

2. Southeast Asia

Status of Japanese-language education in Southeast Asia

The number of institutions in Southeast Asia overall is 5,001 institutions (down 7.2% compared to the previous (fiscal 2018) survey), the number of teachers is 17,343 people (down 8.0% compared to the previous survey), and the number of learners is 1,185,375 people (down 2.5% compared to the previous survey), so all of these figures have decreased compared to the fiscal 2018 survey.

The country with the largest number of institutions is Indonesia (2,958), followed by Thailand (676) and Vietnam (629). The order for the number of teachers is Indonesia (6,617 people), Vietnam (5,644 people), and Thailand (2,015 people), while the order for the number of learners is Indonesia (711,732 people), Thailand (183,957 people), and Vietnam (169,582 people). While the order of the rankings is slightly different for the number of institutions, teachers, and learners, the top three countries in each case are Indonesia, Thailand, and Vietnam. The number of learners in Indonesia accounts for 60.0% of the learners in Southeast Asia overall, and the country's share of learners within the region has increased slightly by 1.6 points compared to the previous survey. Looking at the number of learners compared to the previous survey for each country, the number of learners decreased in both Vietnam (down by 2.8%) and Myanmar (down by 46.3%), whereas the numbers of learners in these two countries had significantly increased

in the previous survey. Meanwhile, the 59.5% increase in Laos marks the largest growth rate in the region.

Looking at the percentage by educational stage of the number of learners in the Southeast Asia region, primary education is 1.6%, secondary education is 72.1%, higher education is 10.3%, and non-school education is 16.0%, with results largely unchanged from the previous survey.

The online class implementation ratio in the Southeast Asia region overall was 84.4%, which is high compared to the global implementation ratio (63.1%), with the highest percentages in Southeast Asia recorded by Brunei (100.0%), Vietnam (94.4%), Laos (93.8%), and Thailand (90.4%).

Looking at the objectives of Japanese-language learning, similarly to the results seen for the world overall, the top response was “interest in the Japanese language” (60.5%), with “interest in anime, manga, J-POP, fashion, etc.” coming in second (57.8%). Ranking third was “future work in Japan” (51.6%), which is 17.4 points higher than the worldwide response rate of 34.2%. “Current or future work in home country” (44.4%) was also higher than the global result, albeit only by 3.8 points, revealing that a relatively large number of people in Southeast Asia are pursuing Japanese-language study for work or employment.

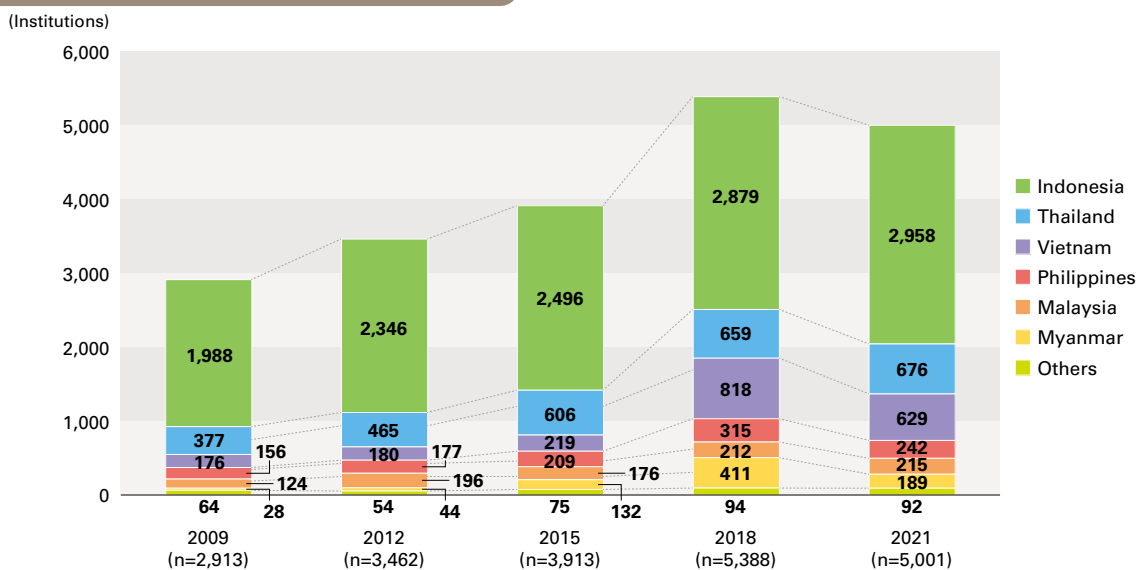
Table 2-2-1 Number of institutions, number of teachers, and number of learners in Southeast Asia

