

THE SHAPE OF GLOBAL HIGHER EDUCATION: UNDERSTANDING THE ASEAN REGION

Volume 3



International
Higher Education

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The ASEAN region has a strong commitment to education development at all levels and to further social and economic integration.

Contents

Acknowledgements	2
Foreword	3
Chapter 1: Introduction	4
Chapter 2: Key findings	5
Chapter 3: Aims, objectives and methodology	6
3.1 Aim and objectives of the study	6
3.2 The National Policies Framework	6
3.3 Key findings from <i>The Shape of Global Higher Education</i> (volumes 1 and 2)	7
Chapter 4: Higher education in the ASEAN region	8
4.1 Higher education participation in the ASEAN region	8
4.2 Higher education provision	9
4.3 The pan-ASEAN infrastructure	10
Chapter 5: Understanding international higher education in the ASEAN region – findings and discussions	11
5.1 Openness of higher education systems and support for the international mobility of students, researchers, academic programmes and university research	13
5.3 Quality assurance of higher education provision (domestic and overseas) and recognition of international qualifications	16
5.4 Equitable access and sustainable development policies	20
Chapter 6: Emerging themes	24
6.1 IHE policy commitments are embedded in existing policies	24
6.2 Student mobility is shaped by wider socio-economic forces	24
6.3 Pan-ASEAN collaboration is key – especially in quality assurance	24
6.4 Addressing ‘potential brain drain’ is a key concern	25
6.5 Commitment to research collaboration is high	25
Conclusion: Is there an ASEAN-centric approach to IHE?	26
Appendix: Structure of the National Policies Framework	27

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Foreword

The British Council is very pleased to be able to present to you the latest in our 'Shape of global higher education' research series.

We initiated this study in 2016, devising a framework by which the national higher education policies in various countries could be assessed and compared against each other.

Higher education can be a powerful player in international cultural relations and diplomacy:

- mobile students, staff and researchers share their intelligence, talent and ideas as they move, and develop deep and wide international networks
- creation and delivery of academic programmes across two or more locations relies on, and strengthens, cross cultural co-operation
- international research collaboration can fuse the strengths and expertise of diverse and dispersed researchers to present global solutions to global challenges.

And it is our intention that this study can in some way support the growth of international higher education. By building a greater knowledge and understanding of national higher education systems, The Shape of Global Higher Education can benefit and inform the work of individual higher education institutions as well as national policymakers. Indeed the research series (and the accompanying online Global Gauge of higher education policy), has already been accessed and utilised by national policymakers in many countries, and has informed the decision making and internationalisation strategies of several higher education institutions.

This latest volume is exciting for a number of reasons:

- a. We have focused on ASEAN member states. This is a vibrant and dynamic world region with increasing intra-regional student mobility, several TNE hub countries, and increasing within-region research partnerships and collaboration. For institutions within the region we hope to be able to provide crucial information to support further regional activities; and for institutions outside of the region, this study could provide crucial insight to support interaction with, and profile within the region.
- b. Five of the ASEAN countries were already included in volume 1 of this study, so we now have an opportunity to judge how and whether national systems and policies have changed at all over the last two years.
- c. This presents an opportunity to look at the strengths and challenges of working as a region: competing and collaborating with neighbouring states.
- d. In a change from previous volumes, this research was undertaken by colleagues embedded in the region: the Centre for Higher Education Research (CHER) at Sunway University, Kuala Lumpur, Malaysia and National Higher Education Research Institute (IPPTN), hosted by Universiti Sains Malaysia; and drew heavily on their network of experts in the ASEAN region.

We trust that this will prove to be a valuable resource to support further international higher education engagement within and outside the ASEAN region.

But this is just one approach to assessing and benchmarking national higher education systems and policies. We know that it has already proved useful, and trust that it will continue to do so, however, we also know that this approach is not absolute, and is not above criticism – it is just one way to look at the international higher education world.

Michael Peak, Head of Higher Education Systems Research, Education Policy Unit, British Council

Chapter 1: Introduction

The period since the late 20th century has been described as the 'era of higher education internationalisation' as global student flows have increased and cross-border collaborations have expanded.¹ In the early 21st century, however, as the political landscape across the world changes, there are challenges to international collaboration across all social and economic dimensions.² Ensuring that the internationalisation in higher education can continue to grow and diversify in this context requires in-depth understanding of the policy environment of international higher education (IHE) in the different regions of the world.

This study, building on earlier work by the British Council using its National Policies Framework, examines national countries' policies and how they relate to IHE in the ten nations in the ASEAN region. ASEAN is one of the fastest-growing regions of the world, with a combined population of over 620 million and an economy of over \$2.6 trillion.³ The ASEAN region also has a strong commitment to education development at all levels and to further social and economic integration.⁴ It is a timely point to explore the prospective future for IHE in the region.

In undertaking the study, a mixed methodological approach was undertaken through engagement of country experts and consultation with British Council representatives, as well as an index-based country scoring analysis. The British Council National Policies Framework was used, which is made up of 37 qualitative indicators. All of the data collected as part of this study can be viewed via our online, interactive tool.⁵ It builds on two previous reports produced by the British Council in the Shape of Global Higher Education series. The rationale was to ensure that data collected is comprehensive, up to date, consistent with the prior studies and reflective of the higher education policy environment in each country.

Notes for readers:

1. Labelling of country measurements

The research team worked to ensure that the measurements of HE policy taken as part of this study were comparable to previous work in this series. This includes applying the same 'scoring levels' as used in earlier volumes, namely that:

- scores from 0 to less than 2.5 are labelled as systems which offer 'very low' levels of support for engagement
- scores from 2.5 to less than 5.0 are labelled as systems which offer 'low' levels of support for engagement
- scores from 5.0 to less than 7.5 are labelled as systems which offer 'high' levels of support for engagement

- scores from 7.5 to less than 10 are labelled as systems which offer 'very high' levels of support for engagement.

In this study of ASEAN member states it has become apparent that some country scores in certain categories are very similar, but fall on opposite sides of these scoring boundaries. We'd encourage all readers and users of this research to explore the detailed information and justification of measurements which can be accessed in the online, interactive Global Gauge of HE policy (<https://www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/global-gauge>)

2. Country information boxes

We have peppered this report with text boxes highlighting instances of proactive steps being taken by governments and policymakers in each of the ASEAN member states.

Had space permitted we could have included several examples for each country. The absence of any particular example, or absence of a story from a particular country should not be interpreted as a lack of relevant activity in that country.

1. Altbach, PG and de Wit, H (2018) The challenge to higher education internationalization. *University World News* 23 February 2018. Available online at: www.universityworldnews.com/article.php?story=20180220091648602
2. *Ibid.*
3. Cheok, M (2017) Fifty Years On, Southeast Asia Emerges as Global Growth Leader. *Bloomberg Politics* 6 August 2017. Available online at: <https://www.bloomberg.com/news/articles/2017-08-06/fifty-years-on-southeast-asia-emerges-as-global-growth-leader>
4. <http://asean.org/higher-education-in-asean-to-enhance-student-mobility-in-the-region/>
5. The tool can be found here: www.britishcouncil.org/education/ihe/knowledge-centre/global-landscape/global-gauge

