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MINISTRY OF EDUCATION AND TRAINING



Viet Nam: Towards a New International Education Hub in Southeast Asia

Lessons and Evidence

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Contents

Forewords	6
Assoc Prof Dr Pham Quang Hung, Director General, International Cooperation Department, Ministry of Education and Training	6
Donna McGowan, Country Director, British Council in Viet Nam	7
1. Background	8
1.1 The Evolving Landscape of International Education	8
1.2 Viet Nam's Place in the Global Education Landscape	8
1.3 Policy Evolution in Viet Nam: Towards International Education Hubs	8
1.4 Current Initiatives: Building the Foundation	9
2. Objectives and methodology	9
2.1 Desk research	9
2.2 Primary data collection	9
2.2.1 Surveys	9
2.2.2 Semi-structured interviews	9
2.3 Comparative analysis	9
3. The state of international student mobility in Viet Nam	10
3.1 Literature review and secondary data analysis on international student mobility between Viet Nam and other countries	10
3.2 Outbound and inbound international student mobility at the degree level	11
3.3 Growth in international education programmes	13
3.3.1 Joint training programmes	14
3.3.2 Online TNE	16
3.4 International student mobility and exchanges to Viet Nam: findings from primary data collection	16
3.4.1 Findings	16
3.4.2 Nationalities of international students	18
3.4.3 Motivation to attract international students	19
3.4.4 International faculty members	19
3.4.5 Strategies and policies to attract international students	20
3.4.6 The most impactful factors influencing international student outputs	21
3.5 The experience of international students in Viet Nam	22
4. Viet Nam as the next study destination in Southeast Asia: international student hub	26
4.1 Creating the right environment for globally mobile students at the national level	26
4.1.1 National policy frameworks for international higher education	26
4.1.2 Lessons from other global study destinations	26
4.2 Natural hot spots for international students	27
4.3 Attempts to create education hubs in Viet Nam	30
5. International Education Hubs and Viet Nam	33
5.1 Hub Profiles	33
5.1.1 Education City, Qatar	33
5.1.2 Dubai Free Trade Zones, United Arab Emirates	34

5.1.3 EduCity Iskandar, Malaysia	35
5.1.4 Ras al Khaimah Academic Zone, United Arab Emirates	36
5.1.5 Incheon Global Campus, South Korea	37
5.1.6 Uniciti International Education Hub, Mauritius	38
5.1.7 Hainan Li'an International Education Park, China	39
5.2 International education hubs	39
5.2.1 A Comparative Overview	39
6. Considerations for international engagement	43
6.1 Recommendations regarding the promotion of international student mobility	43
6.2 Considerations for HEIs	44
6.3 Recommendations for the Government, Ministry of Education and Training (MOET), and Central and Local Authorities	45
6.4 Education Hubs	46
6.5 Considerations for International Stakeholders	48
Reference	49
Appendix A: The number of Higher Education Institutions across Vietnamese Provinces and Cities	51
Appendix B: List of participants in in-depth interviews	52
Appendix B1: List of representatives from international education hubs who participated in in-depth interviews	52
Appendix B2: List of stakeholders involved in inbound student mobility and TNE provision in Viet Nam who participated in in-depth interviews	53
Appendix C: Net Flow of Internationally Mobile Students in Asia	54
Appendix C1: Net flow of international students in some Asian countries (2006-2021)	54
Appendix C2: Net flow of internationally mobile students in some East and Southeast Asian Countries (2010-2021)	55
Appendix D: Descriptive result of a survey with 123 HEIs in Viet Nam	55
Appendix D1: Profile of the surveyed 123 HEIs	55
Appendix D2: Number of long-term and short-term international students at 123 HEIs in Viet Nam, 2019-2024	56
Appendix D3: Vietnamese students studying abroad at 123 HEIs in Viet Nam, 2019-2024	56
Appendix D4: Top 10 nationalities of long-term international students at 123 HEIs in Viet Nam, 2019-2024	57
Appendix D5: Top 10 nationalities of short-term international students at 123 HEIs in Viet Nam, 2019-2024	57
Appendix D6: Motivations for attracting international students at 123 HEIs in Viet Nam, 2024	58
Appendix D7: International faculty at 123 HEIs in Viet Nam, 2019-2024	58
Appendix D8: Strategies and Policies for attracting international students at 123 HEIs in Viet Nam	58
Appendix D9: Results of regression analysis of the relationships between universities' internationalisation strategies and international student outputs	60
Appendix E: International Student Survey Responses	62
Appendix E1: Gender of 149 international students in Viet Nam	62
Appendix E2: Nationalities of 149 international students in Viet Nam	62
Appendix E3: Host HEIs in Viet Nam of 149 international students	63
Appendix E4: Major of 149 international students in Viet Nam	63
Appendix E5: Financial status of 149 international students in Viet Nam	63
Appendix E6: Language of instruction of 149 international students in Viet Nam	64
Appendix E7: Programme duration at host HEIs of 149 international students in Viet Nam	64
Appendix E8: Experience of 149 international students studying in Viet Nam	65
Appendix E9: Satisfaction level of 149 international students studying in Viet Nam	71
Appendix F: Positive relationship between urbanisation levels and wealth	72
Appendix G: List of existing hubs in Viet Nam (update in progress August 2024) - in order of establishment/ official decision	73
Appendix H: Policies, Investment Standards, and Support for International Educational Institutions	75

Forewords

Assoc Prof Dr Pham Quang Hung, Director General, International Cooperation Department, Ministry of Education and Training

It is with great pleasure that I present the report 'Viet Nam: Towards a New International Education Hub in Southeast Asia. Lessons and Evidence' a joint effort between the British Council and the Ministry of Education and Training. This report is a testament to our shared commitment to the internationalisation of education in Viet Nam and highlights the nation's progress in establishing itself as a key destination for global educational opportunities.

As the world becomes increasingly interconnected, the internationalisation of education has emerged as a crucial element in preparing students for the challenges and opportunities of a globalised future. In this context, Viet Nam is uniquely positioned. With a dynamic and youthful population, a rapidly growing economy, and a strong commitment from the government to enhance educational standards, Viet Nam has the potential to transform into a leading hub for international education in the region.

This report aims to highlight the key factors contributing to Viet Nam's emergence as an educational hub and to provide insights into the

opportunities and challenges that lie ahead. It explores how Viet Nam's focus on internationalisation is not only benefiting local students but also creating a more vibrant and diverse educational landscape that attracts students, educators, and institutions from around the world.

By fostering international partnerships, promoting student mobility, and enhancing the quality of higher education, Viet Nam is laying a strong foundation for sustainable development and global engagement. This report serves as a testament to Viet Nam's dedication to becoming a central player in the international education arena and its commitment to creating a globally competitive educational ecosystem.

I hope this report will serve as a valuable resource for educators, policymakers, investors, and all stakeholders interested in the internationalisation of education in Viet Nam. Let us continue to work together to support Viet Nam's journey towards becoming a leading destination for quality international education, contributing to the region's educational excellence and global influence.

Donna McGowan, Country Director, British Council in Viet Nam

I am delighted to introduce to you this report 'Viet Nam: Towards a New International Education Hub in South East Asia – Lessons and Evidence' as a result of joint efforts between the Ministry of Education and Training, Viet Nam and the British Council in Viet Nam. This report is part of our commitment to the Ministry of Education and Training Viet Nam on higher education development and internationalisation under our Memorandum of Collaboration.

The report reflects the growing vision of the Vietnamese government to position Viet Nam as an emerging hub for international education, one that enhances regional connectivity, knowledge exchange, and global partnerships.

The British Council has been privileged and committed to support Viet Nam's journey towards elevating its quality and impact of higher education. Through our combined efforts, we have seen the enormous dedication on the part of Viet Nam higher education stakeholders to build a more innovative and inclusive education landscape. We are committed to supporting Viet Nam's ambitions in enhancing the quality of its education system, fostering international

collaboration in teaching, learning, research and innovation and strengthening and deepening ties between the UK and Viet Nam in education.

This report has drawn on a wealth of data and insights from a joint UK Viet Nam research team. We hope this will be instrumental in shaping future strategic directions and partnerships that support students, educators and institutions. It provides lessons learned from other education hub models, data on student mobility and a road map for future growth, underscoring the transformative role of education in promoting sustainable development.

I would like to extend our gratitude to the Ministry, particularly to the International Cooperation Department and to all those who contributed to this research. Together we look forward to new heights of strengthened UK Viet Nam partnership in education that will drive innovation and excellence in higher education in Viet Nam, across South East Asia and beyond.

Enjoy reading.

1 Background

1.1 The Evolving Landscape of International Education

Over time, internationalisation in education has evolved significantly, with Knight (2014) identifying three distinct generations. The first generation centred on the mobility of students, faculty, and professionals across borders for study and research. The second generation involved the movement of educational programmes and providers (i.e. Transnational Education - TNE), such as through franchises, other partnership arrangements or establishing international branch campuses. The third generation, which represents a more recent development, is characterised by creating international education hubs. These hubs entail planned efforts at the national, city, or regional level to attract a diverse range of stakeholders, including students, faculty, researchers, workers, educational programmes, providers, and R&D companies, to a specific location to engage in learning, training, knowledge production, and innovation.

Complementing traditional forms of international education, the development of global education hubs has gained prominence. These hubs function as dynamic clusters of educational institutions, research centres, and supporting infrastructure, fostering an environment that attracts international students, faculty, and investment. Prominent examples of successful international education hubs include Education City in Qatar, Incheon Global Campus in Korea, EduCity Iskandar in Malaysia, and Dubai International Academic City in the UAE. These hubs exemplify the potential of concentrated educational ecosystems to drive innovation, collaboration, and economic growth.

The socio-economic benefits of developing such hubs extend beyond their immediate educational impact. By fostering a collaborative ecosystem that includes academic institutions, businesses, and research entities, these hubs can drive economic growth, attract international investment, and enhance local job creation (Knight, 2014). They often lead to the establishment of vibrant communities that support academic and professional development, cultural exchange, and regional innovation. These advantages make education hubs a powerful tool for boosting national competitiveness and fostering sustainable socio-economic development.

International student mobility is at the heart of the development of international education hubs. Within this broader context, international student mobility, meaning

students studying in a country different to their home country, remains a cornerstone of global education. In 2020, UNESCO reported a remarkable 6.4 million students pursuing education abroad, a 32% increase since 2015. The British Council's reports forecast a continued, albeit slower, growth rate of 4-4.5% annually until 2030, influenced by the economic and political turbulence following the COVID-19 pandemic. Numerous studies have identified international students enrich host countries and institutions by attracting skilled human resources, enhancing institutional rankings, and strengthening diplomatic ties (Reinold, 2018; QS, 2020; Sowter, 2008).

1.2 Viet Nam's Place in the Global Education Landscape

Viet Nam occupies a distinctive position in the global landscape of international education, characterised by a significant outflow and a growing inflow of students. As the world's third-largest sending country, Viet Nam saw over 137,000 students pursuing education overseas in 2021 (UNESCO Institute for Statistics - UIS). Simultaneously, Viet Nam hosted approximately 21,000 international students in the same year, seeking both degree and non-degree programmes (The Ministry of Education and Training of Viet Nam, 2024).

1.3 Policy Evolution in Viet Nam: Towards International Education Hubs

The concept of international integration in education has been consistently emphasised in Vietnamese policy documents and resolutions in recent years. This commitment is reflected in Resolution 14/2005/NQ-CP of the Government (2 November 2005) and Resolution 29-NQ/TW of the Central Party Committee (4 November 2013), highlighting the importance of educational innovation and internationalisation to support national development goals.

A significant milestone was reached with Resolution No. 50/NQ-CP of the Government (20 May 2021), which explicitly articulated the goal of establishing international education zones in Viet Nam. This marked the first instance where the development of such zones was formally incorporated into the national education strategy, aligning Viet Nam with the global trend towards the third generation of education internationalisation identified by Knight (2014). The vision underpinning the 2021 Resolution is to create integrated hubs that combine education, training, research, science, and technology transfer to foster intellectual and creative output.

The Prime Minister's Resolution No. 138/NQ-CP of the Government (25 October 2022) on the National Master Plan (for 2021-2030, with a vision to 2050) further emphasised the development of higher education zones as a key component of social infrastructure development.

In addition to the focus on international education zones, Viet Nam recognises the importance of leveraging the existing strengths of its global education landscape. Despite the prominence of outbound student mobility, comprehensive data collection and research in this area remain underdeveloped in Viet Nam. Recognising the potential of inbound student mobility to enhance the national business environment and competitiveness, the Ministry of Education and Training (MOET) has prioritised increasing the number of international students coming to Viet Nam as a key strategic objective in 2024 (Decision No. 348/QĐ-BGDĐT dated 19 January 2024). This focus underscores the government's commitment to harnessing the benefits of both inbound and outbound student mobility to drive the internationalisation of education in Viet Nam.

1.4 Current Initiatives: Building the Foundation

In alignment with these strategic objectives, the Ministry of Education and Training has initiated Plan No. 444/KH-BGDĐT (3 May 2024) and Plan No. 249/KH-GDDT (13 March 2024) to research international education policies and best practices. This research will inform the development of a project to enhance Viet Nam's competitiveness in attracting foreign educational institutions and fostering student mobility.

In partnership with the British Council in Viet Nam, MOET is actively exploring the potential of positioning Viet Nam as the next prominent international study destination in Southeast Asia. This endeavour involves a multifaceted approach encompassing policy reforms, infrastructure development, and cultivating a conducive environment for international education collaboration.

2 Objectives and methodology

The research analyses Viet Nam's readiness to be the next international study destination in Southeast Asia. To achieve this, the study undertook two key sets of activities:

- This paper reviews the current situation of international student mobility flows, focusing on mobility and exchange between Vietnamese universities and their global partners. It also analyses national strategies, policies, and statistics at the governmental and institutional levels.
- A comparative study on education hubs and reflections on the Viet Nam context, including a review of different global education hub models, aimed at identifying opportunities and challenges in attracting foreign investment from education institutions and organisations.

These activities involved both desk-based research and quantitative and qualitative data collection and also included a comparative analysis of different international education hubs.

2.1 Desk research

This research phase consisted of the following:

- A literature review of international student mobility focuses on types of mobility, the number of students involved in inbound and outbound mobility, and relevant government-supporting policies and institutional strategies.

- A literature review of different models of international education hubs in the world focusing on nature, mode of governance, mode of operation and impact on the social and economic landscape of the host country.

2.2 Primary data collection

2.2.1 Surveys

Two online surveys were conducted in Viet Nam with international students and university professionals responsible for internationalisation. The student surveys included short-term mobility and degree-level students.

2.2.2 Semi-structured interviews

Semi-structured interviews were carried out with stakeholders involved in setting up, participating in, and having direct experience with international education hubs and a range of local education hubs set up across Viet Nam.

Interviews also included Vietnamese universities experienced in TNE and recruiting international students.

2.3 Comparative analysis

Case studies dedicated to international education hubs worldwide were produced to inform a comparative analysis of different models adopted. The studies showed shared features and features specific to each model.

Table 1 summarises the data collection for this project.

Table 1: Primary data collection

Type of data collection	Data collection method	Number of responses/in	
		Female respondents	Male respondents
Quantitative data collection	Online survey with international students in Viet Nam	62	86
	Online survey with higher education institutions in Vietnam	123	
Qualitative data collection - semi-structured interviews	Representatives from international hubs	2	6
	Representatives from international TNE providers	1	2
	HE stakeholders and professionals	6	7
Case studies	Case studies from a selection of international student hubs globally	7	

3 The state of international student mobility in Viet Nam

Viet Nam was the third largest sending country of globally mobile students at the time of the study (UIS, 2024)¹. Over the past decades, the number of outbound Vietnamese students gradually increased, which resulted in a net loss of young talent, considering the low number of international students choosing to study in Viet Nam. However, this balance deficit in cross-border student mobility can be addressed with policy reforms to make the Viet Nam higher education sector more attractive to Vietnamese and international students.

3.1 Literature review and secondary data analysis on international student mobility between Viet Nam and other countries

Traditionally, Viet Nam is regarded as a source country for international students rather than a study destination country. On average, the number of Vietnamese students crossing the border to undertake overseas education over the past decade has been about 130,000 at any given time. In the opposite direction, very few documents have been found to report the exact number of international students in Viet Nam. The Vietnamese government does not appear to have set a target on inbound student mobility.

The student flows to Viet Nam stem from bilateral partnerships, initiatives, international government programmes (e.g. Australia's New Colombo Plan, UK's Turing programme, Erasmus, ASEAN) and self-sponsored students. Based on known bilateral partnership schemes, it is possible to estimate that Vietnam annually hosts nearly 2,000 international students from partner countries, primarily developing and emerging ones.

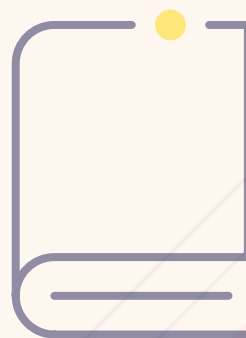


Table 2: Bilateral agreements between Viet Nam and other countries on international student exchanges

International student mobility country-level agreement (updated until March, 2024)			
No	Partnered country	Partnership Updated	Yearly intake quota of international students to Vietnam
1	Armenia	2019	5
2	Belarus	2011	20
3	Bulgari	2019	8
4	Cambodia	2021	120
5	China	2022	30
6	Cuba	2019	15
7	Hungary	2019	11
8	Kazakhstan	2011	3
9	Laos	2023	400-600
10	Moldova	2009	15
11	Mongolia	2016	15
12	Morocco	2018	10
13	Mozambique	2014	10
14	Myanmar	2017	20
15	Palestine	2010	5
16	Poland	2017	20
17	Romania	2016	20
18	Russia	2024	75
19	Sri Lanka	2016	5
20	Ukraine	2011	40

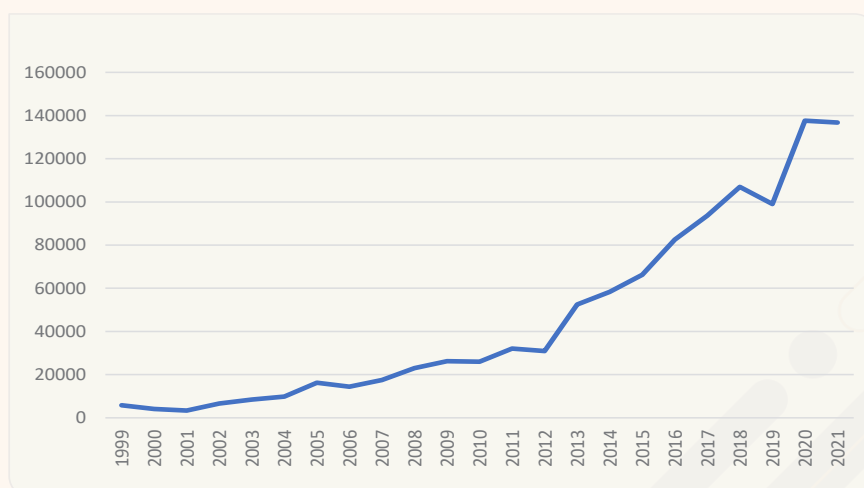
Source: Ministry of Education and Training.

3.2 Outbound and inbound international student mobility at the degree level

Until 2022, Viet Nam was the world's third largest sending country of international students. Over the past two

decades, since the start of the UIS data, the number of globally mobile students from Viet Nam has continuously increased to 137,000 in 2021².

Figure 1: Globally mobile students from Viet Nam, 1999 - 2021



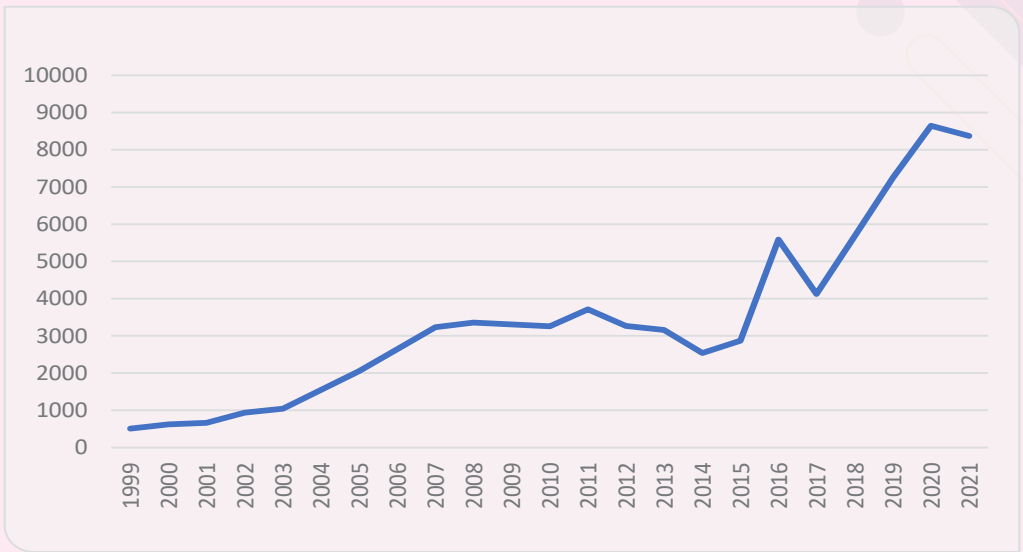
Source: Data extracted from UIS on 30 July 2024 at 22:16 UTC (GMT).Stat

² Preliminary data from UIS shows that in 2022, Viet Nam dropped to 4th place in outbound students after China, India and Uzbekistan. The data in this paper is from 2021.

Other East Asian nations, such as South Korea and Japan, were the largest host countries for Vietnamese students in

2021. These two countries hosted half of the degree-level students from Viet Nam.

Figure 2: International students in Viet Nam



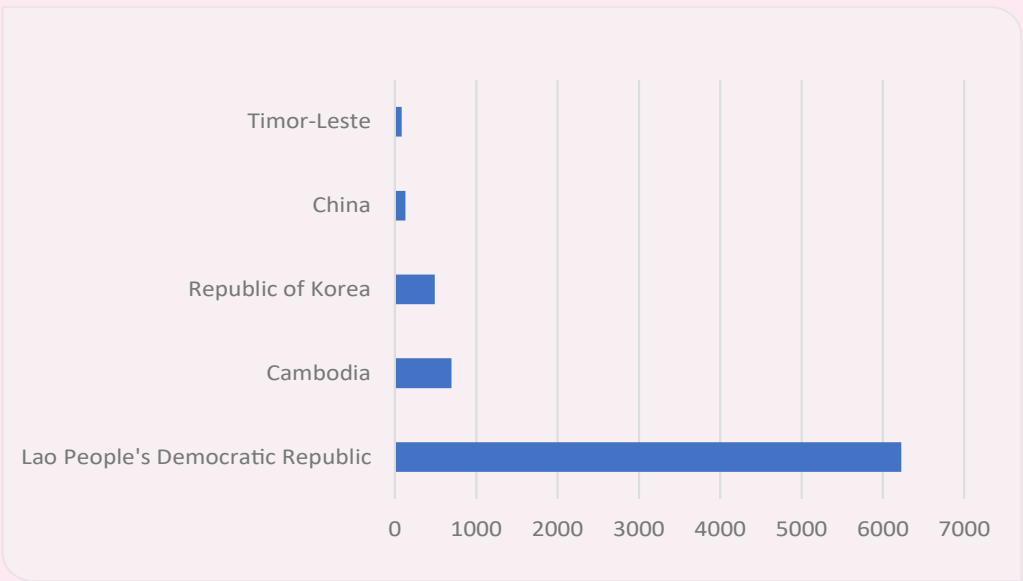
Source: Data extracted from UIS on 30 July 2024 at 22:16 UTC (GMT).Stat

While the number of internationally mobile students in Viet Nam has gradually increased over the past year and reached 8,200, it is still significantly below the number of Vietnamese students abroad.

Most international mobility to Viet Nam at the degree level is from its neighbouring geographical region, with students

from Laos accounting for the most substantial share of international students at 74 per cent of the total figure. This data demonstrates that a narrow range of countries send their students to Vietnam for higher education, with most incoming international students originating from the immediate vicinity.

