STATE OF HIGHER EDUCATION
IN SOUTHEAST ASIA

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Scan to access the report:
Structure

Background
Objectives
Methodology
Main Findings
Recommendations
Background

Need to look into the challenges and opportunities in sustaining higher education developments in Southeast Asia

Update previous state of play studies

Research Objectives

To examine the following dimensions of higher education in the region:

a. Recent developments, planned initiatives, and key issues to be addressed;
b. Challenges and opportunities at the regional and national levels on specific thematic issues; and
c. Issues and themes should be further addressed by policy development, reforms, and research.
Methods

systematized review of related literature on HE in Southeast Asia

1. peer-reviewed academic articles published in Scopus;
2. regional/country reports and policy documents from relevant institutions’ repositories;
3. studies whose titles contain at least one of the combinations of the descriptors defined in this review;
4. articles written in English;
5. articles published between 2010 and 2022;
6. open access articles or articles accessible through the permits of the research team members’ institutions
Thematic Areas

1 Equity, Diversity and Inclusion
2 Relevance to the World of Work
3 Internationalisation
4 Regionalisation
5 Systems Restructuring and Reforms
Equity, Diversity and Inclusion

Regional gross enrolment ratio (%) for Southeast Asia, 1980-2017 (UIS)

access to higher education in the region appears to have expanded significantly over the past forty years
CLMV countries represent the lowest enrolment ratios in the region (e.g. Lao PDR - 13% vs Singapore - 93%)

Social background continues to determine educational access

Significant gaps in HE participation and completion rates exist across four Southeast Asian countries based on location and socioeconomic status
Higher education attendance ▼

in Thailand ▼

Percentage of people aged 18-22 years attending higher education.

Gender

24% vs 33%

18-22, MICS, 2019

Male ▼ Female ▼

Location

17% vs 39%

18-22, MICS, 2019

Rural ▼ Urban ▼

Wealth

10% lowest quintile vs 45% highest quintile

18-22, MICS, 2019

Poorest ▼ Richest ▼
Expanding access to higher education has led to a diversification of education provision through privatisation.

More than half of the total share of enrolment in tertiary education in several Southeast Asian countries is in private HEIs.

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Distance and online learning modalities have been increasingly pursued in the region as a cost-effective measure to further expand access to higher education.

The COVID-19 crisis has revealed a wide gap in technological infrastructure that further aggravates equitable access to higher education. Internet access rates:

- 40% of the population from Myanmar and Viet Nam
- 60% of the population from Thailand and Cambodia
- > 80% of the population from Singapore, Brunei, and Malaysia
Challenges

limited understanding of equity target groups in national policies, with socioeconomic background and disability status being the most common objects of policy action

massive expansion of higher education access has led to the unwanted consequence of a decline in instructional quality due to a shortage of qualified teaching staff as well as public investment failing to grow proportionately with the demand
Opportunities

collect comprehensive and comparable data on access, participation, and success in higher education among a wide variety of subgroups must be strengthened, establishing the evidence base from which specific equity and inclusion policies and programmes may be designed
Relevance to the Changing World of Work

slowing down of the growth of the working-age population
<table>
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<th>Important existing trends that will continue</th>
<th>Future trends</th>
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<td><strong>Internet</strong>: will continue to be there in its current form and evolve to provide a wide range of Cloud services</td>
<td><strong>AI</strong>: will be very powerful in specific problem areas</td>
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<td><strong>Connectivity</strong>: Has mostly reached the point of delivering all we need where it is geographically available</td>
<td><strong>Big Data</strong>: Valuable in delivering new insights through data analytic</td>
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<td><strong>Virtual Reality and Augmented Reality</strong>: VR will remain niche but AR might play a larger role</td>
<td><strong>Robotics</strong>: Could automate more</td>
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<td><strong>Robotics</strong>: Currently widely used in manufacturing</td>
<td><strong>Autonomous vehicles</strong>: will evolve slowly and have limited impact by 2025</td>
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<td><strong>IoT</strong>: will deliver productivity gains and better working devices</td>
<td><strong>3D printing</strong>: could substantially reduce time to marker of new products</td>
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### Percentage of graduates from STEM programmes in tertiary education, both sexes (UIS)

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COVID-19 accelerated the use of digital platforms thus boosting the demand for workers with advanced ICT skills, including specialised engineers, cyber security professionals, and data analysts.

