Higher Ed Summit: Asia Pacific 2026

Insights pack

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QS Higher Ed Summit: APAC 2026

The **QS Higher Ed Summit: APAC 2026** convenes university leaders, industry experts and government officials in **Bali, Indonesia** on **3–5 November 2026**. This year's Summit will foster transformative discussions on how the Asia Pacific region can leverage its rise in the global higher education market to lead the future of the sector in internationalisation, workforce readiness and cross-border collaboration guided by gratitude, responsibility and shared prosperity.

This Insights Pack explores complementary insights on the topics and themes explored across the Forum, in panel discussions, roundtables, workshops and presentations.

At QS, our trusted higher education data powers rankings, insights, and strategic planning worldwide, enabling university partners to take a data-driven approach with billions of data points generated through our global network of employers, academics and prospective students.

Key insights and data points

- Asia Pacific's fastest growing sectors such as health and technology present a major opportunity for institutions to align talent development with industry demand, which includes human skills like critical thinking, problem-solving, as well as communication
- With regional mobility gathering momentum, Asia's next growth phase will be shaped by institutions that combine scale, affordability, employability and student experience
- As global student mobility shifts beyond traditional destinations, ASEAN is increasingly positioned to benefit by combining strong graduate outcomes and regional accessibility
- The rapid adoption of AI across higher education, especially within APAC, highlights a growing need for institutional capability frameworks that can guide decision-making, strengthen governance and align AI initiatives with strategic goals
- Asian universities are producing increasingly impactful research, but expanding international research networks will be critical to unlocking the region's full research potential
- With nearly one in six of the world's top 100 MBA schools now based in Asia, the region is emerging as a major force in shaping the future of business education

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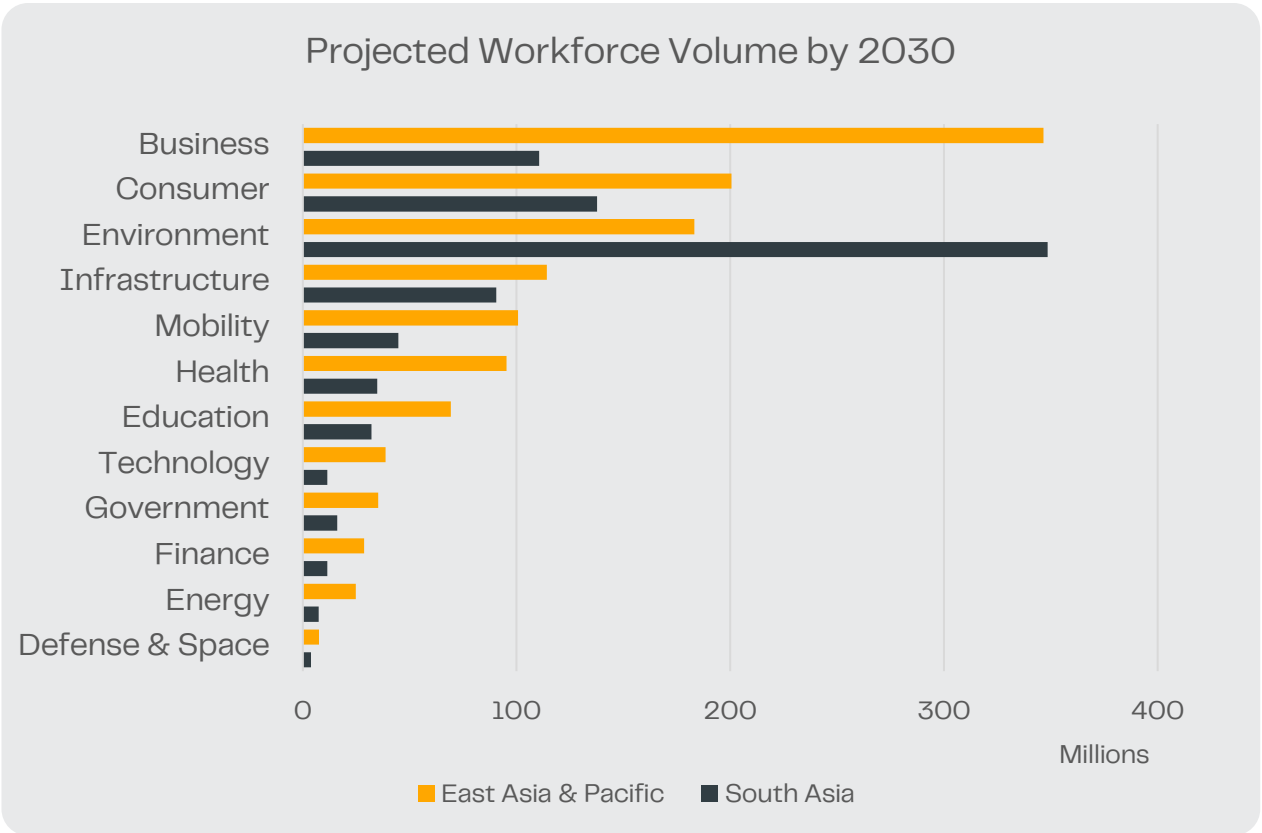
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The Skills Advantage: Preparing Asia Pacific for the Next Economy

By 2030, workforce expansion across Asia Pacific is expected to concentrate in a handful of high-growth sectors, signalling where the region's next economy is taking shape.

East Asia & Pacific is projected to see the strongest growth in Business (almost 350 million in workforce volume), while South Asia is led by Infrastructure (~350M).

Continued AI-driven disruption and augmentation will reshape skill requirements across sectors, creating an imperative for higher education institutions to align learning pathways with evolving industry needs.

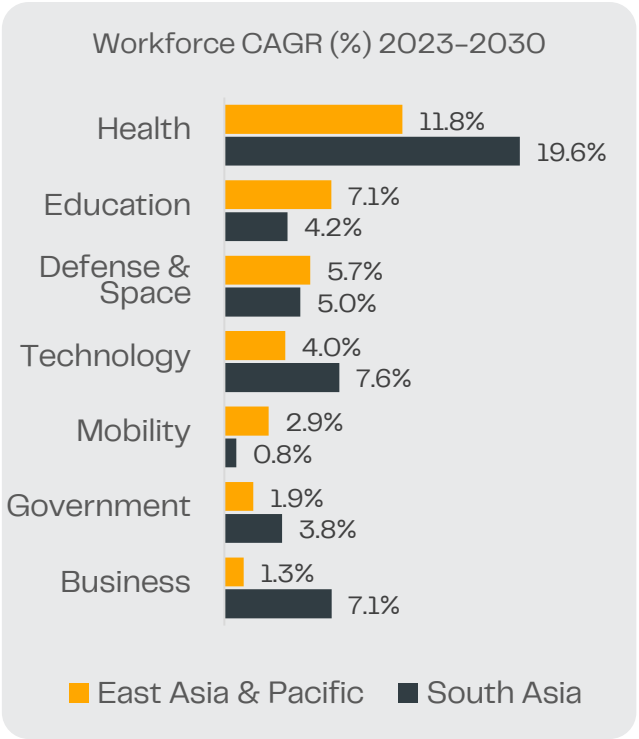


Source: QS Labour Market Intelligence

Workforce CAGR highlights where talent demand is expanding rapidly, offering an early indicator of emerging skill priorities and future labour market opportunities.

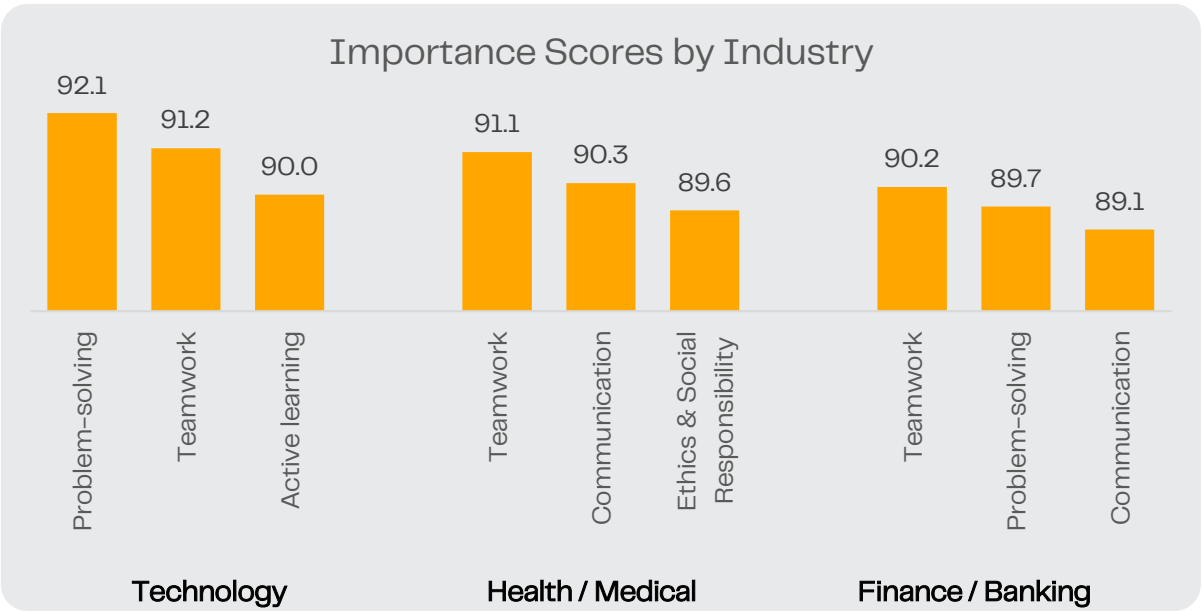
By 2030, the **Health** sector is projected to be the fastest-growing workforce sector in both East Asia & Pacific (11.8%) and South Asia (19.6%).

