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**The International Student Mobility between
Taiwan and ASEAN Countries—The Past and
Future**

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The International Student Mobility between Taiwan and ASEAN Countries—The Past and Future

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Abstract

With the economy growing rapidly in ASEAN countries, more and more students in this area choose to study abroad, and regionalization is a significant feature of the student flows. However, there are still many obstacles when these countries try to seek for harmonization in the compatibility of their qualification frameworks. Higher education in Taiwan now also faces severe circumstances due to low birthrate and global competition, and recruiting international students is seen as a key strategy in implementing internationalization and supporting university development. In this article, the author introduces push and pull theory in explaining the student flows among between Taiwan and ASEAN countries, and to analyze the weakness and strength of Taiwan in recruiting international students. Since the ‘New Southbound Policy’ has just initiated in Taiwan in 2016, the author ends with four implications: (1) The emerging competitors in the global recruiting market; (2) The missing part of New Southbound Policy in Education; (3) The possible entry point: MRAs; (4) The future perspective of student mobility between Taiwan and ASEAN.

Keywords: ASEAN, New Southbound Policy, push and pull theory, student mobility

1. Background

Internationalization in higher education has become a hot issue these decades, not only in Asia but also in Europe and the whole world. In Figure 1., it is obvious that global higher education mobility is a rapidly growing phenomenon with over 4.6 million students seeking education outside their home countries and with estimated 13 million cross-border online students in these years (OECD, 2017). This number represents a 60 percent increase since 2000 and the greatest surge in international student enrollments in recent decades. What is more, the number is estimated to 7.2 million by 2025 (Böhm et al., 2002).

As national economies become more interconnected and participation in education expands, higher education emerges as a means to broaden students' horizons and help them to better understand the world's languages, cultures, and business methods. Higher education is becoming more international through a number of means, including distance education, international education-related internships and training experiences, cross-border delivery of academic programs, and offshore satellite campuses. Among the phenomena related to the internationalization of higher education, enrolling in a study abroad program is receiving considerable attention from students and policymakers. By providing opportunities to expand knowledge of other societies and languages, studying abroad offers important cultural and personal experiences for students, as well as a way to improve their employability in the future global labor market.

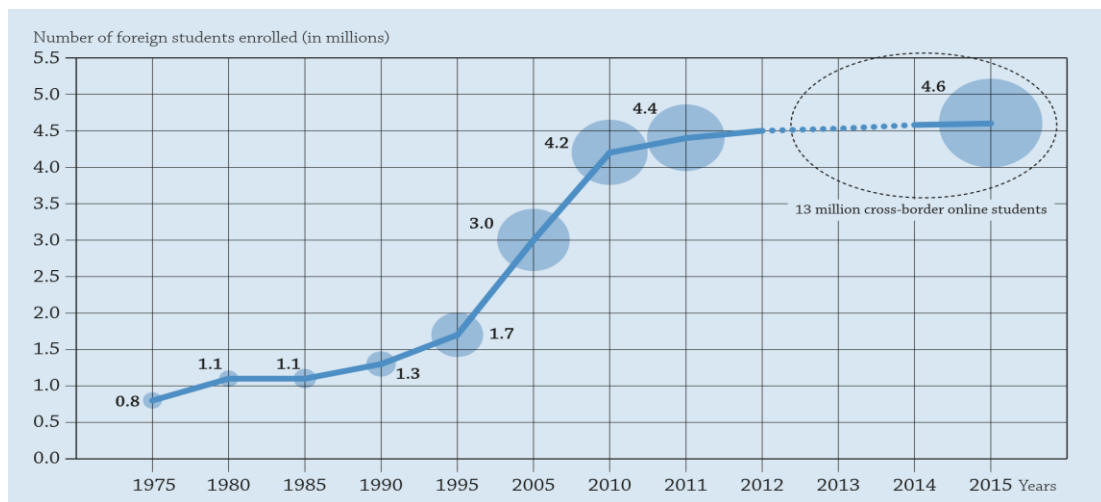


Figure 1. Number of foreign students enrolled (in million) (1975-2015)

Source: *Education at a Glance 2017*, p.295 (Figure C4.a.).

The number of cross-border activities undertaken by institutions in the developing and emerging world is on the rise. It illustrates the increasingly competitive power of higher education in these countries, especially the three BRIC countries, but not exclusively, China, India, and Russia (de Wit, 2017). It has been a global phenomenon. Efforts to internationalize higher education may pose many challenges in the future, with the trends of commercialization

and commodification which are potentially seen as threats to higher education development (Altbach and Knight 2007; Knight 2005).

The dynamic development context in Asia provides both promising opportunities and complex challenges for higher education. The long, sustained period of economic growth in this region has resulted in a rapidly growing number of middle-income countries. By 2020, only two Asian countries are estimated to remain low-income (ADB, 2014). Not surprisingly, the number of outbound students from East Asia and the Pacific is much higher than other areas, while the inbound student number in this area is relatively low. Table 1. bellowed shows, in the global market, East Asia and the Pacific is the main exporting area, while North America and Western Europe is the main receiving area (UNESCO, 2012). Obviously, this huge gap benefits the receiving countries, especially in North America and Western Europe. According to Institute of International Education, international students contributed \$39.4 billion dollars to the U.S. economy in 2016. Without a doubt, the international student recruitment has been a ‘big business’ for developed countries, whereas it may also cause the potential brain drain of sending countries.

Table 1

The number of outbound and inbound students in different areas in 2012

| Country | Outbound | Inbound | Difference |
|----------------------------------|------------------|------------------|-------------------|
| Arab States | 249,277 | 219,389 | -29,888 |
| Central and Eastern Europe | 387,245 | 321,270 | -65,975 |
| Central Asia | 120,795 | 43,782 | -77,013 |
| East Asia and the Pacific | 1,008,732 | 752,253 | -256,479 |
| Latin America and the Caribbean | 196,888 | 68,306 | -128,582 |
| North America and Western Europe | 542,654 | 2,060,749 | 1,518,095 |
| South and West Asia | 343,377 | 17,629 | -325,748 |
| Sub-Saharan Africa | 257,099 | 89,462 | -167,637 |
| WORLD | 3,572,840 | 3,572,840 | |

Note: World not specified 466,772 people

In Taiwan, since higher education new student enrolment dropped to 250,000 in 2015/16 from 270,000 the year before, and the enrollment base is projected to continue to shrink through 2019 with significant yearly reductions throughout. Taiwan has announced a plan called ‘New Southbound Policy’ to increase its international student numbers by 30,000 with a goal to host 58,000 by 2019. This initiative will not only more than double the current enrollment of 28,000, but also reflects a number of important internationalization strategies for Taiwan as well as some notable shifts in its demographics and higher education system.

