



November 2014

Student Mobility Asia and Oceania

This Note explores the mobility of students from Asia and Oceania.

Mapping the mobility of students to and from Asia helps us visualize the importance of mobility in the region. First, figures for outgoing mobility for students from Asia and Oceania reveal which destinations they prefer.

This section is followed by an examination of the flows and the issues connected with student mobility in Asia and Oceania. The last section focuses on students from Asia and Oceania in France, using the 2013 Campus France survey on the image and attractiveness of France among international students.

Foreword

Asia is at the heart of global student mobility

For the past ten years, the internationalization of higher education has been accompanied by a strong increase in international student mobility. From about 4 million international students in 2010, the figures could reach 5.8 million in 2020 and 8 million in 2025 (+ 137% compared to 2009).¹

Student mobility in Asia has experienced many new developments; Asia is now at the heart of these changing flows in international students. As the top region of origin of foreign students in the world, Asia is a global talent pool. The region has also recently turned into a destination for international students.

Aiming at both academic excellence and increased visibility in world university rankings, Asian universities strive to play a leading role on the global academic stage.

• Top region of origin for international students

- Asian students account for 41.7% of total foreign students.²
- Among the countries with the most mobile students, Asian countries top the rankings: China (1st), India (2nd) and South Korea (3rd). Malaysia, which appeared in 5th place in 2011, now ranks 7th.

- The main destinations are English-speaking countries: the United States and Australia, followed by the United Kingdom. France ranks 8th.

• A global talent pool

Out of the 200 million students aged 25-34 that will graduate in all OECD countries by 2020, 40% will come from China and India.

• A new destination for international students

Many Asian nations such as Singapore, China, Japan, South Korea, and Malaysia, are taking initiatives to strengthen the internationalization of their tertiary education. As intra-regional mobility rises, they plan to improve the reputation of their academic programs in order to attract more mobile students.

• Increased international visibility

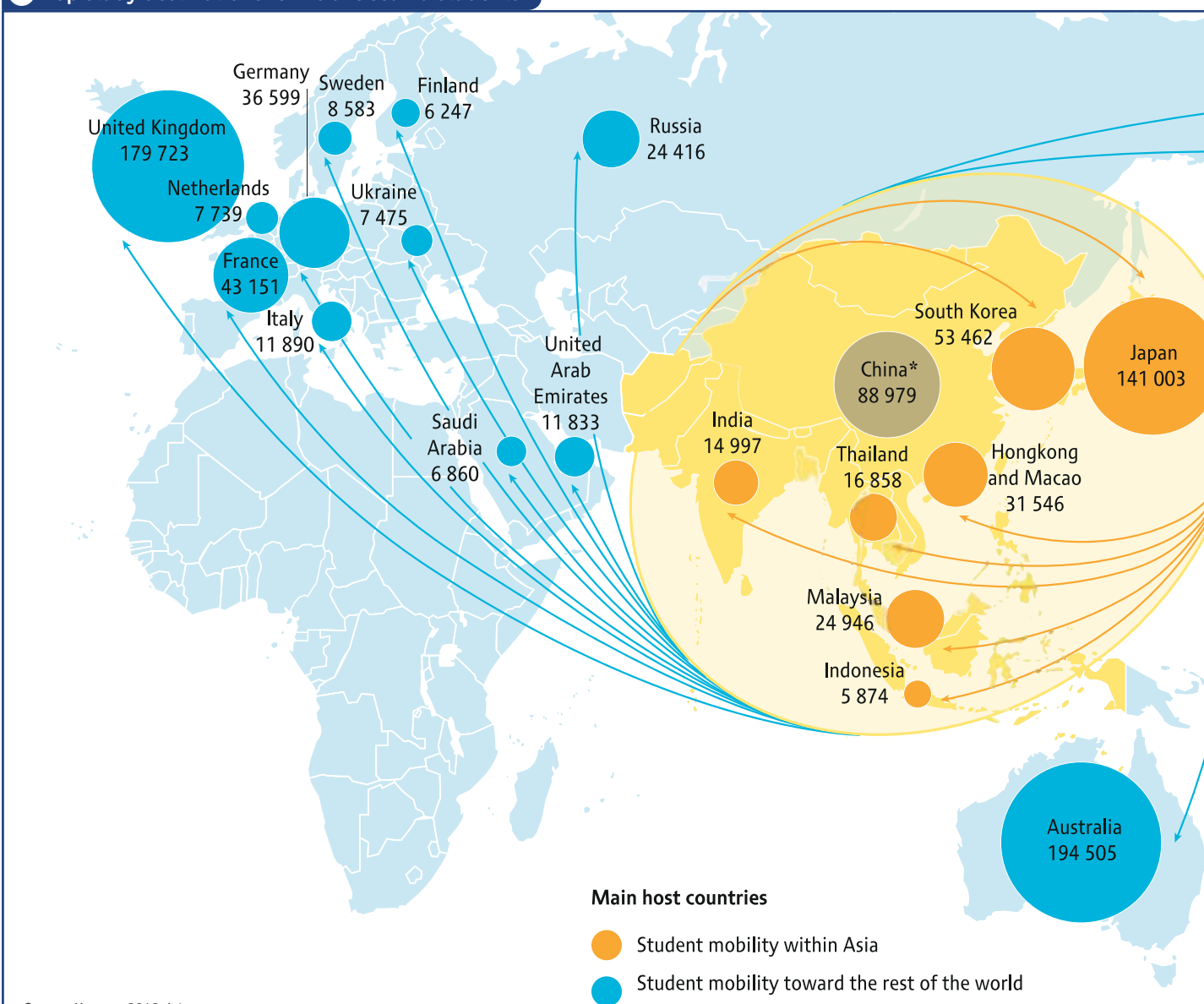
The dramatic apparition of Asia on the world academic stage comes with a priority being placed on academic excellence as some institutions continued to rise in various international rankings (*Times Higher Education*, Shanghai ranking, etc.).

