



2025' Global Annual Report on Private Higher Education

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Message from the Rotating President

To colleagues, partners, and all hopeful young people across the global private higher education community:

As I pen this message, rain is falling outside my window. I have just ended a video call with a young student from Gaza—her private university has been reduced to rubble by shelling, yet she persists in a makeshift tent, using an old phone with a cracked screen and an intermittent connection to continue her online business management course. She told me, “Knowledge cannot be killed by bombs. As long as I am alive, I will finish my degree.” That sentence struck like a bolt of lightning, cutting through all rhetorical embellishment to pierce the very soul of this report.

As Rotating President of the International Association of Private Universities and Colleges, it is with a heart heavy with grief yet swelling with pride, with fury intertwined with hope, that I present to the world the 2025' Global Census on Private Universities, Colleges, and Higher Vocational Institutions. This report marks the fifteenth consecutive year that IAPUC has systematically scanned the global private higher education ecosystem. It is also a solemn interrogation, amidst the flames of war, technological disruption, crises of trust, and the tearing of civilizational fabric, of the soul of our sector and the human right to education.

The past year has been one in which private higher education continued to expand its footprint on the global educational map, and one in which it endured the most severe moral tests in its history. Behind the figures—134.2 million enrolled students, a 38.1% share of global higher education enrollment, 1.82 trillion US dollars in total revenue—lies humanity's inexhaustible thirst for knowledge and skills. The proportion of online and blended learners surpassed 41%; artificial intelligence metamorphosed from an auxiliary tool into instructional infrastructure; the rise of micro-credentials transformed “lifelong learning” from a vision into a quantifiable reality. In Africa, private vocational colleges train the next generation of solar energy technicians under conditions of electricity shortages and weak internet. In Latin America, private universities serve as ladders of upward mobility for indigenous students. In Asia, the Fuyao University of Science and Technology in China has burst onto the scene with its educational philosophy of “non-profit, small but elite, internationalized, and focused on high-end manufacturing,” blazing an entirely new path for private research universities in China. These accomplishments give us grounds for cautious optimism about the future.

Yet we must never allow achievements to obscure the dark side, nor permit glossy statistics to gloss over structural decay. In 2025, the number of cases of academic misconduct and corruption climbed to an all-time high. Paper mills operated at industrial scale, peer review was systematically manipulated, and cases of research fund misappropriation emerged one after another. Driven by enrollment pressures and the pursuit of capital profit, some private institutions tacitly condoned or even fostered an internal culture of tolerated fraud. The IAPUC Academic Integrity Risk Index (AIRI) indicates that 13% of institutions fall within the high-risk zone, and 23 private universities were closed or taken over due to financial or academic scandals. Such acts not only desecrate the sanctity of scholarship, but betray the trust of families who paid tuition from their meager savings.

Even more egregious is the brutal trampling of the right to education by war. In the Gaza Strip, multiple private universities have been razed to the ground by shelling—the main teaching building of the Islamic University of Gaza, the research center of the University of Gaza, and the training bases of several private vocational and technical colleges have been reduced to concrete fragments in indiscriminate bombardments. Over 90,000 students have been deprived

of their classrooms, and hundreds of scholars and students have lost their lives. The books in libraries have turned to ash; the data in laboratories have vanished forever. This is not an unavoidable collateral damage of war; it is the deliberate destruction of the common cornerstone of human civilization, a flagrant insult to Article 26 of the Universal Declaration of Human Rights, and a cold-blooded contempt for the fundamental human right that “everyone has the right to education.” IAPUC hereby condemns, in the strongest possible terms, attacks on educational institutions by all parties to conflicts, and singles out the systematic destruction of private higher education facilities during the Israel-Gaza conflict as an unforgivable crime against civilization. At the same time, we solemnly condemn acts by Hamas and other armed groups that use educational facilities for military purposes—campuses are not battlefields, and the sanctity of educational premises must not be desecrated by any party.

It is precisely for this reason that this report is no longer merely a compilation of data, but a confession of the conscience of our sector. In its methodology, we have integrated the strengths of the long-standing census approaches of multiple authoritative associations, including the Association of American Universities, the European University Association, Universities Australia, and the Association of African Universities, and have creatively applied IAPUC’s independently developed “Multimodal Deep-Penetration Census and Resilience Assessment Framework (MDCR).” This framework is not satisfied with superficial scale statistics; it penetrates the skin of governance to measure, in depth, each institution’s academic integrity index, contribution to social mobility, financial transparency, and crisis resilience, striving to present a panoramic view of the sector that is unvarnished, unflinching, and uncompromising.

Here, on behalf of IAPUC, I pay tribute to all teachers and students who hold fast to their classrooms amidst the flames of war, to all institutions that persist in running schools amidst poverty, and to all scholars who refuse to bow to academic misconduct. Let us use this report as a mirror, to reflect both achievements and scars; to applaud innovation, and to toll the death knell for depravity. For we know full well that only by honestly confronting the truth can we truly safeguard every young life that yearns to change its destiny through learning. That is the original aspiration of education, and the sole reason we are gathered here.

Dr. George Mentz

Rotating Chairman, International Association of Private Universities and Colleges (IAPUC)

July 10, 2026

Report Notes and Methodology Statement

This report is the comprehensive 2025 sector census conducted by the International Association of Private Universities and Colleges (IAPUC) based on the Global Private Higher Education Data Consortium (G-PHEDC). The census execution period ran from January 2026 to April 2026, with a data coverage period from January 2025 to February 2026. The census covers 18,452 private higher education institutions across 168 countries and regions, including private universities (granting bachelor’s degrees and above), private colleges (focusing on undergraduate teaching and short-term certificates), higher vocational colleges (delivering skills-based programs within national qualifications frameworks), and registered online private higher education institutions. The effective institutional response rate was 87.6%. For non-responding institutions, multiple imputation methods were applied and calibrated against administrative data published by national education ministries and third-party databases.

To enhance the report's academic reach and capacity for sectoral critique, IAPUC innovatively deployed its independently developed "Multimodal Deep-Penetration Census and Resilience Assessment Framework (MDCR)." This framework integrates the methodological strengths accumulated over many years by authoritative organizations such as the Association of American Universities (AAU), the European University Association (EUA), Universities Australia, and the Association of African Universities (AAU), and, combined with IAPUC's profound insights into the global private education ecosystem, uniquely constructs the following four progressive core dimensions:

Dimension 1: Scale & Structure Scan. Through standardized online questionnaires and multi-source administrative data integration, it systematically collects macro indicators such as institutional numbers, enrollment scale, faculty allocation, financial structure, and digitalization levels, establishing a comparable time-series database across years and regions.

Dimension 2: In-Depth Quality Assessment. Rather than relying on self-reported institutional data, the analysis team independently accessed data from Scopus, Web of Science, national patent office databases, LinkedIn employment tracking data, employer feedback, and third-party audit reports to cross-validate academic output, patent conversion, and graduate employment quality, identifying data anomalies and performance inflation.

Dimension 3: Governance & Integrity Assessment. Drawing on international norms such as the United Nations Convention against Corruption (UNCAC) and the Global Charter of Ethics in Higher Education, it incorporates 12 governance health indicators covering financial transparency, conflict-of-interest management, transparency in handling academic misconduct cases, and the effectiveness of whistleblower protection policies, and constructed the "IAPUC Academic Integrity Risk Index (AIRI)."

Dimension 4: Resilience Foresight Analysis. From perspectives including digital readiness, business continuity planning, financial buffer levels, speed of curriculum and skill renewal, and exposure to geopolitical risk, it assesses institutions' adaptability to technological disruption, policy changes, conflict, and climate risks, forming the "Institutional Resilience Score (IRS)."

All data tables and charts in this report, unless otherwise noted, are generated from MDCR raw data. Any reference to a single institution has been publicly authorized by the institution or derived from its public disclosure documents. IAPUC adheres to the Charter on Transparent Data and Ethics, strictly anonymizing all individual-level data. Regional classifications follow the UN Statistics Division M49 standard. The analyses and recommendations expressed in this report represent the independent judgment of IAPUC and do not represent the positions of any country, government, or funding party.

Executive Summary

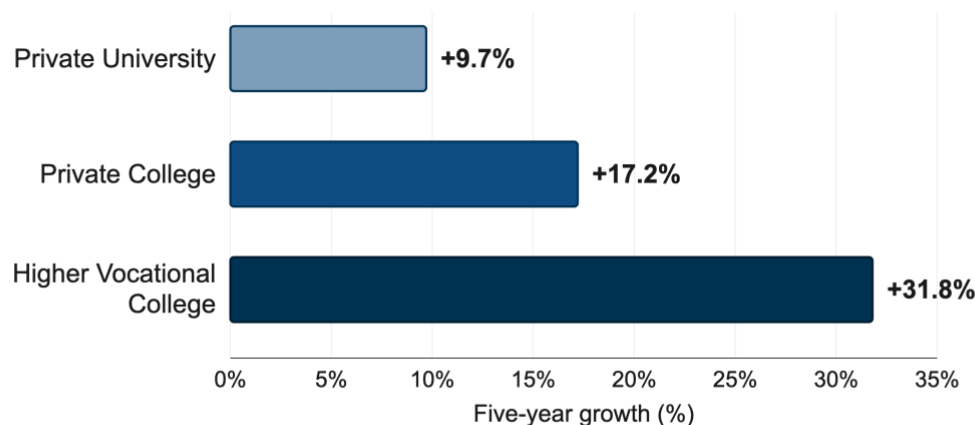
The year 2025 was one in which global private higher education demonstrated extraordinary resilience amidst violent shocks, and also a year when internal contradictions and external impacts intertwined to a white-hot intensity. IAPUC's fifteenth annual census covers 18,452 private higher education institutions globally. Key findings are as follows:

Scale and Coverage

Global enrollment in private higher education reached 134.2 million, accounting for 38.1% of total higher education enrollment, a net increase of 17.2 million over five years.

The proportion of online and blended learning students surged from 28.9% to 47.6%, representing an irreversible structural shift.

The number of higher vocational colleges grew by 31.8% over five years, a growth rate far exceeding other institutional types.



Note: Values represent cumulative percentage changes in the number of institutions between the 2020 and 2025 census rounds; they are not annual growth rates.

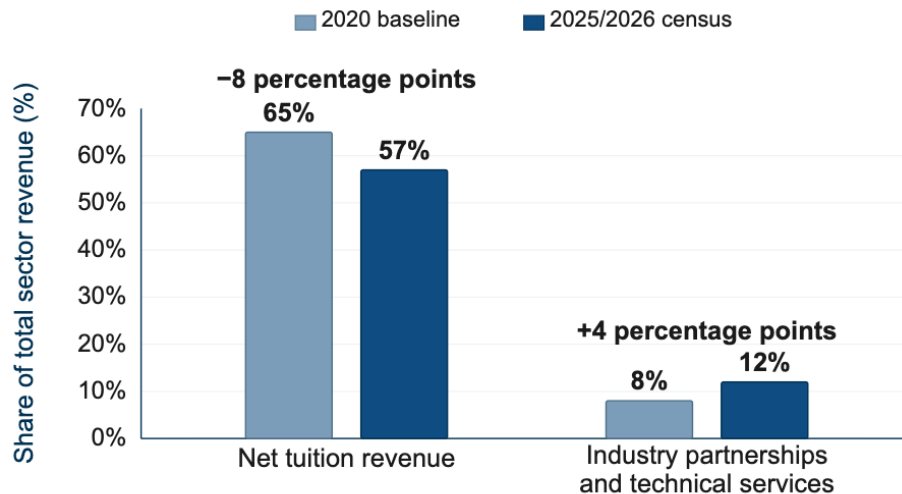
Source: IAPUC MDCR Census Database (2025/2026).

Figure ES.1. Five-Year Growth in the Number of Private Higher Education Institutions by Type, 2020–2025

Finance and Affordability

Total sector revenue was approximately USD 1.82 trillion, with reliance on tuition dropping from 65% to 57%, and the share of industry partnership income rising to 12%.