For East Asia & Pacific subregion, **Education** (7.1% CAGR) is projected to emerge as the second-biggest sector for talent demand, while **Technology** (7.6%) is ranked second for South Asia.



Source: QS Labour Market Intelligence

Employers across these sectors are increasingly prioritising a common set of transferable skills. According to the QS Global Employer Survey, **teamwork**, **problem-solving** and **communication** skills emerge as recurring priorities across Technology, Health/Medical and Finance/Banking sectors. **Active learning** is also important for employers within the technology space while **Ethics & Social Responsibility** is paramount among those in the health/medical field.

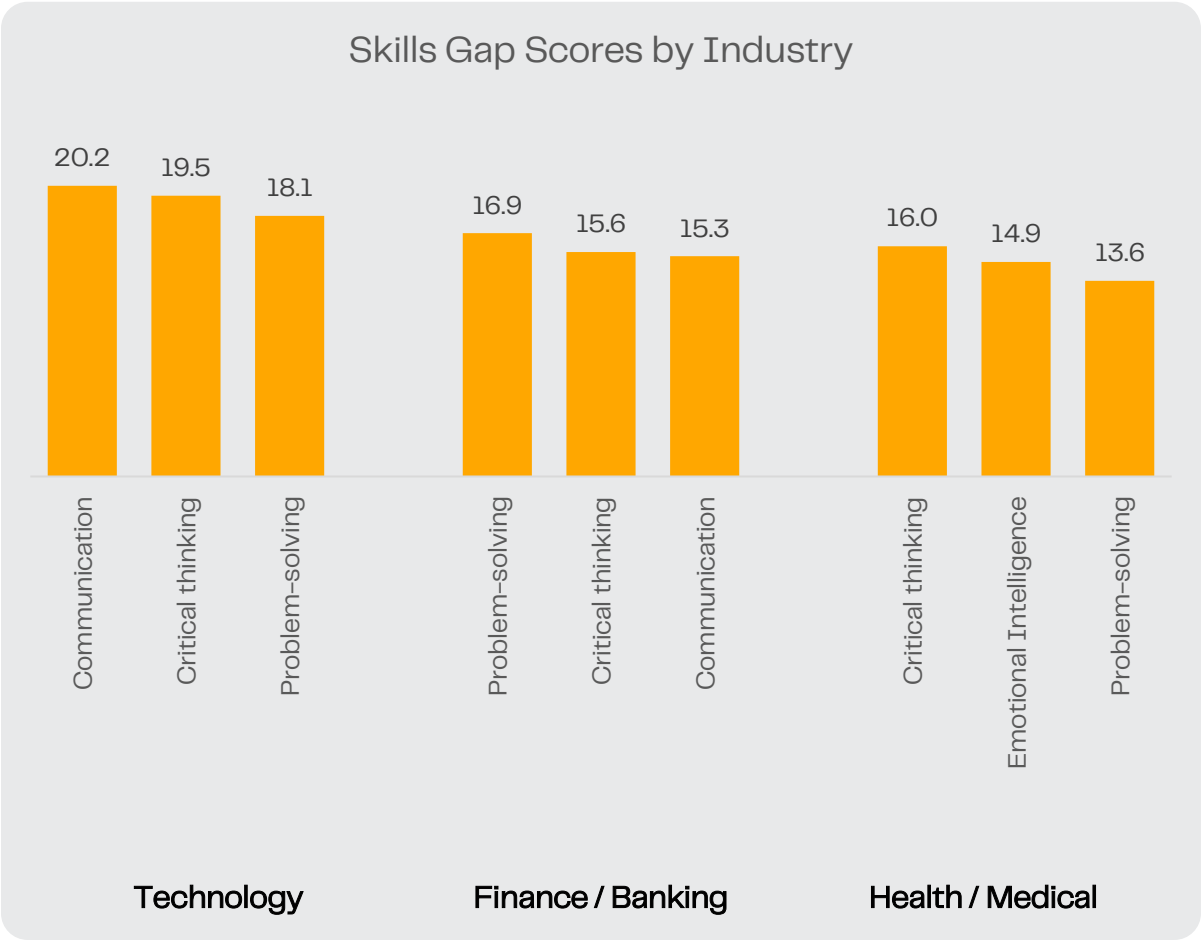


Source: QS Global Employer Survey 2026

The two biggest skills gaps across the technology, finance/banking and health/medical industries are critical thinking and problem-solving, with communication also being featured prominently. This suggests that employers are increasingly challenged not by technical expertise alone, but by graduates' ability to analyse complex problems and collaborate effectively. As AI automates routine tasks, these higher-order cognitive and interpersonal skills are becoming essential especially in a high-performing team.

Among the sectors, technology demonstrates the most immediate upskilling imperative. The skill with the widest gap, communication (20.2), exceeds the leading gap scores of the other two industries, as well as the global average.

For higher education institutions, the need to develop individuals who can think critically, solve problems and communicate effectively across diverse contexts is clear.



Source: QS Global Employer Survey 2026

Indonesia's Skill Advantage and Gaps

Indonesia demonstrates a relatively competitive skills profile within Asia Pacific, particularly in teamwork, problem-solving and communication. While it trails Thailand, India and China in these areas, the country performs better than the global average in seven of the ten most in-demand skills, providing a strong foundation for future workforce development.

However, important gaps remain in areas such as emotional intelligence (18.6), sustainability mindset (13.9) and ethics & social responsibility (12.6), where all three's gap scores exceed the global benchmark. This reinforces the growing demand for graduates who can complement technical expertise with human-centred and values-driven skills.

Strengthening the development of emotional intelligence, sustainability awareness and ethical decision-making, while continuing to improve foundational skills such as problem-solving and communication is key.



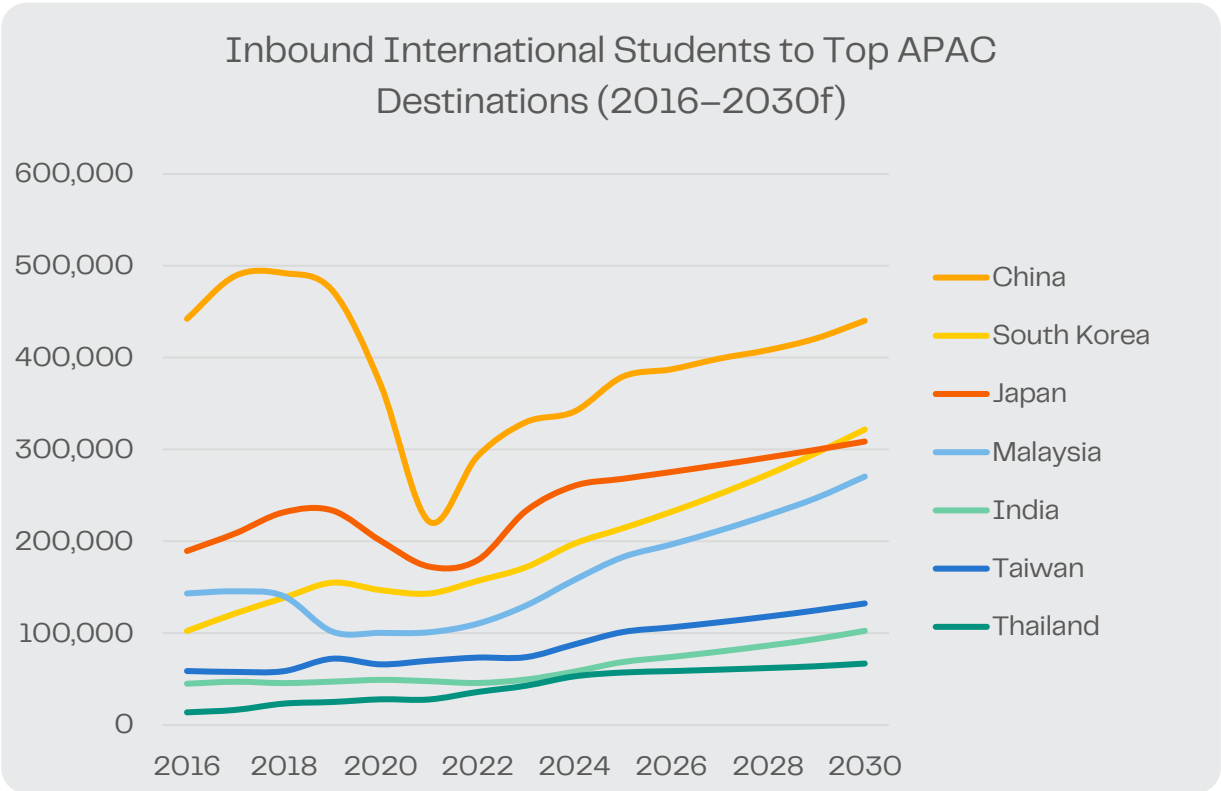
Source: QS Global Employer Survey 2026

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The New Recruitment Map: Where Will Asia Find Its Next Students?

The geography of global student mobility is shifting. As enrolment growth softens across the US, UK, Canada and Australia, a new recruitment map is emerging across Asia. The region is projected to attract nearly 2.3 million inbound students by 2030, anchored by China's scale, South Korea's consistent expansion, and Thailand's rapid growth trajectory. Alongside Malaysia, Japan, Taiwan and India, these markets are broadening the competitive landscape for international education. For higher education leaders and policymakers, future recruitment success will increasingly depend on positioning within Asia's fast-growing and increasingly influential student hubs.