1- Source OCDE, Education at a Glance 2012 *

2- Source UNESCO, total figures for outward student mobility, or 3,500,000 students. UNESCO estimates inward student mobility at 4 million.

I. STUDENT MOBILITY ASIA AND OCEANIA

Top study destinations for Asia-Oceania students



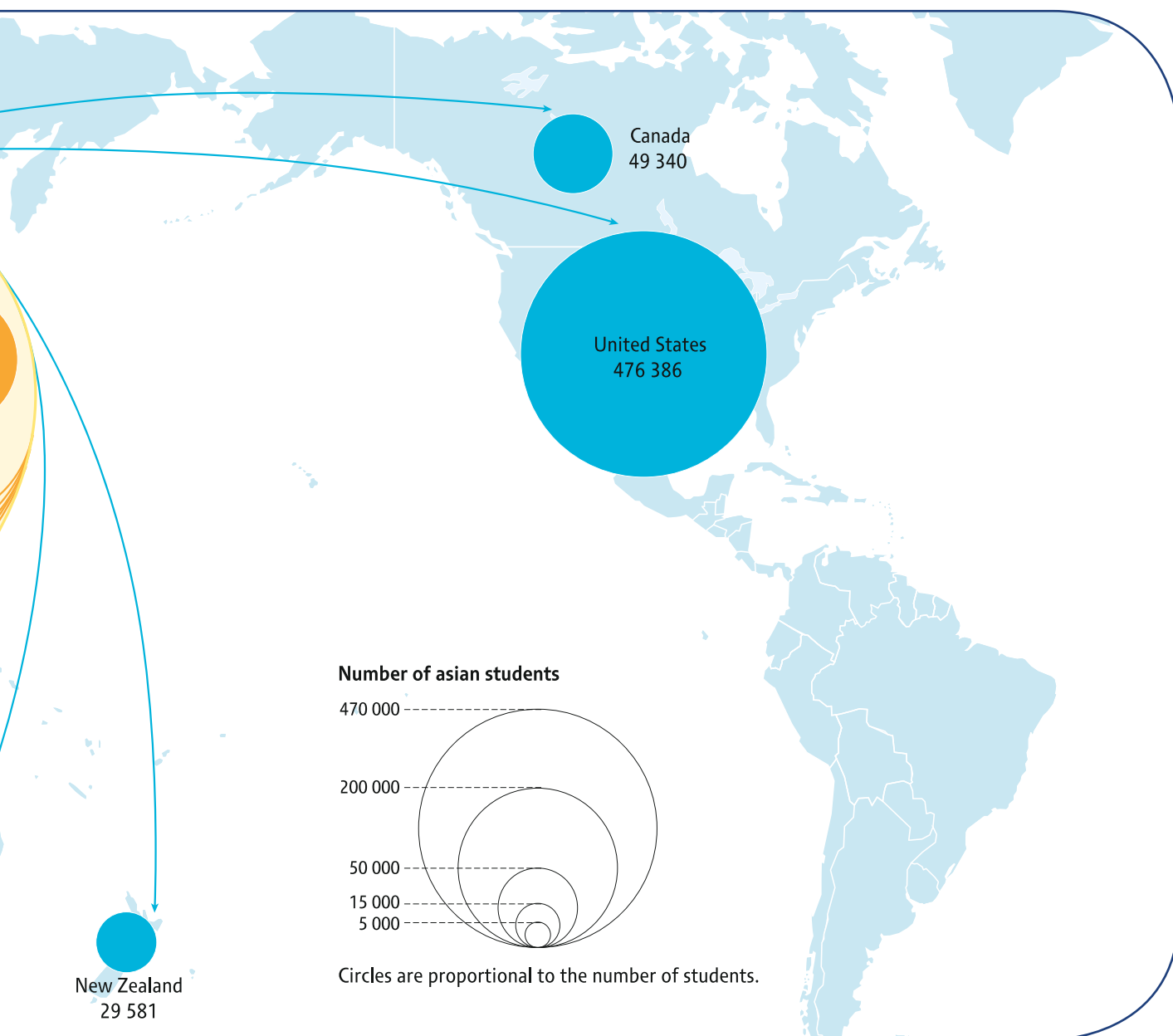
Source: Unesco, 2012 data

* See text box

Important information on statistics about China

According to data from UNESCO, China hosted 88,979 students in 2012, but this figure is an estimate with no accurate information on the countries of origin. According to Chinese authorities, 119,000 foreign students were enrolled in China in 2011.