The median annual undergraduate tuition at private universities globally was USD 8,700; 46% of students received financial aid, with an average discount rate of 28.6%.



Note: Values represent shares of total sector revenue.
Changes are expressed in percentage points.
Source: IAPUC MDCR Census Database (2025/2026).

Figure ES.2. Five-Year Change in Key Revenue Shares of Global Private Higher Education, 2020–2025/2026

Faculty and AI Integration

There were 2.84 million full-time faculty and 1.77 million part-time faculty members and industry mentors. 71% of higher vocational colleges adopted the human-AI dual-teacher model.

Up to 64.6% of faculty were off the tenure track, making job security and the protection of academic freedom urgent issues.

Curriculum Development and Teaching Innovation

87% of leading private universities had modularized their curricula, and 78 million micro-credentials were awarded.

Competency-Based Education (CBE) was implemented 34% of private institutions, raising the first-time employment match rate of graduates by 22 percentage points.

Student Affairs and Mental Health

24/7 multilingual remote psychological counseling became standard, and AI-driven emotional early-warning systems shortened crisis intervention response time to under 6 hours.

Residential-college systems re-emerged at private residential universities, while digital mentor networks expanded at non-residential and online private institutions, boosting student satisfaction by 18 percentage points.

Academic Research and Knowledge Output

R&D expenditure reached USD 78 billion, with the top 50 research-oriented private universities achieving an average FWCI of 1.52.

Higher vocational colleges filed 128,000 patent applications with a 31% conversion rate, generating USD 12.4 billion in horizontal technical service revenue.

Internationalization and Cross-Border Mobility

5.6 million students participated in in-person cross-border mobility, and COIL recorded 6.3 million participation instances.

New regional hubs rose: international student numbers in Malaysia, Ghana, and Colombia all grew by over 28%.

Digitalization and AI Deployment

91% of institutions deployed institution-hosted LLMs, and 86% used academic integrity detection software.

Student persistence rates at online private universities rose by 9.3 percentage points due to AI tutoring.

Industry-Education Integration and Sustainable Development

Over 4,600 substantive Industry Colleges were registered, and degree apprenticeships covered 15% of undergraduates.

68% of surveyed universities published net-zero emission roadmaps, and 82% of those with endowments were divesting from fossil fuels.

Governance and Integrity Challenges

Major academic misconduct cases increased by 22% year-on-year, with paper retractions hitting a record high.

23 private universities closed or were taken over due to financial or academic scandals.

IAPUC's Academic Integrity Risk Index (AIRI) showed 13% of institutions in the high-risk zone.

War and the Right to Education

Multiple private universities in the Gaza Strip were completely destroyed, disrupting the education of over 90,000 students.

IAPUC vehemently condemns attacks on educational institutions by all parties to conflicts, singling out the systematic destruction of private higher education facilities in the Israel-Gaza conflict is unforgivable.

Policy and Innovation

76 countries established for-profit/non-profit differentiated classification management systems, and 23 countries launched regulatory sandboxes for private higher education.

Fuyao University of Science and Technology in China, with its “non-profit, small but elite, focused on manufacturing” model, became a focal point of attention.

China's policy of maintaining a roughly equal ratio between vocational and general education has opened vast space for private higher vocational colleges, which now enroll more than 40% of vocational-college students.

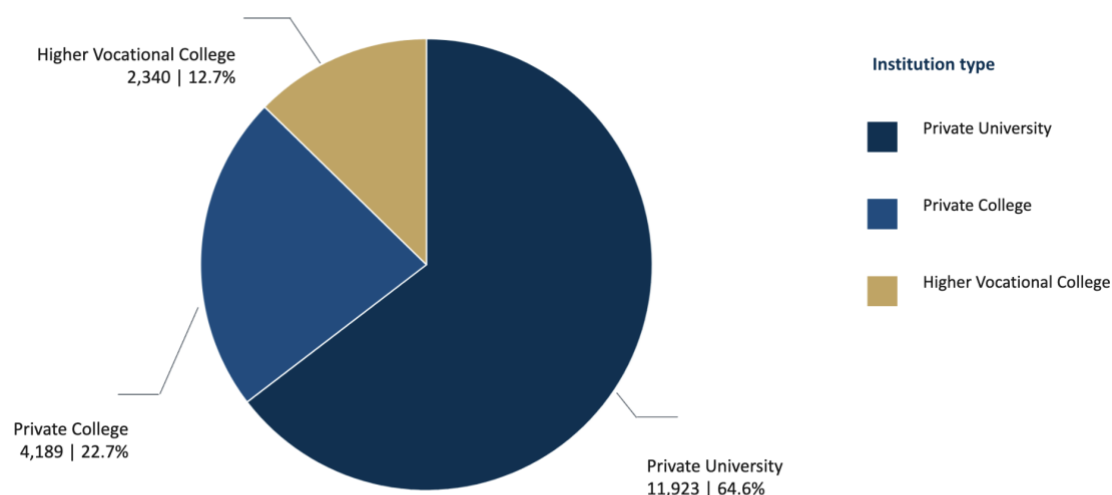
Chapter 1: The Global Panorama of Private Higher Education – Institutions and Enrollment

1.1 Institutional Numbers, Typology, and Geographic Distribution

As of February 2026, the IAPUC global database included 18,452 private higher education institutions meeting the census definition, an increase of 14.3% compared to the 16,142 institutions in the 2020 census, with a five-year compound annual growth rate of 2.7%. The distribution by institutional type was as follows: 11,923 private universities (64.6%), 4,189 private colleges (22.7%), and 2,340 higher vocational colleges (12.7%).

Table 1.1. Global Private Higher Education Institutions by Type, 2025/2026

Institutional Type	Defining Characteristics	Number	Share	5-Year Growth
Private University	Grants bachelor's degrees and above; independent legal entity	11,923	64.6%	+9.7%
Private College	Primarily undergraduate teaching and short-term certificates; may grant associate degrees	4,189	22.7%	+17.2%
Higher Vocational College	Delivers occupational skills programs within national qualifications frameworks	2,340	12.7%	+31.8%
Total	—	18,452	100%	+14.3%



Note: Shares are calculated based on 18,452 private higher education institutions.

Source: IAPUC MDCR Census Database (2025/2026).

Figure 1.1. Distribution of Private Higher Education Institutions by Type, 2025/2026

Source: IAPUC MDCR Census Database (2025/2026)

The growth rate of higher vocational colleges is striking—nearly a one-third increase over five years, with an annual growth rate exceeding 6%. This rate is approximately twice the global GDP growth rate, reflecting the enormous skills gap driven by industrial upgrading, green transition, and digital transformation. With their agile curriculum development capabilities and close industry ties, private higher vocational colleges have rapidly filled niches that public systems could not easily cover.

Table 1.2. Regional Distribution of Private Higher Education Institutions and Enrollment, 2025/2026

Region	Number of Institutions	Global Share	Enrollment (Millions)	Share of Regional Total Higher Education Enrollment
Asia-Pacific	8,156	41.4%	58.3	43.4%
Sub-Saharan Africa	3,284	16.7%	12.1	38.7%
Latin America & Caribbean	3,008	15.3%	19.7	47.2%
Europe	2,380	12.1%	15.4	22.3%
North America	1,624	8.2%	22.6	28.5%
Middle East & North Africa	1,240	6.3%	6.1	31.2%
Global Total	19,692	100%	134.2	35.8%

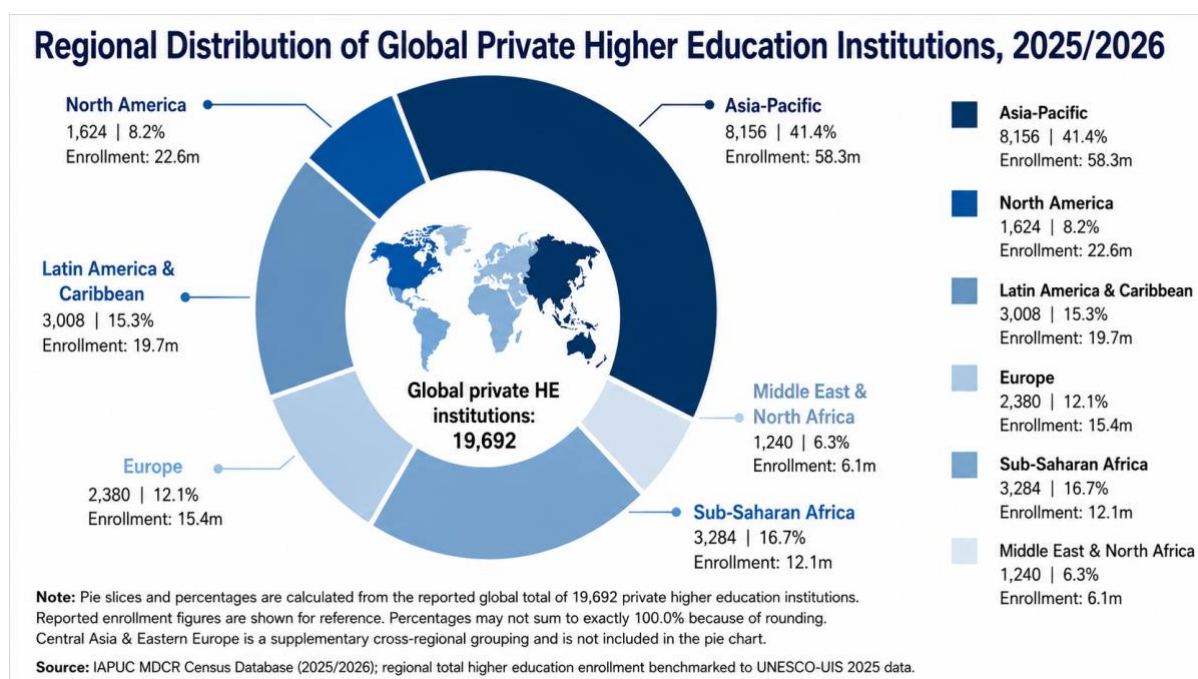


Figure 1.2. Regional Distribution of Global Private Higher Education Institutions, 2025/2026

The Asia-Pacific region leads globally with 41.4% of institutions. India, China, Indonesia, the Philippines, and Bangladesh together account for 73% of private institutions in the region. Among them, enrollment in private universities and affiliated colleges in India reached 38 million, accounting for over 65% of the country's total higher education capacity. Sub-Saharan Africa was the fastest-growing region, with a 21.4% increase in institutions over five years; the number of private universities in Nigeria surpassed 140, and private vocational colleges mushroomed in Ghana, Kenya, and Rwanda.

Latin America and the Caribbean, with private higher education enrollment reaching 47.2% of the regional total, is the most privatized region globally. Registered students in private higher

vocational institutions in Brazil surpassed 7.2 million, and renowned private institutions such as Tecnológico de Monterrey in Mexico wield substantial regional influence.

1.2 Enrollment Scale, Level, and Mode of Study

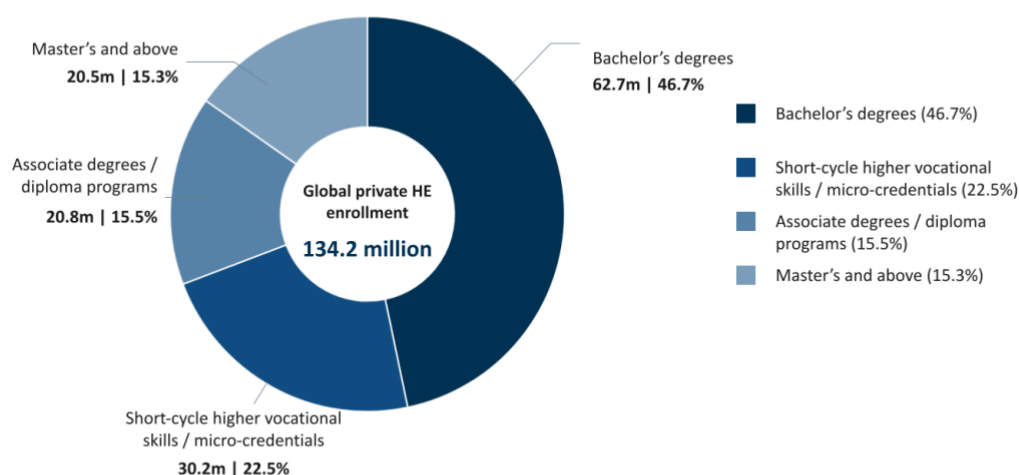
Global private higher education enrollment totaled 134.2 million. By level of study, short-cycle higher vocational skills and micro-credential programs grew most explosively, surging 82% over five years to 30.2 million, underscoring the booming market for lifelong learning and skills renewal.