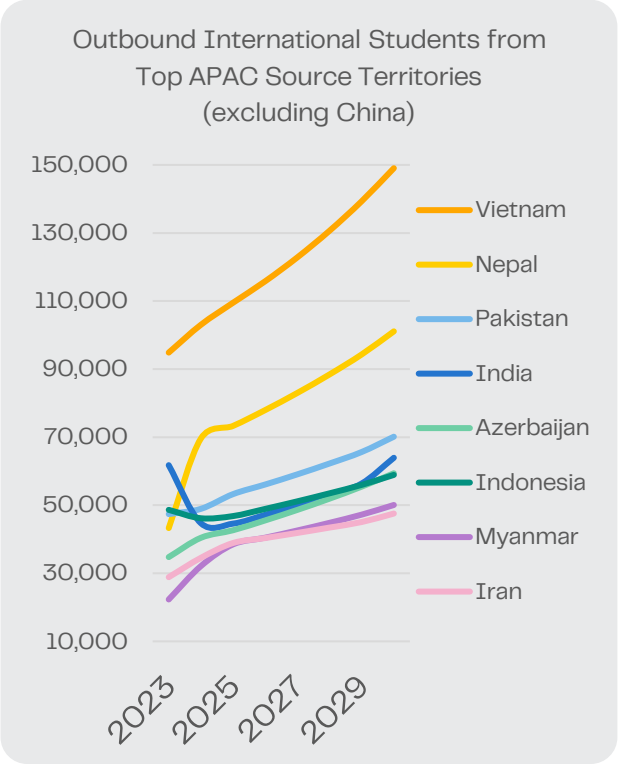
Source: QS Global Student Flows

While China remains the biggest source market, with a projected 470,000 students by 2030, other markets particularly in Southeast Asia as well as South Asia emerge as the region's top source territories.

Vietnam stands out as the most stable source market with the projected 150,000 students by 2030, the second biggest behind China. Nepal is forecast to record the strongest growth by 2030 with 12.9% CAGR since 2023. This is followed by Myanmar.

India remains significant. While the country's total growth is low compared to Pakistan's 48%, it is one of the more stable source markets.

All of this indicates that Asia's future mobility landscape will be shaped by a combination of scale, growth and stability and institutions' strategies should reflect that.



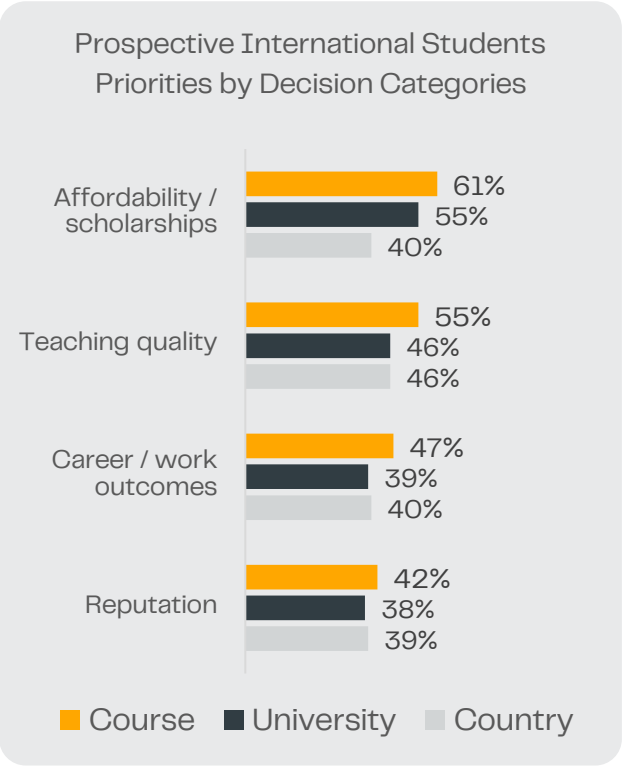
Source: QS Global Student Flows

Institutions that align their recruitment strategy with prospective student priorities will be best placed to compete. Across course, institution and destination choices, prospective students consistently prioritise affordability, teaching quality, career outcomes and reputation, while a welcoming environment is an important factor in choosing a university and a study destination. Future recruitment success will depend on pairing academic excellence with a compelling and inclusive student experience narrative.

52% & 51%

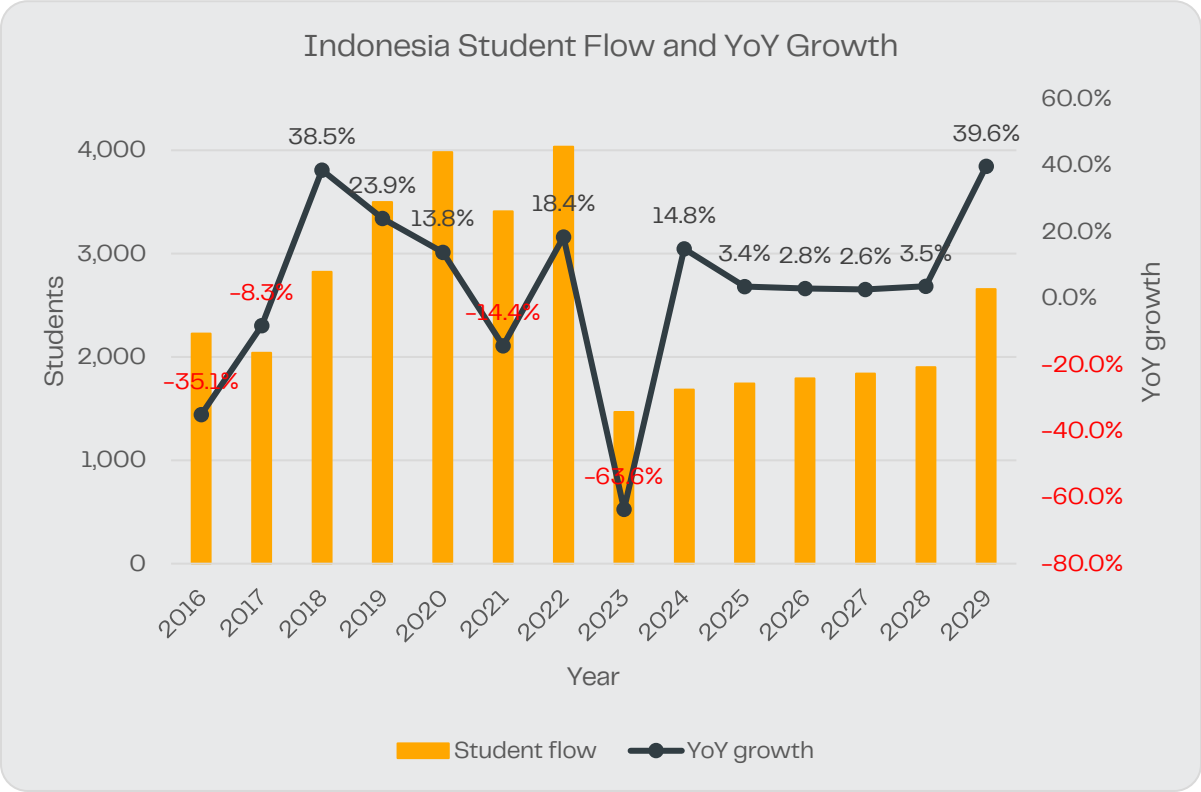
of students said a welcoming environment was important when choosing a country and a university respectively

Source: QS International Student Survey 2026



Source: QS International Student Survey 2026 (Interested in Asia)

Despite recent fluctuations in inbound mobility, Indonesia's international student market demonstrates strong long-term resilience and renewed growth potential. International student numbers are projected to reach 2,656 by 2030, representing a 57.6% increase from 2025 and an approximate 9.5% CAGR over the period. Growth is expected to accelerate towards the end of the decade, with enrolments forecast to rise by 39.6% in 2030 alone. The trajectory highlights Indonesia's growing appeal and its potential to capture a larger share of Asia's expanding student mobility market.



Source: QS Global Student Flows

While affordability, high-quality teaching and a welcoming environment remain the primary considerations, career outcomes are also becoming increasingly influential.

Students interested to study in Indonesia are placing greater importance on graduate employability, careers services and industry links, signalling a growing expectation that higher education should deliver both an enriching academic experience and a clear pathway to employment.