**Importance of digital literacy skills** for an inclusive, equitable, and future-ready education

**Higher demand for Science, Technology, Engineering, and Mathematics (STEM) graduates in the region**
Challenges

Digital adoption remains slow among CLMV countries, thereby limiting their ability to make the most of the growing internet economy in the region.

World Economic Forum Survey (2019): Young people perceive the most lack in their language skills, advanced digital skills (such as programming and data analytics), and maths and science skills – skill sets that are paramount if a move towards knowledge-based industries is desired.

Shortage of graduates from STEM fields and the lack of researchers in some countries will stall the region’s innovation and economic growth and development.
Opportunities

Incentivise the labour market participation of groups from traditionally marginalised groups such as women and older people.

HEIs in Southeast Asia must work towards enhancing the relevance of curriculum and instruction including work-based learning modalities such as internships.

Mobility schemes for study and work placement must be pursued, considering their potential to develop language skills and knowledge of local and regional markets.
### Internationalisation

**HE Internationalisation Trends in ASEAN** (Authors adapted from Khalid et al., 2019)

<table>
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<tr>
<th>Degree of Internationalisation</th>
<th>Country</th>
<th>Internationalisation Trends</th>
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</table>
| High                          | Singapore        | Increasing public expenditure  
Promoting international academic cooperation within and beyond SEA  
Emphasising cutting-edge research and development, and innovation  
Emphasising international profile and partnerships  
Hosting overseas branch campuses & being the third country for TNHE  
Promoting image as an educational hub |
| Medium                        | Brunei, Indonesia, Malaysia, Philippines, Thailand | High demand from international students enrolling in HEIs  
Emphasising education quality  
Lowering public expenditure by shifting cost to students  
Recruitment of international faculty/researchers  
Emphasising international research-oriented policy  
Promoting TNHE  
Controlled/limited overseas branch campuses, but the number of branch campuses are increasing |
| Low                           | Cambodia, Lao PDR, Myanmar, Viet Nam | Trying to improve education access, equity, and quality  
Under-resourced human capital and financial support for international activities  
Low number international faculty and staff  
Limited enrolment of international students  
Promoting academic and student mobility through a number of (inter)regional initiatives  
Promoting research-oriented policy (though with limited success)  
More opportunities for private HEIs  
Increasing engagement in TNHE |
Internationalisation

- International student mobility
  - There is a notable disparity between country groups in the region
  - ASEAN countries have tried to attract more international students within and outside the region (e.g., Singapore, Malaysia, and Thailand).

- Inter-regional collaboration
  - It is important for Southeast Asian countries to collaborate with other countries in the area of higher education both within and outside the region
  - Examples including CAFTA, ASEAN-EU, ASEM, ASEAN+3

- Transnational higher education
  - Southeast Asia has been a hub for TNHE since the late 1990s.
  - Although TNHE has gained students’ preferences, students report a number of challenges, mostly in terms of cultural norms in teaching and learning
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<td>United Kingdom 824 (33.4%)</td>
<td>Australia 334 (33.4%)</td>
<td>United States 53 (2.1%)</td>
<td>New Zealand 45 (1.8%)</td>
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<td>Cambodia</td>
<td>Australia 7,562 (24.8%)</td>
<td>Thailand 1,550 (20.5%)</td>
<td>United States 799 (10.6%)</td>
<td>Viet Nam 695 (9.2%)</td>
<td>Japan 631 (8.3%)</td>
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<td>Indonesia</td>
<td>Australia 55,961 (23%)</td>
<td>Malaysia 12,852 (17.7%)</td>
<td>United States 8,020 (14.7%)</td>
<td>Japan 4,722 (8.4%)</td>
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<td>Lao PDR</td>
<td>Viet Nam 9,202 (68.2%)</td>
<td>Thailand 944 (10.3%)</td>
<td>Australia 327 (3.6%)</td>
<td>Japan 214 (2.3%)</td>
<td>Hungary 162 (1.8%)</td>
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<td>Malaysia</td>
<td>Australia 55,311 (25.5%)</td>
<td>United Kingdom 13,470 (24.4%)</td>
<td>United States 6,710 (12.1%)</td>
<td>Japan 2,681 (4.8%)</td>
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<td>Saudi Arabia 896 (3.4%)</td>
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<td>United Kingdom 6,797 (29.2%)</td>
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<td>United Kingdom 6,819 (20.9%)</td>
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<td>Australia 15,959 (12%)</td>
<td>Canada 9,243 (7%)</td>
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Challenges and Opportunities