Table 1.3. Private Higher Education Enrollment by Level of Study, 2025/2026

Level of Study	Enrollment (Millions)	Share	5-Year Change
Short-cycle higher vocational skills / micro-credentials	30.2	22.5%	+82%
Associate degrees / diploma programs	20.8	15.5%	+18%
Bachelor's degrees	62.7	46.7%	+9%
Master's and above	20.5	15.3%	+24%
Total	134.2	100%	+14.7%

Source: IAPUC MDCR Census Database (2025/2026)

Distribution of Global Private Higher Education Enrollment by Level of Study, 2025/2026



Note: Shares are calculated from the reported global private higher education enrollment of 134.2 million.

Source: IAPUC MDCR Census Database (2025/2026).

Figure 1.3. Distribution of Global Private Higher Education Enrollment by Level of Study, 2025/2026

Bachelor's degree programs remain the largest segment (46.7%), but their relative share is slowly declining, from 48.9% five years ago to the current 46.7%. The meteoric rise of micro-credentials and short-cycle skills programs is profoundly reshaping the product form of higher education—learning is no longer a “one-time wholesale purchase” but a “lifetime of multiple retail transactions.”

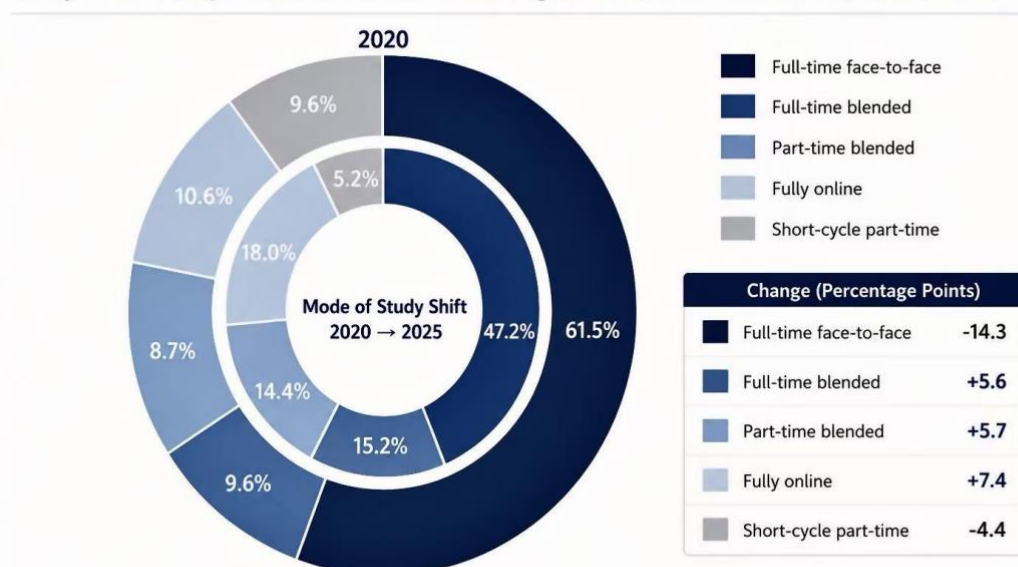
Table 1.4. Study Mode Structure of Global Private Higher Education, 2020 and 2025

Mode of Study	2020 Share	2025 Share	Change (Percentage Points)
Full-time face-to-face	61.5%	47.2%	-14.3

Mode of Study	2020 Share	2025 Share	Change (Percentage Points)
Full-time blended	9.6%	15.2%	+5.6
Part-time blended	8.7%	14.4%	+5.7
Fully online	10.6%	18.0%	+7.4
Short-cycle part-time	9.6%	5.2%	-4.4

Source: IAPUC MDCR Census Database (2025/2026)

Study Mode Composition of Global Private Higher Education Enrollment, 2020 and 2025



Note: The outer ring shows 2020 shares and the inner ring shows 2025 shares. Changes are expressed in percentage points. Online and blended modes comprise full-time blended, part-time blended, and fully online study.

Source: IAPUC MDCR Census Database (2025/2026).

Figure 1.4. Comparison of Global Private Higher Education Study Mode Structure, 2020 and 2025

(Stacked pie chart: Face-to-face dropped from 61.5% in 2020 to 47.2% in 2025; fully online rose from 10.6% to 18.0%; total blended rose from 18.3% to 29.6%)

The total share of online and blended learning reached 47.6%, meaning that over 55.8 million students rely on digital technology to varying degrees to complete their studies. The growth of fully online learning is particularly prominent, closely linked to the global expansion of online private universities (e.g., University of Phoenix, Western Governors University, Walden University) and the proliferation of online degree programs at traditional private universities. Although the COVID-19 pandemic was the catalyst, 2025 data confirms that digital learning has solidified from an emergency measure into an irreversible structural feature.

1.3 Student Demographics: Who Studies in Private Higher Education?

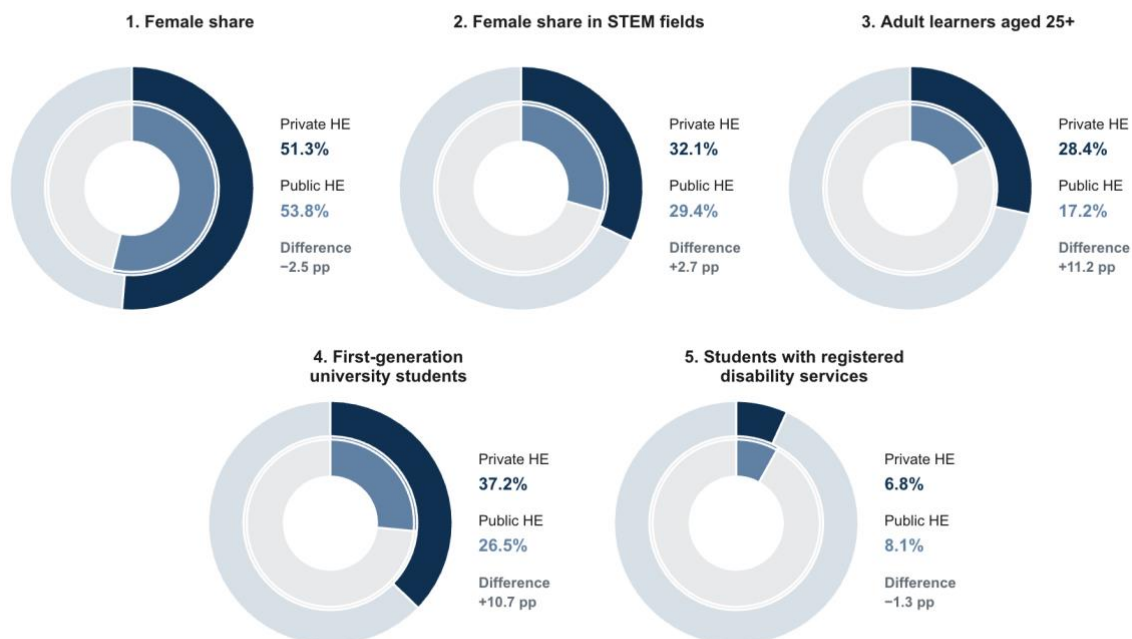
Table 1.5. Student Demographics in Private and Public Higher Education, 2025/2026

Demographic Characteristic	Private HE	Public HE (Comparison)
Female share	51.3%	53.8%
Female share in STEM fields	32.1%	29.4%
Adult learners aged 25+	28.4%	17.2%
First-generation university students	37.2%	26.5%
Students with registered disability services	6.8%	8.1%

Source: IAPUC MDCR Census Database (2025/2026), UNESCO-UIS (2025)

Student Demographics in Private and Public Higher Education, 2025/2026

■ Outer ring · Private HE ■ Inner ring · Public HE



Note: Each doughnut represents a separate demographic indicator; percentages are not additive. The outer ring shows Private HE, and the inner ring shows Public HE. Pale segments represent the remainder to 100%.

Source: IAPUC MDCR Census Database (2025/2026), UNESCO-UIS (2025).

Figure 1.5. Student Demographics in Private and Public Higher Education, 2025/2026

The overall share of women in private higher education is slightly lower than in public systems, but the gap is narrowing. In STEM fields, the female proportion in private institutions (32.1%) exceeds that in public institutions (29.4%), linked to flexible program design, online learning options, and inclusive policies for non-traditional pathway students. For instance, Amity University in India, through its “Women in Tech Scholarship Program,” raised the female share in its Computer Science department from 22% to 38% over five years.

Adult learners (aged 25+) account for 28.4%, nearly double the share in public systems. This group is concentrated in online private universities and private vocational colleges; they are typically employed individuals pursuing upskilling, career change, or compensatory education. The average age of students at the University of Phoenix is 34, and over half are studying for a degree while working full-time. This positioning makes private higher education the most active component of the lifelong learning ecosystem.

First-generation university students account for 37.2%, over 10 percentage points higher than in public systems, marking one of private higher education’s proudest achievements. At Ashesi University in Ghana, this proportion reaches 57%; at numerous private institutions in India and Brazil, over 45% of students are the first in their families to set foot on a university campus. These figures highlight the irreplaceable role of private education in social mobility—it opens doors of opportunity for groups excluded by traditional elite public universities.

Chapter 2: Tuition, Financial Aid, and Financial Sustainability

2.1 Global Tuition Levels and Differentiated Pricing

Tuition is the core price signal for private higher education, connecting institutional financial sustainability with student access affordability. In the 2025/2026 academic year, the median annual undergraduate tuition at private universities globally was USD 8,700, a figure that masks enormous regional and typological variation.

Table 2.1. Median Annual Undergraduate Tuition by Region and Institutional Type, 2025/2026

Region	Non-Profit Universities	For-Profit Universities	All Types Median
North America	36,200	16,800	32,500
Western Europe	15,800	12,400	15,200
East Asia & Pacific	9,500	4,800	7,100
Latin America	5,200	3,100	4,600
Middle East & North Africa	7,800	4,200	6,300
South Asia	2,400	1,100	1,800
Sub-Saharan Africa	3,200	1,500	2,100
Global Median	8,700	3,400	7,200

Note: The global median exceeds regional medians due to uneven weighting of institutional numbers and student distribution across regions. Source: IAPUC MDCR Census Database

The median tuition at North American non-profit private universities reaches USD 36,200, 33 times that of South Asian for-profit universities. This vast gap reflects the multi-layered differentiation within global private higher education—elite, mass-access, and open-access institutions coexist, serving starkly different socio-economic strata. In São Paulo, the annual tuition at an elite private business school might reach USD 18,000, while a private vocational college on the same street might charge only USD 1,200 per year.

Private higher vocational colleges and micro-credential programs offer far more accessible price options. The median annualized tuition for short-cycle higher vocational skills programs was just USD 1,900, with an average fee of USD 450 per micro-credential course. This price range makes private vocational education a vital pathway for skills upgrading among low- and middle-income groups.

Notably, tuition pricing models are undergoing innovative change. Approximately 62% of private institutions implemented some form of differentiated or risk-sharing pricing in 2025, including Income Share Agreements (ISAs), employer-paid models, and modular skill subscriptions. The proportion of students covered by ISAs rose to 3.8%, small in absolute terms but with a clear growth trend.

2.2 Tuition Discounting and Student Financial Aid

The gap between sticker price and actual price paid continues to widen. Tuition discounting—the portion of gross tuition revenue that institutions forgo through scholarships and grants—has become a core strategic tool in private university enrollment management.