43%

Students prioritise:

High graduate employment rate when choosing a course

Good careers service and links to industry when choosing a university

Source: QS International Student Survey 2026 (Interested in Indonesia)

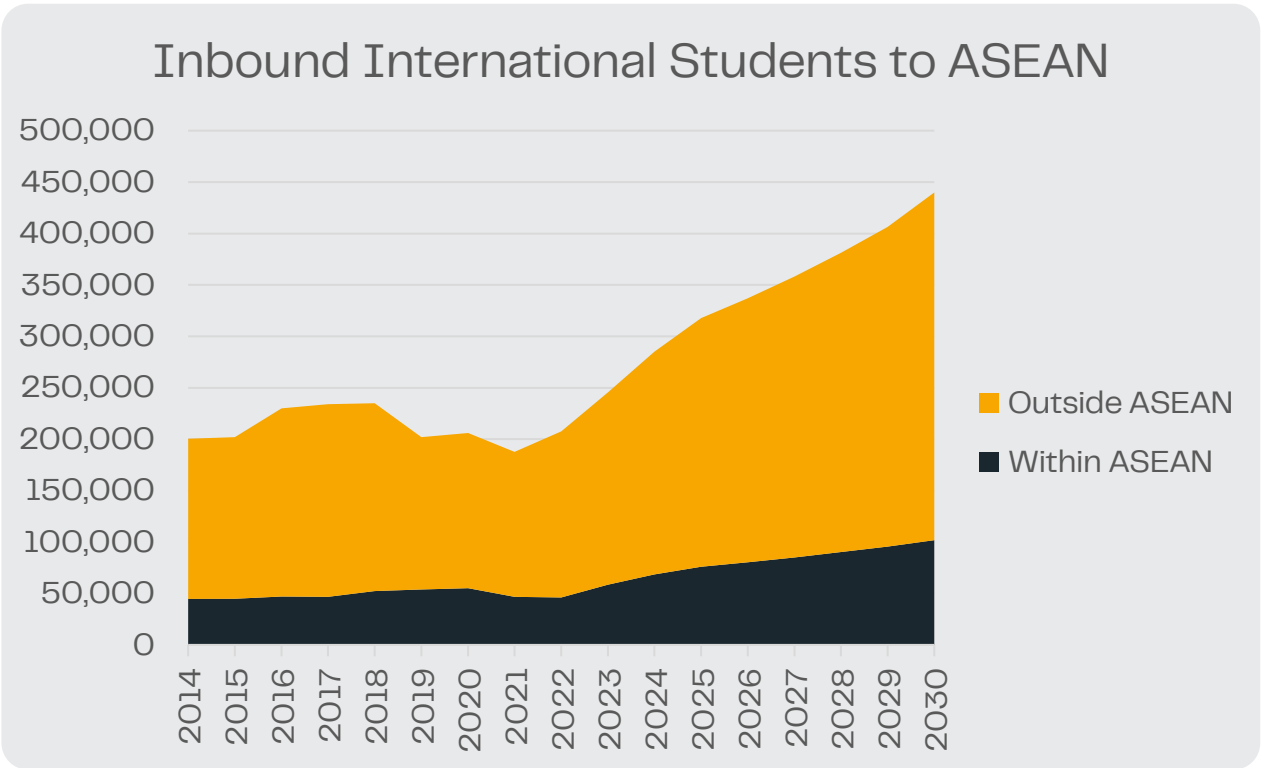
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The Power of Proximity: How ASEAN Can Leverage Intraregional Student Flows

Apart from China, South Korea and Japan, ASEAN countries are the next beneficiaries of the diversification of international student mobility. The region is projected to attract more than 400,000 international students by 2030, led by Malaysia (260,000), Thailand (63,000) and Singapore (62,000).

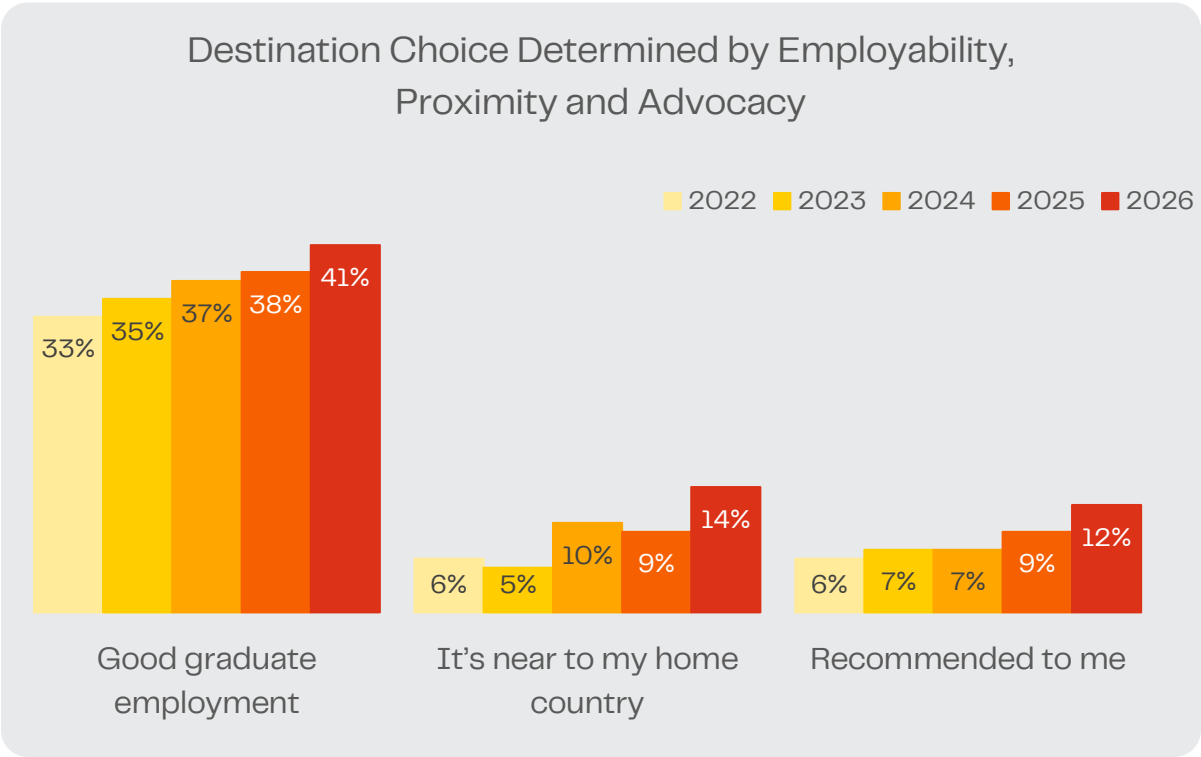
Notably, growth will be driven not only by global demand but also by stronger regional interest, with almost a quarter of international students in ASEAN expected to originate from the region itself by 2030. This highlights the growing importance of intraregional mobility as a foundation for ASEAN's international education ambitions.



Source: QS Global Student Flows

ASEAN's further strengthening of its position as the next major study destination is increasingly shaped by students' priorities in the region's proximity rather than destination prestige. The QS International Student Survey 2026 reveals that studying close to home has become a more influential consideration over the years, more than doubling from 6% (in 2022) to 14% in 2026. This reflects the broader shift towards regional destinations as students seek quality education within familiar cultural and geographical contexts.

The importance of strong graduate employment prospects has risen significantly too, increasing from 33% in 2022 to 41% in 2026, underlining growing demand for clear career pathways and return on investment. Recommendations from peers, family and personal networks have also gained importance, rising from 6% to 12%, highlighting the growing role of word-of-mouth in shaping perceptions of emerging destinations.



Source: QS International Student Survey – Interested in ASEAN

For Indonesia, prospective international students find that the country's affordability is the most appealing.

Rich cultural heritage and destination attractiveness also create a distinctive value proposition, enabling the country to offer international students an accessible, immersive and authentic study experience.

Indonesia's Competitive Positioning

1 Affordable
2 Culturally rich
3 Attractive

Source: QS International Student Survey 2026 (Interested in ASEAN)

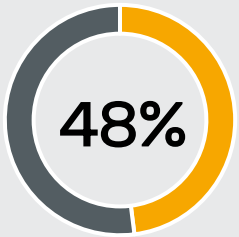
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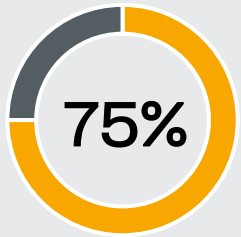
What does AI Integration Look Like Across the Institution?

Academics now see AI as a practical tool. The 2025 QS Gen AI Academics Pulse Survey revealed that nearly half (48%) of academics reported being extremely or very familiar with AI, while 75% perceived its role in society positively. This growing confidence is reflected in behaviour too with 69% now use AI for academic work at least weekly. The shift is even more pronounced across Asia Pacific, where academics demonstrate higher levels of familiarity (50%), positivity towards AI's role (85%), and regular use (72%).

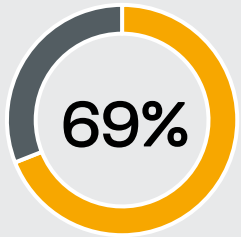
'Extremely' or 'Very' familiar with AI technologies and tools