Chapter 2: Key findings

1. It is possible to locate IHE in the strategic planning framework for higher education in the majority of ASEAN countries. There are not, however, separate IHE strategies in place. More commonly, the commitment to extending internationalisation sits within the broader higher education planning framework. It sits there in contrasting positions which also reflect the different drivers behind extending IHE within the region.
2. The generation of bilateral agreements/memorandums of understanding with foreign education ministries focusing on different forms of higher education collaboration is widespread in ASEAN, and all countries score well in this area.
3. Collection and publication of data on IHE is inconsistent within ASEAN countries. It is generally better for students than staff – very little data appears to be available on the latter. In some cases where data is collected, it may not be published and its use is not clear.
4. Student mobility is important in ASEAN. It underpins much of the pan-ASEAN IHE alignment efforts and nine of the ten countries score high or very high in this category. There have been concerted efforts to streamline visa procedures across the region to aid student mobility. But student mobility is also something that is tied up with the broader social and political context of each individual country and can only be understood fully with reference to these factors.
5. All of the ASEAN countries already have, or are trying to develop, significant levels of inbound transnational education and are aiming to grow their HE systems. Hence, building relationships with foreign HEIs. But this does not imply that monitoring systems are in place to specifically deal with such providers. For most countries, monitoring is part of the overall system of accreditation and quality assurance that new providers in the country need to comply with.
6. Differences between countries in ASEAN in programme and institutional mobility are significant. While Malaysia and Singapore especially are global leaders in terms of the domestic international provision, it is at very early stages in Myanmar, Lao PDR, Vietnam and Cambodia. With regard to the entry of foreign higher education providers, it appears that links with a domestic partner are important, and in some cases essential.
7. Support for international students in the form of scholarships is less common in the region primarily because countries do not have the funding to do this. Interestingly, the support that does exist tends to focus more on students from ASEAN nations.
8. The displacement of home students by international students is not a significant issue in ASEAN countries, with the notable exception of Singapore. Across the region, there is evidence of policies to support equitable access to higher education from under-represented groups. In Indonesia, for example, it is stated in law that a fifth of the country's student population should come from the lowest socio-economic groups. Targets for equitable access to higher education also exist in Malaysia and Myanmar. But these commitments are separate policies and not connected to any concern over displacement.
9. While displacement might not be a problem for most countries in ASEAN, for some, 'brain drain' is an issue. Malaysia, Cambodia, Brunei, Indonesia and the Philippines have all faced challenges in this area.
10. Language is a sensitive political and cultural issue across ASEAN. The majority of ASEAN countries have more than one working language. Foreign language competence (in particular, competence in English) is perceived as important economically throughout the region. Hence, in every country, in some part of the higher education system elements of educational instruction are delivered in English, and efforts are under way to extend bilingual provision.

Chapter 3: Aims, objectives and methodology

3.1 Aim and objectives of the study

The National Policies Framework for International Engagement was developed by the British Council to advance understanding of how national governments are supporting IHE, and where they could improve such support. It presents a way to compare the policy environments of different countries. Previous studies in this series have attempted to contextualise these comparisons. This study places such contextualisation central to its approach.

The scoring produced by the National Policies Framework is an important guide, but if IHE is to move forward in the ASEAN region, any assessments of the policy work that is under way must be understood in the social and economic context of the nations that make up the region.

The ASEAN region is made up of the countries in Table 1.

Table 1: ASEAN countries

Countries
Brunei
Cambodia
Indonesia
Lao PDR
Malaysia
Myanmar
The Philippines
Singapore
Thailand
Vietnam

3.2 The National Policies Framework

This study used a systematic methodological approach in order to evaluate the national IHE policies of the ASEAN countries. The mixed methodology involved a series of engagements with country experts and consultation with British Council

representatives. The engagement with in-country experts was extremely important for this research in building an accurate and contemporary picture of the policy environment.

The National Policies Framework looks at IHE across three areas (see Table 2 and appendix for details):

- *Openness*: government-level commitment to internationalisation; environment enabling international mobility of students, researchers, academic programmes and university research
- *Quality assurance and recognition*: a regulatory environment to facilitate the international mobility of students, education providers and academic programmes
- *Access and sustainability*: promoting student/academic mobility and international research collaboration; consideration of possible unintended consequences of internationalisation.

These three areas are subdivided into a number of other categories, as shown in Table 2.

Table 2: General structure of the National Policies Framework⁶

Overview: categories and indicators	Weight
1 Openness and mobility	0.33
1.1 IHE strategy	0.25
1.2 Student mobility policies	0.25
1.3 Academic mobility and research policies	0.25
1.4 Programme and provider mobility	0.25
2 Quality assurance and degree recognition	0.33
2.1 International students' quality assurance and admissions	0.33
2.2 Quality assurance of academic programmes	0.33
2.3 Recognition of overseas qualifications	0.33
3 Access and sustainability	0.33
3.1 Student mobility funding	0.33
3.2 Academic mobility and research funding	0.33
3.3 Sustainable development policies	0.33
Total	1.0

3.3 Key findings from *The Shape of Global Higher Education* (volumes 1 and 2)

The first two reports in the series have made a significant contribution to the global knowledge base on IHE. They draw on information from 38 countries from across the world which are very diverse in their levels of economic wealth and their education systems. A key concern for this study will be the extent to which the ASEAN picture, where IHE is concerned, is reflective of that global picture as presented in volumes 1 and 2 of the series. To an extent, this is inevitable as five ASEAN nations feature in these reports. In this study, though, by incorporating the other five ASEAN countries it will be possible to see the regional picture and whether an 'ASEAN-centric' policy approach to IHE exists.

In terms of the previous reports, a positive picture is portrayed of the extent of ASEAN countries' commitment to IHE, as evidenced through national strategies and reforms to higher education legislation. It is notable that Malaysia in particular, but also Vietnam, the Philippines, Indonesia and Thailand compare favourably with countries from across the world in these studies – many of which have significantly higher levels of GDP. The key findings from *The Shape of Global Higher Education* volume 1 are detailed below.

- Student mobility is the policy area which attracted the most support from policymakers.
- Quality assurance of higher education provision emerges as an area of weakness for the countries studied.
- The recognition of transnational education degrees, including those obtained in third countries, requires further development.

- Higher education institutions are the major drivers of IHE in a number of countries.
- Research is becoming a policy preoccupation, driven in part by the growing influence of global university rankings.
- IHE would benefit from greater co-ordination and alignment of national policies.

The 2017 report *The Shape of Global Higher Education: International Mobility of Students, Research and Educational Provision* volume 2 extended the country coverage to 38 countries. But it also turned the focus towards what the IHE global policy environment meant for higher education institutions. The key findings of the volume 2 report build on volume 1 and highlight again the importance of student mobility to IHE.

6. Based on the British Council's Report *The Shape of Global Higher Education: National Policies Framework for International Engagement* (2016).

Chapter 4: Higher education in the ASEAN region

Higher education, and specifically IHE, is perceived as having a major role to play in the formation of a more integrated and aligned ASEAN community.⁷ The *ASEAN Socio-Cultural Community Blueprint 2025*, launched in March 2016, advocated the promotion of ‘an innovative ASEAN approach to higher education’ which will ‘promote greater people-to-people interaction and mobility within and outside ASEAN’.⁸ Pan-regional bodies such as the ASEAN Directorate, the ASEAN University Network and the Southeast Asian Ministers of Education Organization (SEAMEO) is active in building an infrastructure to enable greater integration and alignment. But the countries across the region

are in quite contrasting stages in terms of the development of their higher education systems. Before the results of the study are described in detail, it is important to outline some of these differences.

4.1 Higher education participation in the ASEAN region

The growth of the higher education sector in South-East Asia has been rapid in recent decades. Table 3 shows the growth in overall student numbers together with increases in inbound and outbound students. Five ASEAN countries have gross enrolment ratios of over 30 per cent. This places them

close to or above the global average of 32 per cent and in the top 20 per cent of countries in the world.⁹ There are contrasts, however, as several of the countries are placed well below the global average. The distinctions between countries become even more pronounced where student mobility is concerned. There are nearly 20 times more students studying abroad from Vietnam than from Brunei. Data on numbers of students studying in ASEAN nations from other countries is not universally available. However, the data available shows that Malaysia dwarfs the majority of the other nations – having over 100,000 international students, whereas Brunei and Lao PDR have less than 1,000 combined.