Table 2.2. Tuition Discounting and Student Financial Aid Indicators, 2025/2026

Indicator	Non-Profit Universities	For-Profit Universities	Full Sample
Average undergraduate tuition discount rate	32.1%	14.7%	28.6%

Indicator	Non-Profit Universities	For-Profit Universities	Full Sample
Proportion of students receiving aid	58.3%	28.5%	46.0%
Aid as share of tuition revenue	28.4%	11.2%	22.1%
Aid amount per student (USD)	6,240	1,960	4,180

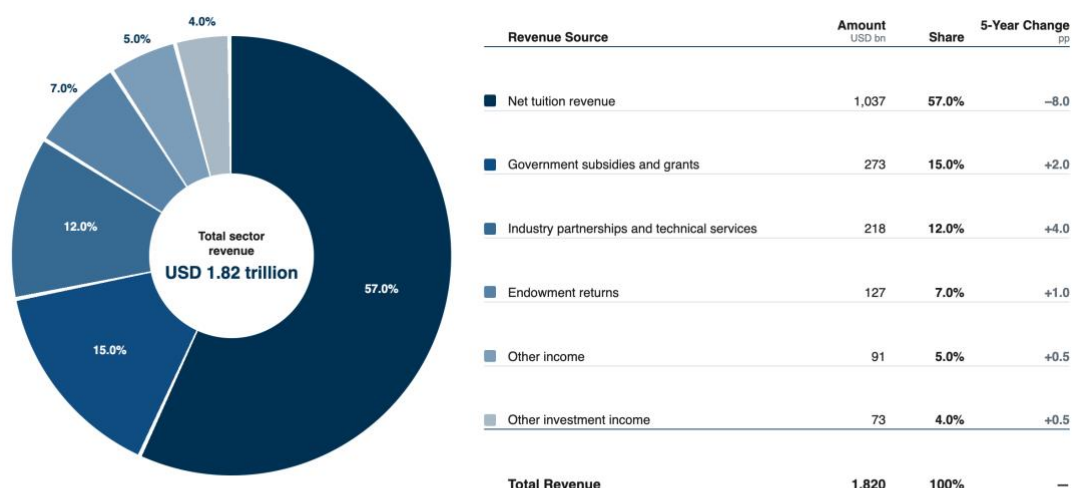
Source: IAPUC MDCR Census Database (2025/2026)

Through high discount rates, non-profit universities effectively lower students' actual payment burden. The University of Southern California in the US announced in 2025 that it would fully cover tuition for undergraduates from families with annual incomes below USD 80,000, a policy covering about 25% of its undergraduates, funded by its USD 6.2 billion endowment. This case is viewed by IAPUC as a model of non-profit private universities using financial strength to promote educational equity.

However, high discount rates can also be a double-edged sword. Some small private colleges struggling with enrollment push discount rates ever higher to sustain student numbers, leading to net tuition revenues that cannot cover operating costs—a “discount trap.” In 2025, 18 private non-profit colleges in the United States announced closures or mergers. The average discount rate at these colleges before closure was 52%, with net tuition revenues below the operating cost threshold. This trend sounds an alarm for the entire sector: discounting is not a panacea, and generosity without a sustainable business model is unsustainable.

2.3 Transformation of Sector Revenue Structure

The most notable structural change is the continued decline in tuition reliance—from 65% five years ago to 57%. Revenue from industry partnerships and technical services rose from 8% to 12%, reflecting deepened industry-education integration, especially in higher vocational colleges and applied universities. Nonetheless, a 57% reliance on tuition remains high, meaning the sector is highly sensitive to economic cycles and consumer confidence. Should a recession cause rising unemployment and declining household ability to pay, institutions overly dependent on tuition will face severe shocks.



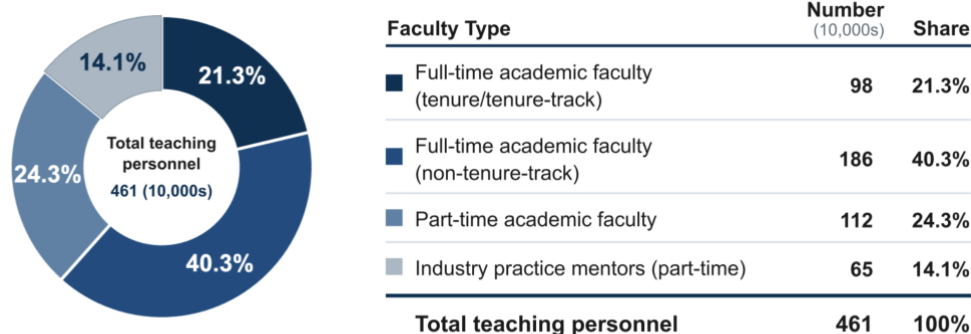
Note: Shares are based on the reported revenue composition and sum to 100.0%. Component amounts are rounded to the nearest USD billion and may not sum exactly to the reported total of USD 1.82 trillion. Changes are expressed in percentage points.
Source: IAPUC MDCR Census Database (2025/2026).

Figure 2.1. Revenue Structure of Global Private Higher Education (2025/2026)

(Pie chart description: Net tuition 57%, government subsidies 15%, industry partnerships 12%, endowment returns 7%, other investments 4%, other 5%)

Chapter 3: Faculty – Structural Transformation and Professional Development

3.1 Faculty Scale and Composition

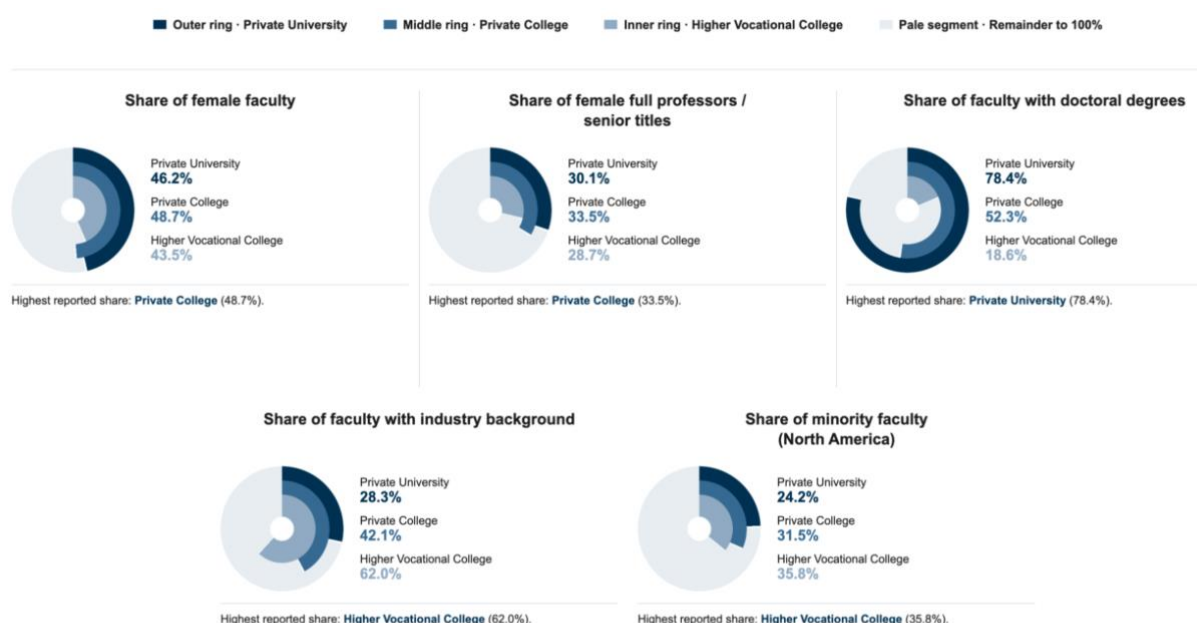


Source: IAPUC MDCR Census Database (2025/2026).

Figure 3.1. Composition of Teaching Personnel in Global Private Higher Education, 2025/2026

Source: IAPUC MDCR Census Database (2025/2026)

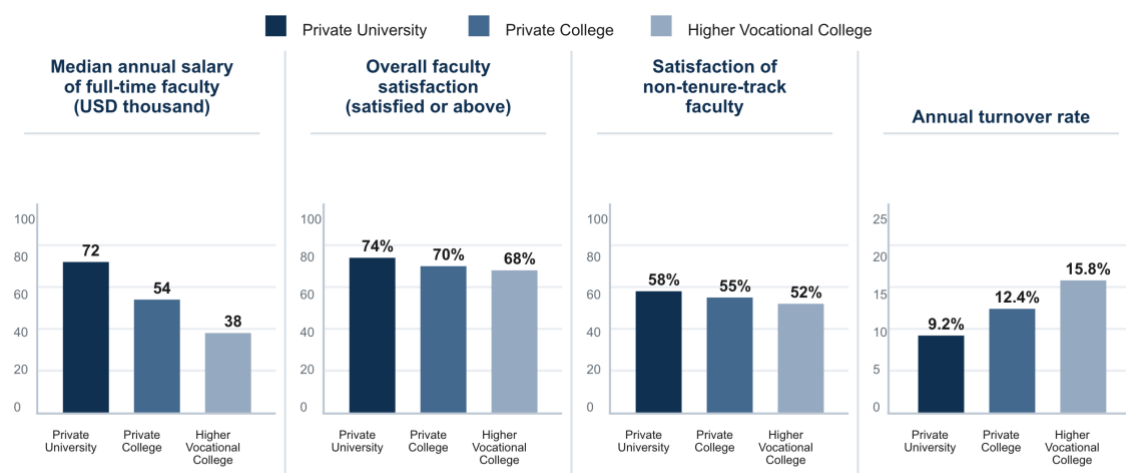
The core structural feature of private higher education faculty is that non-tenure-track teachers account for up to 64.6%. This structure grants institutions flexibility in responding to market changes, but also raises deep concerns about the protection of academic freedom and teachers' professional security. IAPUC advocates that institutions establish fair career development ladders for non-tenure-track faculty and safeguard their rights to participate in governance and academic decision-making.



Source: IAPUC MDCR Census Database (2025/2026)

Figure 3.2. Comparison of Faculty Profiles by Institution Type, 2025/2026

In higher vocational colleges, the proportion of teachers with industry backgrounds reaches as high as 62.0%, constituting a core competitive advantage. These technicians, engineers, and managers from the front lines of enterprises bring vibrant industry practices into the classroom. However, only 18.6% hold doctoral degrees, and most lack systematic pedagogical training. IAPUC recommends that vocational colleges establish a “Mandatory Pedagogical Enhancement Training System for Industry Faculty,” making teaching competency certification a prerequisite for hiring and contract renewal.



Source: IAPUC MDCR Census Database (2025/2026)

Note: Salary is reported as median annual salary of full-time faculty in USD thousand. Satisfaction indicators represent the share of faculty who are satisfied or above. Turnover rate refers to the proportion of full-time faculty who voluntarily left their institution during the reporting year.

Figure 3.3. Faculty Compensation, Satisfaction, and Turnover by Institution Type, 2025/2026

Faculty salaries at vocational colleges are significantly lower than at university-type institutions, and turnover rates are higher. IAPUC calls on the sector to address the compensation competitiveness of vocational college faculty, to prevent faculty attrition from eroding educational quality.

3.2 The Human-AI Dual-Teacher Model and the Reshaping of Teacher Roles

In the 2025/2026 period, 71% of private higher vocational colleges had systematically adopted the human-AI dual-teacher model. AI teaching assistants undertook about 60% of standardized instructional tasks, allowing human teachers to concentrate on cultivating higher-order thinking, emotional interaction, and complex skills assessment.