2. Push and Pull Theory in explaining international student flow

Ernest Ravenstein is widely regarded as the earliest migration theorist. He used census data from England and Wales to develop his 'Laws of Migration' (1889) and concluded that migration was governed by a 'push-pull' process; that is, unfavorable conditions in one place (oppressive laws, heavy taxation, etc.) 'push' people out, and favorable conditions in an external location 'pull' them out. Ravenstein's laws stated that the primary cause for migration was better external economic opportunities; the volume of migration decreases as distance increases; migration occurs in stages instead of one long move; population movements are bilateral; and migration differentials (e.g., gender, social class, age) influence a person's mobility. Based on Ravenstein's theory, Lee further focused on showing possible migration between a place of origin and a place of destination, with positive and negative signs signify pull and push factors respectively.

Flows take place between two places, but there are intervening obstacles to these spatial movements (See Figure 2). There are many factors both in the places of origin and destinations, we could group the factors into two main categories: environmental factors, and economic and social factors. With environmental factors, we mainly discuss the climate, attitude, land resources, water resources, and location. For economic and social situations, we can compare the situations of living standard, income, employment situation, education facilities, medical services, and transportation. For intervening obstacles, we could discuss the distance and the great changing of the migrants' life, the change of lifestyle, change of productive activities, language obstacles, and loss of traditional living skills. For personal factors, we mainly focus on the migrant's age, sex, education, occupation, and income, the number of livestock, and area of grassland.

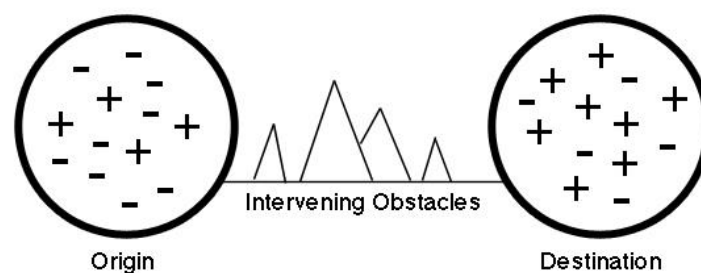


Figure 2. Origin and Destination Factors and Intervening Obstacles in Migration
Source: From 'A Theory of Migration' by Lee, 1966, *Demography*, 3(1), p. 47-57.

After Lee proposing the theory, it had been broadly used in several types of research in international student mobility issues. McMahon (1992) examined the flow of international students from eighteen developing countries to developed countries during the 1960s and 1970s, testing an outbound or 'push' model and an inbound or 'pull' model. The push model suggested the student flow was dependent on the level of economic wealth, the degree of involvement of the developing country in the world economy, the priority placed on education

by the government of the developing country and the availability of educational opportunities in the home country. His pull model suggested student attraction to a host country was influenced by the relative sizes of the student's home country economy compared to the host country, economic links between the home and host country, host nation political interests in the home country through foreign assistance or cultural links and host nation support of international students via scholarships or other assistance.

Besides, six factors have been found to influence student selection of a host country (Mazzarol, Kemp and Savery, 1997). Mazzarol and Soutar (2008) found that possible pull factors for international students could be the awareness and reputation of the host country and its institutions, personal recommendations or word of mouth, quality of education of host country institutions and parents of guardian recommendation. Other pull factors examined in a study done by Mazzarol (1998) are institution reputation for quality, market profile, the range of courses, alliances or coalition, offshore teaching programs, staff experience, the degree of innovation, use of information technology, resources, the size of the alumni base, promotion and marketing efforts. As claimed by Mazzarol and Soutar (2008) in their study about that push factors are is the perception that overseers course is superior to the local course, difficult to gain entry into the desired program in the home country, desire for better understanding of host country and long-term plan to migrate after completion of studies. These findings are further synchronized with the findings of another research done by Mazzarol (1998). Other push factor observed by Tim and Geoffrey (2002) in their study are a poor economic condition at home country, bad law and order situation, technological lag, difficulty in getting admission into any university in home country, intentions to settle in host country permanently, study programs of the area of interest are not available.

Although using push and pull theory can help us identify the factors that influence international student flows and trends between developing and developed countries, this theory is still limited in explaining the flows between developed countries, for instance, the U.S. and U.K.

3. The regionalization of student mobility in Asia

Regionalization has traditionally been viewed within the dual frames of proximity and patterns of exchange, dimensions that in turn have been conceptualized and actualized along prevailing norms of time and space. A notable evolution in the internationalization of higher education in the last decade has been the increasing emphasis on regional level collaboration and reform initiatives. The higher education regionalization scenario in Asia is complex and evolving. To date, most efforts towards enhancing higher education regionalization have been within Southeast Asia, but not exclusively (Knight, 2008). Southeast Asia, with large

populations of young and optimistic consumers, is seen as a significant emerging market for many developed countries. It is such an area full of opportunities that drives the student and talent flows within and outside this place.

Although the U.S. and Europe are big magnets to attract international students for a long time, when we look into specific Asian countries, we will still find the regionalization phenomenon of student mobility, which means the flows might not be so 'Western-oriented' as we thought. Especially starting from 2016, with the global rise of nationalism and protectionism in several countries, both the U.S and the U.K. become less attractive to international students. For the U.S., the Open Doors survey shows a decline in new international students starting in fall 2016 (Open Doors, 2017). Besides, the higher education institutions (HEIs) that responded to another 'snapshot' survey reports an average decline in new international students in fall 2017 of 7 percent.