Table 3: Number of local and international students in South-East Asian countries¹⁰

Countries	Number of local students abroad		Number of international students		Gross enrolment ratio	
	Until 2012 ¹¹	Present	Until 2012	Present	Until 2005 ¹²	2016 ¹³
Brunei	–	3,698	372 (2011) ¹⁴	349	15%	32%
Cambodia	–	5,561	–	–	3%	16%
Indonesia	43,000 (2011)	46,232	7,079 (2010)	–	17%	31%
Lao PDR	1,101 (1999)	6,129	827 (2011) ¹⁵	451	8%	17%
Malaysia¹⁶	61,000 (2011)	64,655	86,923	124,133	32%	30%
Myanmar	1,600 ¹⁷	7,582	65 (2010) ¹⁸	–	11% ¹⁹	14%
The Philippines	8,443 (2008)	16,308	2,665 (2008)	–	28%	28%
Singapore	21,000 (2011)	25,057	84,000	80,000 (2014) ²⁰	–	–
Thailand	28,000 (2011)	29,768	10,967 (2007)	12,274	43%	53%
Vietnam	61,000 (2011)	70,328	500 (2011) ²¹	5,624	16%	30%

7. McDermott, D (2017) Towards an ASEAN Higher Education Area. *Higher Education in Southeast Asia and Beyond 2: 5–7*.

8. *Ibid.*

9. More information is available at: <https://data.worldbank.org>

10. The statistics are available at: <http://uis.unesco.org/en/uis-student-flow>

11. OECD (2013) Education Indicators in Focus, 2013/05 (July). Available online at: [https://www.oecd.org/education/skills-beyond-school/EDIF%202013--N%C2%B014%20\(eng\)-Final.pdf](https://www.oecd.org/education/skills-beyond-school/EDIF%202013--N%C2%B014%20(eng)-Final.pdf)

12. UNESCO EFA Global Monitoring Report (2008) *Regional overview: East Asia*. Available online at: <https://en.unesco.org/gem-report/sites/gem-report/files/157274E.pdf>

13. Republic of the Philippines Commission on Higher Education (2017) Higher Education Facts and Figures. Available online at: <http://ched.gov.ph/2017-higher-education-facts-figures>

14. SHARE (2016) Degree Structures in the ASEAN Region: State of Play Report February 2016. Available online at: <http://share-asean.eu/sites/default/files/Degree-Structures-in-the-ASEAN-Region.pdf>

4.2. Higher education provision

As higher education participation has expanded throughout the region, so the higher education sector in each ASEAN nation has increased in size.

By 2014, there were approximately 7,000 higher education institutions in South-East Asia, with Indonesia, the Philippines and Vietnam being

the three countries with the highest numbers.²² A particular feature of this expansion has been the growth in private provision. Important as this is in understanding ASEAN higher education per se, it has specific resonance in the IHE context. In several of the countries studied, regulatory frameworks treat in a similar way those offering higher education in the country from abroad

and private providers. Asia overall has over 40 per cent of its students enrolled in private institutions. Indonesia and the Philippines feature in the top ten countries globally in terms of private enrolments.²³ Table 4 shows that while the numbers of providers naturally differ greatly across the region, private providers have a presence in all ASEAN nations.

Table 4: Number of public and private higher education institutions in South-East Asian countries²⁴

Countries	Number of public higher education institutions		Number of private higher education institutions	
	2010–12	2015–17	2010–12	2015–17
Brunei ²⁵	4	6	–	6
Cambodia	38	54	46	72
Indonesia	83	81	2,818	2,431
Lao PDR ²⁶	22	85	31	83
Malaysia	20	20	500	599
Myanmar	171 ²⁷	169	–	35 ²⁸
The Philippines ²⁹	220	231	1,636	1,712
Singapore	5	9	47	30
Thailand	98	66	73	455
Vietnam	187	64	29	305

Note: Branch campuses of foreign universities were grouped under private higher education institutions.

15. *Ibid.*

16. <https://www.iie.org/Research-and-Insights/Project-Atlas/Explore-Data/Malaysia>

17. British Council (2014) *Burmese Days: Managing risk and preparing for opportunity in the last education frontier*. SIEM Conference. 10 December 2014. Available online at: <https://drive.google.com/file/d/0B0HnfradPo3RSzhOdkttSGFqSmd0ZW1MLUdmMzdQVXFNwNV/view>

18. SHARE (2016) *Op. cit.*

19. OECD (2007) *Cross-border Tertiary Education: A way towards capacity development*. Available online at: http://siteresources.worldbank.org/EDUCATION/Resources/cross_border_tertiary_education_Eng.pdf

20. Available online at: www.worldcitiescultureforum.com/data/number-of-international-students-studying-in-the-city

21. Pham, H (2011) VIETNAM: Struggling to attract international students. *University World News* 18 December 2011. Available online at: www.universityworldnews.com/article.php?story=2011121617161637

22. Yonezawa, A, Kitamura, Y, Meerman, A and Kuroda, K (eds) (2014) *Emerging International Dimensions in East Asian Higher Education*. Dordrecht: Springer.

23. Bothwell, E (2018) One in three students globally now in private higher education. *Times Higher Education* 1 March 2018. Available online at: <https://www.timeshighereducation.com/news/one-three-students-globally-now-private-higher-education>

24. Republic of the Philippines Commission on Higher Education (2017). Available online at: <http://ched.gov.ph/2017-higher-education-facts-figures/>

25. For 2012: <https://www.cdri.org.kh/publication-page-old/pub/wp/wp86e.pdf>; for 2016: Education and Sustainability: Paradigms, Policies and Practices in Asia, Merrill et al. (2017).

26. <http://ched.gov.ph/wp-content/uploads/2017/12/6.-ASEAN-Status-of-Gender-Mainstreaming-Lao-PDR.pdf>

27. Page 10 National Education Strategic Plan 2016–21. Available online at: www.moe-st.gov.mm/wp-content/uploads/2018/01/NESP_20Summary_20-20English_20-20Final_20-20Feb_2023.pdf

28. Private training centres. Source: <https://www.export.gov/apex/article?id=Burma-Education>

29. *Ibid.*

4.3. The pan-ASEAN infrastructure

There are a number of agencies active in the development of the pan-ASEAN higher education community, of which several were consulted in the production of this research. The two organisations with the greatest direct responsibility for IHE are the ASEAN Secretariat³⁰ and SEAMEO (although UNESCO is active as well in fostering the environment in which educational collaboration can occur).

SEAMEO Regional Centre for Higher Education (RIHED) operates the ASEAN International Mobility for Students (AIMS) programme, which co-ordinates student exchange among universities in ASEAN. This programme has been running since 2011 and involves nearly 70 universities across the region in over ten study fields. It has supported over 2,000 students. The programme includes Malaysia, Thailand, Indonesia, Brunei and Singapore, and is hoping to extend to the other ASEAN nations.³¹

Key to the AIMS programme is the concept of 'balanced mobility'. Participating governments identify appropriate higher education institutions under defined fields of study. Then, the number of inbound and outbound exchange students is mutually agreed on so as to determine a balance.³²

Also active in enabling internationalisation of higher education in the region are networks of higher education providers – in particular the ASEAN University Network (AUN) and Association of Pacific Rim Universities, as well as the Asia–Europe Foundation, which is building links between higher education in ASEAN and Europe. The AUN has developed an ASEAN Credit Transfer System, which is a common framework for assessing applications for student exchange among member universities.³³ This structure, however, is applicable only to the 30 member universities which are mainly large and relatively research-intensive.

ASEAN as a community has been working with other regions across the world in the development of IHE. The most notable example is with the European Community via the SHARE project.³⁴ SHARE aims to strengthen regional co-operation and enhance the quality, regional competitiveness and internationalisation of ASEAN higher education institutions and students. It is running from 2015 to 2018. It includes actions to inform student mobility, policy dialogues and work in quality assurance and credit transfer. The ASEAN Secretariat itself is a key strategic enabler of cross-region collaboration, and this includes the area of IHE. Since the early 2010s, the ASEAN Secretariat have been taking forward the goal of creating a 'common space for higher education' in ASEAN, modelled on the alignments in European higher education developed via the Bologna Process.³⁵

30. More information on the work of the Secretariat is available online at: <http://asean.org/asean/asean-secretariat>

31. More information on the work of SEAMEO is available online at: www.seameo.org/SEAMEOWeb2

32. McDermott, D (2017) *Op. cit.*

33. More information on the AUN ACTS is available online at: www.aunsec.org/aunacts.php

34. More information on the EU Share Project is available online at: www.share-asean.eu

35. Sirat, M, Azman, N and Abu Bakar, A (2014) Towards harmonization of higher education in Southeast Asia. *Inside Higher Ed* 13 April 2014. Available online at: <https://www.insidehighered.com/blogs/globalhighered/towards-harmonization-higher-education-southeast-asia>

Chapter 5: Understanding international higher education in the ASEAN region – findings and discussions

Across all ASEAN countries, there is evidence of policy commitment in the area of IHE. ASEAN nations also compare favourably overall to other countries from across the world where data is available. Table 5 includes the ten ASEAN countries alongside the other 21 who have been assessed in the previous reports in the series.

It is important to emphasise that in Table 5 and those which follow, a low

score does not mean this country does not want to engage with IHE. It reflects the stage at which they are in the development of this work at that point in time.

