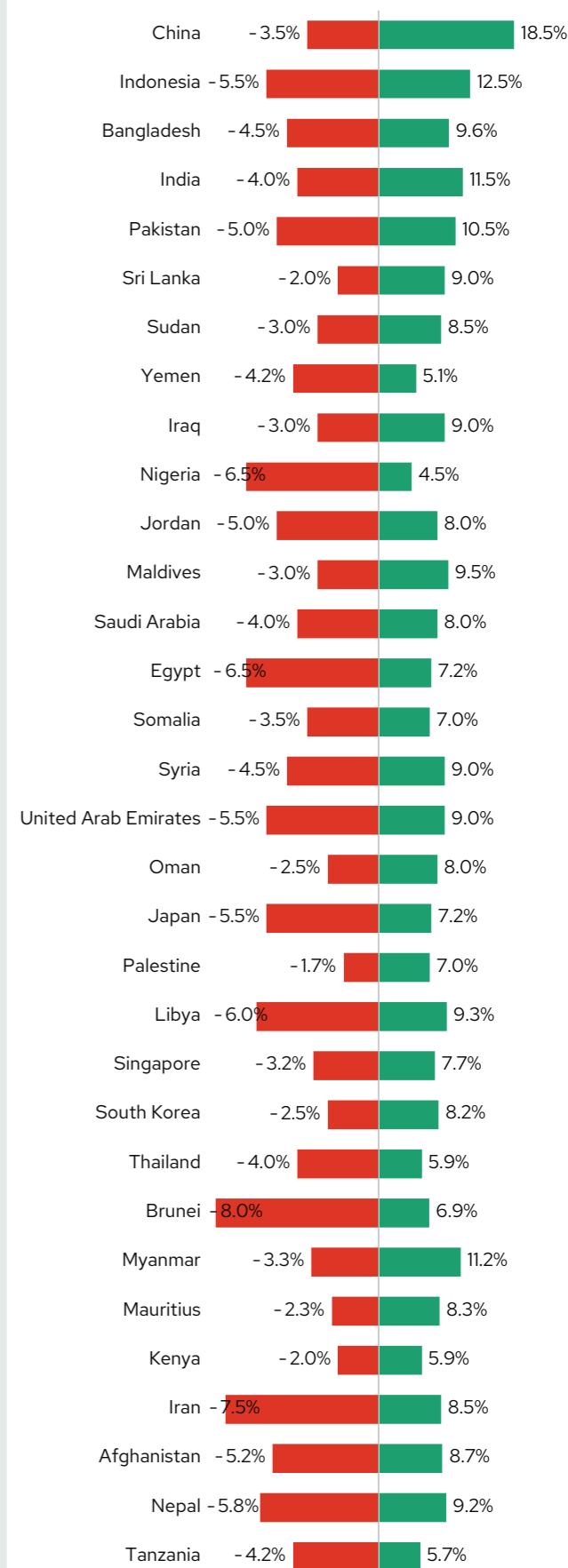
Global Student Flows: Malaysia

Figure 4. Malaysia major student origin growth, 2000–2030F (point estimate growth outlook)



Source: QS Global Student Flows, January 2026

Figure 5. Malaysia Student Origin Growth Outlook. Lower and Upper 95% Confidence Intervals 2024-2030F



Source: QS Global Student Flows, January 2026

South Asia

South Asian student flows to Malaysia are poised for steady growth, with student inflows projected to rise by about 5% annually between 2024 and 2030. The country is consolidating its position as one of Asia's leading higher-education hubs, benefiting from tightening visa regimes in traditional Anglophone destinations and a growing preference among students for more affordable alternatives.

This expansion is driven by Malaysia's strong TNE network, particularly its foreign branch campuses such as those of the University of Nottingham, Monash University, and Curtin University. These institutions offer Western degrees at lower costs and have become central to Malaysia's appeal to South Asian students.

Bangladesh remains Malaysia's largest South Asian source market, with over 10,000 students and enrolment growing at an average of roughly 4% between 2019 and 2024. This growth is expected to continue at about 6% through 2030, supported by scholarships covering tuition and living costs, and the Graduate Plus Visa that enhances post-study employment prospects.

In 2024, India and Pakistan each accounted for about 4% of Malaysia's international student population. Indian enrolments rose by 21% and Pakistani by 12% from 2022 to 2024, with both expected to continue growing at around 6-7% annually, over the next five years. Malaysia's English-language programmes, work opportunities under the Graduate Pass scheme, and cultural familiarity have made it a natural extension of South Asia's higher education market.

Malaysia's reputation for academic quality is further reinforced by rising global rankings for its public universities, including Universiti Malaya and Universiti Kebangsaan Malaysia. These universities continue to rise in the QS World University Rankings. In addition, affordable tuition, safety, and straightforward visa processes round out its competitive advantages.

With South Asia's student population expanding rapidly, Malaysia is set to capture a growing share of intra-Asian mobility, driven by a mix of affordability, proximity, and credible academic standards.

East Asia

Malaysia is set to deepen its role as a regional education hub, with student inflows from East Asia expected to grow by about 4% annually over the next five years. The country's combination of quality education, lower tuition costs, and proximity has made it an appealing alternative to traditionally leading Western destinations, the US, the UK, and Australia.

Chinese students drive much of this growth, accounting for roughly 40% of Malaysia's international student body in 2024. Their numbers have risen by over 30% annually over the past five years, reaching around 60,000. This rapid expansion was driven by trade tensions between China and the US, along with growing concerns about social inclusion and cultural distance in Western universities, accelerating this shift toward regional options. However, growth is expected to moderate over the next five years at a rate of around 13% annually.

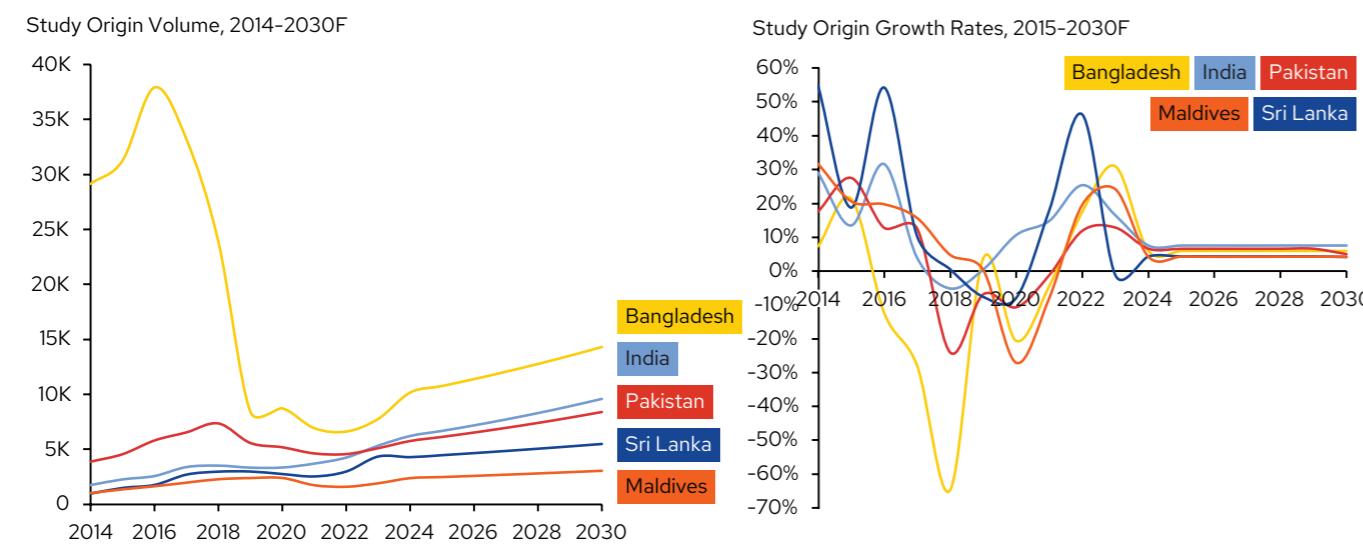
Japan and South Korea are also emerging as steady source markets, collectively accounting for around 2% of Malaysia's international students. Initiatives such as Campus Asia,