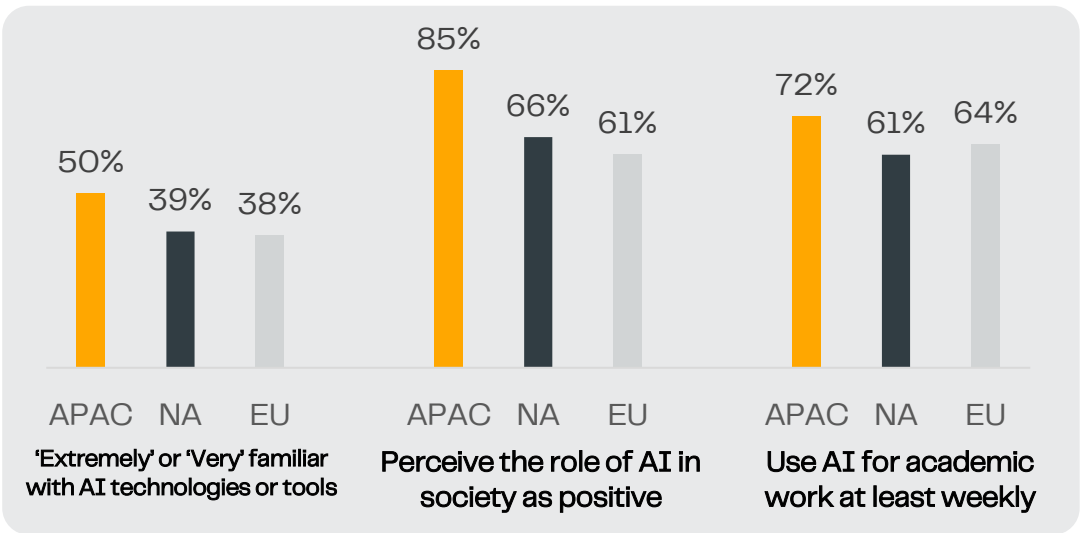


Perceive the role of AI in society as positive



Use AI for academic work at least weekly

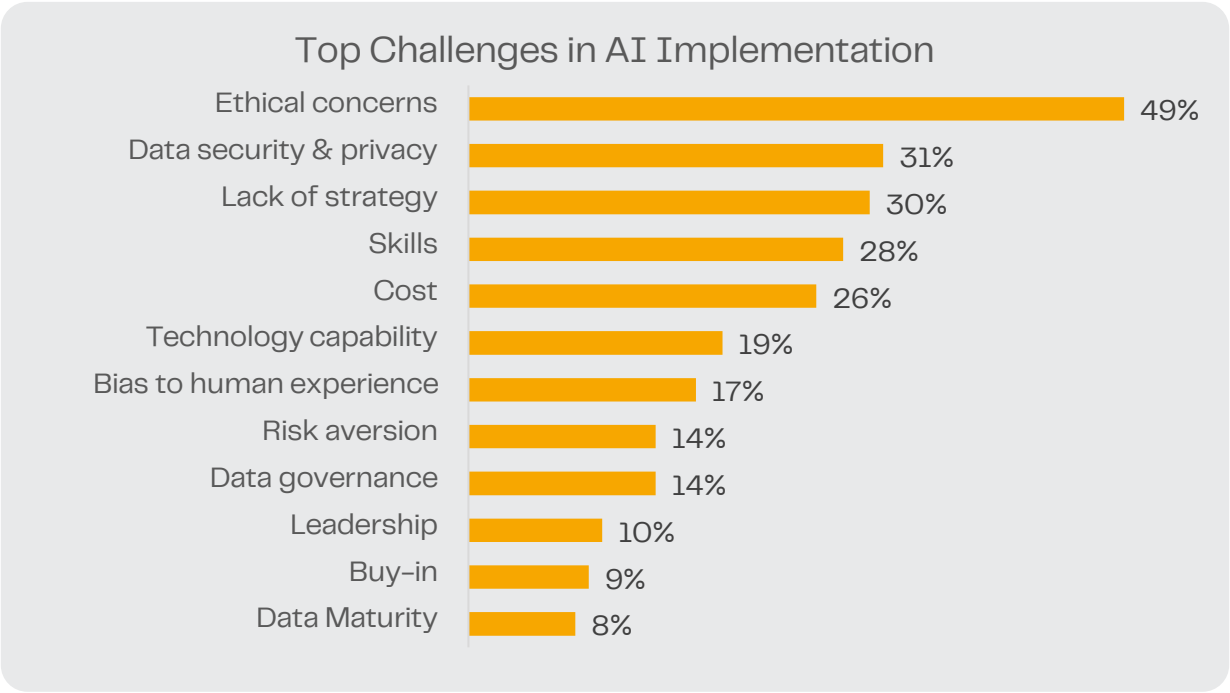




Source: QS Generative AI Pulse Survey 2025

The survey findings suggest that the biggest barriers to AI adoption are not technological, but institutional. Ethical concerns, cited by 49% of academics, reflect growing questions around academic integrity, bias, transparency and responsible AI use, while data security and privacy concerns (31%) highlight the need for clear safeguards around sensitive student, research and institutional data. At the same time, 30% identified a lack of strategy as a key obstacle, pointing to uncertainty about how AI should be governed, deployed and scaled across the institution.

Together, these challenges highlight the importance of a structured approach. The QS AI Capability Framework enables universities to assess their maturity across governance, policy, risk management and organisational readiness, helping leaders move beyond fragmented adoption towards a coherent, institution-wide AI strategy that balances innovation with trust and accountability.



Source: QS Generative AI Pulse Survey 2025

51%

of academics strongly agreed that it is essential to use AI effectively

Source: QS Generative AI Pulse Survey 2025

37%

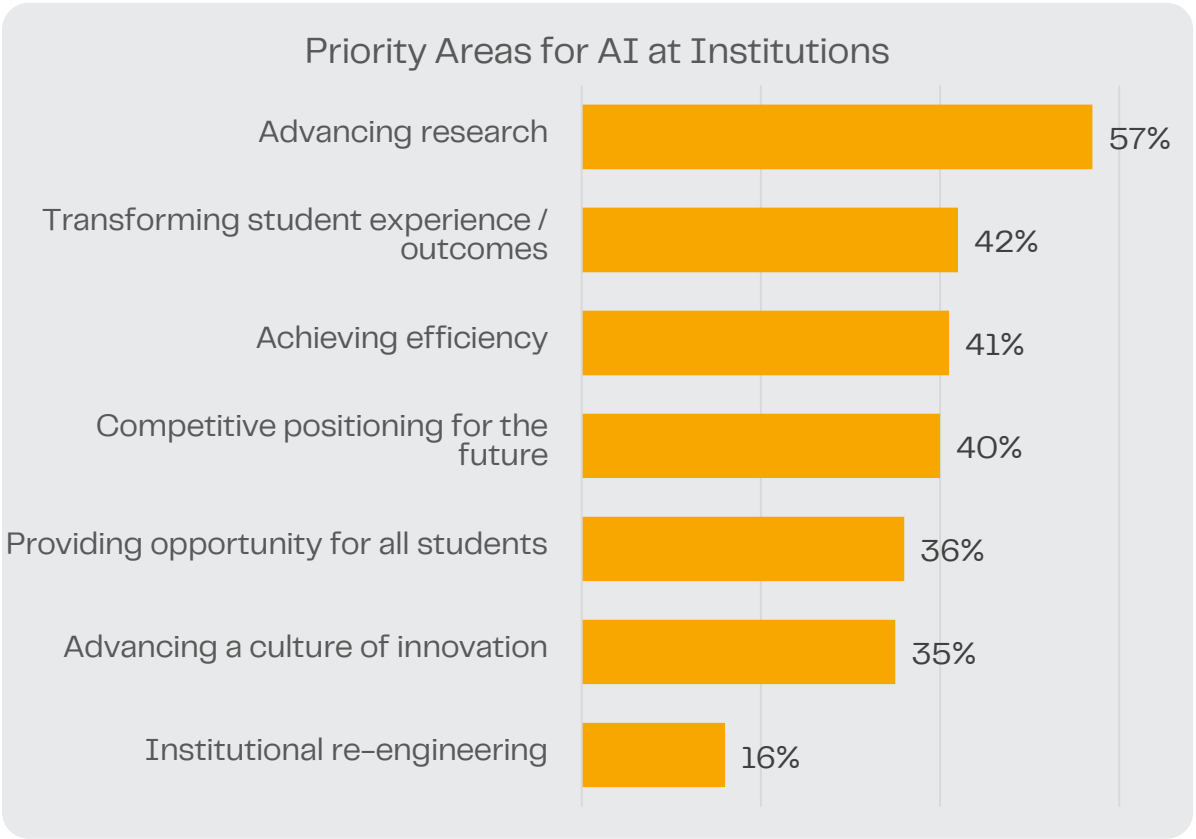
of academics strongly agreed that AI must be incorporated into curriculum

Source: QS Generative AI Pulse Survey 2025

The leading priority areas for AI among academics is advancing research (57%). They see AI as a strategic tool to accelerate literature reviews, data analysis and interdisciplinary collaborations. Beyond research, institutions are also focused on transforming student experience and outcomes (42%), using AI to support personalised learning. Meanwhile, 41% prioritise operational efficiency, recognising AI's potential to streamline administrative processes, reduce manual workloads and free staff to focus on more important activities.

The findings also highlight a strong focus on institutional resilience and inclusivity. Four in ten academics (40%) identify competitive positioning as a key priority, suggesting that universities increasingly view AI capability as a differentiator in attracting students, talent, research partnerships and funding. At the same time, 36% emphasise the importance of providing opportunity for all students, reflecting the potential for AI-powered tools to support diverse learning needs, improve access to academic support and create more equitable educational pathways.

Universities are looking to AI to deliver impact across their core mission, from research excellence and student success to operational effectiveness and long-term competitiveness.