	Top host countries for students from the Asia-Oceania region 2012	Share of total mobile students from the region	Rank / World
United States	476,386	30.8%	1
Australia	194,505	12.6%	2
United Kingdom	179,723	11.6%	3
Japan	141,003	9.1%	4
China*	88,979	5.7%	5
South Korea	53,462	3.5%	6
Canada	49,340	3.2%	7
France	43,151	2.8%	8
Germany	36,599	2.4%	9
New Zealand	29,581	1.9%	10
Others	255,751	16.5%	
Total	1,548,479	100%	



	Top countries of origin from the Asia-Oceania region 2012	Share of total mobile students from the region	Rank / World
China ⁽¹⁾	726,995	50%	1
India	189,472	13%	2
South Korea	123,674	8%	3
Malaysia	55,579	4%	7
Vietnam	53,802	4%	8
Pakistan	37,962	3%	17
Indonesia	34,999	2%	21
Japan	33,751	2%	20
Nepal	29,184	2%	24
Thailand	24,491	2%	35
Subtotal ASIA excluding CIS	1,430,600	98%	
Subtotal OCEANIA	28,900	2%	
ASIA + OCEANIA	1,459,500	100%	

(1) including Hong-Kong & Macao
Source: Unesco

According to UNESCO, 23 countries in the Asia-Oceania region (excluding CIS-Central Asia) account for nearly 1,460,000 international students, or 41.7% of all foreign students worldwide.

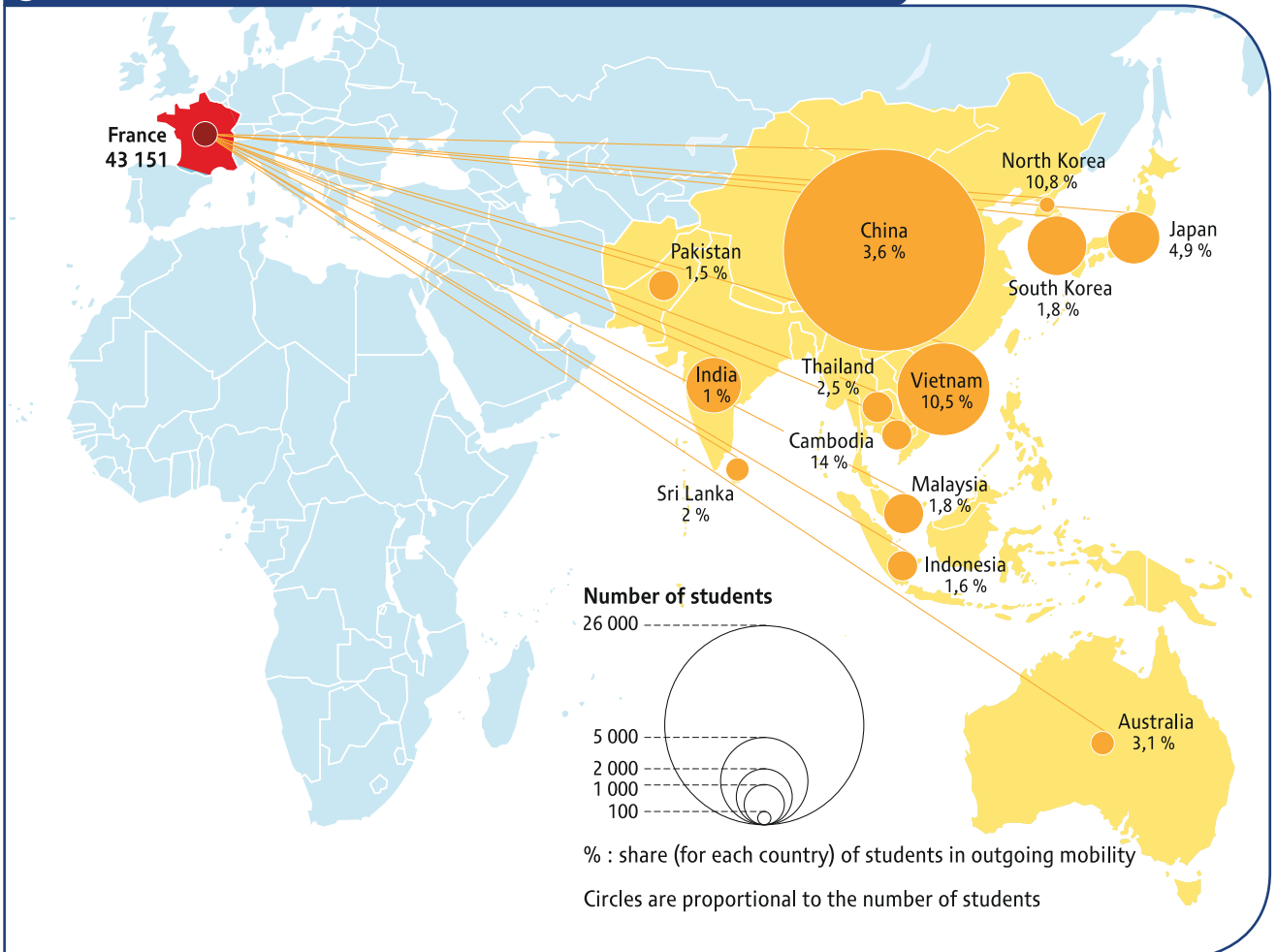
Asian nations are the world's top exporters of international students in 2012: China ranks first with 726,995 mobile students, India ranks second with 189,472, and South Korea ranks third with 123,674.

