

Going Global Legacy Programme

---

# Horizons 2025

ASEAN Higher Education Insights from  
Going Global 2018 and beyond

October 2019



**This report was produced for the British Council by Guy Perring, Regional Director i-graduate Asia, and commissioned as a part of the Going Global Legacy: Horizons 2025 programme.**

With Going Global 2018 (Malaysia) being hosted for the first time in an Association of Southeast Asian Nations (ASEAN) member state, the purpose of this report is to capture the key priority areas for higher education (HE) in the ASEAN region, through analysis, discussions and interviews with ASEAN higher education policy influencers and leaders. These recommendations will provide a basis for further debate and discussions, leading on to more targeted interventions which are responsive to ASEAN regional priorities, draw on regional strengths and facilitate mutually beneficial collaborations between the ASEAN and the UK higher education sectors.

## **Acknowledgements**

This report acknowledges the analytic contributions of key regional and country-based education leads from the British Council as well as leaders from Ministries, government and regional organisations as well as higher education institutions in ASEAN, East Asia and the UK.

### Disclaimer

This report contains information from a range of sources, including the British Council country teams, individual contributors and public domain information. While the British Council makes every effort to ensure that the information provided in the report is accurate and up to date, the British Council makes no warranty (whether express or implied) and accepts no responsibility for the accuracy or completeness of the report.

---

## FOREWORD

Going Global is a conference for leaders of international education to debate the future of further and higher education (HE). With the theme “Global connections, local impact: Creating 21st century skills, knowledge and impact for society-wide good”, Going Global was hosted for the first time in an Association of Southeast Asian Nations (ASEAN) member state, Malaysia, in 2018.

Over 1000 leaders from around the world attended Going Global 2018 in Kuala Lumpur, organised by the British Council and co-hosted by the then Ministry of Higher Education Malaysia, with support from the ASEAN Secretariat. The Going Global 2018 conference provided both an opportunity to the UK sector to access ASEAN education markets in one of the fastest developing regions of the world and also to understand the dynamics of how ASEAN countries operate in relation to each other. During the plenaries as well as the breakfast and parallel sessions, the delegates heard the views of ministers, government officials, and university leaders on the challenges facing higher education in the fourth industrial revolution. Panellists stressed the importance of ‘collaboration, balance and impact’ when building the future of ASEAN Higher Education, in a Ministerial Session that considered how to ensure sustainable and equitable partnership opportunities in HE across the region.

Going Global 2018 thus presented an excellent opportunity to deepen ASEAN regional collaboration in International Higher Education Policy themes. Following on from these discussions, the British Council organised a forum for ASEAN ministerial representatives and thought leaders: ‘Higher Education Horizons 2025: New Agendas for Internationalisation in ASEAN’, with a focus to support ASEAN’s higher education future internationalisation. This event brought together key stakeholders from Ministries of Education, higher education leaders and stakeholders in the ASEAN and broader East Asia region to share and discuss internationalisation strategies for the near future, and to promote regional and UK collaborations in Higher Education through knowledge exchange and sharing of best practices. This led into the next Going Global in Berlin in 2019, with the theme “Knowledge diplomacy and the digital world: does international tertiary education have a role?”. At the ASEAN Breakfast Session during this conference, five senior representatives from the Ministries of Education in Malaysia, Indonesia, Thailand, Myanmar and Vietnam, together with an international audience of higher education leaders, explored the priority areas to strengthen ASEAN’s higher education internationalisation agenda towards 2025, with particular emphasis on the response to future higher education trends at national and regional levels.

This report documents the discussions at Going Global 2018 and captures the key future trends for higher education as well as the implications of this on the internationalisation agenda in ASEAN. Moving forward to 2019 and beyond, we hope this report will inform higher education policy makers and university leaders, and spur opportunities to deepen UK-ASEAN collaborations in higher education towards 2025.

Susan Milner, Director Education East Asia,  
May 2019.

---

## INTRODUCTION

This policy paper evolved from discussions with the British Council in ensuring that Going Global 2018<sup>1</sup> gathered some momentum post-event and continued to create impact across the ASEAN region.

Too often international education conferences can end up with a series of separate insights and conversations, which may lead to individual partnerships or collaborations, but rarely in sustained high-level engagement. In the case of Going Global 2018 (Kuala Lumpur), it was the first time it has been held in S.E. Asia and, consequently, it seemed important that some overall ASEAN regional based action was determined as well as potentially a series of internal dialogues leading to the Going Global Berlin 2019. With the next Going Global held in Europe, it was important that the ASEAN views and impact were well-represented allowing the delegates to get a clear picture of the strength and diversity of the region as well as the likely trajectories for Higher Education in the future.

This report includes views and data from all the relevant Going Global sessions, as well as pre-conference sessions. In addition, this policy paper evolved from a series of side conversations with leading players, as well as interviews with relevant British Council education leads across the region.

As with the majority of international education conferences the theme of the conference was broad enough to attract a wide range of delegates and relevant stakeholders but is perhaps unique with its global focus on high-level engagement from Ministers and Vice-Chancellors albeit with an inevitable UK tinge given the organisers own mission and remit.

Out of themes of Going Global that emerged for ASEAN and in the subsequent forum, the key future trends have been highlighted that will have key impact and resonance across the region.

---

<sup>1</sup> Going Global is the conference for leaders in international education to debate the future of higher and further education. Since 2004 Going Global has grown from a biennial event in the UK to an annual event alternating between the UK and major international cities. 2018 was the first time in the ASEAN region, hosted in Kuala Lumpur.

---

# KEY FUTURES FOR ASEAN HIGHER EDUCATION TOWARDS 2025

1. Institutions and national governments will need to look across ASEAN for collaboration in research and mobility as a first choice.
2. Transnational education will evolve with new forms (based on technological innovations) and country specific needs.
3. The private sector will have greater involvement and there will be more support for internationalisation from national governments.
4. Institutions will become more responsive to industry needs and will ensure better communication and collaboration with industry.
5. The skills mismatch between graduates and industry needs will be addressed, and remain a top priority up to and beyond 2025
6. Institutions will become nimbler with the breakdown of traditional structures and hierarchies that currently stifle innovation.
7. Regional bodies will collaborate and will pull limited resources with an increased focus on capacity building across the region.
8. The student voice will emerge as a key enabler across the region with governments and institutions listening to students to shape curriculum, influence the methods of learning and ensure employability
9. Institutions across the region will increasingly face accountability for outcomes of learning, from their students and wider stakeholders.
10. Unbundling of credentials will grow rapidly with increase in online provision with MOOCs, short courses and blended learning surpassing traditional degree enrollment.