originally launched by China, Japan, and South Korea and later expanded to include ASEAN members like Malaysia, have promoted regional academic exchange and strengthened Malaysia's links with East Asian universities. The depreciation of the yen and the high cost of Western education have encouraged more Japanese students to study in Malaysia, where enrolments have grown by about 20% annually since 2022. However, they still represent only about 1% of the total number of international students.

Malaysia's reputation is further supported by the presence of foreign branch campuses, such as those of Monash University and the University of Nottingham, which offer globally recognised UK and Australian degrees at lower costs. Employment prospects after graduation remain a key draw for East Asian students.

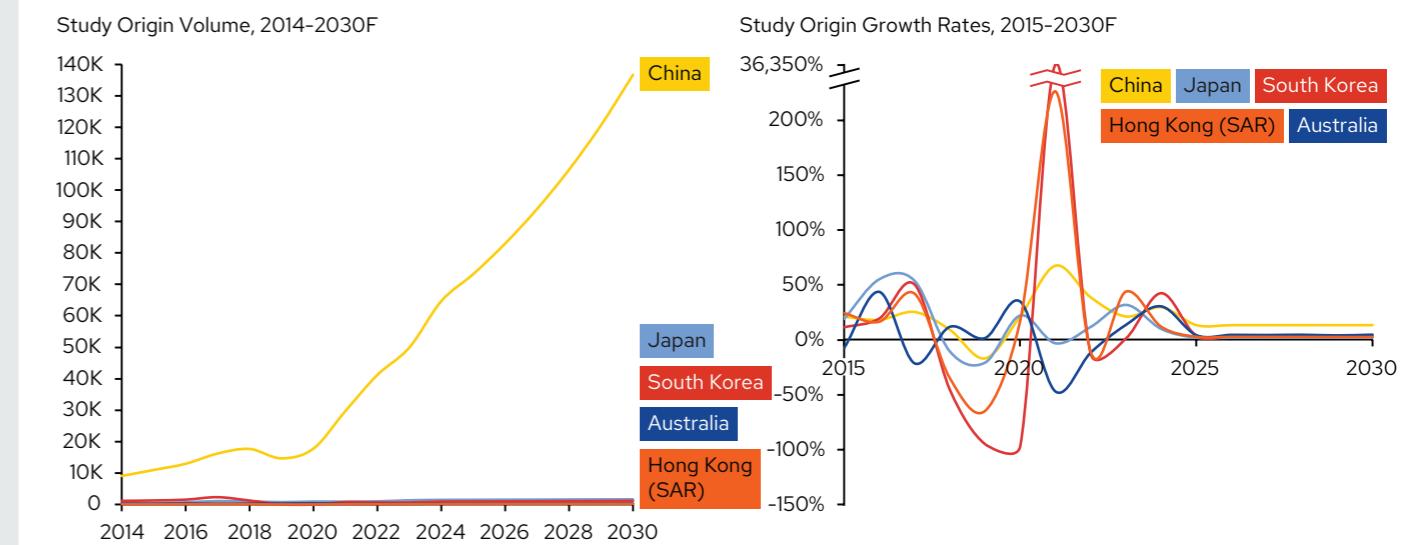
Challenges remain, including differences in academic culture, language barriers, and limited post-study work rights. Yet Malaysia's steady internationalisation drive and growing network of regional partnerships continue to strengthen its position as a credible and cost-effective destination for East Asian students.

Figure 6. Malaysia Student Origin Growth, 2014-2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, January 2026

Figure 7. Malaysia Student Origin Growth, 2014-2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, January 2026

Middle East and North Africa

Malaysia's appeal as an education destination for students from the Middle East and North Africa is strengthening, with enrolments expected to grow by more than 3% annually over the next five years. The rebound follows several years of decline and reflects policy reforms, expanding scholarships, and closer diplomatic ties between Malaysia and MENA countries.

Yemen and Iraq now rank among Malaysia's top ten source countries, drawn by cultural and religious familiarity as well as the country's stability and accessibility. As of 2024, students from the MENA region make up about 15% of Malaysia's international cohort. In the second quarter of 2025 alone, Malaysian universities received roughly 5,000 applications from

the region, the third-largest regional share of total applicants.

The Graduate Pass has been key in boosting student flows. The policy allows graduates from 23 countries, including Saudi Arabia, the UAE, Qatar, and Egypt, to remain in Malaysia for up to a year to work, travel, or continue their studies. This flexibility has encouraged sustained growth, with MENA enrolments expanding at a rate of 17% in 2024.

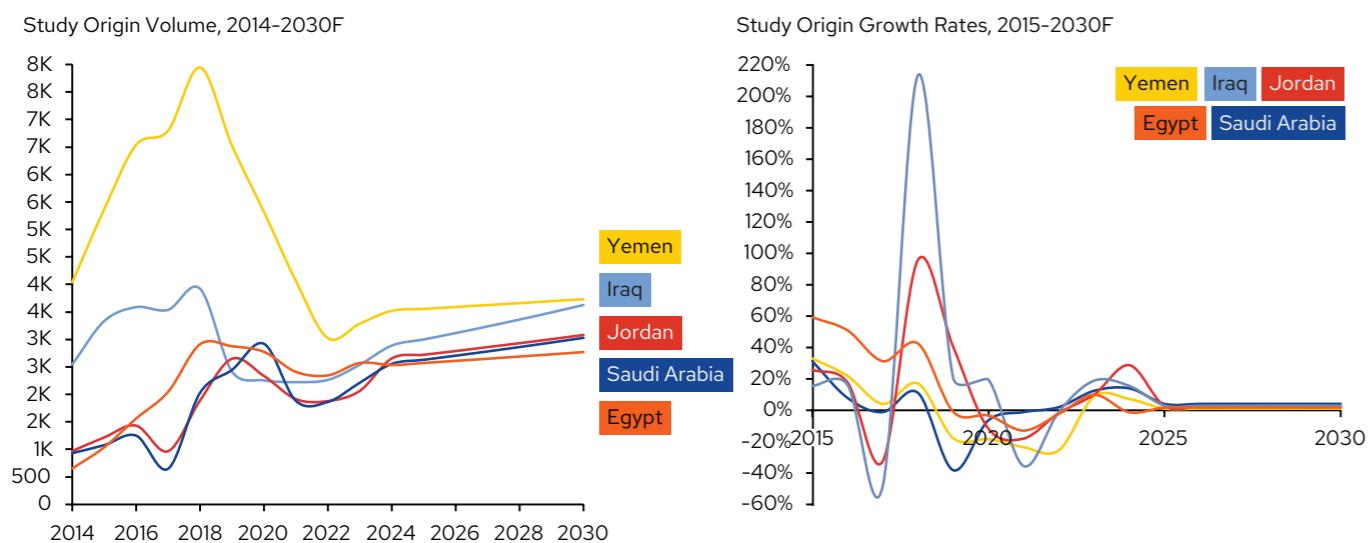
Saudi Arabia's King Abdullah Scholarship Programme has expanded its reach to include Malaysia among its key Asian destinations. This was reflected by Saudi student enrolments in Malaysia, which grew by about 17% over the past two years. This growth is expected to

continue rising at around 3% annually through 2030. Malaysia's Islamic-friendly environment and relatively low cost of living have also strengthened its appeal for Egyptian students, whose numbers are projected to increase by roughly 2% a year over the same period.