Table 3.1. Adoption and Outcomes of the Human–AI Dual-Teacher Model, 2025/2026

Institutional Type	Adoption Rate	AI's Share of Teaching Tasks	Change in Student Satisfaction	Change in Completion Rate
Research-oriented private university	42%	28%	+3.2pp	+2.1pp
Teaching-oriented private college	58%	45%	+5.8pp	+4.7pp
Higher vocational college	71%	60%	+8.4pp	+7.2pp
Online private university	85%	68%	+6.1pp	+9.3pp

Source: IAPUC MDCR Census Database (2025/2026)

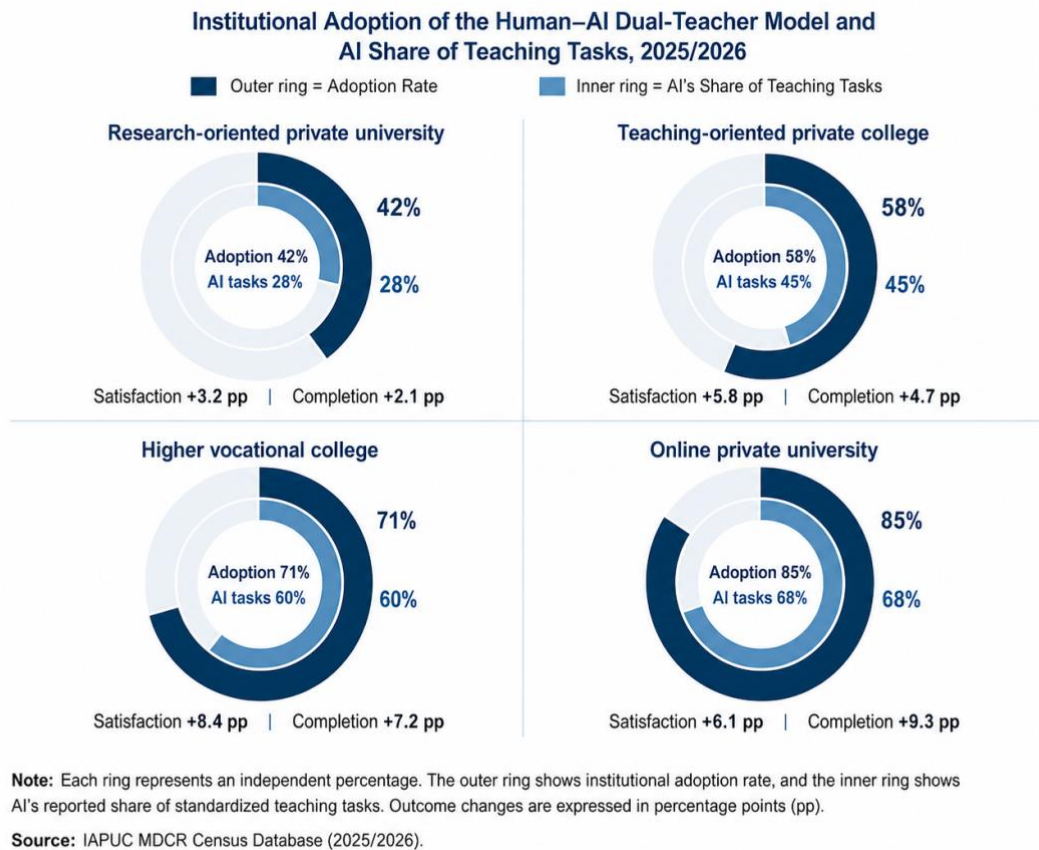


Figure 3.4. Adoption and Outcomes of the Human–AI Dual-Teacher Model by Institution Type, 2025/2026

The University of Phoenix deployed in 2025 an AI-assisted teaching system covering over 2,000 online courses, analyzing learner cognitive states in real time and generating intervention prompts for human instructors. Student persistence rates rose by an average of 12 percentage points, and the number of students effectively guided per instructor increased by about 30%. However, IAPUC also issues a warning: some for-profit institutions have begun replacing part-time teachers with AI rather than augmenting their capabilities. This approach may cut costs in the short term but will erode educational quality and harm student interests in the long run.

3.3 Faculty Professional Development and the Differentiation of New Roles

Faculty roles are undergoing profound differentiation. About 12% of full-time teaching positions were redefined as “Learning Designer” or “Educational Data Analyst” in 2025. 75% of private institutions increased their faculty development budgets, investing primarily in data literacy, AI co-teaching, inclusive pedagogy, and mental health first aid training.

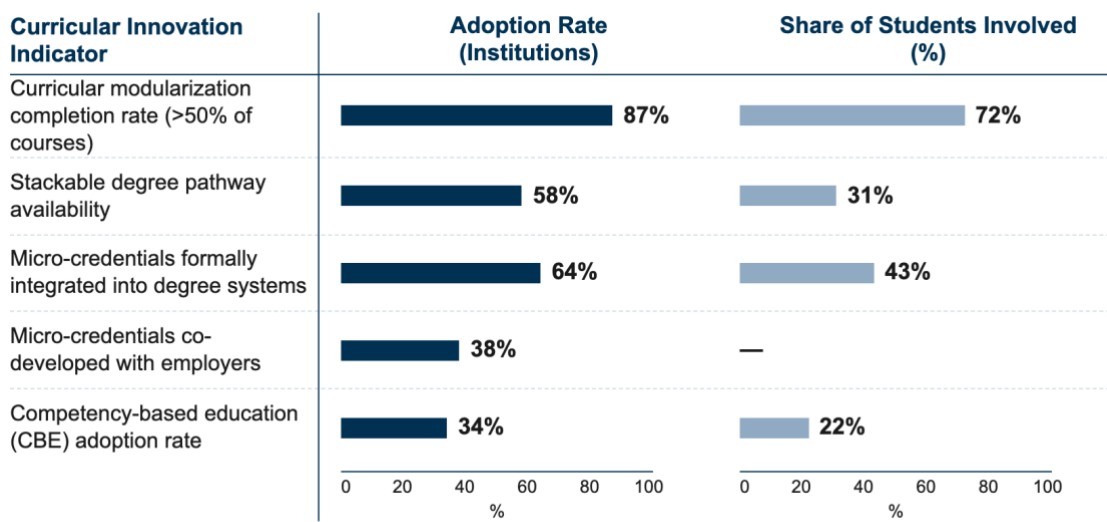
Case Study: The Teaching Experiment at Koç University, Turkey

The teaching center at Koç University systematically employed Randomized Controlled Trials (RCTs) to test the effects of different feedback modes, finding that “voice + text annotation” feedback led to a 28% improvement in student work revision quality compared to text-only feedback. The university accordingly adjusted the feedback standard for all its online courses, becoming a global benchmark for evidence-based teaching practice.

Chapter 4: Curriculum Development and Teaching Innovation

4.1 Modularized Curriculum and the Micro-credential Revolution

In 2025, curriculum development completed a fundamental transition from “fixed yearly timetables” to “continuously iterating learning journeys.” IAPUC surveys show that 87% of respondent private universities had restructured over half of their courses into independently certifiable modules, allowing students to assemble interdisciplinary pathways like building blocks. Micro-credentials ceased to be add-ons and became the standard unit of curricular accounting. According to UNESCO, over 78 million micro-credentials were awarded globally by various institutions in 2025, with private institutions contributing approximately 42%.



Source: IAPUC MDCR Census Database (2025/2026)

Figure 4.1. Institutional Adoption and Student Participation in Curricular Innovations, 2025/2026

Case Study: Stackable Degrees at Tecnológico de Monterrey, Mexico

The institution’s “Digital Transformation Leader” program allows learners first to earn three micro-credentials in “Data Visualization,” “Agile Project Management,” and “AI Fundamentals.” Combined with an enterprise practice project, these can be converted into one-third of the credits for a bachelor’s degree in engineering. In 2025, enrollment in such pathways reached 42,000, a year-on-year increase of 62%. Students can study while working and “pause and restart” their education on demand, realizing a true lifelong learning loop.

Dynamic Curriculum Mechanism: Private RTOs in Australia

Australia’s private Registered Training Organisations, in coordination with Jobs and Skills Councils (JSCs), updated 37% of training package content in 2025, integrating emerging trades such as hydrogen technology, vertical farming, and electric vehicle battery repair into the national qualifications framework. The minimum cycle from industry need identification to course launch was compressed to 12 weeks.

4.2 The Deepening of Competency-Based Education (CBE)

Evaluation standards for courses shifted substantially from “time spent” to “competency demonstrated.” Western Governors University (WGU) in the US, long a pioneer of CBE, further refined its assessment granularity to 85 specific skill tags in 2025. Students earn no credits; they progress by completing projects and passing rigorous assessments that verify mastery of

defined competencies. This model has been emulated by emerging private universities such as the African Leadership University and Plaksha University in India, which have created localized competency standards like “FinTech Product Design Capability” and “Community Health Intervention Capability,” resulting in graduates scoring significantly higher on employment relevance than those from traditional programs.

4.3 Curriculum Update Speed and Industry Responsiveness

Table 4.1. Curriculum Update Speed and Employer Participation by Institution Type, 2025/2026

Institutional Type	New Course Development Cycle (Months)	Annual Curriculum Update Rate	Employer Participation in Curriculum Design
Research-oriented private university	12-18	15%	28%
Teaching-oriented private college	6-12	22%	45%
Higher vocational college	1-3	40%	78%
Online private university	2-4	35%	52%

Source: IAPUC MDCR Census Database (2025/2026)

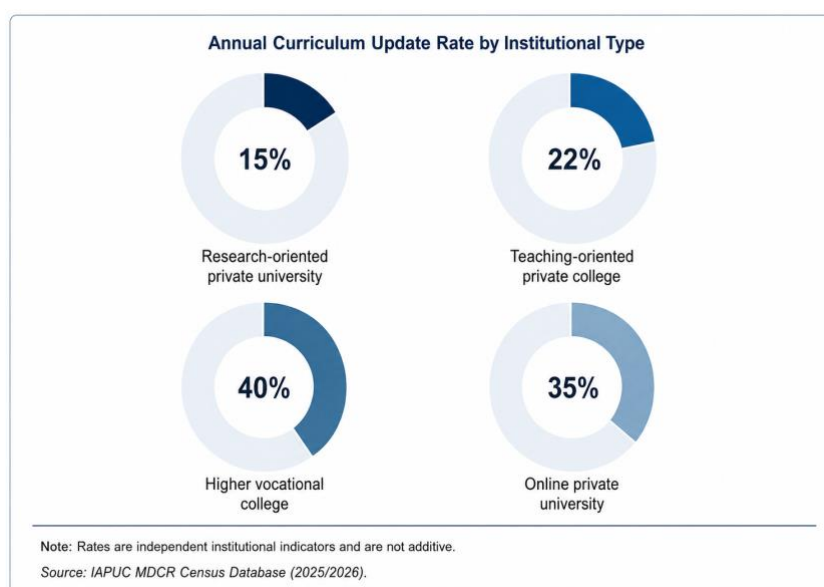


Figure 4.2. Annual Curriculum Update Rates by Institution Type, 2025/2026

Private higher vocational colleges have an overwhelming advantage in curriculum update speed, with new course development cycles as short as one month and an annual update rate as high as 40%. This agility is the wellspring of their core competitiveness. Private polytechnics in Indonesia, through a “Digital Skills Sprint” initiative, developed 27 new short courses related to generative AI in three months, attracting over 150,000 registrations, vividly demonstrating the unique advantage of the private sector in rapidly responding to industrial change.

Chapter 5: Teaching, Pedagogy, and Learning Analytics

5.1 The Institutionalization of Evidence-Based Teaching Practice

In 2025, private universities increased their investment in measuring teaching effectiveness by about 35% over the previous year. Learning analytics moved beyond descriptive statistics to

become intelligent systems embedded in every link of instructional decision-making. Over 650 private universities globally deployed comprehensive learning analytics platforms, tracking more than 810 million learning behavior data points in real time, covering dimensions such as login frequency, resource access paths, discussion forum engagement, and number of assignment revisions.