# OVERVIEW OF HIGHER EDUCATION IN THE ASEAN REGION

The timing, theme and location of Going Global 2018 was eminently suitable in a world that is only really just beginning to recognise the importance of ASEAN to world-wide stability and understanding. As was stressed throughout the conference in various forums, the ASEAN region is astonishing for its relative peace since its establishment as a political entity in 1967, the size of its population 650 million and its incredible diversity in terms of religion, economic and social development. Indonesia has 40% of the population of ASEAN whilst Brunei only 0.07%. and GDP per capita varies enormously with Singapore at US\$52,888 per head and Cambodia at US\$1,144<sup>2</sup>. Over its 50-year existence ASEAN has grown from an economy of US\$95billion (1970) to US\$2.5 trillion<sup>3</sup>. This compares with the European Union which has a GDP of around US\$18.8 trillion<sup>4</sup>. It should be noted that the EU secretariat which has a budget of US\$159 billion<sup>5</sup> whilst the annual budget of the ASEAN secretariat is a mere US\$20 million. <sup>6</sup>

## Key Data Set across ASEAN nations

| Countries in ASEAN     | Population | GDP per capita US\$ | Gross Enrolment Ratio | Number of Public Institutions | Number of Private Institutions | Local Students Abroad | International Students |
|------------------------|------------|---------------------|-----------------------|-------------------------------|--------------------------------|-----------------------|------------------------|
| <b>Brunei</b>          | 437        | 30,993              | 32%                   | 6                             | 6                              | 3,698                 | 349                    |
| <b>Cambodia</b>        | 15,087     | 1,144               | 16%                   | 54                            | 72                             | 5,561                 |                        |
| <b>Indonesia</b>       | 254,156    | 3,362               | 31%                   | 81                            | 2,431                          | 46,232                |                        |
| <b>Lao PDR</b>         | 6,666      | 1,787               | 17%                   | 85                            | 83                             | 6,129                 | 451                    |
| <b>Malaysia</b>        | 30,916     | 9,501               | 30%                   | 20                            | 599                            | 64,655                | 124,133                |
| <b>Myanmar</b>         | 50,305     | 1,212               | 14%                   | 169                           | 35                             | 7,582                 |                        |
| <b>The Philippines</b> | 101,938    | 3,002               | 28%                   | 231                           | 1,712                          | 16,308                |                        |
| <b>Singapore</b>       | 5,498      | 52,888              | N/A                   | 9                             | 30                             | 25,057                | c.80,000               |
| <b>Thailand</b>        | 72,306     | 5,742               | 53%                   | 66                            | 455                            | 29,768                | 12,274                 |
| <b>Vietnam</b>         | 93,823     | 2,088               | 30%                   | 64                            | 305                            | 70,328                | 5,624                  |

Data drawn from British Council's The Shape of Global Higher Education: Understanding the ASEAN region and World Bank statistics.

The region is also at various stages of development in Higher Education with some nations such as Myanmar emerging from over 50 years of isolation and consequently experiencing

<sup>2</sup> Data drawn from World Bank and ASEAN data

<https://data.worldbank.org/indicator/NY.GDP.PCAP.CD?locations=Z4-8S-Z7>

[https://asean.org/?static\\_post=asean-statistical-yearbook-2016-2017](https://asean.org/?static_post=asean-statistical-yearbook-2016-2017)

<sup>3</sup> <https://theaseanpost.com/article/asean-50-regions-pride>

<sup>4</sup>

<https://ec.europa.eu/eurostat/tgm/refreshTableAction.do?sessionId=9ea7d07e30dd3bf0a52b9a8a474c872db039e243c026.e340aN8Pc3mMc40Lc3aMaNyTa3eQe0?tab=table&plugin=1&pcode=tec00001&language=en>

<sup>5</sup> <https://www.consilium.europa.eu/en/general-secretariat/staff-budget/>

<sup>6</sup> <https://www.thejakartapost.com/seasia/2017/11/25/no-reforms-for-asean-anytime-soon.html>

---

massive shifts both politically and economically, others such as Laos and Cambodia moving forward after a relatively low economic base, and countries such as Indonesia and the Philippines tackling the connected issues of increasing access to higher education along with maintaining & enhancing quality in both the public and private sectors.

All ASEAN countries have higher education strategic plans in some form which as will be seen emphasize many of the same themes such as ensuring **the creation of employable graduates, increasing research capacity, improving overall quality and responding effectively to Industry 4.0.**

ASEAN itself publishes its own overarching strategic plans which hope to distil some of these country level initiatives into a regional approach with more of a focus on access, equity and sustainability and stressing the various initiatives that encourage staff and student mobility such as the ASEAN University Network (AUN) or the ASEAN International Mobility for Students (AIMS) programme under the Southeast Asian Ministers of Education Organisation (SEAMEO).

## **THE SHAPE OF GLOBAL HIGHER EDUCATION: UNDERSTANDING THE ASEAN REGION (VOLUME 3)**

The Shape of Global Higher Education: Understanding the ASEAN Region (Volume 3) was launched during a pre-conference masterclass at the Going Global conference in Kuala Lumpur, Malaysia. The report provides an excellent overview of the national education systems of countries within ASEAN in relation to international higher education policy. Specifically, the report highlights that the ASEAN region is becoming more open for international engagement, and that there is an ASEAN-centric approach to international higher education that is distinctive to the region despite the diversity of policies adopted by different countries.

The report focusses on the themes of *openness to internationalisation* (mobility of students, staff, research and academic programmes), *quality assurance and recognition* (in relation to international mobility) and *access and sustainability*.

The report also highlights the significance of the ASEAN Socio-Cultural Community Blueprint 2025 which advocates an 'innovative ASEAN approach to higher education' and sees intra-ASEAN mobility as a key goal.

Key concluding points that emerged from both the report and the masterclass at the Going Global 2018 conference were that:

- Internationalisation issues are often embedded in existing country strategic plans
- Mobility across the region is seen as a key driver towards integration
- Pan-Asian collaboration in quality assurance systems are a key for successful integration

- 
- The appetite for research collaboration across ASEAN by leading universities is high with an acceptance that differing stages of economic and social development can cause issues.
  - By opening up the systems and allowing for greater integration, this increases the risk of brain drain both within and outside ASEAN.

A proposed next stage of analysis as discussed at the pre-conference masterclass would be an analysis of the successful implementation or not of those policies.

## GOING GLOBAL THEMES

The overarching theme of the Going Global 2018 conference was ‘Global Connections, local impact: creating 21<sup>st</sup> skills, knowledge and impact for society-wide good.’

Within this theme, the Going Global 2018 conference explored and debated the role of international tertiary education through the following sub-themes and related questions:

### 1. New skills, new graduates

- How do we ensure graduates have the right skills to contribute to societal growth and cultural understanding as well as economic growth?
- What is the role of language in teaching, research and career prospects?
- Can we develop global citizens alongside strong national identities and a commitment to local engagement?
- Can the skills gap between higher education and industry be bridged to deliver both economic and social good?

### 1. Social mobility and international mobility

- What national level initiatives work best to provide the conditions for social equity and inclusion?
- How can international mobility support social mobility – and is there evidence that it does?
- How do institutions’ global connections support international mobility to drive social mobility?

### 2. Demonstrating impact

- How do universities drive national or regional economic and social impact? What evidence is there, and should they be asked to do more?
- How can we balance global connections, national interest and academic autonomy?
- Higher education institutions are major knowledge producers. How do we ensure that this knowledge delivers impact for society?

---

### 3. Future-proofing Higher Education Institution (HEI) systems

- To meet future challenges, higher education systems and institutions must have long-term sustainability – so how can higher education leaders and policy makers ensure this? Who pays?
- How can they ensure that systems and institutions deliver impact for societies of the future?
- What leadership skills and resources do institution and policy leaders need to build the HEIs of the future?

### 4. New models of delivery

- What are the new frontiers of tertiary education?
- Are there new delivery models that will disrupt and invigorate the global HE ecosystem - and what potential do these have to build and benefit societies of the future?
- Who will the future deliverers be?

Sub-themes for ASEAN included developing national systems that are responsive to the future needs of students, employers and communities and the emphasis on the societal obligations of institutions and their impact in the surrounding city or region.

Other important themes of facilitating and encouraging international student mobility and the focus on social equity and inclusion led to debates on global citizenship and the dangers of higher education creating global elites.

