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The International Education Market In Vietnam

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Nam)*

Prepared by the
Taylor Nelson Sofres Vietnam
With The Consulate General of Canada in Ho Chi Minh
City, Vietnam
and
Edu-Canada

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Report prepared by the Consulate General of Canada in Ho Chi Minh City, Vietnam

Fax: +84 (8) 3827 9935

E-mail: education-vietnam@international.gc.ca

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THE INTERNATIONAL EDUCATION MARKET IN VIETNAM

EXECUTIVE SUMMARY

The strong emphasis on education from Vietnamese citizens and its government, combined with positive economic growth, an emerging wealthy middle class, and clear drive from the central government to foster and develop a skilled labor force has resulted in Vietnam becoming an attractive destination for promoting international education.

In order to gain a deeper understanding of the current landscape for international education and where Canadian education fits into this landscape, the authors of this report conducted a research study comprised of desk research, qualitative in-depth interviews with institutions, education agents and government representatives, and quantitative face-to-face interviews with parents and students who intend to enroll in international education.

Within a historical context of economic struggle and hardship, Vietnamese people are pragmatic in their attitudes to education. Education is seen as critical for employment opportunities, better salaries and greater success and financial stability. Therefore, international education is increasingly sought for its high quality and prestige, providing the greatest opportunity. While the reality is that the majority must seek a local education due to financial constraints, more prestigious and reputable international degrees remain the common aspiration. Furthermore, there is a growing proportion of the population who can afford overseas education: approximately 100,000 Vietnamese students studied abroad in 2011. The US, Australia and the UK are key players, making significant inroads in terms of student recruitment and institutional partnerships, establishing strong awareness and reputation in Vietnam.

In early 2007, the Canadian government launched a coherent and sustainable national education campaign in Vietnam to encourage more Vietnamese students to select Canada as a study destination. This strategy includes enhancing coherence and cooperation among all Canadian partners in order to move towards our common objectives, increasing resources to promote education and better serve Canadian education institutions, and making visa processing procedures faster and more transparent. With the launch of the Imagine Education au/in Canada brand in 2007, and the numerous strategic promotional activities in Vietnam, including Annual Canada Education Weeks, Agent Familiarization Tours, Principals' Familiarization Tour, Media Tours to Canada, strategic visits to local institutions, participation in local education fairs, and marketing campaigns around Canada's important events, demand for

Canadian education has increased significantly. In 2011, approximately 1,000 Vietnamese students obtained study permits to Canada, a 4 fold increase from 2007.

Students and parents interviewed for this study were focused first and foremost on study abroad, with few considering other options. When prompted, however, some were open to considering alternatives such as joint degree programs or distance learning; however this erodes the experiential benefits expected from studying completely abroad (learning the language in the host country, expanding horizons through experience of other cultures).

While both parents and students are involved in decision making, parents have the most at stake in the choice of country as they are the main providers of financial support. Students are more influential in the choice of institutions and major. It is clear that both should be targeted for educational campaigns promoting education in Canada.

Key factors influencing choice of country are pragmatic, including safety of the country, cost of living, and tuition fees, reflecting the significant financial outlay required (most considering international education have budgeted for around CAD\$20,500 per year). Considerations for choice of degree include quality, international reputation and fees, while personal considerations include prestige, availability of scholarships, and the opportunity to learn the language.

Enormous opportunities exist in Vietnam for Canadian education institutions to recruit students, deliver transnational programs in Vietnam, train professionals in Canada, and establish partnerships with local institutions. In order for Canadian institutions to seize these opportunities, it is recommended that they:

- (1) Have a long term strategy;
- (2) Have an on-the-ground representative or leverage the extensive agent network across Vietnam;
- (3) Visit the market frequently;
- (4) Participate in the Canadian Consulate's signature event - Annual Canada Education Week
- (5) Engage in government-sponsored programs;
- (6) Improve admission processes (quick response time);
- (7) Sponsor familiarization tours for agents, principals/counselors, and other key influencers;
- (8) Consider scholarships as an important marketing tool; and
- (9) Take advantage of the services provided by the Canadian government (e.g. events, network of contacts, and market intelligence).

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THE INTERNATIONAL EDUCATION MARKET IN VIETNAM

METHODOLOGY

A three-phase research approach was applied:

- Desk research: Taylor Nelson Sofres (TNS) conducted a desk review of publications and statistics that are available in the area of education, including relevant documents provided by Foreign Affairs and International Trade Canada.
- Qualitative research: This included interviews with institutions, education agents and government representatives.
- Quantitative research: A survey (questionnaire) was conducted face-to-face with target respondents.

Table 1: Qualitative sample size

Qualitative In Depth Interviews	HCMC	Hanoi	Total
Education Institutions/ career counselors at the institution/school	2	2	4
Education Agents	2	2	4
Government Representative	1	1	2
Total	5	5	10

Table 2: Quantitative sample size

Quantitative face to face interviews	HCMC	Hanoi	Total
Students at grade 11	50	50	100
Students at grade 12	50	50	100
University students	30	30	60
Parents	60	60	120
Total	190	190	380

OPPORTUNITIES

Vietnam offers enormous opportunities for Canadian educational institutions. According to the latest statistics from the Ministry of Education and Training in Vietnam, in the year 2011, there were approximately 100,000 Vietnamese students studying abroad with an increasing number looking to study in countries such as the US, Australia, the UK, Canada, New Zealand, and Singapore. This number is expected to increase year on year as Vietnam's economy continues to expand, income levels rise, more multinational firms invest in Vietnam and increase the demand for skilled professionals, and affluent Vietnamese families continue to seek out high quality education for their children.

Students who are granted visas are clustered around the cities where wealth is concentrated - mainly Hanoi and Ho Chi Minh City and, increasingly, Danang and Can Tho. Vietnam's demographics will also have a positive impact on this market: 24% of the population of 88 million is currently between 12 and 24 years of age. Young Vietnamese are eager to learn the skills and obtain the knowledge that leads to high-paying jobs.

The following key factors are associated with the increase in Vietnamese students studying overseas:

- Economic growth has been stable at 5-7% annually;
- Income levels among Vietnamese citizens has increased by 5-15% annually;
- Large demand for skilled professionals in Vietnam;
- High quality education is a symbol of face and status;
- There is a tradition of studying abroad and no longer any cultural or political barriers prevent it;
- Investment in children's education is given the highest priority and is seen as an acceptable way to spend new wealth.

Taylor Nelson Sofres (TNS) youth study, TRU 2012, reveals the value that the students themselves place on education; approximately 6 out of 10 teens believe getting ahead in life will be difficult without a good post-secondary education, and 8 out of 10 believe that learning English is important for success.

It is an ideal time for Canadian education institutions to capitalize on the upswing of Canada's reputation in Vietnam and on the country's growing and receptive network of contacts. The launch of the official brand for education in Canada in 2007, the increased engagement of Canada's Embassy and Consulate in Vietnam, , and the ensuing increase in the number of visits by representatives of Canadian schools, has had a positive impact on Canada's image. Negative perceptions about the Canadian visa process being long and arduous are beginning to fade. In addition, the recent announcement by Citizenship and Immigration Canada that international students can now obtain a work permit for up to three years after graduation has also helped to further their interest in Canada. In 2011, 3007 Vietnamese students were studying in Canada and Vietnam moved up to number 13 in terms of source countries for international students in Canada that year.

In addition to student recruitment, there are growing opportunities for transnational program delivery. Delivering programs in Vietnam offers another means to profit from

the strong interest of young Vietnamese seeking an international education, but who cannot afford the high costs associated with overseas study. Most universities in Vietnam are very interested in teaming up with foreign institutions to enhance curricula and “internationalize” their programs.

Approximately 1.5 million people enter the workforce every year in Vietnam, yet few possess the skills to meet the immediate needs of industry. As a result one of the Vietnamese government’s areas of focus in education is the expansion and improvement of vocational and technical training. Indeed, a significant shortage of skilled workers exists, particularly in the oil and gas, tourism and hospitality, banking, finance, accounting, information technology, and health care fields. To overcome this acute shortage, and thereby ensure they have access to a steady stream of skilled workers, some large multinationals are partnering with foreign educational institutions to launch their own programs in Vietnam.

Student Recruitment

According to the latest statistics from the Ministry of Education and Training in Vietnam, in the year 2011, there were approximately 100,000 Vietnamese students studying in 49 countries and territories, of which 90% were self-financed. Australia is the most popular study destination with 23,738 Vietnamese students studying in the country in 2011, followed by the US, China, Singapore, UK, France, Japan, Canada, and New Zealand.

Table 3: Student permits issued in Vietnam for select countries¹

Country	Year				
	2007	2008	2009	2010	2011
Australia	3,845	6,878	9,839	8,367	7,131
Canada	214	589	707	1,064	964
New Zealand	220	297	488	671	734
UK	1,735	1,930	2,071	2,686	3,106
US	6,249	9,316	7,729	8,788	9,557

Table 4: Levels of study of Vietnamese students in select countries in 2011²

¹ <http://www.immi.gov.au/media/statistics/study/>

² <http://www.immi.gov.au/media/statistics/study/>, <http://www.educationnz.org.nz/strategyresearchstats/statistics>, British Council, Institute of International Education, Open Doors www.iie.org/opendoors

Levels of study	Country	
	Australia	New Zealand
Schools	9.30%	19.70%
Colleges	24%	7.90%
Universities	46%	33%
ESL	18.50%	32.70%
Others	2.20%	6.70%

Table 5: Levels of study of Vietnamese students in select countries in 2010/2011³

Levels of study	Country	
	UK	US
Schools	23%	n/a
Vocational/Practical training	1%	3.50%
Undergraduate	26%	74.20%
Postgraduate	30%	16.30%
ESL	8%	n/a
Others	12%	6%

*year 2011 *year 2010

Research on International Education Opportunities - The data in Figure 1 below shows that students/parents in Ho Chi Minh City (HCMC) spend more time searching for information regarding international education than those in Hanoi.

Figure 1: Time spent searching for information regarding international education, prior to registration, distributed by city

³ <http://www.immi.gov.au/media/statistics/study/>, 2010, <http://www.educationnz.org.nz/strategyresearchstats/statistics>, British Council, Institute of International Education, Open Doors www.iie.org/opendoors

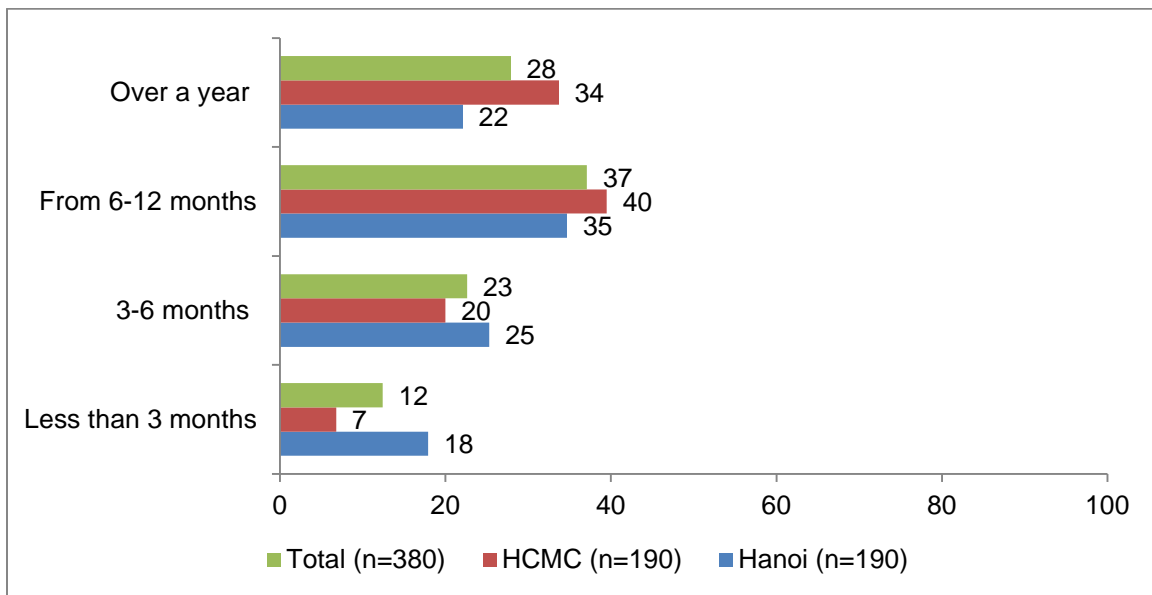
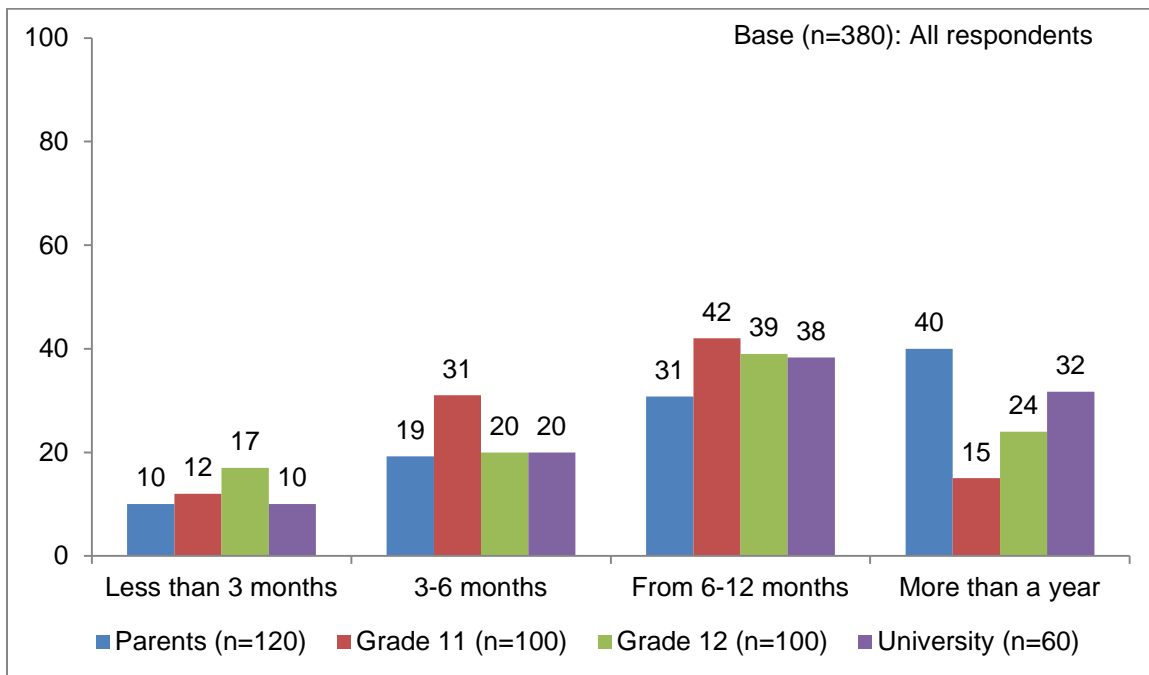


Figure 2 shows that parents tend to be more concerned about study plans for their children than the students themselves, with 40% of parents starting to search for information more than a year before the applications are submitted. Parents are typically the ones who are financially responsible for their child’s education, and therefore more lead time is required to save and prepare for future study. On the other hand, students typically began searching for information from 6 to 12 months before the applications are submitted (around 40%).