Table 5.1. Evidence-Based Teaching Practice Indicators, 2023 and 2025

Teaching & Pedagogy Indicator	2023	2025	Change
Share of institutions with a Center for Teaching and Learning	58%	74%	+16pp
Median FTE of educational data scientist team	2.1	4.3	+105%
Annual teaching research papers published (SSCI/SCI)	9,800	12,800	+31%
Share of institutions using RCTs to test pedagogy	12%	22%	+10pp
Faculty data literacy training coverage rate	34%	61%	+27pp

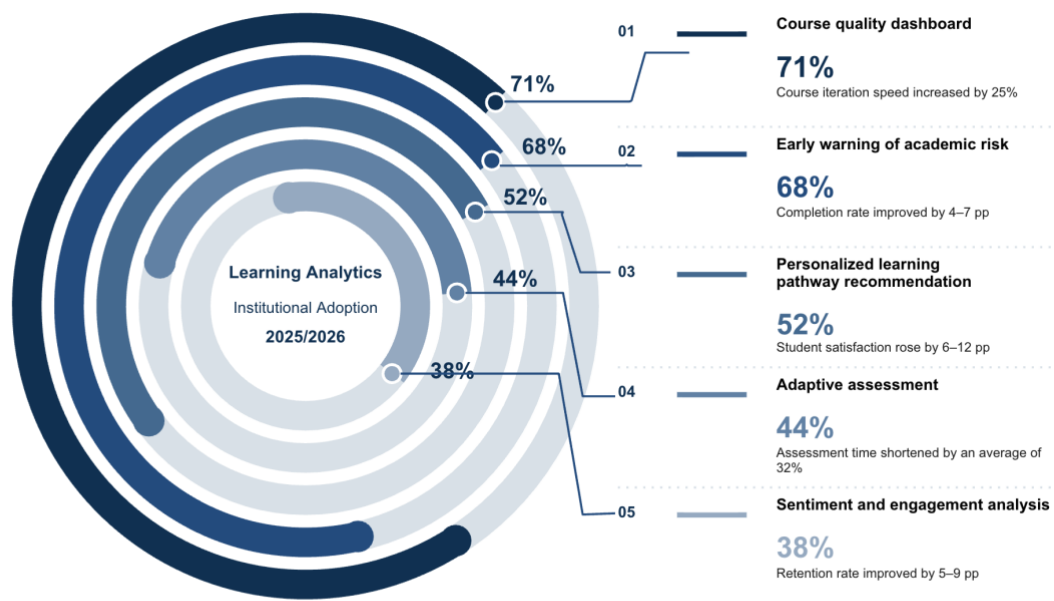
Source: IAPUC MDCR Census Database (2025/2026)

Private universities are no longer bystanders in pedagogical research. The number of SSCI/SCI papers published on teaching practice in 2025 reached 12,800, 2.3 times the figure for 2020. Over 1,500 private universities have established Centers for Teaching and Learning or Education Innovation Labs, with around 300 of them staffing dedicated educational data scientist teams.

5.2 Immersive Hybrid Intelligent Teaching Spaces

The flipped classroom has evolved into the “highly flexible hybrid intelligent space.” Pohang University of Science and Technology (POSTECH) in South Korea extensively introduced Extended Reality (XR) and digital twin labs in its engineering courses. In fluid mechanics courses, students could “fly” inside a virtual pipeline system to observe vortices and adjust parameters in real time. In architectural design workshops, transnational teams wore lightweight AR glasses to discuss structural solutions in a shared holographic model. Such spaces allow experiments that originally carried physical risks to be conducted safely and repeated infinitely. By 2025, over 800 private universities globally had established such intelligent spaces, with usage frequency increasing by 190% year-on-year.

5.3 Personalized Intervention Driven by Learning Analytics”



Note: Each ring represents a separate learning analytics application. Institutional adoption rates are independent and are not additive. Reported effectiveness measures use different units and are presented as annotations rather than on a common quantitative scale.

Source: IAPUC MDCR Census Database (2025/2026).

Figure 5.1. Institutional Adoption of Learning-Analytics Applications, 2025/2026

Chapter 6: Student Affairs, Support, and Mental Health

6.1 Full Lifecycle Student Support System

In 2025, the paradigm of student affairs completed a key transformation: from administration-centric “management” to “full lifecycle support” centered on student success and holistic development. IAPUC data show that per-student spending on non-academic support services at private universities grew by 37% compared to 2020, with 73% of the incremental funding directed toward mental health and career development.

Table 6.1. Student Support Services in Private Higher Education, 2025/2026

Student Support Service	Provision Rate	Per-Student Expenditure (USD)	5-Year Expenditure Change
24/7 psychological counseling	82%	320	+62%
AI emotional early-warning system	58%	145	Newly introduced
Career development center	94%	280	+18%
Academic tutoring center	89%	210	+24%
Residential college / digital mentor network	42%	180	+35%
Disability support services	76%	195	+22%
International student dedicated support	65%	150	+15%

Source: IAPUC MDCR Census Database (2025/2026)

6.2 AI-Driven Mental Health Resilience Network

24/7 multilingual remote psychological counseling has become a basic provision at private universities rather than a differentiating service. More transformative is the widespread deployment of AI-based early-warning systems for emotional distress. Using anonymous Natural Language Processing, these systems analyze linguistic features in students' forum posts, assignment reflections, and surveys to identify risk signals for depression, anxiety, and burnout, sending alerts under strict privacy protection to trained peer supporters or professional counselors. Such systems reduced the average time required for proactive intervention from the traditional 72 hours to under 6 hours. Southern New Hampshire University in the US used this system to increase its response rate to student psychological crisis incidents by 40%.

Case Study: The AI Care Network at the University of Phoenix

In 2025, the University of Phoenix integrated its AI emotional early-warning system with its AI-assisted teaching system to form a dual-track “academic + psychological” early-warning mechanism. When the system detects that a student's learning activity has dropped by over 50% for two consecutive weeks and negative emotional vocabulary appears in writing assignments, it automatically generates an intervention ticket, prompting a student success coach to reach out proactively within 24 hours. This model increased the semester retention rate of high-risk students by 22 percentage points.

6.3 Integration of the Residential College System and Modern Mentorship Networks

Faced with Gen Z and Gen Alpha's craving for belonging and meaning, the residential college system revived at private residential universities. It is not merely a living space but a micro-ecosystem integrating general education, academic support, career initiation, and community life. In non-residential and online private institutions, models of “digital colleges” or “virtual houses” were created: students are grouped by interest areas into cross-year learning circles, mentored by senior students and alumni as “lifelong mentors.” Private institutions globally that have adopted such integrated mentorship systems scored an average of 18 percentage points higher in student satisfaction and 5 percentage points higher in first-year retention.

Chapter 7: Academic Research and Knowledge Output

7.1 Overview of R&D Investment and Output

In 2025, total R&D expenditure at global private universities was estimated at USD 78 billion, an increase of about 19% over 2022. Among funding sources, industry partnerships and competitive research grants rose to 45%, endowment and tuition cross-subsidies accounted for 35%, and government basic research grants constituted 20%.

Table 7.1. Research and Development Investment and Output, 2025

Indicator	Value
Total R&D expenditure (USD billion)	78
Full-time researchers (10,000s)	48.2
Peer-reviewed papers published (10,000s)	49
Share of global higher education paper output	22%
Average FWCI of top 50 research-oriented private universities	1.52

Indicator	Value
Patent applications (10,000s)	12.8
One-year patent conversion rate	31%

Source: IAPUC MDCR Census Database, Scopus, national patent office data

7.2 The Spire Effect and Citation Impact

The top 50 private research universities globally achieved an average FWCI of 1.52, significantly above the global baseline of 1.0.

Table 7.2. Citation Impact of Selected Private Research Universities, 2025

Institution	Country	Areas of Strength	FWCI
Massachusetts Institute of Technology	USA	Engineering, Computer Science, Physics	2.41
Stanford University	USA	Biomedicine, Computer Science	2.38
Okinawa Institute of Science and Technology	Japan	Neuroscience, Physics	2.30
Pohang University of Science and Technology	South Korea	Materials Science, Chemical Engineering	1.94
King Abdullah University of Science and Technology	Saudi Arabia	Environmental Science, Materials	1.76
New York University Abu Dhabi	UAE	Social Sciences, Computational Science	1.62

Source: Scopus/SciVal, 2025 window

Case Study: The Department-less Research Model at the Okinawa Institute of Science and Technology (OIST)

OIST has no traditional departmental structure; researchers collaborate freely across fields. In 2025, it achieved an FWCI of 2.30 in neuroscience. Its “boundary-less research” model offers a wholly new paradigm for private research universities—demonstrating that high-quality research does not necessarily depend on a massive tenure system and a century-old academic tradition.

7.3 Applied R&D in Higher Vocational Colleges

Private higher vocational colleges have built a “just-in-time R&D” system entirely oriented around the needs of small and medium enterprises (SMEs). In 2025, private vocational colleges globally filed a total of 128,000 invention patent applications, 31% of which achieved commercial application within one year through joint prototype development with enterprises. This patent conversion speed is 1.7 times that of public applied universities. Through mechanisms such as “Professor Workshops” and “Innovation Clinics,” revenue from industry-commissioned technical services at higher vocational colleges reached approximately USD 12.4 billion in 2025, becoming a vital pillar of regional innovation ecosystems.

Chapter 8: Internationalization and Student Mobility

8.1 Physical Cross-Border Mobility

In the 2025/2026 period, private universities globally enrolled 5.6 million international students, having recovered to, and slightly exceeded, the pre-pandemic peak. The share of traditional destination countries declined, while new regional hubs rose.

Table 8.1. International Students at Private Universities by Destination, 2025/2026

Destination	International Students at Private Universities (10,000s)	Share of Country's Total International Students	5-Year Change
USA	82	48%	-6%
UK	45	72%	+2%
UAE	32	91%	+18%
Malaysia	22	78%	+35%
Ghana	9	85%	+42%
Colombia	7	42%	+28%

Source: IAPUC MDCR Census Database (2025/2026)

Table 8.2. Major Source Countries of International Students at Private Universities, 2025/2026

Source Country	Number Studying at Private Universities Abroad (10,000s)	Share of Global Private International Students
China	92	16.4%
India	78	13.9%
Nigeria	35	6.3%
Vietnam	22	3.9%

8.2 Virtual Exchange and COIL

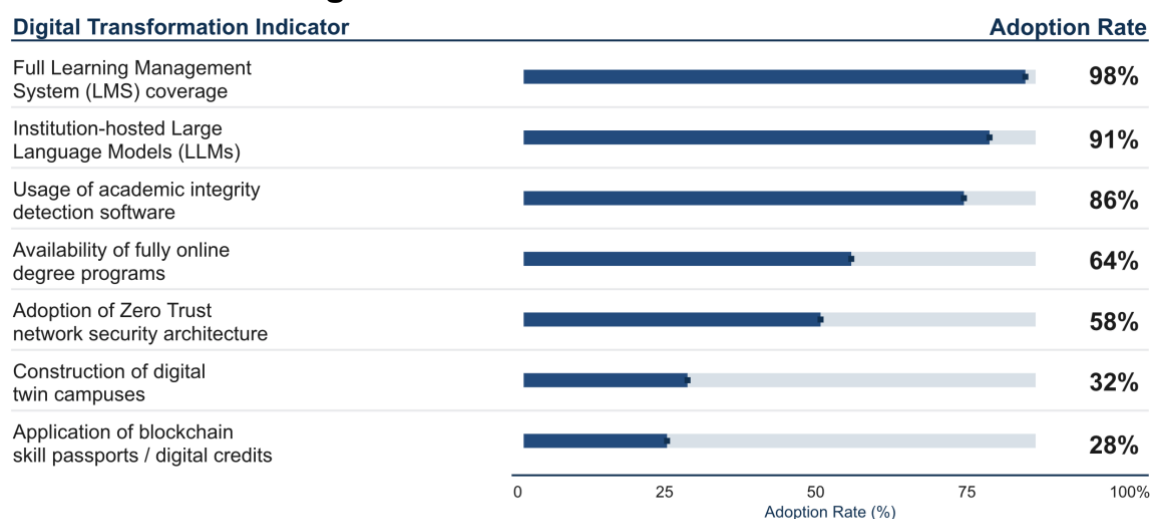
Collaborative Online International Learning (COIL) participation reached 6.3 million, nearly triple the 2022 figure. 22% of private universities have made virtual exchange a graduation requirement. The Laureate International Universities network, in its Fall 2025 “Global Challenge” course themed “Water Security and Urban Resilience,” engaged 4,200 students from 28 campuses in 18 countries in cross-national teams designing solutions for real cities, with three teams’ proposals adopted by local municipal authorities for feasibility studies.