Additionally, with many ASEAN nations now looking at the need to respond to the fourth industrial revolution (expressed as 4.0 in many national strategies) there was a clear focus on new models of teaching and learning to impart 21<sup>st</sup> Century skills to learners.

## EMERGING THEMES FOR ASEAN AT GOING GLOBAL

**Global/Local** - The challenge of managing the competing strands of being both global and local was a key theme expressed in the conference throughout and the opening plenary explored these tensions. Subsequent discussions looked at how to be locally relevant and how institutions should identify local problems first and then look for appropriate global partners. The challenge was addressed in many of the sessions and as one session speaker stated there is a desire to 'burst out of our international bubble' and impact change within our local communities.

**Prioritisation of rankings** - There was at times a view expressed that the prevalence of rankings across the ASEAN region has been at the expense of local engagement. The role of rankings played across the conference at times and it was clear that it drives much government

---

level strategy and institutional aims. A number of speakers were concerned the performance of how poorly some ASEAN countries in the various rankings' tables. The rankings do not take account of HEI local engagement, with many institutions outside the research-led rankings doing the 'heavy lifting' within their communities and regions.

**The latest digital innovations** in teaching and learning with explorations of virtual reality and artificial intelligence were central to many discussions on innovation and meeting the digital challenges ahead. Prof Fon Sim from Nottingham University Malaysia's campus stated that 'greater use of the enabling environment in digital learning technology will be the driving force in realising the potential and opportunities in transnational education'.

Dr Mohamed Amin Embi (Chief Information Officer) at Universiti Kebangsaan Malaysia) saw the need to redesign learning spaces, creating a fluid & organic curriculum and employing the latest technology.

Technology was seen as a 'key to social mobility' and across ASEAN there was no fear of enabling technology, according to Dr Ayesha Khanna, a digital entrepreneur from Singapore.

**International students** in ASEAN were seen as benefitting the local community in terms of diversity, understanding and learning new cultures.

Debates around **inequality and inclusion** were key to a number of the sessions. Without consistent monitoring and interventions, Higher Education may be perceived as a generator of inequality. However, there is also the potential for new modes and models of delivery to broaden access.

A focus on the **Sustainable Development Goals (SDGs)** and the link between education and the achievement of those 17 goals in ASEAN was also debated. Dr Sayed Azan Ali from Nottingham University Malaysia stated that 'Education is not only a key goal addressed in the SDGs but is also the enabler or catalyst for all the SDGs'.

## REGIONAL BODIES

ASEAN has several organisations or bodies that are active across the 10 countries and many of these were well represented at Going Global 2018. The conference highlighted some of their roles and higher education initiatives in the region.

**The ASEAN Secretariat's** basic function is to provide for greater efficiency in the coordination of ASEAN organs and for more effective implementation of ASEAN projects and activities. The ASEAN Secretariat's role is to initiate, facilitate and coordinate ASEAN stakeholder

---

collaboration in realising the purposes and principles of ASEAN as reflected in the ASEAN Charter.

**SEAMEO RIHED** is the South-East Asian Ministers of Education Organization Centre specializing in higher education development. SEAMEO RIHED's mission is to foster efficiency, effectiveness, and harmonization of higher education in Southeast Asia through system research, empowerment, collaboration and development of mechanisms to facilitate sharing in higher education.

Dr. Chantavit Sujatanond (Centre Director of SEAMEO RIHED) explained SEAMEO's role as a 'mediator linking government to universities' with a focus on harmonisation of Higher education across 11 South East Asian countries (note that Timor Leste is in South East Asia, but not as yet a member of ASEAN.) The ASEAN International Mobility for Students (AIMS) Programme has been at the core of SEAMEO RIHED's educational programmes with an overarching goal for self-sufficiency and balanced mobility across the region.

**ASEAN University Network (AUN)** was established in November 1995 leading on from the 4th ASEAN Summit in 1992 which called for ASEAN Member Countries to help "hasten the solidarity and development of a regional identity through the promotion of human resource development so as to further strengthen the existing network of leading universities and institutions of higher learning in the region."

The AUN's strategic focus is to facilitate regional cooperation by strengthening the existing network of cooperation among universities in ASEAN and beyond;

**Asian Development Bank (ADB)** is one of the significant players in the region with similar level of funding to the World Bank in the region around US\$17billion<sup>7</sup>. There is now an increased focus on Higher Education in its programming and ADB's view expressed at the conference was that many countries in the ASEAN region are now either 'middle income or soon to be' and that any further development will need to be led by knowledge and innovation. Any investment by the ADB would therefore need to tie universities more closely to the national economy with a particular focus on STEM and links with the private sector.

**The World Bank** globally spends around US\$12billion on Higher Education. It covers a large scope, but its main focus in ASEAN is on the improvement of teaching and learning with a focus on faculty qualifications, curriculum and the learning environment.<sup>8</sup>

---

<sup>7</sup> <https://www.asiasentinel.com/econ-business/like-aiib-adb-struggles-find-quality-borrowers/>

<sup>8</sup> Going Global presentation by World Bank representatives (2018)

---

## TVET

There is across the ASEAN region much interest in vocational education and common concerns about TVET development and the need for greater recognition of the sector. Many ASEAN country strategic plans emphasize the need to produce quality, work-ready TVET graduates and raise the profile of TVET qualifications with parents.

TVET sessions within the conference shared international expertise in designing effective frameworks and best practice approaches. The ASEAN Secretariat Deputy Secretary-General for Socio-Cultural Community H.E. Vongthep Arthakaivalvatee said that ASEAN is also working to give TVET the recognition it deserves and a special working group has been formed “to push TVET to a higher level within ASEAN”.

## STUDENT VOICE

The Going Global 2018 conference ensured a high level of student voice within sessions featuring many international students including ASEAN student on a plenary panel. The closing plenary featured Yinbo Yu, International Students’ Officer from the National Union of Students in the UK. He stated that young people are determined to change the world and ‘give us a voice and we will surprise you’.

Many students challenged the notion that they should be thought of as passive recipients of education and instead voiced that they wanted to be seen as core partners in the process, with their voices and views shaping curricula, methodology and the overall learning & living environment.

Students expressed the need to have a role in providing an effective feedback mechanism to ensure that the nature of the learning is meeting their needs.

## Recommendations for UK-ASEAN Joint Agendas for Internationalisation

## Recommended Actions

### Focus on best practice in TNE across the region

Transnational education (TNE) was both a key topic at Going Global 2018 and as indicated by many ASEAN speakers forms a part of the Higher Education strategy of many of the developing ASEAN nations. It is also important to be clear on the motivations of ASEAN nations at different stages of HE development in encouraging TNE.

The branch campus model which is an important part of the UK engagement represents a small percentage of the total UK TNE numbers. There were also some very specific motivations in Malaysia for encouraging branch campuses – in order to generate capacity, develop Malaysia as a hub for international students and as a contributor to national income via fee revenue and associated spending.

The emerging models of TNE in ASEAN are far more partnership based and a fruitful area for exploration would be exploring how these models are contributing to overall ASEAN strategies and highlight examples of best practise.

Sustainability of the various models is vital especially when they are not necessarily driven by economic imperatives, but rather meet the emerging needs of the various ASEAN countries.

It should be added that UK is ideally placed to contribute to this since it is the world leader in establishing the various forms of TNE and has decades of best practise in this area. British Council has played a key role in codifying, quantifying and encouraging future collaborations and is ideally placed to showcase best practise and broker new relationships.

In a related development and one that was discussed in the side lines of Going Global it is clear that other countries will attempt to replicate the success of UK TNE. Malaysia already has this both in the public and private sectors.