The largest exporter of mobile students, the Asia-Oceania region also attracts students intra-regionally: it hosts 39.8% of all Asian students, placing it just behind North America (with 34.3% of

international students) and the European Union (20.7%). However, this figure conceals significant disparities: most Indian, Japanese, Pakistani, and South Korean students go outside of their region of origin while those of Laos, Bhutan, and East Timor tend to study locally.

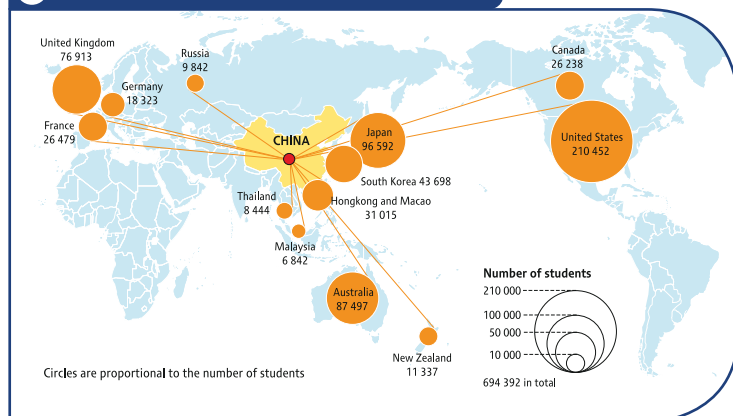
Asian students' primary study destinations are Europe and North America, which are very popular and host 476,386 students, or 30.8% of all students. Australia is second (194,505 students enrolled, or 12.6%). Then come the United Kingdom (179 723, 11.6%) and Japan (141,003, 9.1%). France ranks 8th with 43,151 students.

➔ Distribution of Asia-Oceania students coming to France by region of origin



Source: Unesco, 2012 data

Outbound flows of Chinese students*

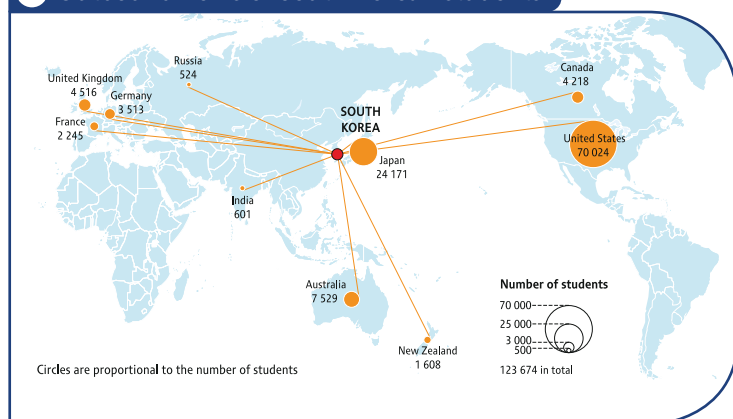


Source: Unesco 2012
*including Hong-Kong & Macao

Top destinations for Chinese students

	Figures	%	rank
United States	210,452	29%	1
Japan	96,592	13%	2
Australia	87,497	12%	3
United Kingdom	76,913	11%	4
South Korea	43,698	6%	5
France	26,479	4%	6
Total	726,995	100%	

Outbound flows of South-Korean students

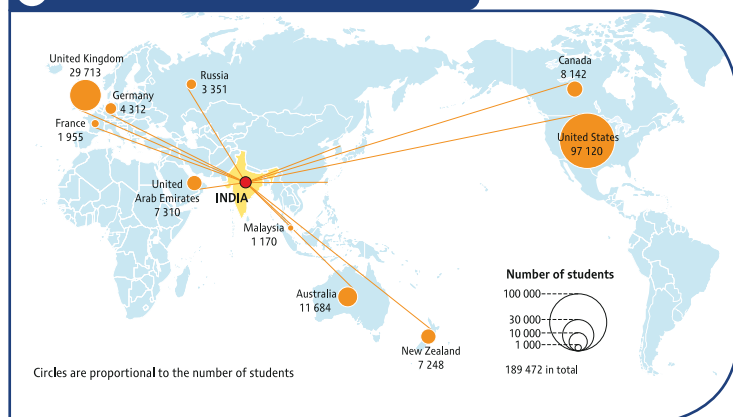


Source: Unesco 2012

Top destinations for South Korean students

	Figures	%	rank
United States	70,024	57%	1
Japan	24,171	20%	2
Australia	7,529	6%	3
United Kingdom	4,516	4%	4
Canada	4,218	3%	5
France	2,245	2%	7
Total	123,674	100%	