8.3 Overseas Campuses and Industry-Embedded Internationalization

Private universities globally operated 1,450 branch campuses or learning centers abroad. Higher vocational colleges, following an “education-follows-industry” model, established over 350 skills training centers in Belt and Road countries and Africa, achieving a soft export of vocational standards.

Chapter 9: Digital Campus and Online Higher Education

9.1 Panorama of Digital Transformation



Note: Each indicator represents an independent institutional adoption rate; values are not additive.

Source: IAPUC MDCR Census Database (2025/2026).

Figure 9.1. Institutional Adoption of Digital Transformation Technologies, 2025/2026

91% of private universities deployed institution-hosted LLM servers to ensure intellectual property protection and data privacy. AI scientific assistants spanned the entire process from literature review to experimental design and data analysis, estimated to shorten the pre-research cycle in drug discovery by 40-55%.

9.2 The Ecological Niche of Online Private Higher Education

Online private higher education has developed into a large, independent ecosystem. Institutions such as the University of Phoenix, Western Governors University, and Walden University collectively enroll over 1.5 million students. Fully online degree programs serve not only working adults but increasingly traditional-age students as well. However, quality assurance in online education still faces severe challenges—some institutions treat online degrees as low-cost profit-making tools, with insufficient faculty-student interaction and weak academic support. IAPUC recommends establishing global benchmarks for online education quality to ensure educational dignity in virtual spaces.

Chapter 10: Campus Management and Sustainable Development

10.1 Carbon Neutrality and Smart Campuses

In 2025, campus management entered the “full lifecycle carbon neutrality” phase. The IAPUC Global Campus Sustainability Survey shows that 68% of surveyed private universities had publicly committed to a specific carbon-neutral target year (46% of them no later than 2040), and 77% published annual sustainability reports.

Table 10.1. Sustainability Indicators in Private Higher Education, 2025/2026

Sustainability Indicator	Adoption Rate
Published net-zero emission roadmap	68%

Sustainability Indicator	Adoption Rate
Published annual ESG / sustainability report	77%
Used digital twins for energy efficiency management	32%
Building-integrated photovoltaics (BIPV) coverage	28%
Geothermal heat pump / renewable energy heating	35%
Scope 3 emissions included in carbon accounting	24%
Registered campus carbon sink project	12%

Source: IAPUC MDCR Census Database (2025/2026)

The digital twin project on NYU's Manhattan campus helped reduce energy consumption by 22% in fiscal year 2025, saving approximately USD 3.8 million. The new teaching building at the James Cook University Singapore campus received Green Mark Platinum certification and offset historical carbon emissions through a mangrove restoration project. Earth University in Costa Rica operates entirely on a self-built biomass and solar microgrid and has become a regional center for carbon sequestration research.

10.2 Campus Spatial Reconfiguration and Community Opening

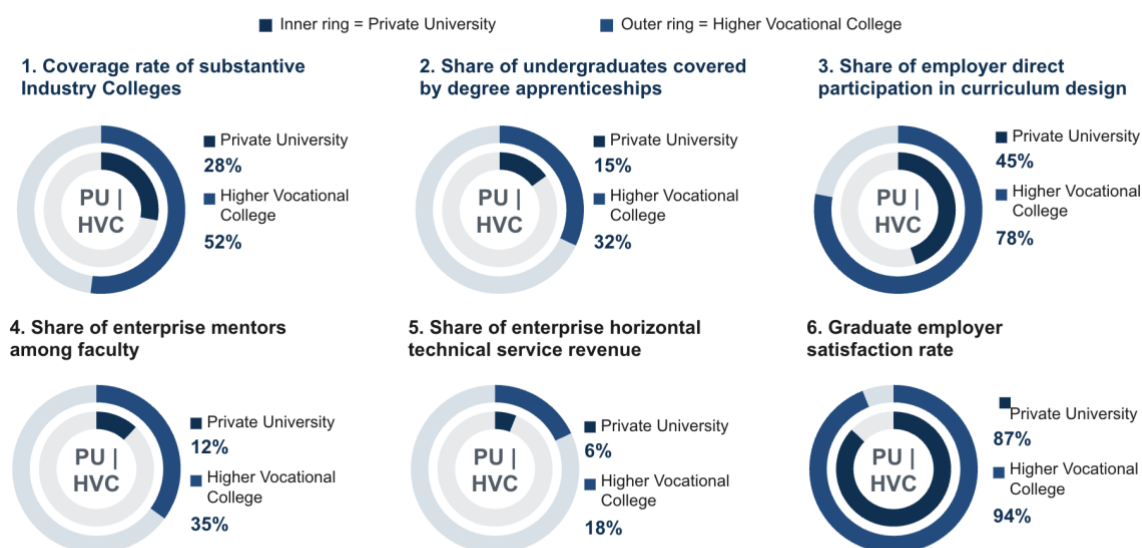
Data-analytics-based dynamic classroom and lab allocation systems were widely applied, reducing fixed dedicated classrooms by 40%, transforming them into on-demand bookable, rapidly reconfigurable project rooms, makerspaces, or contemplation pods. The library at Yonsei University's Songdo International Campus (private, South Korea) no longer has traditional book stacks but has become an academic commons featuring AR inquiry zones, AI writing centers, meditation capsules, and flexible workstations. At the same time, private universities designated their sports facilities, libraries, and auditoriums as municipal emergency shelters, achieving a win-win for social responsibility and public relations.

Chapter 11: Industry-Education Integration and Industry Colleges

11.1 Formally Constituted Industry Colleges Become Mainstream

Distinct from the virtual "named classes" of the past, over 4,600 "Industry Colleges" worldwide in 2025 were either registered as independent legal entities or had joint governance committees. These colleges are co-owned by institutions and leading enterprises, with shared assets, charters, and appointed management teams.

Industry–Education Integration Indicators by Institutional Type, 2025/2026



Note: Each doughnut represents an independent indicator; values are not additive. The inner ring shows Private University and the outer ring shows Higher Vocational College.

Source: IAPUC MDCR Census Database (2025/2026).

Figure 11.1. Industry–Education Integration Indicators by Institutional Type, 2025/2026

The Data Science Industry College co-built by IU International University of Applied Sciences in Germany with SAP and Deloitte counts 50% of the working time of enterprise engineers as teaching load, while 30% of university faculty time is dedicated to collaborative R&D. This institutional arrangement resolves the incentive incompatibility that plagues traditional school-enterprise cooperation. In 2025, employer satisfaction with graduates from Industry Colleges reached 94%, far exceeding that of graduates from traditional models.

11.2 Massive Expansion of Degree Apprenticeships

Countries including the UK, Australia, India, and Canada aggressively expanded degree apprenticeships through legislation or fiscal incentives. In the UK, approximately 65% of newly added degree apprenticeship positions in 2025 were provided through partnerships between private institutions and enterprises. India's National Apprenticeship Promotion Scheme collaborated with multiple private universities to scale up bachelor's-level apprenticeships to 280,000. The core advantage of this model—"zero tuition debt, earn a salary, earn a recognized degree"—is immensely attractive to economically disadvantaged families.

Chapter 12: Emerging Technology R&D and Artificial Intelligence Applications

12.1 AI as Foundational Academic Infrastructure and Educational Restructuring

2025 marked the transformation of generative AI from a teaching aid into a foundational academic infrastructure. 91% of private universities deployed institution-hosted LLM servers, and 86% used AI-assisted academic integrity detection. Artificial intelligence has penetrated the entire chain of admissions, teaching, assessment, research, and student support.

Table 12.1. AI Application Scenarios and Penetration Rates in Private Higher Education

AI Application Scenario	Penetration Rate	Typical Effectiveness
Personalized learning pathway recommendation	52%	Completion rate improved by 4-9pp
AI-assisted assignment grading and feedback	68%	Teacher grading time reduced by 45%
Academic integrity detection	86%	Suspected plagiarism detection rate increased by 32%
Enrollment prediction and precision financial aid	44%	Enrollment conversion rate increased by 18%
Research assistance (literature / experimental design)	38%	Pre-research cycle shortened by 40-55%
Student emotional and psychological early warning	58%	Crisis intervention response time reduced to under 6 hours
Administrative process automation	72%	Administrative costs reduced by 28%

Source: IAPUC MDCR Census Database (2025/2026)

12.2 XR and Safe Practical Training

Private higher vocational colleges have become pioneers in XR-based immersive training. Virtual reality and augmented reality, combined with AI-generated environments, can now simulate multiple high-risk, high-cost scenarios, from emergency evacuations on deep-sea oil drilling platforms to microscopic wear-and-tear inspections inside aircraft engines. A key breakthrough lies in the fusion of “physical haptic feedback” and “AI dynamic scenario generation.” Private hotel management schools in Germany and Switzerland used this technology to enable students to repeatedly practice serving guests with special needs in a virtual environment, significantly enhancing empathy and adaptive capacity. These technologies reduced training costs by an average of 70% and achieved zero personal risk.

12.3 AI Ethics and the Global Governance Alliance

Leveraging their cross-border and interdisciplinary agility, private universities became hubs for AI ethics research and international dialogue. In 2025, a consortium of 30 private and privately chartered universities, including the Pontifical Academy for Life, Mohamed bin Zayed University of Artificial Intelligence, MIT, and Stellenbosch University in South Africa, jointly launched the “Global Responsible AI in Education Network” (Global RAIEd Network) and published the “Berlin Consensus on Algorithm Auditing and Transparency in Higher Education.” The Consensus proposed five core principles—explainability, non-discrimination, human oversight, privacy protection, and contestability— which were incorporated into practical guidance accompanying UNESCO’s Recommendation on the Ethics of AI.

Chapter 13: Governance, Integrity, and the Challenge of Academic Misconduct

13.1 Governance Structure and Differentiated Classification

Seventy-six countries globally have enacted legislation clearly distinguishing between for-profit and non-profit private institutions, an increase of 12 compared to 2020. Non-profits constitute 68% of institutions, but for-profit vocational colleges are growing rapidly. Differentiated classification is driving financial transparency, yet in some countries, “fake non-profit, real for-profit” regulatory arbitrage persists.

13.2 Academic Misconduct: Systemic Crisis and Quantitative Analysis

In 2025, IAPUC's global Academic Integrity Risk Index (AIRI) monitoring indicated that 13% of private higher education institutions were in the "high-risk" zone (AIRI < 40). Major academic misconduct cases increased by 22% year-on-year.

Table 13.1. Statistics on Academic Misconduct Cases in Private Higher Education (2025 vs 2024)

Misconduct Type	2024	2025	Change
Paper mills / contract cheating	1,240	1,580	+27%
Data fabrication / falsification	980	1,210	+23%
Peer review manipulation	340	420	+24%
Research fund misuse	210	320	+52%
Degree selling / diploma mills	85	102	+20%

Source: IAPUC AIRI Database (2024-2025)

Cautionary cases:

In March 2025, a private university in India was exposed for operating a systematic paper mill network involving professors, administrative staff, and off-campus essay mills, which assisted nearly a thousand students in fabricating research outcomes over three years. The university had part of its degree-granting authority revoked by India's University Grants Commission.

In August 2025, the vice-chancellor of a private university in Brazil was accused of misappropriating research funds for personal investment, triggering mass student protests and legal action.

13.3 Recommendations: Building a Global Firewall for Academic Integrity

IAPUC solemnly calls for:

All private higher education institutions must establish independent academic integrity offices that report directly to the board of trustees.

Whistleblower protection policies for academic misconduct must be mandatory, with third-party anonymous reporting channels established.