Given what was found in these reports it is not surprising to see Malaysia and Singapore in particular, and then Vietnam, Indonesia, Thailand and the Philippines scoring well across all the three categories in the National Policies

Framework. There is also a robust commitment to IHE in Singapore. These countries, while not all being the ones with the largest higher education systems in ASEAN, are those whose systems are generally the most developed across the core domains in higher education of learning/teaching and research. They also benefit from governments who, in relative terms, are most able to invest in higher education.

Table 5: Overview of the National Policies Framework and countries' scores (rating indicates the level of support for IHE engagement provided by national systems)

Countries	Overall score	Openness	Quality assurance and recognition	Access and sustainability
Australia	Very high	Very high	Very high	High
Bangladesh	Low	Low	Very low	Low
Botswana	Low	High	Low	Low
Brazil	Low	High	Very low	High
Brunei	High	High	High	High
Cambodia	Low	High	High	Low
Chile	Low	Low	Very low	High
China	High	Very high	Low	Very high
Colombia	Low	Low	Very low	Very high
Egypt	Low	Low	Low	High
Ethiopia	Very low	Low	Very low	Very low
France	Very high	Very high	High	Very high
Germany	Very high	Very high	Very high	Very high
Ghana	Low	Low	Low	Low
Greece	High	High	Low	Very high
Hong Kong	Very high	Very high	Very high	Very high
India	High	High	Low	High
Indonesia	High	High	Low	Very high
Iran	Low	Low	Very low	High
Israel	High	Very high	High	High

Table 5: continued

Countries	Overall score	Openness	Quality assurance and recognition	Access and sustainability
Kazakhstan	High	Low	Low	High
Kenya	Low	High	Low	Low
Lao PDR	Low	High	Low	Low
Malaysia	Very high	Very high	Very high	Very high
Mexico	Low	Very low	Very low	High
Myanmar	Low	Low	Low	Low
Netherlands	Very high	Very high	Very high	Very high
Nigeria	Low	Low	Very low	Low
Oman	High	Very high	High	High
Pakistan	High	High	Low	High
Peru	Low	High	Very low	High
The Philippines	High	High	High	High
Russia	High	High	Low	High
Saudi Arabia	High	High	High	High
Singapore	High	High	High	Very high
South Africa	Low	High	High	Low
Sri Lanka	High	High	Low	High
Thailand	High	Very high	High	Very high
Turkey	High	High	Low	Very high
United Arab Emirates	Very high	Very high	Very high	High
United Kingdom	Very high	Very high	Very high	High
United States	High	High	Low	High
Vietnam	High	High	Very high	High

Scores for non-ASEAN countries have been taken from volumes 1 and 2 of the British Council report series *The shape of global higher education* (2016, 2017)

5.1 Openness of higher education systems and support for the international mobility of students, researchers, academic programmes and university research

This section considers national strategies on IHE and support for the inbound and outbound mobility of

students, academics, academic programmes and collaborative research. It consists of four sub-categories:

- presence of international education strategy
- student mobility
- academic mobility
- institutional and programme mobility.

Table 6 presents the results overall in this category.

Table 6: Government systems supporting openness for IHE in ASEAN countries

Countries	Score	Rating
Brunei	5.0	High
Cambodia	5.2	High
Indonesia	6.5	High
Lao PDR	5.5	High
Malaysia	8.0	Very high
Myanmar	4.2	Low
The Philippines	6.0	High
Singapore	7.0	High
Thailand	8.0	Very high
Vietnam	7.5	High

Key:

Average scores for all categories are graded on a scale of 0 to 10. Maximum score of 10 indicates criteria are fully met and a minimum score of 0 indicates criteria are not met.

The scores are labelled in four levels:
 Very high: for a weighted average score from 7.5 to 10
 High: for a weighted average score from 5.0 to less than 7.5

Low: for a weighted average score from 2.5 to less than 5.0
 Very low: for a weighted average score from 0 to less than 2.5

5.1.1 The presence of an IHE strategy

Criteria used in this section include:

- national IHE strategy
- a dedicated body tasked with promotion of IHE
- an overseas presence
- bilateral and multilateral agreements over the past five years
- data collection and monitoring of internationalisation.

It is possible to locate IHE in the strategic planning framework for higher education in the majority of ASEAN countries. There is not a separate IHE strategy, though. More commonly, the commitment to extending internationalisation sits within the broader HE planning framework. It sits there in contrasting ways though, also reflecting the different drivers behind extending IHE within the region. For example, in Brunei and Malaysia, government has played a strong role in grounding the IHE agenda in their broader foreign policy ambitions. The Malaysian government has formulated three well-planned education blueprints in order to pursue the idea of becoming an 'education hub' in the region: Malaysian Education Blueprint 2013–2025; the National Higher Education Action Plan (NHEAP) 2007–2010 and the National Higher Education Strategic Plan (NHESP) Beyond 2020. The plans were specifically developed to position Malaysia as a hub for higher education in the region and worldwide, and to accelerate the inflow of international students into the country.

IHE and the Cambodia Higher Education Road Map 2030

The IHE strategy for Cambodia is embedded in the *Cambodian Higher Education Road Map 2030 and Beyond*, produced by the Ministry of Education, Youth and Sport (MoEYS). This enables IHE to be linked with other policy areas and strategies including the Rectangular Strategy for Growth, Employment, Equity and Efficiency Phase III (2013–18), Cambodia National Strategic Development Plans 2014–2018, the country's National Socio-Economic Development Plan (2014–18) and Industrial Development Policy (2015–30), and MoEYS's five-year Educational Strategic Plan 2014–18.

By contrast, in Thailand, Indonesia and the Philippines, although the presence of IHE strategy is clear, it is seen more as a means to increase national competitiveness, rather than to achieve specific targets. For example, Indonesia's National Education Strategic Plan and the Higher Education Long Term Strategic 2003–2010 aims to contribute to national competitiveness as well as to counter possible negative effects of globalisation. In Cambodia, Lao PDR, Malaysia and Brunei the commitment to IHE is becoming stronger as their higher education planning frameworks evolve, as in the case of Cambodia (see box above).

The Myanmar government are very encouraging of, and open to supporting IHE. In Myanmar's National Education Strategic Plan (2016–21), there are explicit targets related to:

- faculty training including reference to work overseas
- rectors attending overseas study tours
- alignment with international standards.

In terms of bodies to support IHE in ASEAN, in all countries it is the responsibility of a relevant education ministry to take IHE forward. Within these ministries, separate entities do exist in the majority of countries who have a remit for IHE. For example, in Thailand, the Bureau of International Cooperation operates under the Office of the Commission for Higher Education. It is tasked with co-ordination of bilateral and multilateral cooperation in IHE. The Accreditation Committee of Cambodia and Directorate General of Higher Education (Higher Education Department), under the supervision of the Ministry of Education, Youth and Sport (MoEYS), have played very significant roles in promoting the internationalisation of higher education in Cambodia. The work of the International Affairs Staff (IAS) in the Philippines is described in the box opposite.

The International Affairs Staff in the Philippines

Within the Commission on Higher Education (CHED) the International Affairs Staff (IAS) has an overall responsibility for co-ordinating and harmonising all the international dimensions of CHED's work. IAS is organised into three units: the Educational Agreements and International Recognition Unit; the Trade in Education Services Unit; and the Protocol Affairs Unit. In collaboration with the Department of Foreign Affairs, IAS strengthens international co-operation by joining international and regional bodies/networks, negotiating and facilitating bilateral/multilateral agreements on academic collaboration and linkages of local higher education institutions (HEIs) with their counterparts in other countries as well as with international organisations.

International partnership making in Lao PDR

MOES is very proactive in the development of international partnerships – often via the Department of External Relations. The Ministry has signed various types of bilateral agreements/MoUs with 20 countries, including Australia, China, US, Switzerland, Hungary, Korea, Vietnam and Thailand. The MOES also encourages public HEIs to sign MoU/MoA with universities abroad. According to the External Relations Department's Report, as of 2017, a total of 211 MoU/MoA were in place at four universities and around 20 MoU/MoA for the government colleges.