Figure 3: Main countries of origin for international students in Viet Nam

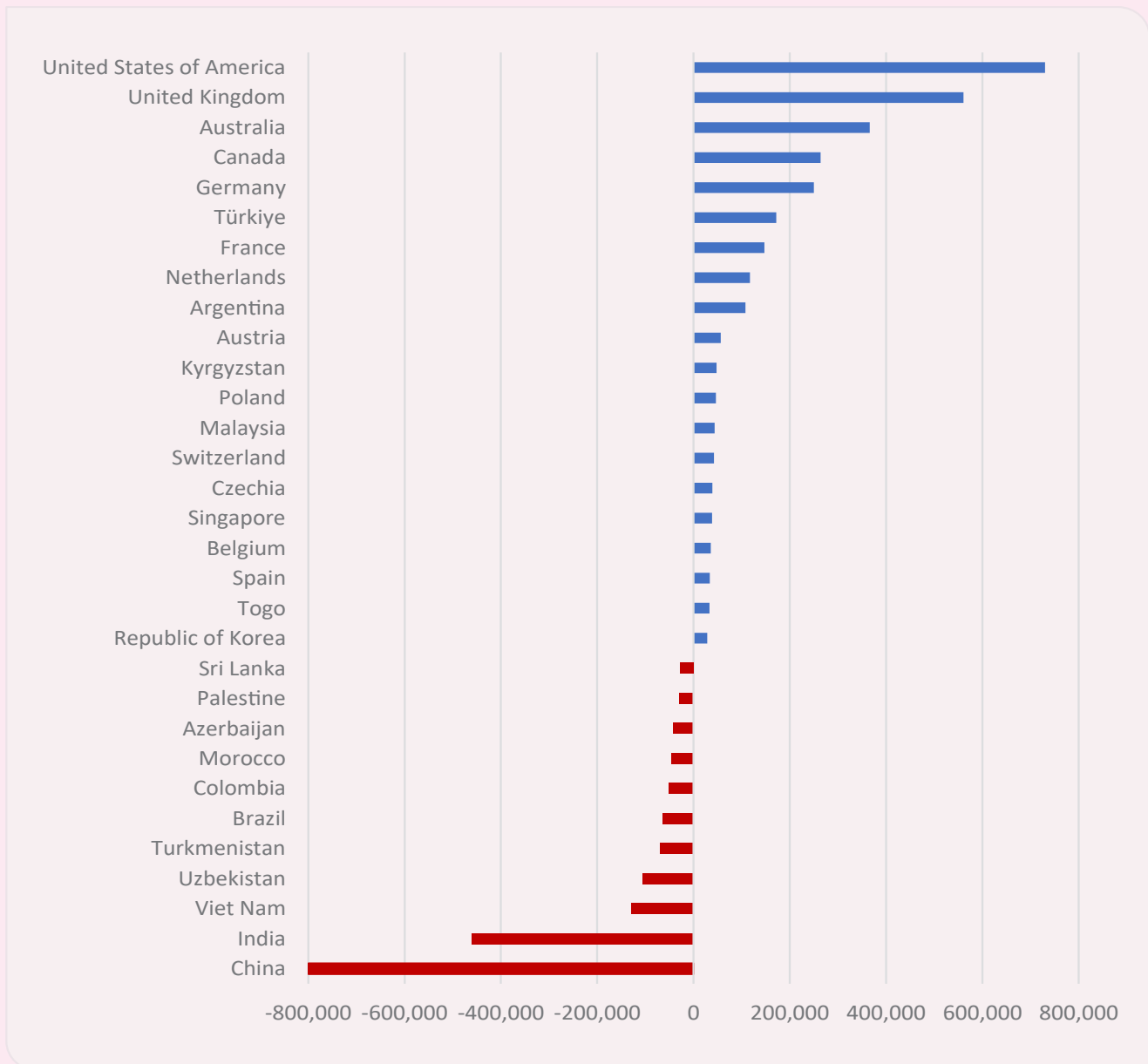


Source: Data extracted from UIS on 30 July 2024 at 22:16 UTC (GMT).Stat

The chart below shows the country's imbalance between inbound and outbound students. After China and India, Viet

Nam has the world's largest negative balance in terms of student mobility.

Figure 4: Net flows of internationally mobile students 2021



Source: Data extracted on 30 July 2024 22:16 UTC (GMT) from UIS.Stat

In this context, setting up the country as an international student hub offers an opportunity to address the persistent imbalance in student mobility by helping to retain Vietnamese students and attract a broader range of international students.

Viet Nam is already popular with students from within its immediate region. However, the country needs to attempt to achieve a balanced diversification of inbound international students. This area will be further discussed in the hubs section of this research. Incentives to international students, universities, and teaching faculty can contribute to a balanced international education outlook.

The analysis of inbound and outbound international students across East and Southeast Asian countries between 2010 and 2021 shows that over the past decade, several locations have become hubs for international students and, as a result, host more inbound than

outbound students (e.g., Hong Kong, Malaysia, Korea, Singapore). However, others (e.g., Indonesia, Viet Nam, Thailand, and China) still have a net negative flow, meaning they send more students abroad than they receive (See Appendix C1 and Appendix C2 for detailed comparisons).

3.3 Growth in international education programmes

Globally, the growth in TNE has contributed to the internationalisation of domestic HE. Notable examples in the region include Malaysia, Singapore and Hong Kong.

Using English as a medium of instruction (EMI) or other foreign languages has been regarded as one of the essential internationalisation strategies adopted by Viet Nam's government and higher education institutions (HEIs). Currently, EMI programmes in Viet Nam can be divided into two types: EMI programmes delivered through a TNE mode and EMI programmes delivered by

Vietnamese universities with domestic degrees.

The former (EMI programmes delivered through a TNE mode) was initiated by the establishment of CFVG (French Vietnamese Centre of Management) in 1992 and AIT (Asian Institute of Technology) Viet Nam in 1993. EMI programmes in Viet Nam may be operated under the auspices of a partnership between a Vietnamese university and an overseas partner university or as part of an international branch campus/international university such as RMIT Viet Nam, British University Viet Nam (BUV), Tokyo Human Health Sciences University Viet Nam, and Fulbright University. Additionally, EMI programmes can be found at some public universities with government-level partnerships from foreign countries, such as Viet Nam-German University, the University of Science and Technology Hanoi (Viet Nam-France University), and Viet Nam-Japan University.

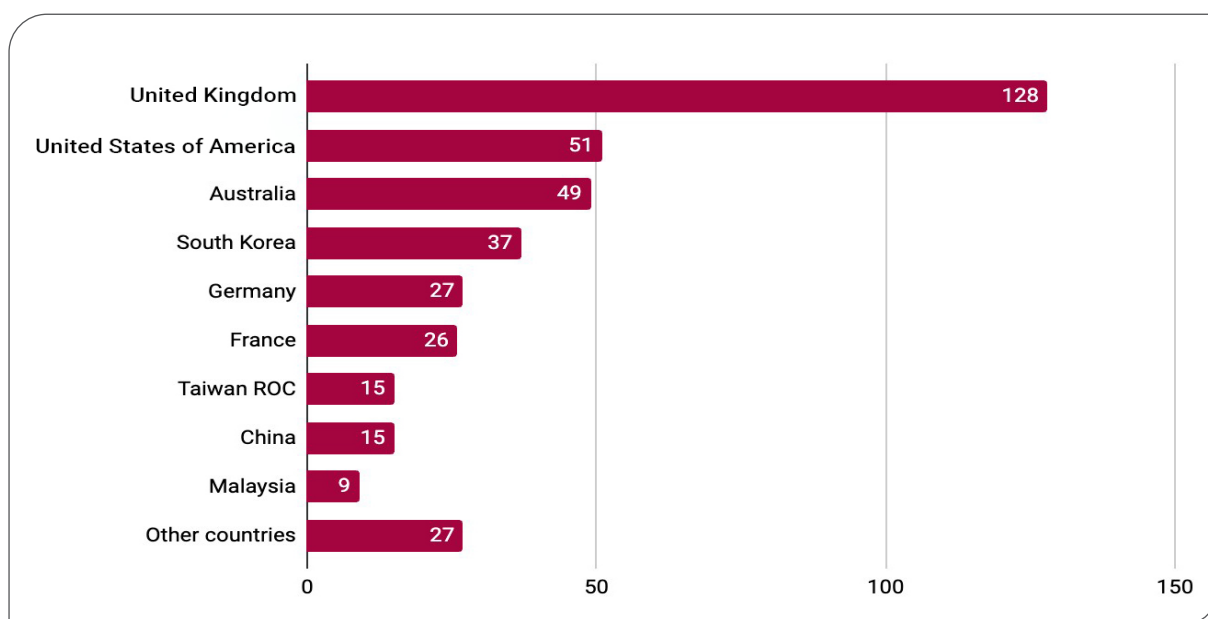
3.3.1 Joint training programmes

Joint training programmes (JTPs) with foreign partners have increasingly become an integral part of Viet Nam's

higher education landscape, implemented under the guidelines of Decree No. 86/2018/ND-CP, which governs foreign cooperation and investment in education. These programmes have played a vital role in training a skilled and high-quality workforce, helping meet the socio-economic development needs of the country in its current period of development.

Introducing new training programmes, mainly through JTPs with foreign institutions, has provided Vietnamese universities with a range of benefits. These programmes allow institutions to expand their training capacity and help improve infrastructure, develop human resources, increase revenue, and gain access to modern educational technologies. Additionally, JTPs create more student opportunities, reducing training costs and enhancing academic exchanges. Through these collaborations, Vietnamese HEIs can learn from the teaching and management models of globally prestigious universities, raising the quality of education as institutions compete to attract students.

Figure 5: Number of joint training programmes (JTPs) with foreign partners by country/territory



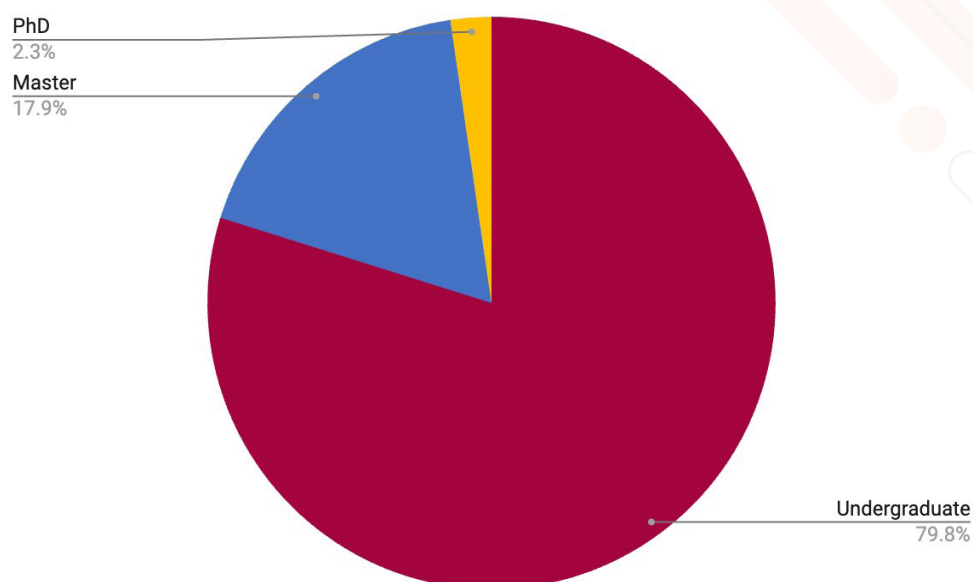
Source: HEMIS

As of the most recent data available in June 2024 from the Higher Education Management Information System (HEMIS), there were 431 Joint Training Programmes (JTPs) with foreign partners across Vietnam. Fifty Vietnamese higher education institutions (HEIs) collaborated with over 120 foreign institutions from 23 countries and territories.

The United Kingdom leads with 128 programmes, followed by the United States (51), Australia (49), South Korea (37), Taiwan and China (18 each), and Malaysia (9). Additional JTPs are being offered in collaboration with institutions from countries such as Belgium, New Zealand, the Netherlands, and the Czech Republic, demonstrating the diversity of international partnerships.

Viet Nam's introduction to joint training programmes began in 1992 with the establishment of the French-Vietnamese Centre of Management (CFVG), a collaboration between the French Ministry of Foreign Affairs and the Vietnamese Ministry of Education and Training. This initiative was followed by creating the AIT Centre in Viet Nam in 1993, where the Asian Institute of Technology (AIT) started offering graduate programmes. The development of JTPs gained momentum in the 1990s and saw a significant increase in the 2000s, with over 500 approved programmes at its peak. An early franchised TNE collaboration occurred in 2003 between Hanoi University and La Trobe University, which delivered a Bachelor of Business programme with degrees awarded by La Trobe University.

Figure 6: Number of joint training programmes by educational level

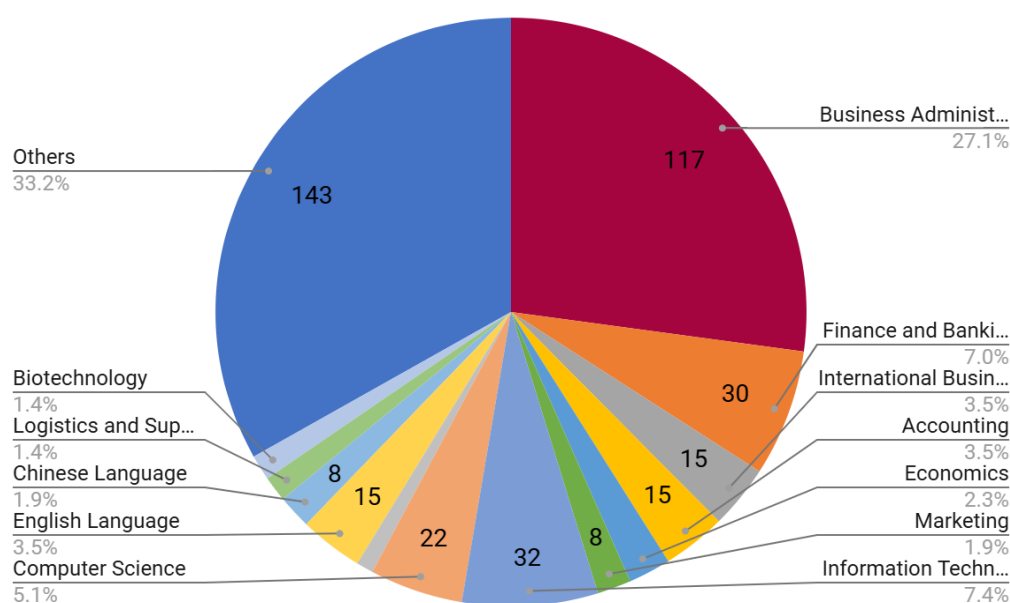


Source: HEMIS

Most JTPs in Viet Nam are at the undergraduate level, with 344 programmes (79.8 per cent of the total). Master's level programmes account for 77 (18 per cent), while

doctoral programmes remain scarce, with just 10 (2.2 per cent).

Figure 7: Proportion of joint training programmes by field of study



Source: HEMIS

The business-related sector dominates in academic disciplines, representing 45% of all JTPs. Business Administration alone accounts for 117 programmes (27 per cent), reflecting the demand for management and leadership skills in an increasingly globalised economy. The Finance and Banking sector has 30 programmes (7 per cent), while International Business and Accounting has 15 each. Other key fields include Economics (10 programmes) and Marketing (8 programmes).

In addition to business-related disciplines, the technology sector is well-represented, making up 13.5 per cent of all JTPs. Information Technology leads with 32 programmes (7.4 per cent), followed by Computer Science (22 programmes) and Electronics-Telecommunications (4 programmes). Language studies, mainly English and Chinese, account for 5.3 per cent of programmes, with 15 in English and 8 in Chinese. Other fields, such as Biotechnology, Graphic Design, and Logistics and Supply

Chain Management, each with six programmes, reflect the growing demand for specialised skills and practical training. A further 143 programmes cover a wide range of other disciplines, offering students diverse educational opportunities.

Regarding qualifications, most JTPs confer degrees awarded by the foreign partner institutions, with a smaller number offering dual degrees from both the Vietnamese and foreign partner institutions.

3.3.2 Online TNE

Online TNE has gained increasing attention from higher education practitioners in recent years, and Viet Nam is no exception to this trend. During the two years of the COVID-19 pandemic (2020-2021), the Vietnamese and Australian governments considered piloting some fully online cross-border programmes with the involvement of Monash University, Deakin University, Swinburne University of Technology, Griffith University, and the University of Southern Queensland (Sharma, 2021). However, the project was subsequently suspended as the Vietnamese government decided not to permit 100 per cent online TNE programmes. Existing regulation allows a maximum of 30 per cent of the total TNE course for online mode (Circular 08/2021/TT-BGDĐT); the remaining 70 per cent must be delivered offline.

3.4 International student mobility and exchanges to Viet Nam: findings from primary data collection

This section focuses on degree and non-degree mobility to and from Viet Nam over the past two decades. The UNESCO Institute for Statistics (UIS) records detailed data on degree students. Limited data on credit and other short-term mobility are mainly collected at the country

level. To fill this data gap, a survey was conducted as part of this study, and all Vietnamese universities were approached to participate. Degree and short-term mobility data were collected and analysed in this study.

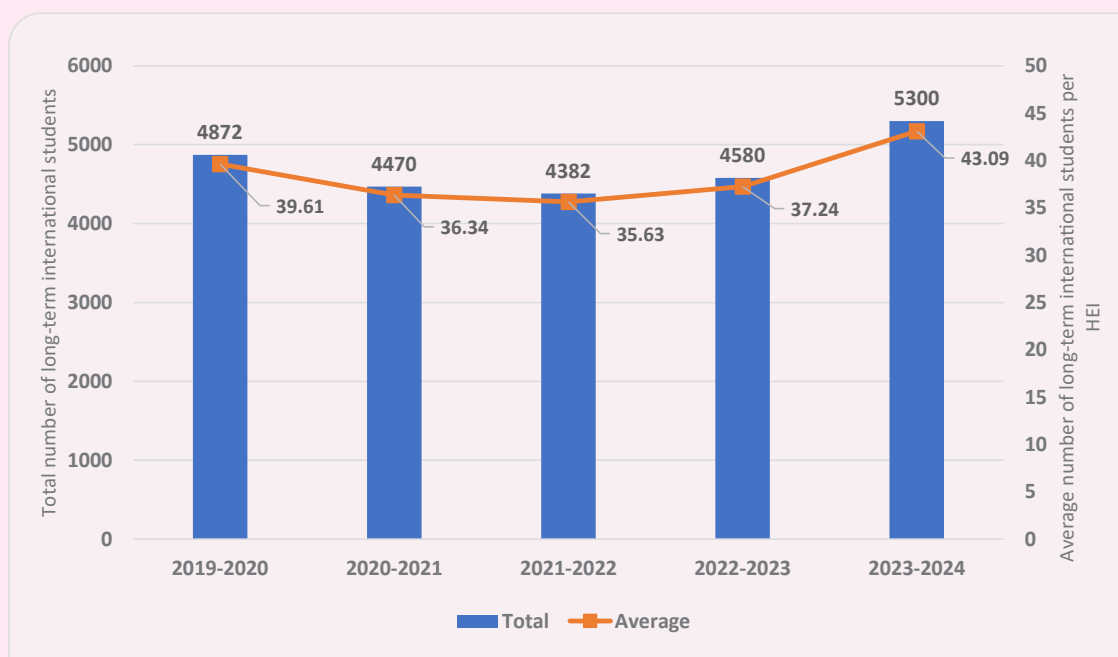
The survey also included an official letter to all HEIs in Viet Nam, asking them to participate. The survey asked HEI representatives to report on the status of international student mobility at their universities over the past five years. The data collection began in June 2024 and concluded in August 2024. Ultimately, 123 out of 240 HEIs responded to our survey, resulting in a response rate of 51.25 per cent. A detailed profile of the 123 responding HEIs is presented in Appendix D1.

3.4.1 Findings

It is evident that all trends in international student mobility—whether long-term or short-term, inbound or outbound—experienced a slight decline during the two years of the COVID-19 pandemic (2020-2021 and 2021-2022) and began to recover in the 2022-2023 academic year. In the most recent year (2023-2024), all figures (long-term and short-term inbound international students, and outbound international students) are slightly higher than those recorded in 2019-2020, the year before the COVID-19 pandemic.

However, our in-depth interviews with leaders of HEIs in Viet Nam reveal that these numbers are higher than the officially reported numbers. This could be explained by the misalignment of information between the department responsible for answering the survey and the department responsible for international student mobility. It also sheds light on the lack of a systematic and efficient mechanism for managing and reporting data on international students at some HEIs in Viet Nam.

Figure 8: Long-term international students at 123 HEIs in Viet Nam, 2019-2024

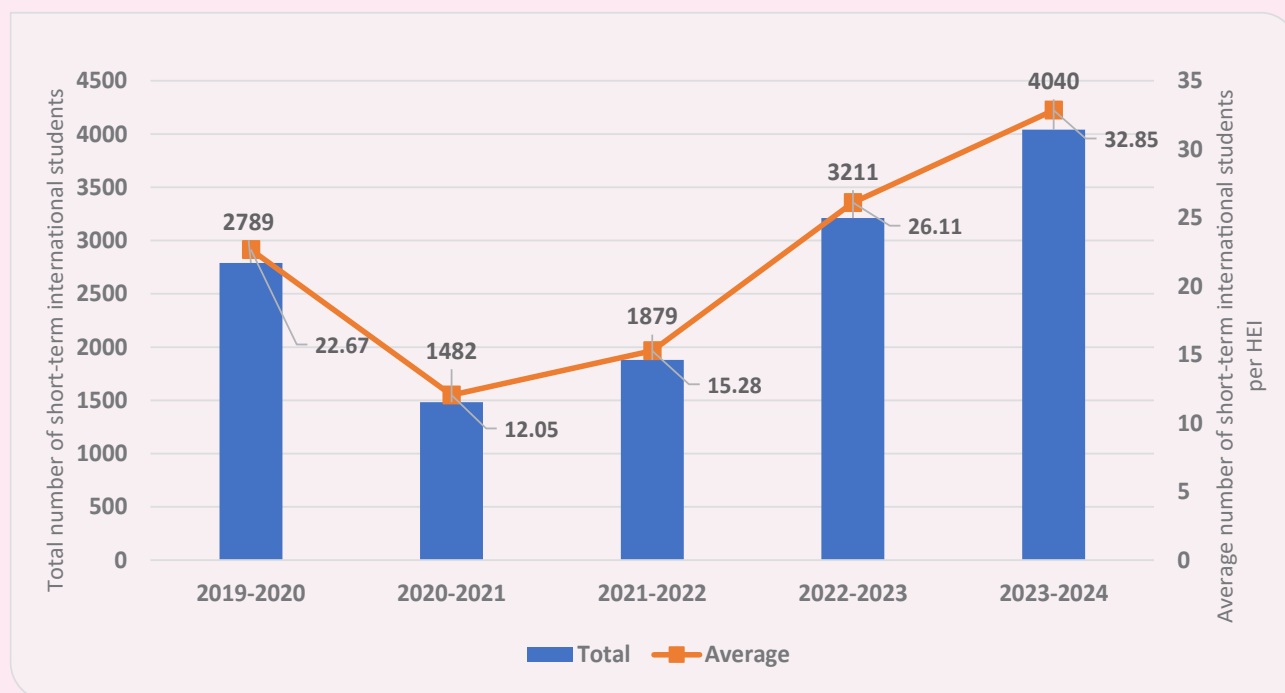


Source: Survey with Vietnamese higher education institutions

Both groups can observe post-pandemic growth when comparing long-term and short-term inbound international

students. However, the growth was most evident in the short-term mobility of students.

Figure 9: Short-term international students at 123 HEIs in Viet Nam, 2019-2024

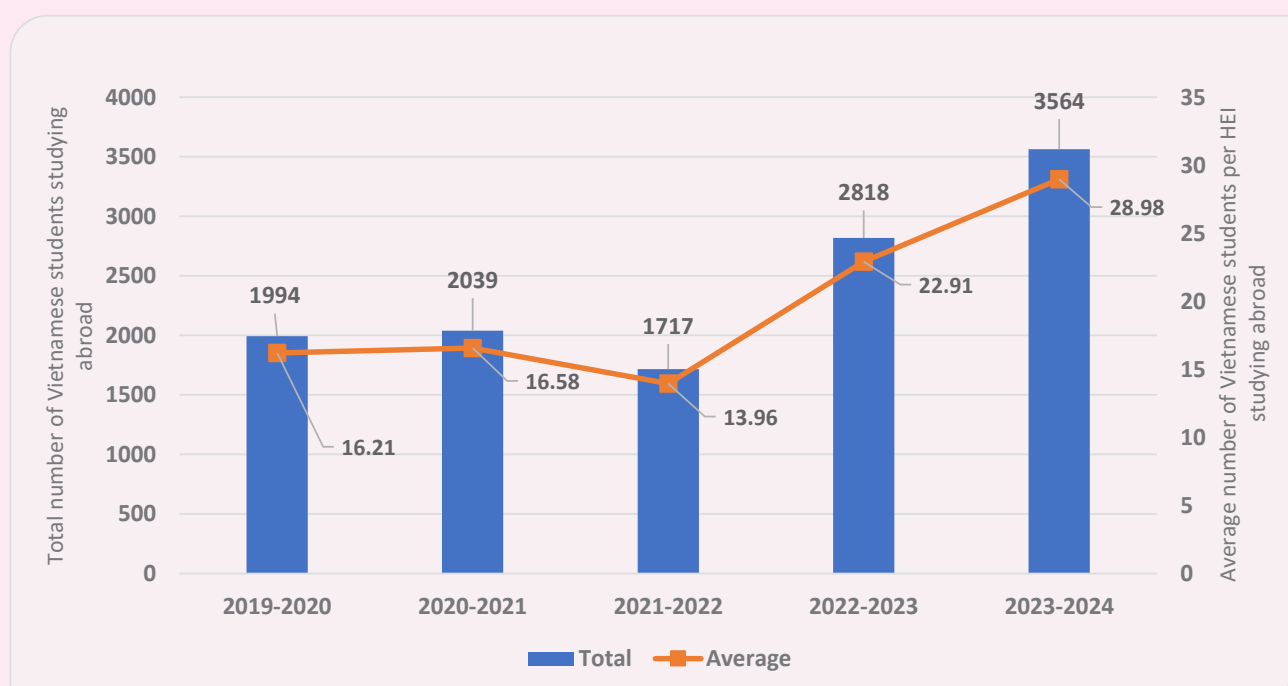


Source: Survey with Vietnamese higher education institutions

When we compare inbound short-term international students and Vietnamese students studying abroad through the arrangements of Vietnamese HEIs and foreign partners, we can observe a balance between these two groups. Interestingly, the number of inbound short-term international students has been slightly lower than that of long-term international students over the past five years.

The number of Vietnamese students studying short-term abroad has grown significantly, albeit from a low base. This suggests that Vietnamese HEIs have begun considering outbound short-term students as part of their internationalisation strategies, a shift that might not have been evident a decade ago.

