BRITISH COUNCIL

Intra-regional mobility in East Asia

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OVERVIEW

East Asia (EA) has long been one of the UK's largest sources of quality international students, with the UK enjoying more than two decades of steady growth in the number of students from the region. Between 2002-2012, the number of enrolments from East Asia grew at a compound annual growth rate of 6.3 per cent. By 2012, five East Asian countries and territories were among the UK's top 20 sources for international students: mainland China, Malaysia, Hong Kong SAR, Singapore and Thailand. Since 2012, East Asia as a region has consistently accounted for at least a third of all international students enrolled at UK higher education institutions, with the region's share peaking at 37 per cent in 2019.

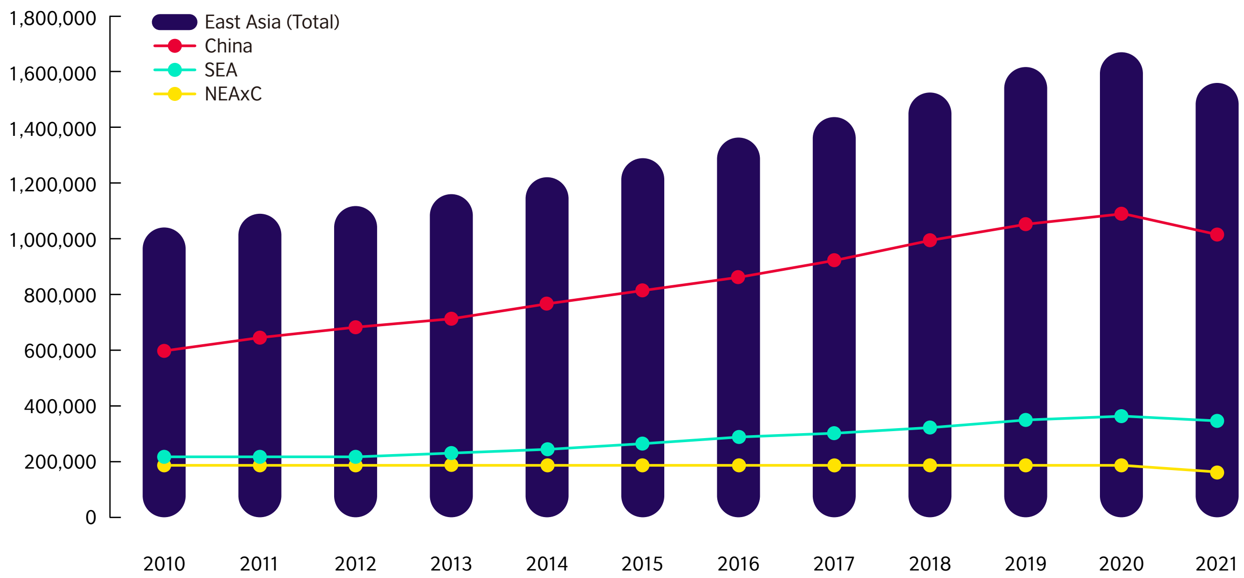
However, a shift in underlying mobility trends from the region started to emerge around 2015/16, with a notable decline in the number of students enrolled in the UK from Malaysia, Singapore and Thailand. Prior to that, between 2002-2012, the number of enrolments from Southeast Asia (SEA) in the UK grew at an annual compound growth rate of 5.5%, but between 2015-2019, growth fell to -3.2% per annum, even before the onset of Covid-19. By 2019, enrolment of SEA students in the UK was 8 per cent or 3,500 lower than in 2015. Enrolments of students from Northeast Asia (excluding China) (NEAxC) have also plateaued since 2015. China almost singlehandedly accounted for all growth in enrolments from East Asia during this period.

Using student mobility data from UNESCO's Institute of Statistics (UIS), this report highlights increased intra-regional mobility of tertiary students within East Asia since 2015/16, which has likely contributed to the slowdown in outbound mobility from most parts of East Asia to the UK. With countries in the region seeking to become regional and international education hubs, internationalisation of higher education ranking high on the agenda, and generous offers of scholarship to attract international students to meet ambitious student targets, intra- regional student mobility within East Asia is expected to grow further.

While the growth in intra-regional mobility in East Asia could depress student mobility to the UK, the UK stands to benefit from increased demand for transnational education (TNE) in the region. Continued investment in the region is key to build upon the UK's reputation as a preferred global education provider in East Asia and to position the UK as an attractive study destination at some point of students' higher education and professional journeys.

Outbound mobility from East Asia

Figure 1: Outbound student mobility from East Asia and sub-regions



Source : UNESCO Institute of Statistics (UIS)

In the decade leading up to the pandemic, the number of tertiary students from East Asia seeking to study overseas grew steadily, driven largely by outbound mobility from China and followed by SEA. Based on estimates by UIS, outbound mobility from East Asia to the whole world grew at a compound annual growth rate of around 4.8 per cent between 2010-2020, with outbound mobility from China and countries in SEA increasing by 6.1 per cent and 5.2 per cent on average per annum respectively against a decline of -0.5 per cent per year from NEAxC[1].

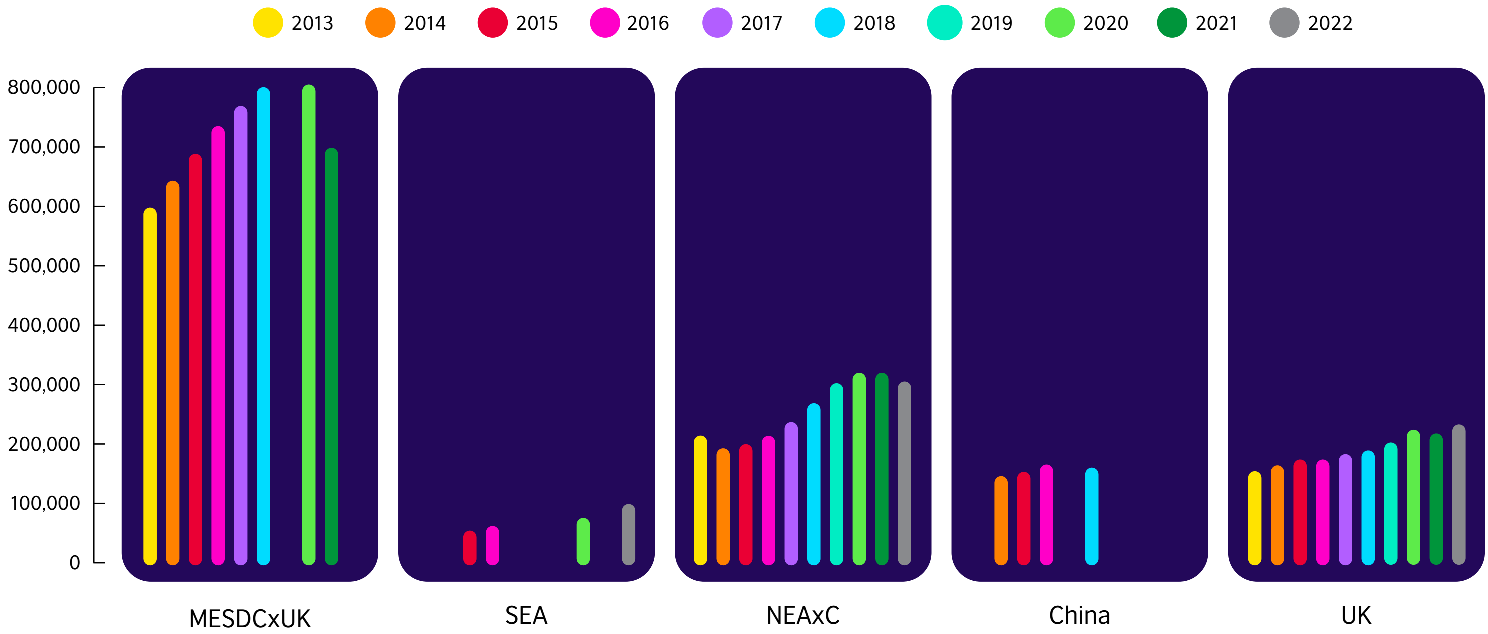
Growth in outbound mobility from East Asia accelerated in the latter part of the decade. By 2020, the number of outbound students from SEA was 25.6 per cent higher than in 2016, with Vietnam and Indonesia driving most of this increase, followed by the Philippines and Myanmar. Outbound mobility from Malaysia and Singapore, however, declined throughout this period. Meanwhile, much of the stagnation in outbound mobility from NEAxC was due to the gradual decline of mobility from South Korea, although student flows from Hong Kong and Japan also plateaued.