Cooperation with Gulf states is deepening. New partnerships with Saudi Arabia aim to establish joint Islamic academic programmes and exchange opportunities aligned with religious and cultural expectations.

Malaysia's mix of affordability, cultural alignment, and supportive visa policies positions it as an increasingly attractive alternative for MENA students seeking quality higher education closer to home.

Figure 8. Malaysia Student Origin Growth, 2014-2030F. Point Estimate Growth Outlook



Source: QS Global Student Flows, January 2026

Southeast Asia

Student flows from Southeast Asia to Malaysia are rising steadily, supported by the country's strategic location, affordability, and growing reputation as a regional education hub. Over the next five years, enrolments are expected to increase at a moderate pace of about 3% as Malaysia strengthens its internationalisation agenda and capitalises on cultural and linguistic ties with its neighbours.

Indonesia remains the largest source of students from the subregion. Between 2019 and 2024, Indonesian enrolments grew by around 5% annually and are projected to rise by nearly 8% through 2030. Short travel distances, lower living costs, and Malaysia's Islamic-friendly environment have made it a practical and culturally compatible option for Indonesian families.

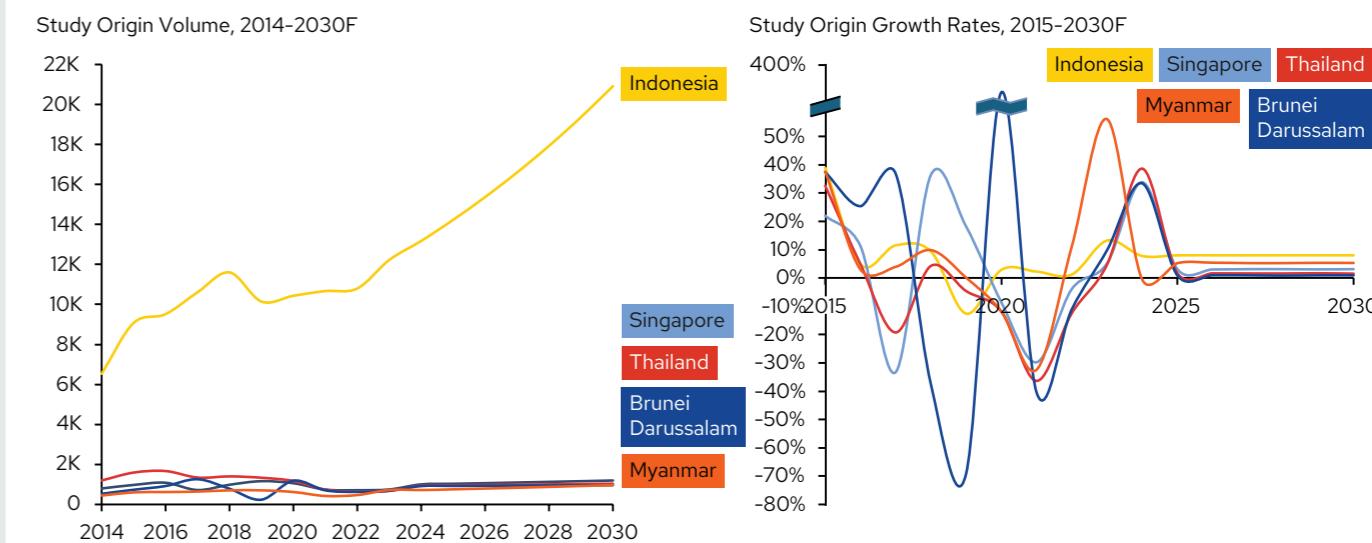
Student numbers from Singapore and Myanmar are also growing, expanding by about 19-24% a year between 2022 and 2025. For Singaporean students, Malaysia offers quality alternatives to competitive domestic universities, particularly

in disciplines such as medicine, dentistry, and business, at a fraction of Western tuition fees.

Malaysia's higher education system continues to gain international credibility through globally recognised public universities and foreign branch campuses from the United Kingdom and Australia, which provide Western degrees at significantly lower costs. The widespread use of English in instruction further enhances accessibility for ASEAN students.

Government initiatives under the Malaysia Education Blueprint 2015-2025 aim to attract 250,000 international students by improving visa processes and student services. As economic pressures and tighter visa policies in the West reshape global mobility, Malaysia's mix of affordability, proximity, and cultural alignment positions it as a leading destination for Southeast Asian students seeking globally recognised education closer to home.

Figure 9. Malaysia student origin growth, 2000-2030f. Point estimate growth outlook



Source: QS Global Student Flows, January 2026

Rest of the world

Malaysia is strengthening its role as a regional education hub, drawing a growing mix of students from beyond Asia. Although most international enrolments still come from Asia and the Middle East, students from other regions now make up around 10% of Malaysia's total. The expansion of foreign branch campuses that offer globally recognised degrees at lower cost has reinforced Malaysia's position as a competitive alternative to Western destinations.

Student inflows from Africa have increased steadily led by Nigeria and Sudan, with the region projected to grow by about 3% annually from 2024 to 2030. Both countries now rank among Malaysia's top ten source markets. Scholarship and cooperation programmes run by Malaysian ministries have encouraged this rise by reducing financial barriers for students from developing economies. The combination of affordable, English-medium education and easier access has made Malaysia an appealing option for African students seeking international qualifications.

Government initiatives continue to shape these flows. The Malaysia Education Blueprint 2015-2025 set a target of attracting 250,000 international students by 2025, supported by measures to simplify visa procedures and enhance student services. The Education Malaysia Global Services has made admissions more accessible, while the Graduate Pass allows eligible graduates to stay for up to a year to gain work experience. However, eligibility is limited to students from 32 nationalities, excluding much of Latin America and Sub-Saharan Africa.

Student mobility from Europe and North America remains small, accounting for just 2% of total enrolments. Malaysia's multicultural environment and growing network of foreign campuses have, however, begun to attract more Latin American students, with numbers expected to rise by about 3% over the next five years from a low base.

Despite competition from established Western destinations and relatively low global visibility, Malaysia's expanding transnational education partnerships and scholarship support continue to strengthen its position as a cost-effective hub for quality higher education.

Drivers for growth

Labour market dynamics

Malaysia's labour market benefits from a relatively young workforce, diversified economic sectors, and strong participation in manufacturing and services. However, it faces several frictions that limit productivity growth and upward mobility.