Figure 10: Study abroad students at 123 Vietnamese HEIs, 2019-2024



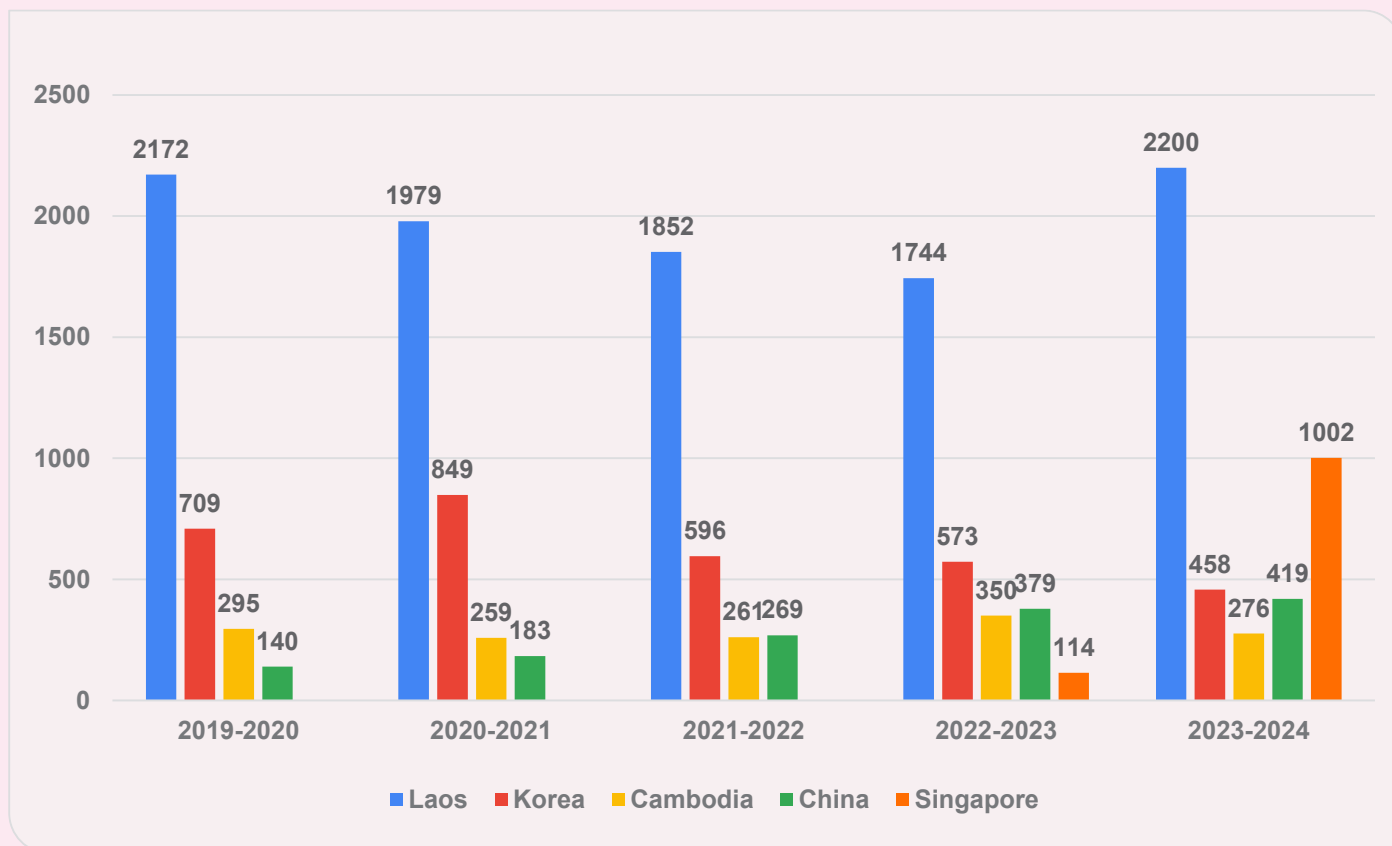
Source: Survey with Vietnamese higher education institutions

3.4.2 Nationalities of international students

Long-term international students in Viet Nam came from 40 countries between 2019 and 2024, with the most significant sources being neighbouring countries such as Laos, Korea, Singapore, Cambodia, and China. Of the 7,281 international students in Viet Nam between 2019 and 2024, 79 per cent originated from Asian countries.

Laotian students contribute the most significant share with approximately 2,000 students yearly, or 42.47 per cent of the international students. However, unlike most other international students who come to study in English-medium instruction (EMI) programmes, students from Laos often can use Vietnamese and study alongside domestic students in Vietnamese-medium instruction programmes.

Figure 11: Nationalities of long-term international students at 123 HEIs in Viet Nam, 2019-2024



Source: Survey with Vietnamese higher education institutions

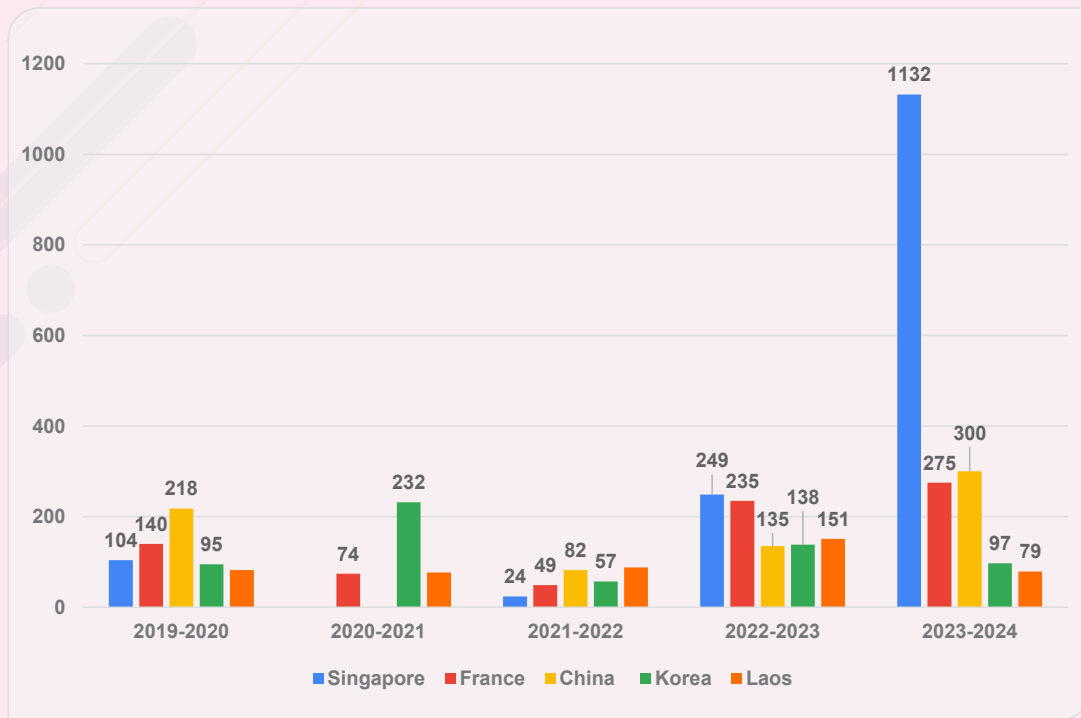
Countries from other continents also send students to Viet Nam, although in limited numbers over the years. Ranked 7th and 9th, France and the UK are the most significant non-Asian sending countries.

On the other hand, although most short-term international students in Viet Nam still come from Asian countries (968 out of 1,456³ on an annual average, accounting for 66.49 per cent), the nationalities of these students are more varied than long-term ones. By annual average, Singapore leads with 303 students studying in Viet Nam short-term, followed by France (155), China (147), and Korea (124). Bilateral institutional agreements between Vietnamese HEIs and international HEIs have been the driving factor in fostering short-term international student mobility to Viet Nam. For example, the bilateral agreement between International University - VNU-HCM and Singapore National University has attracted 125 Singaporean students to Viet Nam since 2021. In addition, International University - VNU-

HCM established bilateral agreements with many other international universities, such as Reutlingen University (Germany), HAN University of Applied Science (The Netherlands), and Normandie Business School (France), bringing many international students to Viet Nam. Many short-term international students are enrolled in EMI programmes, which appear to contribute to the country's geographical diversity of international students.



Figure 12: Nationalities of short-term international students at 123 HEIs in Viet Nam, 2019-2024



Source: Survey with Vietnamese higher education institutions

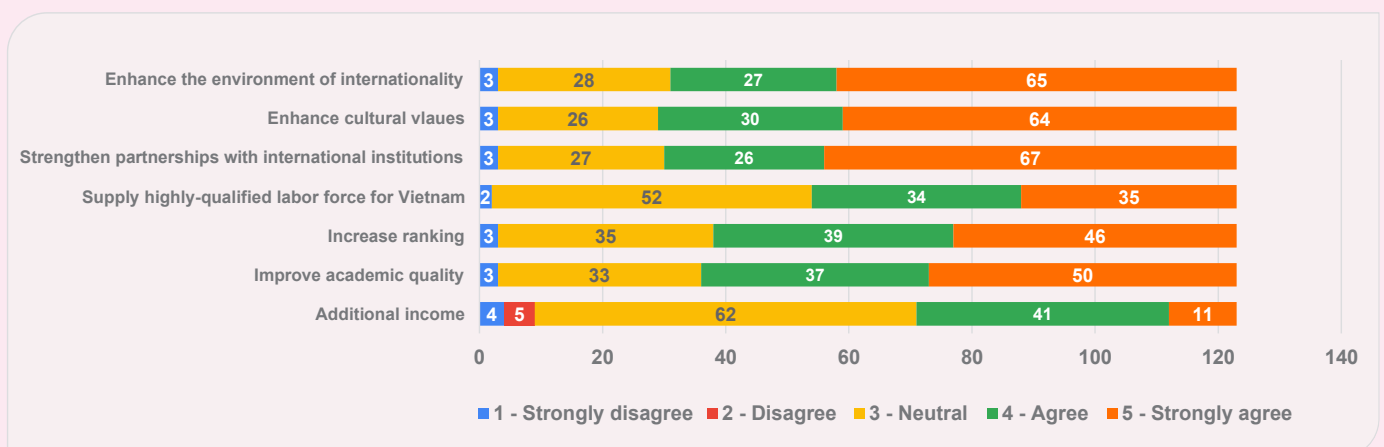
Students' cultural experiences forge deep relationships and connections with the host country. Research by QS with international graduates from the UK shows that 57 per cent of the student respondents are more likely to do business with the UK because of their degrees (QS & Universities UK International, 2024). To support such connections, a better understanding of Vietnamese culture and historical heritage is required. This is particularly relevant because most international students return to their home countries. Subjects that contribute to strengthening intercultural understanding and connections may include subjects

like the Vietnamese language and history. Subjects that are compulsory for Vietnamese students related to ideology may be less relevant for international students and have a limited impact on strengthening people-to-people relations.

3.4.3 Motivation to attract international students

Figure 13 shows that environmental motivations are the most critical factor for Vietnamese HEIs in recruiting international students. Economic-related motivations are the least important, with academic-related motivations in the middle of the spectrum.

Figure 13: Motivations of 123 HEIs in Viet Nam to attract international students, 2024



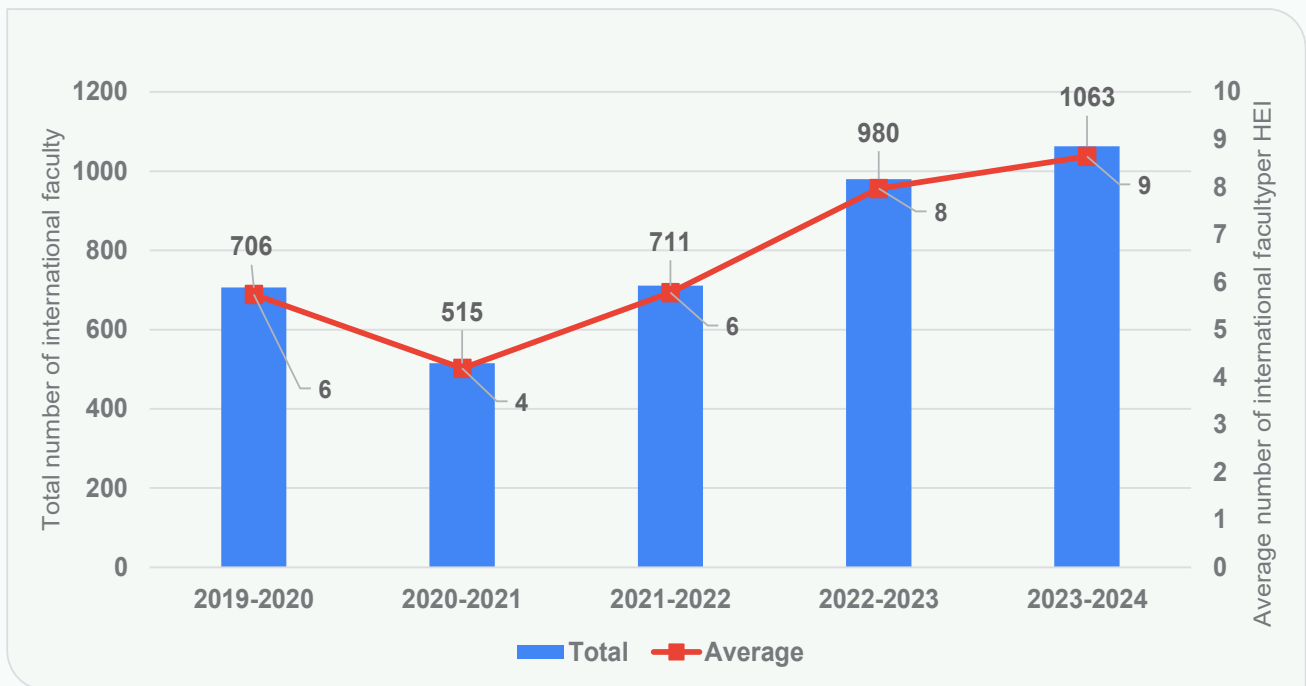
Source: Survey with Vietnamese higher education institutions

3.4.4 International faculty members

Traditionally, Vietnamese universities only recruit domestic faculty members. Along with the internationalisation of higher education and to attract international students, many universities have started to set objectives to recruit international faculty members. Figure 14 shows the number of international

faculty members at 123 surveyed universities between 2019-2024. International faculty members are estimated to be a small number of the total faculty. On average, each surveyed university has fewer than ten international faculty members per year.

Figure 14: International faculty at 123 HEIs in Viet Nam, 2019-2024



Source: Survey with Vietnamese higher education institutions

3.4.5 Strategies and policies to attract international students

Figure 15 summarises the strategies for attracting international students from the 123 institutions surveyed. Most institutions have a dedicated administrative unit overseeing international students and have student recruitment goals. A significant number of institutions offer scholarships to international students.

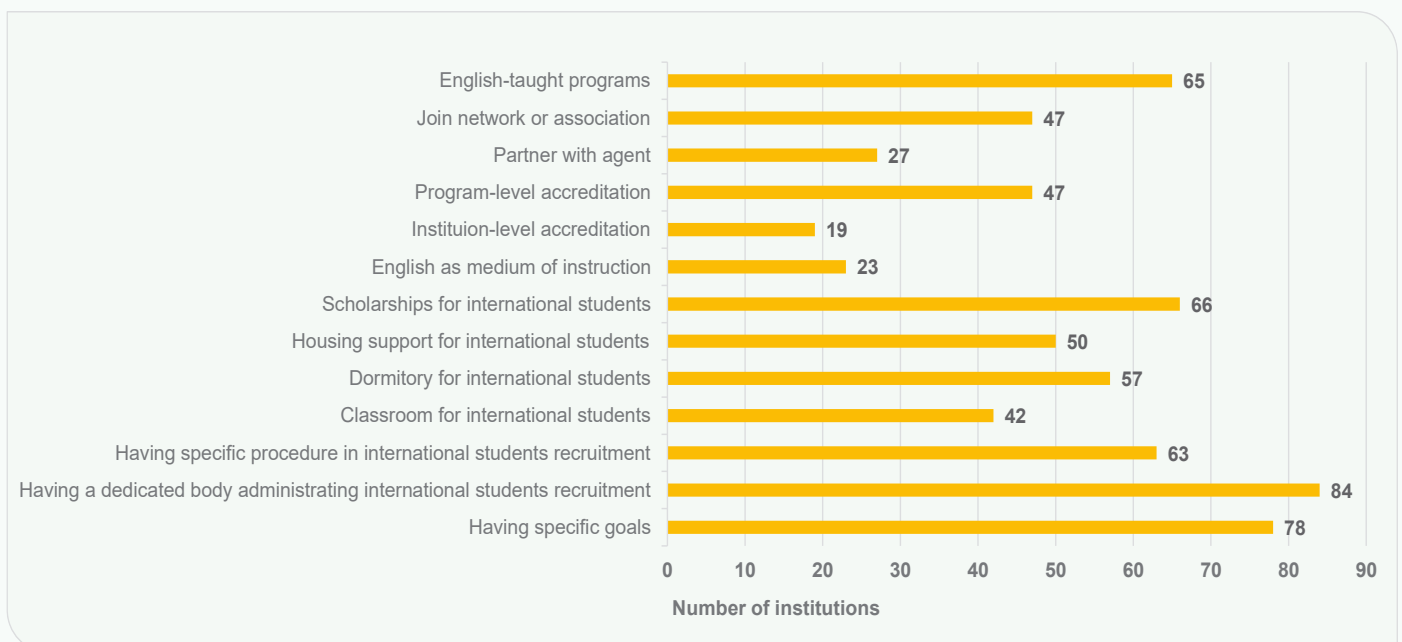
Table 3 shows the data of the top-performing institutions for international student recruitment. The data include the number of long-term inbound, short-term inbound, and

short-term outbound Vietnamese students. Additional information was collected on the number of international faculty members.

Among the top-performing HEIs, four are public (Hanoi University, Foreign Trade University, Ton Duc Thang University, and Hanoi University of Science and Technology), one is private (Van Lang University), and one is international (RMIT University Viet Nam). Only RMIT University Viet Nam demonstrates strong performance across all areas.

The detailed data is available in Appendix D.

Figure 15: Strategies used by 123 HEIs in Viet Nam to attract international students, 2024



Source: Survey with Vietnamese higher education institutions

Table 3: Case studies of high-performing Vietnamese HEIs in recruiting international students

Institution's Name		International faculty					Long-term international students					Short-term international students					Vietnamese students studying abroad				
		2019-20	2020-21	2021-22	2022-23	2023-24	2019-20	2020-21	2021-22	2022-23	2023-24	2019-20	2020-21	2021-22	2022-23	2023-24	2019-20	2020-21	2021-22	2022-23	2023-24
Public HEI	Hanoi University	42	10	4	48	38	292	339	411	451	426	11	12	3	0	6	157	44	22	163	188
	Foreign Trade University	0	8	94	84	0	16	6	15	19	6	180	20	23	69	72	201	9	68	238	224
	Ton Duc Thang University	0	0	15	31	44	66	38	49	52	63	700	357	589	537	665	46	1.461	1.102	969	558
	HaNoi University of science and technology	18	12	12	10	18	31	58	75	97	131	181	153	488	570	582	65	6	126	150	237
Private HEI	Van Lang University	20	32	32	34	58	13	24	36	59	69	0	321	191	871	991	10	0	13	95	66
International HEI	RMIT University Vietnam	95	125	147	158	177	439	466	467	475	457	254	74	29	72	127	620	358	0	221	750

3.4.6 The most impactful factors influencing international student outputs

To address this research question, we employed four regression models (Poisson regression, Zero-Inflated Poisson regression, Negative Binomial regression, and Zero-Inflated Negative Binomial regression) to examine the impact of university strategies and policies on the outputs of international students (both long-term and short-term). Table 4 summarises the key results. Detailed findings are presented in Appendix D9.

Among the factors analysed, four significantly impact the output of long-term international students, while five significantly affect short-term international students. The four factors influencing long-term international student output are:

- Having specific dormitories for international students (ranked 1st),
- Setting a goal for international student enrolment (ranked 2nd)

- Number of EMI programmes (ranked 3rd)
- Number of international faculty members (ranked 4th).

The five factors significantly impacting short-term international student output are:

- Having specific procedures/regulations for international student recruitment (ranked 1st)
- International institutional-level accreditation (ranked 2nd)
- Setting goals for international students (ranked 3rd)
- Number of EMI programmes (ranked 4th)
- Number of international faculty members (ranked 5th).

Table 4: Strategies and policies influencing international student outputs

Strategy/Policy adopted by university	Long term International student		Long term International student	
	Level of significance	Rank	Level of significance	Rank
Having a specific goal on international students	Significant	2	Significant	3
Having specific unit/department on international student recruitment	Insignificant	/	Insignificant	/
Having specific procedure/regulation on international student recruitment	Insignificant	/	Significant	1
Number of partner agencies on international student recruitment	Insignificant	/	Insignificant	/
Number of alliances/associations on international student recruitment	Insignificant	/	Insignificant	/
Having specific housing support for international students	Insignificant	/	Insignificant	/
Having specific classroom for international students	Insignificant	/	Insignificant	/
Having specific dormitory for international students	Significant	1	Insignificant	/
Having scholarship for international students	Insignificant	/	Insignificant	/
Number of EMI programmes	Significant	3	Significant	4
Number of international faculty members	Significant	4	Significant	5
Having international institution-level accreditation	Insignificant	/	Significant	2
Number of international program-level accreditation	Insignificant	/	Insignificant	/

3.5 The experience of international students in Viet Nam

Between August and September 2024, an online student survey was circulated to 240 Vietnamese HEIs, asking them to forward it to current and past international students, including long-term and short-term students—the study aimed to explore international students' experiences in Viet Nam. Since data collection occurred in late summer and early autumn, when most international students have not yet returned to their campuses in Viet Nam, the response rate was lower than initially expected. After two months of data collection, we obtained 149 responses: 86 male (57.72 per cent), 62 female (41.61 per cent), and one non-binary respondent (0.67 per cent). The international students who responded came from 20 countries, with the largest group from Laos (59 respondents, 39.60 per cent), followed by Cambodia (22 respondents, 14.77 per cent) and China (17 respondents, 11.41 per cent). Additional respondent details, including learning majors, financial status, host institutions, and the language of instruction, are provided in Appendix E3, E4, E5, E6.

Figure 16 presents the average evaluation of international students' experiences across various dimensions while studying and living in Viet Nam, including Personal Improvement, Educational Quality, Living and Learning Environment, Costs, Social Connections and Geographic Proximity, Institution Image, Institution Facilities, and Employment Opportunities. Each dimension comprises several sub-dimensions, with each sub-dimension corresponding to specific questions. For each question, international students rated their experiences on a 5-point Likert scale, ranging from 1 (poor experience) to 5 (excellent experience).

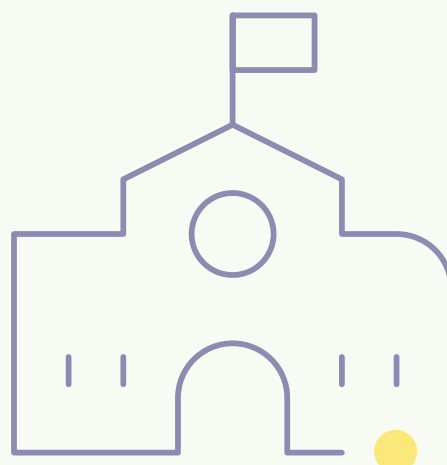
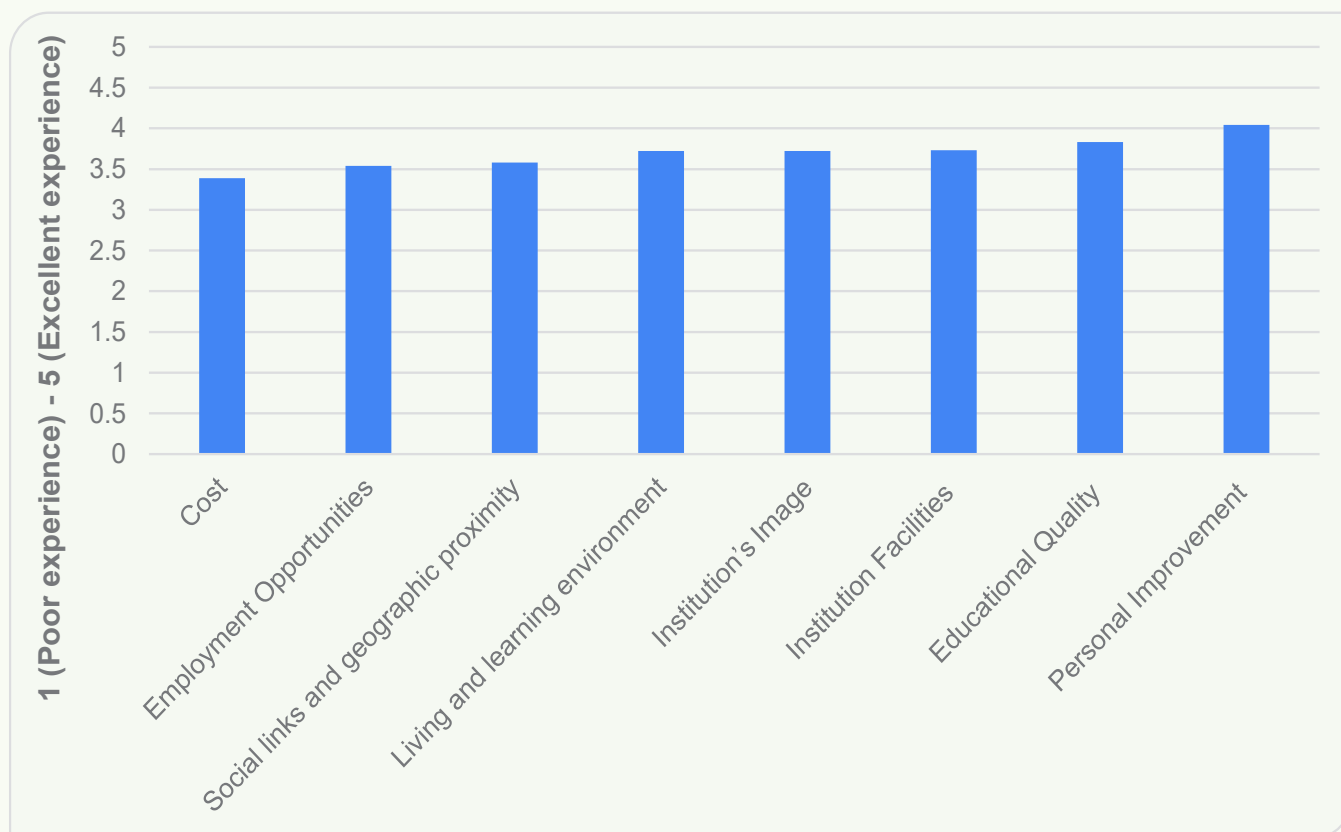


Figure 16: Average evaluation of international students studying in Viet Nam (per dimension)



Source: Survey with Vietnamese higher education institutions



Figure 17: Average evaluation of 149 international students studying in HEIs in Viet Nam (per sub-dimension)



Most international students' experiences in Viet Nam across different sub-dimensions range from 3 to 4, indicating an average to good experience. The only sub-dimension that scores notably higher, with a mean of 4.11, is 'Experiencing a different culture while studying in Viet Nam'.