1: Outbound mobility refers to the outward movement of students from a certain country to any other country in the world, and includes intra-regional mobility (e.g. movement from country A to country B within the same region).

Inbound student mobility within East Asia

Pre-pandemic trends

Figure 2: Mobility from EA to select regions/group of countries



Source: UIS, China Ministry of Education, Japan Student Services Organization (JASSO)

Note: NEAxC as a destination covers Hong Kong SAR, Japan and South Korea; SEA as a destination covers Malaysia, Thailand and Vietnam; there is no publicly available data for Singapore and Taiwan as destinations, or mainland China post 2018.

Between 2013-2020, more than half of outbound tertiary students from East Asia went on to study in main English-speaking destination countries (MESDCs), but that share is declining. Based on UIS data, the number of tertiary students from East Asia studying in Australia, the US and Canada (MESDCxUK) increased from under 600,000 in 2013 to close to 800,000 in 2020, rising 36 per cent over the period (Figure 2). Meanwhile, the number of tertiary students from East Asia heading to the UK grew 51 per cent over the same period, with student numbers rising to 210,000 in 2020 from 139,000 in 2013. Although the number of outbound students from East Asia who choose to stay within the region is comparatively small, intra-regional mobility grew at a faster pace than enrolments in MESDC markets: intra- regional mobility to Southeast Asia increased by 68 per cent between 2012 and 2020 (2013 data unavailable for SEA as a destination), and to Northeast Asia (excluding China) by 53 per cent over the same period.

Table 1: Growth in inbound students between 2013-2020

Source	Growth between 2013-2020, by destination				
	MESDCxUK	UK	NEAxC	SEA	China
East Asia	36%	51%	53%	68%	
East Asia (ex. China)	7%	15%	170%	50%	4%

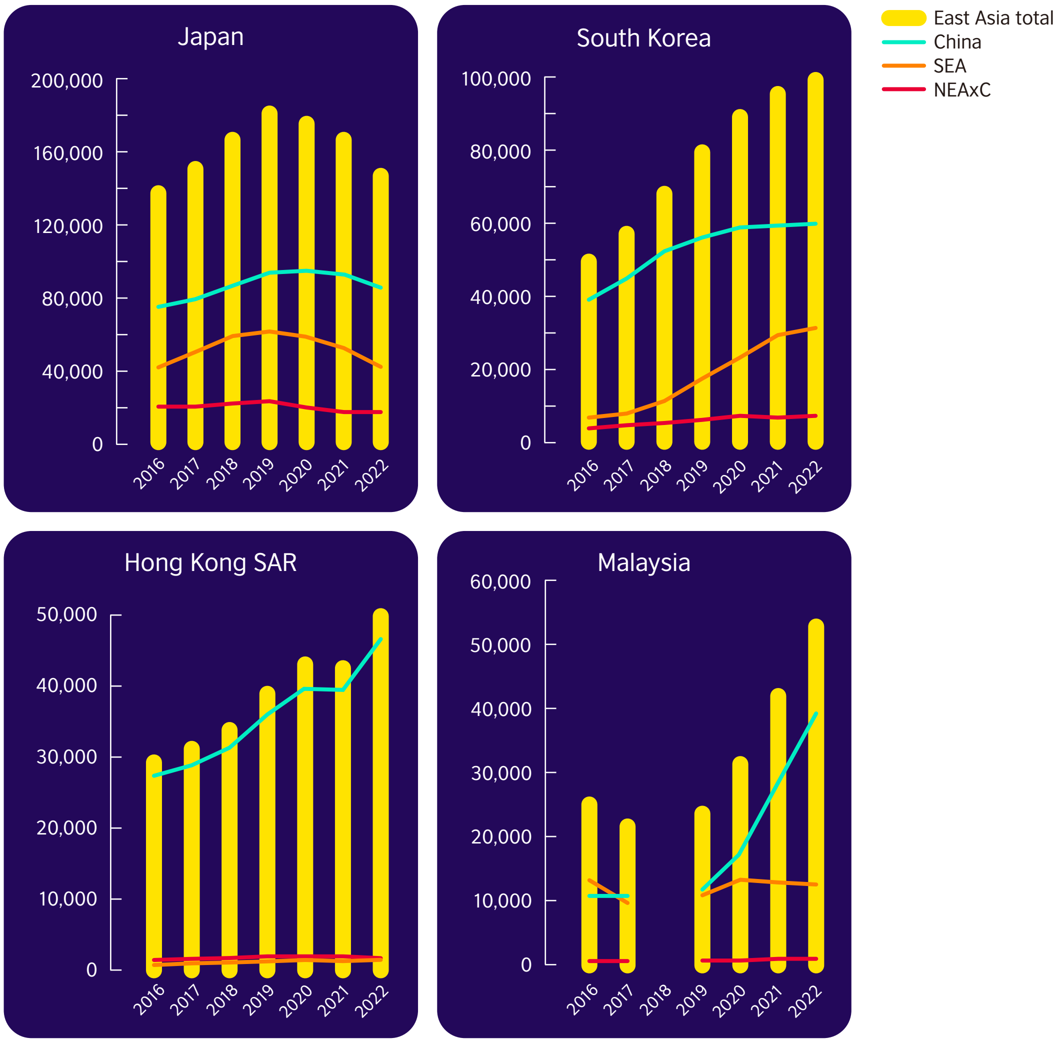
Source: UIS, China Ministry of Education, JASSO

Note: NEAxC as a destination covers Hong Kong SAR, Japan and South Korea; SEA as a destination covers Malaysia, Thailand and Vietnam; growth in inbound students from East Asia (ex China) to China is for the period 2012-2018 for which data is available

During the period 2013- 2020, when China as a source country is taken out of the picture, the growth in the number of tertiary students from East Asia heading to MESDCs is much lower, while mobility within the region is much higher. The growth in outbound mobility from East Asia to major English speaking destination countries, the UK included, can be almost solely attributed to the meteoric rise in enrolments from China. Excluding students from China, the regional picture changes; the number of tertiary students from East Asia (EAxC) studying in MESDCxUK was only 7 per cent higher in 2020 than in 2013, compared to the 36% growth when China is included (Table 1). Student mobility from East Asia ex China to the UK began to decline by 2017. In contrast, mobility of students from EAxC to China and other Northeast Asian countries increased sharply, with numbers more than doubling from 2013 to 2020. There was also a substantial 50 per cent increase in the number of students from EAxC headed to Southeast Asia over this period.

Recent trends
Select EA host countries/territories

Figure 3: Inbound students into select EA markets, by source country/region



Source: UIS, JASSO

2: Data on international students in China is only available up until 2018 from China's Ministry of Education

The top host countries in East Asia are mainland China, Japan, South Korea, Malaysia and Hong Kong. After China, which hosted 140,000 international students from just seven EA countries to China in 2018[2], Japan attracts the second largest number of international students from East Asia, hosting around 150,000 students in 2022, according to data by JASSO. South Korea ranks third with around 99,000 international students from East Asia in 2022. The number of East Asian students enrolled in Malaysia surpassed 50,000 in 2022, exceeding Hong Kong's 49,870 students while those in Thailand and Vietnam numbered 22,000 and 7,300 respectively. In terms of growth, South Korea has outperformed other host countries/territories in East Asia, with the number of enrolments from East Asia more than doubling between 2016-2022. Thailand and Vietnam also recorded double-digit growth rates over this period, albeit from lower bases.