Outbound flows of Indian students

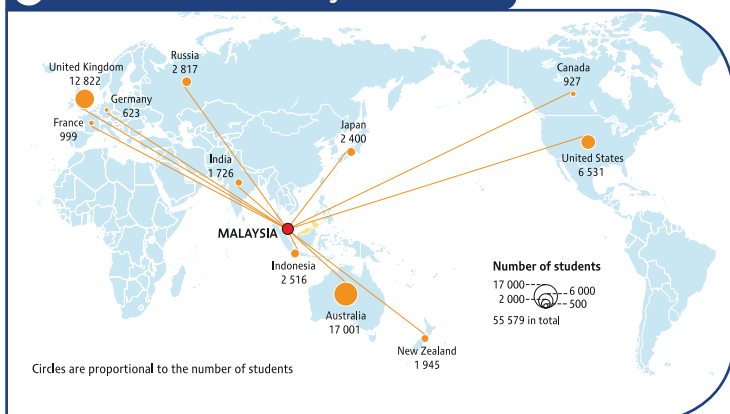


Source: Unesco 2012

Top destinations for Indian students

	Figures	%	rank
United States	97,120	51%	1
United Kingdom	29,713	16%	2
Australia	11,684	6%	3
Canada	8,142	4%	4
United Arab Emirates	7,310	4%	5
France	1,955	1%	10
Total	189,472	100%	

Outbound flows of Malaysian students

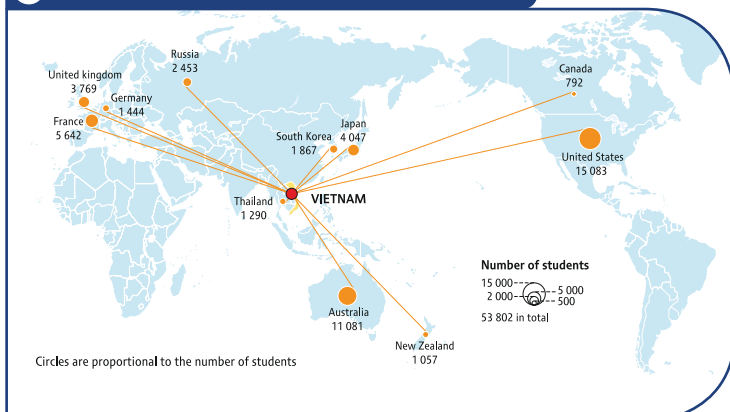


Source: Unesco 2012

Top destinations for Malaysian students

	Figures	%	rank
Australia	17,001	31%	1
United Kingdom	12,822	23%	2
United States	6,531	12%	3
Russian Federation	2,817	5%	4
Indonesia	2,516	5%	5
France	999	2%	10
Total	55 579	100%	

Outbound flows of Vietnamese students



Source: Unesco 2012

Top destinations for Vietnamese students

	Figures	%	rank
United States	15,083	28%	1
Australia	11,081	21%	2
France	5,642	10%	3
Japan	4,047	8%	4
United Kingdom	3,769	7%	5
Total	53,802	100%	

II. HIGHER EDUCATION IN ASIA AND OCEANIA: OVERVIEW AND ISSUES

The higher education sector in the Asia – Oceania region is going through a transition period.

Despite a very diverse region with very different characteristics – demographic, economical, and academic – a phenomenon akin to that of a “bubble” exists across higher education systems.

A “demand” for higher education has been dramatically increasing over the past twenty years. Enrollment in higher education in Asia has been

multiplied by 6 between 1970 and 2011, going from 32.6 million students to 182 million, 46% just in Southeast Asia. In some countries like Nepal, Sri Lanka, and Malaysia, the number of undergraduate students has increased tenfold over the same period.¹ This trend is set to continue according to all indicators, since Asian student population keep growing.

This ever-increasing demand for higher education is due to a combination of factors:²

- rapid demographic growth in Asia;
- heavy investment in primary and secondary education and, as a result, an enrollment surge in tertiary education;

1- UNESCO, 2013

2- “Higher education in Asia: Expanding Out, Expanding Up – The rise of graduate education and university research” UNESCO Institute for Statistics, 2014

- more and more people realize that higher education means better employment prospects. Governments have adopted strategies to foster higher education and academic research in order to enhance national development and competitiveness in an era of the knowledge economy.

Faced with these pressures and the **need to reconcile the sometimes conflicting demands of democratization and academic excellence**, governments in Asia have adopted different strategies to transform their higher education systems: construction of enormous new institutions, proliferation of satellite campuses, and investment in new technologies and online learning, among others.

These strategies have produced spectacular results: in just a few decades the Asian continent has emerged as a major player on the global academic stage.

Nevertheless, the challenges remain numerous and new issues have emerged:

➔ The issue of **higher education funding** and how it is distributed as needs are rising. Various governments have sought to diversify sources of funding. Their main solution has often been to switch some of the financial burden from the state to the families. They allowed and even encouraged a new private school system while simultaneously introducing tuition fees in public institutions. In this context, public policies are needed to ensure greater equity.