5.2.2 Student mobility

The first Shape of Global Higher Education report found that student mobility was 'the key component of most countries' national strategies'. It is undoubtedly the case that student mobility is important in ASEAN. As illustrated above, it underpins much of the pan-ASEAN IHE alignment efforts, with nine of the ten countries scoring in the high or very high category. There have been concerted efforts to streamline visa procedures across the region. But student mobility is also something that is tied up with broader social and political contexts and thus each country places their own distinctive view on it. Singapore, for instance, had a very-high-profile public policy commitment to increase international students to 150,000 foreign students by 2015 via its Global Schoolhouse Project.³⁶ They stepped away from this target in 2011 and restricted international students as the issue of achieving the right balance between international and home students became a more pronounced political issue. In Vietnam, Lao PDR and Cambodia, the common values of their political regimes are shaping policies on student mobility. While in Myanmar, bolstering the procedures to encourage student mobility is part of the broader process of opening up the country to the international community.

Finally for this section, the collection and publication of data on IHE is inconsistent within ASEAN countries. It is generally better for students than staff – very little data appears to be available on the latter. In some cases, data may be collected but not published, and its use is not clear. For example, in the Philippines there is a dedicated space on the website for collaborative provision between local HEIs and overseas institutions, however the data is not yet publicly available through this portal.

Where there is greater variability across the region is in overseas presence. Malaysia and Singapore are very proactive in this area, and Vietnam is in the process of placing dedicated staff with an IHE remit in embassies in a number of countries. In the remaining countries, there is less systematic overseas presence at present. However, such variability does not suggest insularity. The generation of bilateral agreements/MoUs with foreign education ministries which aim to enhance collaboration in IHE is pervasive in ASEAN, and all countries score highly here. The box above right illustrates the work of Lao PDR in this area.

36. Tan, E (2016) 'Singapore as a Global Schoolhouse: A Critical Review', In Mok, K (ed) *Managing International Connectivity, Diversity of Learning and Changing Labour Markets: East Asian Perspectives*, Springer.

5.2.3 Academic mobility and research collaboration

This category draws on the following criteria: (i) streamlined academic visas; (ii) visa procedures for academics; (iii) the living and working environment for academics; and (iv) the inclusion of international research in national research assessment for the purpose of funding.

The majority of ASEAN countries have some form of proactive approach to engendering international research collaborations. The box below describes the work of NAFOSTED in Vietnam.

National Foundation for Science and Technology Development (NAFOSTED) in Vietnam³⁷

NAFOSTED funds basic research carried out by Vietnamese universities in social sciences and humanities and natural sciences. In addition, NAFOSTED has a strong focus on supporting international engagement of Vietnamese institutions and researchers, including hosting and participation in international conferences and training of researchers overseas.

IHE only features in a minority of national research assessment reviews. However, there is clear evidence of policy action in Indonesia. While no policy is without cost or barriers to implementation, it does appear that what Indonesia is doing is potentially replicable across ASEAN countries.

As yet, less evidence of policies to actively support academic mobility through preferential visa policies or working opportunities exist in the ASEAN region. The paucity of activity

here was also found across the wider group of countries featured in the first Shape of Global Higher Education report.

Recognising IHE research in Indonesia³⁸

This is a part of the greater effort from the government to support research capacity building and international research collaborations. Greater weight is allocated on academics publishing in international journals (40 points) compared with domestically published research (10 points). International research collaboration is strongly encouraged and there is a comprehensive list of recent initiatives on the State Ministry of Research and Technology website.

5.2.4 Programme and institutional mobility

The criteria considered in this category are: (i) scope for foreign education institutions to set up teaching and research entities; (ii) provision of cross-border programmes; (iii) clarity and application of regulations for foreign institutions; and (iv) scope for domestic higher education institutions to set up independent teaching and research entities overseas.

This is one of the areas of the study where the differences between countries in ASEAN are the greatest. While Malaysia and Singapore especially are global leaders in terms of domestic international provision, it is at very early stages of development in Myanmar and Lao PDR. With regard to the entry of foreign higher education providers, it appears that linkages with a domestic partner are important, and

in some cases essential. Foreign higher education providers can establish a commercial presence in the Philippines, but only in partnership with a local institution. In Malaysia and Singapore, the creation of any new entities is regulated under private higher education laws.

5.3 Quality assurance of higher education provision (domestic and overseas) and recognition of international qualifications

This section studies the regulatory environment and its relationship to countries' IHE strategies. It considers the following categories:

- quality assurance of international students
- quality assurance of programme and provider mobility
- recognition of international qualifications.

The development of improved quality assurance frameworks for higher education is a priority in the ASEAN region. The ASEAN Quality Assurance Network (AQAN) came into being in 2007 and is a network of quality assurance authorities in the ten ASEAN nations which shares good practice and collaborates on capacity building aspiring to develop a regional quality assurance framework for South-East Asia. It has produced the ASEAN Quality Assurance Framework (ASQAF) to try and develop better practice in quality assurance across the region.³⁹

The extent to which quality assurance (QA) structures are tailored to account for IHE, though, is quite variable. The findings echo to an extent the conclusion reached from the first Shape of Global Higher Education

37. For more information on the work of NAFOSTED please go to: www.nafosted.gov.vn/en/

38. For more information please go to: <https://dfat.gov.au/about-us/publications/Documents/building-indonesian-research-capacity-aust-universities.pdf>

39. For more information please go to: <http://share-asean.eu/sites/default/files/AQAF.pdf>

report, i.e. that those countries with a significant amount of transnational activity have better developed approaches in this regard. This rather suggests that specific QA for IHE is something that follows the

development of a significant amount of activity, rather than preceding it. The policy challenge in this regard is knowing how to place QA in a more proactive rather than reactive position in the trajectory of IHE policy

development. Table 7 shows that of the three categories used in the National Policy Framework, the greatest variation between countries is found in this area.

Table 7: National quality assurance frameworks, and degree recognition policies in ASEAN countries, in support of international engagement

Countries	Score	Rating
Brunei	6.0	High
Cambodia	5.5	High
Indonesia	3.5	Low
Lao PDR	3.0	Low
Malaysia	8.0	Very high
Myanmar	1.5	Very low
The Philippines	5.8	High
Singapore	5.5	High
Thailand	5.0	High
Vietnam	7.5	Very high

Key:

Average scores for all categories are graded on a scale between 0 and 10. Maximum score of 10 indicates criteria is fully met and a minimum score of 0 indicates criteria is not met.

The scores are labelled in four levels:
 Very high: for a weighted average score from 7.5 to 10
 High: for a weighted average score from 5.0 to less than 7.5

Low: for a weighted average score from 2.5 to less than 5.0
 Very low: for a weighted average score from 0 to less than 2.5

5.3.1 Quality assurance of international students

This sub-category uses the following criteria: (i) entry and selection criteria for international students; (ii) code of practice for teaching and assessing international students; and (iii) policies and guidelines for engaging with recruitment agents.

The approaches taken by ASEAN nations to quality assurance will inevitably be contrasting as the numbers of inbound and outbound students vary so greatly across the region. However, this is not to say that the systems in place here and their strength at this point in time are a function only of student numbers. Despite Brunei, Cambodia and Vietnam all having relatively low numbers of international students, there is evidence of efforts being made to develop clarity in the entry and selection criteria for international students. Much of this work is being undertaken at the level of higher education institutions themselves in developing their own policies, rather than at the sector-wide level.

In terms of teaching and assessment, with the exception of Malaysia and Vietnam, there is not significant evidence of bespoke guidance focused on international students. The majority of countries in ASEAN are developing their overall QA frameworks and in this process, there are attempts to build in references to international students. This process needs to be informed by the higher education sector itself and not just led by policymakers. Myanmar may be the country in ASEAN at the earliest stage in its development of an IHE policy and regulatory framework, but is an interesting example of how the higher education sector is working collaboratively to build its approach to international student support and IHE work. The box below describes the work of the Myanmar Higher Education Association.

Myanmar Higher Education Association (MHEA)⁴⁰

The MHEA was formed in Myanmar in 2017–18 to support those working on international higher education in Myanmar universities. It is bringing together those from across institutions to develop and share practice in the international education field. It is the product of a training course in international higher education work delivered to representatives of 20 universities over 2016 by the Institute of International Education.

Finally in this sub-section, most countries in ASEAN do not have policies or procedures in place to advise local institutions on how best to engage with international agents for the recruitment of international students. It appears that international agents are not especially active in most countries in the region. In Malaysia though, there is more activity with over 50 per cent of local students studying overseas being recruited through education agents.

5.3.2 Quality assurance of programme and provider mobility

This category draws on the following indicators: (i) monitoring of foreign institutions; (ii) monitoring of domestic institutions overseas; (iii) enforcement action; and (iv) collaboration with regional and international quality assurance agencies.