Country Snapshots
Host countries/territories

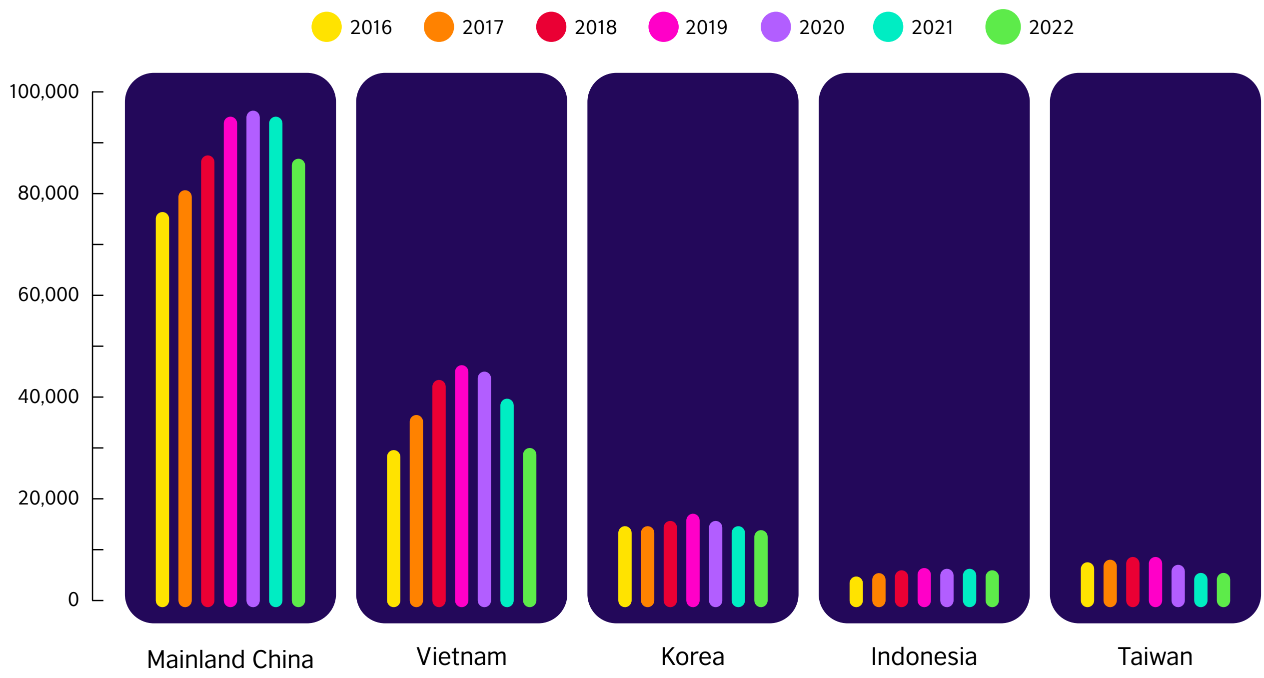
JAPAN

- Total international higher education (HE) student numbers have fallen since the pandemic; in 2022 the total number was 182,000, 20 per cent lower than the 228,000 recorded in 2019.
- The number of EA students in Japan in 2022 was also 19 per cent lower in 2022 than in 2019. Students from EA account for more than 80% of all international higher education enrolments in Japan, with students from China and Vietnam making up the largest proportion (63%) (Figure 4).

Growth targets/incentives

- Japan has set a goal of increasing international student enrolment in the country to 400,000 by 2033, with plans to allow them to stay on to work in the country after they graduate[3]. Full MEXT scholarships are available to undergraduate, postgraduate and research-level students from countries with which Japan has diplomatic relations[4].
- Japan is also focusing on internationalising its higher education system and expanding the number of joint degree programmes in the country from 27 to 50 by 2033, which will boost the attractiveness of Japan as a study destination.

Figure 4: International HE students in Japan: Top 5 EA sending countries/territories



Source: JASSO

3: https://asia.nikkei.com/Spotlight/Japan-immigration/Japan-shoots-for-400-000-foreign-students-by-2033

4: https://says.com/my/news/japan-invites-msians-2025-mext-scholarships

CHINA

- Between 2014-2018, the period for which data is available from China's Ministry of Education, the number of students from Thailand, Indonesia and Malaysia (which collectively make up about 10 per cent of all international students in China) increased by 28 per cent.
- However, enrolments from South Korea, who were the largest group of students in China and accounted for 10 per cent of all international student, fell by 20 per cent over the same period.
- In total, China saw a decline in the number of enrolments from the top 7 sending EA countries (which accounted for 29 per cent of all international students in China) between 2014-2018.

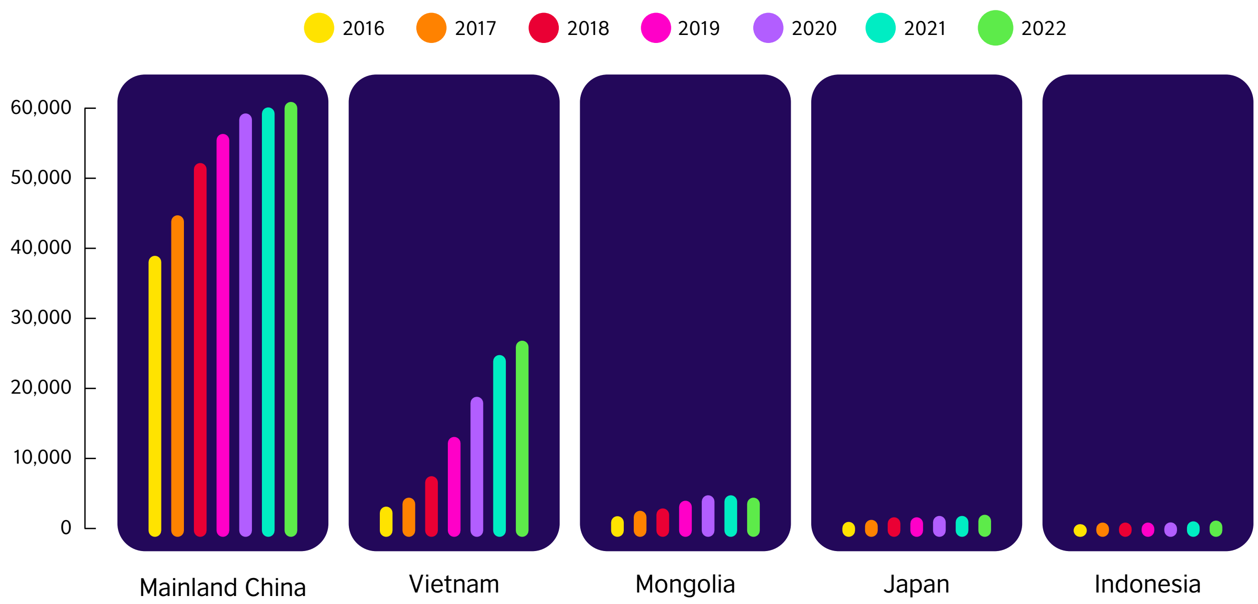
Growth targets/incentives

- International student numbers have yet to rebound following the Covid-19 pandemic[5]. The government has also yet to reveal its goals and ambitions but there are very clear intentions to continue hosting international students in China.
- High youth unemployment and geopolitical tensions are also dampening China's attractiveness as a study destination.