Figure 3. below shows the trends (1999 and 2007) in the number of students from Asian countries studying in other Asian countries, revealing a sharp increase in international student mobility within the region. This tendency points to an increase in student exchanges within East Asia, suggesting that a tendency toward the 'East Asianization of East Asia' (Kuroda, 2014) in the field of the international education exchanges, as in other areas. Obviously, Asia is the largest provider of globally mobile students, and the intensification of intra-Asia student mobility is leading to the regionalization of student flow. Examining the pattern of inflow students into Asia, the majority of international students for every country is intra-regional, including Japan. As said before, nowadays, outbound destinations for Asian students can range from traditional players such as European countries and North America to emerging providers such as China, Singapore, and Malaysia (Chan, 2012). The regional networks in East Asia have been initiated by the national governments or regional communities and they symbolize regionalism that is based on the member countries' political and economic strategies, such as the ASEAN University Network (AUN), SAU of South Asian Association for Regional Cooperation (SAARC), and Campus Asia are examples of projects reflected by the member countries' interests and autonomy.

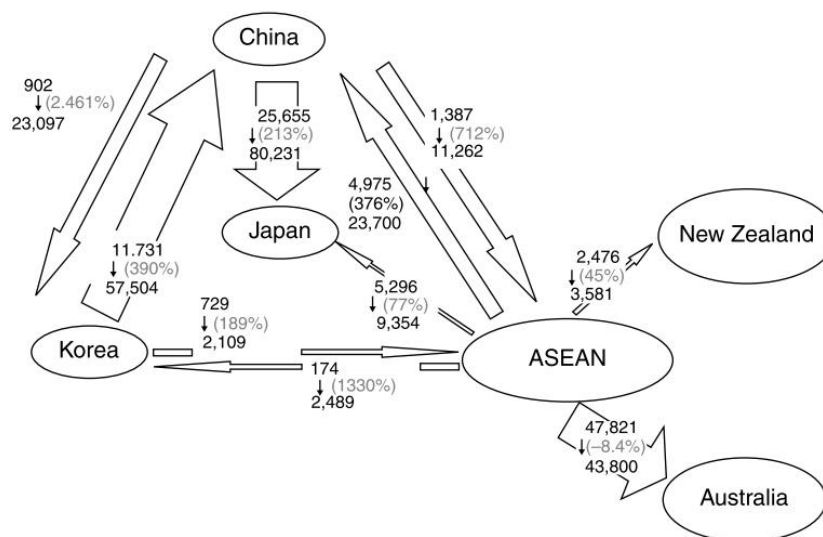


Figure 3. Growing Number of Students Move from Asia to Asia.
Source: Kuroda, 2014 (p.145).

However, as higher education systems across Asia look ahead, they are still facing four overarching challenges: (1) maintaining and improving higher education quality, even in the face of serious financial constraints; (2) increasing the relevance of curriculum and instruction at a time of rapid change in labor market needs; (3) increasing and better utilizing the financial resources available to higher education; and (4) balancing the continued expansion of access to higher education with greater attending to equitable access and inclusiveness of higher education to support inclusive development and economic growth (ADB, 2011).

In Europe, the higher education systems are in the midst of the Bologna Process which is an initiative that aims to harmonize regional higher education and to establish and further develop the European Higher Education Area (EHEA). The Bologna Process is expected to ensure comparability and compatibility between national higher education systems in order to make Europe more visible and competitive as a region. Learning from the Bologna process and Bologna Follow-Up Group (BFUG) and related Working Groups have provided a model for implementation of harmonization mechanisms for HE, across Association of Southeast Asian Nations (ASEAN) member states and in the Asia-Pacific region as shown by the fact that both UMAP Credit Transfer Scheme (UCTS) and ASEAN Credit Transfer System (ACTS) are modeled after European Credit Transfer System (ECTS).

Besides the initiatives above, learning opportunities have been provided under Erasmus Mundus as well, an EU cooperation and mobility program in the field of higher education, which has allowed more than 2,000 ASEAN students to benefit from mobility programs to European HEIs. In addition, the ASEAN-EU Network program and Asia-Link program, both running from 2002 to 2006, also offered opportunities to promote cooperation, built networks and strengthen capacity in higher education in the region. Table 2 showcases the pattern of

outbound mobility of students across ASEAN. It is clear that the huge outflows of students to conventional higher education markets exist, particularly to Australia, the U.S., the U.K., and the greater EU region. When we focus on Asian region, there are also several corridors worth noting: Thailand is the top destination for Myanmar and Cambodia students, while Malaysia is also attractive to Singapore, Indonesia, and Brunei. The intra-ASEAN cross-border education and student flows become new trends.

Table 2

Top 5 host countries of students from ASEAN countries

| Country | 1 st | 2 nd | 3 rd | 4 th | 5 th |
|------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Malaysia | UK | Australia | US | Egypt | Jordan |
| Indonesia | Australia | US | Malaysia | Japan | Egypt |
| Vietnam | US | Australia | Japan | France | UK |
| Thailand | US | UK | Australia | Japan | Egypt |
| Philippine | Australia | US | UK | Saudi Arabia | New Zealand |
| Myanmar | Thailand | United States | Japan | Australia | Malaysia |
| Singapore | Australia | UK | US | Malaysia | Canada |
| Brunei | UK | Malaysia | Australia | Egypt | Saudi Arabia |
| Cambodia | Thailand | Australia | France | US | Vietnam |
| Lao PDR | Vietnam | Thailand | Australia | Japan | Korea, Rep. |

Source: Retrieved from <http://uis.unesco.org/en/uis-student-flow>

The higher education system in ASEAN are expected to concentrate on improving the quality and adaptability of education within the region, which include providing technical and vocational education and training (TVET); establishing regional skills recognition framework; increasing literacy and integration of information and communication technology to promote lifelong learning; promoting university networking, student and staff exchanges, and research clusters; teaching common values and cultural heritage; developing and offering courses on ASEAN studies and languages; enhancing English language proficiency for ASEAN citizens; and applying science and technology to sustainable development (Shaeffer, 2014). From a comparative perspective, of three regional organizations—University Mobility in Asia and the Pacific (UMAP), ASEAN University Network (AUN), and the Regional Center for Higher Education and Development (RIHED) under the Southeast Asian Ministers of Education Organization (SEAMEO), Nguyen (2009) conceded that the process of ASEAN higher regionalization through these organizations is a step-by-step process best taken gradually rather than as a massive Bologna Process-like undertaking. Morshidi Sirat et al. (2014) also referred to the regionalization process as ‘harmonization’ rather than regionalization, as they believe that finding commonalities across higher education systems should be the basis of developing standards and practices for the region’s higher education development.