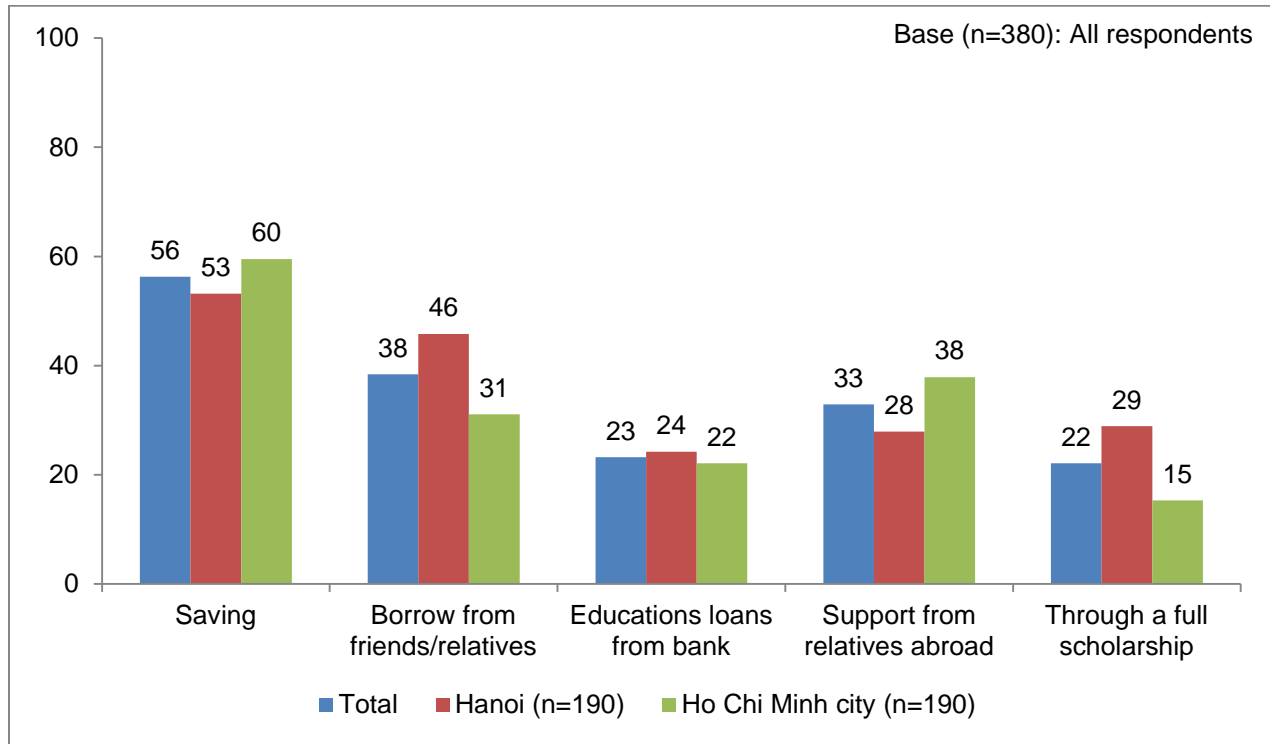
Figure 2: Time spent searching for information regarding international education, prior to registration, distributed by type of respondents.



Budget for Studying Abroad - When studying abroad is seriously considered, affordability is a key factor. Over half of respondents said they plan to fund their study with family savings. Support from relatives is very important, especially from those who are living abroad. It is noteworthy that more people in Ho Chi Minh city expected support from relatives who are already living abroad (37.9%), while in Hanoi, people tended to borrow money from their relatives locally (45.8%).

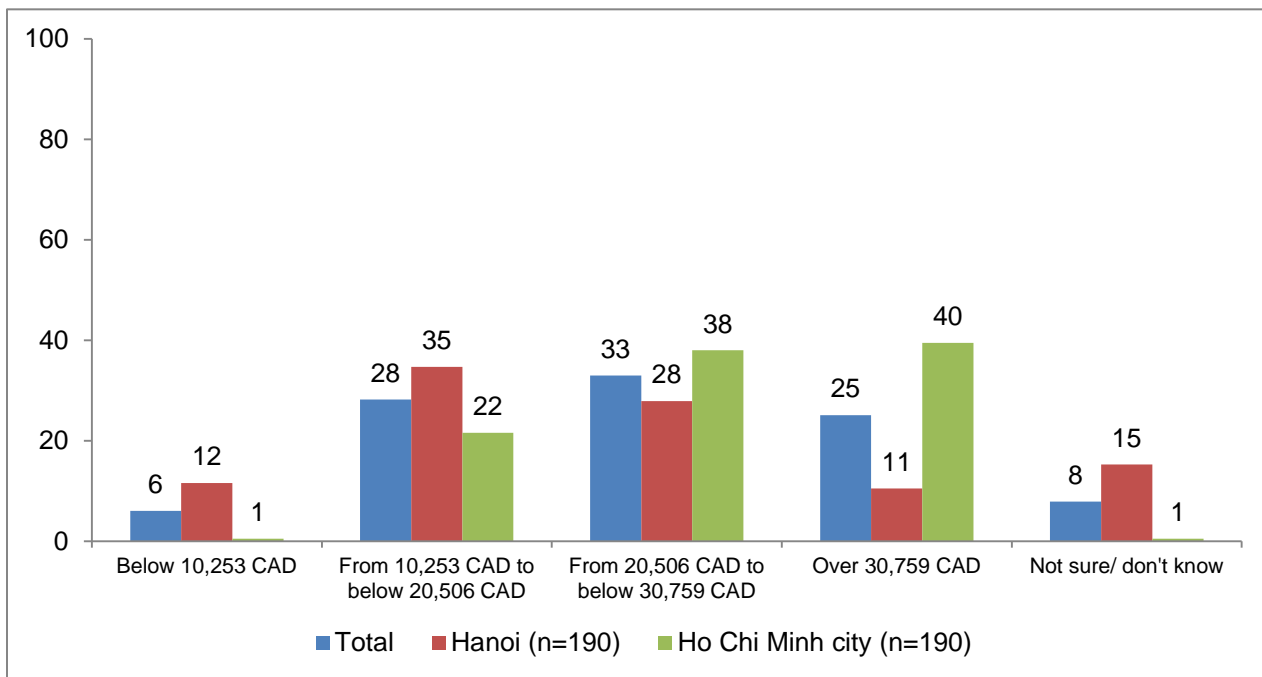
Interestingly, respondents in Hanoi are more optimistic about scholarship opportunities. Over one quarter of respondents in Hanoi indicated they will apply for a full scholarship for their study. In Hanoi, 28.9% of students would like to apply for a scholarship, double that of Ho Chi Minh City (15.3%).

Figure 3: Plan to fund intended study



Households in Ho Chi Minh City are better prepared for their study plan than those in Hanoi. While 15.3% respondents in Hanoi are “not sure” about the plan, and 11.6% have limited savings (below CAD 10,253), those in Ho Chi Minh City have a clear plan and had saved significantly more money. The majority of respondents in Ho Chi Minh City have a budget of over CAD 20,500 for their study plan (77.5%).

Figure 4: Budget for study plan



Communications - Based on desk research and a survey from Cimigo Vietnam, a leading market research company in the country, an integrated marketing strategy is suggested for Canadian institutions in this market to target both important groups, i.e. students and parents. Traditional communication channels like print media, television, billboards, and recently online media and search engines (i.e. Google), which mainly communicate news, are playing an important role in attracting parents. On the other hand, social media (including Facebook, YouTube, Twitter, forums, teen websites and TV channels etc.) and other interactive media have proved to be more effective in reaching Vietnamese youth.

K-12

According to TNS qualitative study, a growing number of Vietnamese students are applying to study abroad at a younger age. Until recently, Vietnamese students primarily went abroad for undergraduate programs, while today students as young as 15 are studying overseas, in part to better prepare for university entrance. Indeed, for the Canadian education sector, students around 15 years of age comprise the fastest-growing market segment. Short-term summer programs at high schools in Canada are also starting to attract attention in Vietnam due to their competitive pricing and parents' interest in sending their kids to Canada to familiarize them with the country before

deciding to send them there for long-term study. Table 6 below shows the distribution of the Vietnamese school-age population in 2011.

Table 6: Number of students in Vietnam in 2011⁴

Level of education	Number of students
Primary school	7,048,493
Secondary school	4,968,302
High school	2,835,025
Undergraduate/ University	1,435,887
Post graduate	28,996
College	597,263
Vocational training	686,184

Community College, Technical Institute and CEGEP

Findings from desk research and interviews with education agents indicate that the community college/technical institute segment is gaining greater attraction and experiencing growth in Vietnam. Vietnamese students and parents are increasingly recognizing the advantages of community colleges/technical institutes such as transferability to universities to get Bachelor degrees, cost savings and less difficult admission requirements compared to direct university entrance.

Although CEGEPs are similar to community college/technical institutes, the term itself and the system are yet not well known in Vietnam, partly due to less proactive marketing activities of CEGEPs and the province of Quebec in Vietnam.

University (Undergraduate)

While the undergraduate level at university is a big market in Vietnam, Canada's share does not yet match its capacity. A number of reasons explain this situation: 1) few Canadian universities work with agents; 2) Canadian institutions' admissions requirements are normally higher than its competitors; 3) Canadian universities are not yet well-known and recognized in the market .

According to the TNS survey findings and 2009 report on Vietnam's international education market regarding subjects/ majors for the next level of study, business administration, finance and banking, and information technology were considered to be 'hot majors', and are perceived as leading to better opportunities and lucrative careers

⁴ Ministry of Education and Training, 2011

(Table 7). Agents suggest that with an international qualification of business administration, graduates will easily find a management position in the business sector or be able to open their own business.

These trends are gradually changing as more students are now basing their program selections on personal interests, rather than career and income opportunities. Other fields that are showing growing popularity include marketing, tourism, hospitality, architecture, design, fine arts, music, communications, health care and environmental studies.

Table 7: Subjects/ majors that students are interested in

	Hanoi	HCMC	Total
Base (N): All respondents	190	190	380
	%	%	%
Business administration	51	52	51
Finance/accounting	44	28	36
Banking	35	22	28
Information technology	25	20	22
Hospitality & tourism	13	22	17
Economics	17	17	17
Architecture	8	14	11
Trading	13	9	11
Design/ Art	13	8	11
Engineering	10	8	9
Language	6	9	8
Others	5	12	9

University (Graduate)

Post graduate students represent a smaller sized opportunity, but there's strong intent and financial capability. In addition, the Government of Vietnam is committed to continuing its overseas scholarships programs for future leaders which Canadian institutions can also leverage.

Vietnamese Government Sponsorship Programs – Graduate Level

There are four main Vietnamese government sponsorship programs aimed at educating Vietnamese graduate students, many of whom will go overseas for their studies. These programs generally cover tuition fees, medical insurance, round-trip airfare, and living expenses. However, some form of support is expected from the partnering institutions, for example, reduced tuition fees, subsidized housing costs, or scholarships. All programs hope to send more students to Canada and are interested in partnering with more Canadian universities.

1. *Project 911*: The objective of Project 911 is to train 23,000 doctoral degree holders for tertiary institutions between 2010 and 2020 with a total budget of CAD 700 million. Accordingly, 10,000 PhD students will be trained abroad at worldwide reputable universities, 3,000 PhD students will be trained through the collaboration programs between Vietnamese and foreign universities (sandwich programs), and 10,000 will be trained in-country.

Targeted participants of the project include academic staff at colleges and universities, researchers at science research institutes, graduates with high GPA's, and professionals in the corporate sector committed to becoming professors at colleges and universities upon completion of training. Priority will be given to current educators at universities, especially top universities. Successful candidates for PhD training abroad will receive additional training on foreign languages and professional capacity prior to departure.

Areas of training include sciences technology, industry, natural sciences, agriculture, social sciences and humanities, among others, in order to support the country's social-economic development.

Table 8: Expected number of participants to be sent abroad for PhD training under Project 911 (period 2010-2020)⁵

⁵ Vietnam International Education Development, VIED 2011

Country	Number of participants
UK	300
Australia	400
New Zealand	200
Singapore	300
Korea	500
Canada	300
US	1000
Russia	1000
China	1000
France	1900
Germany	1900
Japan	1000
Others	500
Total	10.300

2. *Mekong 1000 Project*⁶: The local authorities in the Mekong Delta region aim to finance at least 1,000 young university staff and local provincial administrators to study abroad at masters or doctoral levels by 2015. Can Tho University is coordinating the screening and selection of candidates. Areas of study include: mechanics; engineering and technology; information and telecommunications technologies; food sciences and technology; civil engineering; transportation; water supply infrastructure; materials science; chemical technology; social sciences; biotechnology; urban planning and management; architecture; economics; financing; investment and banking; law; public relations and international relations; and public health.

By July 2011, 400 Masters' and PhD candidates have been sent overseas. English skills prove to be a challenge for the candidates.

3. *Eastern and Central Vietnam (ECV) 1000 Project*⁷: The ECV 1000 Project also aims to send 1,000 doctoral and master's students overseas from 2005 to 2015. The

⁶ <http://www.nesovietnam.org/dutch-organizations/opportunities/mekong-1000-scholarships>

⁷ <http://www.nesovietnam.org/dutch-organizations/opportunities/mekong-1000-scholarships>

Vietnam National University of Ho Chi Minh City (VNU HCMC), which is administering the project, will screen the candidates, who will come from provinces such as Binh Duong (about 200 students), Dong Nai (200 students), Ba Ria-Vung Tau (150 students), Binh Thuan, Binh Phuoc, and Lam Dong, among others. VNU HCMC will select only 20 international university partners for this program and wishes to include some top Canadian universities.

