

## How to Observe Changes in Higher Education? Introduction to the Annual Report of GOHEC

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In 2023, we launched the Global Observatory on Change in Higher Education (the Observatory) with a clear purpose: to track and explain how higher education is evolving worldwide. The Observatory meets a rapidly changing landscape by delivering comparable evidence and analysis for data-informed policymaking and by mapping global dynamics of competition and cooperation

### **Why Observe the Changes?**

Higher education research, policy and practice are increasingly using data-driven approaches. We hear again and again about different initiatives to accumulate the statistical data, to produce graphs and tables to support evidence-based national and institutional policy developments.

At the same time there is dominant reliance on static, cross-sectional snapshots - where structures are described in detail, but change itself is discussed only episodically and often retrospectively. Most data collection and analysis centers focus on mainstream trends often omitting local innovations and their potential, which is necessary to capture the complex picture of higher education changes. Most observatories (data-rich think-tanks) tend to focus on descriptive statistical data without analysis of non-traditional sources (like news, analytical texts, websites, etc.) despite modern data collection and data processing tools allowing the use of different sources of information.

At the same time in rapidly changing environment, there is a growing need to observe also **qualitative changes** - the shifts in meanings, norms, practices, and stakeholder experiences—because these reveal the “how” and “why” of change that numeric indicators alone cannot capture. Qualitative observation also surfaces early signals embedded in policy texts, institutional communications, and public discourse, enabling faster sensemaking and course correction than periodic statistics allow. When combined with quantitative metrics, qualitative evidence improves the validity and usefulness of decisions, reducing the risk of metric myopia and misinterpretation of trends.

### **Why observe changes globally?**

Most observatories often focus on national or regional trends and may lack the comparative, global perspective needed to address the interconnected challenges of

higher education systems.

At the same time, the pace, scale, and unevenness of change across countries and regions have accelerated; cross-border policy diffusion coexists with persistent local specificities; and decision-makers, institutions, and researchers increasingly need timely, comparable, and contextualized evidence on trajectories, not just states.

A global lens turns scattered national facts into intelligible patterns. By tracking similar reforms and shocks across multiple systems, we can separate signal from noise, identify inflection points earlier, and understand which mechanisms travel and which remain context-bound. This prevents “copy paste” policymaking by revealing the conditions under which a policy succeeds, adapts, or fails elsewhere.

Global observation also captures interdependence. Student mobility, research collaboration, transnational education, rankings, and digital platforms transmit changes across borders; a visa rule, funding shift, or platform adoption in one country can quickly reshape opportunities and risks in others. Without a global view, these spillovers remain invisible until they are costly to address.

Finally, a global perspective improves fairness and utility. It harmonizes core indicators while preserving contextual narratives, enabling more meaningful benchmarking, illuminating both convergence and divergence, and surfacing innovations from smaller or under resourced systems that often presage broader shifts. In short, observing change globally provides the early warnings, comparative insight, and contextual understanding required for smarter policy transfer, coordinated responses to common challenges, and more resilient higher education systems and at the end, supports bench learning across institutions and regions.

### **The Idea of Global Observatory of Higher Education Changes**

We came to the idea of the global observatory focused on higher education changes in response to the needs outlined above. Unlike large, state-funded observatories that focus on statistical data, GOHEC aim is to be a facilitator of exchange and a network of networks—a collaborative, intellectual hub that leverages the expertise of thematic groups to address complex, comparative, and forward-looking questions in higher

education. We aim to build a vivid, agile, and context-sensitive view of how higher education systems evolve over time.

Conceptually, the Observatory treats “observation” as a practice in its own right: like astronomical or epidemiological observatories, it prioritizes continuous monitoring, early detection of weak signals, and timely interpretation—so change can be seen while it is still emergent, not only after it has consolidated. This means tracking not only counts and averages but also reform events, institutional experiments, and shifting narratives in policy texts and public communications, using both quantitative series and qualitative sources to understand trajectories and their drivers. By design, GOHEC’s value lies in sensemaking across places and time—translating local innovations into comparative insight and mapping how ideas diffuse, adapt, and sometimes fail when they cross borders.