The drive toward harmonization of ASEAN higher education seems to be on track, and member signatories of the ASEAN community are determined to move forward. The increased cooperation in education evidenced by all of the combined actions detailed provides an important background for the next chapter in the process of ASEAN higher education integration. The ASEAN community recognizes the need to create a common but not an identical or standardized ASEAN Higher Education Area (AHEA) that would facilitate the comparability of degrees and the mobility of students and faculty within Asia. While recognizing the fact that national and institutional variations in curriculum, instruction, programs, and degrees, resulting from historical, political, and socio-cultural influences, are bound to exist, it has managed to create a common credit transfer system degree structure, credit, and quality control structures.

Credit transfer systems designed to be used specifically among universities in ASEAN member states is a fairly recent development. Traditionally, recognition of periods of studies abroad involving the ASEAN region has been carried out on a case-by-case basis. Although no global credit transfer system exists for the ASEAN region at the moment there has been some systems implemented that help streamline the credit transfer process. We can identify three major credit transfer systems in use in the region: the AUN ASEAN Credit Transfer System (AUN-ACTS), the University Mobility in Asia and the Pacific Credit Transfer Scheme (UMAP-UCTS), the SEAMEO-RIHED Academic Credit Transfer Framework. Of these, the AUN-ACTS is the only credit system exclusive to intra-ASEAN mobility. It is a credit transfer mechanism that was launched in 2011 to facilitate regional student mobility, harmonization of standards and quality assurance among ASEAN institutions. In 2014, it enables university students to apply for 19,549 courses offered across ASEAN universities (Hénard, Bonichon, Maulana, Iqbal & Oratmangun, 2016a). It also allows students to undergo an academic evaluation that offers grading scales without conversion. These systems have been created to meet different motivations and universities can use several credit transfer systems. For instance, University of Indonesia uses ACTS and UCTS, as well as ECTS.

From 2005 to 2015, ASEAN Member states signed mutual recognition arrangements (MRAs) in 8 sectors, inclusive of medicine, architects, dentistry, nursing, tourism, and engineering (as shown in Table 3). The agreements focus on free mobility for specific occupations. The MRAs aim to facilitate the alignment of national standards with international standards within the ASEAN region. They are designed to support information sharing and harmonization. In this way, the MRAs provide an important policy framework to recognize equivalent degree structures and resulting qualifications in designated fields.

Table 3
ASEAN Mutual Recognition Arrangements in Services

| No | MRA | Signing date |
|----|--|--------------|
| 1 | MRA for Engineering Services | 9 Dec 2005 |
| 2 | MRA for Nursing Services | 8 Dec 2006 |
| 3 | MRA for Architectural Services | 19 Nov 2007 |
| 4 | Framework MRA for Surveying Qualifications | 19 Nov 2007 |
| 5 | MRA for Medical Practitioners Services | 26 Feb 2009 |
| 6 | MRA for Dental Practitioners Services | 26 Feb 2009 |
| 7 | MRA for Accountancy Services | 26 Feb 2009 |
| 8 | MRA for Tourism Professionals | 9 Nov, 2012 |

Source: From Teter & Dhirathiti (2016).

However, the current reality is that little is known about the implementation and governance of these agreements, including how they interrelate with national qualification frameworks (NQFs) of each countries and the whole ASEAN Qualifications Reference Framework (AQRF), which have not been articulated yet. Thus, further research are needed to better understand these relationships (Teter & Dhirathiti, 2016). According to Asia Development Bank survey report in 2017, these agreements reached limited effect (ADB, 2017). Insufficient recognition of higher education among countries in a region might be an obstacle which hinders their intention of students to study abroad, even they just want to choose a neighbor country. Although ASEAN is trying hard to establish AQRF as a platform for student mobility, the lack of efficiency and integration still remain problems. In brief, the mobility of professionals in Asia has endangered by lack of effective policy solutions.

In global level, although the comparability between regional systems (e.g. EHEA and ASEAN) is a demanding yet prospective objective, the lack of agreed quality assurance, qualifications frameworks, and credit exchange procedures, presented many challenges to student mobility in both programs in terms of credit transfer and degree recognition among participating HEIs. Similarly, in ASEAN, which is characterized by diverse national educational policies and cultures, the issue of harmonizing educational processes and outcomes is gaining importance. When we look at the outbound student number in ASEAN countries, we can find out that the percentages of intra-ASEAN students in each countries are relatively low, excluded Lao, Cambodia, and Myanmar (See Table 4).

Table 4
Outbound students in ASEAN and intra-ASEAN mobility for Higher Education Level

| Country | Total Outbound Students | Intra-ASEAN Mobility | Percentage |
|--------------|-------------------------|----------------------|--------------|
| Malaysia | 56,260 | 2,766 | 4.92% |
| Vietnam | 53,546 | 2,003 | 3.74% |
| Indonesia | 39,098 | 6,579 | 16.83% |
| Thailand | 25,517 | 1,036 | 4.06% |
| Singapore | 22,578 | 855 | 3.79% |
| Philippines | 11,454 | 507 | 4.43% |
| Myanmar | 6,388 | 1,833 | 28.69% |
| Lao PDR | 4,985 | 3,184 | 63.87% |
| Cambodia | 4,221 | 1,468 | 34.78% |
| Brunei | 3,361 | 309 | 9.19% |
| TOTAL | 227,408 | 20,540 | 9.03% |

Source: Hénard, Bonichon, Maulana, Iqbal & Oratmangun (2016a).

Countries in Southeast Asia have pursued regional cooperation on harmonization of higher education by focusing on the comparability of degree programs, credit transfer system development, quality assurance frameworks and standards, and faculty development for teaching and research, among others (ADB, 2008, 2012; Sarvi, 2011). Lessons learned in Southeast Asia can and should be embraced by other countries in Asia. As the rest of Asia moves forward, its demand for broad and deep cooperative frameworks in the region to facilitate the sharing of experiences and knowledge on important new and emerging development issues will increase and require continued attention (Sarvi, 2015).