Following this, the sub-dimensions with the highest scores, though below 4, include:

- Interest in learning Vietnamese (3.97)
- Viet Nam as an exciting place to live (3.95)
- Wide range of courses and programmes for overseas students (3.89)
- Host institutions in Viet Nam have high-profile instructors (3.87)
- Educational qualifications from host institutions in Viet Nam are recognised by home institutions (3.87).

At the other end of the spectrum, the sub-dimensions with the lowest scores include: The tuition fees of Vietnamese HEIs are relatively lower than those in home countries and/or other countries (3.23), Ability to work during the course to support study while in Viet Nam (3.27), External organisation scholarships to study at host institutions in Viet Nam (3.30), Home institution scholarships to study at host institutions in Viet Nam (3.37), and Awareness of career prospects in Viet Nam for international graduates (3.42).

To triangulate the findings obtained from the survey of international students, we also conducted in-depth interviews with experts familiar with recruiting and managing international students in Viet Nam. Specifically, these experts include managers or staff members from Vietnamese host HEIs for international students, representatives from agencies recruiting international students to Viet Nam, and researchers specialising in international student studies. The interview content closely mirrored the questions posed to international students in Viet Nam.

The in-depth interviews served two main purposes: (i) to compare the findings with those from the international student survey and (ii) to seek possible explanations and implications for the insights derived from the survey findings.

Overall, the findings from the in-depth interviews are largely consistent with those of the international student survey. Specifically, most experts involved in the interviews highlighted factors such as:

- The cultural environment of Viet Nam
- Opportunities to learn Vietnamese
- An exciting place to live

Given these findings, all participants agreed that Viet Nam could potentially recruit more short-term international students through study tours and exchange programmes. However, as the institutional survey findings show, the number of short-term international students in Viet Nam has consistently been lower than that of long-term students over the past five years. Consequently, Viet Nam's government and HEIs should focus more on attracting short-term international students in the future.

The survey sub-dimensions of the findings relating to financial issues, such as cost of living and scholarships, received the lowest scores from international students are somewhat surprising. However, according to the experts, these results are understandable when considering the nationalities of international students in Viet Nam. Most respondents to the survey come from neighbouring countries like Laos, Cambodia, and China, which have similar or lower economic conditions. Therefore, it is foreseeable that these students do not perceive tuition fees as low or scholarships as plentiful. Consequently, Viet Nam's government and HEIs should recognise that financial incentives may no longer be a competitive advantage in attracting international students.

Additionally, the low scores for sub-dimensions relating to work opportunities during study and after graduation are also a concern for Viet Nam's government and HEIs. One expert argued that this is among the least supportive aspects of Viet Nam's educational environment. Under current legislation, international students in Viet Nam are not permitted to work, unlike in many other countries, where they can work up to 20 hours per week. Some interviewees, who are university managers, reported that they have attempted to help international students find suitable paid internships at local firms; however, since Vietnamese law prohibits international students from working, they have had to bypass this restriction through scholarship programmes. Specifically, international students work as interns at local firms and, in return, receive scholarships from these firms. While this arrangement is temporarily workable, interviewees expressed hope that regulations around work permissions for international students will be relaxed. Similarly, the legislation does not support international students staying in Viet Nam to work after graduation. According to one expert, Viet Nam might consider adopting a policy extending student visas for one or two years post-graduation, providing international students with opportunities to look for jobs there.



Viet Nam as the next study destination in Southeast Asia: international student hub

This section studies the prospects for Viet Nam as a new study destination in Southeast Asia for international students. This is approached at two two-levels:

- National level: Viet Nam as the next international education study destination in ASEAN
- Secondary level: Establishing international education hubs in Viet Nam - zones earmarked for global education to attract international providers, programmes, students, and scholars.

4.1 Creating the right environment for globally mobile students at the national level

This research discusses policies to support Viet Nam's journey towards becoming a new international education hub in Southeast Asia. It focuses on helping the creation of an enabling environment for international student mobility and the establishment of dedicated international education hubs.

4.1.1 National policy frameworks for international higher education

This study adapted the British Council's Global Gauge framework study to national policies and environment for international higher education. This simplified analysis considers a range of indicators, which include the following measures:

- Does the country have an international education strategy?
- Does the country's international education strategy have well-articulated objectives and measurable targets?
- Does the country have a national education brand?
- Does the country have systematic data collection on international students and other areas of internationalisation related to the global education strategy (e.g., inbound and outbound student mobility, student exchanges, international programmes, etc.)?
- Are well-defined student visas granted for the duration of the respective course (e.g., a four-year course requires a four-year visa)?
- Are there opportunities for international students to work in parallel with their studies or upon graduation (post-study work)?

4.1.2 Lessons from other global study destinations

Our analysis of the seven policy areas compares Viet Nam with established education hubs like Malaysia, UAE and Taiwan. It benchmarks those against well-established global study destinations like the UK and Australia. The analytical findings are presented in Figure 18.

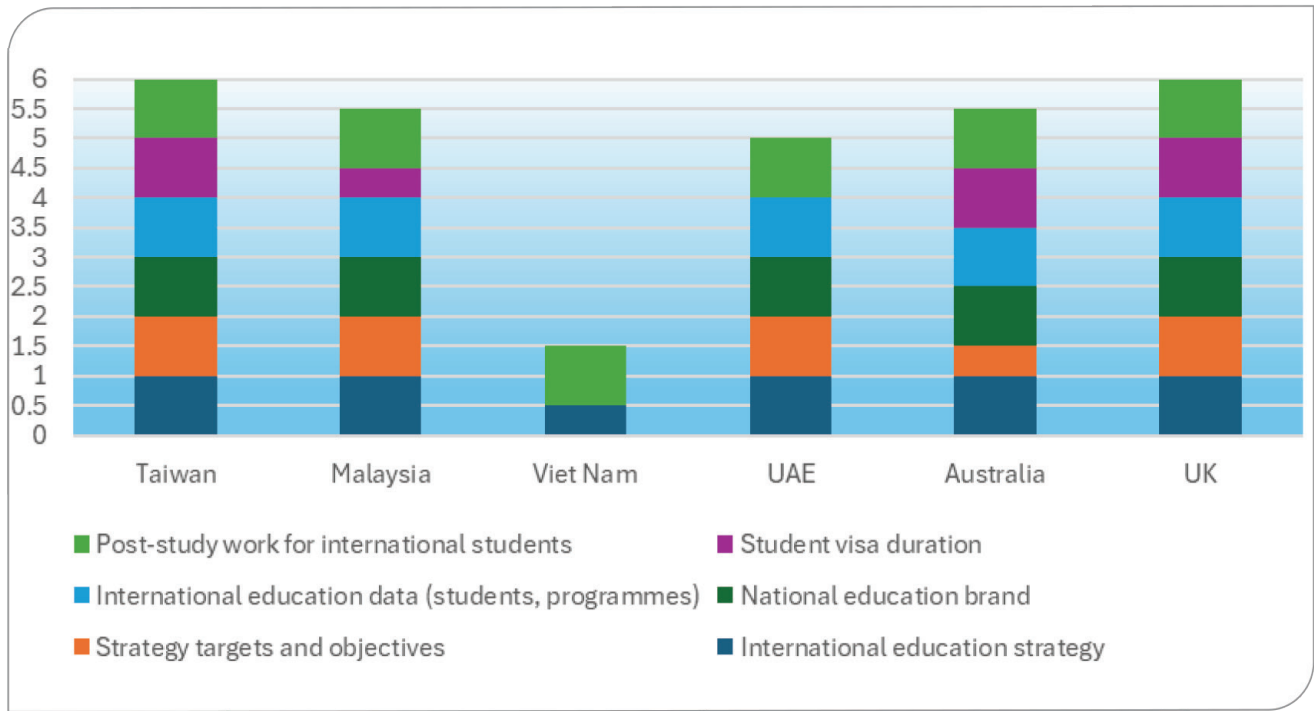
Viet Nam's government's commitment to internationalisation, evidenced by bilateral agreements for international cooperation in education, is a significant strength. Another advantage is the country's visa policy environment, which enables international students to access post-study work opportunities and be accompanied by their dependents. However, an area which disadvantages students, as in many other ASEAN countries, is that their student visa does not match the academic course length and requires annual renewal.

Other global study destinations enjoy the benefits of a clear, well-developed national education brand that signals quality education and projects welcome. A dedicated information portal and student support often aid this. This can include national campaigns to promote Viet Nam as a safe, affordable, and culturally rich destination for international students. While the country's policies appear to allow international students to stay for post-study work, the interviewees in the earlier sections highlighted that this area can be improved.

Detailed and systematic data collection enables the respective agencies to track progress towards meeting their targets. The country's regulatory bodies can use data to monitor student outcomes, the quality of education provision, and the ongoing needs of the international student population.

Streamlined student application processes, recognition of previous degrees and qualifications, transparent entry requirements, fair assessments of international students' learning, expansion of EMI programmes, and the availability of well-publicised scholarships and other means of student support facilitate streamlined transition into the respective national HE systems.

Figure 18: National policies for international higher education engagement



Notes: A positive response is scored as one point; if the criterion is partly met, the score is 0.5; if it is not met, it is 0. Two comparator countries, the UK and Taiwan, have full marks.

4.2 Natural hot spots for international students

There is a well-documented positive relationship between urbanisation levels and income. This is typically explained by the advanced infrastructure supporting the area's economic development.

Marginson (2018) notes that 'the most spectacular enrolment growth at scale' occurred in localities with high economic growth and urbanisation. Worldwide, higher education is concentrated in cities. Typically, well-developed urban infrastructure, such as strong communication and transport links, ensures students, staff, and all stakeholders can access the respective institutions.

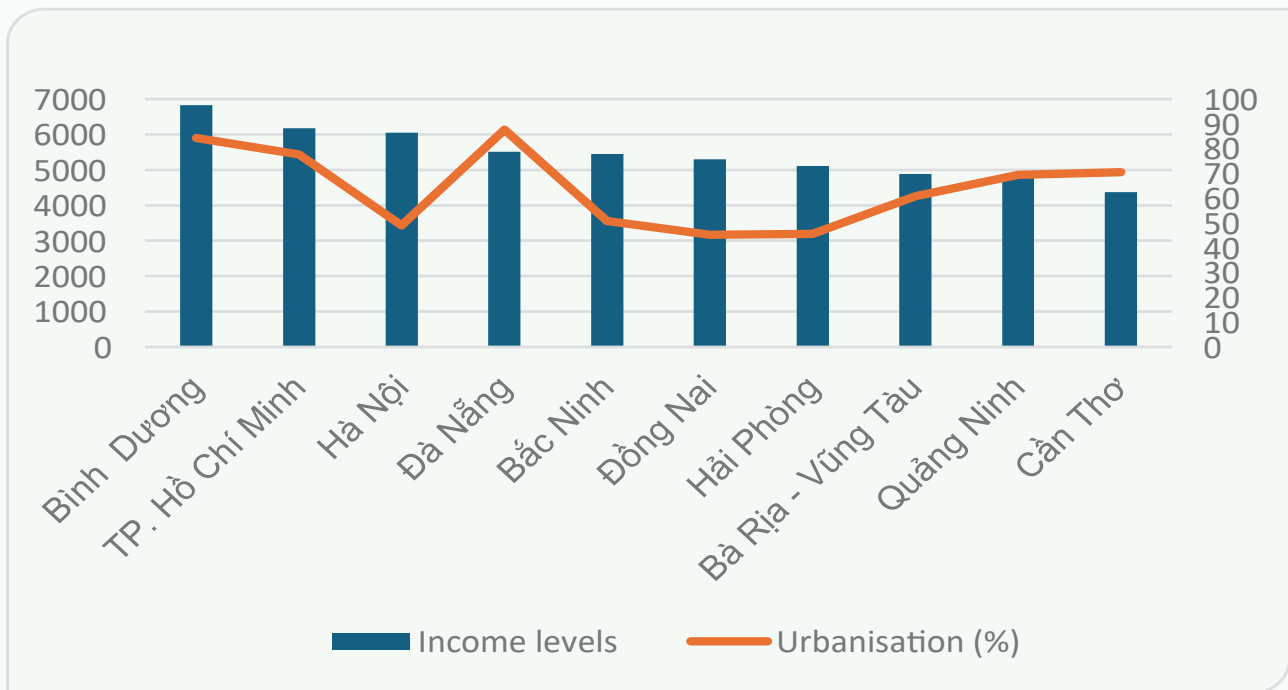
The literature shows that a higher level of urbanisation positively impacts economic growth. This is particularly relevant to ASEAN countries. The concentration of resources and labour in urban centres often results in higher returns on public investment and better economic outcomes. As countries develop economically, cities emerge as centres for industry and commerce, drawing populations from rural areas seeking better employment opportunities. This migration fuels further urbanisation, creating a cycle of growth. Viet Nam's urbanisation levels

stand at 43 per cent, indicating significant levels that will further increase the country's urbanisation level. World Bank research recognises the country's success in this area and urges the central and provincial governments to ensure that growth is sustained and delivered efficiently collectively (The World Bank, 2020).

In Viet Nam, urban areas account for approximately 70 per cent of the country's GDP, highlighting the critical role of urbanisation in economic development (Vietnam Plus, 2023). See Appendix F for details. Hanoi and Ho Chi Minh City (HCMC) are home to the country's largest populations, each hosting over 8 million people.

The chart below plots the top ten provinces in Viet Nam with the highest income levels. Ha Noi is a province with relatively lower urbanisation than other high-income areas. Ha Tay province was merged into Hanoi, which caused the urbanisation rate to fall as Ha Tay is an agricultural province. Another contributing factor is the continued immigration to Hanoi, which remains uncaptured by the national population statistics. Binh Duong, a new satellite city of HCMC, has the potential to become a hub since it has good transportation, urban planning and ICT development.

Figure 19: Income and urban levels of provinces in Viet Nam



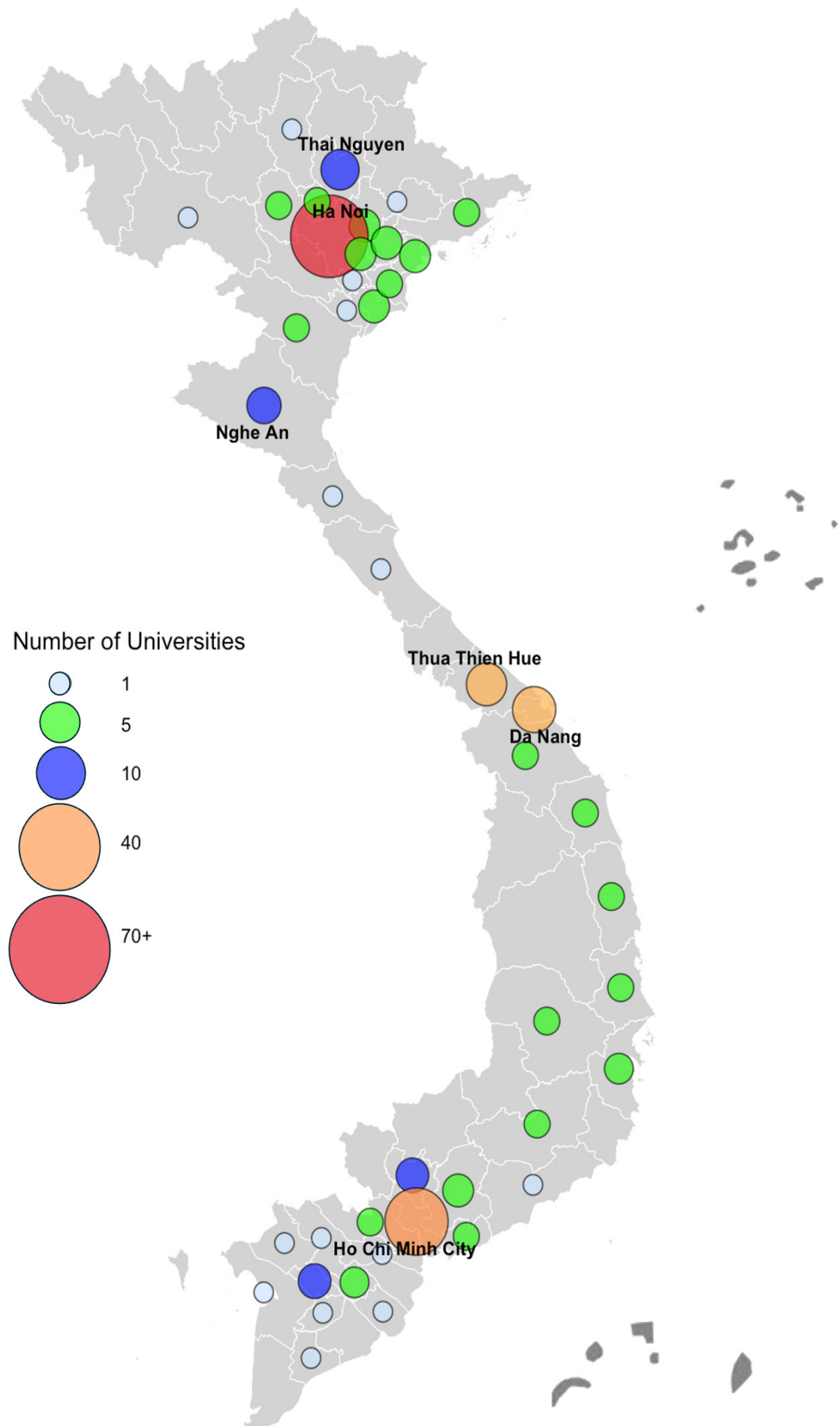
Source: <https://data.opendatacommons.org/en/dataset/per-capita-income-by-province-in-2018-in-Viet-Nam>

Based on socioeconomic data and the broader economic literature, the locations with the highest income levels and urbanisation offer the infrastructure required for the natural creation of an education hub.

Figure 20 shows the distribution of HEIs across Viet Nam. The size of the circle indicates the number of HEIs in the

respective city. Those with the most significant numbers are Hanoi (74), Ho Chi Minh (46), Da Nang (13), Thua Thien Hue (11), Thai Nguyen (9), Nghe An (6), Can Tho and Binh Duong (five each). The remaining cities host four or fewer institutions. See Appendix A for the complete list.

Figure 20: Distribution of HEIs across Viet Nam



4.3 Attempts to create education hubs in Viet Nam

While Viet Nam does not yet have an education hub or international education hub that is well-known regionally or internationally, this concept is not entirely unfamiliar. From the late 1990s to the early 2000s, the Vietnamese Government initiated several scientific and educational projects to relocate universities from congested urban areas to the suburbs. The goal was to relocate universities with small areas within the inner city (under 2 hectares) to the suburbs, with larger areas (minimum 10 hectares) to accommodate more significant numbers of students and faculty.

During this period, two projects to construct high-tech zones (including education and training) were implemented in the country's two largest cities: the Hoa Lac High-Tech Park (Hanoi, started in 1998) and the District 9 High-Tech Park (Ho Chi Minh City, began in 2002). Since then, the Vietnamese government and private sectors have invested in several projects to establish educational zones in various provinces/cities nationwide.

However, to date, no educational hub project has achieved significant success. Many have only partially operated (e.g. Hoa Lac High-Tech Park), remained unrealised (e.g. Nam Cao University Hub in Ha Nam, Viet Nam International University Township in Hoc Mon, Ho Chi Minh City) or even have requested suspension (e.g. Pho Hien University Township) due to numerous challenges. Even those that are operational have not attracted many educational institutions, especially international educational institutions, and are far from being destinations for international students like many educational hubs worldwide.

The Vietnamese government's efforts to establish education zones (or university zones) have faced several challenges that have hindered their success. These challenges can be understood through various lenses, including political, economic, social, and infrastructural factors:

1. Lack of strategic planning and coordination:

Over the past two decades, Viet Nam has launched numerous small and fragmented educational hub projects, such as the Hoa Lac High-Tech Park under the central management of the government, and provincial initiatives like Pho Hien University Township, Nam Cao University Hub, and International Education Cities in Quang Ngai and Hai Phong. These projects lacked clear objectives and coherence, with no unified national strategy guiding their development (Pham, 2022). This fragmentation has led to disjointed efforts, hindering the creation of synergies between zones. Moreover, inconsistent policies have contributed to project delays and abandonment. For instance, despite its inception in 1998, the Hoa Lac initiative only began transforming into a high-tech, knowledge-based urban centre focusing on advanced

research, education, and healthcare 25 years later.

2. Insufficient financial investment and incentives:

Developing high-tech and education zones requires substantial infrastructure, facilities, and human resources investment. However, projects like Hoa Lac High-Tech Park, Pho Hien University Township, Nam Cao University Hub, and Danang University Town have faced funding shortfalls due to perceived risks and uncertain returns. Limited state funding has caused delays, negatively impacting residents who face restrictions on building or repairing their properties. Additionally, the incentives offered have often been inadequate to attract universities and industries. For example, Viet Nam National University (VNU) lacks the necessary incentives, such as accommodation or housing, to encourage faculty to relocate to Hoa Lac High-Tech Park.

3. Logistical and infrastructural challenges:

Bureaucratic obstacles, delays in land clearance and acquisition, and slow infrastructure development have significantly hindered the progress of educational zones like Hoa Lac and Nam Cao, leading to a loss of stakeholder confidence. These zones were located in areas with underdeveloped infrastructure, such as transportation and utilities, making it difficult for institutions, staff, and students to commute efficiently. For example, Hoa Lac High-Tech Park, initiated in 1998, only introduced direct bus services from central Hanoi in 2023, with plans for a metro line still under consideration as of early 2024. Besides, the lack of comprehensive urban planning has resulted in inadequate infrastructure, further intensifying the challenges faced by the VNU in Lang Hoa Lac, preventing it from meeting its intended capacity to accommodate tens of thousands of students. Better transportation networks make HEIs more accessible to students and faculty. This is further aided by technological and educational infrastructure, including high-speed internet and advanced research facilities, and proximity to cultural institutions, libraries, and other educational resources. Urban areas also offer a larger pool of potential students, including working professionals seeking to continue their professional development or upskilling and more opportunities for industry partnerships and research collaborations. Better job prospects for graduates are typically available in urban areas, further amplifying universities' appeal to prospective students. Market scepticism regarding these zones' long-term viability and benefits also discourages potential investors and partners.

4. Lack of socio-economic integration and essential connections:

A significant challenge is the lack of integration between the newly constructed educational infrastructure and the surrounding socio-economic environment. The focus has been on building educational facilities without adequately considering the socio-economic connections with local communities (Le, 2021). This oversight has resulted in educational zones that are isolated from the economic activities and services

students and faculty need. Successful educational zones must also establish strong connections in transportation, economic activity, and academic collaboration. However, zones like Pho Hien University Township have struggled to develop these critical connections, leading to deficiencies in all three areas (Le, 2021). This failure limits the zones' effectiveness and highlights broader institutional challenges that hinder their potential.

5. Historical and cultural resistance: Educational zones in Viet Nam often encounter resistance due to their historical significance and cultural attachments. Many international students value the cultural experience their study abroad brings, and the cities are critical decision-making factors. The importance of cities is well-documented in the literature on international students' decision-making factors (McNicholas & Marcella, 2024).

Long-established institutions within the city centres are considered integral to the nation's development and heritage, challenging relocation efforts (Giáo dục Việt Nam, 2018). Besides, staff, students, and local communities are reluctant to leave established urban centres, valuing the prestige and benefits of their current locations (Bảo Ngọc & Nguyễn Bảo, 2022).

6. Institutional capacity constraints: The development of new campuses and the relocation of established universities outside urban centres in Viet Nam encounter significant institutional capacity constraints. While some universities have achieved a degree of autonomy and can manage their funding independently, others remain dependent on government budget allocations. This dependency complicates the development process, as

the procedures for utilising public funds are often not well-defined. For instance, the University of Civil Engineering is constructing a secondary campus in Ha Nam, covering over 24 hectares. The reliance on self-managed funds for this project has presented substantial challenges, underscoring the broader issue of inadequate institutional capacity to support the growth and development of educational zones (Giáo dục Việt Nam, 2018).

7. Misalignment with investor and international university priorities: The lack of success in Viet Nam's educational zones is partly due to a misalignment with the priorities of investors and international universities, who focus on feasibility and profitability. Viet Nam's regulations, such as the requirement for a minimum investment of 1,000 billion VND (approximately US\$40 million) for a new university, are perceived as excessive and out of step with these priorities. This high financial barrier discourages participation, making it difficult to attract high-quality institutions and investments, ultimately hindering the development and success of these zones. A more effective approach would involve setting lower initial investment thresholds, allowing institutions to expand gradually as they begin generating revenue, better aligning with investor expectations and reducing financial risk.

To achieve this success, Viet Nam needs to address these multifaceted challenges through improved strategic planning, increased investment, streamlined regulations, and enhanced infrastructure development. Focusing on aligning incentives with the priorities of investors and international universities will also be critical for attracting high-quality institutions and fostering the growth of vibrant educational hubs.