Source: QS Generative AI Pulse Survey 2025

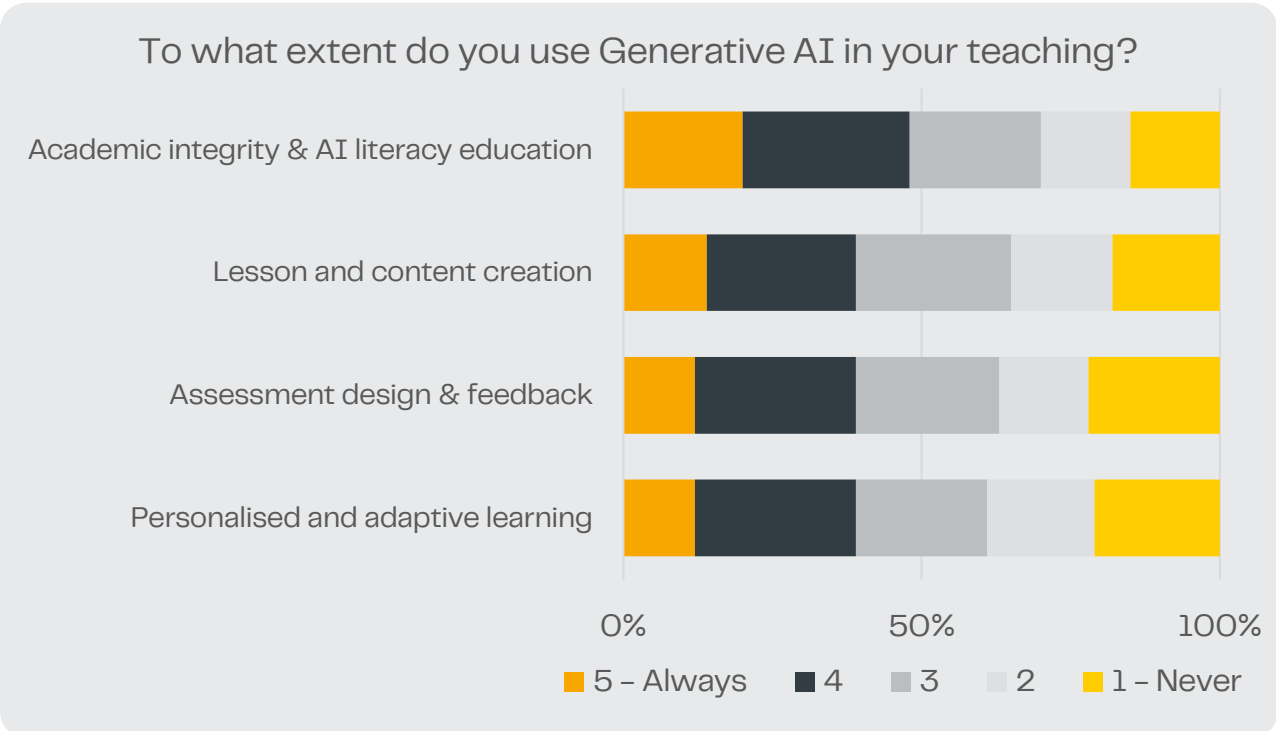
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Leading with AI: Faster Judgement, Better Decisions

Academics are already adopting AI, and they recognise its potential to advance research, enhance learning and improve institutional performance. Yet ethical concerns remain the sector's most significant challenge. This may explain why academics are prioritising AI literacy and academic integrity education, alongside applying AI to lesson planning and content creation, assessment design, as well as personalised learning.

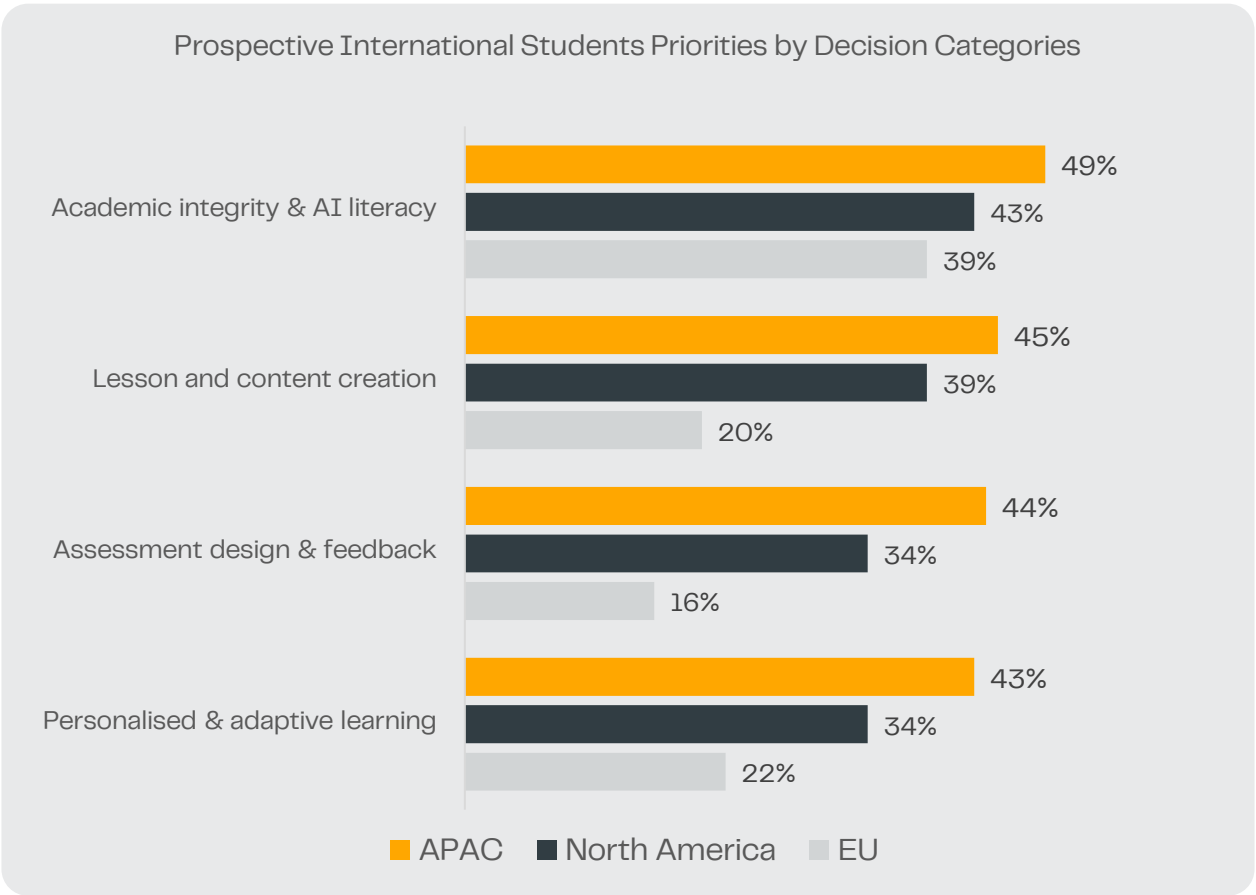
As AI use expands, universities face a growing AI capability gap between individual adoption and institutional readiness. Frameworks such as the QS AI Capability Framework can help institutions assess current maturity, identify gaps and build a structured roadmap for responsible AI adoption. Just as importantly, they provide a shared foundation for decision-making across academic, operational and leadership functions, enabling more consistent and strategically aligned use of AI.



Source: QS Generative AI Pulse Survey 2025

APAC academics will use Generative AI more widely than their counterparts in North America and the EU. Across multiple use cases, they report higher levels of adoption than their counterparts in Europe and North America, including teaching academic integrity and AI literacy (49% versus 43% in North America and 39% in Europe) and applying AI to assessment design. This suggests that academics in the region increasingly view AI not simply as a subject to discuss, but as a tool to actively support teaching, learning and assessment practices.

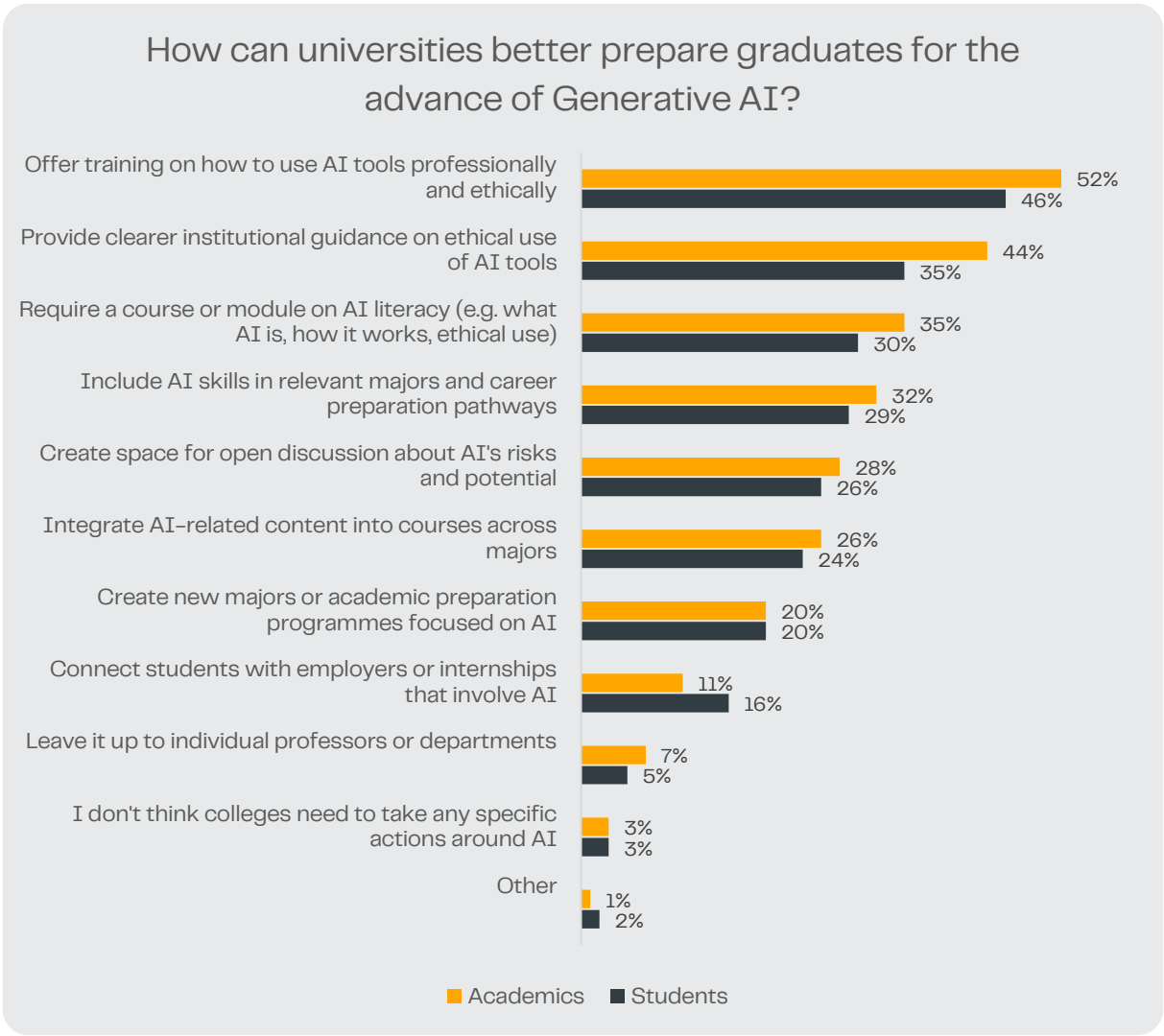
The findings may also indicate that institutions across APAC are responding more proactively to the realities of AI-enabled education. Rather than limiting AI use because of associated risks, academics appear to be integrating AI literacy, assessment design and classroom applications alongside conversations about responsible use. This is significant because AI literacy is becoming a foundational skill for students and staff alike.