From the push and pull theory perspective, key factors can be observed to drive student mobility in the ASEAN region. Economic factor is always considered to be one of the main key factors that pushes ASEAN students choosing to study abroad. Apart from economic growth, there are also other factors (Hénard, Bonichon, Maulana, Iqbal & Oratmangun, 2016a). Firstly, the social and cultural background counts. This factor is most apparent for example in students from Brunei Darussalam to Malaysia and Indonesia, and students from the CLMV (Cambodia, Lao PDR, Myanmar and Vietnam) countries going to Thailand. Second, costs and exchange rate are also factors determining the location for studying abroad. For example, the cost of living in Malaysia is lower than in Singapore, this may drive Indonesian students to choose Malaysia as one of the favored study abroad destinations. Thirdly, English as the medium of instruction is also one of the drivers for intra-ASEAN mobility. Malaysia and Singapore are the two top destinations due to the availability of English-taught courses and the perceived quality of their higher education institutions.

Tran (2013) pointed out, for Vietnam students, they viewed open-mindedness as the

strongest factor pushing them studying abroad. They wanted to know what differences exist between Vietnam and other countries in culture and language to strengthen their mind as well as approach advanced technology and education overseas. The second factor was the career demand in getting higher degrees servicing for their previous jobs. Followed by the quality of education overseas and chances to practice English. Concerning push factors from other host countries, they are English language proficiency, financial aid, and granting study Visa. Regarding pull factors, Tran concluded that full scholarships, the prestige of universities, economic and educational cooperation, and the kind and safe environment in Taiwan are the main factors attracting Vietnam students to study in Taiwan.

4. Higher education internationalization in Taiwan

After Taiwan joining the World Trade Organization (WTO) in 2001, ‘Internationalization’ has become an important issue for all the universities. The higher education system started to face many inner and external pressures, such as the challenges of global and regional competition, recruiting international students, the needs of English taught programs, the demands on enhancing competitiveness, the loss of student enrollment, and etc.. All the pressures have great impacts on the universities enormously.

In response to regional and global competition, Taiwan’s government has reformed its higher education system with a particular focus on academic programs, regulation, financing, and internationalization. Since 2000, the Ministry of Education (MOE) has launched three major internationalization programs, including ‘Enhancing Global Competitiveness Plan’, ‘Development Plan for World-Class Universities and Research Centers of Excellence’, and ‘Recognition of International Accreditation’. The objective is to strengthen Taiwan’s position and turn the nation into a cultural superpower and higher education hub (MOE, 2015). In 2002, the MOE first launched the ‘Enhancing Global Competitiveness Plan’, which intended to foster international exchange and increase the number of foreign students studying in Taiwan. The goal was to welcome 100,000 international students by 2016. Universities and colleges were encouraged not only to offer scholarships and courses taught in English but also to develop collaborative programs through global partnerships. Joint and double degree programs gained popularity in Taiwan’s universities (Hou, 2016).

In the past two decades, in order to meet the needs of society and fulfill the political pledge of ‘one national university in each county’, Taiwan’s Ministry of Education led the expansion in the number of colleges and universities by upgrading junior colleges and building new universities in Taiwan, raising the total number of Higher Education Institutions (HEIs) from 105 in 1984 to 159 in 2014 (Chang & Shaw, 2016). The University Entrance Exam admission rate was close to 97 percent. On one hand, almost every senior high school graduates can go to university; on the other hand, the higher education resources have also been diluted. In addition,

facing the crisis of low birthrate¹ from inside and the international competitiveness from outside, most of the HEIs set their hope on recruiting more international students.

According to the Ministry of Education Award for University Faculty to Promote Internationalization Plan, Taiwan's HEIs were encouraged to recruit international students, increase international exchanges, and improve universities' international competitiveness. The plan aimed to facilitate university internationalization by identifying institutional strength and a strategic plan, increasing the enrollment ratio of foreign students, strengthening curriculum reform, and enhancing international cooperation and collaboration (Chou & Ching, 2012). In 2010, the government approved HEIs to recruit Chinese degree-seeking students which then brought 9,327 students in 2016. Until 2017, Taiwan has achieved 116,416 international students. However, only 25 percent of the students are from ASEAN countries at present (See Table 5), the most students are from Malaysia, followed by Indonesia, Vietnam, and Thailand. We can conclude that the progress of higher education internationalization in Taiwan is mainly driven by two forces: the lack of student enrollment and global competition. For both government and HEIs, increasing the number of international students become the most important goal in implementing internationalization.

With the emerging of the Southeast Asian economies today, ASEAN countries are not what they were ten years ago. President Tsai Ing-Wen, who was elected as president in 2016, asserted that Taiwan should have stronger relationships and cooperation with ASEAN countries. The new government launched the 'New Southbound Policy' (NSP) in 2016 which aimed to shift the focus from the past endeavors to simply draw foreign students to Taiwan's education industry to a new target of building people-to-people links. It will take a people oriented approach and aim to foster bilateral exchange and mutual resources sharing with Southeast Asian countries.

¹ In 2010, the fertility rate was 0.89 which was the world's lowest. The population is expected to start shrinking in the next 15 years.

Table 5
The number of international students from ASEAN countries in Taiwan (2010-2016)

| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 |
|------------|-------|-------|-------|--------|--------|--------|--------|
| Malaysia | 5,836 | 7,256 | 8,530 | 10,374 | 13,024 | 14,946 | 16,051 |
| Indonesia | 2,279 | 2,520 | 2,799 | 3,223 | 3,455 | 4,394 | 5,074 |
| Vietnam | 3,469 | 3,916 | 3,915 | 3,641 | 3,681 | 4,043 | 4,774 |
| Thailand | 1,109 | 1,287 | 1,250 | 1,601 | 1,557 | 1,481 | 1,749 |
| Philippine | 352 | 429 | 480 | 570 | 545 | 533 | 658 |
| Myanmar | 725 | 560 | 449 | 419 | 486 | 579 | 645 |
| Singapore | 232 | 331 | 348 | 452 | 603 | 747 | 630 |
| Brunei | 9 | 17 | 14 | 16 | 31 | 25 | 37 |
| Cambodia | 6 | 9 | 6 | 4 | 3 | 4 | 10 |
| Lao PDR | 2 | 3 | 2 | 5 | 5 | 4 | 6 |

Source: From Department of Statistics, Ministry of Education.