In addition, the audience of Going Global draws on a significant audience drawn from Africa and India which should perhaps be seen as the next frontier of TNE and where UK and ASEAN best practise would be ideally positioned to present itself as solutions to emulate.

- Showcase ASEAN best practice in transnational education and how it is contributing to growth of HE sectors across the region.
- Position UK as a world-leader in the development of TNE.
- Allow for joint workshops/presentations and collaboration between UK and ASEAN institutions.
- Provide a model for future developments of TNE globally outside ASEAN.

### Benefitting local communities and regions

As can be seen from the previous sections, there was a great deal of discussion about ensuring that universities were responsive to their local and, in some cases, regional needs.

Simon Baker- Data Editor from the Times Higher Education argued that although rhetoric may have shifted to look at this kind of local impact many of the metrics used in the rankings tend to be focused on other aspects of an institution's work such as research and/or numbers of international staff and students.

In researching for this piece, it is clear that the impact on the local community of an HE institution has been an emerging theme in UK HE and there are a number of great examples of responsiveness to local needs across the UK sector. This focus has been also driven by a keen

- Showcase UK best practise in this area and how the model is transferable to an ASEAN context
- Highlight examples across ASEAN of institutional contributions to local and regional economies
- Work across a range of institutions in ASEAN who

|   |  |
|---|--|
| <p>sense that UK institutions need to highlight the value they bring to the wider community.</p> <p>It is less clear if this is a process that has been quantified across the ASEAN region and it would be valuable to take a look at how regional universities are responding to these demands and ensuring they present value to both the nation, the region and the city.</p>  | <p>are firmly embedded in their local communities</p> <ul style="list-style-type: none"> <li>• Within this context, a focus on university/industry partnerships with UK as a model would also be pertinent. (see below)</li> </ul>   |
| <p><b>The Student Voice highlighting mobility across the region and beyond</b></p>  |  |
| <p>As indicated earlier, Going Global saw an unprecedented level of input from students. Without doubt they contributed enormously to the event and were, without exception, articulate and had a clear view on how their needs should be met by both institutions and government.</p> <p>ASEAN students are one of the more mobile groupings globally and provide significant numbers to the UK. There is also increased mobility across the region and a number of sessions highlighted programmes that encouraged this and provided the frameworks and systems to allow this to happen. The flagship EU Share programme was the most prominent and exploring the success of this with the graduates and beneficiaries of the programme would be extremely valuable.</p> <p>The historical context has meant a natural affinity to British education across much of ASEAN both as a model for development and a destination. It is clear that this may be changing as students look at a range of options to ensure a successful future and there is little doubt that in the future online options will finally have an impact.</p> <p>However, it was also clear from Going Global that international students still value an overseas experience be that as a full-time time student, part of a transnational education programme or a study abroad short-term programme.</p> <p>The motivations vary across the region and it would be valuable to compare and contrast the student experience across ASEAN and give a sense of the various motivations that lead to either movement across the region or outside it.</p> | <ul style="list-style-type: none"> <li>• Highlight the dynamism of the ASEAN region in terms of student mobility within and outside the region</li> <li>• Examine policies and drivers in creating environments for enhancing UK-ASEAN and EA student mobility initiatives.</li> <li>• Gain a deeper understanding of the motivations and drivers that influence students on their decision to take part in overseas study.</li> <li>• Highlight areas of pan – ASEAN collaboration such as the AUN network, the AIMS project and the EU share programme.</li> </ul> |
| <p><b>Developing effective and sustainable University/Industry Partnerships</b></p>   |  |
| <p>Going Global speakers and attendees tend to be drawn from the senior ranks of academia and although there was some discussion of partnerships with industry – there was limited participation from industrial partners.</p> <p>However, subsequent discussions with British Council have indicated that this is an emerging theme across the region with a recognition that these partnerships are not well-developed in many ASEAN countries. It</p>  | <ul style="list-style-type: none"> <li>• Explore UK models for potential showcasing in a regional dialogue</li> <li>• Gain a broader knowledge of current university/industry collaboration across</li> </ul>  |



|   |   |
|---|---|
| <p>is an area that as one British Council country lead indicated is an 'undefined space' at present and one which the UK is seen as a leader especially in areas of innovation.</p> <p>There seem to be four key aspects that are being discussed:</p> <ul style="list-style-type: none"><li>• Industry involvement in developing the curriculum</li><li>• Improving employment prospects of student body</li><li>• Develop research capacity and collaboration</li><li>• Transferring knowledge effectively</li></ul> <p>There is clearly the opportunity to look at UK excellence and showcase this across the region. This area ties into the earlier theme of benefitting local communities and regions. A number of UK institutions have strong roots across their region, community and local industries. Warwick being a good example with its links into Jaguar Land Rover and TATA, but there are many more that could be highlighted.</p> | <p>ASEAN highlighting examples of best practice – <i>potential for collaboration with Korea which is world leader in this area (see appendix 1)</i></p> |
|---|---|

---

## ASEAN COUNTRY FOCUS (2019)

*The section below highlights the ASEAN countries with a focus on the tertiary education sector, policy and strategies.*

### The Philippines

Higher education in the Philippines is clearly on a cusp of great change as it emerges from the key decision to switch to K - 12 thereby adding two more years to basic education. This led to a reduction in student numbers for HE institutions and indeed no new enrolment for 2 years

Mitigation measures are in place to ensure income security for institutions, in addition to developmental opportunities for faculty with the opportunity to upgrade the skills and qualifications of academic staff. As Marianne Joy Vital from the Commission on Higher Education (CHED) stated 'the key is to maintain the progress that has already come from the K – 12 programme'.

It should also be noted that unlike much of ASEAN, there are no major issues with an aging population and the Philippines currently has a median population of 23 and no predictions of a significant increase in the future.

There is currently a low intake of international students into HE and this is unlikely to grow in the short or mid-term. However, it should be noted that the Philippines is increasingly seen as a destination for ELT students, especially from Korea and Japan who see it as a low-cost alternative to the UK and Australia.

As with many ASEAN nations there is, perhaps, a pre-occupation with rankings with only 4 local institutions currently in the QS Rankings. However, it does reflect the desire to increase research capacity and the need to increase the number of PhDs in the university system. The focus on ranking should be viewed in the context of country's aspiration to upgrade quality of their HE sector and a desire to enhance internationalisation and industry/university collaboration. Stronger sustainable partnerships with industry and universities are consequently a key priority of the Philippine government and CHED sees this as a way to improve innovation and develop entrepreneurship across HEIs.

Collaboration between the British Council and CHED has been a focused effort to establish sustainable TNE programmes. The motivation is to develop PG programmes which meet gaps in provision, develop capacity of faculty and improve research, but are also disciplines that are important to the national agenda. It is clear from the development of these niche programmes in the form of joint, dual and double degrees with examples such as Disaster management, Big

---

Data, Sustainable Food Systems and Tropical Oceanography that these are very different approaches to predominantly market driven developments of TNE in Malaysia and Singapore.

Current legislation to open up the TNE market further is currently at the Senate level and should provide more incentives for an increase in market-led transnational education opportunities. As indicated both at the conference and in conversations with the British Council, there are significant activities by the ADB who have its headquarters in Manila. For the period 2018 – 2020 their focus is on secondary education with expenditure of around US\$450million.<sup>9</sup>

Whilst HE is not a priority of ADB and other donor bodies, the Philippine government through CHED and Department of Science and Technology (DOST) will continue increasing its focus and investments on internationalisation of HE with an additional focus on research and innovation.