Constrained by:
- collection and publication of data
- monitoring of TNHE providers
- funding of international student scholarships
- brain drain
- foreign language competence

Internationalisation is viewed as a substantial stimulus to strengthen the performance of ASEAN HEIs
Regionalisation

Fostering a regional identity

To achieve the goal of building a regional identity, multiple region-wide initiatives have been taken.

ASEAN’s regional identity formation constitutes and is constitutive of region-building processes.

Harmonisation of higher education

Creating a regionally aligned credit transfer, a quality assurance framework for mutual recognition of qualifications, intra-regional student and staff mobility, and barrier-free mobility of highly educated labour.

Harmonisation in Southeast Asia is about having a common understanding of different processes and how each nation fits and compares to each other.

Quality assurance among systems in the region

Multiple collaboration initiatives among QA agencies and HEIs for QA at the regional level (e.g., AUN-QA & ASEAN Quality Assurance Network).

Different types of CTS have been developed within the region but there remains a lot of challenges to implement a CTS in the region at the present.

Credit transfer system

Enhancing student mobility was a key area identified for regional higher education harmonisation, especially when in the long run, student mobility can be a base for labour mobility.

Despite these initiatives, the scale of student mobility among the ASEAN Member States is still limited.

Intra-regional mobility

The higher education common space aims for structural convergence whilst retaining institutional and national diversity, and embracing heterogeneity in culture, language, and population of ASEAN Member States.

Sustainability of higher education common space

It is crucial that the region finds itself an educational identity or role that distinguishes it from the rest of the world.
### Intra-ASEAN Higher Education Mobility, 2019 (adapted from UIS)

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n : nil or negligible  
a : not applicable
Challenges

ASEAN Member States at different stages in the development of own QA frameworks

Lack of consensus among existing crediting systems

Regional QA Framework has yet to gain traction
Opportunities

Increase uptake of intra-ASEAN student mobility through funding, promotion, and a widely-recognized credit transfer system

Explore other forms of intra-regional mobility, including virtual and hybrid forms of mobility among teaching staff and researchers

Investigate the entrenched issues of privilege, inequality, and social justice around international student mobility and employability.
Higher education in Southeast Asia has undergone extensive changes and has encountered numerous challenges. Most notable reforms in the national higher education systems in Southeast Asia member states are portrayed in the following diagram.
Higher education systems in many ASEAN nations are moving towards privatisation and decentralisation by increasing university autonomy and the number of private institutions, and weakening governmental control over education.

Nonetheless, the governance of higher education in most Southeast Asian countries is currently still centralised (e.g., Cambodia, Lao PDR, Singapore, Viet Nam).

National budget cut on higher education (e.g., Malaysia, Thailand, or Indonesia).
Systems Restructuring and Reforms

- HEIs in the region have shown commitment to implement QA paradigms in their distance and hybrid mode of education operations as distance education expands and demand grows for improved quality and accountability.

- Many HEIs in Southeast Asian nations have formally established centralised QA units to control and manage the quality of their programs, implementing internal quality audits (self-evaluation), and involving external QA agencies to assess programmes quality.