National regulatory bodies should establish cross-institutional information-sharing platforms on academic misconduct to prevent sanctioned scholars from "moving between institutions to conceal their records"

A global "Academic Integrity Blacklist" mechanism should be created to enforce transnational disclosure and joint sanctions against institutions and individuals that commit serious violations.

All private institutions should incorporate academic integrity education as a compulsory course for new students and implement an annual re-certification system.

Chapter 14: War, Conflict, and the Defense of the Right to Education

14.1 Gaza: The Deliberate Destruction of Higher Education

In 2025, the destruction of higher education by armed conflicts globally reached the most severe level since World War II. IAPUC recorded that at least 58 private higher education institutions in 12 countries were severely damaged or completely destroyed in conflicts, with the losses in the Gaza Strip being the most appalling.

Since the escalation of the conflict in October 2023, all 12 higher education institutions in the Gaza Strip have been bombed and damaged, at least 6 of which are private universities or colleges. The main campuses of the Islamic University of Gaza and the University of Gaza have been razed to the ground; laboratories, libraries, and data centers have been reduced to rubble. Over 90,000 students have been forced to interrupt their studies, and hundreds of teachers and students have been killed. These buildings were not military targets; they were temples of knowledge, ladders of social mobility, and landmarks of human civilization.

IAPUC condemns, in the strongest possible terms, the systematic destruction of private higher education facilities during Israel's military operations in Gaza. Such acts constitute a grave violation of the Geneva Conventions and their Additional Protocols and amount to collective punishment against the Palestinian people's right to education. The deliberate targeting of educational institutions is a crime against civilization and is utterly unforgivable.

Simultaneously, IAPUC solemnly condemns the use of educational facilities for military activities by Hamas and other armed groups. The sanctity of educational premises must not be desecrated by any party, and any use of schools as military strongholds is likewise a violation of international humanitarian law.

14.2 Educational Catastrophes in Other Global Conflict Zones

In Ukraine, multiple private universities in the eastern and southern regions were damaged during the war, with some forced to relocate or switch entirely to online teaching. In Myanmar, political turmoil caused a sharp decline in private higher education enrollment. In Sudan, civil war forced the closure of several private universities in the capital Khartoum, scattering faculty and students.

14.3 Defending the Right to Education: IAPUC's Five Appeals

Article 26 of the Universal Declaration of Human Rights solemnly proclaims: "Everyone has the right to education... higher education shall be equally accessible to all on the basis of merit."

IAPUC calls for:

The United Nations Security Council's adoption of a binding resolution designating the deliberate targeting of educational facilities as a war crime and establishing an independent investigative mechanism.

The International Criminal Court's inclusion of attacks on universities within the scope of its war crimes investigations.

The establishment of an "Emergency Relief Fund for Private Higher Education in Conflict Zones" to provide urgent educational assistance to displaced students.

The creation of a global "Sanctuary Campus" program to offer temporary academic placements for students and scholars from conflict zones.

The designation of July 30 each year as the “Remembrance Day for the Right to Higher Education” to commemorate the trauma and alert the future.

Chapter 15: Policy Environment and Regulatory Trends

15.1 Differentiated Classification and Regulatory Sandboxes

Seventy-six countries have established systems for the differentiated classification and management of for-profit and non-profit institutions. Twenty-three countries have launched regulatory sandboxes for private higher education, allowing compliant institutions to pilot innovations in areas such as micro-credential awarding, online degree granting, and flexible tuition pricing. Singapore’s Committee for Private Education expanded its sandbox scheme in 2025, permitting qualifying institutions to pilot autonomous degree awarding and competency-based admission pathways.

15.2 Risk-Proportionate Regulation and Quality Transparency

The risk rating assessment model of the UK Office for Students has been emulated by multiple countries. In partnership with global quality assurance networks, IAPUC launched the “Global Transparency Dossier on Private Education Quality,” which now covers over 2,800 institutions, enabling students and parents to verify accreditation status and key performance indicators through a single portal.

15.3 Policy Recommendations

IAPUC recommends that national governments: establish clear and enforceable legal frameworks for for-profit/non-profit classification; create an independent higher education ombudsman system; and provide private higher vocational colleges with equal access to government training and research funding opportunities.

Chapter 16: Crisis Management and Resilience Building

16.1 Zero Trust Networks and Information Resilience

The education sector became a prime target for ransomware attacks in 2025, with attack frequency rising 43% year-on-year. Private universities widely adopted Zero Trust network architectures, and dozens of large private universities jointly formed the “Higher Education Cyber Resilience Alliance,” establishing a mutual insurance fund.

16.2 Business Continuity Management

Business continuity management systems based on the ISO 22301 standard were established in 68% of private universities, ensuring that core teaching, student support, and basic research could be restored within hours of a disruptive event. In 2025, when an earthquake forced the closure of its main campus, a private university in Turkey, relying on a well-rehearsed BCMS, shifted all teaching activities to cloud backup nodes within 3.5 hours, with zero student data loss.

16.3 Mental Health Crisis and the 1-Hour Intervention Circle

Leading private universities built a “whole-community guardianship” system—dormitory supervisors, security guards, librarians, and trained peers all form a distributed guardian network. Once the system issues a high-risk alert, a cross-functional intervention team initiates assessment and intervention protocols within one hour. In pilots at several large private universities in North America, this system succeeded in reducing campus suicide rates by over 50%.

Chapter 17: Typical Cases and Model Innovation

17.1 Fuyao University of Science and Technology: A New Exploration of Non-Profit Private Research Universities

Initiated by Cao Dewang, founder of Fuyao Glass Industry Group, Fuyao University of Science and Technology was approved for establishment in 2024 and began enrolling students in 2025. Positioned as “high-level, small but elite, internationalized, and non-profit,” this private university focuses on cutting-edge engineering fields such as materials science, intelligent manufacturing, and electronic information, aiming to cultivate top-tier talent capable of solving “bottleneck” engineering technology problems. The university adopts a deep industry-education integration model, with enterprises deeply involved in curriculum design and students entering enterprise projects from their first year. Its non-profit status ensures that all revenues are reinvested into education itself. Although still in its start-up phase, the philosophy of Fuyao University of Science and Technology provides an important reference for the transformation of China’s private higher education from scale expansion to quality enhancement.

17.2 A Light-Asset Model of Globalized Education

In Singapore, a representative private business school (referred to here without direct naming for discretion) operates a light-asset, multi-campus collaborative model with globally accredited programs, offering bachelor’s and master’s degrees in Southeast Asia, the Middle East, and Africa. Its core competitiveness lies in its flexible “online + offline” blended model and a network of multinational corporate partnerships, enabling students to study across campuses in different countries. The institution does not pursue large-scale campuses but instead provides teaching spaces through partnerships with local entities, achieving rapid expansion and risk diversification. This model offers a replicable example for the cross-border operations of private business schools in the era of globalization.

17.3 China’s Policy of “Roughly Equal Ratio Between Vocational and General Education” and the Rise of Private Higher Vocational Colleges

China has long adhered to the policy orientation of “maintaining a roughly equal ratio between vocational and general education at the senior secondary level.” The revised Vocational Education Law of the People’s Republic of China in 2022 further clarified the equal legal status of vocational education alongside general education. In 2025, within China’s higher education stage, students in higher vocational colleges accounted for approximately 50% of total higher education enrollment. Within this structure, private higher vocational colleges have played a critically important absorption role. According to statistics, students in China’s private higher vocational colleges account for over 40% of all vocational college students, exceeding 50% in some provinces. Private vocational colleges in cities such as Guangzhou and Shenzhen have demonstrated the unique value of the private sector in vocational education through their rapid

curriculum iteration capabilities in areas such as digital skills, new energy technology, and cross-border e-commerce. A stable pool of prospective students, preferential government funding, and strong enterprise demand for skilled talent jointly constitute a strategic opportunity for private higher vocational education.

Chapter 18: Conclusions and Action Recommendations

Looking back from 2026, global private higher education has evolved from a supplement to public provision into one of the main forces. It has carried the dreams of 134.2 million people, provided a ladder of upward mobility for first-generation university students, and demonstrated extraordinary agility amidst technological transformation. Yet the spread of academic misconduct, loopholes in financial governance, and the trampling of the right to education by war all remind us: growth does not equal progress, and scale does not equal quality.

IAPUC issues the following action proposals to the global private higher education community:

Make Integrity the Cornerstone. Every private institution must treat academic integrity as an inviolable institutional red line, establish independent and empowered oversight systems, and implement a zero-tolerance policy toward misconduct and corruption. Incorporate academic integrity education as compulsory content for all students.

Place Students at the Center. Tuition pricing and financial aid policies must ensure that economically disadvantaged students are not shut out because of poverty. When institutions close or restructure, there must be robust mechanisms to guarantee student placements and tuition refunds. Incorporate student satisfaction and graduate employment quality as core indicators in institutional performance assessments.

Treat Quality as Lifeblood. Resist excessive commercialization that sacrifices teaching quality. Invest in faculty development, learning support, and infrastructure, and establish transparent systems for assessing learning outcomes. Online education is not synonymous with low-cost delivery, and the bottom line of educational dignity must be upheld.

Make Peace a Responsibility. The global network of private higher education should serve as a bridge for peace. IAPUC calls on peers worldwide to work together to protect educational facilities in conflict and to raise their voices for every young person deprived of the right to education. We will continue to document war crimes and hold perpetrators historically accountable.

Use Innovation as an Engine. Continue to explore cutting-edge domains such as human-AI collaborative teaching, online blended models, micro-credential systems, and competency-based education, but it must always be grounded in educational principles and bounded by ethical safeguards. Technological innovation must not become an amplifier of educational inequity.

Take Transparency as the Guiding Principle. Every private institution should regularly publish annual reports audited by independent third parties, disclosing financial data, academic output, employment outcomes, and ESG performance. Sunshine is the best disinfectant, and transparency is the only path to rebuilding public trust.

The year 2025/2026 for global private higher education was a year interwoven with hope and scars, a year where achievements and crises coexisted. IAPUC will, as always, lead the sector toward a fairer, more resilient, and more sustainable tomorrow with a posture that balances independence, transparency, critique, and constructive engagement.

The flame of education will not be extinguished by shellfire, nor will it lose its radiance because of corruption. It burns in the eyes of every student who refuses to give up, and it beats in the chest of every teacher who stands fast at the lectern. This report is written for them.

Appendices

Appendix A: Key Definitions and Classification Criteria

Private University: A higher education institution controlled by a non-governmental entity, granting bachelor's degrees and above, with independent legal person status.

Private College: An institution primarily focused on undergraduate teaching and short-term certificate programs, some of which may grant associate degrees, with emphasis on the teaching function.

Higher Vocational College: A higher education institution delivering occupational skills programs within a national qualifications framework, oriented toward employment.

Online Private Higher Education Institution: A registered institution that delivers higher education programs entirely or primarily online and holds relevant educational accreditation.

FTE Student: The number of students converted to a full-time equivalent basis according to study load.

Appendix B: Data Sources and Quality Control

Data for this report are sourced from the IAPUC Global Private Higher Education Data Consortium (G-PHEDC) census questionnaire, statistical databases of national education ministries, UNESCO-UIS, OECD, World Bank, Scopus, Web of Science, national patent offices, LinkedIn employment data, and third-party audit reports. All data have been reviewed by the IAPUC Research Ethics Committee and subjected to rigorous anonymization. Imputed data used multiple imputation methods, with bias controlled within $\pm 3\%$.

Appendix C: IAPUC Academic Integrity Risk Index (AIRI)

AIRI is calculated based on 12 indicators: academic misconduct case rate, completeness of whistleblower protection policy, financial transparency, conflict-of-interest management, third-party audit coverage, board independence, degree of academic freedom protection, timeliness of student complaint handling, paper retraction rate, research fund audit coverage rate, faculty academic integrity training coverage rate, and completeness of public information disclosure. Scores range from 0 to 100, with scores below 40 classified as the high-risk zone.

Appendix D: List of Participating Institutions (Partial)

(Due to space limitations, the complete list is available on the IAPUC official website: www.iapuc.org/census2025)

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