SOUTH KOREA

- International student numbers hit an all-time high in 2022, reaching 205,000 in March 2023, exceeding the government's 200,000 target that was set in 2015.
- Unlike Japan, South Korea recorded positive growth in enrolments of students from East Asia in 2021 and 2022, even amid the pandemic. China and Vietnam are the largest sending countries from East Asia and together account for around 70% of international students in South Korea (Figure 5)

Figure 5: International HE students in South Korea: Top 5 EA sending countries/territories



Source: UIS

5: https://www.scmp.com/news/china/diplomacy/article/3255815/covid-pushed-foreign-students-out-china-will-politics-red-tape-and-poor-job-prospects-keep-them-away

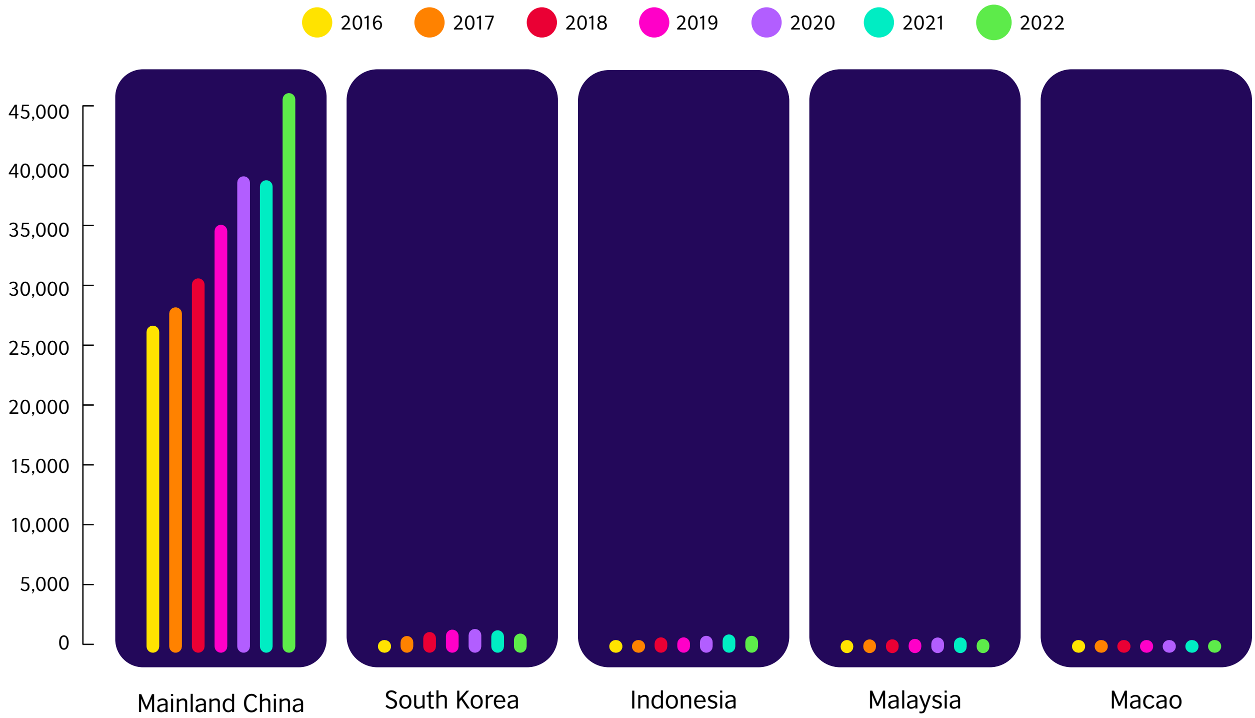
Growth targets/incentives

- South Korea, with its rapidly aging society and declining student population, has set ambitious targets in the Study Korea 300k Project to attract 300,000 international students by 2027 and position the country as one of the world's Top10 study abroad destinations by then[6].
- Various incentives to achieve this target are in the works, including increasing the number of government scholarships (Global Korea Scholarships), fast-tracking permanent residency applications, and lowering language requirements.
- In May 2023, it was also announced that a new international student support division in the Ministry of Education will be launched, which will partner with local universities to create new programmes and ease visa restrictions for international students.

Hong Kong SAR

- The number of students from other parts of East Asia in Hong Kong SAR reached almost 50,000 in 2022, with the vast majority (94 per cent) coming from mainland China (Figure 6).
- With the exception of China, enrolments from other parts of East Asia have fallen below pre-pandemic levels, including South Korea, which remains the second-largest source of inbound student to Hong Kong from East Asia.

Figure 6: International HE students in Hong Kong SAR: Top 5 EA sending countries/territories



Source: UIS

6: https://monitor.icef.com/2023/08/south-korea-aims-to-attract-300000-international-students-by-2027/

Growth targets/incentives

- As part of efforts to stem declining fertility rates and outbound migration due in part to controversial national security legislation, Hong Kong SAR aims to double the intake of foreign students at public universities funded by the University Grants Committee (UGC). Starting in the 2024/25 academic year, the enrolment cap for foreign students will be raised from 20 per cent to 40 per cent, which will allow UGCs to admit up to 6,000 non-local undergraduates[7].

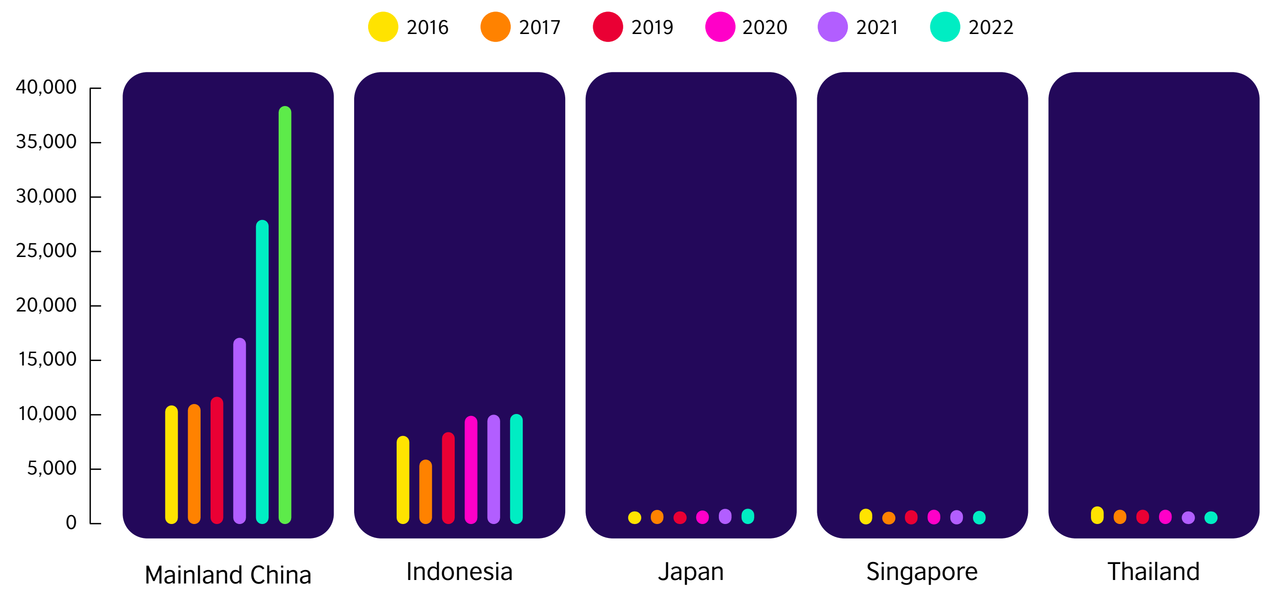
Malaysia

- Inbound mobility from other parts of East Asia to Malaysia surged by 31 per cent per year between 2019 and 2022. This compares with single-digit growth rates in the prior decade.
- Much of this acceleration in growth rates was driven by students from China; in contrast, enrolments from most other NEA countries and SEA have slowed or even declined since 2021, with the exception of Japan and Vietnam which remain growth markets for Malaysia (Figure 7).

Growth targets/incentives

- Malaysia aims to grow international student enrolments to 250,000 by 2025, although this figure also includes students at school levels.
- Beginning 1 December 2023, international students from 23 countries who have graduated from any higher education institution in Malaysia are eligible for the Graduate Social Visit Pass, which entitles foreign graduates to study, travel or work part-time during the year[8].