Operationally, GOHEC is built as a distributed epistemic community. The Observatory Office at the Department of Higher Education Research at the University for Continuing Education Krems, Austria, provides the connective tissue: maintaining a shared knowledge base and database of observations, coordinating communications among members, and supporting the production of annual and thematic outputs. Around this hub, groups of the researchers interested in similar topics—with fellows who coordinate activities and outputs—form the Observatory’s core. This organization model keeps costs low, enables participation from diverse regions and disciplines, and privileges intellectual contribution over infrastructure-heavy data collection, making the Observatory feasible even without large up-front funding.

Methodologically, GOHEC commits to source pluralism and methodological hybridity. Members gather evidence from official statistics, literature syntheses, institutional websites, policy documents, and social media, with AI-assisted tools to process large volumes of text and detect emerging patterns that traditional pipelines miss. This is complemented by an “observations commons”: integrated data management and shared protocols so that observations, methods, and metadata circulate and improve over time, strengthening cumulative knowledge rather than adding disconnected reports. In practical terms, the Observatory mixes ongoing horizon scanning and trend analysis with

comparative deep dives and case-based interpretation to support both early warning and careful contextualization.

### **Capturing “What is New” in Higher Education in 2024 – Idea of the GOHEC Annual Report**

Our first year of scoping taught us several lessons. We began by searching for tools, data sources, and analytical lenses suited to ongoing monitoring. Initially, we assumed that themes (governance, funding, teaching and learning, research, quality assurance, internationalization, digital transformation) would serve as the primary anchors. Yet even amid globalization and policy convergence, the concrete expression of change differs markedly by country and region—often in direction, pace, and meaning. We also learned that many policy processes unfold over multiple years; their definitive shape often emerges beyond a single calendar year, complicating “year-in-review” formats. A similar issue arises with institutional innovations: when does the creation of a new entity or programmatic architecture qualify as systemically significant change?

These insights shaped the design of our inaugural report, which is presented as a special issue of the “Journal of Higher Education Research and Innovations”. Rather than imposing a single, homogenizing frame, we organized the report as a set of regionally (and, where needed, country-) focused briefs on “what changed in higher education in 2024,” aligned with a shared but flexible template. This approach preserves comparability while foregrounding context. Still, coverage remains incomplete; several regions and countries are not yet represented. We therefore adopted an open, extensible architecture: regional editors and country correspondents contribute under common guidelines; criteria and templates will be refined annually; and we will progressively broaden coverage through open calls and partnerships.

To define and detect “new” within a single year in higher education in given region we suggested the following principles:

- Typology of change: We classify entries as (a) policy/regulatory acts; (b) governance and funding model shifts; (c) institutional reorganizations and alliances; (d) pedagogical and assessment innovations; (e) QA and accreditation reforms; (f) internationalization rules and mobility patterns; (g) research and knowledge-transfer

policies; (h) digital transformation and data/AI governance. This mirrors the scope of the regional chapters and enables cross-walks in the comparative synthesis.

- **Temporal layering:** Each entry couples the 2024 event with its trajectory—prior signals (e.g., pilots, consultations) and early implementation effects—to avoid mistaking announcements for outcomes. We use a simple maturity scale: announce → pilot → initial implementation → scaling → institutionalization → rollback.
- **Materiality and directionality:** We include only changes with system-level relevance, assessed by reach (population affected), resource magnitude, legal/regulatory weight, and likely persistence. Directionality (e.g., toward/away from centralization, marketization, international openness, academic freedom protections) is recorded to make trends legible over time.
- **Diffusion and distinctiveness:** We flag whether a change is convergent (echoing moves seen elsewhere), adapted (local translation of a circulating model), or divergent (a novel path). This helps identify transferable mechanisms and non-transferable context.

## **The Thematic and Geographical Content of the Report**

### ***Southeast Asia: Navigating Digital Futures and Demographic Challenges***

The Southeast Asian region, encompassing Australia, Indonesia, and Singapore, represents one of the world's largest and fastest-growing higher education ecosystems, serving over 12 million students across more than 7,000 institutions. This analysis reveals seven major changes affecting the region's higher education landscape.