In the education sector, the MOE has established a cross-departmental New Southbound Policy Task Force while planning to earmark a budget of NTD 1 billion for the following three objectives (MOE, 2016):

(1) Market: To offer quality education and professional training to domestic, ASEAN and Southeast Asian youths

Strengthen Taiwanese students' capabilities in economic and trade management, cultural literacy, and Southeast Asian languages to help them better understand the ASEAN countries. Offer higher and vocational education to students from the ASEAN region and South Asia for them to learn about Taiwan's development experiences, study the Mandarin language, and receive technical training.

(2) Pipeline: To expand bilateral exchange of young scholars and students

Attract outstanding students of different academic levels from the ASEAN region and South Asia to Taiwan for study or research. Send Taiwanese students to ASEAN and South Asian countries for a deeper understanding of these regions. Enhance bilateral sports exchanges with the targeted countries through school collaborations or sporting events.

(3) Platform: To build a platform for bilateral educational cooperation

Plan and establish a platform for promoting strategic talent cultivation geared towards the New Southbound Policy. Promote the Taiwan Connection plan. Facilitate bilateral alliances of higher education institutions.

The MOE is going to equip new immigrants' children with Southeast Asian language skills and internship experience; to cultivate a deep understanding of Southeast Asian languages,

cultures, and industries among university teachers and students; to cultivate professional, practical and Mandarin language skills of ASEAN and South Asian students. Besides, the government also want to attract more outstanding Southeast and South Asian students to Taiwan for study or research, some of them can be granted by government. Furthermore, several platforms for communication, such as Taiwan Connections, will also be set up for bilateral educational cooperation. Furthermore, some degree programs through on academia-industry cooperation and non-degree technical training programs for ASEAN and South Asian students are planning to offer from 2017.

What would be expected and evaluated in NSP? First, the number of foreign and overseas compatriot students from Southeast Asian and South Asian countries in Taiwan grow by 20 percent each year, to reach 58,000 by 2019. Subsidies will be provided to an extra 4,000 Taiwanese students for their study, research, internship, and training in industrial, academic, research, and business institutions in ASEAN and South Asian countries in 2017. In addition, NSP also aims to cultivate top-quality talent to facilitate the deployment of industrial business, through an emphasis on talent cultivation and building links with industries; to nurture children of the new immigrants, in the hope of building friendship and accumulating social capital with ASEAN and South Asian countries; to help Taiwanese colleges and universities forging international links, in the hope of making these higher educational institutions more international; to make it possible for outstanding ASEAN and South Asian graduates to pursue their career in Taiwan, thereby improving the availability of manpower in industries; and to promote bilateral sports exchanges with ASEAN and South Asian countries, thereby deepening cooperation in sports between Taiwan and the targeted countries.

Although Taiwan's higher education bears a relatively high reputation in Asia, the number of international students, especially the students from ASEAN countries, is comparatively low in the region. There might be several threats:

(1) Asia is a red sea market for international student recruitment

As seen in Table 2, it is clear that the U.S., the U.K., and Australia are the leading destination countries for ASEAN students. For the U.S., it has recruited 1.18 million international students in 2016, which was 1.04 million in 2015. 40 percent of the students are in STEM (Science, Technology, Engineering, Mathematics) field and 77 percent of the international students were from Asia². The deregulation of immigration law plays an important role in attracting international students to stay in the U.S. after they graduate. In the past, there are many foreign Ph.D. with engineering background employed in the U.S. to fill the need of talents in STEM fields. In 2012, considering the decreasing trend of STEM talents staying in the U.S. and the lack of STEM talents in the future, the U.S. government has amended the Optional Practical

² The 1st is China: 355,000; the 2nd is India: 194,000.

Training (OPT) duration from one year to twenty-nine months for STEM talents.

For Australia, its ‘National Strategy for International Education 2025’ sets out a 10-year plan for developing Australia’s role as a global leader in education, training, and research. The strategy and its goals and actions have been developed looking through three lenses: the benefits and opportunities for students, for Australia, and for the world. This balance is essential to ensure that they continue to meet the needs of students, business and industry while they grow. The strategy is built on three pillars: Strengthening the fundamentals, Making transformative partnerships, and Competing globally.

Besides, establishing international branch campuses in Asia is one of the important strategies of developed countries in recent years. For example, there have been 16 prestigious universities establish branch campuses in Singapore; 10 in Malaysia; 40 in the United Arab Emirates; 52 in China. The Republic of Korea has planned to introduce 10 universities by 2019, and Vietnam also Royal Melbourne Institute of Technology in 2000. Although Taiwanese government had the intension to invite foreign universities to setup branches in Taiwan, finally hindered by outdated laws, limited lands and funds. Some of the Taiwanese prestigious universities are also willing to establish branch campuses abroad, for example National Taiwan University is planning in Thailand. However, it is believed to cost a lot of money in maintaining faculties, personnel, and resources, which are challenging to a single university.

(2) China’s development and magnet effect

Base on a report ‘Counting the Cost: Financing Asian higher education for inclusive growth’ from the Asian Development Bank (ADB, 2012), China enrolled more than 240,000 international students – an almost six-fold increase over 1998 and around 40 times more than in 1988, when the country was first opening up to the outside world. Nowadays, according to the statistics from Ministry of Education in China, there were more than 440,000 international students studying in China in 2016 while the number was about 395,000 in 2012. China has become the biggest study abroad destination in Asia. Students from ASEAN countries are from about 50,000 in 2010 to more than 80,000 in 2016. China has been devoted to making connections with ASEAN countries, doing promotion in Chinese learning and establishing Confucius Institutes in universities in Southeast Asia. Moreover, China and ASEAN had set the year 2016 as ‘ASEAN-China Educational Exchange Year’ and the main theme was ‘Education First, Make Dreams Come True Together’. In recent years, there have been about 300 exchange programs among China and ASEAN countries. Moreover, China has set the most ambitious goal of all: to become the largest provider of education to outwardly mobile Asian students, with 500,000 enrolments in schools, colleges and universities (Eastwood & Watson, 2015).