4. *Project 165*⁸: The objective of Project 165 is to build management capacity of government officials (deputy director level and above working in national and provincial ministries and agencies), managers of large state-owned enterprises, and new university graduates with leadership potential. The estimated annual budget is CAD 23 million. The project was initiated and managed by Politburo and political bureaus. The project was started in 2008, but it's unclear if there is a specified duration.

Training duration can vary: (1) short courses – two weeks to two months (research, study tours, conferences, seminars); (2) three months to one year – focused on present and future deputy directors (professional development programs, leadership/management, language); and (3) one to four years – focused on outstanding university graduates and under 35 year old government officials (Masters; PhDs; second bachelors for under 30 year old graduates).

Training disciplines focus on a broad range of applicable subject areas, including: public administration, economics, human resource management, urban and environmental management, international law, judiciary, public services, IT, and language.

Project 165 targeted to train 384 participants for post-graduate level, 50 for PhD and 2280 for short to medium term courses abroad with a focus on English speaking countries in 2011. They aim to increase these targets by 10% per year from 2011-2015. Besides, 550 participants were planned to be enrolled for language training, of which 250 were planned to be sent to English speaking countries (Australia, New Zealand, Singapore, Canada, UK, and US), which includes 3 months training in Vietnam and 6 months abroad.

⁸ www.vp165.vn

Language Institute (ESL)

Since English is the most dominant foreign language for studying and working in Vietnam, students tend to be interested in studying English and plan their international study in an English-speaking country. Although English is taught at schools, most Vietnamese students don't meet the ESL requirement to directly enter the academic programs in foreign countries. Therefore, there's a market for ESL institutes in recruiting Vietnamese students to their programs as part of the students' long-term plan to study in Canada. In addition, ESL institutes that are operated under the umbrella of Canadian universities can leverage the opportunity to attract Vietnamese government officials who are sent overseas for ESL studying and training on management and leadership skills.

There are also opportunities for Canadian language institutions to partner with or invest in Vietnamese English language schools to help them expand their programs and be more innovative. English teacher training is currently in great demand and most local English teachers are not high quality meaning that many students cannot communicate in English even after years of studying English at schools. International expertise in English teaching, including curriculum revision, assessment, and teacher training is welcome in Vietnam's National Foreign Language 2020 Project (Project E2020); foreign institutions can get involved by partnering with key educational institutions appointed by the Ministry of Education and Training to carry out this project. The objective of this project is that by 2020, most graduating Vietnamese students are able to communicate in English.

Language Institute (FSL)

Although it's much smaller than the English-speaking market, there is a small potential market for recruiting Vietnamese students to French-language institutions. Vietnam is a member of the Francophonie and has a French colonial past, resulting in a lingering interest in French language and culture. There are currently several French language training centers in Hanoi and Ho Chi Minh City which are able to serve the majority of the demand for French language studies. There is limited potential for Canadian institutions wanting to recruit self-financed students to French-language institutions and language schools. Most French-speaking students already plan to continue their higher education in France by self-financing or have been offered scholarships to study in France. France is among the countries that offer a lot of scholarships to Vietnamese students and their tuition fees are very competitive. Attracting these French-speaking students to any country other than France will be challenging. Though Canada is known as a bilingual English-French speaking country, currently very few Vietnamese students choose Canada as a destination for French language studies or programs. Competitive tuition fees and living costs compared to France could help French-language institutions and language schools in Canada to gain market share, if well promoted.

Education Agents

Currently, an estimated 70 percent of Vietnamese overseas students apply for their study visas through agents. Therefore, cooperating with selected agents will significantly enhance market opportunities for Canadian institutions. Leading education institutions in the United States, the UK, Australia, New Zealand and Singapore are more inclined to actively engage agents than are Canadian institutions. Canada therefore remains at a disadvantage in this agent-driven market. Canadian institutions are encouraged to contact the Canadian Consulate General in Ho Chi Minh City to obtain a list of reputable local agents.⁹ On the other hand, there exists a new trend among a small group of the new generation of parents who speak English well and have some international experience and particularly those that already have at least one child studying overseas as they will tend to apply for overseas programs and visas directly instead of using an agent.

Perception of the Canadian Market

Firstly, to understand spontaneous associations with Canada, respondents were asked to mention the first thing that comes to their mind when they think of Canada. In this case, education quality was most often mentioned, followed by living conditions and country culture/people.

Table 9: Top of mind perceptions towards Canada

	Hanoi	HCMC	Total
Base (N): All respondents	190	190	380
	%	%	%
High quality of education	46.3	21.6	33.9
Highly safe	31.1	18.4	24.7
Wonderful sightseeing	25.8	14.7	20.3
Developed country/Developed society	35.2	35.7	35.5
Friendly people	17.9	11.1	14.5
High quality of life/Good living conditions	15.8	5.3	10.5
Cool climate/Moderate climate	3.7	20.0	11.8
Vietnamese community	10	2.6	6.3

⁹ Canadian institutions are invited to direct their questions to the Canadian Consulate General using the following email address: Vietnam-education@international.gc.ca

Variety of culture	7.4	3.7	5.5
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In Figures 5 and 6, we see that those in Ho Chi Minh City have slightly more positive perceptions about Canadian education than those in Hanoi (however this difference is not significant). Overall, the majority agree that the education system in Canada is good quality and Canadian qualifications are well recognized internationally.

Figure 5: Quality of Canadian education

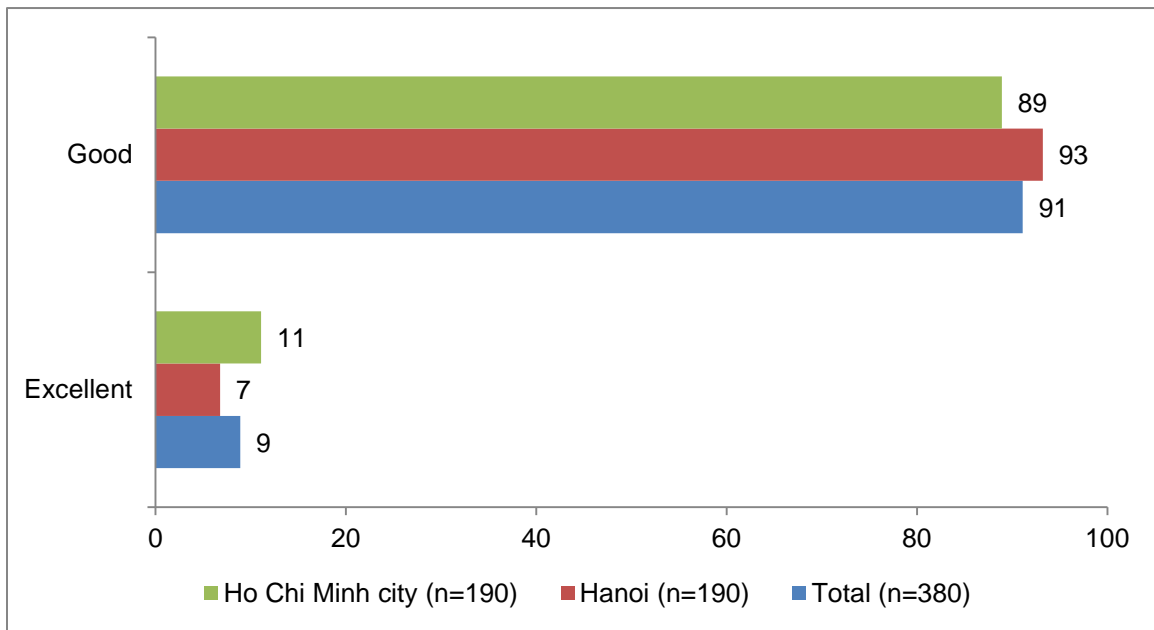
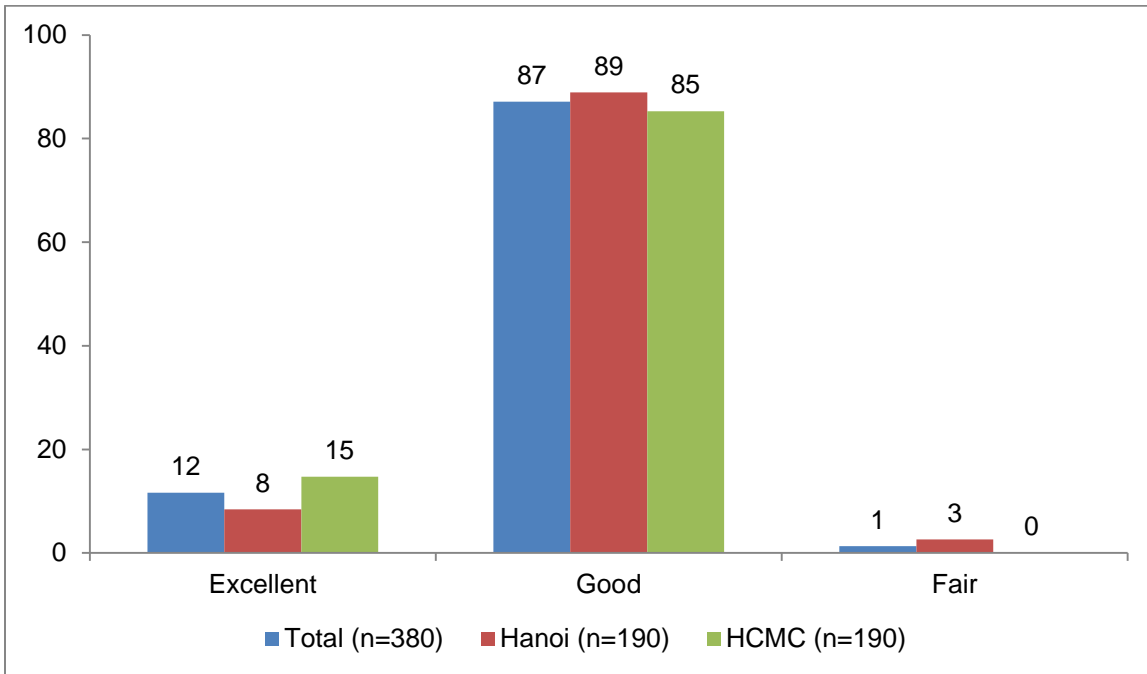


Figure 6: International recognition of Canadian diplomas/degrees



Around half of respondents thought Canadian tuition fees and living expenses were expensive, while one third said moderate. A significantly higher percentage of respondents in Ho Chi Minh City suggest that studying in Canada is “cheap” and “very cheap” in comparison to those in Hanoi. Not many respondents believe Canada is a “very expensive” place to go.