All ASEAN countries already have developed, or are in the process of developing, significant levels of inbound transnational education (TNE) to help them grow their higher education systems. Hence, they are looking to develop the regulatory infrastructure where foreign higher education institutions are concerned. But this does not imply that monitoring systems are in place to specifically deal with such providers. For most countries monitoring is part of the overall system of accreditation and QA that new providers need to comply with. In Lao PDR for example, there is a set of national QA regulations designed for whole institutions and programmes delivered by both public and private providers, which includes foreign institutions.

40. For more information please go to: <https://www.iie.org/Programs/Myanmar-Higher-Education-Initiative>

At this point in time, there are no plans to set up any specific regulation to monitor the foreign invested institutions/programmes in Lao PDR. There is a recognition though in some ASEAN nations of the need to deal with distance and online learning and the implications of such work for the education of home students. Thailand has been particularly proactive on this point (see box below).

Monitoring distance learning in Thailand⁴¹

The ministry has developed a number of criteria in order to regulate the offer of degree programmes using distance education systems. These are detailed and deal with programme management and staffing, resources, student support, monitoring of student involvement and student identity checks in tests and examinations. There must be adequate provision of learning resources, preparation and orientation of students, and provision of services. The criteria deal with three different delivery modes: use of print media, broadcast and e-learning. Programmes must follow the standard time schedule for higher education programmes and meet the structural requirements of the standard criteria. Details of requirements are included in an Announcement of the Ministry of Education on Criteria for Asking Permission to Offer and Manage Degree programmes in the Distance Education System.

When it comes to domestic institutions working abroad, there is less evidence of policies in place to monitor such activity as ASEAN higher education institutions are not overall working abroad to a large degree. Finally, in this sub-section, across all ASEAN countries there is evidence of collaboration with regional and sub-regional agencies in the field of quality assurance. As an example, the QA agency in Indonesia, the BAN-PT, is a full member of the International Network for Quality Assurance Agencies in Higher Education (INQAAHE), a member of the ASEAN Quality Assurance Network, the Association of the Quality Assurance Agencies of the Islamic World and the Asia-Pacific Quality Network.

5.3.3 Recognition of international qualifications

This section considers national qualification frameworks and practices which streamline international students' access to the country's higher education system by mapping their previous qualifications against local equivalents. The following criteria are considered as part of this sub-category: (i) foreign degree recognition; (ii) recognition of TNE qualifications; (iii) communication with the labour market; and (iv) collaboration with regional and international recognition agencies.

Consistent with the commitment to extending openness to foreign collaboration prevalent in the ASEAN region, there is evidence of efforts to make the recognition of foreign qualifications transparent. Cambodia, Malaysia, Brunei and the Philippines score well here. Interestingly, the recognition of TNE qualifications is not as advanced as that of foreign qualifications, although work is under way to improve this across the region.

In common with the findings of the first Shape of Global Higher Education report, efforts to provide clear and timely information to the labour market and other professional bodies on the comparability of foreign/TNE qualifications are less well developed, and no countries score in the very high category here. In Malaysia, however, details on foreign undergraduate and postgraduate degrees which are recognised for the purpose of appointment in the Malaysian public sector are available on the government website.

As with collaboration with regional/international QA agencies, there is also extensive collaboration with regional/international recognition agencies in the ASEAN region.

41. More information is available online at: www.mua.go.th

5.4 Equitable access and sustainable development policies

This section considers some of the unintended consequences of internationalisation, such as ‘brain drain’ and displacement of students from disadvantaged and vulnerable backgrounds by international students. It also studies policies for sustainable development, such as funding for

inbound and outbound students and academic mobility, and support for international research collaboration. The following categories are considered:

- funding of inbound and outbound student mobility
- funding of inbound and outbound academic mobility and international research collaborations
- sustainable development policies.

Table 8 indicates the extent of policy focus across the region with regard to this theme. Even more so than the previous themes, deeper analysis deconstructing the theme is essential. Most of the questions in this category relate in some way to funding, which is a function of the economic position of the particular country. There is large variation in terms of economic strength across ASEAN, and this shapes how countries engage with this theme.

Table 8: Equitable access and sustainable development of IHE in ASEAN countries

Countries	Score	Rating
Brunei	7.0	High
Cambodia	4.0	Low
Indonesia	8.0	Very high
Lao PDR	4.5	High
Malaysia	7.5	Very high
Myanmar	2.0	Low
The Philippines	5.5	High
Singapore	8.0	Very high
Thailand	8.0	Very high
Vietnam	7.5	High

Key:

Average scores for all categories are graded on a scale between 0 and 10. Maximum score of 10 indicates criteria is fully met and a minimum score of 0 indicates criteria is not met.

The scores are labelled in four levels:
 Very high: for a weighted average score from 7.5 to 10
 High: for a weighted average score from 5.0 to less than 7.5

Low: for a weighted average score from 2.5 to less than 5.0
 Very low: for a weighted average score from 0 to less than 2.5

5.4.1 Funding of inbound and outbound student mobility and international research collaborations

This sub-category adopts a balanced approach towards student mobility in that it places equal importance on inbound and outbound student mobility. It considers the following criteria: (i) outbound scholarships and student loans for study abroad; and (ii) inbound scholarships or loans for international students.

Despite the varying stages of progress in their IHE work, all ASEAN nations have some form of study abroad scholarship programmes, but they vary greatly in size and extent. In Malaysia, Indonesia, Thailand and Vietnam, the government leads the way in terms of scholarships offered. In the other countries, the government has less of an ability to lead and foreign aid plays a bigger role with the aid offered by the state being more targeted at strategic needs. Brunei, for example, has a system of scholarships for local undergraduate and postgraduate students to study at universities overseas, with priority given to programmes that are not available locally such as forestry, agriculture, psychology, law and forensic science.

Support for international students studying in ASEAN countries in the form of scholarships is less widespread. Interestingly, the support that does exist tends to focus more on students from ASEAN nations. In Malaysia, for example, the Malaysian Technical Co-operation Programme (MCTP) ASEAN master's scholarship is aimed at citizens of ASEAN member states.

The Cambodian government offers scholarship for Vietnamese and Laotian students to study Khmer language and engineering. Singapore is very active in this regard via its ASEAN Scholarship Scheme. The ministry provides scholarships for ASEAN and Indian nationals to study at Singaporean institutions, and publicises these on its website.

The ASEAN Scholarship in Singapore⁴²

The ASEAN Scholarships are currently open for applications from the following countries:

- Brunei
- Malaysia
- Thailand
- the Philippines
- Vietnam.

Applications from the following ASEAN countries will open shortly:

- Myanmar
- Cambodia
- Indonesia
- Lao PDR.

As part of the ASEAN community studying in Singapore, they will be given opportunities to broaden their horizons and develop important skills such as leadership, communication and life skills to equip them for the 21st century.

5.4.2 Funding of inbound and outbound academic mobility and international research

This sub-category considers the following indicators: (i) outbound academic programmes; (ii) inbound academic programmes; and (iii) funding of international research collaboration.

As with support for students to study abroad, the support available for academic mobility varies over the region. However, there is a desire to improve the academic capacity of the domestic HE system, and academic staff working abroad is perceived as a mechanism to achieve this – with safeguards in place as described below to ensure that academics return to the home nation. The majority of countries have some form of programme in place to enable academic mobility, or in the case of Myanmar, are working towards such a programme.

Where inbound academic mobility is concerned, there is less activity evident. Again, economic capacity is an issue. Limitations in the ability of ASEAN nations to fund academic mobility does not imply, though, that they are not willing partners in working with each other and those outside the region on international research collaboration. They are not positioned in these relationships as significant funders, with the exception of Malaysia to some extent. But they are devoting resources within their capabilities, and some countries – Malaysia again, Thailand and Vietnam – are taking a strategic approach to partnership development. Singapore is again active in this regard. A-STAR, the national agency for science, technology and research, funds scholarships for post-doctoral training at leading overseas laboratories.

42. For more information please go to: <https://www.moe.gov.sg/admissions/scholarships/asean>

5.4.3 Sustainable development policies

The following criteria are considered in this section: (i) anti-displacement policies; (ii) anti-‘brain drain’ policies; (iii) aid to developing countries and regions; and (iv) foreign language and intercultural competence policies.