A central issue is the mismatch between skills produced by the education system and those demanded by industry. In the QS World Future Skills Index's Skills Fit indicator, Malaysia is outperformed by many APAC peers, indicating that employers frequently report shortages in future-focused skills, such as those required for digital, green and AI jobs. This mismatch stems partly from uneven higher-education quality and limited industry-university collaboration. These gaps are compounded by Malaysian organisations' belief that AI and information processing technologies, robotics, and energy generation are the most likely technology

trends to drive business transformation – without highly skilled graduates, Malaysia could fall behind in the industries that will drive future growth.

Additionally, brain drain remains a concern. Nearly 1.86m Malaysians left the country over the past fifty years, according to Digital Minister Gobind Singh Deo. Many skilled Malaysians migrate for better opportunities, wages, or research environments, thus reducing the available talent pool and poses long-term implications for innovation capacity.

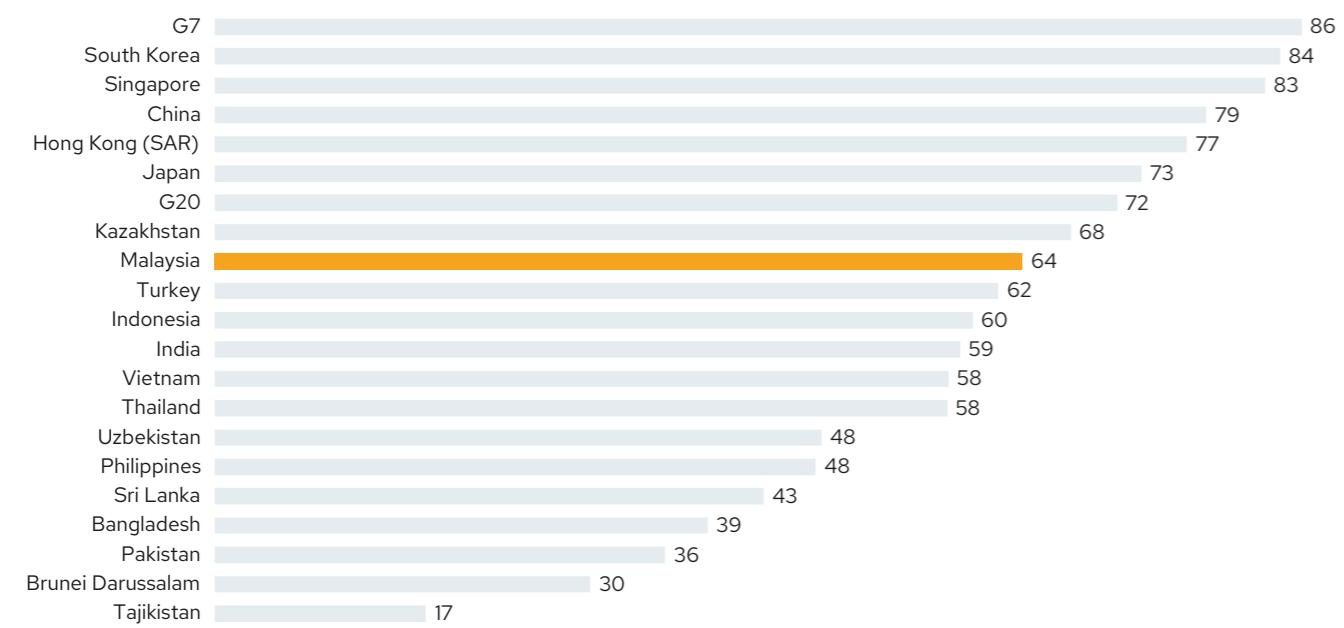
Higher education can play a transformative role in addressing these issues. Universities can update curricula to align with emerging technologies, embed industry-driven learning outcomes, and expand apprenticeships and micro-credential programmes. Strengthening partnerships with employers ensures graduates gain real-world experience, closing skill gaps more effectively.

Furthermore, higher education institutions can become innovation hubs, supporting research commercialisation, entrepreneurship, and start-ups that create high-skilled jobs. Targeted scholarships and talent-retention initiatives can help mitigate brain drain by providing meaningful career pathways within Malaysia. In the short-term, the increasing number of international students arriving in Malaysia can play a crucial role in filling high-impact skills

gaps. With a growing international student population, ensuring these students can work – and can work in highly skilled sectors – offers a potential lifeline as businesses grapple with skills gaps.

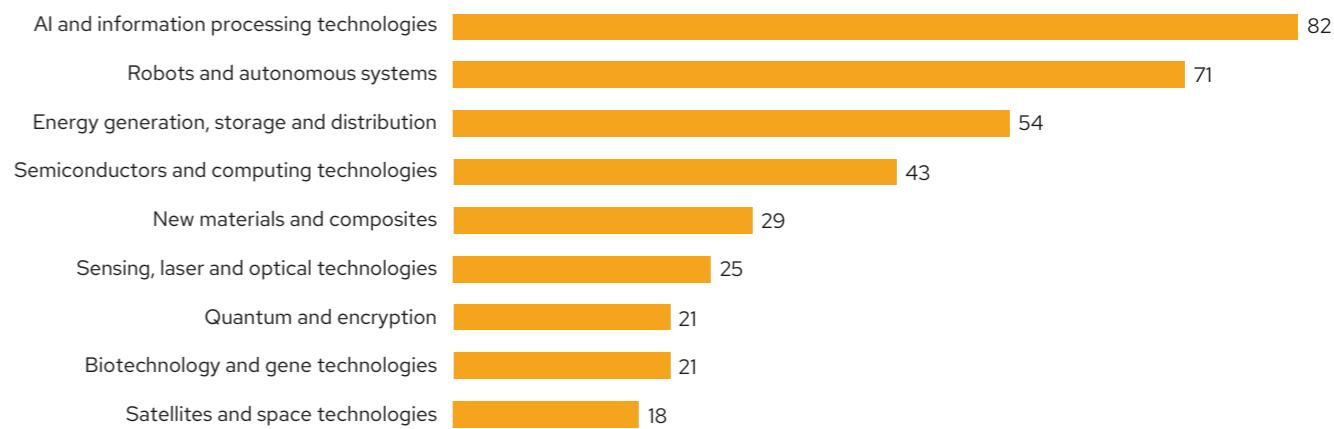
Overall, a more agile, industry-responsive higher-education system is essential for Malaysia's continued transition into a high-value, knowledge-driven economy.

Figure 10. Skills Fit indicator
Asian Locations (normalised score out of 100)



Source: QS World Future Skills Index 2025

Figure 11. Share of organisations surveyed that identify the technology trend as likely to drive business transformation



Source: World Economic Forum Future of Jobs Report 2025

International student trends

Using insights into what students want to future-proof your strategy

Affordability and reputation driving inbound flows

Unlike the 'Big Four', affordability is a key driver of inbound flows to Malaysia. Some 66% of students looking to study in Malaysia consider affordable tuition fee options important when choosing a course. High quality teaching is also deemed important - 44% and 40% identified high graduate employment rate and the course leading to their chosen career respectively as important when making course decisions.