## Thailand

Thailand, as with many countries in the region, is looking at expanding transnational education provision. There have been a number of efforts in the past, but it was clear from the Minister that this is now a more coordinated and structured approach. Transnational education in Thailand has taken time to develop due to regulations and market demand. However, it is increasingly seen as an instrument to increase standards and raise institutions to a global standard. It is to some extent seen as a vehicle to attract foreign students to Thailand.

Thailand, in common with other ASEAN countries also has a focus on the fourth Industrial revolution and similarly has looked at developing a 'Thailand 4.0' to respond to the predicted changes in the workplace and new skills needed by its graduates. However, it is clear that as its Minister, HE Dr Teerakiat Jareonsettasin, stated the 4<sup>th</sup> Industrial revolution is to a large extent predicated on the views of a Western trajectory of progress and the assumptions that each country has gone through the 1<sup>st</sup>, 2<sup>nd</sup> and 3<sup>rd</sup> revolution.

With a refreshing honesty, the Minister expressed the view that although Thailand has gone through a number of education reforms – nothing of substance has been created and, perhaps, there is a need to abandon central planning and evoking the words of Adam Smith 'no big brother can know what is going to change'.

There have been attempts to mainstream TVET and become nimbler to respond to 4.0. Indeed, the Office of the Vocational Education Commission (OVEC) has founded 'an incubation centre to develop entrepreneurial skills to students who will graduate and become entrepreneurs in the

---

<sup>9</sup> Data from Going Global presentation from ADB representatives.  
[www.britishcouncil.org](http://www.britishcouncil.org)

---

future'. However, despite these initiatives, as the Minister stated often Business and Education 'run parallel, but never meet' and bridging the divide is often a challenge.

The Minister also highlighted the development of the Eastern Economic Corridor which as part of the response to 4.0 will create a population surge in its eastern provinces and, therefore, there are plans to create new cities to accommodate more people. These cities will include international quality education (potentially an opportunity for TNE partnerships) and high-quality healthcare. In addition, the any investments in these special economic zones will benefit from reduced corporate taxation, research incentives and tax permits to allow land purchases.

Conversations with British Council Thailand indicate the most significant change may be the plan to create a new Ministry of Higher Education and Science which is not dissimilar to movements in Indonesia and Vietnam. The rationale behind this is to reform the higher education system in order to move Thailand towards an innovation-based economy in line with Thailand 4.0 strategic plans.<sup>10</sup> The focus will be on STEM areas for research and development with an emphasis on knowledge and innovation which will help stop Thailand slipping into the middle-income trap, as well as an emphasis on improving the administration and internal operations of universities.

## Vietnam

Similarly, Vietnam places emphasis on the fourth industrial revolution and the need to prepare students for the future. There is an impressive reform agenda which is looking to bring in more international students and staff. This is reflective of new regulations and encouraging more foreign investment in the educational space.

The reform agenda hits a number of the similar buttons that are being pushed across other ASEAN nations and were also underlying themes of the conference.

These include:

- Greater Autonomy for institutions (a challenge across the region, but more so in a traditional command economy such as Vietnam)
- The need to establish effective governance and financial independence
- Improving teaching and learning quality
- Ensuring that the graduates are employable.
- Engaging with industry more closely.

International education or at least engagement with international partners is seen as a key driver in achieving these objectives.

---

<sup>10</sup> <https://thaiembdc.org/2018/10/22/national-strategy-thailand-4-0-officially-launched/>  
www.britishcouncil.org

---

There is significant investment from overseas industry mainly from Japan and Korea especially from Samsung and other large-scale Korean companies as they move away from the increasing labour costs in China. The challenge is to ensure the workforce is sufficient training to react to these opportunities and there has not been historically much involvement with industry by higher education institutions. As is true throughout much of ASEAN, industry is moving much quicker than universities and industry feels it has to re-train graduates.

Transnational Education has begun to gain a foothold in Vietnam, although unlike Malaysia it is driven by the need to develop capacity, create effective programmes and develop research collaborations rather than any desire to attract large numbers of international students.

Prof Tran Anh Tuan from the Ministry of Education & Training in Vietnam warned that we have to prepare students for a changing world and not merely chase success in rankings – a theme that was echoed throughout the conference.

## Singapore

To a large extent Singapore is the outlier in the ASEAN region with a GDP per capita of over US\$53,000<sup>11</sup> and highly ranked public institutions with sizeable budgets for research.

There are though some key issues in Singaporean Higher Education which although not resonating strongly at the Going Global conference have implications across the region and where Singapore goes others may follow.

The Singaporean government remains concerned about an over-emphasis on obtaining a degree combined with the related worry that the next generation have the skills required in the new economies. However, parents are still to be persuaded that a degree is not always the best route for their children or in the value of vocational qualifications. This is a common concern across ASEAN and has hampered TVET development.

The Skills Future initiative<sup>12</sup> which has significant resources is a response to both the concern to develop the necessary skills for the future, but also to ensure its aging population is adopting a lifelong learning philosophy. As praised in the conference by a number of speakers – the initiative allows the population ‘to upskill in areas they are passionate about’. The concept being to build ‘stackable qualifications’ and credits.

Singapore has also focused on developing skills in areas where they have significant shortages which includes nursing, cyber security and engineering. Some quite imaginative ways to access

---

<sup>11</sup> <https://www.nst.com.my/business/2018/07/391900/malaysia-singapore-gdp-gap-narrows>

<sup>12</sup> <https://www.skillsfuture.sg/>

---

this talent have been highlighted including hackathons. Concerns remain that industry is not as fully engaged in the process as they could be.

In the view of the British Council Singapore workplace learning is an area where UK remains advanced beginning with its foundation degrees in 2000 which were essentially the first two years of a degree with a more vocational focus. With the focus on skills development that is being pushed by the Singaporean government, the UK has certainly been seen as a model in terms of its Quality Assurance framework and overall regulations. However, in terms of implementation and practical results, Germany's DUAL VET system/apprenticeships is seen as more advanced.

Transnational Education is certainly active in Singapore with a range of UK qualifications and Australian branch campuses. However, it is a challenging time for the private education sector with tightening regulations and increased scrutiny on the marketable value of a TNE degree.

Unlike other ASEAN nations there is little strategic desire at governmental level to increase the numbers of international students and as Dr Graeme Atherton stated there are domestic, probably misplaced, concerns among the population that international students replace places for local students at the public universities. This is very different for private institutions who with a demographic downturn will need to rely on an increase in international students to fill its places.

The aging population in Singapore is an acute issue and will reach a critical point next year, as the number of people above 65 will equal those under 15 for the first time in history, Singapore already has the oldest society among ASEAN's 10 member nations; the median age of its resident population is 40.5 years old. In contrast, the projected median age for ASEAN in 2020 is 29.8 years.<sup>13</sup>

## Indonesia

As with a number of ASEAN nations, Transnational education has been seen as a key priority for the Indonesian government as a route to open the market, increase quality and internationalise institutions. The Minister of Research, Technology and Higher Education Muhammad Nasir indicated that the decision was to give the opportunity for foreign universities to open branches in Indonesia through cooperation with local private universities. There are already some examples of transnational education and the potential for blended learning with online delivery by the overseas partner and face-to-face delivery by the local (private) partner is being encouraged, which is an innovative form of TNE delivery.

---

<sup>13</sup> <https://www.businesstimes.com.sg/government-economy/singapores-ageing-population-a-ticking-time-bomb>  
www.britishcouncil.org

---

Due to the size of the sector with nearly 4,500 institutions there is inevitable varying quality and the central ministry in Jakarta does not have the resources to effectively manage the system.