Figure 7: Tuition fees in Canada

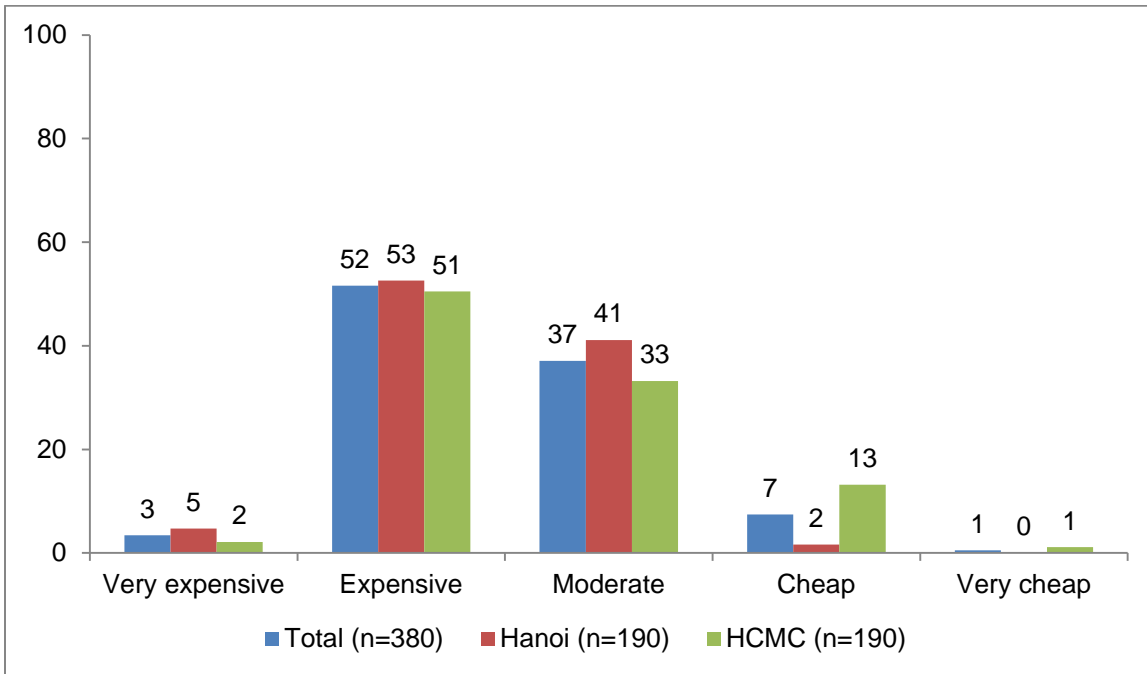


Figure 8: Living expenses in Canada

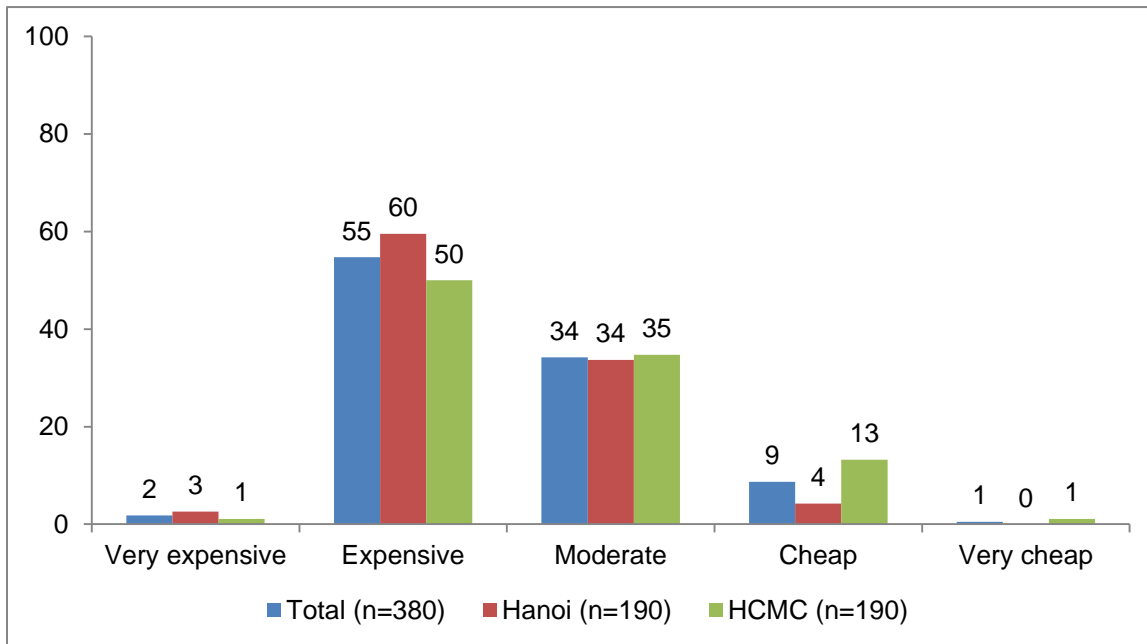
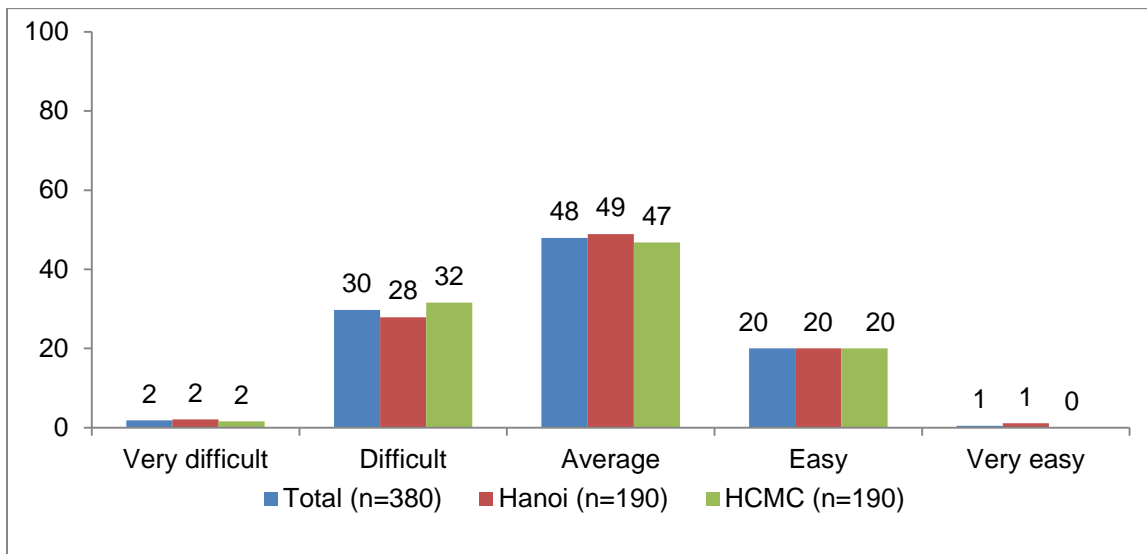


Figure 9 shows that close to half of respondents (48%) believe that the visa application procedure for studying in Canada is “average”. Less than one third (30%) think it is “difficult”, and 20% considered it “easy”. Overall, this figure implies that most respondents had a positive perception of the process of obtaining a Canadian study visa.

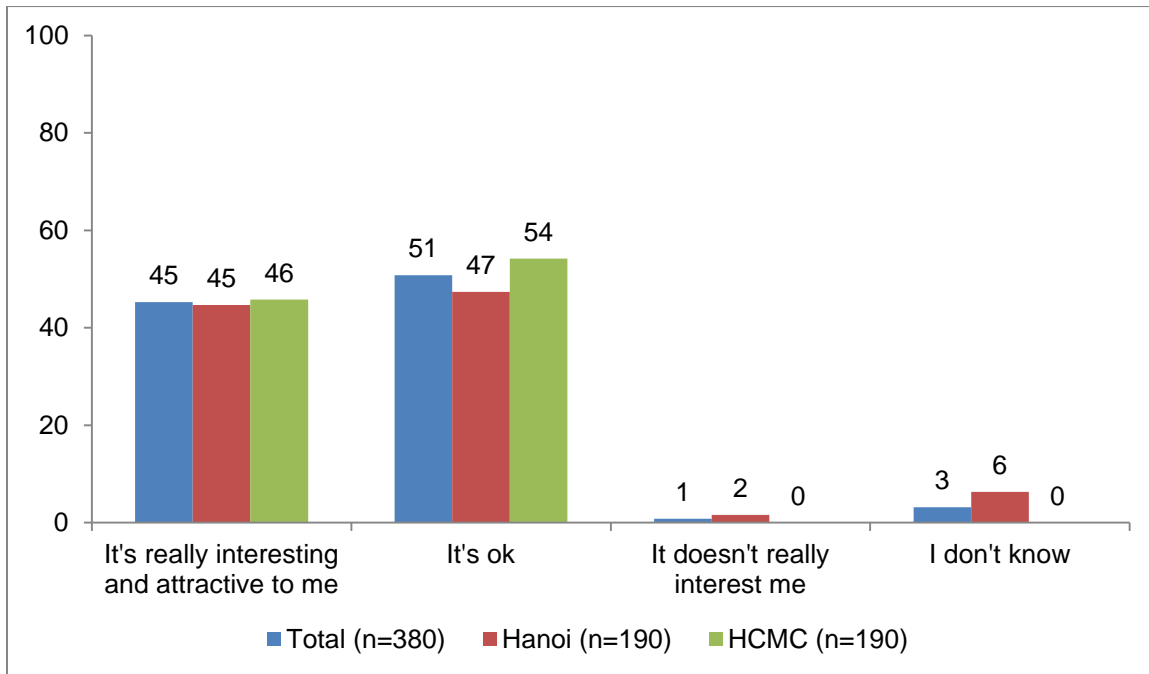
However, these responses are perceptual only, as only three surveyed respondents had actually been through the application process. These three respondents had different opinions on the visa application procedure, in which one respondent thought the process was “easy”, one thought it was “average”, and one said “difficult”.

Figure 9: Canadian study visa application procedure (e.g. demonstrating financial ability)



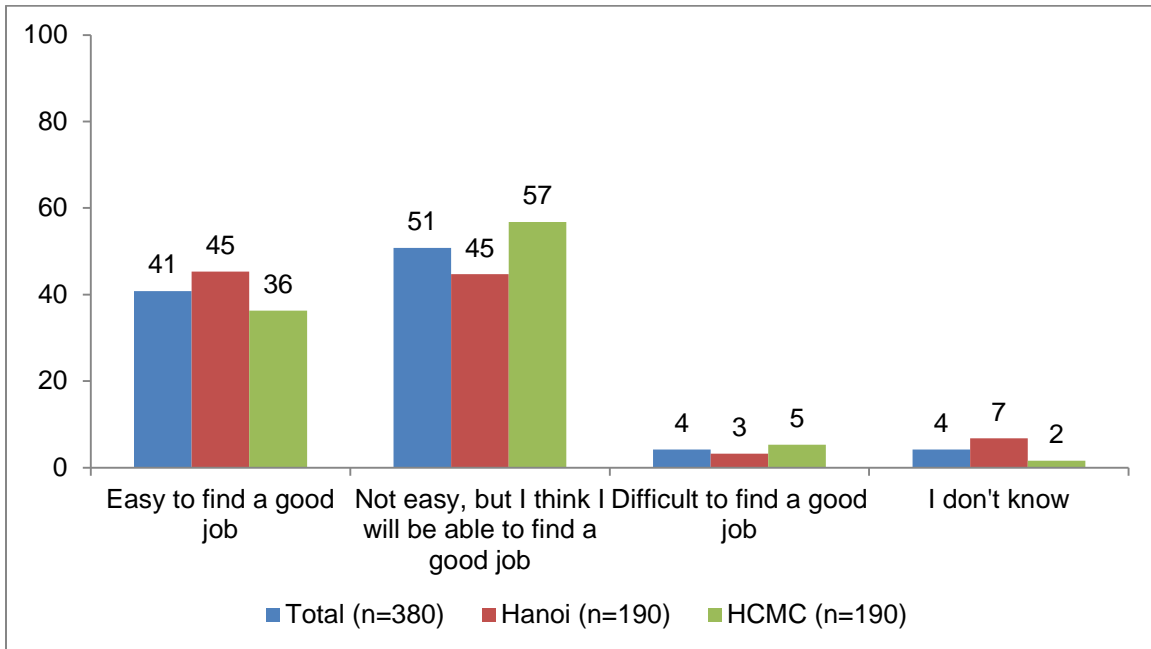
Close to half of all respondents find the Canadian lifestyle and culture interesting and attractive. The other half find it is just “ok” as their main purpose for travelling to Canada is education. Only 1.6% is not interested in Canadian culture, 6.3% in Hanoi have no idea how life in Canada is.

Figure 10: Canadian lifestyle and culture



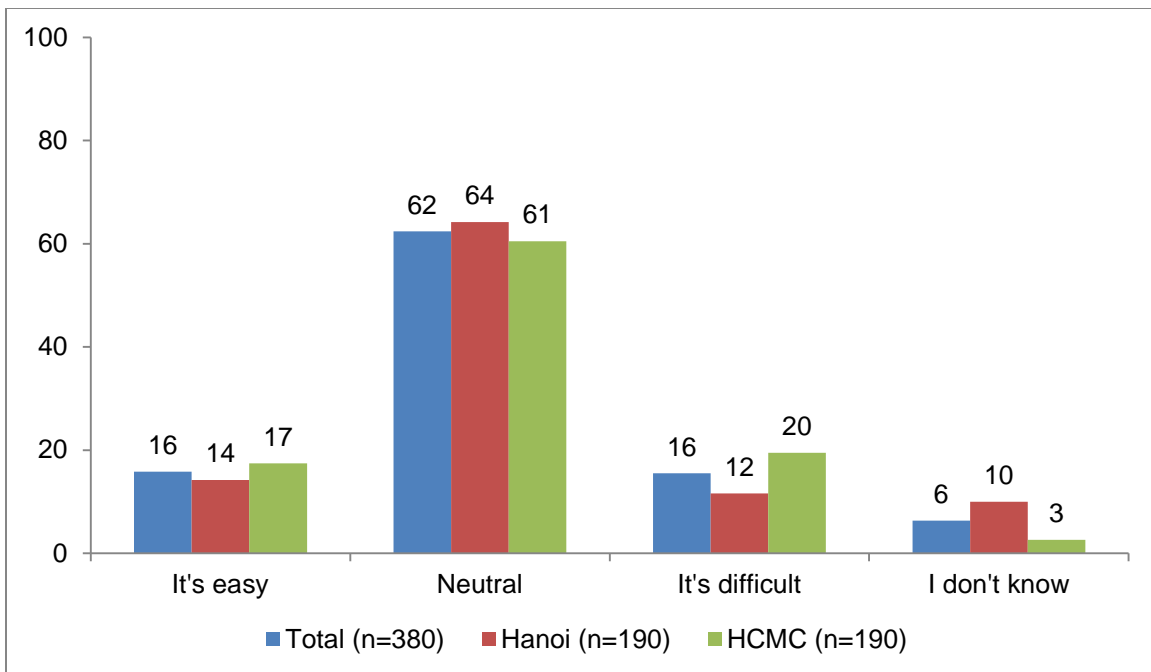
Respondents are very optimistic about the employment situation in Canada. More than 90% in both Hanoi and Ho Chi Minh believe that it will not be difficult for them to find a job after graduation. Very few people thought finding a job in Canada would be difficult. This is also a strong reflection of their desire to study in Canada.

Figure 11: Opportunity to find a job after graduation



Perceptions regarding immigration to Canada are similar in both Hanoi and Ho Chi Minh City, with more than 60% unsure (neutral) and 15.8% considering it “easy” to immigrate.

Figure 12: Opportunity of immigration to Canada after graduation



Transnational Delivery of Education and Training

Offshore Campuses

In addition to student recruitment, there are growing opportunities for transnational program delivery in which students receive all or part of a Canadian education - from K-12 through post-secondary and beyond, in Vietnam. According to in-depth interviews with education agents and educators, affordability is an on-going concern for students with regards to international education; therefore delivering programs in Vietnam offers another means to profit from the strong interest of young Vietnamese seeking an international education, but who either want to save costs or cannot afford the high costs associated with overseas study. In addition, most post-secondary institutions and many private schools in Vietnam are very interested in collaborating with foreign institutions to enhance curricula and “internationalize” their programs.

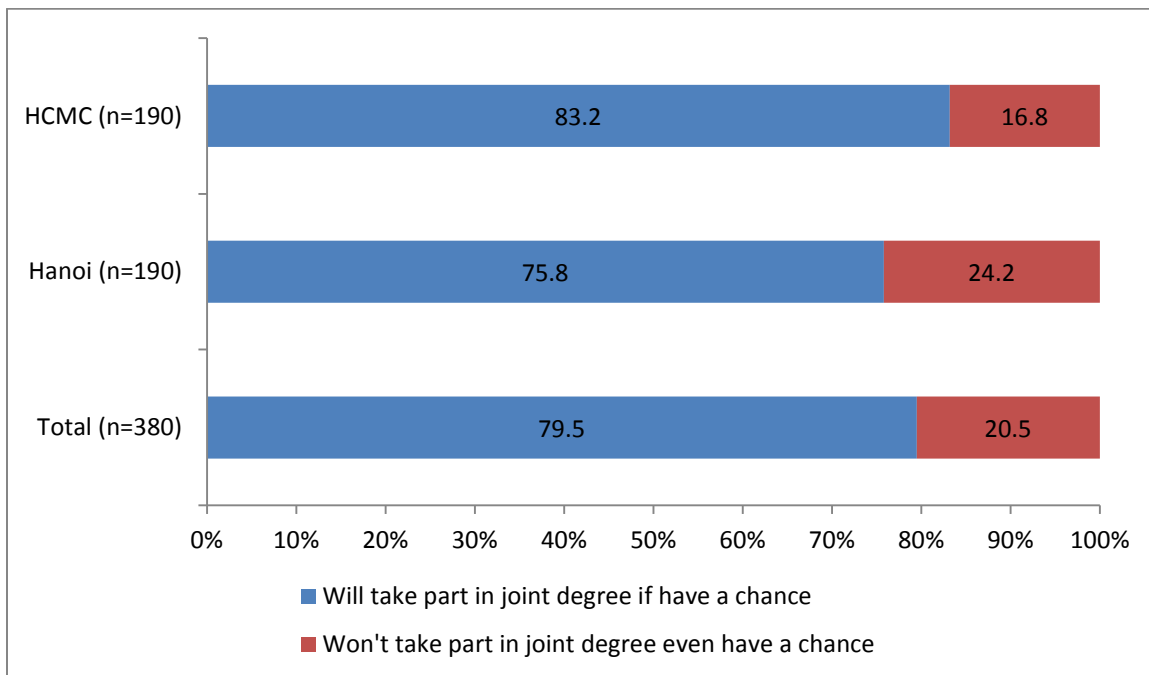
One of the Vietnamese government’s areas of focus in education is the expansion and improvement of vocational and technical training. Approximately 1.5 million people enter the workforce every year in Vietnam, yet few possess the skills to meet the immediate needs of industry. Indeed, a significant shortage of skilled workers exists, particularly in the oil and gas, tourism and hospitality, banking, finance, accounting, information technology, healthcare, and manufacturing fields. To overcome this acute shortage, and thereby ensure they have access to a steady stream of skilled workers, some large multinationals are partnering with foreign educational institutions to launch their own education programs¹⁰.