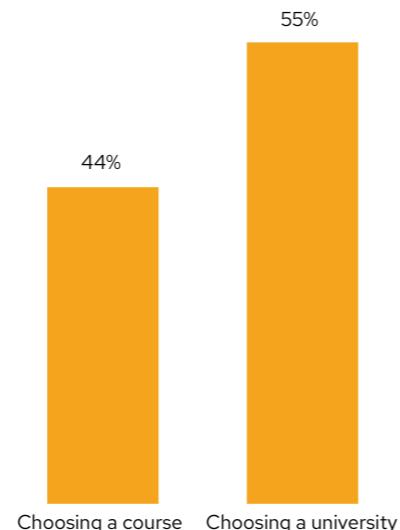
Reputation is also of high importance, When asked for a statement that describes themselves, 45% of students looking to study in Malaysia agreed that "One of the most important things to me is studying at an institution with a reputation for good teaching quality."

Malaysia's reputation is a mixed picture

Reputation remains key for inbound flows. Particularly as the inbound recruitment market matures, Malaysian institutions must grow their reputation among academics and employers if they are to increase market share compared to the 'Big Four'. At the moment, 55% of students looking to study in Malaysia say that reputation is important when choosing a university.

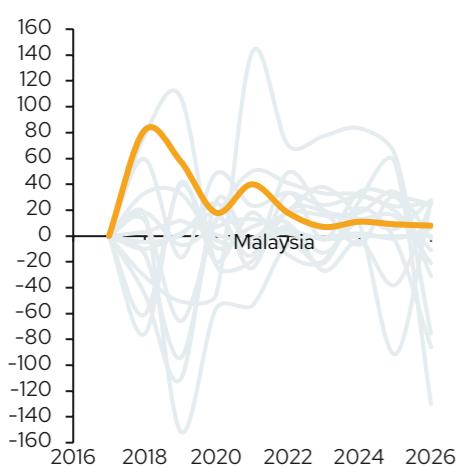
However, Malaysia's reputation has been relatively stagnant compared to 2017 numbers. Malaysia's median Employer Reputation rank has declined slightly, while its median Academic Reputation rank has only increased slightly (Figure 13 and Figure 14). In Figure 12, we see that Employment Outcomes trail Employer Reputation, suggesting that Malaysia's reputation is built on precarious foundations. By equipping graduates with the skills required by employers, and enabling them to articulate their skills in the workplace, Malaysian institutions can reinforce their Employer Reputation. Applied learning and emboldened careers services will help, alongside a concerted effort to communicate graduate excellence back to employers.

Figure 12. Importance of reputation to students when choosing a course and university



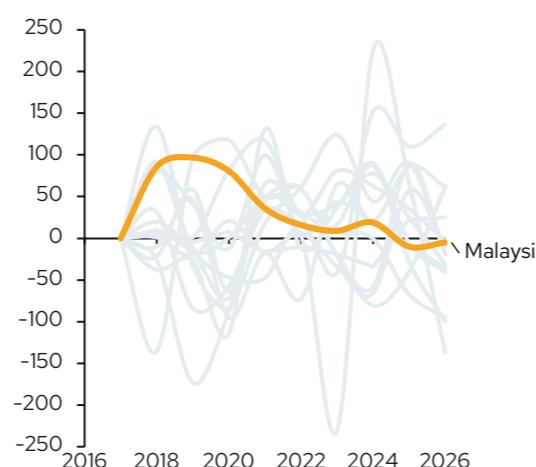
Source: QS International Student Survey 2025

Figure 13. Change in Median Academic Reputation Rank Since 2017



Source: QS World University Rankings

Figure 14. Change in Median Employer Reputation Rank Since 2017



Source: QS World University Rankings

Strategic imperatives for 2030

This report urges higher education leaders to prepare for the future by using scenario-based planning, factoring in the largest influences of global student flows. As Malaysia emerges as a major study destination, universities must plan for a range of scenarios to be agile, adaptable, and enable growth.

Focus on reputation:

Malaysia's institutional reputation has stagnated since 2017, and strengthening it is essential to sustaining future inbound student flows, as students increasingly desire reputable institutions. Institutions need to improve academic and employer recognition to remain competitive.

Align with labour market needs:

International students increasingly demand a clear return on investment. Institutions must align curricula with future-focused industry needs, strengthen industry partnerships, and demonstrate strong graduate employment outcomes.

Other emerging hubs could stunt Malaysia's rise:

Competition is rising as new education hubs grow across Asia and the Middle East. To stay competitive, Malaysian institutions must maintain their differentiators, especially affordability, while diversifying and expanding international enrolments.

Methodology

Global Student Flows

The Global Student Flows (GSF) initiative comprises three core components: QS' *Open Source Framework for Global Student Flows*, a proprietary *Flow Mapping and Analytics Technology*, and a *Scenario-Based Forecasting Methodology* designed to simulate over 4,000 discrete source-to-destination flows. Together, these instruments offer a comprehensive, 360-degree view of the global outlook for international student mobility.

Open source framework

The GSF framework integrates both qualitative and quantitative research within an open-source structure that supports the historical analysis and future forecasting of international student flows. The framework organises 15 core drivers of mobility into three overarching categories - push, pull, and disruption factors. These drivers form the analytical basis for assessing patterns in student movement and are reviewed and refined annually through expert consultation.

The qualitative research process is informed by extensive interviews with global experts, including economists, policy leaders, and institutional decision-makers. These contributors provide deep contextual insight

into specific country-to-country flows, policy settings, and sectoral trends. Quantitative analysis is anchored in both historical datasets and current indicators, supported by HolonIQ by QS' proprietary global flows model. This model employs advanced analytics to simulate multi-factor, high-dimensional data across more than 4,000 unique international student flows.

By combining structured expert insight with data-driven modelling, the GSF framework delivers a robust, adaptive foundation for understanding the forces shaping global student mobility – past, present, and future.

Push factors	Pull factors	Disruption factors
Drivers of outbound mobility from source countries	Determinants of destination market attractiveness	Drivers of volatility and alternative mobility scenarios
Demographics	Academic quality	Geopolitical factors
Economic conditions	Post-graduation prospects	Place-based risks
Loans & scholarships	Affordability (inc. FX)	Capacity constraints
Domestic alternatives	Recruitment infrastructure	Hybrid programmes
Risk factors	Safety and security	Online learning

Push factors: Drivers of outbound mobility from source countries

Push factors refer to the underlying conditions within a student's country of origin that influence the decision to pursue education abroad. These drivers encompass a broad range of demographic, economic, educational, and geopolitical dimensions that collectively shape outbound mobility patterns.

Demographics

This factor analyses population trends and structures within source countries, including youth population growth, urbanisation, and educational attainment levels. Demographic pressures, such as a growing tertiary-aged population, are often strong predictors of increased outbound student mobility.

Economic conditions

The economic context of the source country directly impacts the capacity of individuals to finance international study. A slow economy, low gross domestic product (GDP) per capita,

poor income distribution and overall household wealth can all motivate students to seek more prosperous environments abroad.

Loans & scholarships

The availability of financial support mechanisms such as scholarships, student loans and private funding options plays a significant role in enabling students to pursue study overseas. These instruments help mitigate affordability constraints and expand access.

Domestic alternatives

This factor assesses the quality, capacity, and perceived value of domestic higher education offerings. When local institutions are unable to meet student expectations, the likelihood of outbound mobility increases.