Figure 7: International HE students in Malaysia: Top 5 EA sending countries/territories



Source: UIS

7: https://monitor.icef.com/2023/07/hong-kong-poised-to-double-intake-of-foreign-students/

8: https://monitor.icef.com/2024/02/malaysia-opens-new-post-study-visa-option-for-degree-graduates/

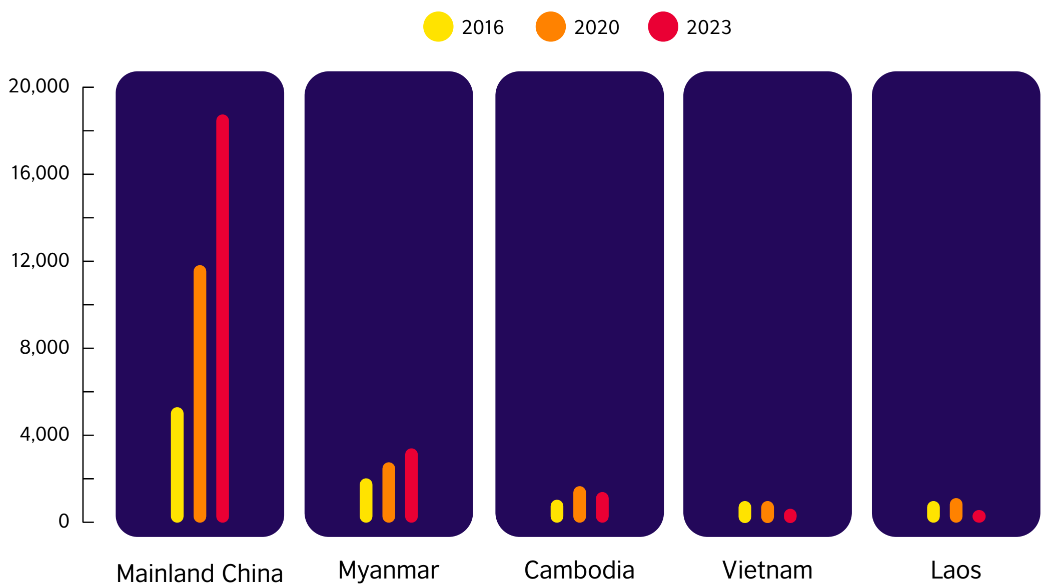
Thailand

- Enrolments of students from other parts of East Asia in Thailand have taken off since 2020; by 2023, inbound mobility from East Asia to Thailand exceeded 25,000, which was 34 per cent higher than in 2019.
- China and Myanmar are the two largest source countries from East Asia to Thailand, followed by Cambodia, Vietnam and Laos (Figure 8).

Growth targets/incentives

- Thailand is encouraging the establishment of branch campuses of high performing foreign institutions in Thailand by simplifying the approval process for branch campuses and providing various incentives.
- Increased interest in transnational education by the Thai government will likely spill over into other modes of TNE partnerships but success of TNE in Thailand will likely depend on growth in student demands which at the moment, remains small.

Figure 8: International HE students in Thailand: Top 5 EA sending countries/territories



Source: UIS

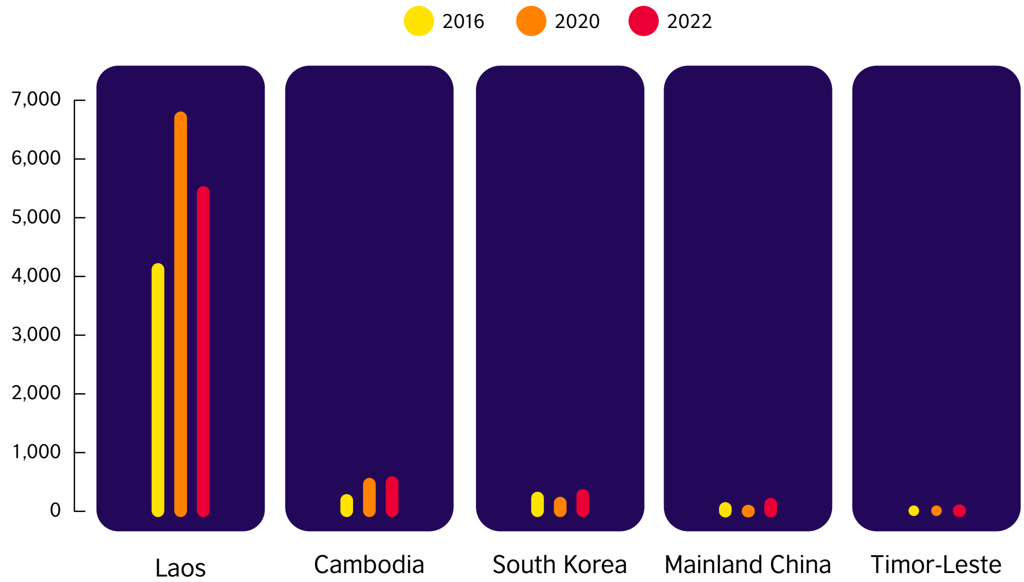
Vietnam

- Within East Asia, Vietnam is a popular study destination for students from Laos and Cambodia. Between 2016-2020, inbound mobility from these two countries to Vietnam grew by more than 50 per cent to around 7,500 before declining to 6,300 after the pandemic (Figure 9).

Growth targets/incentives

- Vietnam's rapidly growing economy, its large and growing population base, as well as improved educational performance and outcomes make it a growth market for international schools and transnational education, particularly for UK and Australian institutions.

Figure 9: International HE students in Vietnam: Top 5 EA sending countries/territories



Source: UIS

Taiwan & Singapore

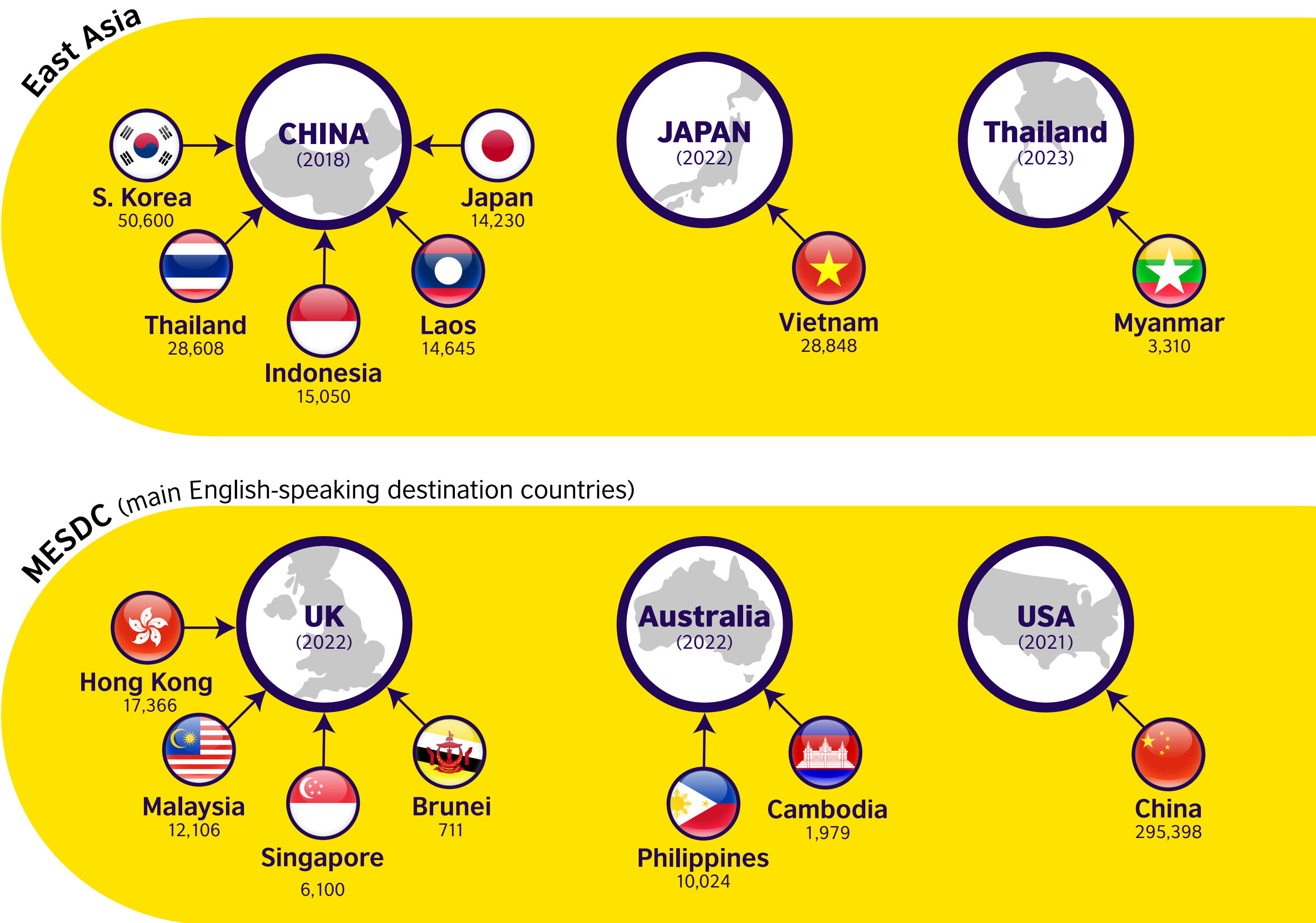
- Singapore and Taiwan are both major education hubs in East Asia. There is a lack of consistent data on the number of international students studying in Singapore and Taiwan, but estimates indicate there were close to 80,000 foreign students studying in Singapore[9] at the beginning of 2023 and more than 115,000 in Taiwan, the majority of whom are expected to be from East Asia.
- Singapore continues to attract students due to its superior education standards, globally competitive higher education institutions, and high standards of living. Tuition grants for selected full-time diploma and undergraduate courses are offered to eligible international students if they agree to stay on to work in Singapore for a minimum of three years upon graduation. International students may also be eligible to apply for study loans.
- Taiwan embarked on a New Southbound Policy in 2016 which emphasized closer economic and cultural ties between Taiwan and 18 other education markets in Asia. This policy contributed to strong growth in inbound students from regional countries; after China, Malaysia was the second largest sending market in 2018, followed by Vietnam and Indonesia. The policy remains a priority; in 2023, Taiwan's Ministry of Education (MOE) and the International Development and Cooperation Fund (Taiwan ICDF) awarded scholarships to 70 Filipino students to study in Taiwan[10].
- Taiwan has set a recruitment target of attracting 320,000 international students by 2030 and wants the number of students who stay on after graduation to exceed 210,000. To meet these targets, Taiwan's MOE has announced plans to set up overseas offices in key regional markets including Vietnam, Indonesia and the Philippines.