There exists a variety of options for Canadian institutions: a) establishing full campuses in Vietnam to deliver Canadian education programs, b) using local campuses to deliver Canadian education programs, and c) partnering with local institutions to deliver shared or joint degrees. The latter can involve various combinations of study time in Canada and local study time, e.g. two years in Vietnam followed by two years in Canada; or three years of study in Vietnam followed by a finishing year in Canada.

Although the transnational mode of delivery can be seen as a compromise of quality compared to a full overseas study experience, 80% of respondents would be interested in an offshore program at higher education level if they have the chance (Figure 13).

Figure 13: Possibility of joining offshore programs

¹⁰ Source: Vietnam’s international education market report 2009



While in Hanoi, reasonable cost is the most important reason for people to choose an offshore program (42.1%), in Ho Chi Minh City the most important reason is 'convenience' (54.2%) (Table 10).

Table 10: Reasons for choosing or not choosing offshore programs

	Hanoi (n=190)	HCMC (n=190)
Base (N): All respondents		
	%	%
Reasons to say "Yes"		
Convenience	20.5	54.2
High quality of education	17.9	19.5
Reasonable cost	42.1	39.5
Close to home	22.6	23.7
Reasons to say "No"		
Want to study abroad to have better self-improvement	13.7	8.4

Qualification	0.5	2.6
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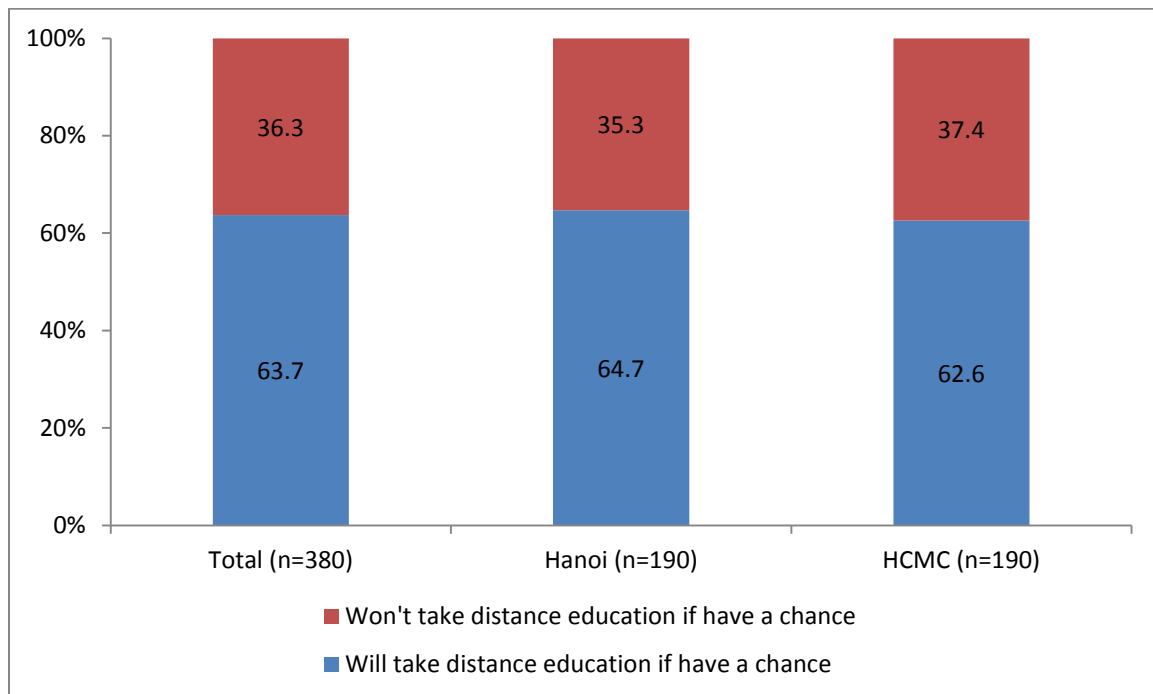
Distance Education

According to the TNS qualitative study, while distance education where programs are delivered from abroad to students in Vietnam is not yet considered a suitable option at the K-12 and undergraduate level, it is considered as an option for people who intend to study at the graduate level but do not have enough time and/or money to study abroad (e.g. teachers, lecturers at institutions).

A representative of the Ministry of Education and Training (MOET) also said that at this moment, due to an inability to evaluate the quality of distance education, MOET has not recognized credentials earned through distance learning and hasn't issued permission for any program to be fully delivered via distance learning at a local campus. However, this might be changed in the future when there is more demand for distance education and the quality of distance education can be verified.

According to the surveyed students, perceptions regarding distance education, at the postgraduate level or higher, were positive with 63.7% of respondents willing to join a program if available (Figure 14). However, it is important to note that Vietnamese students are not generally aware that credentials earned through distance education are not currently recognized by the Ministry of Education and Training.

Figure 14: Distance Education Programs



There are a small number of Vietnamese students who enroll in programs (mainly MBAs) provided directly by foreign institutions via online learning which do not use local campuses and therefore do not need to get permission from MOET.

PARTNERSHIPS

Findings from desk research and interviews with key educational contacts have painted the following picture of Vietnam's current education system: weak institutional management and leadership, minimal industry engagement, limited teaching capacity and poor pedagogy, lack of qualified lecturers, inadequate facilities and equipment, and shortage of places and variable quality.

In order to strengthen the capacity of the education system, partnerships of all types are encouraged by both the Vietnamese government and education institutions. Vietnam is actively seeking international partners for program/ curriculum development support, integration of business/industry, teacher training, leadership/management strengthening, creating flexible student-centered structures, student/faculty exchanges, and research collaboration in various fields.

According to qualitative interviews with representatives from institutions and the Ministry of Education and Training, most Vietnamese post-secondary institutions welcome partnership opportunities with foreign institutions to bring internationally recognized

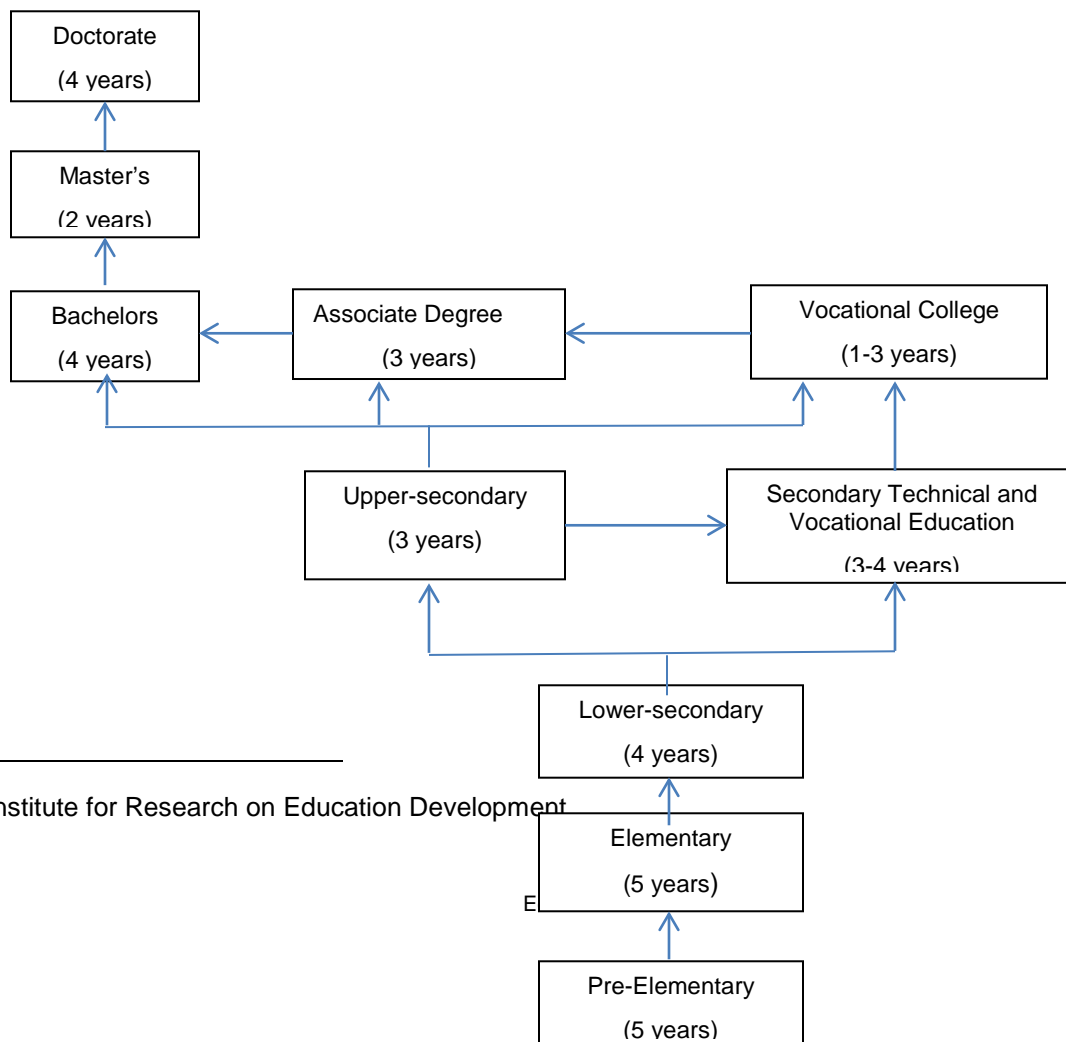
programs to their campuses. Many are particularly eager to work with Canadian institutions to diversify their programs given that they already have numerous partnerships with institutions from other countries, but none or very few with Canada.

EDUCATION SYSTEM

The Vietnamese education system is under the national control and consists of formal education and continuing education, which includes the following levels:

- Pre-primary education including nursery and kindergarten;
- General education including primary education, lower secondary education, and upper secondary education;
- Professional education including professional secondary education and vocational training;
- Higher education including college, undergraduate, master and doctoral degrees¹¹.

Figure 15: Vietnam’s Education System



¹¹ Institute for Research on Education Development

Primary and lower-secondary level education is compulsory in Vietnam, which amounts to nine years in total. The government aims to make upper-secondary schooling compulsory by 2020, bringing the number of years of schooling to twelve, which is more in line with international standards. At present, after the lower-secondary level, students may continue in upper-secondary schools or enter a vocational school. On completion of grade 12, students may apply for university or college after passing the national examination. University/College entrance is based on the scores achieved in the entrance examination, which is very competitive. High school graduates need high scores to be admitted to reputable universities. The standard length of a non-specialized undergraduate degree is four years; technical degrees require five years; and medical degrees six years. At the postgraduate level, two years are required for a master's degree and a further two or three years for a PhD.

With an estimated 60% of the country's population below 35 years of age, Vietnam is struggling to guarantee free education. Primary education is free, but higher levels are only partly subsidised, therefore students are required to pay tuition fees. In recent years education costs have been rising noticeably, though they are still lower than many other countries.

The formal education system from K-12 through colleges to universities are managed by the Ministry of Education and Training. One national K-12 curriculum taught in Vietnamese is applied across the country and enforced by the Department of Education and Training at the city/provincial level. On the other hand, secondary vocational schools which accepts grade 9 graduates and vocational colleges/schools are under the supervision of the General Department of Vocational Training (GDVT), Ministry of Labor, Invalids and Social Affairs (MOLISA).

The school year is divided into two semesters. The first semester begins in late August and ends just before Tét (Lunar New Year), and the second semester starts after the Tét holiday and lasts until June. The school week is typically five days long for primary students and six days for secondary students. The majority of students only attend school for half of the day due to a lack of classroom space.

Primary school enrolment was 94% in Vietnam between 2005 and 2009 according to UNICEF, very similar to its neighbours. However, secondary school enrolment is much lower and is around 50% for upper-secondary level, according to the World Bank. Low-income households are not able to afford the tuition fees that increase with each additional school year. Dropout rates are highest in rural areas, among ethnic minorities and female students.

Higher education enrolment is also rather low and was estimated to be in the range of 13-16% in 2009.

The opportunities for higher education in Vietnam are considered to be limited as the system can accommodate only a fraction of those seeking admission. In 2009, the total number of higher education institutions was 376, with the majority concentrated in the larger cities such as Hanoi, Ho Chi Minh City, Da Nang, Can Tho and Haiphong. On the other hand, some larger universities have branches in smaller cities and towns, and colleges are located in all the provinces.

Vietnam's universities have space for only 400,000 of the 1.2 million candidates who take university entrance exams. The private education sector has grown significantly since 1989, with a supportive policy from the Vietnamese government. In 2010, the non-public sector accounted for around 13% of all higher education enrolments, and official expectations are that by 2020 it will account for 40% of enrolments.

Total enrolments in 2009 reached 1.75 million, up from only 133,000 in 1987 according to official statistics. The Vietnamese government estimates that two million students will be seeking tertiary education by 2015. As the local system will not be able to handle the rapidly rising demand as well as provide the required quality, Vietnamese students are likely to choose international programmes. Although more private universities are being set up to cater to the country's high demand for tertiary education, quality is still a cause for concern for education reformers in Vietnam. Qualifications awarded by private universities are currently not regarded as prestigious as those awarded by public universities. Increasingly, Vietnamese public universities are seeking to diversify to offer a wider range of subjects and to use curriculum and teaching staff from overseas education institutions to improve the quality of teaching and learning¹².