First, **artificial intelligence and digital transformation** have become central to educational innovation, with institutions leveraging AI for personalized learning, administrative efficiency, and interdisciplinary research collaboration. Second, **demographic decline and internationalization strategies** are fundamentally altering institutional sustainability models prompting universities to intensify international student recruitment and diversify revenue streams. Third, there is a **paradigmatic shift toward lifelong learning and the "100-year life" model**, moving beyond the traditional three-stage life pattern of education, employment, and retirement to enable continuous learning throughout extended lifespans.

Fourth, the region is focused on **making education authentic** by going beyond purely cognitive approaches to encompass moral, attitudinal, social and professional formation, helping universities reconnect with their broader social mission. Fifth, there is an emphasis on **accentuating the humanities** to cultivate human qualities that machines cannot replicate, countering the rise of AI with distinctly human-centered education. Sixth, institutions are pursuing **interdisciplinary depth** rather than surface-level breadth, encouraging learners to make deep and dynamic interconnections across diverse fields. Seventh, the region is embracing **research with purpose**, shifting from reputational competitions toward research that addresses societal challenges and engages meaningfully with communities.

### ***East Asia: AI Integration and Strategic Internationalization***

Japan and South Korea exemplify how advanced economies are leveraging technological innovation and strategic internationalization to address demographic challenges and maintain global competitiveness. Three major changes are outlined to characterize the region's higher education evolution.

The first transformation involves **demographic decline threatening university sustainability**, with Japan's 18-year-old population projected to fall below one million by 2031, while Korea confronts similar enrolment pressures that particularly affect regional institutions. The second major change is **comprehensive AI integration across higher education systems**. Japan has emerged as a leader, with the Ministry of Education issuing guidelines for generative AI use while establishing strategic partnerships between universities like Keio University and Carnegie Mellon University to advance AI-driven education and research.

The third significant transformation involves **collaborative, regionalized internationalization approaches** that emphasize stakeholder partnerships between universities, local governments, industries, and NGOs. Korea's Glocal University 30 Project and Study Korea 300K Project exemplify efforts to integrate higher education with regional economic development.

***Europe: Reconfiguring Integration and Values***

The European Higher Education Area presents a unique case of multilateral higher education coordination, where recent changes reflect both the maturation of the Bologna Process and responses to contemporary challenges. Six major transformative trends characterize recent European developments.

**Re-internationalization in the post-COVID landscape** represents a fundamental recalibration of international engagement strategies. European nations are moving away from volume-driven international student recruitment toward more diversified, resilient, and ethically grounded approaches. Countries like the Netherlands have introduced legislation to regulate international student flows due to housing pressures, while Germany has focused on academic partnerships and digital mobility. The second major change involves the **European Universities Initiative**, which has evolved into one of the most emblematic projects within the EHEA, encompassing over 600 higher education institutions across 65 alliances by 2025. However, this initiative faces significant challenges, including legal and administrative barriers, funding limitations, and the risk of reinforcing existing institutional hierarchies.

The third critical development concerns **threats to academic freedom and democratic values** across several European Union member states. While academic freedom is enshrined in the EU Charter of Fundamental Rights, nine EU states now show below-average levels of academic freedom, with eight experiencing statistically significant declines over the past decade. Fourth, **digital transformation and AI integration** is advancing through EU-level frameworks like the Digital Education Action Plan and the AI Act, with institutions balancing innovation opportunities against ethical considerations and regulatory compliance. Fifth, the **rise of micro-credentials and flexible learning** is reshaping access to higher education, with 70% of participating universities offering at least one non-degree program, supporting lifelong learning and professional development. Sixth, education for sustainability and green transitions is gaining momentum through whole institution approaches, though implementation often remains fragmented without systemic policy frameworks to support comprehensive integration.

### ***United States: Political Polarization and the Suppression of Diversity Initiatives***

The United States higher education system in 2024 is characterized by unprecedented political intervention and ideological conflict, marking what may prove to be a critical juncture in American higher education history.

The most significant change involves the **rapid and systematic suppression of Diversity, Equity, and Inclusion (DEI) initiatives** across institutional, state, and federal levels. Following the 2023 Supreme Court ruling ending race-conscious admissions in *Students for Fair Admissions v. Harvard*, more than 100 anti-DEI bills have been introduced in 30 states, with institutions required to eliminate or drastically modify programs designed to address historical inequities. The Trump administration's 2025 executive orders have accelerated this process, threatening federal funding for institutions that maintain DEI programs. This trend is linked to declining public confidence in higher education, particularly along partisan lines, and to the institutionalization of anti-intellectualism and political interference in academic operations. State governments in Florida, Texas, and other Republican-controlled states have implemented laws restricting curricula, influencing faculty evaluations, and controlling institutional governance.