Perhaps unique to Indonesia is the significance of Islamic Higher education which caters for around 20% of the student population and 26 Islamic universities are run by the government. It has in the past been neglected by central authorities and is poorly supported though there has been a recent push to encourage them to teach non-Islamic subjects which allow them access to increased funding. This greater attention is also connected to the perceived rise of extremism in campuses which is a concern expressed by the Ministry.

UK has expertise in Islamic Studies, but this tends to arise from the language approach i.e. Arabic and few have sufficient capacity in Bahasa. Another key theme is entrepreneurship or the lack of it in institutions and the government has allocated central funding to encourage universities to play a role in entrepreneurship.

As across ASEAN Indonesia has embraced the idea of 4.0 and the recently published Industry 4.0 roadmap has a focus on updating the curriculum and ensuring an 'innovation-based ecosystem.' This is connected to the focus on ensuring more effective HE and industry collaboration.

As with other ASEAN nations, vocational education is a key agenda item especially whereas in the past a vocational pathway represented only 20% of secondary provision, it is now more like 50%. British Council is less focused on interventions at a TVET level, but FCO is looking at a large-scale TVET project in 2019.

As was seen earlier in the statistics there are a very small number of international students in Indonesia. British Council has coordinated a training on how to encourage international students and especially on short summer programmes. Long-term study is hampered by current visa arrangements which make it problematic to undertake a full UG programme without frequent visa renewal.

Dr Subroto from the Ministry of Research, Teaching and Higher Education sees the focus in improving access, relevance and quality as well as improving 'innovation competency'. The EU Share project which is led out of British Council in Indonesia is aimed at creating the environment for effective mobility across the ASEAN region. Its focus has been in aligning the framework of qualifications across the region and creating larger scale mobility than perhaps are currently in existence across the more specialised AUN network. The major donors are active in Indonesia with World Bank being very much focused on basic education whilst ADB pays more attention to basic infrastructure.

---

## Myanmar

Myanmar has around 174 HE institutions which sit under 9 different ministries. The doors of Myanmar are, of course, more open now and since 2015 the pace of change has increased significantly. The National Education Strategic Plan emphasises four key areas

- The traditional centralised model of governance needs to be substituted with a more corporate model that focuses on performance, accountability and autonomy.
- Myanmar's higher education system needs significant improvement in terms of quality related dimensions, such as curriculum, learning environment, research and teaching processes.
- Issues of affordability and accessibility both impact access to higher education. Support programmes are needed to help students to overcome cost barriers for higher education.
- Myanmar's higher education institutions need to improve their research capacity in order to foster the development of new ideas and innovations.

Transnational education is at developmental stage, although there are a number of local providers who offer UK programmes such as the University of Bedfordshire. Growth is hampered by lack of a clear policy and the Private Education Law is still awaiting ratification which may allow foreign investment. TVET is a priority but remains unstructured and mostly in the private sector with significant overseas investment from Japan and Singapore.

During GG 18, Dr Khine Mye from the MoE in Myanmar was clear that 'foundation building' is the focus and saw the potential to mainstream 21<sup>st</sup> Century skills by building interdisciplinary collaborations and institutions. The challenges are immense across the sector and moving to 4.0 is tough when the previous stages (1.0 -3.0) have not been realised. Inevitably much of the focus of the major donors is on basic education (such as the World Bank assisting with the development of national assessment tools) and indeed, the government has recently completed reform of the basic education curriculum. The focus of the government's education budget remains on basic education at primary and secondary levels, with higher education and TVET getting a much smaller percentage of the allocation.

This focus was reiterated by Dr Zaw Wai Soe Rector of the University of Medicine in Yangon who saw the need to future-proof students and arm them with digital skills, but also to ensure that they are in 'good mental health'.

## Malaysia

As the host of Going Global 2018, Malaysia had many opportunities to highlight its Educational Blueprint which despite the change of government immediately after the conference remains largely intact. Some of its specific remedies such as iCGPA (Integrated Grade Point Average) may have been dropped, but the main thrust of the plan remains firmly in place with a new Minister drawn from the university sector. Of the 10 emphasised shifts in the plan, many share [www.britishcouncil.org](http://www.britishcouncil.org)

---

similar objectives to the plans outlined in ASEAN governmental plans across the region. These include:

- Entrepreneurial graduates with relevant skills
- Lifelong Learning
- Governance
- Innovation in specific areas of strengths
- Global Prominence

Since the UK leads in the field of transnational education and the conference was held in Malaysia which is a UK TNE hub in the region, a number of the sessions and debates revolved around this topic at Going Global 2018.

Dr Parmjit Singh, CEO of Asia Pacific University indicated that the initial driver of TNE in Malaysia was to a large extent driven out of necessity with a national economic plan leading to quotas for the public system. This led to the expansion of private colleges who offered UK degrees via a franchising model primarily catering to the Chinese and Indian Malaysian population.

The Malaysian Qualifications Agency (MQA) have developed a sophisticated framework and system in monitoring the quality of the various permutations of TNE and this is already seen as a regional guide to appropriate quality control.

There was a general agreement across the conference that Transnational education should:

- Be Sustainable
- Be for mutual benefit
- Reflect the needs of the host country.
- Be not just for students, but also for staff development.

Even with the change in government, TVET remains a priority with The Director-General, Department of Polytechnic and Community College, the Ministry of Education Malaysia, Prof Dr Mohd Ismail Abd Aziz sees the role of TVET not merely as providing skills for the nation, but also opening up opportunities to the marginalised. Indeed, 80% of the students in the sector are from the bottom 40% in terms of income levels. The challenge, again a theme across ASEAN, is to see the vocational path as valued equally as the academic one in the minds of both parents and students.

---

# HIGHER EDUCATION HORIZONS 2025: NEW AGENDAS FOR INTERNATIONALISATION IN ASEAN

On 13 December 2018, the British Council brought together over 40 key stakeholders from Ministries of Education, Higher Education (HE) leaders and practitioners as well as other key influencers in the ASEAN and broader East Asia region, for a Regional Policy Forum appropriately themed ‘Higher Education Horizons 2025’, as part of a series of interconnected regional activities following on from Going Global 2018. The overarching aim was to provide a platform to deepen discussions with a forward-looking perspective that supports ASEAN’s higher education internationalisation agenda towards 2025, and to promote regional and UK collaborations in Higher Education through knowledge exchange and sharing of best practices.

## Overview

The sessions were divided into several world café and panel discussions which were built around the forum theme and designed to unpack the priorities, challenges and opportunities in Higher Education Internationalisation in ASEAN towards 2025, with the following objectives:

- To share case studies and perspectives from key stakeholders (ministries, universities and agencies) on forward focussed higher education internationalisation strategies in the UK, ASEAN and broader East Asia.
- To develop recommendation that support the priority areas for regional higher education internationalisation towards 2025
- To examine the potential of mutually beneficial collaborations between the UK, ASEAN and the broader East Asia region in supporting the 2025 internationalisation priorities.

## General perspectives on internationalisation

The speakers and audience of the forum collectively agreed that there will need to be future models of Transnational Education (TNE) for the ASEAN region, taking into account the commonalities of these nations but also the different pathways towards internationalisation of education.

Technology will definitely play a pivotal role in shaping how students learn, the style of delivery and must continuously evolve based on the students’ needs. For example, the impact of technology on “internationalisation at home” is significant, which is recognised as a priority for many institutions to provide an international experience for students who cannot afford studying abroad. Both virtual and physical foreign campuses can drive local institutions to raise the level of quality and hence become more competitive.