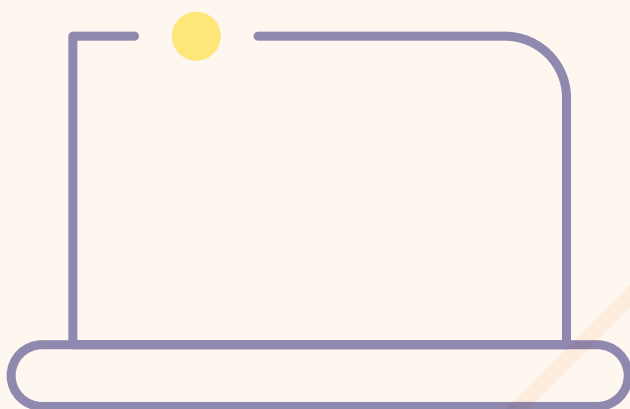
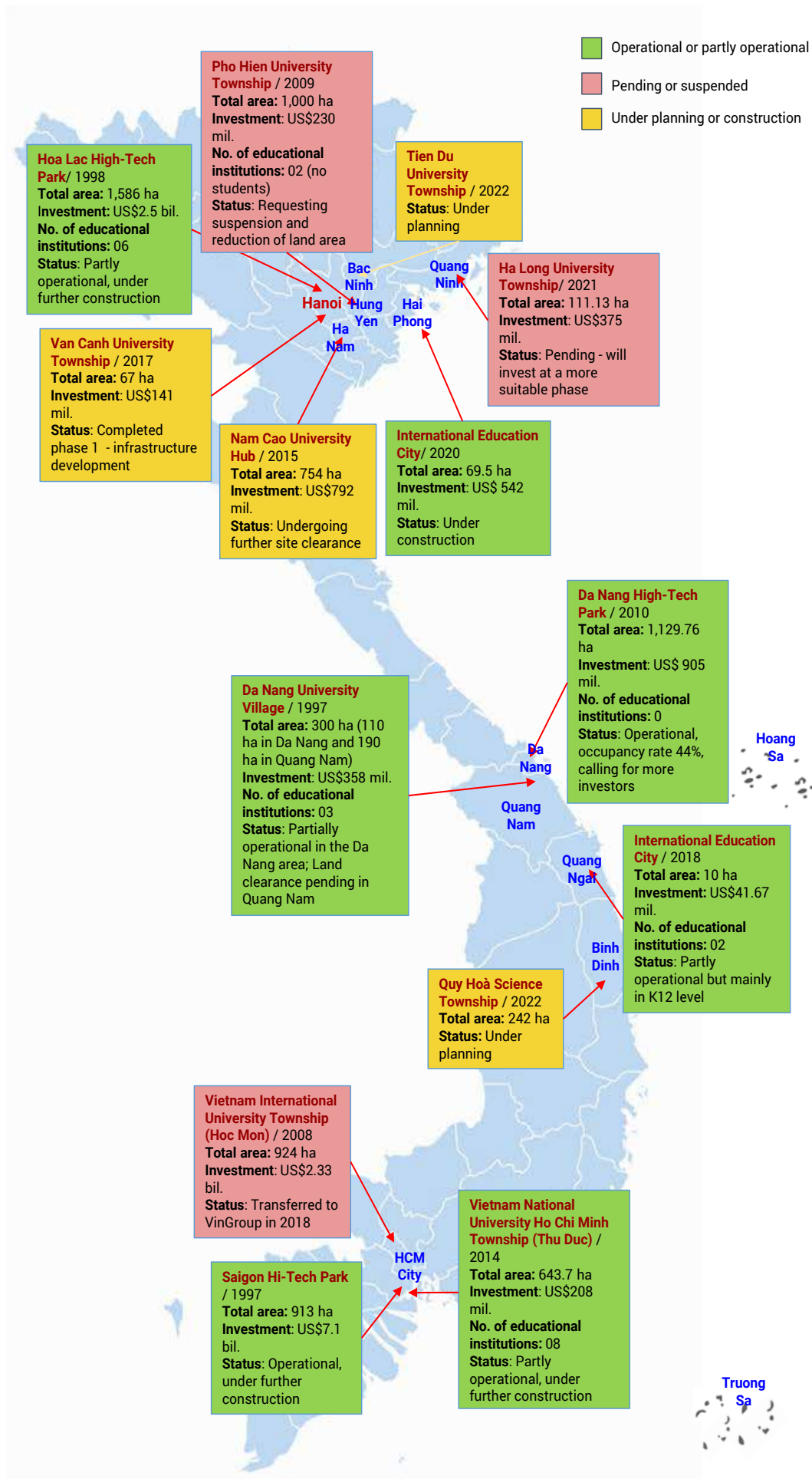


Table 5: Main types of education hubs



A detailed list of hubs is available in Appendix G of this report.



International Education Hubs and Viet Nam

Over the past twenty years or so, TNE has emerged as a critical aspect of higher education internationalisation, demonstrating its potential to help meet skills and training needs in countries where demand might outstrip supply and widen access to quality international education for students who might not be able or willing to travel internationally.

During this period, the international education community has seen significant growth in TNE across the board, in terms of the number and types of education providers offering TNE, models of TNE operations and delivery, the number of students studying on TNE programmes, and the number of countries involved in TNE provision either as receiving or sending countries. Growing TNE is now an explicit target for an increasing number of international education providers and ministries of education.

In connection with this growth, dedicated education hubs have emerged. They are continuing to emerge in different regions of the world, aimed at attracting the services of quality foreign education providers and helping to meet the growing demand for quality international education 'closer to home'.

Although operating within different regulatory and national environments, these hubs face similar challenges and opportunities for growth. One common challenge is developing an operating context conducive to attracting reputable international education providers and talent. Another common opportunity is the growing global demand for quality international education near home, which has intensified post-pandemic.

Education hubs can indeed play an increasingly strategic role going forward in an international context where there is a trend toward the regionalisation or 'de-globalisation' of international student mobility and a growing number of countries seeking to leverage inbound TNE to train and retain talent locally.

This section provides a comparative overview of international education hubs to advance understanding of their operating methods, rationale, challenges, and growth opportunities. Thus, it can help inform Viet Nam's decision on the best approach to adopt if it considers establishing a dedicated international education hub in the country.

5.1 Hub Profiles

5.1.1 Education City, Qatar

Education City was established in 1995 by the Qatar Foundation, a private foundation of public interest, with the specific goal of helping Qatar develop its human capital

and supporting its transition into a knowledge-based society based on the three pillars of education, research, and community development.

To achieve this objective, a decision was made to develop a new city that would facilitate creating an integrated education and research ecosystem. This included inviting established international universities to address the country's skills and knowledge needs and priorities.

The Education City project has received significant financial support over the years from the Qatar government, including the donation by the Emir of Qatar of the 1200-hectare piece of land on which it has been developed. However, the governance of Education City remains independent from the government.

Currently, seven foreign universities and one local university are operating in Education City, offering a broad range of programmes in different fields. These include:

- Virginia Commonwealth University School of Arts (USA), established in 1999
- *Carnegie Mellon University (USA), 2004,*
- *Weill Cornell Medicine (USA), 2001*
- *Texas A&M (USA), 2003 (in teach-out)*
- *Georgetown University (USA) 2005,*
- *Northwestern University (USA), 2008*
- *HEC Paris (France), 2010*
- *Hamad Bin Khalifa University (Qatar), 2010*

Education City also offers primary and secondary education through schools directly operated by the Qatar Foundation.

There are currently just over 3,500 students enrolled across the eight universities, 25 per cent of which are international, and another 25 per cent are expats. The expat population is significant in Qatar, representing about 85 per cent of the total population.

The Qatar Foundation provides a significant amount of services to the education providers it invites to operate in Education City. It pays for the facilities and staff salary, although it retains student fees, which are set at the same level as those charged by the home campus. Since university buildings are owned by Qatar Foundation, there is a lot of scope for sharing learning facilities. The student centre is also shared and managed by Qatar Foundation. In addition, students can register for classes at other

universities operating in Education City. To facilitate this “multiversity” model the different universities’ timetables are synchronised.

Qatar Foundation also provides housing for students and manages student financial aid. Qatari students have generous government-supported scholarships. International students have a more limited number of scholarships, but they can access student loans at 0 per cent interest, and need-based loans. International students who decide to live and work in Qatar after graduation will have 25 per cent loans written off for each year they stay.

A precondition for foreign universities to operate in Education City is to guarantee that the quality of the education they offer in Qatar is the same as that offered at the home campus. Their provision in Qatar must be accredited by the home countries’ authorities and, where applicable, by the relevant professional accreditation bodies. There are plans to establish a national quality assurance body in Qatar, which will eventually oversee foreign provision in Education City.

Education City also facilitates industry and community engagement, including through its Qatar Science and Technology Park, with many incubator companies, as well as by hosting the Qatar National Library and the National Equine Centre.

Some of the key challenges for Education City have centred on the full realisation of a “multiversity” model, avoiding hosted universities working in silos and facilitating deeper interuniversity cooperation across their teaching and research activities.

Another perceived challenge has been encouraging foreign universities to do things differently from the home campus, developing academic programmes that respond more closely to the local socioeconomic and cultural context. Cultural diversity might also have been a challenge in attracting and retaining some foreign institutions.

5.1.2 Dubai Free Trade Zones, United Arab Emirates

Dubai is host of about 30 Free Trade Zones (FTZs), designated areas to facilitate trade in goods and services. They generally focus on particular service and industry sectors, such as the Dubai Media City, Dubai International Financial Centre, and Dubai Healthcare City. Although a number of these FTZs host foreign universities, most are concentrated in two FTZs dedicated to education and knowledge, Dubai Knowledge Park (DKP) and Dubai International Academic City (DIAC).

DKP and DIAC were established respectively in 2003 and 2005 by TECOM, a subsidiary of Dubai Holding owned by the Government of Dubai, now a publicly traded company, which has played a key role in developing sector-focused FTZs across the emirate of Dubai in strategic knowledge-based economic sectors. The creation of FTZs has been

central to Dubai’s economic diversification strategy, which aims to establish a knowledge-based economy and attract foreign investment.

The establishment of the DKP and DIAC has played a critical role in the success of this strategy. They have attracted established foreign education providers to cater to the education and training needs of a growing knowledge economy sector, the growing presence of multinationals, and a growing expat population. Over 90 per cent of Dubai’s population is non-national.

There are 39 foreign higher education providers from a large range of sending countries operating in different FTZs in Dubai, enrolling over 25,000 students. Most of these students are ex-pats, and about 35 per cent are international, with few Emirati students. DKP hosts 11 foreign institutions and DIAC 14, offering a broad range of undergraduate and postgraduate programmes across different subject areas. The DKP and DIAC-based foreign universities include:

Dubai Knowledge Park:

- *University of Wollongong (Australia), established in 2002*
- *Islam Azad University (Iran), 2003*
- *Middlesex University (UK), 2004*
- *Heriot Watt University (UK), 2005*
- *SAE Institute (Italy), 2005*
- *University of Manchester (UK), 2006*
- *University of Bradford (UK), 2008*
- *Strathclyde Business School (UK), 2011*
- *Abu Dhabi University (UAE), 2017*
- *EN Normandie Business School (France), 2023*
- *Harrisburg University of Science and Technology (USA), 2023*

Dubai International Academic City:

- *Shaheed Zulfikar Ali Bhutto Institute of Science and Technology (Pakistan), 2003*
- *Manipal Higher Education Academy (India), 2003*
- *British University in Dubai (UAE), 2004*
- *Institute of Management Technology (India), 2006*
- *The National Institute for Vocational Education (UAE), 2006*
- *Esmod French Fashion Institute (France), 2007*
- *Murdoch University (Australia), 2008*

- *Saint Joseph University (Lebanon), 2008*
- *Amity University (India), 2011*
- *Birla Institute of Technology and Science Pilani (India), 2011*
- *SP Jain School of Global Management (Australia), 2012*
- *Curtin University (Australia), 2017*
- *University of Birmingham (UK), 2018*
- *De Montfort University (UK), 2021*

These hubs are only for higher education providers. However, there is a wide range of international K-12 schools across Dubai, outside of the FTZs, based on a micro-city model, serving over 300,000 students.

TECOM typically invests in buildings and infrastructures that foreign providers rent for teaching and academic activities. TECOM also facilitates the provision of a range of shared facilities, such as classrooms, auditoriums, student housing, and food halls.

There is no formal system of credit transfer arrangements between universities operating in the FTZs. Teaching might be delivered exclusively by home campus lecturers or through locally recruited teachers or mixed models.

Foreign providers operating in the FTZs are exempted from federal-level accreditation requirements. They can be regulated exclusively by the Dubai regulator, the Knowledge and Human Development Authority (KHDA), or the federal Commission for Academic Accreditation (CAA). KHDA requirements have traditionally been less burdensome and prescriptive, placing reliance on the good standing of the foreign institutions with their home country's regulator. However, the lack of CAA accreditation has implications for qualification recognition, since qualifications obtained from FTZs providers without CAA accreditation will not be recognised at the federal level outside of Dubai for public sector purposes.

KHDA's approach to regulation has changed and adapted over the years. In particular, it has allowed more flexibility for education providers with a good track record in the type of programmes they are allowed to offer in Dubai to meet local needs better. It has also increased the level of oversight to compensate for the lack of quality assurance from sending countries' authorities.

There is a close working relationship between TECOM, the similar commercial companies managing the other FTZs, and KHDA. KHDA, as the regulator, has the responsibility to approve requests from foreign providers to open operations in the FTZs. However, it depends on management companies such as TECOM for space, while TECOM depends on KHDA for the pipeline. These two entities, however, operate independently.

The FTZs have been successful in attracting international

education providers. Dubai has the highest concentration of international branch campuses worldwide. The impact on the local economy has also been significant, with an increasing number of students supporting the growth of the local economy, including by staying on and entering the workforce.

The key to this success story is seen to depend on different related key factors, such as:

- *The clear vision and commitment of Dubai to become an education and knowledge hub;*
- *The initial significant investment in the construction of DKP and DIAC, and more generally, the availability of private investment to support the setting up of foreign education operations;*
- *The flexible and responsive regulatory environment;*
- *The economic growth and dynamism of Dubai itself.*

There is significant scope for further growth of TNE operations in Dubai, as the Emirate is set to grow its economy by 2033, which will require growth in education provision from k-12 to university level. The Dubai Economic Agenda 2033 sets critical priority areas for growth. In the short term, these are aviation, hospitality, fintech, design, and gaming, and in the longer term, energy, vertical agriculture, and space. To better contribute to the Dubai economic plan, it is expected that the Emirate, through KHDA, will adopt a more planned, selecting, and targeted approach toward attracting foreign providers. Growing foreign higher education provision will also be critical to help retain the ever-increasing high school student population.

5.1.3 EduCity Iskandar, Malaysia

EduCity Iskandar is a 123.5-hectare multi-campus education city, owned and managed by Iskandar Investment Berhad (IIB). IIB is an investment holding company set up to catalyse the strategic development of Iskandar Puteri in the education, creative, tourism and leisure, as well as health and wellness sectors.

IIB is owned by Khazanah Nasional Berhad (60 per cent), the sovereign wealth fund of Malaysia, the national Employees Provident Fund (20 per cent), and Kumpulan Prasarana Rakyat Johor (20 per cent), a private limited company wholly owned by the State Government of Johor.

Iskandar Puteri is the administrative capital of the state of Johor in Malaysia. It is the largest urban integrated development in Southeast Asia, comprising 24,000 acres of catalytic developments, situated along the Straits of Johor at the southern end of the Malay Peninsula in close proximity to Singapore.

EduCity was established in 2008 to contribute to the development of Iskandar Puteri as an integrated urban

development by attracting quality foreign education providers. It builds learning facilities for providers to rent or purchase and offers a range of shared services and facilities, such as student accommodation, recreational and sports facilities, and marketing. EduCity can also assist education providers wishing to operate in the hub in obtaining the required licence and programme accreditation from the Malaysian Qualifications Authority and help engage with industry and employers.

Initially aiming to attract foreign universities offering programmes in different niche areas, it now adopts a more open market approach, leaving the decision of the type of academic offer entirely to institutions. This is also due to the realisation that to support the financial viability of TNE operations; foreign providers need to offer generalist programmes capable of recruiting a larger number of students at lower costs.

Four foreign universities are currently operating in Educity, one Dutch-Malaysian higher education provider, a local training academy, and three international k-12 schools. Foreign universities include:

- *Newcastle University Medicine Malaysia (UK), established in 2011*
- *Netherlands Maritime Institute of Technology (Malaysia), 2011*
- *Kolej MDIS Malaysia (Singapore), 2012*
- *Raffles University (Singapore), 2012*
- *University of Reading (UK), 2016*

Overall, there are over 4,000 students across all institutions, 60 per cent of whom are international. Many of these international students are the children of expats working in Singapore but staying in Iskandar Puteri because of its lower cost of living.

Over the years, EduCity has played a role in the development of the Iskandar Puteri through the financial contribution of its students, with plans to double the number of students and foreign higher education providers over the next decade. The EduCity Sport complex also plays a role in supporting community integration by hosting a range of events.

However, the hub's success in attracting foreign education providers has not met the initial ambitions so far. The main mutually-agreed challenge has been the failure to deliver and invest in planned infrastructure projects on time, including transportation and shared student services. The difficulties in creating jobs and industries in a green field development such as Iskandar Puteri have also contributed to the failure to integrate EduCity with the local and regional socio-economic fabric.

There is a perception that these factors have contributed to EduCity's failure to successfully tap into the broader

Johor regional student market and the international student market. Kuala Lumpur as an integrated urban capital remains the preferred destination for national and international students in Malaysia. The development of high-speed rail connecting Iskandar Puteri to Kuala Lumpur and Singapore might be able to resolve the current geographical isolation of EduCity.

Another perceived challenge to establishing further and successful TNE operations in EduCity is the developmental model adopted, which places most of the financial set-up burden on foreign providers. Providers wishing to operate in EduCity are requested to fund the development of the facility, extending the length of time for returns on investment. The model adopted by other international education hubs, with significant local subsidies and investment in infrastructure development, is generally seen as a more attractive model.

5.1.4 Ras al Khaimah Academic Zone, United Arab Emirates

RAKEZ Academic Zone is an educational hub operated by the Ras Al Khaimah Economic Zone (RAKEZ). RAKEZ Academic Zone was established in 2017 by the Emirate's government to attract quality international education providers, and help the Emirate achieve its vision of building an inclusive and accessible educational ecosystem capable of catering to a growing expat community and industrial sector.

Owned by the RAK Government it is currently located in a 9-hectare dedicated area, hosting nine international branch campuses which offer undergraduate and postgraduate programmes in a different range of disciplines:

- *University of Bolton (UK), established in 2008*
- *Swiss Business School (Switzerland), 2010*
- *Munnar Catering College (India), 2011*
- *Bath Spa University (UK), 2014*
- *University of West London (UK), 2017*
- *University of Stirling (UK), 2018*
- *Northwood University (USA), 2021*

The vast majority of students enrolled in these foreign institutions in RAKEZ are expats, with about 15 per cent international students. RAKEZ Academic Zone also hosts four international K-12 Schools.

RAKEZ Academic Zone is conceived as a one-stop shop for international education providers wishing to establish a presence in the Emirate. The Academic Zone helps with building facilities and infrastructures at favourable prices (either for purchase or rental) for education providers, which generally operate through local investors. The Academic Zone also offers a wide range of professional

guidance and advice to help providers set up their operations, including helping with obtaining government licences to operate, as well as facilitating engagement with industry. There are shared student accommodation facilities available, with the plan to build more shared environments in the future. There are also scholarships and internships opportunities managed by the Academic Zone.

The Academic Zone has also established its own regulator and quality assurance body, now independent and reporting directly to the RAK Government. Foreign providers need to be in good standing with their home country's quality assurance authorities and can only offer programmes in the Academic Zone that they already offer at their home campus. Whilst compliance with the local requirements set out by the Academic Zone regulator is necessary to be able to set up operations and continue to operate, compliance with the federal-level accreditation authority of the Commission for Academic Accreditation (CAA) is voluntary. However, CAA accreditation is necessary for the federal recognition of qualifications obtained within the Academic Zone.

Since its establishment, there has been year-on-year growth in the number of institutions and students, with a positive financial return for the Academic Zone and the Emirate of Ras al Khaimah. The Academic Zone is seen to be well positioned in tapping on the existing local industrial ecosystem, in particular in manufacturing, which is more developed than in other Emirates, including Dubai.

The main strategic priority going forward is to continue to attract new providers, especially those offering programmes in the priority areas of tourism and hospitality, manufacturing (ceramic), pharmaceuticals, and the automotive industry.

5.1.5 Incheon Global Campus, South Korea

Incheon Global Campus (IGC) was established in 2012 in the Incheon Free Economic Zone (IFEZ) by the Government of South Korea. The main rationale for its creation was to support the development of high-quality human resources in the country and to revert student mobility flows by retaining national talent locally and attracting international talent. The IGC was also seen as being able to meet the needs of the growing expat community working in the IFEZ.

It is an initiative entirely funded by the national government, Incheon Metropolitan City, and the IFEZ. Spanning an area of 29.5 hectares, it aimed in its first phase of development to attract five high-quality research-oriented foreign universities and 5,000 students. It currently hosts five universities recruiting together about 4,200 students on a range of different undergraduate and postgraduate programmes:

- *State University of New York – Stony Brook (USA), established in 2012*

- *State University of New York – Fashion Institute of Technology (USA), 2012*
- *George Mason University (USA), 2014*
- *Ghent University Global Campus (Belgium), 2014*
- *The University of Utah Asia Campus (USA), 2014*

Having nearly achieved the objective for the first phase of development, the IGC has entered its second phase, aiming to double the number of foreign providers and students. The IGC does not include K-12 schools.

Most students currently studying at IGC providers are from South Korea (90 per cent), but the plan is to increase the proportion of international students going forward as part of the National Study Korea 300K initiative, aiming to increase the number of international students in the country from the current 200,000 to 300,000 by 2027.

IGC provides teaching and learning facilities to international providers operating in the hub. For the first few years, they can use these facilities for free before starting to pay negotiated facilities fees and eventually rent. IGC also provides and manages students' accommodation and shared student facilities. It also offers central IT support, marketing, and student recruitment support.

Foreign universities operating in IGC need to obtain academic programme approval from the Ministry of Education, although the accreditation process is lighter than that of national universities, taking into account the pre-existing accreditation from their home countries' authorities.

So far, the main beneficiaries of IGC have been Korean students who have acquired international competencies and education at a lower cost than those who have travelled overseas. This is seen to have also benefited the Korean economy by helping to train and retain local students. IGC is also seen to have played an important role in helping develop and support the growth of the city of Incheon.

Some of the main challenges to the growth of IGC are the capacity to recruit leading academics from the home campus, engage in competitive research, and the dwindling student population in Korea. Demographic challenges point to the critical importance of growing international student recruitment for the realisation of the second phase's objectives and the hub's continued growth.

Another priority going forward will be to enhance the research capabilities of the institutions operating in IGC now that they have embedded themselves in the country as teaching institutions. Recently, IGC has been able to attract a research centre from Stanford University.

5.1.6 Uniciti International Education Hub, Mauritius

Uniciti International Education Hub (UIEH) is an initiative of the Medine Group, a company established in 1911 as a sugar producer and now with a diversified portfolio in agriculture, leisure, property businesses, and education. The Medine Group is the largest landowner in the country, owning about 6 per cent of the land of Mauritius in the west coast of the island.

UIEH was established in 2013, initially as Medine Education Village, to support the Government of Mauritius in its plan to diversify the national economy from tourism and make the island an education hub capable of providing quality international education to Mauritian students, the African region, and beyond.

Establishing an education hub was also seen by the Medine Group as key in the realisation of its 2005-2025 master plan, which included the development of a smart city (set over 350 hectares on the west coast of Mauritius) capable of fostering sustainable development, spatial integration, and social integration. Education and innovation were seen as underpinning and cutting across all three objectives, and an area of 32 hectares was earmarked for education and research activity.

UIEH is owned and run solely by the Medine Group, with no Government involvement. However, it is not a free economic zone, and national regulations apply to UIEH as in other parts of the country. In particular, foreign providers wishing to establish operations in UIEH need to obtain approval and programme accreditation from the Higher Education Commission as per national requirements.

There are currently nine foreign tertiary education institutions and one local institution operating in UIEH offering a broad range of undergraduate and postgraduate programmes in different fields. These include:

- *Amity University (India), established in 2011*
- *Vatel (France), 2014*
- *Middlesex University (UK), 2015*
- *Université Paris Panthéon-Assas (France), 2015*
- *ENSA Nantes (France), 2016*
- *MCB Institute of Finance (Mauritius), 2019*
- *SUPINGO / Ionis School of Management and Technology (France), 2022*
- *The American Business School of Paris (France), 2022*
- *Swansea University (UK), 2023*
- *Vellore Institute of Technology (India), 2023*

In addition, UIEH has established a partnership with FutureLearn, the UK-based provider of MOOCs and micro-credentials.

Currently, just over 2,000 students study across all nine institutions operating in UIEH, 45 per cent of whom are international. A range of nursery, primary, and secondary schools also contribute to providing a comprehensive education ecosystem.

Institutions wishing to operate in UIEH can adopt different operating models. They can rent premises made available by UIEH to teach their own courses or co-deliver with UIEH. They can franchise their courses for local delivery, either through UIEH or other local delivery partners. Institutions can also opt to establish a branch campus through a joint venture with UIEH, such as in the case of Middlesex University.

UIEH also offers a range of paid-for services such as support with marketing, obtaining local accreditation, the campus experience, student visas, and recruiting lecturers. There are, in addition, central services available to all students, such as residence halls, and leisure facilities.

UIEH is seen to contribute to the local and national communities and economies in different ways including through:

- *Widening access: making international education available to students who cannot afford to travel internationally for a foreign degree, primarily from Mauritius and from the African continent, as well as the Indian subcontinent;*
- *Helping to respond to local skills needs and meeting SDGs: through collaboration with foreign providers bringing the required expertise and knowledge in key industries, such as IT, Digital Engineering, Health, and Business, and SDGs-related areas such as access to water for all, new types of energy, and international partnerships;*
- *Attracting foreign investment in the country: both in the form of international providers and international students;*
- *Bringing talent to the country: through international student recruitment (the government allows students to stay for 3 years after graduation to work).*

The main strategic priority for the hub, going forward, is to attract new foreign providers capable of continuing to deliver on these benefits, contributing to areas of strategic priorities for the country and the Medine Group. For example, Medine has recently invested in the construction of a hospital and medical hub, requiring training in health-related fields, and has the intention to make its smart city into an innovation ecosystem.

5.1.7 Hainan Li'an International Education Park, China

Hainan Li'an International Education Park was jointly established by the China Ministry of Education and the Hainan Province in 2020 to help support the economic development of Hainan through the establishment of overseas universities' outposts.