Risk factors

Geopolitical and geo-economic factors, and the environmental stability of a source country can reduce the attractiveness of remaining in-country, and contribute to students' aspirations of studying abroad.

Pull factors: Determinants of destination market attractiveness

Pull factors encompass the characteristics of destination countries that enhance their attractiveness to prospective international students. These include academic reputation, employment outcomes, cost, recruitment infrastructure, and overall safety and wellbeing. Together, these factors influence a student's decision to select a particular destination.

Academic quality

Academic quality refers to the presence of highly-ranked universities and globally recognised academic programmes.

Post-graduation prospects

This factor examines the availability and attractiveness of work opportunities. It includes the accessibility of internships, co-operative education programmes, and post-study employment pathways, especially those aligned with immigration or residency options.

Affordability (inc. FX)

Affordability encompasses the total cost of studying and living in the destination country. This includes tuition fees, living expenses, and currency exchange rates. Destinations that can offer an affordable study location tend to be more attractive to prospective students.

Recruitment infrastructure

This dimension assesses the effectiveness and maturity of international student recruitment systems. It includes agent networks, application processes, and institutional outreach and support throughout the student journey.

Safety and security

Safety considerations include physical security and student wellbeing. This factor evaluates the destination's political stability, health infrastructure, crime rates, and student support services. It also evaluates the destination's inclusivity and the presence of established diaspora communities.

Disruption factors: Drivers of volatility and alternative mobility scenarios

Disruption factors encompass external events and structural shifts that introduce volatility into international student mobility patterns. These variables can either constrain or accelerate mobility depending on their scale, duration, and impact. Key disruption factors include geopolitical developments, health and security risks, infrastructure limitations, and the emergence of alternative models of international education.

Geopolitical factors

This category refers to international and regional developments that influence policy decisions in both source and destination countries. Geopolitical tensions, diplomatic conflicts, and perceptions of political instability, particularly in key destination markets, can shape public sentiment, government regulation, and ultimately the volume and direction of student flows.

Place-based risks

This dimension includes disruptions tied to specific locations or global events that affect students' ability or willingness to travel. These include pandemics, armed conflicts, civil unrest, and natural disasters, as well as logistical challenges such as temporary flight suspensions or travel restrictions.

Capacity constraints

This factor encompasses limitations within destination countries that restrict the ability to accommodate international students. Constraints may include housing shortages, visa processing delays, limited institutional capacity, or insufficient support infrastructure. Conversely, improvements in these areas may significantly enhance student mobility.

Hybrid programmes

Hybrid delivery models, combining online and in-person components, represent an evolving alternative to traditional mobility. These programmes allow students to begin or complete their studies partially in their home country, offering flexibility and reducing the need for long-term physical relocation.

Online learning

Online learning offers a substitute for in-person study, potentially reducing demand for international travel. As digital delivery becomes more sophisticated and accepted, it presents a disruptive force to conventional student mobility models.

Mapping flows

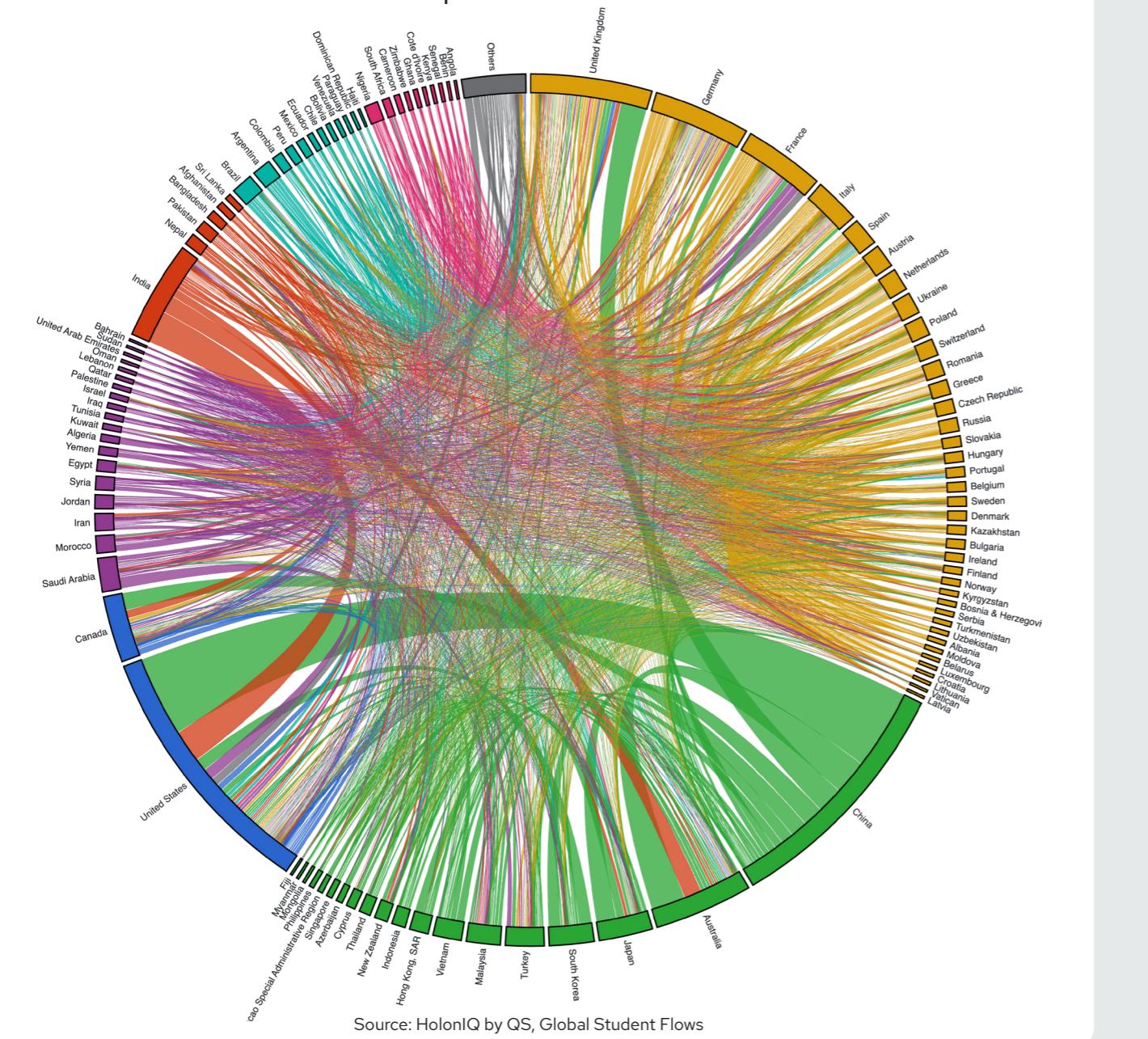
HolonIQ by QS has developed proprietary technology to map and analyse the complexity of global student mobility and cross-border flows. Each year, over seven million students travel from more than 150 source countries to study in over 100 destination countries, representing more than 4,000 unique country-to-country flow patterns.

The platform enables users to analyse over 4,000 discrete flows over time, identifying trends and patterns that inform strategic

planning, policy development, and investment decisions. The platform is designed to simplify the management, evaluation, and forecasting of international mobility and related datasets.