In 2013, the Chinese government announced a massive development and foreign investment framework known as ‘One Belt, One Road’ (OBOR). An invocation of the traditional Silk Road

trade routes between Asia and Europe, OBOR aims to leverage China's massive production and financial capacity through new projects and partnerships throughout Asia, Europe, and Africa. China has signed deals with 46 countries, regions on mutual recognition of academic degrees. Among these countries, 24 are along the routes of the Belt and Road Initiative: eight from Central and Eastern Europe, five from Southeast Asia, five from Central Asia and three from the Commonwealth of the Independent States, one from South Asia, one from East Asia and one from North Africa. Besides, the launch of the Asian Universities Alliance (AUA) in Beijing on 29th April, 2017 further represents a significant milestone in the changing geopolitics of global higher education. The alliance is comprised of 15 institutions from 14 countries across the region. It will promote the mobility of students, academics, and administrators among all members, and strengthen research collaboration and joint innovation projects. Moreover, the organization provides members with a forum for high-level dialogue and the development of new Asian higher education strategies (Gunn & Mintrom, 2017).

However, under the recent political circumstances between China and Taiwan, Taiwan would be difficult to join OBOR and Asian Infrastructure Investment Bank (AIIB). In a sense, it is not optimistic to see OBOR as an opportunity for Taiwan but rather than an unpredictable risk. In the short term, Taiwan cannot share the economic benefits with China, while in the long term, if OBOR successfully integrates most of the economies into a semi-regional trade organization in this area in the future, Taiwan would face more pressures from being excluded in OBOR agenda.

In fact, not only China, several Asian countries also set ambitious goals on recruiting international students which are strong competitors to Taiwan in this region. For example, Malaysia wants 200,000 international students by 2020; Japan has a 300,000 goal by 2020; the Republic of Korea aims for 200,000 by 2020 as well.

(3) Taiwan's weakness in recruiting international students

A. Teaching in Chinese

Taiwan is a Chinese learning environment, most of the courses in universities are taught in Chinese instead of English. However, even it could be an obstacle for attracting international students studying in Taiwan, whether teaching in English or not is still in debate in many universities. Tran (2013) states that half of the Vietnam participant students thought that incomplete international programs were their big challenge as studying in Taiwan. They said that programs for international students were not international enough since not all courses were taught in English. The situation also happens to Indian (Tsay & Chen, 2015) and Thailand students (Tsay & Hsu, 2013). Although some of the research universities are increasing their

number of English-taught programs, it is still difficult for the rest universities to have more English taught programs, which means teaching international students learning Chinese is an alternative way to assist them to immerse in their studying in Taiwan.

B. Insufficient connections with higher education systems in ASEAN countries

Although Taiwanese degree could be recognized in most of the countries in the world, however, merely India and Malaysia can officially mutual recognition of higher education degrees, and there are only five countries (Indonesia, Philippine, Thailand, Malaysia, and Vietnam) in Southeast Asia have official educational agreements with Taiwan. In addition, Taiwanese government is lack of intensive studies in international qualification frameworks and long-term plans on integrating with AQRF or any other NQFs. However, it will directly affect the development of higher education internationalization and regionalization, and degree recognition when a student graduates from Taiwan and wants to find a job in his home country.

Regional trade areas, such as ASEAN-China Free Trade Area (ACFTA) and ASEAN Australia New Zealand FTA (AANZFTA), stress on the movement of natural persons which is one of the four ways through which services can be supplied internationally. If Taiwan does not engage in building its national qualification framework and integrating with ASEAN countries, it would be difficult in qualification recognizing and lead to obstacles in student and talent mobility in the future. Furthermore, it will also have an indirect influence on recruiting international students for Taiwanese universities.

5. The strengths of Taiwan's higher education in Southeast Asia

Taiwan's strengths in many academic fields, departments, and programs, its established research centers and institutes providing high-quality research centers and institutes, and its well-established cooperation with countries in Southeast Asia make Taiwan the choice of many students from Southeast Asia. Taiwan's higher education has become an international education export commodity, with much interaction with the higher education systems in Southeast Asian countries.

(1) Existing strong relationship with ASEAN countries

Although there are no diplomatic relations between Taiwan and ASEAN countries, there have already been rich exchanges in labor force, business, education, culture, and tourism for several decades. Especially from the 1980s to 1990s, Taiwan was the biggest foreign investment origin country. Besides, emerging from the 1990s, there were transnational marriages between Taiwan and ASEAN countries. According to the Ministry of Interior, there are about 145,000 foreign spouses from ASEAN countries and the number of children of those new immigrants has reached 360,000 in 2016. It is estimated that the number of children of those new

immigrants will account for 13.5 percent in the 25-years-old generation in 2030. They who possess bilingual and cultural advantages are seen as vital resources and roles in building deeper relationships with ASEAN countries for Taiwan.

(2) High-quality vocational education system

Most of the strategies on recruiting international students of developed countries are based on their own national or educational strengths. For Taiwan, vocational education is one of the featured advantages that many developing countries may want to learn from Taiwan since it meets the needs of ASEAN countries in cultivating future workers in optimizing basic constructions and service industry. So far, several ASEAN countries have cooperation with Taiwan in technological and vocational education. For example, a cooperation memorandum in vocational education with Vietnam, DIKTI 3+1 project with Indonesia to send lecturers to universities in Taiwan for studying Ph.D. degree.