Source: QS Generative AI Pulse Survey 2025 (% who rate activity 4 or 5 out of 5)

Both academics and students increasingly recognise that success in an AI-enabled future depends as much on responsible use as technical proficiency. More academics (52%) and students (46%) prioritise training on the professional and ethical use of AI than any other intervention, while 44% of academics and 35% of students call for clearer guidance. Together, these findings point to growing demand for institutions to develop not only AI skills, but also the governance, judgement and decision-making capabilities required to use AI effectively and responsibly.

AI literacy is likewise emerging as a core expectation. Around a third of academics and students support mandatory AI literacy modules and the integration of AI skills into relevant majors, reflecting a desire to embed AI fluency across disciplines.



Source: QS Generative AI Pulse Survey 2025

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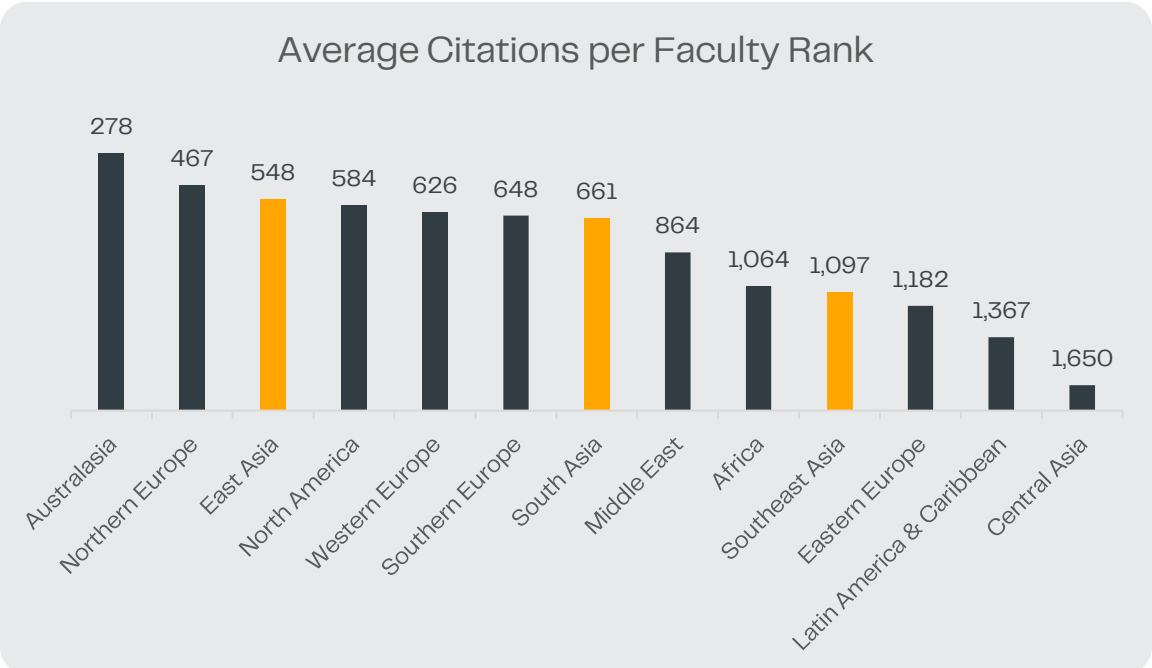
Shaping the Future of Global Research: Asia's Rising Influence in a Transforming Landscape

In the QS World University Rankings, Citations per Faculty (CPF) measures the intensity and volume of research conducted by academic staff, reflecting how widely an institution's research is cited by the global scholarly community.

East Asia has a strong CFP performance, sitting third overall. This indicates that the institutions within the subregion are competitive in producing and promoting their research, which translates into high number of citations.

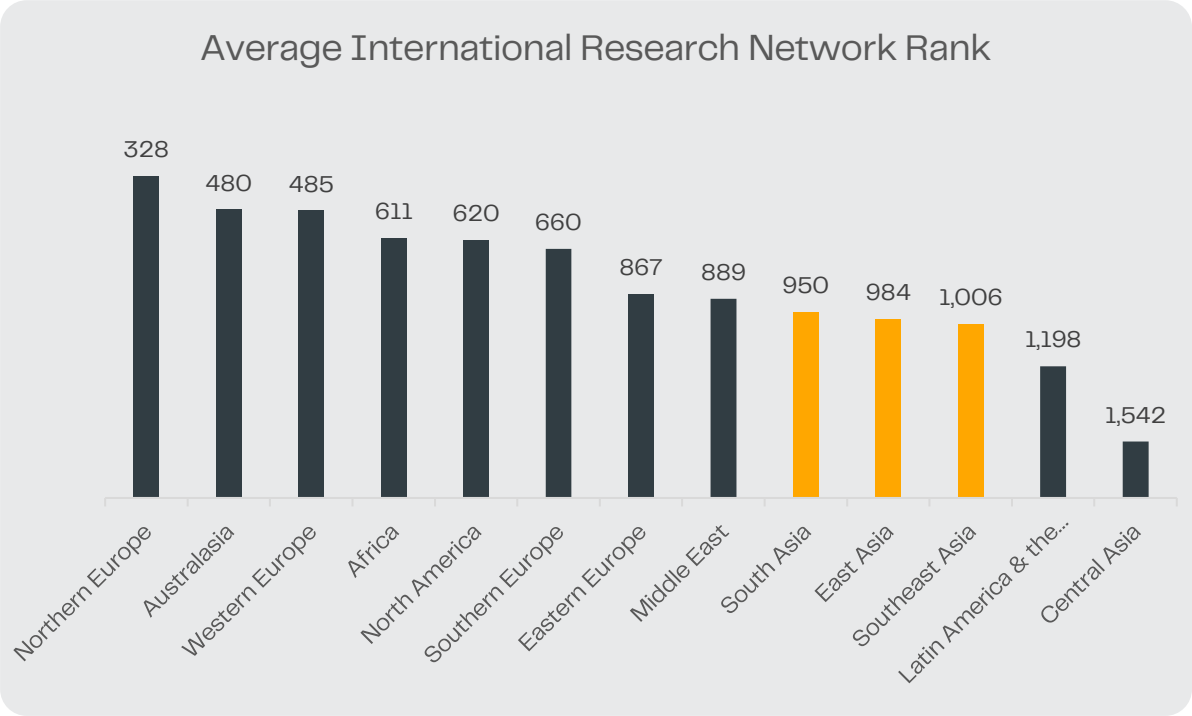
South Asia shows a middling performance but still ranks ahead of the Middle East and Africa. In fact, the subregion's average rank improved in the 2027 edition of the rankings, suggesting growing research intensity and quality.

Southeast Asia ranks ahead of subregion like LATAM, suggesting that despite varying levels of research maturity, the subregion's universities are increasingly producing research with international relevance and visibility. Looking ahead, there is significant scope to further strengthen citation performance through deeper international research collaborations.



Source: QS World University Rankings 2027

Asian universities overall demonstrate stronger research impact than global engagement. South Asia (950), East Asia (984) and Southeast Asia (1,006) all sit in the lower performance band for the International Research Network (IRN) indicator, highlighting the gap between output and connectivity. In the rankings, the IRN measures an institution's ability to build and sustain international research partnerships, which suggests that while the region is producing impactful research, it has yet to fully translate this strength into recurring cross-border collaborations.