While the current focus of the Flows tool is on country-to-country education flows, the platform is progressively expanding to include subnational (state or province-level) and city-level resolution at both the source and destination ends.

Global Student Flows interactive flows explorer tool



The GSF project employs a Monte Carlo simulation framework to forecast international student mobility across more than 4,000 discrete country-to-country flows. This simulation-based approach integrates probabilistic modelling with expert-informed qualitative research and quantitative machine learning to estimate future volumes under uncertainty.

As illustrated in the figure below, the forecasting model combines three core dimensions:

1. **Push factors** (source country conditions)
2. **Pull factors** (destination country conditions)
3. **Disruption factors** (external shocks and structural volatility)

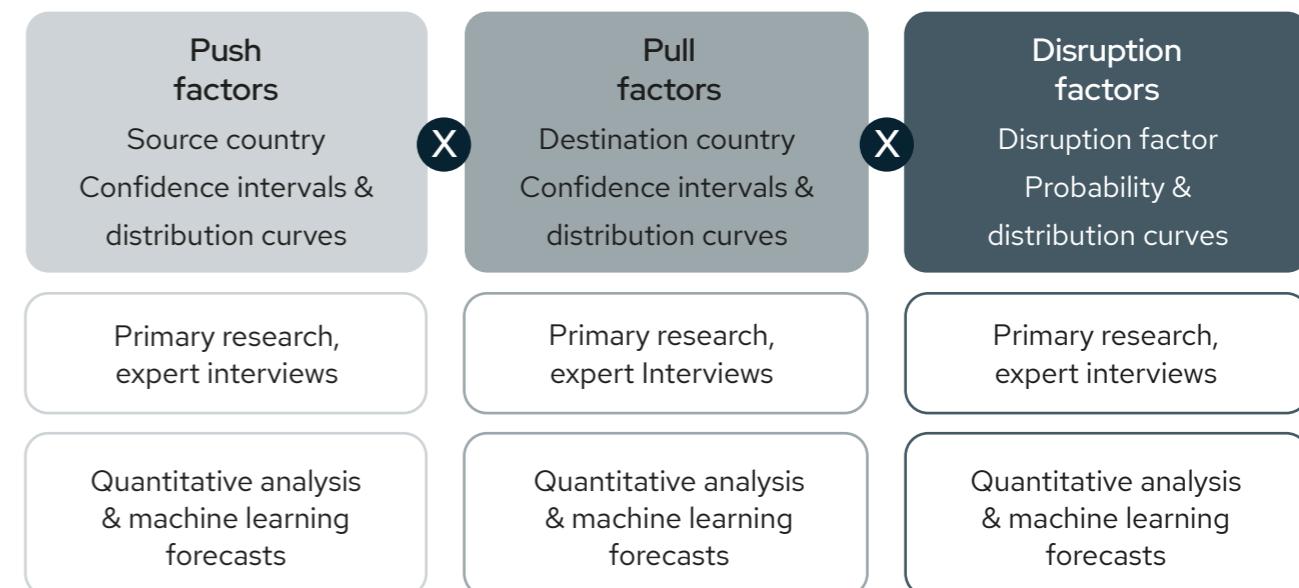
Each factor is associated with a statistical distribution and confidence interval derived from a combination of primary expert interviews and historical quantitative data. Push and pull factors each generate growth rate distributions for every source and destination country respectively, while disruption factors contribute additional probabilistic shifts in overall flow volumes.

For each simulation run, randomised values are sampled from these distributions to produce one unique realisation of global mobility. The model executes one million iterations of Monte Carlo simulations, resulting in a distribution of total international student numbers and enabling robust scenario analysis.

While it is computationally intensive to model all 4,000+ flows individually, the GSF platform utilises detailed simulations for high-priority flows, while grouping long-tail flows under aggregated probabilistic assumptions. This balance allows for both granularity and computational efficiency.

Each iteration of the simulation refines the input parameters through enhanced expert consultation and data enrichment, ensuring continuous improvement of the model. As a result, the GSF Monte Carlo engine offers a dynamic, evolving, and academically rigorous methodology for anticipating the future landscape of international education.

Global Student Flows, open-source framework



Source: QS, Global Student Flows. This work is licensed under CC BY-SA 4.0

QS International Student Survey

The QS International Student Survey offers an unparalleled view into pre-enrolled international students. The 2025 iteration draws on responses from over 70,000 students in 191 locations.

The questions in the Survey are designed to enable higher education institutions to make sound decisions on recruitment and communication strategies. Now combined with Global Student Flows data, we offer a well-rounded view of where students are choosing to study, and how they make that decision.

To understand what matters to students, we ask a wide range of questions about their pre-enrolment journey. We want to know what students prioritise when choosing a location, university and course, and we want to understand what they perceive as high-quality teaching. We ask students how their family influence decision making, and we gather data on the social media and digital channels they use to find study information.

The International Student Survey also benefits from its longevity – 2025 is our 13th edition. The consistency in our questioning allows us to see how students' answers change over time, and predict future trends and shifts. Its yearly format allows us to add new questions to get a snapshot of student perception. Over the past three years, we've gathered crucial data on transnational education, sustainability and Generative AI.

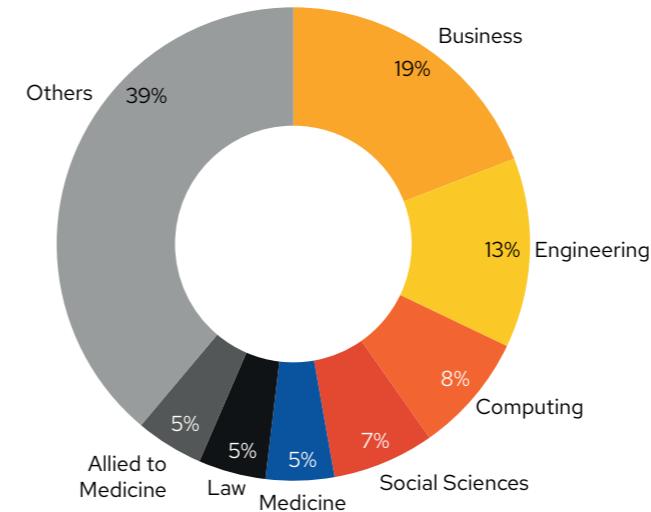
The International Student Survey's robust methodology ensures we truly represent the perception of pre-enrolled international students. Respondents for the International Student Survey are collected in partnership with global universities. This year, we partnered with 146 universities globally, who were invited to share the Survey with their own prospective international students.

Fieldwork for the Survey was conducted between 6 January and April 7 2025, via Qualtrics, an online survey management platform. The Survey contains 50 unique questions, covering a range of topics relating to prospective student decision-making, from their study background to their priorities, marketing communication preferences, through to their principal information sources, career aspirations, and post-study plans.