➔ Another issue: the proliferation of players from the for-profit education industry creates the **need for regulations**, including through accreditation systems that can assess the quality of training programs and can ensure the sustainability of the system.

➔ As demand for higher education rises, so is the need for **teacher training**. Many countries in the region are now facing a shortage of qualified teachers to meet these requirements. **Teacher training is a strategic issue** because, as governments see it, it determines the quality of education in the future and has an impact on the country's potential for research and innovation, and, eventually, on its economic development. The '911 Project' implemented by the Vietnamese government with the ambitious goal to train 20,000 PhD candidates by 2020 is a good example of how governments can address this concern.

➔ **Matching skills and labor market needs is another major issue** in a region where youth unemployment rates remain high despite strong economic growth. Therefore, these countries are primarily concerned with monitoring the quality of their training programs and rethinking the

organization and the reputation of their institutions and how they can quickly meet business needs – through increased collaboration with industry leaders for example.

➔ This international competition to attract the best students has resulted in a **growing preoccupation about world university “rankings” and their evaluation criteria**. To be better positioned in the rankings and to be internationally recognized, Asian institutions have adopted targeted incentive systems to increase the number of publications.

Moreover, these rankings (especially that of Shanghai, published by Jiaotong University) have become central in determining public investments. Unfortunately, in some countries, it leads to investments being exclusively allocated to a few academic institutions to the detriment of second-tier institutions. This evolution has damaging effects since these institutions – often regional or technology schools – have some excellent specialized programs that have little visibility in the rankings. This raises the question of the complexity of assessment criteria and if they can be used to determine the best allocation of investments and promote research and innovation.

➔ Outside of Asia, the necessity for higher education is considered **a major opportunity by other international players, as evidenced by the growing number of cooperation agreements and especially the multiplication of partner institutions and branch campuses in the region (17 branch campuses just in China in 2012¹)**. Heavy bureaucratic process is nevertheless hindering these collaborations.

➔ Moreover, as these countries continue their economic growth and progressively adopt a knowledge economy, **regional actors are now the ones who assess the work force**.

As a result, governments and higher education institutions are working together towards harmonizing disparate higher education systems and encouraging student mobility through a credit transfer system.

The most important initiatives are those taken by ASEAN Association of Southeast Asian Nations; this organization intends to create a program to facilitate intra-regional mobility similar to the European model. To support this initiative, the European Union is assisting ASEAN institutions of higher learning through the interregional cooperation program EU-SHARE that provides technical assistance (setting up a framework, establishing a standardized credit system, etc.). Other initiatives are in place: for example, an exchange and co-graduation program called CAMPUS Asia between Japan, Korea and China.

1- "Observatory on Borderless Higher Education" (OBHE)

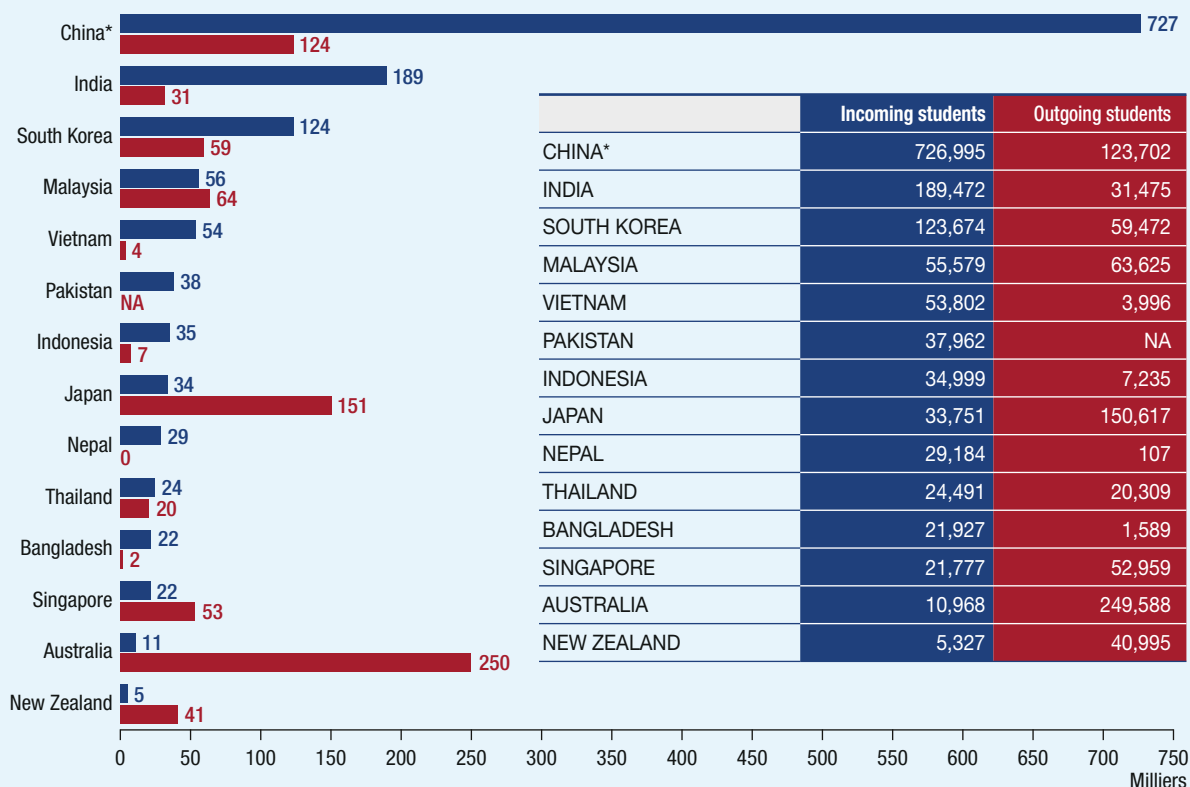
➔ Finally, the Asian system is already heavily reliant on distance learning technologies to respond to these heightened demands for higher education. **Online learning tools like MOOCs¹ can represent an affordable way to democratize education.**