Although the number of post-secondary institutions has increased dramatically, the number of lecturers has remained virtually unchanged. The number of lecturers for higher education only satisfies 60 % of the demand. Faculty qualifications are generally low and vary significantly across types of higher education institutions. Furthermore, there is also the issue of quality control. Currently there is no system in place yet to check on the quality of the rapidly increasing number of educational programs and institutions being established. As such, there's no standard process in place to validate international/Canadian credits to allow transferability from credits earned in Canada to Vietnam.

Vietnam's higher education system, much like China's, was heavily influenced by Confucianism and the Soviet model. The former emphasized rote learning, repetition and memorization over innovation and the latter stressed ideology and theory over practice. Most schools suffer from obsolete equipment, outdated curricula and retrograde teaching methods¹³.

¹² British Council – Euromonitor 2011 on Vietnam

¹³ Vietnam's higher education market report: NUFFIC 2010

Vietnam receives foreign aid for implementation of education and training projects. For example, Official Development Assistance (ODA), an OECD arm, provides Vietnam with annual support of around £1.2 billion from ODA donors.

According to the Vietnamese Ministry of Education and Training, the Vietnamese education system has achieved important results, including increased enrolment, improved school infrastructure, and diversification of delivery modes. According to the Ministry, a relatively complete, unified and diversified education system has been built with all levels from preschool education to doctorate training. The general education school network continues to expand throughout the country, and vocational schools, classes and centres are developing in different forms with short-term vocational training classes showing strong development. The Ministry furthermore states that universities and junior colleges have been established in almost every urban centre of the country as well as in rural regions and localities.

Over the next decade, Vietnam's government aims to increase spending on education from 15% to 20% of the national budget. The government also has plans to initiate a multi-level plan, which spreads over the 10 years, involving structural and quantitative investments in the education sector. A new nationwide curriculum will be enforced and four new universities will be built according to international standards¹⁴.

MARKET ENVIRONMENT

Social and Economic environment

Vietnam's demographics are very favorable for the international education sector. With 89 million residents, Vietnam is Asia's sixth most populous country. About 60 percent of the population is below the age of 25, making it Asia's second-youngest economy after the Philippines. Vietnam's fertility rate, while falling from six children per family in the 1960s to 2.3 children per family in 1998, remains strong. Vietnam's population is expected to grow to 100 million by 2024¹⁵.

Although once one of the region's poorest countries, following a century of imperialism and war, Vietnam is now one of the world's fastest-growing economies. The Doi Moi reforms in the 1980s opened up the economy and brought about profound positive results for the country. Average per annum GDP growth since the lifting of the US embargo in 1993 has been around 7.4%, with a record-high 8.5% growth in 2007, the

¹⁴ British Council – Euromonitor 2011 on Vietnam

¹⁵ Vietnam's international education market report: Trade Commissioner Service 2009

year Vietnam entered the World Trade Organization. The global recession hurt Vietnam's export-oriented economy, with GDP in 2009-11 growing less than the 7% per annum average achieved during the last decade. In 2011, Vietnam's economy grew by 5.8%. While this was the lowest rate in almost a decade, the growth rate is still one of the highest in the region.

While Vietnam's economy remains dominated by state-owned enterprises, which still produce about 40% of GDP, Vietnamese authorities have reaffirmed their commitment to economic liberalization and international integration. They have moved to implement the structural reforms needed to modernize the economy and to produce more competitive export-driven industries. The government's strong growth-oriented economic policies have caused it to struggle to control one of the region's highest inflation rates, which reached as high as 23% in August 2011 and averaged 18% for the year.

Due to this rapid economic expansion, average incomes in urban centers have increased considerably, creating a robust middle class, according to survey data from TNS Global Vietnam. This largely urban middle class enjoys greatly improved living standards, with higher disposable incomes increasingly being invested in educating their children. This phenomenon is not being witnessed in rural areas, however, where the majority of Vietnamese live.

Political Environment

Vietnam operates under a one-party communist system. Since 1986, when it embarked upon its process of reform, Vietnam has followed a development path modeled on China's. The communist party concentrates on fostering economic development to ensure the country's stability.

In January 2007, Vietnam formally became a member of the World Trade Organization. The accession demonstrated Vietnam's commitment to achieving the rapid economic reforms outlined in its 2006-2010 Five-Year Plan and should help make the economy more open, transparent, and predictable for business¹⁶.

Market Entry Considerations

Depending on Canadian institutions' admission deadlines, September/October/November and February/March are the best times of the year for recruiting Vietnamese students. For the spring season, Vietnamese Lunar New Year (Tết) and the period spreading over two weeks before and after Tết should be avoided.

¹⁶ www.chinhphu.vn

English is increasingly becoming popular in Vietnam. The command of English of Vietnamese students as early as the age of 10 and new generation parents in urban areas like Ho Chi Minh City and Hanoi is very high, which helps them in searching for information on overseas study.

Given Vietnam's recent turbulent history, the fact that it ranks 8th among all countries sending students to the US is an extraordinary achievement (See Table 11 below).

Table 11: Top 10 Sending Countries and GDP

Top 10 Sending Countries & GDP			
	Rank/Students	GDP	Rank
 China	1 (202,003)	\$11.29 trillion	3
 South Korea	2 (107,054)	\$1.55 trillion	13
 India	3 (98,554)	\$4.46 trillion	4
 Saudi Arabia	4 (51,999)	\$677 billion	24
 Canada	5 (30,104)	\$1.39 trillion	15
 Japan	6 (26,591)	\$4.39 trillion	5
 Taiwan	7 (25,213)	\$885 billion	20
 Vietnam	8 (18,537)	\$299 billion	43
 Mexico	9 (17,054)	\$1.65 trillion	12
 Brazil	10 (15,517)	\$2.28 trillion	8

Sources: DHS; CIA World Factbook, 2011

Vietnam's position on this list is remarkable as the country has a GDP of only \$299 billion and a world ranking of 43rd, making it by far the poorest country among its peers. These statistics reveal the following:

1. The cultural value of education;
2. The importance of making significant investments in education both in Vietnam and abroad;
3. The disproportionate amount of income that Vietnamese parents spend on their children's education; and
4. The positive prospects for continued growth¹⁷.

Government Regulations

¹⁷ <http://markashwill.wordpress.com/>

Establishing a Foreign School in Vietnam¹⁸

According to Vietnam's WTO Schedule of Specific Commitments (www.wto.org), foreign-invested education entities are currently only permitted in the form of joint-ventures, although majority foreign ownership is allowed. However, since January 1, 2009, 100-percent foreign invested education entities have been permitted.

The first step in establishing a foreign entity in Vietnam is to apply for an investment certificate. The foreign investor must already have prepared a clear and detailed description of the project, which includes planned investment capital, location, and a project implementation schedule. The application for the certificate must be submitted to one of the two licensing authorities in Vietnam: the provincial or municipal (where applicable) People's Committee or the appropriate Board of Management where the investment is undertaken. The appropriate Board of Management grants investment certificates for projects in industrial zones, export-processing zones, and high-tech parks. Generally each of these zones has its own Board of Management, but in the absence of such a Board, the People's Committee will grant the certificate. Furthermore, the People's Committee will grant investment licenses for any projects outside of these zones.

The certificate, once issued, has a fixed term of up to 50 years, although it can be extended an additional 20 years upon approval by the Government. The certificate will detail the scope of activities that the investor can undertake, the amount of investment capital permitted, as well as outline all applicable incentives for which the investment is eligible.

While the certificate will be issued within 15 business days in most sectors, the process can take up to 30 days if an evaluation is required, such as for projects in education and training. Generally, an evaluation is required in two cases: where the investment is estimated at over 300 billion VND (Vietnamese dong), or CAD19.48 million, or when the investment is categorized as "conditional".

Education and training investment projects fall within the Conditional Investment Sectors category, which generally means that an additional review is required by a central agency. In the case of education, the Ministry of Education and Training reviews the application for an investment certificate.

A separate prime ministerial approval is also required to set-up university training establishments. In theory, the granting of prime ministerial approvals should take 40 to 60 days; however, bureaucratic realities and lack of public funds can extend this process to six months, or longer. Unfortunately, the criteria for licensing an education program are not set out in a clear and coherent manner. This lack of transparency makes it difficult to predict whether or not a license will be granted.

¹⁸ The Ministry of Education and Training

The Vietnamese government promotes investment in certain sectors such as education and training, healthcare and scientific research by offering incentives for foreign investment. These incentives include a favorable 10 percent Corporate Income Tax (CIT) rate to be applied over a 15-year period from the moment a company begins generating a taxable profit (soon expected to be from when taxable revenue is generated). During the first four years in which this incentive is in effect, foreign entities are eligible for a four-year tax holiday, followed by a nine-year 50 percent CIT reduction period when the tax holiday expires.

There is no specific industry standard requirement applied to international education and training service providers, despite its listing as a “conditional” investment according to Article 29.1.h of the 2005 Law on Investment. Educational institutions looking to establish a local campus are required to present their curricula to the Vietnamese government prior to obtaining an investment and operating license. Providers operating within the context of an aid-funded project will be awarded the project on the basis of course content. Providers engaged in twinning arrangements/joint-programs with Vietnamese institutions need concur with their partners in course content, financing, and management. The two partners will then sign an agreement for partnership and submit their application to the Department of International Education Development (VIED) at MOET for the operation permit.

COMPETITIVE ENVIRONMENT

According to qualitative findings from TNS, the top education markets for Vietnamese students are: the USA, the UK, Australia, New Zealand, Singapore and France.

- USA is the key market in Ho Chi Minh City (HCMC) as many have relatives living in the US, hence, it is considered to be more convenient.
- The UK is appealing in Hanoi for cultural prestige and short study time (only 3 years for Undergraduate level and 1 year for Master level).
- Australia is also a popular choice in both Hanoi and HCMC. The Australian Government sponsors a number of scholarships for Vietnamese students, making it more attractive as a destination. This is also reinforced by the IDP Education center, providing a contact point and information for potential students.
- New Zealand is now a growing market thanks to similar culture and close location to Australia.
- Singapore is appealing for close proximity to Vietnam and lower costs than other more prestigious destinations.
- Among Francophone countries, France is the top-of-mind destination of students and parents thanks to its historical links to Vietnam.

TNS qualitative and desk research findings indicate that there are a limited number of students considering Canada as a destination due to distance and limited general knowledge about the country and its education offerings. According to TNS's youth study, TRU 2012, which was done on a more general sample, more than 1 in 3 students planning on enrolling in international education listed the US as their destination for study. This was closely followed by the UK (30%) and Australia (14%), whereas Canada did not make the list.

Strengths and Weaknesses of Key Destination Countries

As a part of TNS study, the following table highlights the perceived strengths and weaknesses of the key destination countries for Vietnamese students from the qualitative perspective of institutions, education agents and government representatives:

Table 12: Strengths and Weaknesses of Key Destination Countries

Country	Strengths	Weaknesses
The US	<ul style="list-style-type: none"> • High quality of education – known for commerce/economics • Prestigious institutions • Many Vietnamese have relatives living in the U.S → more secure when sending their children to study abroad, known outcomes from study abroad (see success of those studying in the U.S) • Considerable number of Vietnamese students who are granted scholarships to study in the U.S every year • Variety of subjects to choose from • Wide range of living costs and tuition fees • Quick visa processing time (2-3 days) • The American Centre is open to the public for information on culture and education 	<ul style="list-style-type: none"> • Desire more information • The US is considered somewhat unsafe (as a result of multiculturalism). It is believed that in the US, when there are many kinds of people from different countries living in a same place, students can easily learn bad behaviors from other friends, i.e. drug use. • US lifestyle provides exposure to a range of indulgent activities – students may become spoiled and lazy

<p>The UK</p>	<ul style="list-style-type: none"> • High quality of education • Many prestigious universities/ institutions • Well-known for royalty (prestige) • Long-standing, established culture • Original country of the English language • British Council is open to the public for information on culture and education and provides ESL training • British Council sends annual/monthly reports to agents about updated information on UK education • Conducts workshops for agents, parents and students to promote UK education • Supports agents to keep track of visa process • Short-time studying: 3 years for bachelor level, 1 year for masters level 	<ul style="list-style-type: none"> • High tuition fees • High cost of living • Far from Vietnam and somewhat unknown • Business/ marketing programs not yet known to compare favorably with other countries
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<p>Australia</p>	<ul style="list-style-type: none"> • High quality of education • Grants for a large number of scholarships in Vietnam • Friendly and safe culture • Many activities to promote Australian education, through the IDP Education Centre • Good collaboration with local institutions to promote Australian education • Sends volunteers to high schools to teach English to high school students. Via those English lessons, they also promote Australian education and introduce Australian culture to students to make them feel the friendly culture of Australia • Conduct workshops frequently • Grant for summer camps for students • A large number of alumni come back from Australia and achieve success in work / career • Cool climate • Close to Vietnam 	<ul style="list-style-type: none"> • High cost of living and tuition fee due to the rise in the Australian dollar • No student counseling center
<p>New Zealand</p>	<ul style="list-style-type: none"> • Near to Australia - people find the country can be similar to Australia but cheaper than Australia • Similar culture to Australia (i.e. friendly and safe) • Increasing amount of information available about 	<ul style="list-style-type: none"> • Not yet as prestigious as the US, UK and Australia