The Education Park is one of 11 parks in the Hainan province established to support the construction of the Hainan Free Trade Port, which enjoys favourable national policies. The Education Park is the only area in China where foreign education providers can establish independent TNE operations without having to partner with local institutions.

The establishment of the Education Park was also informed by the national strategy of leveraging international education in China to help develop the skills and talents the country needs for the future and help retain national talent in China. The Education Park is seen critical to the creation of the brand 'Study Hainan – Study Abroad', with a view to offering Chinese students the possibility to study 'abroad' by studying in Hainan.

The total planned area of the Education Park covers 350 hectares. Currently, in its first phase of development, the Park covers 12 hectares, hosting national universities offering a range of joint programmes in partnership with different international universities. These partnerships arrangements include:

- *University of Electronic Science and Technology of China (China) & University of Glasgow (UK), established in 2022*
- *Beijing University of Posts and Telecommunications (China) & Queen Mary University of London (UK), 2022*
- *Communication University of China (China) & Coventry University (UK), 2022*
- *Beijing Sport University (China) & University of Alberta (Canada), 2023*

Student numbers are near to reaching the phase 1 target of 10,000 and phase 2 has a target of 30,000 students. Most of the students are from mainland China, however, providers operating in the Education Park are allowed to recruit between 10 to 20 per cent of international students. There are plans to increase and facilitate the recruitment of international students to Hainan in the future. Already there are some favourable visa policies for international students considering studying in the Hainan Education Park. There are also more favourable visa policies for teaching staff. It is expected that students will be able to select courses from multiple universities and obtain multiple degrees from the universities operating in the Education Park.

Investment for opening campuses in the Education Park is provided by the government. Government funding and support is facilitated by partnering with Chinese universities. The Education Park adopts an operating model of 'general sharing and independent colleges', consisting of the government providing a range of shared facilities, including student accommodation and student services, teaching building, and sports facilities, whilst education providers retain their academic independence. The government also provides research funding, as well as student support and scholarships. Other incentives include lower taxation and the possibility of recruiting students with lower gaokao scores.

One of the key challenges facing Education Park in its early stages of development is strengthening its relationship with industries, which is seen as key to attracting more high-quality students to Hainan with good prospects of employment after graduation. Attracting more industry to Hainan is therefore seen as important to the success of the Education Park. This is what the Hainan Free Trade Port intends to achieve through the other 10 sector-specific free trade parks on the Island. The Education Park is in turn seen as a key catalyst for industrial growth and innovation.

5.2 International education hubs

5.2.1 A Comparative Overview

As illustrated in the previous section, international education hubs can have different characteristics and modes of operation. These differences depend primarily on the primary purpose of their establishment, the type of ownership, the regulatory-operating framework, and financial arrangements. Table 5 sums up some key features of the hubs taken into consideration.



Table 5: Main types of education hubs

Hub	Rationale	Ownership	Regulation	Financials
Education City Qatar (first HEI 1999) - Qatar	Support national economic growth (meeting skills needs and attracting international talent) Support transition into a knowledge-based society	Private with public funding (Qatar Foundation)	<u>Delivery models</u> : Branch campus. Multiversity approach encouraged through credit transfer <u>Approval</u> : highly selective / generally by invitation <u>HE regulation</u> : relying on sending country's accreditation / national accreditation will be required once in place <u>Broader regulation</u> : National legislation apply	Provide all teaching facilities, pay salary of staff Provide central student housing, shared student facilities, manage financial aid Shared teaching and learning spaces Student fees go to QF
Knowledge Park (2003) & International Academic City (2005) - Dubai, UAE	Support economic diversion / transition to knowledge economy Cater for expats and new companies coming in	Private though public investment (TECOM)	<u>Delivery models</u> : Branch campus and teaching centre <u>Approval</u> : Open to proposals, but increasingly alignment with economic priorities considered <u>HE regulation</u> : Free zones are exempted from national regulation. Approval and accreditation by local regulator required National accreditation required for qualification recognition <u>Broader regulation</u> : As a Free Zone there are less barriers to trade	Provide infrastructures for rent or 'build and lease'. Provide some shared building / facilities There are shared commercial facilities such as student housing, food halls Student fees go to providers
EduCity Iskandar (2008) - Malaysia	Spur the economic growth of Iskandar Puteri Support urbanisation	Private though public investment (Iskandar Investment)	<u>Delivery models</u> : Branch campus <u>Approval</u> : Open to proposals <u>HE regulation</u> : National accreditation required <u>Broader regulation</u> : National legislation apply	Provide premises through 'build and lease' or rental Provide central student housing, leisure activities, student services Provide paid-for support, such as marketing, accreditation, engagement with industry Student fees go to providers
Ras Al Khaimah Academic Zone (2008) - RAK, UAE	Cater for expats and new companies coming in Support local economic growth	Government (Economic Zone Authority)	<u>Delivery models</u> : Branch campus and teaching centre model <u>Approval</u> : Open to proposals <u>HE regulation</u> : Free zones are exempted from national regulation. Approval and accreditation by local regulator required National accreditation required for qualification recognition <u>Broader regulation</u> : As a Free Zone there are less barriers to trade	Provide infrastructures for rent or 'build and lease'. Rent is subsidised for initial years Hub provides a one stop shop offering support Some minimum shared facilities, e.g. student housing Student fees go to providers
Incheon Global Campus (2012) - South Korea	Support economic development Help addressing national brain drain Cater for expats and new companies coming in	Government (Incheon Free Trade Foundation)	<u>Delivery models</u> : Branch campus. One year required at the home campus <u>Approval</u> : Open to proposals, but selective process to ensure that national priorities are met <u>HE regulation</u> : Require national accreditation, although lighter touch as relying on sending country accreditation <u>Broader regulation</u> : As a Free Zone there are less barriers to trade	Provide infrastructures, free rental to start with Provide shared facilities, student housing, student services, library Student fees go to providers

Hub	Rationale	Ownership	Regulation	Financials
Uniciti International Education Hub (2013) - Mauritius	Develop a smart city Supporting national economic growth (meeting skills needs and attracting international talent)	Private (Medine Group)	<u>Delivery models</u> : Different models allowed (branch campus, franchise, co-delivery, rental) <u>Approval</u> : open to proposals, strategic national/local priorities taken into account <u>HE regulation</u> : National accreditation required <u>Broader regulation</u> : National legislation apply	Provide premises through 'build and lease' or 'cost-sharing' or for rental. Provide paid-for support, such as marketing, accreditation, campus experience, student visa Provide central student housing and leisure activities Student fees go to providers, some to the hubs depending on delivery model
Hainan Li'an International Education Park (2020) - China	Support local economic growth Help addressing national brain drain	Government (Hainan Government)	<u>Delivery models</u> : as in rest of china branch campus, joint institutes or joint programmes by also only area in China where fully foreign owned branch campus model is allowed <u>Approval</u> : Open to proposals, but selective process to ensure local and national priorities are met <u>HE regulation</u> : Require national accreditation <u>Broader regulation</u> : As a Free Zone there are less barriers to trade, e.g. taxation lower + more supportive student and staff visa	Provide infrastructures, free rental to start with Provide shared facilities, student housing, student services, and library. Some services are charged to institutions based on student number size Provide student funding, and research funding Student fees go to providers

As the table above illustrates, there can be different rationales for establishing international education hubs. Generally, they all have an underpinning core rationale to help boost the local or national economy by attracting international investment in the form of international students and/or international expertise to support national capacity development. There can also be additional underlying motivations depending on the broader socio-economic context, such as catering for expat communities; this is especially the case for hubs developed within free trade zones attracting multinational companies (such as Dubai, RAK, and Incheon), supporting urbanisation plans, in particular related to green-field projects (such as Iskandar, Mauritius, and Qatar); and helping mitigating 'brain-drain', principally for traditionally sending countries of international students (such as Hainan, Iskandar, and Incheon).

The ownership and source of funding for hub initiatives can also vary. Some, like RAK Academic Zone, Hainan International Education Zone and Incheon Global Campus, are wholly owned and financed by Governments (through a combination of central and local government funding). Others are owned and funded by investment companies financed by governments, such as TECOM in Dubai and Iskandar Investment in Malaysia. Others are fully owned by private entities such as the Medine Group in Mauritius and the Qatar Foundation in Qatar. However, whilst Uniciti

International Education Hub is exclusively funded by the Medine Group, the Qatar Foundation Education City is significantly supported by public funding.

Other private investors can play an essential role in helping foreign providers establish operations, especially in education hubs where the education hub itself does not cover the set-up costs. The extent to which foreign providers are supported and incentivised to operate in the different hubs can vary significantly. Typically, more generous incentives and support are associated with hubs supported by public funding, such as in the cases of Education City in Qatar, the Hainan International Education Zone and Incheon Global Campus. In these cases, the hubs fully provide and finance the teaching facilities with different favourable financial arrangements, such as free rental for the initial years of establishment or subsidised rental fees, such as in the RAK Academic Zone.

Generally, all hubs, although to different extents, provide some shared facilities, such as student housing, student services and leisure activities, libraries, food halls, etc.... to be paid directly by students or, at times, paid directly by providers depending on the number of students they have. Different hubs provide additional services to providers based on different commercial arrangements, such as support with marketing and recruitment, student or staff visas, engagement with industry, or obtaining the

required licences to operate and academic accreditation. Some hubs or local and national governments might also provide scholarships for national and international students to support their studies with providers operating in the hubs.

Hubs operating within free trade zones generally have more favourable regulations, not only with regard to trade-related aspects, such as taxation but also in relation to academic regulations. In the UAE, foreign providers operating in the free trade zones of Dubai and Ras al Khaimah are exempted from federal-level accreditation and have established their academic regulatory bodies, which are generally less prescriptive. The Hainan International Education Zone is the only place in China where foreign providers can fully own their branch campus. Whilst foreign providers operating within the Incheon Global Campus must undergo accreditation by the national accreditation authority, this is a simplified and lighter touch than the accreditation process for Korean universities.

The accepted delivery models might also vary. The branch campus model is the most common and predominant model accepted by all hubs. Some hubs accept different delivery models, such as smaller teaching centres or franchise arrangements with local providers. Unciti International Education Hub can deliver education programmes directly on behalf of foreign providers by utilising their pool of local lecturers. EduCity Iskandar established at one point its own EduCity College to offer franchised programmes. However, they have stopped offering this possibility as it was seen to compete with providers operating in the hub. Education City in Qatar is the only hub proactively encouraging a multiversity model whereby students can take courses offered by different providers in the hub and have these recognised for their degrees. Hainan International Education Zone also intends to encourage this multiversity model as it develops further.

Different hubs attract foreign providers from prominent sending countries due to different geopolitical and historical connections. For example, Unciti International Education Hub in Mauritius hosts primarily providers from France, the UK, and India, EduCity in Malaysia has so far attracted providers from the UK and Singapore, whilst Education City in Qatar and Incheon Global Campus have primarily sourced their foreign provision from the US. The hubs with a wider diversity of sending countries are those of Dubai and Ras Al Khaimah. However, we can still observe a predominance of traditional TNE-sending countries such as the UK, the US, and Australia.

Finally, another differentiating feature is the process through which foreign providers are attracted to operate in the hub. This can be more or less selective and more or less driven by the hub. Generally, it is possible to observe that the higher the government investment, the more selective and centrally driven the process for attracting and approving providers operating in the hub. Qatar

Foundation Education City is arguably the most selective, with foreign providers having been proactively invited to operate in the hub according to the country's identified skills and education needs. Incheon Global Campus is also highly selective, with a particular preference for highly ranked and research-intensive universities.

Hubs of a more commercial nature, such as EduCity in Iskandar and Educiti International Education Hub in Mauritius, are generally more market-driven and open to proposals. However, consideration is also given to the general fit of foreign providers and their planned provision to local education and training needs and priorities. The hubs in Dubai are also very much market-driven and open to external proposals. However, the presence of a regulator such as the Knowledge and Human Development Authority does provide a layer of scrutiny to establish the fit of the proposed provision to the Emirate's strategic priorities.

The above comparative considerations do not point to a single model as the best possible model for establishing and operating an international education hub. Different operating models can have their advantages and value depending on several considerations, particularly the main rationale underlying the establishment of a hub and the broader operating socio-economic and regulatory context. Based on the above comparative overview and conversations that the research team has had with representatives of the different hubs and with some TNE providers with experience operating in education hubs, it is possible to formulate a range of recommendations about the key aspects to consider in developing a successful international education hub.

- Set out a clear rationale for the hub. From the beginning, it is critical to clearly outline the goals for establishing an international education hub, as these might require different strategies and solutions. For example, is it about helping a region's local economic development and urbanisation? Is it about increasing the attractiveness of Viet Nam to international students? Is it about retaining Viet Nam talents in Viet Nam? It can, of course, be all of these and additional goals, but it is important to set them out clearly from the start.
- Understand the motivations and needs of all key stakeholders: It is critical to have a clear understanding of the motivations and needs of all key stakeholders on which the successful realisation of an international education hub depends. For example, what would motivate TNE providers to establish operations in the hub, and what would they need to be encouraged to make this decision? What about the needs and motivations of students (either international or national/regional or both)? Other key stakeholders to consider are investors, who can play a crucial role in particularly where there is limited government investment and the local communities or

local/national industry that can inform the choice of TNE provision capable of meeting existing demand for training and skills.

- Develop an attractive environment for TNE providers and students: Based on the rationale for establishing the hubs and the analysis of stakeholders' needs and priorities, it is critical to ensure that the international education hub offers sufficient incentives to attract foreign providers and students, that is supply and demand, in a sustainable way. Factors to consider are:
 - *Set up costs*: who will cover the set-up costs? Will there be government support/subsidies? Are there private investors available to support initial investments? To attract foreign providers, it is important to find ways to lower the financial risk/burden for initial setup, reducing the time for returns on investment.
 - *Ecosystem*: Is the hub's location embedded in an ecosystem of demand for skills and training, including, for example, K-12 education and local industries and companies? Is there a local demand for education and training from students and employers?
 - *Student experience*: how attractive is the local environment for national or international students? Factors to consider are the availability of quality student accommodation, transport to and from the

campus, leisure activity and food options, and the quality of teaching and learning facilities and work opportunities.

- *Student finance*: are the scholarships available to attract national and international students? This might be particularly important for hubs located in areas without a natural demand for education and training.
- *Student and work visa*: how easy and attractive is the visa system for international students and staff? Will students be able to work during their studies or after graduation? How long would foreign teaching staff be able to stay in the country or hub for?
- *Academic regulation*: is there a clear process for foreign providers to obtain a licence to operate and the required academic accreditation to deliver their planned programmes of study? How burdensome is that process, and is there scope to lessen the academic regulatory burden for foreign providers operating in the hubs?

These are some main aspects to consider when developing an international education hub. They will inform, and/or will be informed by, the location selection for establishing the hub. The less a hub is connected to transport, accommodation, amenities and leisure activities, the more investment it will require to attract student demand.

6 Considerations for international engagement

6.1 Recommendations regarding the promotion of international student mobility

This section focuses on areas that can strengthen international student exchange and mobility between Vietnamese HEIs and overseas Institutions.

International Student Mobility is increasingly becoming a key component in the operations of HEIs worldwide, including those in Viet Nam. Attracting international students offers numerous direct and indirect benefits to HEIs and the host countries.

An ambitious international education strategy with well-formulated objectives and targets is required to successfully signal Viet Nam's welcome to international students. This approach requires all-government support.

Our research shows that favourable student and academic visas are required to make the country internationally competitive. A dedicated unit is tasked with promoting and

monitoring Viet Nam's internationalisation endeavours and progressing towards achieving the international strategy targets.

To achieve this, a robust data infrastructure is required. HEMIS (Higher Education Management Information System) currently fulfils this function.⁴ Until systematic data collection is implemented, annual surveys can collect the required information. However, this is temporary until the required data infrastructure is implemented. This research established a significant gap between the information reports through HEMIS and the actual numbers of international students in Viet Nam. This gap signals the need for reliable student data collection systems at the institutional and national levels.

The table below summarises recommendations for the Government, MOET, local People's Committees, and regulatory bodies on attracting international students to Viet Nam.

⁴ <http://hemis.moet.gov.vn/>

Table 6: Main considerations by stakeholder groups

Item	Recommendations	HEIs	Government and Other Regulatory Agencies	Ministry of Education and Training	Local People's Committees
1	Develop international strategies with well-formulated and measurable objectives and targets for international cooperation, student exchange and international student mobility	x	x	x	x
2	Establish a specialised unit for international student recruitment and support	x		x	x
3	Participate in associations and alliances related to higher education and international student mobility	x		x	
4	Offer academic programmes in foreign languages, particularly with English as the language of instruction	x	x	x	
5	Engage in international quality assessment and accreditation processes	x		x	
6	Integrate local and regional elements into both curricular and extracurricular programmes for international students	x		x	x
7	Establish international education hubs		x	x	x
8	Provide dedicated infrastructure for international students	x	x	x	
9	Create more open and supportive visa policies and regulations for international students and faculty		x		
10	Develop scholarships and bursaries towards tuition and living expenses of international students	x	x	x	x
11	Implement preferential policies for infrastructure and transportation to support the development of designated hub areas		x		x

6.2 Considerations for HEIs

- **International students must be recognised as integral to the overall student body.** HEIs should formulate detailed plans to attract international students, which should be quantified annually into specific Key Performance Indicators (KPIs). KPIs should cover annual targets and targets for individual programmes, regions, or countries sending students. They can also distinguish between short-term and long-term international student mobility. Beyond recruitment figures, KPIs should also reflect international students' outcomes, assessments, and experiences during and after students' studies.
- **HEIs should establish a dedicated office/department responsible for internationalisation.** This department should have operational independence and resources separate from general administrative offices (e.g., academic affairs, international cooperation) if feasible. Ideally, it should operate as an autonomous service unit with its own financial and legal identity (e.g., a company or centre model) to enhance autonomy, creativity,

and accountability in its operations. This department should issue clear policies and procedures concerning international recruitment, support, and care from pre-arrival, during, and post-study in Viet Nam. The unit should also maintain English-language websites and other communication tools, such as social media, to promote the institution to potential international students and partners. Additionally, the department must assist international students with visa procedures, accommodation, cultural exchange, and other logistical matters throughout their stay in Viet Nam.

- To improve international student recruitment, **HEIs may consider joining higher education alliances**, such as the University Mobility in Asia and the Pacific (UMAP) and international student mobility-promoting associations like the European Association for International Education (EAIE) and the Association of International Educators (NAFSA). Such memberships help reduce advertising and operational costs while saving time, effort, and resources. Furthermore, cooperation with education agents can also enhance international recruitment efforts.

- **At the national level, specialist membership organisations and agencies can be created** to give the respective HEIs a collective voice on internationalisation and support staff training needs. Examples from the UK include the British Universities International Liaison Association (BUILA), a 'membership-led organisation, supporting the work and professional interests of HE staff working on the international agenda' ⁵. Another example is the UK Council for International Student Affairs ⁶, which directly engages and advises international students and supports HEIs' staff with up-to-date information about student immigration rules, international students' well-being, and finance.
- **Offering foreign-language programmes**, particularly those using English as the medium of instruction, and employing international lecturers are critical factors in attracting international students, whether full-time or short-term students. Additionally, the accreditation of these programmes by recognised international agencies enhances their attractiveness to international students.
- **Integrating local Vietnamese and regional elements into academic and extracurricular programmes** is vital for improving international student experiences and improving international recruitment and retention success. For example, HEIs could provide additional facilities, such as prayer or meditation rooms and dormitories, reflecting the needs of diverse student groups. Certain international student groups may have specific requirements—some may require prayer or meditation rooms, whereas others may prefer private rooms.
- Low living and tuition costs are competitive advantages for Asian countries, including Viet Nam, compared to Western nations. **Offering reasonable tuition fees, affordable dormitory accommodation, scholarships, and part-time work or paid internships for international students** will be an essential competitive advantage for Vietnamese HEIs. Furthermore, implementing articulation programmes with foreign institutions, allowing international students to spend initial years in Viet Nam (2+1 or 3+1 models) and the remaining years at more advanced institutions abroad, will also be an appealing option for international students, allowing them to earn degrees from prestigious institutions while saving costs during their initial years.

6.3 Recommendations for the Government, Ministry of Education and Training (MOET), and Central and Local Authorities

- At the national level, like HEIs, international students should be considered an integral part of the national higher education community. A specific strategy to attract international students should be developed

and aligned with the overall strategy for the national higher education system. The national, international student recruitment plan should also be quantified with specific targets, including long-term and short-term mobility and sending countries.

- **A dedicated national body** should support HEIs in recruiting international students and in partnership-building with domestic and international stakeholders. This body should also develop a centralised information portal for international students in Viet Nam (e.g., a 'Study in Viet Nam' website, similar to 'Study in Malaysia', 'Study in Taiwan', or 'Study UK'). This website would provide official information about institutions, programmes, scholarships, visa procedures, and practical advice for international students on living, travelling, and engaging in cultural activities in Viet Nam. The body should make recommendations to MOET, provide guidelines to the HE sector, and provide best practices for international student support. It should also publish resources (online and offline) and organise training sessions for international student support staff.
- The government and MOET **can proactively guide domestic HEIs in international alliances**. This demonstrates leadership in promoting international student mobility while facilitating the management of international student activities.
- At the governmental level, a concerted effort should be made towards **credit and international degree recognition, quality assurance, accreditation, and information management** can be resolved more efficiently.
- **The government and MOET should develop policies and financial support mechanisms to encourage HEIs to offer foreign-language programmes**, particularly those taught in English. Viet Nam has already implemented such a national programme from 2008 to 2015. Promoting these programmes will undoubtedly assist HEIs in attracting more degree-seeking international students in the long term.
- A national curriculum that includes subjects related to Vietnamese history, culture, and people (e.g., Vietnamese Studies) is recommended. **Degree-level international students could be required to take subjects related to Vietnamese culture and heritage that aim to strengthen people-to-people relations** instead of the general education courses that Vietnamese students must complete (such as those on ideology and politics).
- Introducing flexible visa policies for international students is another effective measure to promote international student recruitment. **Authorities should consider issuing student visas for the entire study period, minimising administrative**

⁵ <https://www.buila.ac.uk/about>

⁶ <https://ukcisa.org.uk/>

burdens. Additionally, allowing international students to stay (typically, this is two years⁷) post-graduation to work would help retain talented graduates. Clear international student work rights regulations would enhance Viet Nam's appeal, especially for students from less developed countries.

Liberal visa policies for international faculty are vital for attracting international students. For example, academic and research visa durations could align with employment contracts, and international faculty could be allowed to sponsor family members during their stay in Viet Nam.

- **The government should establish national or local scholarship schemes to attract international talent to Viet Nam and encourage student exchanges.** Prioritising infrastructure and transportation projects that support HEIs and international students is also essential. This includes HEI collectively developing dormitory spaces for their students with additional facilities and creating bus or metro routes directly serving HEIs, including express routes.
- Recognising TNE's role in attracting international students, **Viet Nam should consider developing an attractive policy environment for TNE**, underpinned by clear, robust, proportionate, and fit-for-purpose regulations that cover approval and regular monitoring.
- **Clear TNE regulation is essential to enable foreign providers to understand the expectations and requirements they must meet**, hence helping inform their due diligence. Consideration should be given in this context to provide clear guidance on implementing regulations and processes that TNE providers might need to go through to obtain approval or undergo regular monitoring.
- **Robust regulation and quality assurance processes underpin confidence** in the country's TNE provision. Lack of clear regulation or regulation aligned with international best practices might disincentivise TNE providers to consider Viet Nam as a delivery location for TNE delivery to avoid reputational risk. **Proportionate regulation is also critical to avoid over-burdening TNE providers** with unnecessary regulation that might disincentivise considering Viet Nam as a delivery location. Proportionate regulation should consider different TNE models, which might necessitate different approval requirements or the confidence that can be placed on the quality assurance oversight of TNE providers' country of origin.
- Fit-for-purpose regulation should consider the rationale for attracting TNE providers in the country

and Viet Nam's broader strategic objectives for establishing TNE provision in the country. **Adopting an outcome-oriented approach to regulation and quality assurance**, placing less emphasis on input requirements (such as level of investments, size of classrooms, and teachers-to-student ratio), can help develop fit-for-purpose regulation, enabling Viet Nam to achieve its ambitions as an international education hub.

- **Establishing international education zones** to attract foreign and domestic HEIs and research institutions is a practical approach to fostering international higher education and student recruitment. Close collaboration between central and local governments is necessary to plan and align these zones' visions, operational models, and investment strategies.

6.4 Education Hubs

Based on the above comparative overview, and conversations that the research team has had with representatives of the different hubs and with some TNE providers with experience of operating in education hubs, it is possible to formulate a range of recommendations about the key aspects to consider in developing a successful international education hub:

- **Set out a clear rationale for the hub:** it is critical to clearly outline from the beginning what are the goals to be achieved with the establishment of an international education hub, as these might require different operational strategies and solutions. Is it, for example, about helping the local economic development and urbanisation of a particular region? Is it about increasing the attractiveness of Viet Nam to international students? Is it about retaining Viet Nam talents in Viet Nam? Is it about facilitating knowledge transfer and knowledge creation? It can of course be all of these and additional goals, but it is important to set them out clearly from the start, as their realisation will require different initiatives and operational models.
- **Understand the motivations and needs of all key different stakeholders:** it is essential to have a clear understanding of the motivations and needs of all key stakeholders upon which the successful realisation of an international education hub depends. For example, what would motivate TNE providers to decide to establish operations in the hub, and what would they need to be encouraged to make this decision? What about the needs and motivations of students (either international or national/regional or both)? Other key stakeholders to consider are investors, who can play a key role in particular where there is limited government investment, and the local communities or local/national industry that can inform the choice of TNE provision capable of meeting existing demand for training and skills.