The area of sustainable development within the National Policies Framework contains within it some related, but also quite distinct, policy areas. Caution is encouraged when interpreting any form of overall scoring on this item. Across the distinct areas, the engagement of ASEAN countries varies in relation, predictably, to their broader social and economic position.

The displacement of home students by international students is not a significant issue in ASEAN countries, with the notable exception of Singapore where as noted earlier in the report, it has been a significant political issue. Across the region, there is evidence of policies to support equitable access to higher education from under-represented groups, e.g. in Indonesia it is stated in law that a fifth of the country’s student population should come from the lowest socio-economic groups. Equitable access to higher education is a priority in the National Education Strategic Plan (NESP) 2016–2021 in Myanmar. But these commitments are separate policies and are not connected to any concern over displacement.

While anti-displacement might not be a problem for most countries in ASEAN, for some, ‘brain drain’ is an issue. Malaysia, Cambodia, Brunei, Indonesia and the Philippines have all had challenges in this regard. It is also a concern for Myanmar and anti-‘brain drain’ policies feature heavily in the NESP. Malaysia has been attempting to address this issue since the early 2010s, and its approach is described in the box below.

Malaysia and TalentCorp⁴³

In 2011, the Malaysian government established TalentCorp, an agency working to formulate and facilitate initiatives to address the availability of talent in line with the needs of the country’s economic transformation. Among other things, TalentCorp engages with Malaysians abroad and partners with local employers to raise awareness on the professional opportunities available in the country with a view to facilitate the return of highly skilled Malaysian professionals into Malaysia’s key economic sectors. It does so, for example, by running the Global Malaysians Job Board, a platform for Malaysian diaspora professionals looking for jobs in Malaysia. TalentCorp also manages the Returning Expert Programme, a scheme offering attractive living and financial incentives as an effort to support the creation of the ‘right setting’ for returning Malaysians wishing to settle back in the country.

The issue of aid and sustainability in the context of IHE takes on a particular meaning in ASEAN. Some countries are developing their roles as donors as well as recipients of aid, while for others, they are the beneficiaries of support. Thailand, Malaysia, Vietnam, Indonesia and to an extent Brunei, are all moving to becoming donor countries. Singapore via its work with ASEAN partners offers technical assistance to other countries related to IHE.

Finally, language is a sensitive political and cultural issue across ASEAN. The majority of ASEAN countries have more than one working language. Foreign language competence, in particular competence in English, is perceived as important economically. Hence, in every country’s activities to some extent, educational instruction is delivered in English, and efforts are under way to extend bilingual provision. The work in Brunei is described in the box opposite.

43. For more information please go to: <https://www.talentcorp.com.my/our-work/student-graduate>

Promoting second language competence and intercultural awareness in Brunei

Brunei remains strongly committed to its bilingual policy whereby the country has adopted an education system that uses two languages, neither of which is indigenous to Brunei – Standard Malay and English.

Brunei is developing its education sector through global co-operation for promoting English language competence and intercultural awareness. As an example, the Brunei–US English Language Enrichment Programme for ASEAN was initiated between Brunei and the US. It is co-operatively administered by UBD and the East-West Centre in Hawaii, aiming to strengthen ASEAN integration through building English language capacity, promoting greater awareness of the rich cultural diversity, and facilitating communication between teacher trainers, officers and diplomats of the region.



IHE is at an exciting point in the ASEAN region.

There are opportunities for IHE to make a tangible contribution to both the development of higher education systems and to ASEAN itself.

Chapter 6: Emerging themes

This section outlines five themes emerging from the study. While they relate to specific parts of the national policy framework study, they also cut across the separate sections.

6.1 IHE policy commitments are embedded in existing policies

There is an ongoing debate around how to develop more autonomy for higher education providers in the ASEAN context.⁴⁴ The variations in autonomy imply that government policy frameworks and strategies take on an important role. Hence, understanding how IHE is positioned in the education policy framework of an individual ASEAN nation is crucial. The survey suggests that separate IHE strategies are not common. Rather, strategies are embedded within existing frameworks and linked to a country's socio-economic priorities. However, this should not necessarily be seen as disadvantageous for IHE, in comparison to a scenario where a separate IHE strategy in each country exists. The integration of IHE into a system-wide approach can enable the establishment of linkages to other streams of work, securing IHE within broader strategies related to education on the one hand, and international relations on the other.

6.2 Student mobility is shaped by wider socio-economic forces

The first Shape of Higher Education report emphasised the key role that student mobility plays in underpinning IHE policies. Student mobility is extremely important as well in ASEAN, but it does not underpin IHE in every country (at least not yet), and the nature of student mobility is shaped by broader forces. Malaysia and Singapore are in the top 20 countries in the world for incoming international students, with students entering from across the region and outside. Education and specifically IHE is tied closely with how these countries see themselves. But for Cambodia, Vietnam and Lao PDR, the priority is to construct relationships within ASEAN, and with countries with which they share values and customs. Enhancing the visa process to enable freer flow of students and creating opportunities for post-study employment are the mechanics of student mobility. It is important to understand such processes. But such mobility is also part of a broader process of cultural development as ASEAN seeks to define and identify itself in the early 21st century.

6.3 Pan-ASEAN collaboration is key – especially in quality assurance

The differences between the countries does not mean that they are not engaged in extensive collaboration with other ASEAN nations, especially in the area of quality assurance. This is as an area where exchange of knowledge and practice is relatively prevalent, and ASEAN benefits from organisations such as the ASEAN Secretariat, SEAMEO and AUN who are actively promoting regional collaboration and alignment in this area.

The primary challenge in this regard though, for all countries with the probable exception of Singapore, is the development of quality assurance systems that can enable expansion of their whole system. Quality assurance is a common challenge when countries are trying to expand their systems within resource constraints.

44. Ratanawijitrasin, S (2015) 'The Evolving Landscape of South-East Asian Higher Education and the Challenges of Governance', in Curaj, A, Matei, L, Pricopie, R, Salmi, J and Scott, P (eds) *The European Higher Education Area*. Springer.

6.4 Addressing ‘potential brain drain’ is a key concern

IHE is not a neutral space. There are differences in capacity, size and power across higher education systems. As a region, ASEAN is attempting to grow and develop higher education individually and collectively. Understandably, there are anxieties from ASEAN nations regarding the impact of expansion of IHE on their internal capacities if it leads to more academic staff moving abroad and not returning. Such anxieties have been identified in other areas of the world where growth of higher education systems is occurring.⁴⁵ Liberalisation of visa and other policies to attract other academics into the country to counterbalance the outward mobility may only have limited impact when institutions in the country do not yet have the capacity (or ‘prestige’) to attract such staff. Moreover, the development of capacity and prestige takes time. Hence, the efforts that countries across the region are making to ensure well-qualified nationals return home is noticeable. Alongside such efforts however, international research collaborations can have a role.

6.5 Commitment to research collaboration is high

The desire to develop higher education systems across the ASEAN region is evident in the commitment throughout the region to building research collaboration with those outside and within ASEAN. But the ability to do this effectively is not distributed equally both between and within countries. Malaysia, Thailand, Vietnam, the Philippines and Singapore have dedicated units to further such collaborations, while in the other ASEAN countries, such infrastructures are not yet in place. It is the case in all the countries though, that research collaborations tend to be led by particular institutions which have the necessary capacity originating from their histories and/or size. The leading role these relatively more prestigious universities play is usually supported by policymakers. The importance of having one or more world-class universities in a country appears to be an idea that has been bought into by ASEAN education policymakers, along with the importance of university rankings.⁴⁶ The implications for IHE need to be considered carefully. An

approach to international research collaboration that prioritises the development of a small number of universities that will rank highly in particular global ranking systems may inevitably come at the expense of the development of international research collaborations across the whole of the higher education system.

45. Jowi, J, Knight, J and Sehoole, C (2013) ‘Internationalisation of African Higher Education: Status, Challenges and Issues’, in Sehoole, C and Knight, J (eds) *Internationalisation of African Higher Education*. Available online at: <https://www.sensepublishers.com/media/1739-internationalisation-of-african-higher-education.pdf>

46. QS Asia New Network (2018) New initiative for Indonesian higher education toward world-class status. QS *WOWNEWS* 1 January 2018. Available online at: <http://qswownews.com/new-initiative-indonesian-higher-education-toward-world-class-status/>

Conclusion: Is there an ASEAN-centric approach to IHE?