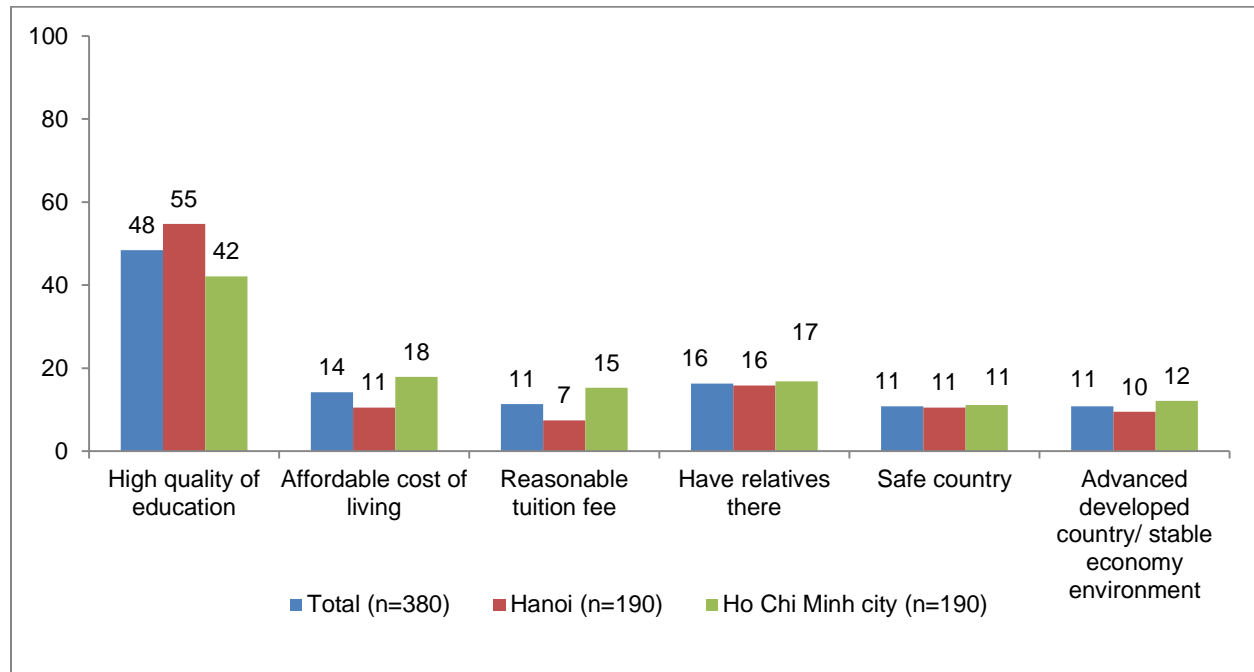
	<p>the country and education via agents and workshops</p> <ul style="list-style-type: none"> • Support Vietnamese students to come to New Zealand for summer courses, students only need to buy flight ticket, schools will provide grants for accommodation and living expenses • Living expenses and tuition fees cheaper than Australia • High quality of education • New Zealand Education office provides counseling service to students 	
<p>Singapore</p>	<ul style="list-style-type: none"> • Close to Vietnam • English speaking country • The culture is similar to Vietnamese culture • Cheaper tuition fees thanks to support from Singaporean government • A lot of information available promoting Singaporean Education via workshops and summer camp for students • Singapore also has partnership with the MOET, and offers free English language training course for MOET staff in order to have better collaboration when they want to promote Singaporean Education. • Have partnerships with institutions in the US and UK, adding to the prestige and credibility of 	<ul style="list-style-type: none"> • Not as prestigious as other countries • Seen as a second choice compared to larger, more prestigious countries

	some Singaporean programs.	
France	<ul style="list-style-type: none"> • No tuition fees to some schools at undergraduate level due to the Government policy of France to promote French speaking in other countries. • Strong historical links to Vietnam • Well-known for healthcare programs 	<ul style="list-style-type: none"> • French language is not as popular as English language in Vietnam in terms of work requirements, hence, there are a significantly higher proportion of students in Vietnam choosing to go to English speaking countries instead. • There are a very limited number of agents that provide services for students who would like to study in Francophone countries. • Not many programs promoting French education available in Vietnam.
Canada	<ul style="list-style-type: none"> • Developed country • High quality of education • Affordable price 	<ul style="list-style-type: none"> • Lack of information/knowledge about education in Canada. • No Canadian education center to provide counseling service • Few scholarships provided • Far from Vietnam with a cold, unfamiliar and uncomfortable climate • Difficult to gain admission to Canadian institutions due to high demands in selection process • Visa processing time is generally longer than their competitors • Agents cannot keep track of a student's visa process on behalf of the student

Factors Affecting Choice of Study Destination

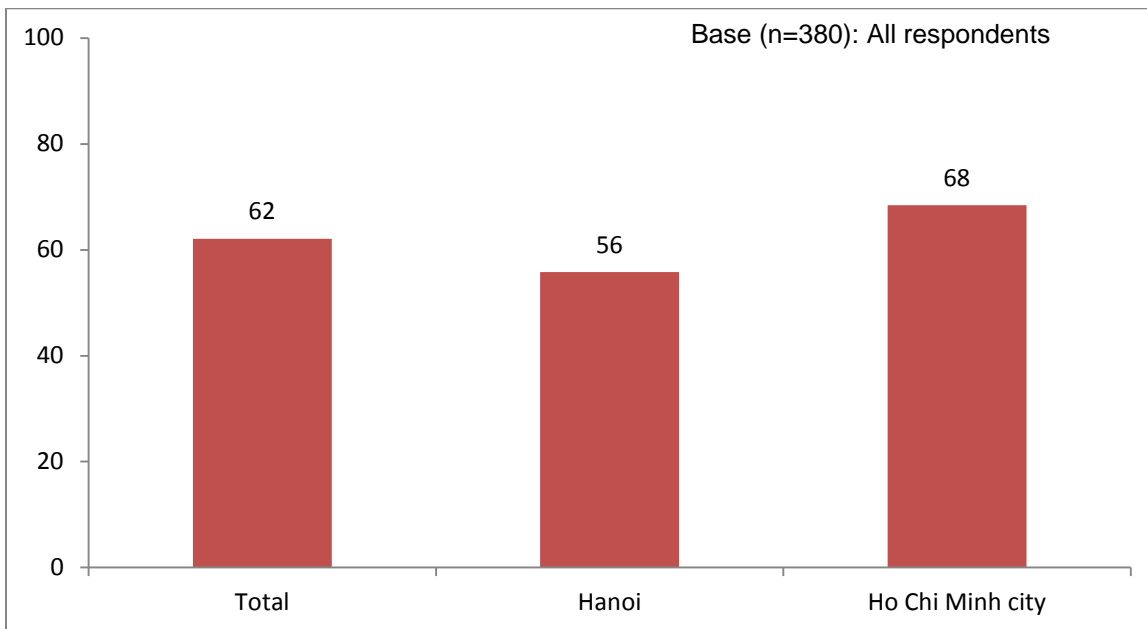
Figure 16 shows the important factors which influence choice of country as a study destination.

Figure 16: Important factors that make people choose a destination for study abroad



Taking a closer look at the role of overseas relatives, out of 380 respondents, more than half have at least one friend or relative who is living abroad. However, in Ho Chi Minh City alone, the figure is close to almost 7 in 10. This is possibly related to migration from Southern Vietnam during and after the Vietnam War. Findings have shown that the presence of friends or relatives living abroad acts as a strong reference point and source of information for students' and parents' deciding on a destination for overseas study.

Figure 17: Friends or relatives who are living abroad



The following table (Table 13) presents the list of countries where respondents’ friends and relatives are living. When reading these results, however, it must be again taken into account that they are from the perspective of students and parents already considering study in Canada. Interestingly, more students and parents have relatives or friends living in the UK than in Canada. Results such as this further demonstrate that having friends or family in Canada is playing some role in country decision, but is by no means the key criterion.

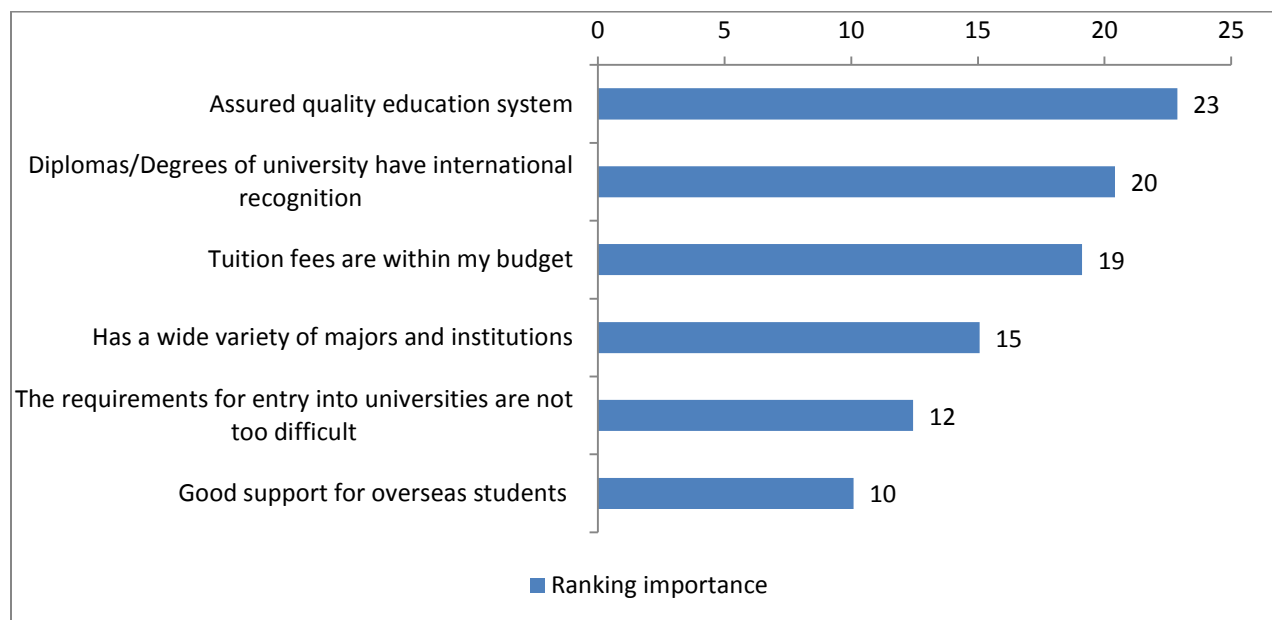
Table 13: Countries where friends or relatives are living

Country	Hanoi	HCMC	Total
Base: Those who have friends or relatives living abroad	106	130	236
	%	%	%
UK	26	67	48
Canada	36	38	37
Australia	15	18	17
US	16	5	10
Singapore	15	5	9
France	15	2	8
German	10	1	5

New Zealand	5	0	2
Others	15	2	8

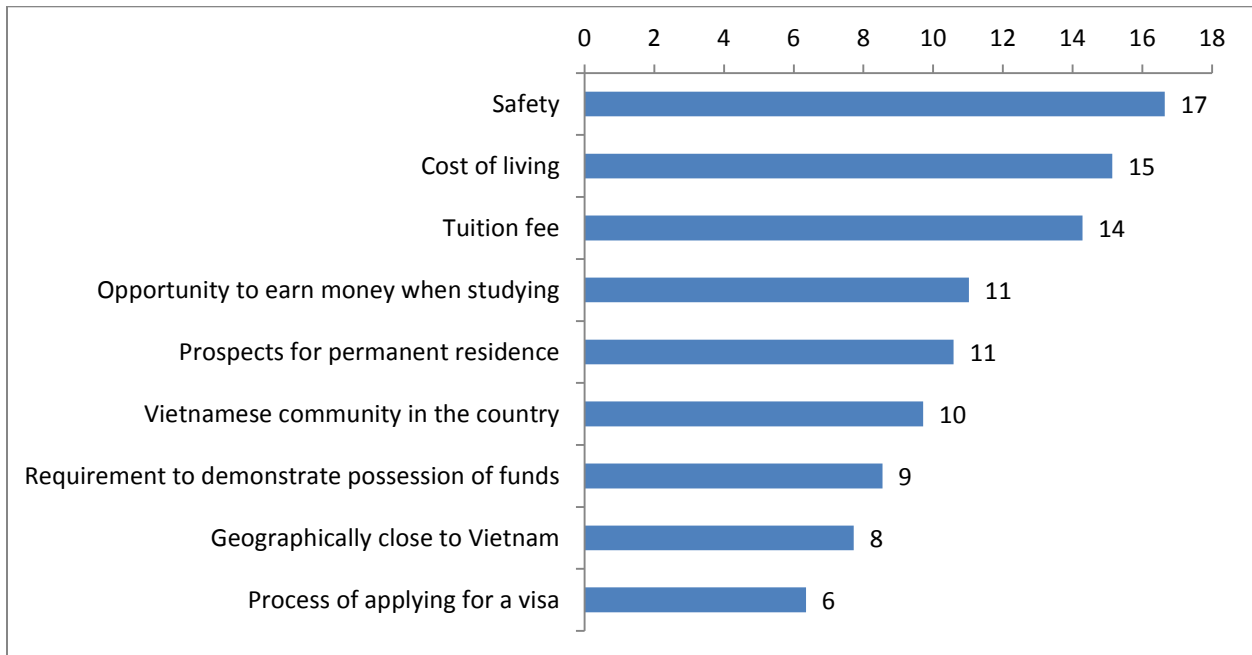
In terms of educational conditions important for overseas study, quality of education and international recognition of degrees are paramount (Figure 18). This is closely linked with how Vietnamese youth perceive the road to success – good degree → high salary → happy life and family. Tuition fees are also seen as important, whereas a variety of majors, less difficult entry requirements and support for overseas study were not ranked as highly important.

Figure 18: Ranking influential factors in terms of educational conditions



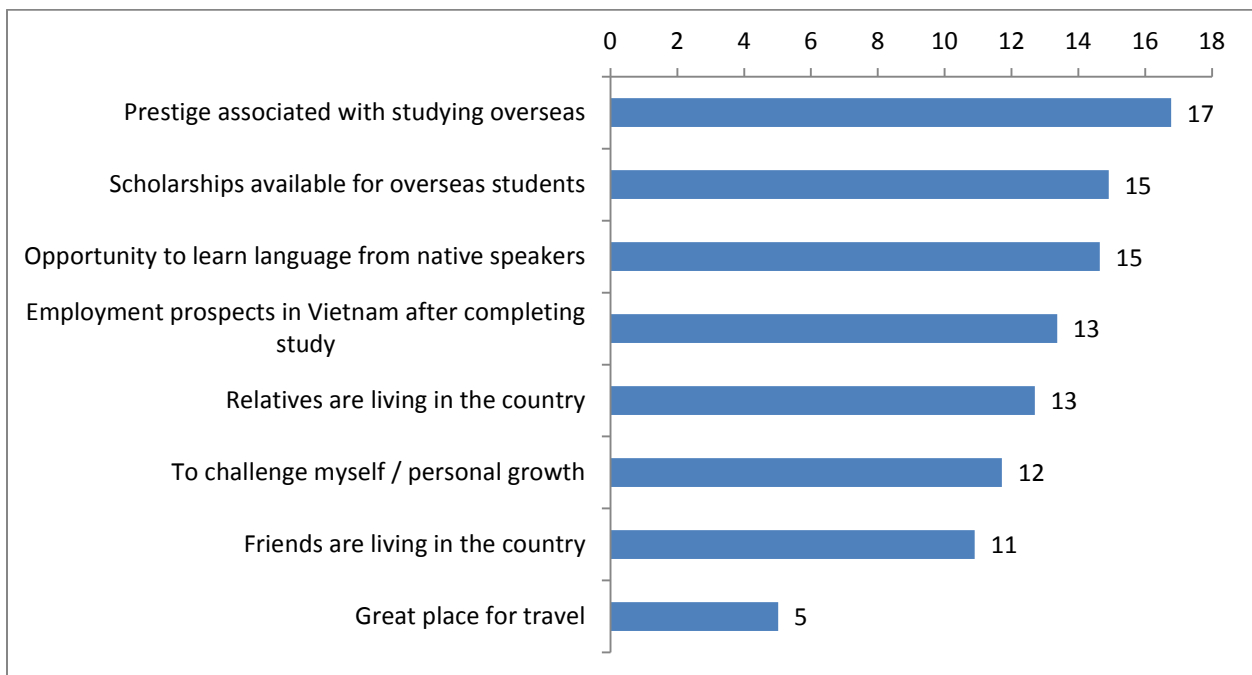
In terms of the country itself, the most important factor was safety of the country followed by “cost of living” and “tuition fee” (Figure 19).