- **Develop an attractive environment for TNE providers and students:** Based on the rationale for establishing the hubs and the analysis of stakeholders' needs and priorities, it is critical to ensure that the international education hub offers sufficient incentives to attract foreign providers and students, that is supply and demand, in a sustainable way. Factors to consider are:

- *Set up costs:* who will cover the set-up costs? Will there be government support/subsidies? Are there private investors available to support initial investments? In order to attract foreign providers, it is important to find ways to lower the financial risk and burden for initial setup, reducing the time for returns on investment.
- *Ecosystem:* is the location of the hub embedded in an ecosystem of demand for skills and training, including for example K-12 and local industries and companies? Is there a local demand for education and training by students and employers?
- *Student experience:* how attractive is the local environment for local or international students? Factors to consider are the availability of quality student accommodation, transport to and from the campus, leisure activity and food options, and the quality of teaching and learning facilities and work opportunities.
- *Student finance:* are there scholarships available to attract national and international students? This might be particularly important for hubs in areas without a natural demand for education and training.
- *Student and work visa:* how easy and attractive is the visa system for international students and staff? Will students be able to work during their studies or after graduation? How long would foreign teaching staff be able to stay in the country or hub?
- *Academic regulation:* is there a clear process for foreign providers to obtain a licence to operate and the required academic accreditation to deliver their planned programmes of study? How burdensome is that process, and is there scope to lessen the academic regulatory burden for foreign providers operating in the hubs?

These are some main aspects to consider when developing an international education hub. They will inform the location selection for establishing the hub. For example, the less a hub is integrated into a natural ecosystem of demand for training and skills, and the less connected it is with services such as transport, accommodation, amenities and leisure activities, the more investment it will require to attract initial demand and supply and eventually to develop the required ecosystem and levels of connectedness and urbanisation necessary

for the development of sustainable education hubs.

In this context, based on the lessons learned from previous attempts to develop education hubs in Viet Nam, it is possible to draw specific recommendations to inform the planning and implementation of international education hubs in the country.

- **Strategic planning and coordination:** Drawing on the lessons learned from Viet Nam attempts over the past two decades, it is recommended that careful consideration is given to the number of planned international education hub projects to ensure effective execution and avoid scattered investments. This decision should also include the most suitable locations for international education hubs, understanding the implications associated with planning hubs near large cities or far from urban centres.
- **Ownership and investment mechanisms:** It is essential to clearly define the ownership mechanisms (state or private) and investment forms (state investment, private investment, or public-private partnerships) for the dedicated hub(s). This will assure investors and international education institutions of long-term investment and operation. Limited investment funding (either public or private) has been a key factor in the delayed or unsuccessful establishment of education hubs in Viet Nam in the past.
- **Scope of education provision:** The scope of education offering within the international education hub needs to be clearly defined, establishing whether to target exclusively higher education provision or also aiming to attract vocational education, secondary schools, or research-oriented institutions. The scope will be generally drawn from and informed by the driving rationale for establishing the hub.
- **Infrastructures:** Bureaucratic obstacles affecting infrastructure development, such as delays in land clearance and acquisition and slow infrastructure development, have hindered the successful establishment of education hubs. The lack of urban infrastructure, such as transport or integration with local community services, creates significant operational barriers to HEIs. Restrictive infrastructural requirements, such as the 9m² per student requirement, can also represent significant obstacles to establishing TNE operations in Viet Nam. A survey of 226 HEIs shows that 68 per cent of them (153 HEIs) are below the requirement of 9m² per student⁸. This contrasts with the requirement for local HEIs, where only 2.8m² per student is required.⁹
- **Socio-economic integration:** Integration between the newly constructed educational infrastructure and the surrounding socio-economic environment is critical. Building educational facilities without

⁸ See Ranking of the top 100 Vietnamese Universities in 2024 <https://vnur.vn/>

⁹ See Circular 01/2024 by MOET.

adequately considering the socio-economic connections with local communities can result in educational zones that are isolated from the economic activities and services students and faculty need.

- **Set-up financial viability:** High investment requirements, such as the requirement for a minimum investment of 1,000 billion VND (approximately US\$40 million) for a new university or 500 billion VND (approximately US\$20 million) for a new branch campus, can discourage participation, making it difficult to attract high-quality institutions and investments, ultimately hindering the development and success of these zones. Consideration should be given to setting lower initial investment thresholds, allowing institutions to expand gradually as they generate revenue, better aligning with investor expectations and reducing financial risk.

6.5 Considerations for International Stakeholders

Previous research detailed a significant rise in intra-regional mobility in East and Southeast

Asia. This contributes to the slowdown in outbound mobility to the main English-speaking destination countries (Australia, UK, USA, Canada, New Zealand). The report concludes that intraregional student mobility will grow further in East Asia and ASEAN (British Council, n.d.).

Viet Nam's ambition to become an international student hub aligns with those of other regional governments. Vietnamese students have already chosen to study in other East Asian countries. Conversely, Viet Nam is already successfully attracting international students from the region, mainly from Laos and Cambodia. Still, with the right policy mix in place, the diversity of the student population is expected to grow.

Successful TNE in the country will widen the choice of high-quality programmes available locally to students likely to consider other regional destinations. Therefore, high-quality and locally relevant programmes are likely to secure the following benefits for international higher education providers:

- Access to intraregional mobility flows and international students already in Viet Nam (whose proportion is set to continue to grow).
- Engaging with emerging trends future proofs providers' international engagement – it is more cost-effective to benefit from naturally occurring trends than to try to reverse them (e.g. engaging in high-cost student recruitment from markets with shifting demand).

- Access a wider pool of Vietnamese students who would have considered study options in the wider East Asia region.
- Forging a strategic partnership with local universities with growing prominence in the region.
- Building strategic alliances in the region – leveraging local partnerships to access their networks in the region.
- Engaging cost-effectively and sustainably in a strategic region, which used to be the primary driver of international student demand.
- Ensuring the international HE sector continues to play a critical role in supporting Viet Nam's ambition to become a leading education hub in Southeast Asia through further strengthening UK-Viet Nam relationships in higher education.

Viet Nam is positioning itself as a new international education hub in Southeast Asia by fostering an environment conducive to attracting globally mobile students, high-quality education programmes, and investment.

Universities in Viet Nam are eager to partner with international institutions to co-create programmes, particularly in English-medium instruction, and establish joint research initiatives. By collaborating with Vietnamese universities, international partners can leverage Viet Nam's growing demand for higher education, its strategic push towards internationalisation, and its aim to become an education hub in Southeast Asia.

This report emphasises the government's strategic push to create international education zones to bolster international student mobility and widen the study options for its students. Key policy initiatives include infrastructure development, regulatory reforms, and international partnerships. International HEIs are favourably positioned to benefit from these developments and equally contribute to enhancing Viet Nam's global educational profile. These efforts align with Viet Nam's broader objectives of retaining local talent, attracting international students, and fostering educational innovation.



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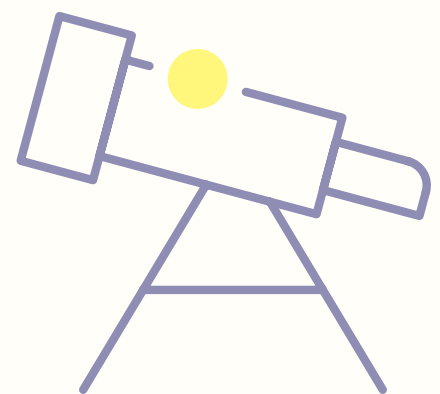
Appendix A

No	Province or city	Number of HEIs	No	Province or city	Number of HEIs
1	Hanoi	74	23	Phu Yen	2
2	Ho Chi Minh	46	24	Quang Nam	2
3	Da Nang	13	25	Quang Ngai	2
4	Thua Thien Hue	11	26	Quang Ninh	2
5	Thai Nguyen	9	27	Thai Binh	2
6	Nghe An	6	28	Thanh Hoa	2
7	Can Tho	5	29	Vinh Phuc	2
8	Binh Duong	5	30	An Giang	1
9	Bac Ninh	4	31	Bac Giang	1
10	Dong Nai	4	32	Bac Lieu	1
11	Hai Duong	4	33	Binh Thuan	1
12	Hai Phong	4	34	Dong Thap	1
13	Hung Yen	4	35	Ha Nam	1
14	Nam Dinh	4	36	Ha Tinh	1
15	Khanh Hoa	3	37	Hau Giang	1
16	Vinh Long	3	38	Kien Giang	1
17	Ba Ria – Vung Tau	2	39	Ninh Binh	1
18	Binh Dinh	2	40	Quang Binh	1
19	Dak Lak	2	41	Son La	1
20	Lam Dong	2	42	Tien Giang	1
21	Long An	2	43	Tra Vinh	1
22	Phu Tho	2	44	Tuyen Quang	1
Total					240

Appendix B

Appendix B1: List of representatives from international education hubs who participated in in-depth interviews

No	Names	Title and Affiliation	Name of hub	Country
1	Dr. Azizah Khalid Merican	Head of Education, Iskandar Investment Berhad (IIB) Group	EduCity Iskandar	Malaysia
2	Mr. Dhanjay Jhurry	Managing Director, Unicity International Education Hub	Unicity International Educational Hub	Mauritius
3	Dr. Eileen Luo Qing	Former President Assistant at the Administration Bureau of Hainan Free Trade Port (FTP)	Lingshui Li'an International Education Innovation Pilot Zone, FTP	China
4	Dr. Francisco Marmolejo	President of Higher Education at Qatar Foundation	Education City	Qatar
5	Dr. Nitesh Sughnani	Director of Higher Education at Dubai's Knowledge and Human Development Authority	Dubai Knowledge Park and Dubai International Academic City	United Arab Emirates
6	Mr. Taneer Topcu	Former Director of Ras Al Khaimah Academic Zone	Ras Al Khaimah Academic Zone	United Arab Emirates
7	Dr. Brian Yu	Vice President for Administration & External Relations at SUNY Korea (Former CEO of Incheon Global Campus)	Incheon Global Campus	Korea
8	Dr. Dongyeop Yeon	Director, Office of the President, at SUNY Korea	Incheon Global Campus	Korea



Appendix B2: List of stakeholders involved in inbound student mobility and TNE provision in Viet Nam who participated in in-depth interviews

No	Names	Title	Institution	Country
1	Neema Cucinotta	Director of Transnational Education Partnerships	Swinburne University	Australia
2	Neil Hart	Associate Director of Transnational Education (TNE)	De Montfort University	UK
3	Stephen Waterworth	Head of International Partnerships	Staffordshire University	UK
4	Associate Professor Lai Quoc Dat	Head of External Relations Office	Ho Chi Minh University of Technology, Vietnam National University	Viet Nam
5	Mr. Hoang Van Cuong	Managing Director, Saigon Business School	American Polytechnic College	Viet Nam
6	Ms. Vu Thu Huyen	Director of International Admissions, Saigon Business School	American Polytechnic College	Viet Nam
7	Ms. Mo (Lucy) Nguyen	Founder and Director	Abroaders (Enterprise providing internships, study tours, semester exchange, and service learning for international students to Viet Nam)	Viet Nam
8	Prof. Chris Jeffery	Pro-Vice Chancellor (International, Strategy & Engagement)	British University Viet Nam	Viet Nam
9	Ms. Hien Nguyen	Head of International Office	British University Viet Nam	Viet Nam
10	Mr. Lim Teng Leng	Director, International Relation	Temasek Polytechnic Singapore	Singapore
11	Ms. Nguyen Lan Anh	Director, Global Exchange Office	Duy Tan University	Viet Nam
12	Mr. Tran Duc Canh	Founder, Chairman	Saigon Institute of Higher Education Development (SIHED)	Viet Nam
13	Prof. Ly Tran	Professor in the School of Education	Deakin University	Australia

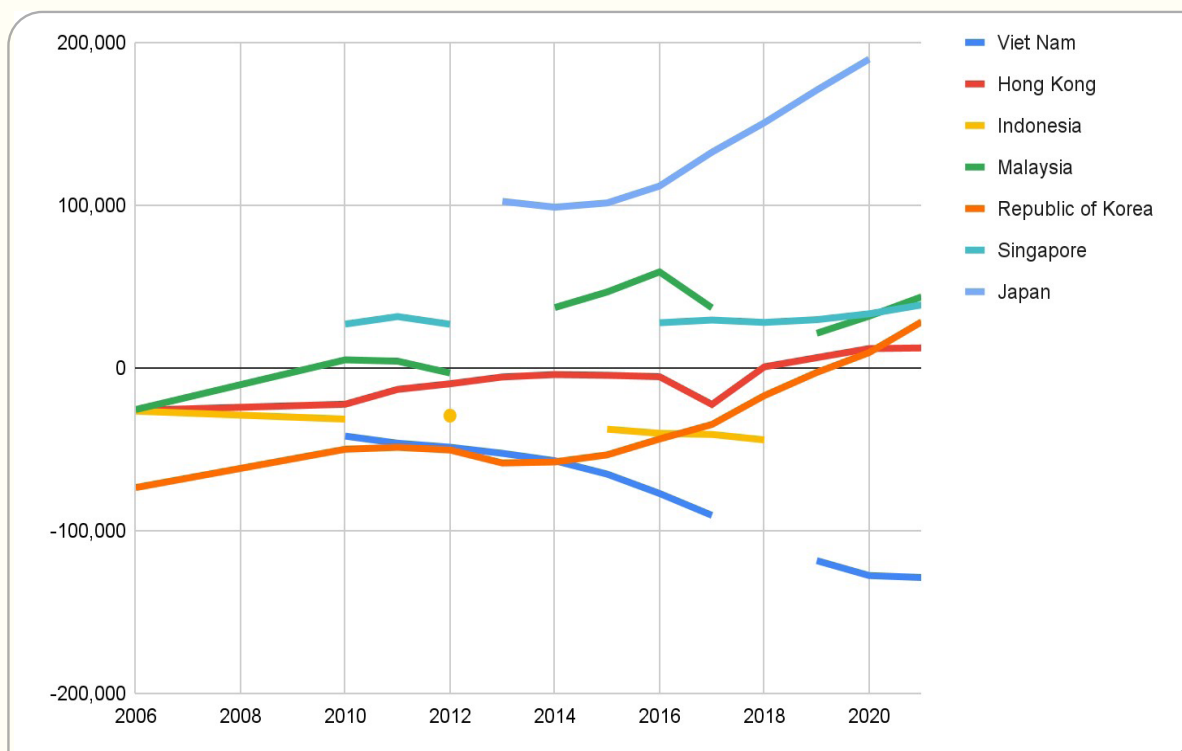
Appendix C

Appendix C1: Net flow of international students in some Asian countries (2006-2021)

	Flow of international students	2006	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Cambodia	Inbound	68	/	/	/	/	/	/	/	/	/	/	/	513
	Outbound	2496	4152	4249	4238	4445	5083	5288	5498	6034	6389	6995	7533	7401
	Netflow	-2,428	/	/	/	/	/	/	/	/	/	/	/	-6,888
Taiwan (ROC)	Inbound	/	45,413	57,920	66,961	79,730	93,645	111,340	116,875	/	129,000	128,000	91,000	95,000
	Outbound	/	/	32,000	/	/	/	/	/	40,000	/	/	/	/
	Netflow	/	/	25,920	/	/	/	/	/	/	/	/	/	/
Hong Kong	Inbound	4,905	10,325	17,959	21,100	26,731	30,013	31,955	32,004	34,348	37,297	42,641	47,301	46,933
	Outbound	30,897	32,557	31,082	30,768	32,213	34,020	36,410	37,322	36,585	36,559	36,271	35,360	34,591
	Netflow	-25,992	-22,232	-13,123	-9,668	-5,482	-4,007	-4,455	-5,318	-22,363	738	6,370	11,941	12,342
Indonesia	Inbound	4,730	6,437	/	7,235	/	/	7,305	7,653	7,763	7,677	/	/	/
	Outbound	31,182	37,813	37,368	36,483	39,449	39,554	44,850	47,755	48,550	51,820	56,708	60,098	59,224
	Netflow	-26,452	-31,376	/	-29,248	/	/	-37,545	-40,102	-40,787	-44,143	/	/	/
Laos	Inbound	174	725	786	588	317	543	315	451	472	495	468	543	/
	Outbound	2,904	3,802	4,108	4,355	4,836	3,388	3,529	6,290	5,103	6,615	8,291	9,237	8,368
	Netflow	-2,730	-3,077	-3,322	-3,767	-4,519	-2,845	-3,214	-5,839	-4,631	-6,120	-7,823	-8,694	/
Malaysia	Inbound	24,404	64,749	63,625	56,203	/	99,648	111,443	124,133	100,765	/	81,953	89,193	92,519
	Outbound	49,904	59,719	59,408	59,250	59,830	62,512	64,727	65,085	63,781	62,587	60,602	57,329	48,810
	Netflow	-25,500	5,030	4,217	-3,047	/	37,136	46,716	59,048	36,984	/	21,351	31,864	43,709
Philippines	Inbound	5,136	/	/	/	/	/	..	/	/	/	/	/	/
	Outbound	7,502	11,293	11,237	11,157	11,725	13,294	14,654	16,519	17,375	18,908	22,652	26,419	26,219
	Netflow	-2,366	/	/	/	/	/	/	/	/	/	/	/	/
Republic of Korea	Inbound	22,260	59,194	62,675	59,472	55,536	52,451	54,540	61,888	70,796	84,749	98,857	111,568	118,528
	Outbound	95,695	109,071	111,365	109,805	113,868	110,112	107,861	105,477	105,453	101,696	101,581	102,078	90,196
	Netflow	-73,435	-49,877	-48,690	-50,333	-58,332	-57,661	-53,321	-43,589	-34,657	-16,947	-2,724	9,490	28,332
Singapore	Inbound	/	47,915	52,959	48,938	/	/	/	53,122	53,204	51,756	53,030	54,982	58,269
	Outbound	18,982	20,924	21,351	22,041	22,863	23,540	24,763	25,293	23,720	23,730	23,326	21,663	19,508
	Netflow	/	26,991	31,608	26,897	/	/	/	27,829	29,484	28,026	29,704	33,319	38,761
Thailand	Inbound	5,601	19,052	20,155	20,309	/	/	/	31,571	/	/	/	25,086	/
	Outbound	25,055	26,764	26,126	26,055	26,101	26,816	29,660	30,773	32,334	33,376	33,295	32,935	28,609
	Netflow	-19,454	-7,712	-5,971	-5,746	798	/	/	/	-7,849	/
Viet Nam	Inbound	/	3,260	3,717	3,996	3,608	2,540	2,874	5,624	4,162	/	7,250	8,646	8,370
	Outbound	24,133	45,060	49,887	52,651	55,994	59,471	68,035	82,672	94,642	108,341	125,547	136,101	137,022
	Netflow	/	-41,800	-46,170	-48,655	-52,386	-56,931	-65,161	-77,048	-90,480	/	-118,297	-127,455	-128,652
Japan	Inbound	/	/	/	/	135,803	132,685	131,980	143,457	164,338	182,748	202,907	222,661	216,241
	Outbound	59,686	43,875	40,069	36,062	33,430	33,887	30,560	31,656	31,744	32,071	32,183	32,908	29,385
	Netflow	/	/	/	/	102,373	98,798	101,420	111,801	132,594	150,677	170,724	189,753	..
China	Inbound	36,386	71,673	79,638	88,979	96,409	108,217	123,127	137,527	157,108	178,271	201,177	225,100	221,653
	Outbound	389,861	606,528	652,712	685,501	718,995	769,931	818,577	866,812	928,338	997,618	1,059,984	1,095,780	1,021,303
	Netflow	-353,475	-534,855	-573,074	-596,522	-622,586	-661,714	-695,450	-729,285	-771,230	-819,347	-858,807	-870,680	-799,650

Source: UIS data

Appendix C2: Net flow of internationally mobile students in some East and Southeast Asian Countries (2010-2021)



Appendix D: Descriptive result of a survey with 123 HEIs in Viet Nam

Appendix D1: Profile of the surveyed 123 HEIs

Frequency		Percentage
Total number of respondents	123	
Public HEIs	91	73.98%
Private HEIs	29	23.58%
International HEIs	3	2.44%
HEIs in North Vietnam	73	59.35%
HEIs in Central Vietnam	12	9.76%
HEIs in South Vietnam	38	30.89%

Appendix D2: Number of long-term and short-term international students at 123 HEIs in Viet Nam, 2019-2024

Number of international students	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
Long-term international students					
Total	4,872	4,470	4,382	4,580	5,300
Average	39.61	36.34	35.63	37.24	43.09
Standard Deviation	104.79	91.80	84.43	83.02	104.82
Max Value	850	557	467	475	717
Min Value	1	1	1	1	1
Short-term international students					
Total	2,789	1,482	1,885	3,211	4,040
Average	22.67	12.05	15.71	26.11	32.85
Standard Deviation	76.40	50.26	73.82	106.90	121.50
Max Value	700	357	589	871	991
Min Value	1	1	1	1	1

Appendix D3: Vietnamese students studying abroad at 123 HEIs in Viet Nam, 2019-2024

Vietnamese students	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
Total	1,994	2,039	1,717	2,818	3,564
Average	16.21	16.58	13.96	22.91	28.98
Standard Deviation	64.50	138.23	102.22	96.53	93.55
Max Value	620	1,461	1,102	969	750
Min Value	1	1	1	1	1

Appendix D4: Top 10 nationalities of long-term international students at 123 HEIs in Viet Nam, 2019-2024

		Total number of long-term international students						Average number of long-term international students per institution					
Ranking	Nationalities	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	Average 2019-2024	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	Average 2019-2024
1	Laos	2,172	1,979	1,852	1,744	2,200	1,989.40	18.10	16.49	15.43	14.53	16.58	16.23
2	South Korea	709	849	596	573	458	637.00	5.91	7.08	4.97	4.78	5.31	5.61
3	Cambodia	295	259	261	350	276	288.20	2.46	2.16	2.18	2.92	2.40	2.42
4	China	140	183	269	379	419	278.00	1.17	1.53	2.24	3.16	2.32	2.08
5	Singapore	0	0	0	114	1,002	223.20	0.00	0.00	0.00	0.95	1.86	0.56
6	France	121	43	29	237	305	147.00	1.01	0.36	0.24	1.98	1.23	0.96
7	Philippines	43	65	74	202	119	100.60	0.36	0.54	0.62	1.68	0.84	0.81
8	Japan	83	29	34	101	159	81.20	0.69	0.24	0.28	0.84	0.68	0.55
9	India	0	0	3	56	271	66.00	0.00	0.00	0.03	0.47	0.55	0.21
10	Taiwan	42	38	36	75	63	50.80	0.35	0.32	0.30	0.63	0.42	0.40

Appendix D5: Top 10 nationalities of short-term international students at 123 HEIs in Viet Nam, 2019-2024

		Total number of long-term international students						Average number of long-term international students per institution					
Ranking	Nationalities	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	Average 2019-2024	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	Average 2019-2024
1	Singapore	104	0	24	249	1,132	301.80	0.87	0.00	0.20	2.08	2.52	1.13
2	France	140	74	49	235	275	154.60	1.17	0.62	0.41	1.96	1.29	1.09
3	China	218	0	82	135	300	147.00	1.82	0.00	0.68	1.13	1.23	0.97
4	Korea	95	232	57	138	97	123.80	0.79	1.93	0.48	1.15	1.03	1.08
5	Laos	82	77	88	151	79	95.40	0.68	0.64	0.73	1.26	0.80	0.82
6	Japan	121	7	20	113	186	89.40	1.01	0.06	0.17	0.94	0.75	0.58
7	Sweden	61	42	113	41	57	62.80	0.51	0.35	0.94	0.34	0.52	0.53
8	Germany	49	81	36	69	60	59.00	0.41	0.68	0.30	0.58	0.49	0.49
9	US	76	18	0	33	109	47.20	0.63	0.15	0.00	0.28	0.39	0.29
10	UK	0	0	0	146	58	40.80	0.00	0.00	0.00	1.22	0.34	0.31

Appendix D6: Motivations for attracting international students at 123 HEIs in Viet Nam, 2024

Motivations in recruiting international students	1	2	3	4	5	Average score
Additional income	4	5	59	41	11	3.36
Improve academic quality	3	0	31	37	49	3.99
Increase ranking	3	0	32	39	46	3.92
Supply highly-qualified labor force for Vietnam	2	0	50	33	35	3.74
Strengthen partnerships with international institutions	3	0	25	26	66	4.18
Enhance cultural vlaues	3	0	24	30	63	4.16
Enhance the environment of internationality	3	0	26	27	64	4.15

Appendix D7: International faculty at 123 HEIs in Viet Nam, 2019-2024

International faculty	2019-2020	2020-2021	2020-2021	2022-2023	2023-2024
Total	706	515	711	980	1,063
Average	5.74	4.19	5.78	7.97	8.64
Standard Deviation	18.75	13.50	17.78	20.02	21.36
Max Value	141	125	147	158	177
Min Value	1	1	1	1	1

Appendix D8: Strategies and Policies for attracting international students at 123 HEIs in Viet Nam

Strategies/Policies		Number of HEIs (out of 120)
Goals	Having specific goals	78
Organization and procedure	Having a dedicated body administrating international students recruitment	84
	Having specific procedure in international students recruitment	63
Infrastructure	Classroom for international students	42
	Dormitory for international students	57
	Housing support for international students	50
Scholarships	Scholarships for international students	66
Medium of instruction	English as medium of instruction	23
Accreditation	Institution-level accreditation	19
	Program-level accreditation	48
Partnership	Partner with agent	27
	Join network or association	47
Academic	English-taught programs	65

Strategies/Policies		Average score
Partnership	Number of agent	0.73
	Number of network or association	0.91
Academic	Number of EMI	4.37
	Number of accredited programmes	3.57

Strategies/Policies		Average score
Partnership	Number of agent	0.73
	Number of network or association	0.91
Academic	Number of EMI	4.37
	Number of accredited programs	3.57

Appendix D9: Results of regression analysis of the relationships between universities' internationalisation strategies and international student outputs