- Governmental independence of external QA agencies in ASEAN is scarce or currently in transition to more independence.
Systems Restructuring and Reforms

- The perceived role of HEIs in promoting civil engagement and serving broader social responsibility that engages the community and services for the public good has been increasingly emphasised.

- Educational collaborative models with two-way transfer of knowledge and skills between HEIs and communities have been helpful in enhancing mutual sharing knowledge (e.g., Indonesia, Malaysia, Singapore, and Thailand).
Systems Restructuring and Reforms

- In response to changes in Southeast Asia, HEIs in the region have been actively implementing transformations to meet different learning needs of their students.

- Student-led education has been implemented, incorporating student well-being and leadership skills into their curriculum (e.g., CLMV countries).

- Service learning has gained more attention of curriculum designers in HEIs in the region.

- There have been noticeable efforts to improve English language proficiency and professional development of staff and students.

- ICT education and online distance learning have become one of the key developments in the pedagogy and curriculum in HEIs in the region.

- There exist challenges in realizing the reforms (e.g., Internet access, finance and funding).
HE in Southeast Asia: Quo vadis?

1. Collect comprehensive and comparable data on participation and success rates across various subgroups

2. Promote digital literacy for an inclusive, equitable, and future-ready education

3. Improve quality and uptake of STEM programs

4. Ensure relevance of curriculum and instruction which include work-based learning modalities and internships

5. Pursue student and research mobility programs
Recommendations

**Balance the expansion of educational access** with equitable policies and practices in higher education

**Leverage the fast-growing digital economy and sustain post-pandemic growth** by investing in digital and 21st century skills in partnership with public and private stakeholders

**Promote increased people-to-people connectivity** through virtual and hybrid mobility programmes within Southeast Asia and with other regions

**Support the systematic collection of data and research on Southeast Asian issues on higher education,** including EDI, mobility, and post-graduation trajectories
Recommendations

Balance the expansion of educational access

For policy makers:
Build their policy on UN 2030 Agenda, the Roadmap on the ASEAN Higher Education Space 2025.

Strengthen their efforts to establish and implement equitable higher education policies at the national and local levels.

Invest in the provision of targeted financial assistance such as scholarships in collaboration with private entities, philanthropists, and NGOs.

For HEIs:
Provide bursaries and other forms of targeted assistance for underserved groups

Train for teaching staff to be sensitive and respond to linguistic, cultural, religious, and political diversity

Build on the growth of online learning modalities to expand their educational offer to students, especially for underserved groups
Recommendations

Leverage the fast-growing digital economy and sustain post-pandemic growth

For policy makers:
Financial investments to enhance digital infrastructure must be pursued in order to overcome barriers for digital skills development and online learning in higher education in the region.

For HEIs:
tertiary-educated graduates in Southeast Asia must be equipped with digital, language, entrepreneurship, STEM, and other 21st century skills to sustain digital, international, and knowledge-based jobs.

Continuously support current initiatives such as work-based learning modalities, intra-regional student mobility, work placements, service learning, and innovation activities in partnership with all stakeholders.
Recommendations

Promote increased people-to-people connectivity through virtual and hybrid mobility programmes

For policy makers:

VE/COIL programmes must be pursued as a staple complement to physical mobility programmes to boost cost-effectiveness as well as allow more students to engage in international spaces, national governments must continue to engage in dialogues to align study visa requirements, issues around credit transfer must be addressed.

For mobility programmes:
collaborating with policymakers and HEIs for greater harmonisation and credit transfer to boost student mobility, including the use of digital credentials. Establishing monitor systems to continuously improve programmes.

For HEIs:
Providing clear information on available mobility schemes credit transfer to students & strengthening the capacity of their administrative and teaching staff to provide a positive student experience.
Recommendations

Support the systematic collection of data and research

For policy makers:
- Regularly collecting data related to salient higher education issues such as access, equity, mobility, skills development, and labour market participation
- More funding to research on the outcomes of higher education policies and programmes in order to support evidence-based policymaking in the region.

For mobility programmes and HEIs:
- Work towards data collection related to socio-demographic composition, qualitative feedback on student experience identifying areas for further improvement
Thank you!