(3) Higher education quality and affordable tuition fee

According to the QS Top 100 universities in Asia ranking, 12 universities were from Taiwan. For those non-English speaking countries, this was a great achievement to Taiwan. In light of some researchers (FICHET, 2015; Tsai, Li, & Lu, 2014), international students in Taiwan indicated that 'High-quality academic environment' was one of the main reasons for them to choose Taiwan as their study destination. In 2007, the Institute of Engineering Education Taiwan (IEET) became a member of Washington Accord, all the members can mutual recognize their accredited degree of engineering and technology of universities, including the US, Canada, Australia, New Zealand, the UK, Ireland, South Africa, Hong Kong, Japan, Republic of Korea, Singapore, and Malaysia. Turkey and Russia also became members in 2014. Currently, there have been 546 departments in 84 universities joining IEET accreditation. In addition, the Federation of Engineering Institutions of Asia and the Pacific (FIEAP) also invited Taiwan to assist them to establish recognition guideline for ASEAN countries in 2010. Regarding the tuition fee, comparing with other popular countries and taking public university as an example, the higher education tuition fee in Taiwan is only one-fourth of the US; one-sixth of Japan; one-eighth of the UK which is affordable to many students in ASEAN countries (MOE, 2016).

(4) Safe environment, similarity in culture and society

According to a survey conducted by FICHET (FICHET, 2015), it is broadly recognized by international students that Taiwan owns a safe and reliable environment. In fact, Taiwan was ranked the second safest country in the world in 2015, according to a survey released by U.S. lifestyle magazine Presscave. It was reported that Taiwan is a perfect place to lead a safe life, boasting many beautiful scenic attractions. People in Taiwan are kind-hearted, friendly and help you before you approach them. Besides, The MasterCard-Crescent Rating Global Muslim

Travel Index (GMTI) 2016 ranked Taiwan as the seventh-most popular destination for the Muslim tourist market. Muslims will also enjoy prayer rooms provided at Taipei City Hall Station, the capital city's main train station, and in other public areas. Additionally, Taiwan is not only geographically close to Southeast Asia but also shares the similar cultures and societies with ASEAN countries (Ghu, 2013; Tsai, Li, & Lu, 2014) which are main factors that attract international students to choose Taiwan.

In sum, Taiwan possesses a relatively high-quality higher education and suitable living environment which are important for recruiting international students. It still needs to improve a lot in the internationalization of higher education in many infra aspects, for example, the bilingual or multi-lingual teaching and learning environment, and the reformation of curriculum design. To make it really effective, it should simultaneously start from not only governmental but also institutional levels.

6. Implications

There are more than 1 million students study abroad from East Asia and Pacific, but when it comes to student mobility in Asia, the most significant problem may lie in the incomplete and non-comparable national qualification frameworks (NQFs) in Asia. ASEAN member states are seeking cooperation through signing MRAs. However, unlike EU, ASEAN states are too diverse in economy, culture, religion and many other aspects. Lacking shared-value, similar languages, powerful executive and mediation organization, mutual understanding and the support of local people, it's really difficult for ASEAN states to pursue integration. Until now, most Asian countries lack comprehensive NQFs and have not yet established the national qualification board, not to mention a comparable AQRF. It is an obstacle for students' regional mobility. That is to say, students are forced to leave Asia to pursue degrees or find better jobs.

In this article, we analyze several trends and existing problems in student mobility between ASEAN countries and Taiwan for reminding the government and universities in Taiwan to pay much attention to not only recruiting international students but also few more important issues as concluded below:

(1) The emerging competitors in the global recruiting market

Many developed countries are putting huge resources and efforts on recruiting international students, with flexible Visa and immigration policies. Although the quality of higher education in Taiwan has a decent reputation in Asia, the number of international students from ASEAN countries is still relatively low in Taiwan. However, in Taiwan, insufficient international environment and number of English-taught programs, incomparable higher education system, and indecisive strategies on establishing foreign university branch campus hinder the momentum of recruiting more international students in this area which are the hidden worries

to NSP. In order to attract more international students and compete with other countries, Taiwan needs to strategize its advantages and disadvantages, to clearly identify the push and pull factors between Taiwan and ASEAN countries, and to rebuild the paths of international student flow.

(2) The missing part of New Southbound Policy in Education

Although it may be too early to judge the outcomes of NSP at present, we can still review its policy goals and contents. It can be found that NSP mainly focuses on recruiting international students, the government allocated 72 percent of the budget on opening programs and providing scholarships to South and Southeast Asia students. It actually reflects the worries of the universities under the pressures of decreasing enrollment owing to low birthrate, but may ignore the need for universities to improve their international environment. A country cannot only rely on scholarships or education fairs to attract international students. Without better infrastructures, it would be difficult for universities to recruit international students in a sustainable way.

Besides, many superficial activities between Taiwan and ASEAN countries were also planned in NSP. For example, facilitating the forging of bilateral alliances between Taiwanese colleges and universities and higher educational institutions in nations of ASEAN. However, without deeper mutual understandings of higher education, qualification frameworks, and industry development of ASEAN countries, it may invalidate the effects of NSP. Taiwan should devote in more practical studies and research, not only about itself but also ASEAN countries, to find its unique niche in the value chain of the regional higher system.

(3) The possible entry point: MRAs

If Taiwan begins to connect with the ongoing AQRF as soon as possible, it is believed to benefit the international talent flows among HEIs and industries. Unfortunately, there has been no sign regarding this issue happened yet. Indeed, establishing a NQA will take a long time and efforts, making the transfer and building the comparability even require more. Alternatively, since ASEAN has already had eight MRAs for talent mobility in different fields, they are sure to be the potential fields that Taiwan could have more connections with ASEAN. For example, Taiwan performs good at doing international business and banking, we can strategically choose MRA for Accountancy Services as a start point, try to establish our qualification framework system specifically in accountancy which can directly help both Taiwanese accountancy mobile in Southeast Asia and recruit international accountancy talents to Taiwan.

(4) The future perspective of student mobility between Taiwan and ASEAN

From the perspective of NSP, it seems that Taiwan's government and HEIs have already prepared to open to ASEAN countries than before. However, when we talk about internationalization or globalization, it is not a good idea for Taiwan to choose who should or should not be linked with. We need to realize that regionalization is a part of globalization, there

is no reason for Taiwan to refuse any possible connections with any other countries. NSP in education is definitely a crucial start for Taiwan to build firmer relationships with ASEAN countries, but we should always consider the related issues from a broader global view, instead of a narrow perspective. ASEAN countries all have their own unique niches and connections, if Taiwan can make good use of them, then the 'Southbound' could further become 'Globalbound'.

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