This study has shown that to a significant extent, policy approaches to IHE in ASEAN are characterised by diversity as much as commonality. It is possible, though, in the midst of this diversity, to discern an ASEAN-centric approach to IHE that is distinctive to the region. The five themes described above form the basis of such an approach. They are not unique, but taken together, they cast ASEAN in its own distinctive light where IHE policy is concerned.

This ASEAN-centric approach places academic capacity building as central to IHE policy as student mobility. While student mobility may be the building block of IHE across the world, as argued in the first Shape of Global Higher Education report, in the ASEAN region it has to share this foundational role with academic capacity building. It could even be argued that to a considerable extent, it is the building of this capacity which will unlock greater student mobility. Policymakers in ASEAN can and are taking steps to introduce more student-friendly visa policies. But these will not necessarily translate into greater mobility until there is the physical and human infrastructure in place to both allow more students to enter and prepare more suitably qualified students to leave.

Acknowledging that there is a distinctive ASEAN-centric approach has implications for how understanding IHE across the world should evolve. The logical future step for global research utilising the National Policy Framework is to continue to build a more nuanced picture of IHE by region. In so doing though, the global gauge tool may have to evolve. One could argue that measuring 'access and sustainability' in particular in a region like ASEAN requires a greater appreciation of the realities regarding supporting inbound mobility and providing scholarships than the present framework allows.

In understanding this ASEAN-centric approach, future research will be needed. Such work must include improving the collection, dissemination and analysis of data on international student and faculty mobility, programme and provider mobility, and research collaboration at the national level. It is essential that future policy developments in IHE globally are data-driven, and the initial report in this series suggested that there is room for improvement in this regard. ASEAN nations working through the pan-regional bodies in the region could take a global lead in this area.

The second area of research required is on the nature and extent of memoranda of understanding and bilateral agreements within and outside the region. A complex map of such collaborations is developing. Knowing the patterns of these relationships could be hugely beneficial in showing ASEAN nations how to develop the partnerships which are vital to international higher education.

This study suggests that IHE is at an exciting point in the ASEAN region. There are opportunities for IHE to make a tangible contribution to both the development of higher education systems in the region and to ASEAN itself. The challenge now is to realise these opportunities.

Appendix: Structure of the National Policies Framework

1 Openness and mobility	
1.1 IHE strategy	
Internationalisation strategy	Has the ministry of education (or equivalent) produced a detailed international higher education strategy (e.g. covering student mobility, research collaboration, development goals)?
Dedicated body	Is there a dedicated body (or bodies) promoting the internationalisation of higher education?
Overseas presence	Does the ministry of education or dedicated internationalisation body have a significant overseas presence, e.g. by way of overseas representative offices or participation in conferences, trade fairs and marketing events?
Bilateral agreements	Over the past five years, has the government made efforts to sustain or increase the number of bilateral agreements/memoranda of understanding signed between itself and foreign education ministries on the topic of collaboration in higher education?
Data collection and monitoring of internationalisation	Does the government monitor and produce data on the internationalisation of its higher education system, e.g. by producing data on international student and faculty mobility, programme and provider mobility, and research collaboration?
1.2 Student mobility policies	
Student visas	Do restrictions exist on foreign students and researchers to obtaining entry visas, e.g. depending on country of origin?
Visa procedures for international students	Are procedures for foreign students to obtain visas clear, transparent and consistent?
Living/working environment for international students	Do policies exist to make it easier for foreign students to come and live in the country, such as concerning employment (including post-study employment opportunities) or bringing spouses?
Fees for foreign students	Do public institutions have the authority to charge different fees to foreign students?
1.3 Academic mobility and research policies	
Academic visas	Are there any special regulations in place to make it easier for foreign teaching faculty and researchers to gain employment?
Visa procedures for academics	Are procedures for foreign teaching faculty and researchers to obtain visas clear, transparent and consistent?
Living/working environment for academics	Do policies exist to make it easier for foreign faculty and researchers to come and live in the country, such as concerning employment or bringing spouses?
Inclusion of international research in national assessment/review	Is research produced via international collaboration included in the national research assessment/review?
1.4 Programme and provider mobility	
Setting up operations by foreign institutions	Can foreign institutions set up their own legally recognised teaching/research entities?
Cross border programme provision	Do regulations exist to allow for the provision of cross-border programmes by foreign providers, e.g. by way of twinning, programme articulations and distance learning?
Clarity and application of regulations for foreign institutions	Are legal regulations for foreign institutions clear, transparent and evenly enforced?
Domestic institutions abroad	Are public domestic institutions permitted to set up legally recognised teaching/research entities abroad?

2 Quality assurance and degree recognition

2.1 International students' quality assurance and admissions

Entry/selection criteria for international students	Are education institutions provided with timely information, support and guidance by academic recognition bodies (or other bodies) to help select appropriately qualified foreign students for entry?
Code of practice for teaching/assessing international students	Are there national bodies or other systems in place to monitor, revise and advise on institutions' procedures for teaching and assessing foreign students, e.g. by way of best practice surveys, advisory bodies or networks?
Policies/guidelines for engagement with recruitment agents: at home and overseas	Are there policies or procedures in place to advise local institutions on how best to engage with international agents for the recruitment of international students? This area includes framework of engagement, guidelines and code of conduct related to the country's HEIs engagement with agents based overseas and/or, equally, national-level oversight of education agents active in the respective country.

2.2 Quality assurance of academic programmes

Monitoring of foreign institutions	Do national quality assurance agencies regularly monitor, and if appropriate, accredit the cross-border activities of foreign institutions (e.g. distance learning, programme collaboration, branch campuses) in the home country of the quality assurance agency?
Monitoring of domestic institutions overseas	Do national quality assurance agencies advise, monitor and accredit the cross-border activities of domestic institutions (e.g. distance learning, programme collaboration, branch campuses)?
Enforcement action	Are national quality assurance agencies active at enforcing their standards and requirements, either for foreign institutions, domestic institutions overseas, or both if appropriate?
Collaboration with regional/international QA agencies	Do national quality assurance agencies take an active part in international collaboration on quality assurance standards, e.g. by adopting the UNESCO/Council of Europe Code of Good Practice in the Provision of Transnational Education and by taking part in regional and international networks?

2.3 Recognition of overseas qualifications

Foreign degree recognition	Is the process taken by national academic recognition bodies in recognising foreign qualifications clear, transparent, and consistent?
Recognition of TNE qualifications	Do national academic recognition bodies make efforts to recognise TNE qualifications, e.g. by way of guidelines or TNE code of good practice?
Communication with labour market	Do national academic recognition bodies work to provide clear and timely information to the labour market and other professional bodies on the comparability of foreign/TNE qualifications?
Collaboration with regional/international recognition agencies	Do national academic recognition bodies take an active part in attempts to improve recognition procedures across borders, e.g. by signing up to UNESCO regional conventions; the Bologna Process, and, where appropriate, by establishing bilateral agreements on degree recognition?

3 Access and sustainability	
3.1 Student mobility funding	
Outbound scholarships/access to student loans for study abroad	Do scholarship programmes for studying abroad exist, are they well-publicised and are they available at all levels of study?
Inbound scholarships/access to student loans for international students	Do scholarship programmes for foreign students exist, are they well-publicised and are they available at all levels of study?
3.2 Academic mobility and research funding	
Outbound academic programmes	Do funding programmes exist for teachers and researchers to undertake posts abroad?
Inbound academic programmes	Do funding programmes exist to allow foreign teachers and researchers to undertake posts in the home country?
Funding of international research collaboration	Do funding programmes exist to promote international collaboration in research ... addressing issues of global importance ... agreements between national and foreign funding bodies?
3.3 Sustainable development policies	
Anti-displacement policies	Does the state actively seek to avoid the displacement of low-income or marginalised domestic students by foreign students, e.g. by way of quotas, grants or scholarships?
Anti brain drain policies	Does the government actively seek to counteract brain drain by attracting outbound students and scholars to return home, e.g. by offering employment or by linking return to funding?
Aid to developing countries and regions	Does the government engage in development projects to support capacity building in international higher education either at home or abroad, e.g. by offering grants to students from low-income countries/regions or by investing in technical capacity-building projects?
Foreign language and intercultural competence policies	Does the government have policies in place to promote second-language competence and intercultural awareness?