If distance learning has economic benefits, it also raises new questions such as its viability as an economic model or how to measure student achievement.

For over ten years, the countries in the Asia-Oceania region have experienced major changes in student demands and have successfully implemented reforms to strengthen their higher education systems.

Today, more countries, like China, are determined to become major players on the international stage: South Korea and Malaysia, for example, aspire to attract more international students.

➔ Incoming and Outgoing mobility flows



NA: not available

Source: UNESCO 2012

* China + Macao + Hong-Kong

1- Massive open online course

➡ Distribution of Asian students in France by nationality

Country of origin	2008-2009			2013-2014			Five-year trend	
	Figures	%	rank	Figures	%	rank	Figures	change in rank
CHINA	27,112	10.2%	2	30,176	10.3%	2	+11.3%	0
VIETNAM	6,254	2.4%	9	6,235	2.1%	10	-0.3%	↓ 1
SOUTH KOREA	2,902	1.1%	25	2,715	0.9%	26	-6.4%	↓ 1
INDIA	1,525	0.6%	41	2,427	0.8%	31	+59.1%	↑ 10
JAPAN	2,156	0.8%	31	2,007	0.7%	36	-6.9%	↓ 5
MALAYSIA	712	0.3%	60	1,009	0.3%	53	+41.7%	↑ 7
TAIWAN	1,026	0.4%	49	990	0.3%	55	-3.5%	↓ 6
INDONESIA	336	0.1%	81	787	0.3%	61	+134.2%	↑ 20
CAMBODIA	596	0.2%	66	777	0.3%	62	+30.4%	↑ 4

Source: MENESR-DGESIP-DGRI-SIES 2014

➡ How to attract international students to France

More and more students in Asia are entering higher education, and yet, the proportion of Asian students in France remains low (only 17% of the total foreign student population in France while they represent 40% of all international students). This potential is untapped and the Conseil Supérieur de l'Attractivité (Strategic Attractiveness Council) has entrusted Campus France –as well as French embassies, alumni associations, and other players working to promote the image of

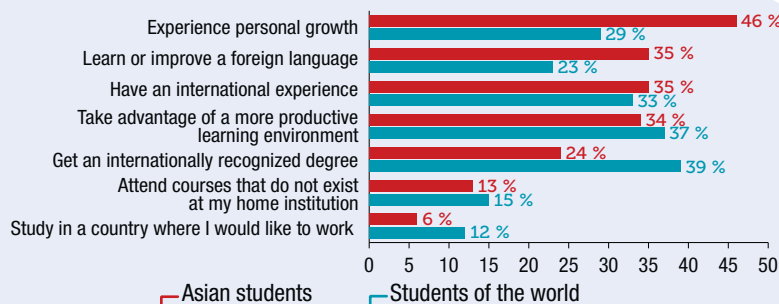
France abroad— with the task of creating a **successful communication campaign to boost the image of France among Asian students.**

Different media will be effectively adapted to target this specific audience (clips, interactive websites, etc.) and will be available in 2015. This campaign will highlight the benefits of higher education in France and the excellence of its academic programs from an innovative point of view.

Campus France Survey / TNS 2013: Focus on Asian Students

Online poll conducted by TNS from July to October 2013 with 20,000 students: 2,801 of them came from Asia (1,307 had just arrived in France, 947 had already started studying in France and 547 had completed their studies)

Reasons for coming to France



27% had already studied abroad



73% had their first study abroad experience in France

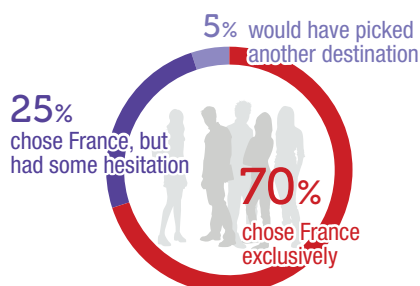
Key points

Asian students are different from other international students. First, they have specific goals for studying abroad. They are primarily looking for an experience that will help them not only to broaden their world perspective, but also to learn a language through immersion. They are much less concerned with obtaining a degree that is internationally recognized. They therefore chose France for cultural reasons. If they care about the quality of their education, this is not as much of a deciding factor as for other students. Only a quarter of them decide to come to France because of the reputation of its institutions. Nevertheless, these students particularly appreciate the cost of studying in France. For 3 out of 4 students, this is their first international experience. France is most often their top choice; these students are somewhat less likely than others to hesitate between other countries (30% vs. 45%). In order to prepare for their trip, most of them turn to Campus France, especially its website. Next are Campus France offices and antennas with an attendance of 40%. Asian students are more likely than others to get information directly from their schools and other French places.