	Poisson regression	Zero-inflated Poisson regression	Negative Binomial regression	Zero-inflated Negative Binomial regression	Poisson regression	Zero-inflated Poisson regression	Negative Binomial regression	Zero-inflated Negative Binomial regression
	Long term International student				Short term international student			
Having goal on international student recruitment	0.661***	0.818***	0.869	0.727	1.014***	0.920***	0.25	0.5
	-35.84	-43.66	-1.89	-1.77	-26.99	-24.45	-0.46	-0.94
Having specific procedure/regulation on international student recruitment	-0.0694***	-0.378***	0.0915	0.00342	1.638***	1.308***	1.729**	1.417*
	(-4.30)	(-24.62)	-0.18	-0.01	-37.79	-29.29	-2.79	-2.44
Having specific dormitory for international students	0.906***	0.815***	0.807	0.737*	0.633***	0.468***	-0.54	-0.375
	-57.07	-52.19	-1.9	-2	-32.82	-24.83	(-1.06)	(-0.82)
Scholarship for international students	0.180***	-0.157***	0.64	0.232	-0.301***	-0.407***	0.178	-0.119
	-12.29	(-10.96)	-1.41	-0.58	(-15.81)	(-20.93)	-0.35	(-0.26)
Having international institution-level accreditation	-0.589***	-0.244***	-0.93	-0.38	1.178***	1.763***	1.01	1.489*
	(-24.52)	(-11.48)	(-1.31)	(-0.70)	-49.74	-87.16	-1.39	-2.45

	Poisson regression	Zero-inflated Poisson regression	Negative Binomial regression	Zero-inflated Negative Binomial regression	Poisson regression	Zero-inflated Poisson regression	Negative Binomial regression	Zero-inflated Negative Binomial regression
	Long term International student				Short term international student			
Number of international faculty members	0.00524***	0.00431***	0.00534*	0.00405*	0.00276** *	0.000743***	0.00717	0.00464
	-103.45	-92.35	-2.07	-2.11	-46.36	-12.67	-1.06	-0.96
Number of EMI programmes	0.0167***			0.021	0.0334***		0.0292	
	-23.18		-0.83		-70.33		-0.85	
Constant	3.893***	4.651***	3.468***	4.166***	1.378***	2.607***	2.083***	2.671***
	-190.11	-225.2	-7.5	-9.11	-27.39	-54.27	-4.9	-5.89
inflate								
Number of EMI programmes		-0.0691		-12.12		-0.0465		-4.26
		(-1.69)		(-0.02)		(-1.68)		(-0.43)
Constant		-0.547*		-0.436		0.046		0.0109
		(-2.47)		(-1.34)		-0.22		-0.03
lnalpha			1.538***	1.013**			1.749***	1.271***
			-12	-6.58			-11.84	-6.55
Number of observations	120	120	120	120	120	120	120	120
t statistics in parentheses * p<0.05 ** p<0.01 *** p<0.001" ** p<0.01 *** p<0.001"								

Appendix E: International Student Survey Responses

Appendix E1: Gender of 149 international students in Viet Nam

	Frequency	Percentage
Male	86	57.72%
Female	62	41.61%
Non-binary	1	0.67%

Appendix E2: Nationalities of 149 international students in Viet Nam

No	Nationality	Frequency	Percentage
1	Laos	59	39.60%
2	Cambodia	22	14.77%
3	China	17	11.41%
4	Malaysia	10	6.71%
5	Philippines	8	5.37%
6	France	6	4.03%
7	Germany	6	4.03%
8	Nigeria	5	3.36%
9	Finland	2	1.34%
10	United States	2	1.34%
11	Czech Republic	2	1.34%
12	Italy	1	0.67%
13	Myanmar	1	0.67%
14	Bulgaria	1	0.67%
15	Japan	1	0.67%
16	Russia	1	0.67%
17	Australia	1	0.67%
18	Sweden	1	0.67%
19	Korea	1	0.67%
20	Spain	1	0.67%

Appendix E3: Host HEIs in Viet Nam of 149 international students

Host HEI in Vietnam	Frequency	Percentage
Trade Union University	24	16.11%
Hanoi University of Mining and Geology	17	11.41%
FPT University - Da Nang Campus	8	5.37%
Ho Chi Minh City University of Technology	11	7.38%
Hanoi University of Civil Engineering	21	14.09%
Foreign Trade university	15	10.07%
The University of Danang, University of Science and Education	35	23.49%
Ho Chi Minh City Open University	12	8.05%
Duy Tan University	1	0.67%
Hanoi University of Science and Technology	1	0.67%

Appendix E4: Major of 149 international students in Viet Nam

Major	Frequency	Percentage
Human Resource Management	17	11.41%
Engineer (Mining, Construction, Civil, Chemical, Mechanical)	37	24.83%
Business Administration, Accounting, Banking	28	18.79%
Vietnamese Language & Translation	29	19.46%
Others (English, Education, IT)	38	25.50%

Appendix E5: Financial status of 149 international students in Viet Nam

Financial Status	Frequency	Percentage
Self-funded	47	31.54%
Fully-funded	70	46.98%
Partially-funded	26	17.45%
Others	6	4.03%

Appendix E6: Language of instruction of 149 international students in Viet Nam

Language of Instruction	Frequency	Percentage
Vietnamese	98	65.77%
English	49	32.89%
others	2	1.34%

Appendix E7: Programme duration at host HEIs of 149 international students in Viet Nam

Programme duration	Frequency	Percentage
Less than 6 months	41	27.52%
6 month - 1 year	25	16.78%
1-2 years	19	12.75%
3-4 years	45	30.20%
others	19	12.75%

Appendix E8: Experience of 149 international students studying in Viet Nam

Dimension	Sub-dimension	Frequency					Percentage					Sub-dimension's Average	Standard Deviation	Dimension's Average
		Strongly disagree - 1	Disagree - 2	Neutral - 3	Agree - 4	Strongly agree - 5	Strongly disagree - 1	Disagree - 2	Neutral - 3	Agree - 4	Strongly agree - 5			
D1: Personal Improvement	D1.1: Experience a different culture while studying in Viet Nam	5	4	21	58	61	3.36%	2.68%	14.09%	38.93%	40.94%	4.11	0.97	4.04
	D1.2: Interested in learning Vietnamese after studying in Viet Nam	7	9	25	49	59	4.70%	6.04%	16.78%	32.89%	39.60%	3.97	1.11	
D2: Educational Quality	D2.1: Consider the quality of education in Viet Nam high	6	12	32	53	46	4.03%	8.05%	21.48%	35.57%	30.87%	3.81	1.08	3.83
	D2.2: Host institution in Viet Nam has high-profile instructors	7	9	30	53	50	4.70%	6.04%	20.13%	35.57%	33.56%	3.87	1.09	
	D2.3: Your host institution in Viet Nam offers internationally accredited programs	7	8	33	53	48	4.70%	5.37%	22.15%	35.57%	32.21%	3.85	1.08	
	D2.4: Your host institution in Viet Nam is ranked high in international rankings such as QS or Times Higher Education	6	7	55	43	38	4.03%	4.70%	36.91%	28.86%	25.50%	3.67	1.03	

Dimension	Sub-dimension	Frequency					Percentage					Sub-dimension's Average	Standard Deviation	Dimension's Average
		Strongly disagree - 1	Disagree - 2	Neutral - 3	Agree - 4	Strongly agree - 5	Strongly disagree - 1	Disagree - 2	Neutral - 3	Agree - 4	Strongly agree - 5			
	D2.5: Educational qualifications from your host institution in Viet Nam are recognized by your home institution(s)	9	6	33	49	52	6.04%	4.03%	22.15%	32.89%	34.90%	3.87	1.12	
	D2.6: Your host institution in Viet Nam offers a wide range of courses and programs for overseas students	6	9	31	53	50	4.03%	6.04%	20.81%	35.57%	33.56%	3.89	1.07	
D3: Living and learning environment	D3.1: Viet Nam has a comfortable climate	9	13	53	43	31	6.04%	8.72%	35.57%	28.86%	20.81%	3.50	1.10	3.72
	D3.2: Viet Nam is an exciting place to live	6	9	28	55	52	4.03%	6.04%	18.79%	36.91%	34.90%	3.95	1.07	
	D3.3: You travelled or plan to travel around Viet Nam and other countries in the Southeast Asian region while studying in Viet Nam	9	11	29	46	54	6.04%	7.38%	19.46%	30.87%	36.24%	3.84	1.17	
	D3.4: Language is a barrier when you study in Viet Nam	8	18	44	45	34	5.37%	12.08%	29.53%	30.20%	22.82%	3.53	1.13	
	D3.5: Viet Nam has a safe living environment (low	6	8	36	58	41	4.03%	5.37%	24.16%	38.93%	27.52%	3.81	1.03	

Dimension	Sub-dimension	Frequency					Percentage					Sub-dimension's Average	Standard Deviation	Dimension's Average
		Strongly disagree - 1	Disagree - 2	Neutral - 3	Agree - 4	Strongly agree - 5	Strongly disagree - 1	Disagree - 2	Neutral - 3	Agree - 4	Strongly agree - 5			
	crime rate, no racial discrimination, no conflicts, etc)													
D4: Cost	D4.1: The tuition fee of Vietnamese HEIs is relatively lower than those of institutions in your home country and/or other countries	16	15	58	38	22	10.74%	10.07%	38.93%	25.50%	14.77%	3.23	1.15	3.39
	D4.2: The cost of living in Viet Nam is relatively lower than in your home country and/or other countries	12	14	43	40	40	8.05%	9.40%	28.86%	26.85%	26.85%	3.55	1.21	
	D4.3: You can work during the course to support your study while you are in Viet Nam	23	11	44	45	26	15.44%	7.38%	29.53%	30.20%	17.45%	3.27	1.27	
	D4.4: Your host institution in Viet Nam offers scholarships for international students	12	12	41	40	44	8.05%	8.05%	27.52%	26.85%	29.53%	3.62	1.21	
	D4.5: Your institution in your home country offers a	19	14	38	49	29	12.75%	9.40%	25.50%	32.89%	19.46%	3.37	1.26	

Dimension	Sub-dimension	Frequency					Percentage					Sub-dimension's Average	Standard Deviation	Dimension's Average
		Strongly disagree - 1	Disagree - 2	Neutral - 3	Agree - 4	Strongly agree - 5	Strongly disagree - 1	Disagree - 2	Neutral - 3	Agree - 4	Strongly agree - 5			
	scholarship to study at a host institution in Viet Nam													
	D4.6: An external organization offers a scholarship to study at a host institution in Viet Nam	20	15	44	41	29	13.42%	10.07%	29.53%	27.52%	19.46%	3.30	1.27	
D5: Social links and geographic proximity	D5.1: Viet Nam has an established population of international students	8	10	42	51	38	5.37%	6.71%	28.19%	34.23%	25.50%	3.68	1.09	3.58
	D5.2: Viet Nam is close to your home country in proximity	24	10	26	47	42	16.11%	6.71%	17.45%	31.54%	28.19%	3.49	1.38	
D6: Institution's Image	D6.1: Your host institution in Viet Nam is well-known for its education quality	4	9	40	53	43	2.68%	6.04%	26.85%	35.57%	28.86%	3.82	1.00	3.72
	D6.2: Your host institution in Viet Nam is well-known for the expertise of its staff	5	6	40	59	39	3.36%	4.03%	26.85%	39.60%	26.17%	3.81	0.98	
	D6.3: Your host institution in Viet Nam is linked to other institutions that are known to you	8	12	45	44	40	5.37%	8.05%	30.20%	29.53%	26.85%	3.64	1.12	

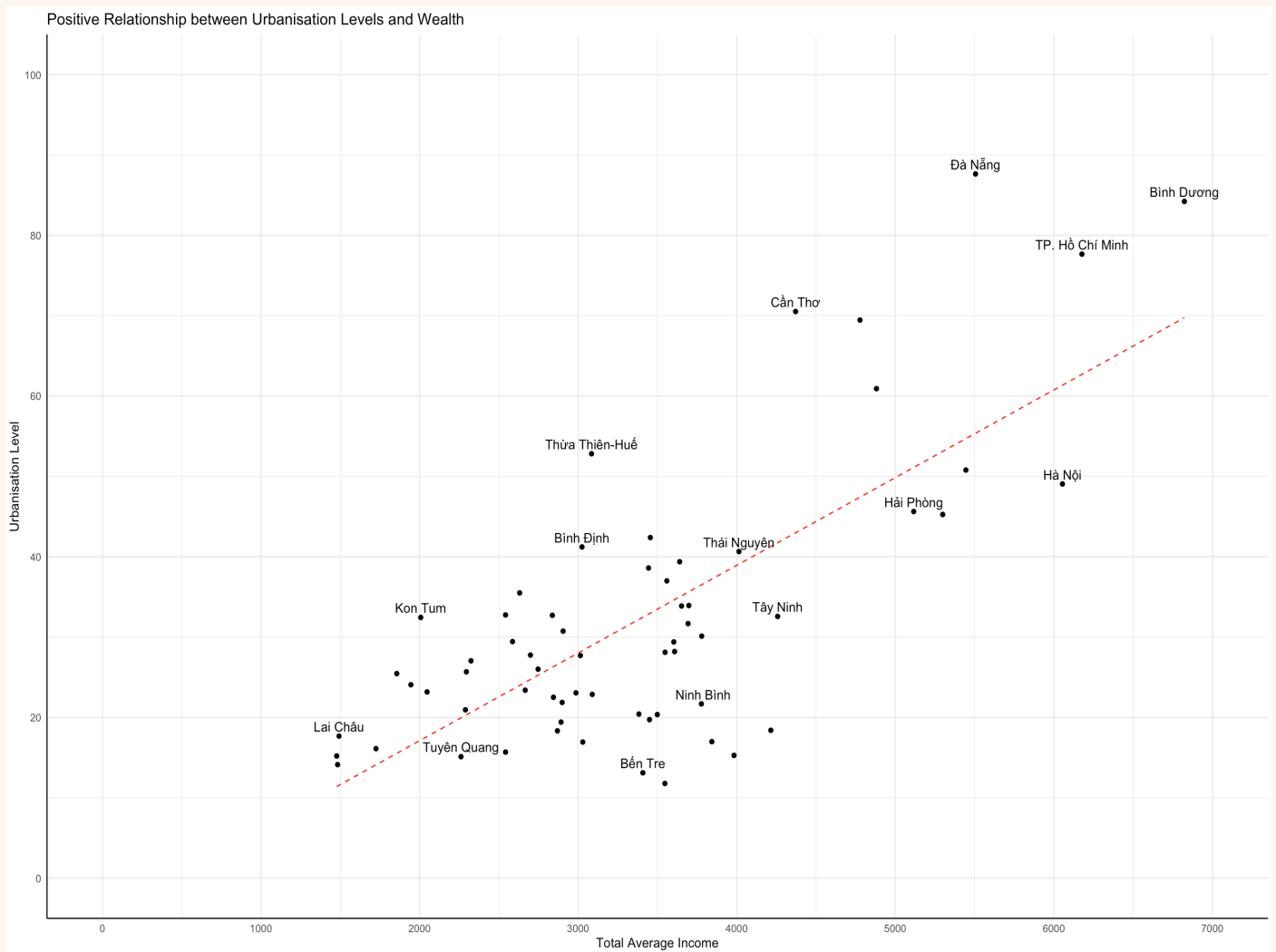
Dimension	Sub-dimension	Frequency					Percentage					Sub-dimension's Average	Standard Deviation	Dimension's Average
		Strongly disagree - 1	Disagree - 2	Neutral - 3	Agree - 4	Strongly agree - 5	Strongly disagree - 1	Disagree - 2	Neutral - 3	Agree - 4	Strongly agree - 5			
	D6.4: Your host institution has a strong alumni network	5	10	50	40	44	3.36%	6.71%	33.56%	26.85%	29.53%	3.72	1.06	
	D6.5: Many employers recognize your host institution in Viet Nam	7	10	50	47	35	4.70%	6.71%	33.56%	31.54%	23.49%	3.62	1.06	
D7: Institution Facilities	D7.1: Your host institution in Viet Nam has a large campus and excellent facilities	8	13	52	41	35	5.37%	8.72%	34.90%	27.52%	23.49%	3.55	1.10	3.73
	D7.2: Your host institution in Viet Nam has a friendly and supportive learning environment	3	9	36	56	45	2.01%	6.04%	24.16%	37.58%	30.20%	3.88	0.98	
	D7.3: Your host institution in Viet Nam has residential support for international students	14	7	38	44	46	9.40%	4.70%	25.50%	29.53%	30.87%	3.68	1.22	
	D7.4: Your host institution in Viet Nam has a website in English where you can access information easily	7	11	36	45	50	4.70%	7.38%	24.16%	30.20%	33.56%	3.81	1.12	

Dimension	Sub-dimension	Frequency					Percentage					Sub-dimension's Average	Standard Deviation	Dimension's Average
		Strongly disagree - 1	Disagree - 2	Neutral - 3	Agree - 4	Strongly agree - 5	Strongly disagree - 1	Disagree - 2	Neutral - 3	Agree - 4	Strongly agree - 5			
D8: Employment Opportunities	D8.1: After studying at a Vietnamese institution, you are interested in working in Viet Nam after graduation	13	15	37	51	33	8.72%	10.07%	24.83%	34.23%	22.15%	3.51	1.19	3.54
	D8.2: You are aware of career prospects in Viet Nam for international graduates	9	21	46	45	28	6.04%	14.09%	30.87%	30.20%	18.79%	3.42	1.12	
	D8.3: Your host institution in Viet Nam provides information about career prospects in Viet Nam after graduation for international students	13	16	42	50	28	8.72%	10.74%	28.19%	33.56%	18.79%	3.43	1.17	
	D8.4: Upon graduating from a HEI in Viet Nam, your career prospects back in your home country or other countries are promising	8	9	50	50	32	5.37%	6.04%	33.56%	33.56%	21.48%	3.60	1.05	
	D8.5: The working experience in Viet Nam will leverage your career prospects in your home country or other countries	8	6	45	50	40	5.37%	4.03%	30.20%	33.56%	26.85%	3.72	1.07	

Appendix E9: Satisfaction level of 149 international students studying in Viet Nam

Dimension	Sub-dimension	Frequency					Percentage					Sub-dimension's Average	Standard Deviation	Dimension's Average
		Strongly disagree - 1	Disagree - 2	Neutral - 3	Agree - 4	Strongly agree - 5	Strongly disagree - 1	Disagree - 2	Neutral - 3	Agree - 4	Strongly agree - 5			
D9: Satisfaction and Loyalty	D9.1: You are satisfied with your experience while studying at a higher education institution in Vietnam	5	7	31	54	52	3.36%	4.70%	20.81%	36.24%	34.90%	3.95	1.02	3.89
	D9.2: You are satisfied with your experience while living in Vietnam	5	5	32	49	58	3.36%	3.36%	21.48%	32.89%	38.93%	4.01	1.02	
	D9.3: If choosing again, you would still choose Vietnam as an overseas study destination	5	7	32	46	59	3.36%	4.70%	21.48%	30.87%	39.60%	3.99	1.05	
	D9.4: You wanted to study in Vietnam for a short time first before studying here for a longer term	12	12	39	46	40	8.05%	8.05%	26.17%	30.87%	26.85%	3.60	1.19	
	D9.5: You are willing to recommend friends and relatives to study at a higher education institution in Vietnam	6	9	32	50	52	4.03%	6.04%	21.48%	33.56%	34.90%	3.89	1.08	

Appendix F: Positive relationship between urbanisation levels and wealth



Appendix G: List of existing hubs in Viet Nam (update in progress August 2024) - in order of establishment/ official decision

No	Name of hub	Province/ City	Proximity from city centres	Year of commencement	Total area	Investors	Total investment Capital	Education Institutions	Status
1	Saigon Hi-Tech Park	Hochiminh City	15 km	1997	913 hectares (ha)	Public & private	7.1 billion USD	04 institutions: Ho Chi Minh University of Technology, Nguyen Tat Thanh University, FPT University, Fulbright University Vietnam	Operational, under further construction
2	Da Nang University Village	Borderline between Da Nang and Quang Nam	15 km	1997	300 ha (110 ha in Da Nang and 190 ha in Quang Nam)	Public	8,600 billion VND (approx. 358 million USD)	03 institutions: Vietnam-Korea University of Information and Communication Technology, National Defense Education Center, Faculty of Medicine and Pharmacy - Da Nang University	Partially operational in the Da Nang area; Land clearance pending in Quang Nam
3	Hòa Lạc High-Tech Park	Hanoi	30 km	1998	1,586 ha	Public & Private	60.01 billion VND (approx. 2.5 billion USD)	06 institutions: Vietnam National University Hanoi , FPT University, FPT School, University of Science and Technology Hanoi, V-KIST, TH School	Partly operational, under further construction
4	Vietnam International University Township	Hóc Môn, Ho Chi Minh City	19 km	2008	924 ha	FDI & Private	56,000 billion VND (approx. 2.33 billion USD)	N/A	Transferred to VinGroup in 2018, status unclear
5	Pho Hien University Township	Hưng Yên	60 km from Hanoi	2009	1,000 ha		5,530 billion VND (approx. 230 million USD)	02 institutions: Chu Van An University, Thuy Loi University (both currently having no students)	Requesting suspension and reduction of land area
6	Da Nang High-Tech Park	Hoa Vang, Da Nang	22 km	2010	1,129.76 ha	Public & Private	905 million USD	No educational institutions	Operational, occupancy rate 44%, calling for more investors
7	Vietnam National University Ho Chi Minh Township	Thu Duc, Ho Chi Minh City	10-15 km	2014	643.7 ha	Public & foreign loan	4,860.5 billion VND (approx. million USD)	08 institutions of VNU-HCM: University of Science and Technology, University of Social Sciences and Humanities, University of Natural Sciences,	Partly operational, under further construction

No	Name of hub	Province/ City	Proximity from city centres	Year of commencement	Total area	Investors	Total investment Capital	Education Institutions	Status
								University of Economics and Law, University of Technology and Information, International University, University of Medicine, Innovative Research Centre	
8	Nam Cao University Hub	Hà Nam	50 km from Hanoi	2015	754 ha	Public & Private	19,000 billion VND (approximately 792 million USD)	(planned) University of Civil Engineering, FPT UniSchool, National Economics University	Undergoing further site clearance; Under review for investor profiles and capacities
9	Van Canh University Township	Hoai Duc, Hanoi	12km	2017	67 ha	Private	3,500 billion VND (approx. 141 million USD)	N/A	Completed phase 1 : infrastructure development
10	International Education City	Quảng Ngãi	Right at the city centre	2018	10 ha	Private	1,000 billion VND (approx. 41.67 million USD)	UK Academy, IEC school	Partly operational but mainly in K12 level
11	International Education City	Hải Phòng	15 km	2020	69.5 ha	Private	13,000 billion VND (approx. 541.67 million USD)	N/A	Under construction
12	Ha Long University Township	Quang Ninh	40 km from Ha Long	2021	111.13 ha	Public & Private	9,000 billion VND (approx. 375 million USD)	N/A	Pending - will invest at a more suitable phase
13	Tien Du University Township	Bắc Ninh	30 km (from Hanoi)	2023	N/A	N/A	N/A	N/A	Under planning
14	Quy Hoà Science Township	Bình Định	8 km from Quy Nhon	2022	242 ha	N/A	N/A	N/A	Under planning

Appendix H:

Policies, Investment Standards, and Support for International Educational Institutions

1 USD ~ 24,900 VND (as of September 2024)

Type of Incentive	Description
Investment Standards	<ul style="list-style-type: none"> • Investment for new private universities (both international and domestic): Minimum of 1,000 billion VND (~ 40 million USD), excluding land use fees. At the time the government reviews and approves the project, the minimum actual investment must be 500 billion VND (~ 20 million USD) (<i>Decrees 86, 124 and 125</i>). • Investment for new branches of foreign universities: Minimum of 500 billion VND (~ 20 million USD), excluding land use fees. At the time the government reviews and approves the project, the minimum actual investment must be 250 billion VND (~ 10 million USD) (<i>Decree 124</i>). • Leased facilities or joint ventures: A 30% reduction in investment level (<i>Decrees 86, 124</i>). • Other criteria for new private universities/branches (<i>Decrees 86, 124, 125</i>): <ul style="list-style-type: none"> ◦ Area: 9 m2 constructed area/student; ◦ Faculty qualifications: 50% must hold a doctorate, 100% must hold a master's degree. ◦ Student/faculty ratio: 10:1 to 25:1 depending on the field of study. ◦ Full-time faculty: 60% of the teaching workload. ◦ Main campus: Minimum 5 hectares. ◦ Branch campus: Minimum 2 hectares • Total investment for PPP projects: Minimum of 100 billion VND (~ 4 million USD) (<i>Decree 35</i>).
Tax Incentives	<ul style="list-style-type: none"> • Corporate income tax: Exempt for the first 4 years, 50% reduction for the next 5 years (or 9 years for disadvantaged areas), followed by 10% for subsequent years. • Exemption from corporate income tax for undistributed income and gifted income. • Educational funding can be accounted as tax-deductible expenses (<i>Corporate Income Tax Law</i>). • VAT exemption for most goods/services used for educational purposes (<i>VAT Law</i>). • Exemption from import tax for fixed asset purchases for educational purposes (<i>Import-Export Tax Law and Non-Agricultural Tax</i>). • Exemption from land use tax (<i>Import-Export Tax Law and Non-Agricultural Tax</i>). • Reduced or exempted land use fees (<i>Decrees 69/2008/NĐ-CP and 59/2014/NĐ-CP</i>).
Land Incentives	<ul style="list-style-type: none"> • Educational land planning: Local authorities plan and allocate land with favorable fees and taxes (<i>Planning Law</i>). • Land allocation incentives: Priority for higher-ranking universities (<i>Higher Education Law 2012</i>). • Relocation to the suburbs: Universities in urban areas with land under 2 hectares should move to the suburbs with land over 10 hectares (<i>Decision 121/2007/QĐ-TTĐ</i>).
Loan Incentives	<ul style="list-style-type: none"> • Incentives from private banks: Loans for universities (<i>Resolution 90/NQ-CP</i>). • Loan incentives for higher-ranking universities (<i>Higher Education Law 2012</i>). • ODA Loans: Public universities approved by the Government can borrow ODA from the World Bank, ADB. • Land development loans: Some provinces/cities (e.g., Ho Chi Minh City) have lending facilities for land development (<i>Decision 5861/QĐ-UBND</i>).

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