Figure 19: Ranking influential factors in terms of the country itself



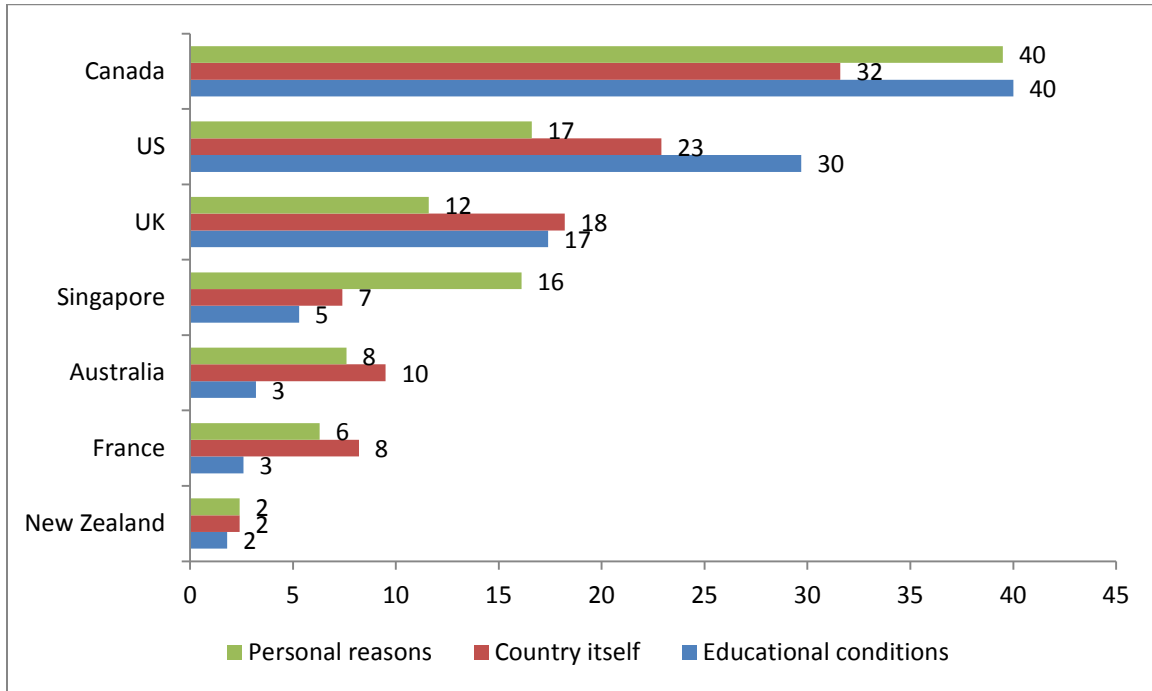
When asked to indicate personal reasons for wanting to study abroad, respondents ranked “prestige associated with studying overseas” highest (Figure 20). Face is clearly playing a role, where a more prestigious degree contributes to personal status as well as providing greater employment opportunities. Factors such as “personal growth”, “opportunity for travel” or “friends also living in the country” are not strong motivators for overseas study – in stark contrast to what might be observed in a Western market.

Figure 20: Ranking influential personal factors



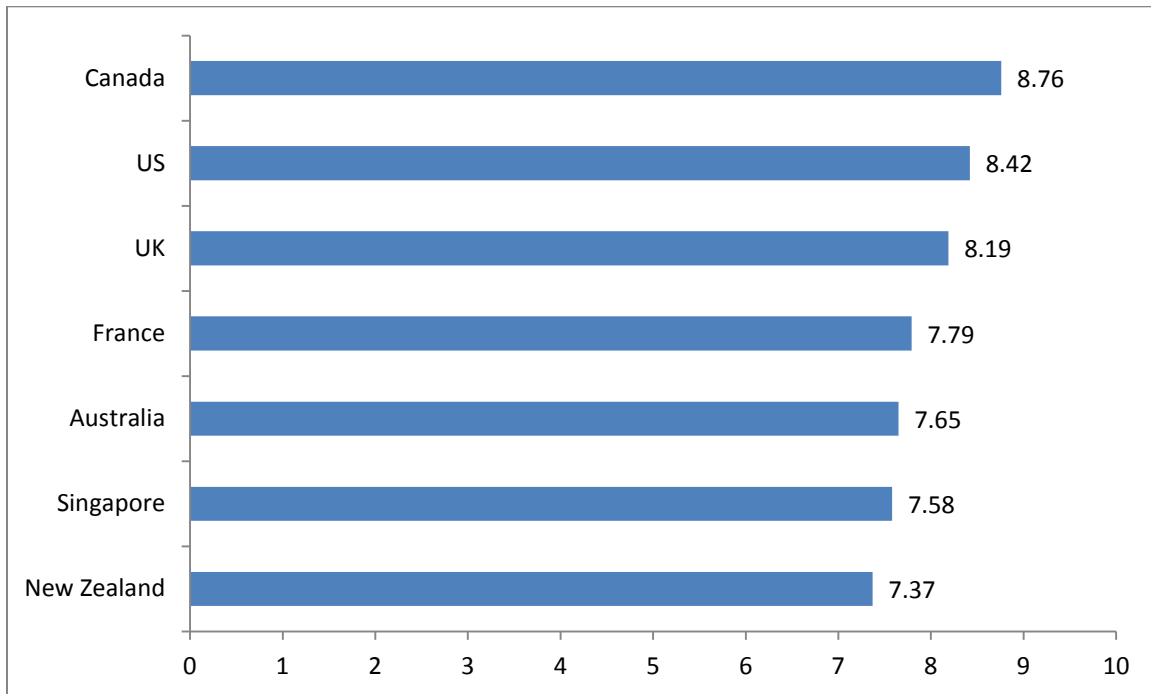
For overall educational conditions, in terms of the country itself and personal reasons, Canada gained first rank, followed by the US and UK (Figure 21).

Figure 21: Ranking countries in term of educational conditions, country itself and personal reasons (first rank)



Canada also gained the highest score and ranking position for quality of education (Figure 22).

Figure 22: Average score for quality of education (10 point scale)



Tuition Fees and Cost of Living

According to agents in TNS qualitative study, due to the high exchange rate of the Australian dollar, studying in Australia is seen as the most expensive option. The next most expensive are considered to be the US and the UK. Given studying in the UK only takes 1 year at the Masters level and 3 years for the undergraduate level, the total amount of study investment in the UK is considerably cheaper than Australia.

Interestingly, even though Canada is near the US, according to agents and stakeholders, studying in Canada is seen as relatively affordable (with only CAD 20,500 per year for both tuition fee and living expense). However, with limited information about tuition fees and living cost, there are still many people hesitant to consider Canada.

Scholarships

While scholarships are among the key factors that affect choices of study destinations, there are few scholarships offered by the Canadian government, provincial/territorial governments and institutions for Vietnamese students compared to those granted from Australia, the UK and the US. This puts Canada at a disadvantage in this market. The three most prominent scholarship programs are the Canadian Francophone Scholarship Program, Vanier Canada Graduate Scholarships Program, and Banting Postdoctoral Fellowships Program, however, as the two latter scholarship programs are open to both Canadians and international students from all over the world, they are less popular and too competitive for most Vietnamese applicants compared to those offered by other countries.

CONTACTS

Consulate General of Canada

Tu Nguyen

Trade Commissioner | Déléguée commerciale

235 Dong Khoi, # 1002, D.1

Ho Chi Minh, Vietnam

T: (84-8) 3827-9913

F: (84-8) 3827-9935

E: tu.nguyen@international.gc.ca; education-vietnam@international.gc.ca

W: www.tradecommissioner.gc.ca

Vietnam International Education Development (VIED)

Ministry of Education and Training

Dr. Nguyen Xuan Vang

Director General

21 Le Thanh Tong Street, Hoan Kiem District

Hanoi - Vietnam

Tel: (84-4) 3995-6899; 3933-5831

Fax: (84-4) 3933-5491

E-mail: vang@vied.vn

W: www.vied.vn

Mekong 1000 Project

Can Tho University

Campus 2, 3/2 Street, Can Tho City

Tel : (84) 710-383-1530

Mr. Pham Xuan Binh, Manager of Mekong 1000 Project

Email: pxbinh@ctu.edu.vn

ECV 1000 Project

Vietnam National University, Ho Chi Minh City (VNU-HCMC)

Quarter 6, Linh Trung, Thu Duc, HCM

Professor Le Quang Minh, Vice President

Tel: (84-8) 3724- 2160

F: (84-8) 3724- 2198

E-mail: lqminh@vnuhcm.edu.vn

Project 165 Administration Office

59 Phan Dinh Phung, Ba Dinh, Hanoi

Mr. Nguyen Ngoc Thanh

Sector Head, International Education and Training Collaboration sector

Ms. Vu Thu Hang, Expert

Tel: (84) 80-45322

Fax: (84) 80-44154

E-mail: hang165@gmail.com

www.vp165.vn

Danang Centre for Promotion of Human Resources Development (CPHUD) – 922

32 Phan Dinh Phung, Hai Chau District, Danang City

Mr. Nguyen Van Chien, Vice Director

Tel: (84-511) 370-7111

Fax: (84-511) 383-0111

E-mail: chiennv-cphud@danang.gov.vn

www.cphud.danang.gov.vn

Hai Phong 100 Project Office

Personnel Board of Hai Phong City

128 Lach Tray, Hai Phong City

Tel: (84-31) 364-1117

Fax: (84-31) 803-1147

Mr. Dang Manh Hung, Chief Office of Project 100

E-mail: hung_dangmanh@yahoo.com or hpproject100@gmail.com

<http://dean100hp.com>

Please ask the Consulate for other local contacts.

Useful Internet Sites

www.tradecommissioner.gc.ca

www.vietnam.gc.ca

APPENDICES

Appendix 1: List of Target Public Secondary Schools

School	Foreign Language(s)
Ho Chi Minh City	
Pho Thong Nang Khieu – Dai Hoc Quoc Gia TP.HCM (High school for the gifted – Vietnam National University – HCMC)	English
Tran Dai Nghia High School	English
Le Hong Phong High School	English + French
Le Quy Don High School	English
Bui Thi Xuan High School	English
Nguyen Thi Minh Khai High School	English + French
Marie Curie High School	English + French
Danang	
Le Quy Don High School for the gifted	English + French
Hoang Hoa Tham High School	English + French
Phan Chau Trinh High School	English + French
Hanoi	
THPT Chuyen Ngoai Ngu – DHQG Hanoi (Foreign Language Specialized School – University of Languages and International Studies, Vietnam National University - Hanoi)	English, Russian, French, Mandarin, German, Japanese
Hanoi Amsterdam High School	English + French
Chu Van An High School	English + French
Tran Phu High School	English
Viet Duc High School	English

Students have to either pass a very competitive entrance exam or get very high grades on their secondary graduation exam in order to be accepted to the top public high schools in Vietnam. Curriculum is based on the program of the Ministry of Education and Training. Some top schools offer additional specialized curriculum for gifted students. Many students at these top public schools win prizes in international competitions on various subjects. These public high schools always achieve high percentage of high school graduation and acceptance to local universities. Many students have good command of English. A large percentage of students from these schools tend to study abroad as early as at grade 10 or after grade 12.

Appendix 2: List of Target Private Secondary Schools

School	Foreign Language(s)	Website
Ho Chi Minh City		
APU International School	English, Mandarin, French	www.apu.edu.vn
Asia Pacific College	English	www.apc.edu.vn
Horizon International Bilingual School	English	www.hibsvietnam.com
The Asian High School - AHS (part of The Asian International School - AIS)	English	www.asianschool.edu.vn
The International School	English	www.tis.edu.vn
Vietnam Australia International School	English	www.vas.edu.vn
Hanoi		
Doan Thi Diem High School	English + French	www.thptdoanthidiem.edu.vn
Lomonoxop Private High School	English + French	www.lomonoxop.edu.vn
Nguyen Sieu Private High School	English	www.dlnguyensieu-hanoi.edu.vn

These private schools use a combination of their own curriculum and that of the Ministry of Education and Training, with intensive English training and English is the main teaching/learning language. These schools have good facilities for their curricular and after-school activities as well as athletic programs. A majority of students from these schools will study abroad after grade 12, but some study abroad as early as at grade 8.

Appendix 3: List of Target International Secondary Schools

School	Foreign Language(s)	Website
Ho Chi Minh City		
ACG International School Vietnam	English	www.acgedu.com/vn
American International School	English	www.ais.edu.vn
Australian International School	English, Chinese	www.aisvietnam.com
Canadian International School (Ontario curriculum)	English + French	www.cis.edu.vn
British International School	English	www.bisvietnam.com
British Vietnamese International School	English	www.bvisvietnam.com
International School of Ho Chi Minh City	English	www.ishcmc.com
Renaissance International School Saigon	English, French, Chinese, Korean	www.rissaigon.edu.vn
Saigon South International School	English	www.ssis.edu.vn
Hanoi		
British Vietnamese International School	English	www.bvisvietnam.com
Hanoi Academy	English	www.hanoiacademy.edu.vn
Hanoi International School	Korean, English, French	www.hisvietnam.com
Lycée Français Alexandre Yersin	French	www.lfay.com.vn
United Nations International School (UNIS)	English, Spanish, Swedish, French, German	www.unishanoi.org
Vietnam – Australia School, Hanoi	English	www.vashanoi.edu.vn
Wellspring International School	English	www.wellspring.edu.vn

While most international schools apply the International Baccalaureate (IB) Diploma Program, some use their own curriculum (non-Vietnamese programs). Most students are children of expatriates living in Vietnam. These schools have good facilities for their curricular and after-school activities as well as athletic programs. Almost all students at these international schools choose to study abroad while studying or upon high school graduation.