9: https://www.thinkchina.sg/society/singapore-becoming-preferred-study-destination-affluent-asian-families
10: https://www.manilatimes.net/2023/08/03/campus-press/70-ph-scholars-bound-for-taiwan-heis/1903697

Summary Snapshot
Key intra-regional source countries/territories

- **China** has large numbers of students studying in other Northeast Asian countries/territories, namely Japan, South Korea and Hong Kong SAR (NEAxC). The number of Chinese students in NEAxC exceeds those studying in the UK.
- **Indonesia, Japan, South Korea** and **Thailand** send more students to China than to any English speaking country.
- More students from **Vietnam** study in Japan than in any English-speaking country.
- Students from **Laos** prefer to study in China; those from **Myanmar** prefer Japan.
- Students from **Cambodia** increasingly prefer to study in Australia, which overtook Thailand as the top study destination for Cambodian students.
- Students from **Hong Kong SAR, Malaysia, Singapore** and **Brunei** have a clear preference for the UK above any host country in East Asia.

Figure 10: Top host country for EA source markets

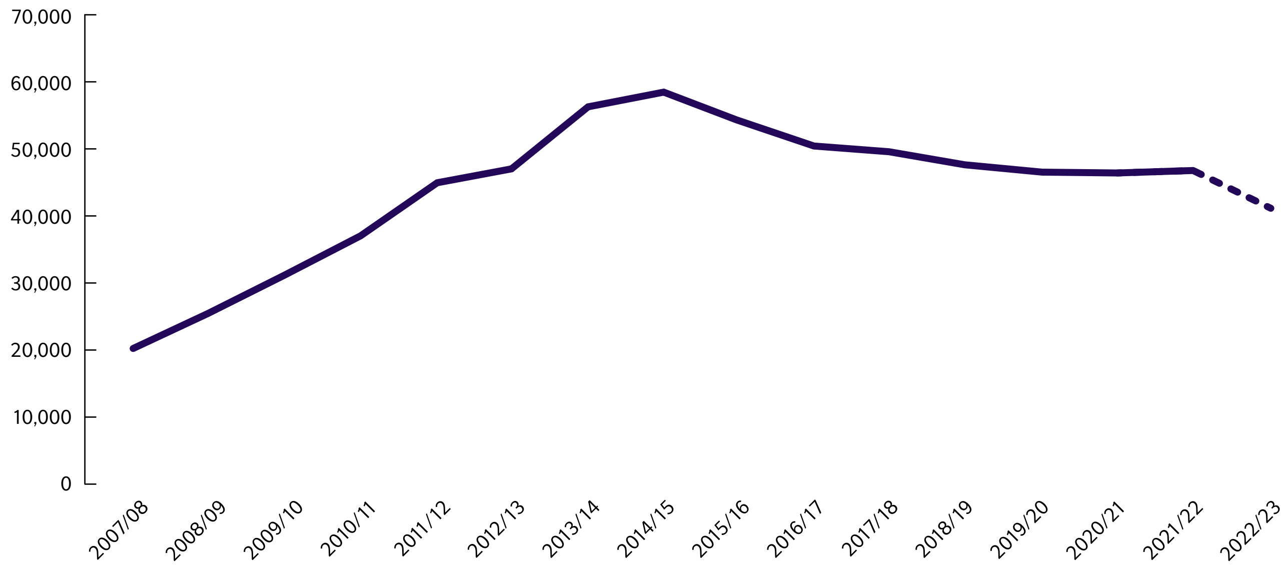


Source: UIS, JASSO, China's Ministry of Education

Note: Countries in the circle represent host countries, while flags denote source countries

Country in Focus Malaysia

Figure 11: Enrolment in UK TNE in Malaysia

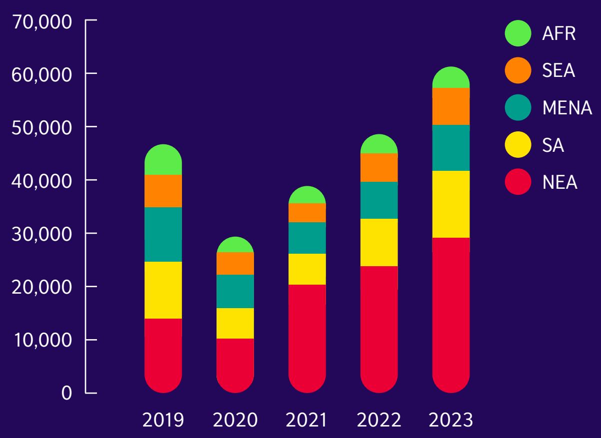


Source: Higher Education Statistics Agency (HESA)
Note: 2022/23 data is based on initial headline numbers from HESA and may differ from the finalised number

Over the last 25 years, Malaysia has developed into a regional education hub with transnational education playing a crucial role. The earliest TNE programmes, based on matriculation, were franchise programmes established in the 1980s with Australian higher education institutions. The 1990s was a period of growth for other forms of TNE partnerships, particularly twinning programmes, and then from the late nineties to around 2015, the local TNE market moved toward branch campuses – first the University of Monash Malaysia in 1998 and then the University of Nottingham Malaysia in 2000. The 2000s was a period in which UK TNE in Malaysia grew rapidly; in the seven years between 2007-2014, the number of students enrolled in UK TNE programmes in Malaysia almost tripled to 59,100 from 20,525 (Figure 11). During this time, more branch campuses were established and by 2015, there were 10 branch campuses operating in Malaysia.

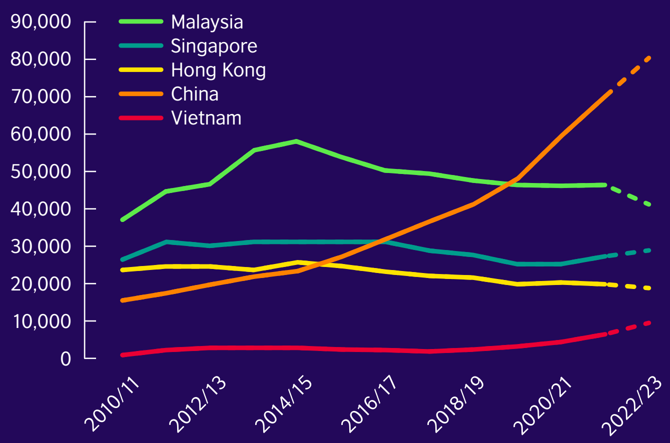
Malaysia's long-standing education ties with the UK, and the widespread use of English, including in business, have made the country particularly attractive for international students seeking to gain a UK qualification at a higher education institution in Malaysia. In addition, Malaysia's strategic location, ease of doing business, political stability, relatively affordable cost of living, and rich geography and culture-- coupled with the opportunity for students to study at private or public universities with improving global rankings-- have made Malaysia a desirable study destination for international students, particularly those from Southeast Asia, South Asia, the Middle East and Africa.