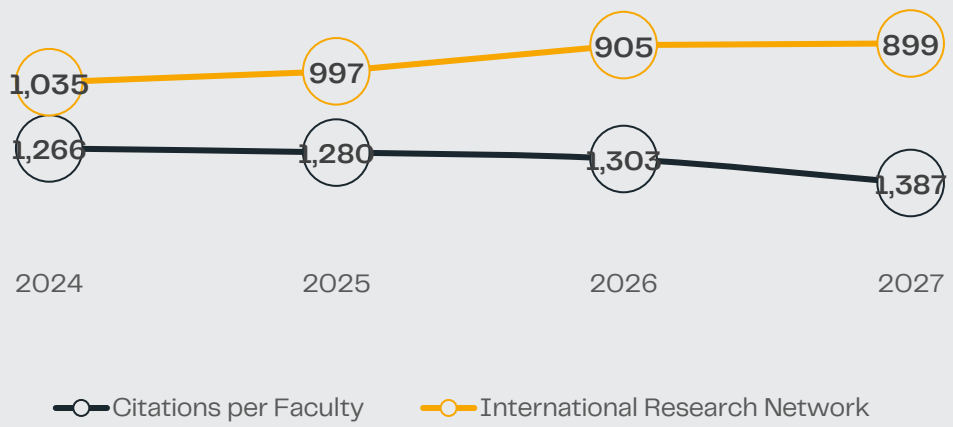


Source: QS World University Rankings 2027

Indonesia's leading universities present an interesting contrast between growing global engagement and weakening research impact. Their average International Research Network rank improves significantly from 1,035 in 2024 to 899 in 2026, indicating increasing success in building sustained cross-border research partnerships.

Meanwhile, the decline in Citations per Faculty rankings suggests that strengthening collaboration networks has not yet translated into proportionally higher research influence. For Indonesia's top institutions, the priority is therefore about leveraging established international networks to pursue higher-impact research projects, increase publication in global journals, and deepen collaborations with leading research institutions. Doing so would help convert the country's growing global connectivity into stronger citation performance and institutional reputation.

Average Citations per Faculty Rank and International Research Network Rank for Indonesia's Top Institutions



Source: QS World University Rankings 2027

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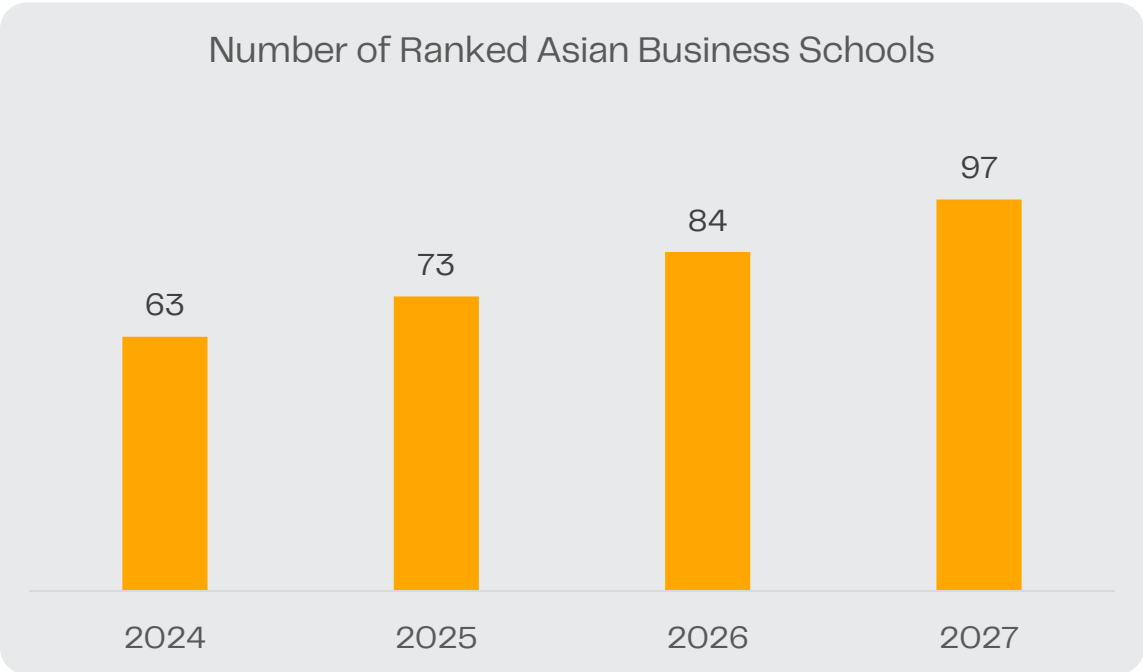
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Asia's New Playbook for Business Education

The QS Global MBA Rankings are among the most widely recognised international benchmarks for business education, evaluating institutions on factors such as employability, alumni outcomes, thought leadership and class diversity. For business schools, strong ranking performance enhances global visibility and reputation, helping attract high-calibre students, faculty and industry partners.

The steady rise in the number of Asian business schools represented in the Global MBA Rankings, from 63 institutions in 2024 to 97 in 2027, signals the increasing international recognition and competitiveness of Asia's business education sector.

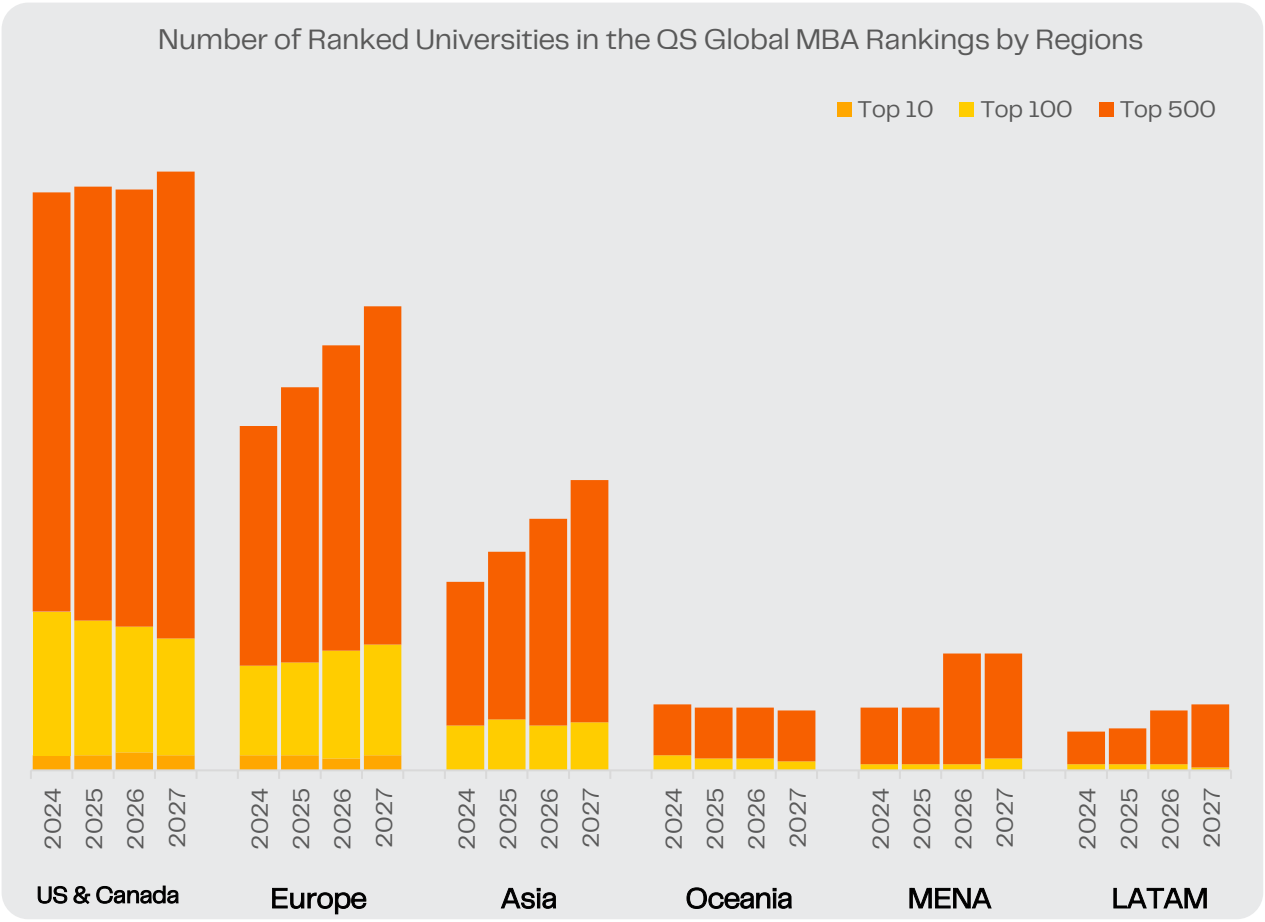
Greater international visibility enables these institutions to attract stronger student cohorts, deepen partnerships with multinational companies and expand global collaborations. As a result, the rise in ranked institutions is both a marker of growing quality and an indication that Asia is developing a distinctive model of business education.



Source: QS Global MBA Rankings 2024–2027

Between 2024 and 2027, Asia maintained a remarkably stable presence among the world's top 100 MBA programmes, with 15 institutions ranked in 2024, 15 in 2025, 17 in 2026 and 16 in 2027. While the region's overall representation in the Global MBA Rankings expanded rapidly during this period, its sustained footprint in the top 100 demonstrates that Asia has established a core group of globally competitive business schools that continue to perform alongside the world's most prestigious MBA providers, reinforcing the region's reputation for business education excellence.

In 2027, Asia accounts for 16% of all institutions in the Global MBA Rankings top 100, giving it a larger share than Oceania (3%), the Middle East and Africa (4%) and Latin America (1%) combined. This means that nearly one in six of the world's highest-ranked MBA programmes is now located in Asia, underscoring the region's emergence as a major centre for management education and a credible alternative to the traditional business school strongholds of North America and Europe.



Source: QS Global MBA Rankings 2024-2027



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