The higher education landscape needs to be more flexible to address different needs. An increase in mobility of staff across institutions helps exchange of skills, ideas and attitudes for both the public and private institutions. The increased emergence of private industry players such as Pearson may stimulate the higher education to be more innovative in its delivery.

---

There were concerns that existing provision in TNE is saturated in certain countries. Local higher education institutions are advised not to offer overseas degrees which do not align with their strategic goals. The courses offered should be skill-focused and relevant to the future workplace. The skill-industry-fit can be enhanced through further collaboration between industry and the institutions.

With the acceleration of transnational education, quality assurance (QA) remains an important credential across ASEAN. The QA system should reflect the local needs and still align with the QA of the source country (e.g. UK). Indonesia showcased that their system is open for TNE, but a specific quality control with regards to TNE is still being developed.

Through transnational education, a stronger relationship with industry can be forged. In addition, with trilateral partnerships (local universities – UK institutions – industry) can help to address global agendas such as the United Nations' Sustainable Development Goals (SDGs) more holistically.

National governments representatives believe that the path towards internationalisation can be strategised via a two-pronged approach. Internally, the agencies need to ensure a thorough collection of data, which is consistent across ASEAN that help creates policies that are also open for the private sector. Looking outward, while the current focus is on collaboration outside of ASEAN, there are demands to create ASEAN's own Colombo Plan. This would encourage inward mobility across ASEAN and strengthen the human resources pillar for the ASEAN higher education sector.

From the perspectives of higher education institutions (HEIs), there is a call for a greater flexibility and agility within the institutions. A few key issues were raised, including the slowness in responding to industry needs and real world problems, the “faculty silo” that prevents appropriate collaboration across faculties and disciplines. To incentivise talent and human resource development, a more competitive salary structures will encourage collaboration and innovation as well as a progressive move away from rewards based on length of tenure. Intercultural competency also is viewed as an opportunity to better understand different cultures and diversity across an institution, which is a steppingstone to invite external collaborators, funding partners and students across the world to opt to invest in the institution. That being said, internationalisation should be a facet that is developed across the institution rather than from single departments or faculty members. The internationalisation capacity has to also be developed within the administration and support functions.

The rise of private institutions can be seen as a positive phenomenon to fill the demand for Higher Education across ASEAN. As the public-private divide is weakened, collaboration and resources sharing can achieve a win-win platform for educators and learners. In terms of financial resources, a higher level of creativity is required to capture various funding opportunities and sustain long-

---

term revenue generation. To direct the effort of internationalisation on the right path, institutions need to constantly be abreast of and benchmark with the best in the field.

Recognising the uniqueness among the countries, ASEAN and regional organisations aim to establish a common ground in a complex region, before regional initiatives are brought forward. Aside from capacity building and technical credit transfer, there is a need for a central database that can provide knowledge and be utilised on a shared basis. With increased access to technology, the coverage has to be more inclusive, taking into account the digital challenges in the aged and rural populations. The regional collaborators are also in the process of determining if the focus should be on the ASEAN University Network, or embracing others outside the network, across the sector. To manage the resources more effectively, there needs to be a consensus on a regional body that can manage the overall funding pool.

A key issue for industry is the skills mismatch between graduates and industry needs. The priority is to close this gap by 2025 and industry-university partners have prepared some solutions. Participation of industry representatives and experts become more involved in academic development. Talks from industry players are organised within the campus and faculty attachment programmes are initiated in the industry. These initiatives look to address the talent development concerns, ensuring internships cover both TVET and generic skills. By doing so, there will be a higher mobility in the workforce as skilled workers avoiding being sidelined when their specialist skills become redundant in a sector. This industry-oriented ambition can be facilitated by and align with government policies as a regional priority and an increased emphasis on a cooperative learning network between industry and students.

Students must be viewed as key stakeholders in higher education. Their roles include customers, partners and knowledge creators through research and community engagement. As main stakeholders, student representatives participate in decision making such as in the student senate, programmes and curriculum consultation, as well as public speaking corners. This will strengthen student empowerment in addition to their voice being heard to improve university management and service accessibility.

Institutional innovation is essential and should be student-centric, in response to students' needs and readiness in the 21st century and their future employability. A full spectrum of programmes are helpful to address their transition from secondary school to higher education. Non-traditional teaching approaches and providers are encouraged and the "DIY degree" is an opportunity in a more flexible future education system. To elevate the provision to address the change of environment and students' needs, HEIs are expected to amplify capacity building of the research and teaching faculties. The rise of effective leadership is the key to unlocking future stability and achieve a higher level of autonomy.

---

## Institutional Perspectives

Prof. Tan Kay Chuan from the National University of Singapore (NUS) shed light on the five key reasons for internationalisation of an institution: (1) improve students' readiness to global challenges, (2) internationalise the curriculum and (3) enhance the international profile and institution for higher competitiveness, (4) strengthen research and knowledge production and (5) increase diversity of staff and faculty. One of the aims of the university is to "Bring the world to NUS". Currently 60% of undergraduate students complete their studies overseas, while 60% of postgraduate students are non-Singaporeans.

Deputy Vice-Chancellor (International) from University of Malaya (UM), Prof. Dr. Kamila Ghazali related their internationalisation endeavours to six key focus areas – (1) strategic visits, (2) global events, (3) student mobility, (4) marketing/recruitment, (5) international scholarships and (6) global networks. Internally, the internationalisation effort sees the creation of research clusters as contributing to more interdisciplinary research. 47% of the total research output now are co-authored and internationally published. Double-degree holders are exposed to a more internationalised curriculum. UM is also looking at increasing its staff capacity especially international talent and experts, expanding from the current capacity of 773.

National Taiwan University (NTU), represented by Mr. Andrew Chao, has developed a unique focus on a Southbound policy, besides ASEAN, which also looks towards connecting with India, Sri Lanka, Bangladesh, Bhutan, Australia and New Zealand. NUT's focus remains in playing three key roles: (1) educator, (2) researcher and (3) engager who embarks on solving social and global issues. A few key examples include research work in gender equality, innovations in technology and cancer research.

With the founding inspiration and history, De La Salle University (DSLU) serves as the bridge for scholarship and faith. Co-operation with international partners is seen as the key to achieve institutional goals. Dr. Laurene Chua-Garcia summarised the focus as (1) marketing and recruitment of students, (2) international support services that complement the (3) international academic and research activities. To achieve these aspirations, a closer co-operation between the strategic executives and the operational arms of the institution, has to be formed. As a public university, the institution faces the challenge on funding, sharing the same predicament as the national agencies. This challenge is a major difference between the private and public sectors.

As a regional intergovernmental organization to promote cooperation in education, science and culture, Student Mobility (AIMS) from SEAMEO-RIHED plays a pivotal role to facilitate intra ASEAN mobility with 4,100 students and alumni in their programmes. The key focus now is to address the issue of limited resources and try to bridge the gaps with the member countries. The organisation is increasing collaboration with China as well as encouraging credit transfer across the region.

---

In the next decade, there will be 1 billion learners who require new skills and will possibly become debt-ridden due to student loans. In Asia alone, there will be 200 million new post-secondary graduates. The increase in demand and cost of learning are key challenges that Artificial Intelligence is set to address, a perspective shared by Mr. Danial Rahman, Head of Growth, Open Learning Malaysia. The “how-to” of learning will continue to change: non-degree programmes such as MOOCs, nanodegrees and other short programmes will exceed full time university degrees, 50% of the global youth population will opt for mobile learning. Interactivity will be more important than the learning management systems as they need to be more than a repository for knowledge. The phenomenon of “great unbundling” on degrees programmes see the MOOCs start to mature and many will become accredited. Malaysia currently has 1.1 million users and over 100 courses to be replicated across the region.