Figure 12: International student applications in Malaysia (by region)



Source: Education Malaysia Global Services

Figure 13: Enrolment in UK TNE in select EA countries

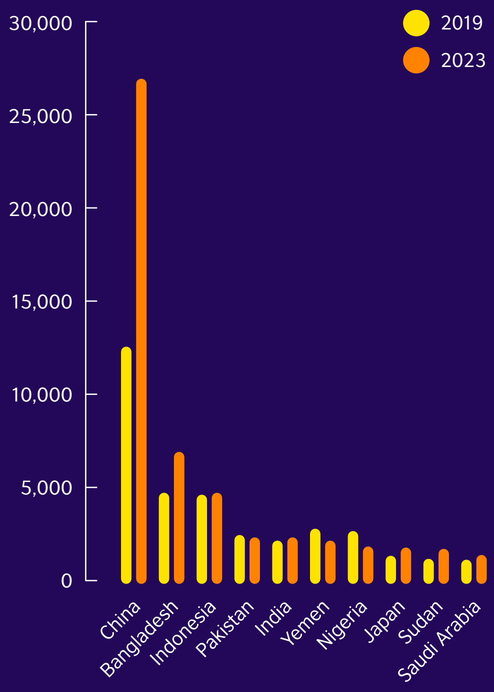


Source: Higher Education Statistics Agency (HESA)

Note: 2022/23 data is based on initial headline numbers from HESA and may differ from the finalised number

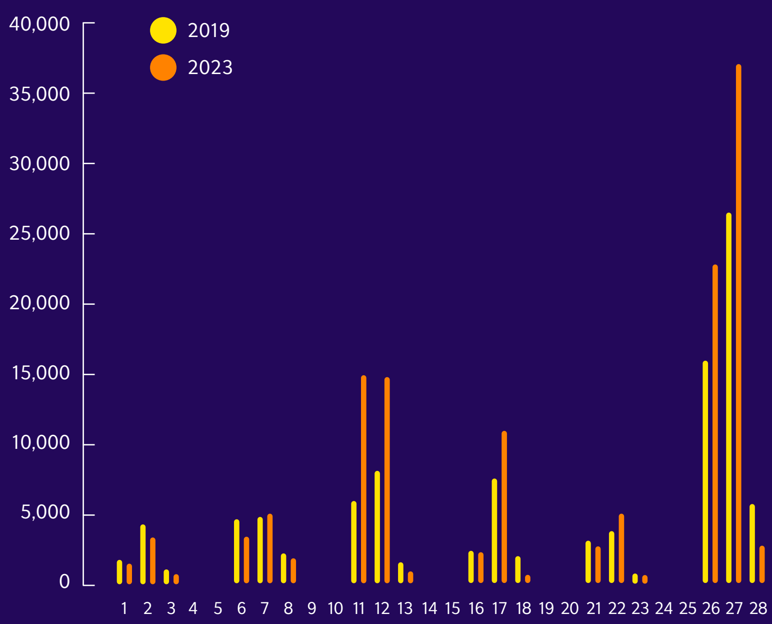
Malaysia saw a positive turnaround in its position as an international study destination post-pandemic, but competition is rising. After inbound mobility to Malaysia declined between 2017-2019, during which China experienced strong growth in UK TNE enrolments and overtook Malaysia as the largest UK TNE provider in East Asia in 2019/20, the number of international students applying to Malaysia rebounded and increased substantially between 2021-2023 (Figure 12). With many borders closed to international study during the pandemic, such as in Australia, and with many household incomes negatively affected by prolonged lockdowns, more domestic students and international students from the region opted to enrol closer to home. However, this trend appeared to go in reverse in 2022/23 due to rising competition from other education hubs in Northeast Asia in particular. That year, Malaysia experienced an 11 per cent decline in enrolment of students in UK TNE programmes, while China experienced 14 per cent growth, according to preliminary HESA data (Figure 13).

Figure 14: Top 10 Source Countries of International Students in Malaysia



Source: Education Malaysia Global Services

Figure 15: International student applicants by institution

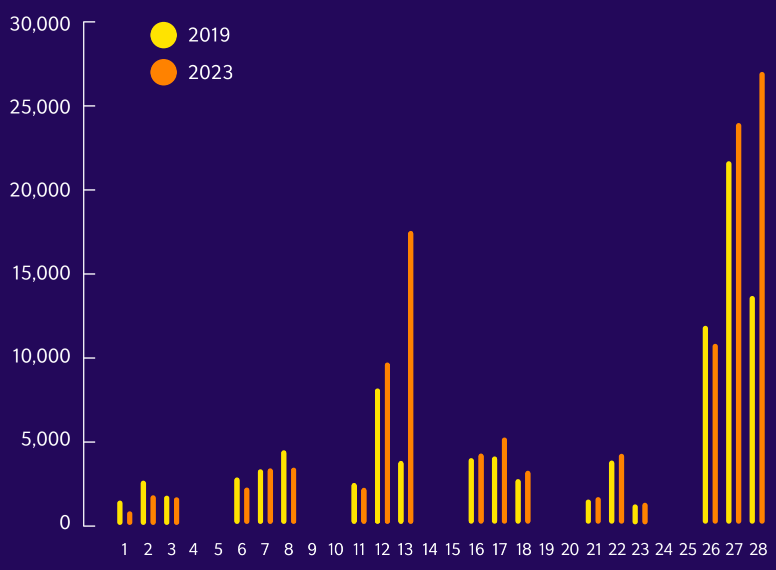


Source: Education Malaysia Global Services

Much of the growth in international student applicants in Malaysia has been led by China in recent years. In 2023, the number of applications from China (26,600) was 80 per cent higher than it was in 2019, and accounted for 43 per cent of total applications. Bangladesh was the next largest source country of international student applicants, followed by Indonesia and Pakistan (Figure 14). In total, the top 10 source countries accounted for 79 per cent of total applicants in Malaysia in 2023 compared to 68 per cent in 2019.

More international students are studying at private higher education institutions (HEIs) in Malaysia, but applications to public universities are also growing. In 2023, around 60% of international students applied to study at private HEIs institutions (including private universities, branch campuses and university colleges), while 36% applied to study at Malaysia's public universities. A small percentage (4%) applied to study at language and skills centres. Over the last five years, students from NEA have shown increasing interest in studying at public universities, while students from MENA, SA and SEA are generally preferring to study at private HEIs (Figure 15). Just in the last three years, international student applications from China to public universities in Malaysia have multiplied by a factor of four, with 50% more applicants to public universities than to private HEIs. Much of the growth in applications from China to public universities are for degree and Master's level courses with business and administration being the most popular subject area at all levels (26% of all applications).

Figure 16: International student applicants by level of study



Source: Education Malaysia Global Services

The rise in interest in Malaysian public universities has largely been driven by increased demand for postgraduate degrees. Malaysia is increasingly attracting international students at higher levels of education, particularly degree and post-graduate level education. By 2023, the number of postgraduate applicants had almost doubled to 26,800 from 2019 and now form the largest group of international student applicants in Malaysia (Figure 16). 58 per cent of international postgraduate students are pursuing their Master's degree while 42 per cent are pursuing their PhDs in Malaysia. Much of the growth in postgraduate students at both Master's and PhD levels has been driven by students from Northeast Asia, who accounted for 67 per cent of all international Master's-level applicants and 62 per cent of all PhD-level applicants in 2023, signficantly higher than the 30 per cent and 25 per cent respectively in 2019.