Top 10 reasons for choosing France

1	Cultural interest for France	55%
2	Quality of French higher education	51%
3	Improve my language skills	49%
4	Cost of studies in France	40%
5	Exchange program with a French institution	31%
6	The "art of French living"	31%
7	The reputation of the institutions or the teachers in France	25%
8	My proficiency in French	24%
9	The value of French diplomas	20%
10	Study in Europe	20%

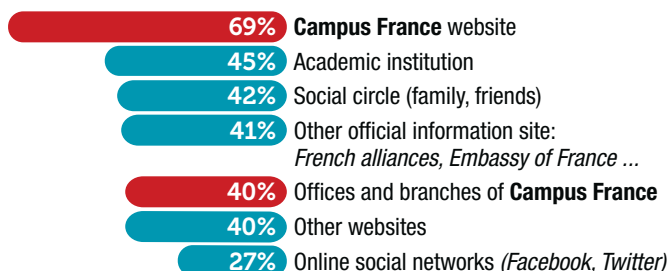
A well-thought-out decision



Main concerns of Asian students



Preferred ways of getting information



Asian students assess their study abroad experience in France

I am satisfied with my experience...

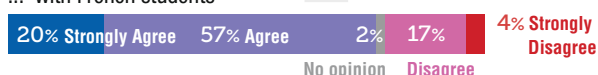
... with France in general



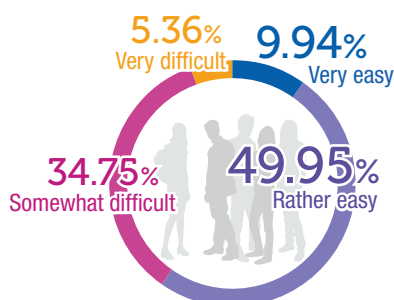
... with the host institution



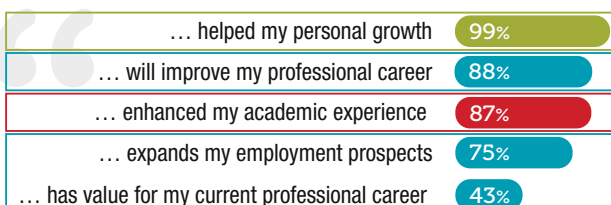
... with French students



I think that my integration in France was...



I think that studying in France...



Levels of satisfaction while in France

ORIENTATION AND INTEGRATION

How foreigners are treated in France	▲	60%
How the French treated them	●	72%
Social integration	▲	65%
Administrative procedures	▲	51%

DAILY LIFE

Quality of daily life	●	86%
"French art of living"	●	85%
Social activities	●	84%
Cultural activities	●	92%
Touristic activities	●	92%

TEACHING

Quality of teaching	●	88%
Pedagogy	●	82%
Grading	●	83%
Campus facilities	●	77%

EXPENSES

Health	●	80%
Living expenses	▲	69%
Housing opportunities	▲	55%
Housing expenses	▲	58%
Studies	●	84%

FUTURE BENEFITS

Possibility to work in France after graduation	×	41%
Value of a foreign degree	●	88%

● Points forts × Points d'amélioration ▲ Points de vigilance

Satisfaction and recommendation

I am satisfied with my stay



I would recommend France at the end of my stay



Key points

When they leave France, Asian students are by and large satisfied with the way they were treated by the French in general and by their host institutions in particular. They are a little more divided on their interactions with French students. Four out of ten students note that they had a hard time at first but most of them eventually learned how to navigate life in France.

These students clearly appreciated the quality of life and the quality of education, as well the cost of education and the quality of the health system. Their most significant challenges were housing, the cost of living, and administrative hassle.

Like other foreign students in France, Asian students leave France convinced that they have greatly gained from their experience (personal growth, rich intercultural encounters; they see studying abroad as adding value to their educational program, even to their future professional career). One downside was that, like other students, many of them regret not having been able to have a first work experience in France.

Finally, the overall satisfaction rate among Asian students reaches 92% and nearly half of them say they were very satisfied. Not surprisingly, nine out of ten students say they would recommend France as a study destination.

Campus France locations and satellite offices in Asia



Campus France Agency

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following documents:

*"Higher Education in Asia: Expanding Out, Expanding Up – The rise of
graduate education and university research", UNESCO Institute for
Statistics, 2014.*

*"Higher Education across Asia: An Overview of Issues and Strategies",
Asian Development Bank, 2011.*

*"South Asia and Higher Education Revolution and realities in the new
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