University of Nottingham Malaysia is a great case study of work across UK, China and Malaysia. The university offers international education to the students with increasing access to learning in these countries across the region. With almost 20 years of experience in Malaysia, it has become part of the local education scene. Dr. Rozilini M Fernandez-Chung, Associate Professor of Education dedicated the success to the collaborative ties between the institutions across the region.

## **Country Perspectives**

The discussion on Malaysia in embracing internationalisation of education, focused around the topic of student empowerment. This can be further apprehended from the historical context on students’ participation in political activities, starting from 2012, when students were allowed to participate in political activities outside the campus. When the Universities and University Colleges Act 2012 was abolished in 2018, students were able to voice their views and express themselves freely. The change in policy allows for the communication of values and opinions within the campus which includes international students. The operational and marketing challenges persist such as the application for licenses to recruit international students, the growth of competition (more HEIs) faster than the market size (the number of students) and to address the relevance to cultivate “global citizens”. Global classrooms concept has been implemented in HEIs such as Curtin University, as learners can attend classes from Malaysia, Singapore and Australia without physically traveling to the countries.

Thailand defines internationalisation (IZN) as “The development process through integrated university missions for staff and students at all levels to adapt themselves in the VUCA world”. VUCA refers to Volatility, Uncertainty, Complexity and Ambiguity. The challenge is to ensure mutual understanding of IZN while ensuring the benefits are felt across the region. In the process, government is expected to constructively lead, facilitate and partner with institutions. This can only be feasible if policies are established based on the needs of institutional and national stakeholders. The Office of Higher Education (OHEC) Thailand has been committed to this movement since 1991 and believes that co-operation rather competition across the region is the right way to go.

---

Myanmar has a total of 172 public universities that are run by various Ministries, with a lack of substantial influence from the private sector. The main challenge for internationalisation is the lack or incompleteness of data on international students, international faculty or mobility. Within the historically centralised education system, a major effort is poised to increase institutional autonomy. From the global perspective, ASEAN countries, UK, Australia and other countries have been collaborating with Myanmar since 1997.

On the education landscape of Vietnam, there remain prevailing issues concerning the quality and accessibility of education for learners, a mismatch between the skills and needs of employers, the conservative attitudes of educators persist even when pedagogy has profoundly changed. In the field of research, HEIs are striving to be relevant and disseminate the research output to a larger audience. This should work hand-in-hand with the support of online courses or open learning such as the MOOCs. In this way, the locals are exposed to an international content and institutions. Similar to the experience of other ASEAN nations, the policy makers and HEIs need to work on a common ground and align to the priorities of multi stakeholders to facilitate the change.

Indonesia provide more than 21,000 programmes from 3,300 institutions, with the majority of these being private institutions. The ambition is to be the most preferred Higher Education destination in South East Asia and developing a world-class higher education system. The current focus is upgrading overall competency on science, technology and innovation (STI) in order to improve the national competitiveness. The rankings are seen as the steppingstone for mapping the local universities on the global stage. The internationalisation effort is channeled to increase collaborations on research publications and also aims to increase the mobility for students and staff to understand the global challenges.

Korea has a well-developed system with a high progression rate (66%) to tertiary education. More than 200,000 students have furthered their studies mainly in China and the USA. The current focus of the HEIs sector is an inward mobility strategy, which targets to have more than 200,000 students studying in Korea by 2020. To be successful in achieving this goal, Korean HEIs have to raise their visibility to attract interests of learners from around the world. In conjunction with this, various programmes such as Campus Asia (an Asian version of Erasmus) and Brain Korea 21 (to cultivate world-class research) have been ongoing.

## **Summary**

It was evident from the deliberations that ASEAN was viewed as a positive force for the HE sector in its economic, political and geographical terms, despite issues of regional disparities. The forum provided a dynamic platform for delegates to delve further into the implications of the future trends, challenges and opportunities in Higher Education internationalisation, and reflect collectively on the key outcomes from Going Global 2018 which underpin the priority areas and actions plans for internalisation, moving forward.

---

## Appendix

# Higher Education in Korea: Insights from an ASEAN+3 country

### Background

ASEAN+3 cooperation began in December 1997 and was institutionalized in 1999 when the Leaders issued a Joint Statement on East Asia Cooperation at their Third ASEAN+3 Summit in Manila. ASEAN thus agreed to further strengthen partnership and deepen East Asia collaboration with the People's Republic of China (PRC), the Republic of Korea (Korea) and Japan to address mutual issues and concerns at various levels and in various areas.

### Overview

Korea is a well-performing, mature higher education market which is at a very different stage of development than many ASEAN countries, although some instructive comparisons may be made between Singapore and Korea.

As with Singapore, Japan, Taiwan and Thailand the country faces a demographic crisis which has caused into question the very existence of its approximately 200 HE institutions (4 year Universities). Indeed, the previous government proposed a restructuring plan about 6 years ago which looked at reducing the total number of universities either through merger or closure. Two universities have shut down which was a major story in Korea, although the present government appears to be more lenient the demographic trends are fairly inevitable. Consequently, universities are required and are themselves pushing to show their value in terms of student evaluations, employability statistics and value to the community.

This theme of 'proving their relevance' was apparent at GG 18 and there are a number of initiatives such as Campus Town which tackle the twin problems of graduate unemployment and urban regeneration with a proactive agenda from the Mayor of Seoul. It was also clear from both GG 18 and discussions with British Council that UK is seen as a leader in this kind of engagement.

**Transnational education (TNE)** is not really the key issue that it appears in ASEAN countries. There are a number of free economic zones such as Incheon and Jeju Island, but a feeling that the current operators are struggling apart from possibly George Mason University. Clearly in an environment where declining enrolment and threats of mergers/closures are across the sector then the opening of new campuses is not a key priority.

UK Transnational education penetration and opportunities for dual programmes remain limited with very few TNE programmes and only one notable dual degree from Northumbria. However,

---

recent revision of the Higher Education Act has reiterated Universities' freedom to run joint programmes with approved overseas universities and recognise them as equivalent to Korean university degrees.

Conversely, Korean Higher education is interested in exporting itself and also has looked at a replica of the Erasmus programme between Korea, Japan and China. It also envisages itself taking the lead in mobility and Higher education across the region.

One area that is a clear area of strength is **university - industry partnerships** which are firmly embedded in the system, Samsung has key collaborations across the sector especially with Korea Advanced Institute of Science and Technology (KAIST) and Sungkyunkwan University (SKKU).

**Rankings** were an obsession a few years ago and although 'everybody hates them, everybody looks at them'.

**International students** are a key theme in Korea with the main, often unstated, motivation being to fill the gap in undergraduate recruitment due to the demographic downturn. Currently international students are mainly from China, Mongolia and SE Asia. Current figures are around 100,000 with a target of around 200,000 for 2023.

There are 50 cultural centres globally and Study Korea sees British Council as a model in promoting Korean Higher education as well the wider cultural agenda.

In the past, Korea was proud of its higher education participation rate of 80 – 90%, but debate has now followed the familiar line of "too many university graduates" and unemployment rate is relatively high amongst the youth. Plans are to look at alternative pathways and perhaps work before study although the lure of a degree has a strong place in the mind of parents.