University rankings are becoming an important deciding factor for international students from East Asia. The majority of international students applying to study at public universities in Malaysia (77%) are concentrated in the top 5 public universities, which are all ranked in the 2025 QS World University Rankings Top 200. International student enrolments at the highest ranked private higher institution (2024 QS World University Rankings Top 300) was also 2.5 times greater in 2023 than in 2019. But private HEIs in general have a much lower concentration of international students, with the top 5 private higher education institutions in Malaysia accounting for only 37% of all international students applying to private HEIs. As most TNE programmes are offered through private HEIs in Malaysia, the rankings of the degree-awarding partner (the UK or Australian higher education institution) hold greater importance.

The outlook for Malaysia as an international study destination is positive, with policy support for further strengthening higher education institutions and growing international student enrolments. Malaysia's higher education sector has come out of the pandemic stronger than before with international students returning and institutions becoming more competitive. In 2019, there were two Malaysian higher education institutions in the QS World University Rankings Top 200 and seven in the Top 600; by 2024 that figure had risen to five and 13 respectively. Backed by the government's emphasis on the need to develop human capital with the ability to navigate an increasingly digitalised and technologically advanced world, Malaysian universities are also pushed to internationalise and to innovate. In 2023, the University of Technology Malaysia established the country's first Faculty of Artificial Intelligence, with the help of government funding. Meanwhile, TNE partnerships and collaborations are well established and have the potential to continue attracting international students as long as universities and their partners proactively innovate and redesign programmes to meet students' evolving demands, as well as advance their partnerships into areas of research and innovation.

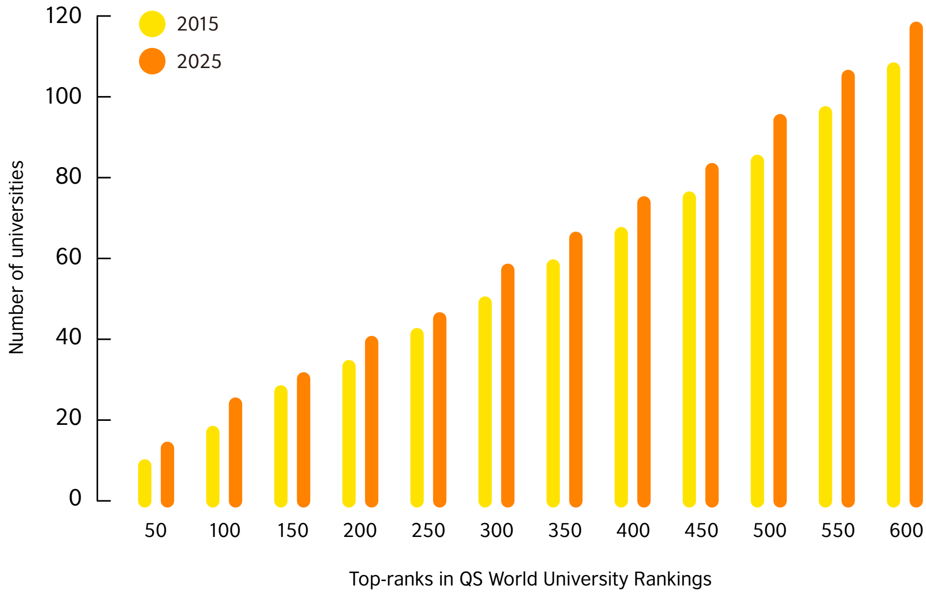
Malaysia's macro environment is also supporting the country's growth as a regional education hub. Malaysia's foreign policy safeguards its position as a welcoming destination for investments and people, more so in a time of heightened geopolitical tensions worldwide. The government's drive to boost inward foreign investment is bearing fruit and is expected to lead to growth in business and employment over the medium term, thereby providing more opportunities for universities to enhance industry engagement and collaboration. With employability at the forefront of students' priorities, increased opportunities for internships and training with global companies will boost Malaysia's position as a study destination. Elsewhere, with safety remaining a key concern of students, Malaysia's balanced approach to both the East and West, as well as its unique melting pot of diverse races and cultures, will make it a more attractive education hub.

Rising competition from other regional education hubs will pose a challenge to growing international student enrolments at Malaysian higher education institutions. As countries in Northeast Asia continue to internationalise their higher education sectors and implement reforms to attract more international students, the higher education sector in East Asia is becoming more competitive. In recent years, Malaysia has been able to attract greater numbers of students from Northeast Asia, who have contributed to the bulk of the growth in overall international student applications. But sustained growth amid rising competition will require increased efforts in quality assurance to ensure that the education offer of Malaysian HEIs remains on par with other regional education hubs, especially for quality-conscious students from East Asia. Otherwise, any short-term gains could quickly erode over the medium term as international students shift toward other higher-quality education providers in nearby countries. In addition, Malaysian HEIs also need to prioritise attracting domestic students amid declining tertiary enrolment rates in the country.

The long-standing relationship between the UK and Malaysia should be preserved and enhanced to bring mutual benefit to both countries, not least in education. Strong UK-Malaysia partnerships in education have brought immense benefits to both countries. Malaysia is the UK's third largest TNE market globally while the UK is a market leader in providing TNE in Malaysia. Both sides stand to gain from continued collaboration in knowledge transfer, student exchange and quality assurance, even as Malaysia embarks on a new phase in bringing Malaysian institutions overseas. This will necessarily require Malaysian HEIs to further strengthen their teaching and research quality to build up the country's reputation as a global education provider, beyond just being an education hub.

Outlook for HE in East Asia and Implications for the UK

Figure 17: Number of EA HEIs included among top-ranked universities in QS rankings



Intra-regional mobility within East Asia has increased significantly in the last 10 years. Established TNE collaborations in China, Hong Kong, Singapore and Malaysia, improvements in global rankings of domestic HEIs, competitive fees, and lower cost of living in East Asian countries compared to MESDCs have all increased the attractiveness of East Asia as an international study destination for students within the region. In 2024, for example, there were 23 EA universities in the QS Top 100 Universities-- a 35% increase from 2015-- and 129 EA universities in the Top 600 compared to only 107 in 2015 (Figure 17)

Governments are increasingly supporting the internationalisation of higher education in more EA countries and are offering scholarships to attract greater numbers of international students. The need to shore up university enrolments amid declining youth populations, as well as growing demand for skilled workers, are driving governments in East Asia to develop policies to attract international students to study and work in their countries after graduation. Japan is now keener than ever to internationalise the country's universities and expand international education partnerships in higher education. Meanwhile, smaller markets such as Vietnam and Thailand have aspirations to become regional higher education hubs and have revamped their policies and guidelines to support the establishment of branch campuses in their countries.

Table 2: Universities in the Times Higher Education Top 500

	2016	2017	2018	2019	2020	2021	2022	2023	2024
China	11	12	12	14	17	22	24	27	31
South Korea	11	11	11	10	11	10	10	10	13
Japan	11	12	10	13	13	10	8	6	10
Taiwan	7	5	4	3	3	5	5	4	7
Hong Kong	6	6	6	6	6	6	6	5	6
Malaysia	1	0	1	1	1	1	1	3	6
Singapore	2	2	2	2	2	2	2	2	2
East Asia-Key markets	49	48	46	49	53	56	56	57	75

With key demand-side factors also working in East Asia's favour over the near to medium term, intra-regional mobility will likely continue to grow over the next 5-10 years. In addition to supply side factors working to raise the quality and provision of higher education in East Asia, some parents and students are prioritising proximity to home more since the pandemic. Rising inflation post pandemic and its impact on the cost of living domestically and overseas, as well as the impact of higher global interest rates on local currencies, have also weighed on the ability of some students to afford studying in pricier MESDCs in particular.

While the growth in intra-regional mobility in East Asia could negatively impact student mobility to the UK, the country stands to benefit from continued growth in TNE in the region. Continued investment in East Asia is key to upholding the UK's reputation as a preferred global education provider in the region and to position the UK as an attractive study destination at some point of students' higher education and professional journey, be it sooner or later. New and innovative partnerships could attract these students to the UK part way through their studies or in the next phase of their studies, complementing their education in the region and contributing to the formation of truly global citizens.

Questions
or
Comments?

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