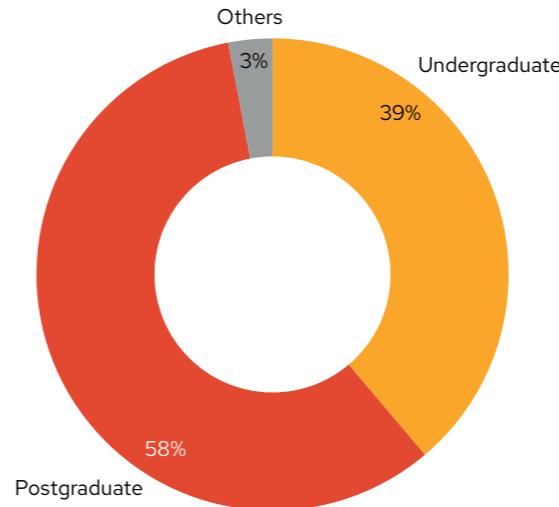
The 2025 iteration of the Survey also contains questions on candidate perceptions of branch campuses, scholarship preferences and opinions on tuition fees. Each institution that took part received a tailored benchmarking report detailing the results of their own prospective students.

International Student Survey respondent demographics

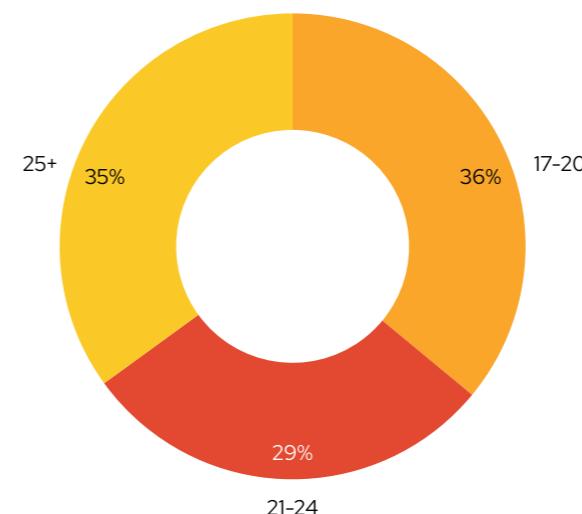
Subject preference



Study level



Age



Source: QS Global Student Flows, September 2025

Sign up for the
QS International
Student Survey
2026



Sources

The Global Student Flows model is built on a diverse and authoritative foundation of international data sources, ensuring high-quality, representative, and up-to-date insights into global student mobility. Drawing from multilateral agencies, national governments, statistical bureaus, and specialised education bodies, the model integrates both inbound and outbound mobility data across all major world regions. These sources reflect the latest available figures on enrolments, visas, migration, scholarships, and institutional capacity, and are harmonised to support robust forecasting and scenario analysis.

Key sources include:

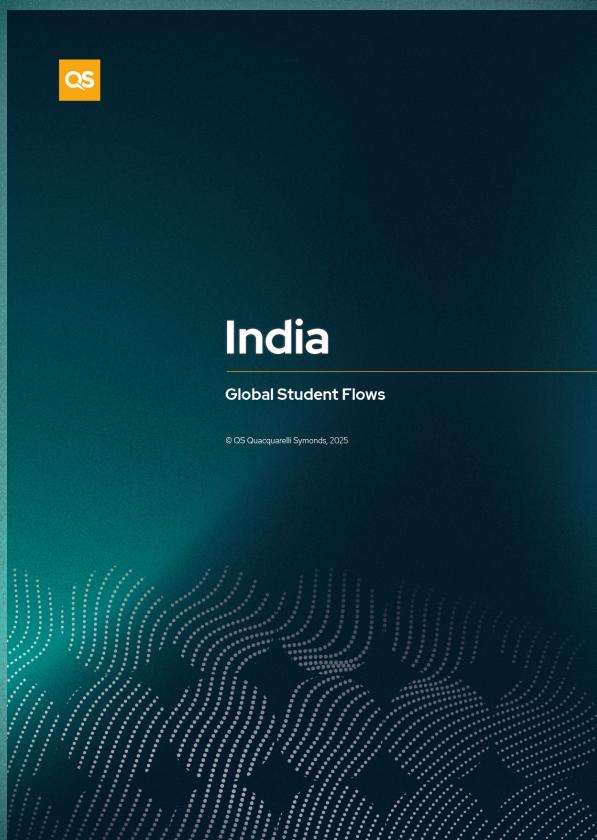
UNESCO Institute for Statistics, 2023
 World Bank Education Statistics, 2021
 OECD, 2022
 Eurostat, 2023
 IOM Migration Data Portal, 2022
 IIE Project Atlas, 2024

All India Survey on Higher Education (AISHE), 2021/22
 Australian Government, Department of Education, 2023
 Belgium Federal Public Service for Education, 2023
 Campus France, 2023/24
 Council of Higher Education (YÖK), 2022
 Department of Higher Education and Training, South Africa, 2022
 Department of Home Affairs – Australia Student Visa Data, 2024
 Education Bureau, The Government of Hong Kong Special Administrative Region of the People's Republic of China, 2023
 Education Malaysia Global Services, 2024
 Education New Zealand (ENZ), Government of New Zealand, 2024
 ETH Zurich, 2023
 Federal Ministry of Education and Research (BMBF), 2024/25
 Federal Ministry of Education, Science and Research, Austria, 2023
 General Statistics Office of Vietnam (GSO), 2023
 Government of Canada, 2023
 Higher Education Commission (HEC), Pakistan, 2023
 Higher Education Statistics Agency (HESA), 2022/23
 Hungarian Central Statistical Office (KSH), 2022
 Immigration, Refugees & Citizenship Canada (IRCC), 2023
 Institute of International Education (Open Doors), USA, 2024/25
 Japan Student Services Organization (JASSO), 2024
 Ministry of Education, Argentina, 2023
 Ministry of Education, Brazil, 2022
 Ministry of Education, China, 2021
 Ministry of Education, Columbia, 2023
 Ministry of Education, Ghana, 2021
 Ministry of Education, Singapore, 2023
 Ministry of Education, South Korea, 2024
 Ministry of Education, UAE, 2021
 Ministry of Education & Science, Czech Republic, 2022
 Ministry of Education and Science, Poland, 2023
 Ministry of Education and Science, Uzbekistan, 2023
 Ministry of Higher Education & Scientific Research (MESRS), 2025
 Ministry of Higher Education, Morocco, 2021
 Ministry of Higher Education, Saudi Arabia, 2022
 Ministry of Higher Education, Science and Technology, Indonesia, 2023
 Ministry of Higher Education, Tunisia, 2021
 Ministry of Science & Higher Education, Russia, 2022
 Ministry of University and Research (MUR), Italy, 2023
 Ministry of Universities, Spain, 2022/23
 National Universities Commission, Nigeria, 2020
 Norwegian Directorate for Higher Education (HK-dir), 2022
 Nuffic, 2023/24
 Philippines Commission on Higher Education (CHED), 2023
 Portugal Directorate - General for Education and Science Statistics, 2023
 State Secretariat for Education, Research and Innovation (SERI), 2023
 Statistics Canada, 2022/2023
 Statistics Finland (Tilastokeskus), 2023
 Statistics Norway (SSB), 2023
 Statistics Sweden (SCB), 2023
 Statistisches Bundesamt (Destatis), 2024/25
 Student and Exchange Visitor Information System (SEVIS), 2023
 Sub-Directorate of Information Systems and Statistical Studies (SIES), 2022/23
 Swedish Higher Education Authority (UKÄ), 2022
 Ukraine State Center for International Education, 2023
 University Grants Commission, Bangladesh, 2023
 Wissenschaft weltoffen, 2023/24

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