**Financial challenges and rising costs** have created sustainability concerns, with universities facing budget deficits while struggling to maintain affordability and accessibility. And finally, the **impact on international students and global engagement** has been severe, with loud xenophobia that negatively affects both currently enrolled and prospective international students, threatening the United States' position as a leading destination for global higher education.

### ***China: From Following to Leading in Global Higher Education***

China's higher education reforms in 2024 reflect the nation's ambition to transition from a follower to a leader in global higher education, with policies explicitly aimed at building "a world-class doctoral education system with Chinese characteristics" and establishing China as "a globally significant centre for doctoral education". Five major transformations characterize this strategic evolution.

The first major transformation involves **comprehensive restructuring of**

**undergraduate programs** to align with national strategic priorities and technological competition pressures. The Ministry of Education introduced annual update mechanisms for the undergraduate program catalogue, emphasizing emerging fields such as artificial intelligence, quantum computing, and biomedical engineering while promoting "New Engineering," "New Medicine," "New Agriculture," and "New Liberal Arts" initiatives. The second significant change focuses on **enhancing doctoral education quality and scale** through systematic reforms targeting disciplinary structure, professional degree expansion, and university-industry collaboration. China has accelerated doctoral education development, with enrolment increasing by approximately 10% annually since 2017.

The third major transformation involves **empowering the teaching profession** through comprehensive reforms emphasizing professional ethics, competence development, and societal recognition. These policies integrate traditional Chinese educational values with modern pedagogical requirements, positioning faculty development as "the most important foundational work" in China's educational transformation agenda. Fourth, China is **implementing a transition from follower to leader strategy**, with explicit goals to build world-class higher education systems and establish global centres of excellence while maintaining distinctive Chinese characteristics. Fifth, the **development of disciplines for national priorities** emphasizes critical areas including integrated circuits, artificial intelligence, quantum technology, life sciences, and green technologies, with the New Engineering, New Medicine, New Agriculture, and New Liberal Arts initiatives representing interdisciplinary integration aligned with evolving economic and societal demands.

### **Conclusion: Converging Challenges and Diverging Responses in Global Higher Education**

This examination of the changes in higher education across Southeast Asia, East Asia, Europe, North America, and China reveals both convergences and divergences in how different regions are navigating the challenges of the 2020s. **Common trends** emerge around several key areas: the accelerated integration of artificial intelligence and digital technologies across all regions. Demographic decline presents a shared challenge, particularly acute in Japan and South Korea, but also affecting Australia and parts of

Europe, driving similar responses through intensified internationalization strategies and lifelong learning initiatives. The pursuit of more flexible, responsive higher education systems appears universal, whether through Europe's micro-credentials movement or Asia's "100-year life" learning models.

However, **significant regional differences** characterize the policy responses and underlying values driving these changes. The United States stands apart in its retreat from multicultural values that contrasts sharply with Europe's continued emphasis on inclusion and democratic values, despite growing threats to academic freedom. China's centralized, state-directed approach to transitioning from educational follower to global leader differs fundamentally from the more decentralized, market-driven approaches in Australia and the collaborative multilateral frameworks emerging in Europe through initiatives like the European Universities Initiative. Internationalization strategies also vary markedly: while Asia pursues volume-driven student mobility for economic sustainability, Europe emphasizes values-based, resilient international partnerships in its post-COVID re-internationalization efforts.

The speed and scope of these transformations underscore the critical importance of **continued systematic observation and analysis** of these developments throughout 2025 and beyond. The divergent paths evident in 2024 suggest that rather than convergence toward a single model, we may be witnessing the emergence of distinct regional approaches to higher education governance, values, and international engagement that will require sustained scholarly attention to fully comprehend their implications for global knowledge production and democratic society.

We consider this report as a pilot of our approaches for observation of the changes, and we hope that the report of 2025 will cover more regions and new trends.

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