(Listed in order of the number of learners in 2021)

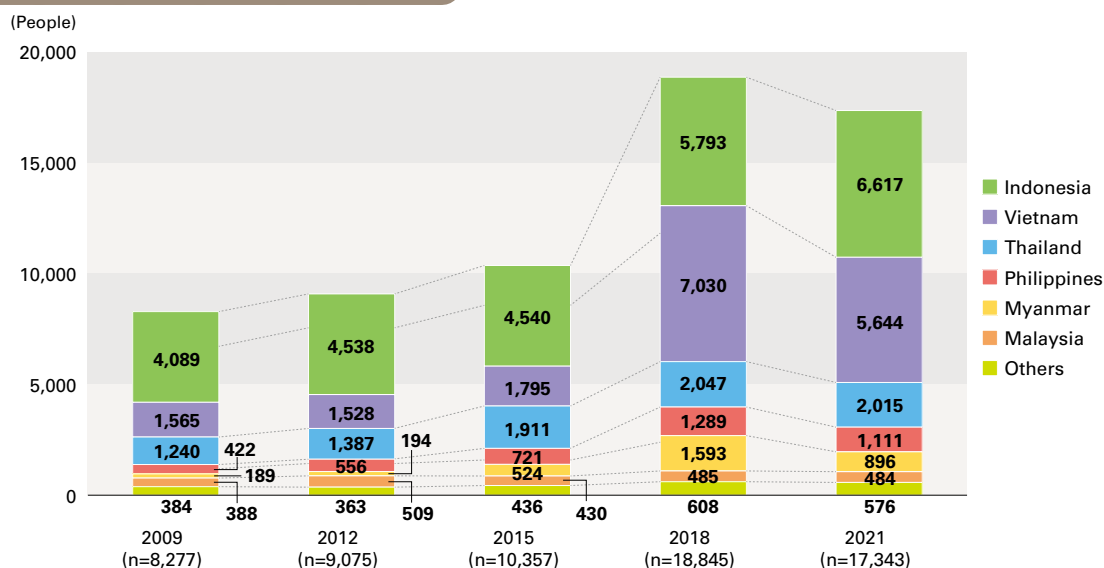
Country and region	2021									Population* (People)	2018		
	Institutions (Institutions)	Teachers (People)	Learners (People)	Learners per 100,000 population (People)	Composition by educational stage (Learners) (People)				Institutions (Institutions)		Teachers (People)	Learners (People)	
					Primary education	Secondary education	Higher education	Non- school education					
Indonesia	2,958	6,617	711,732	263.4	6,786	642,605	27,454	34,887	270,203,917	2,879	5,793	709,479	
Thailand	676	2,015	183,957	278.8	6,597	150,240	19,803	7,317	65,981,659	659	2,047	184,962	
Vietnam	629	5,644	169,582	176.3	3,986	30,590	45,752	89,254	96,208,984	818	7,030	174,521	
Philippines	242	1,111	44,457	40.8	640	9,220	9,181	25,416	109,035,343	315	1,289	51,530	
Malaysia	215	484	38,129	134.6	17	19,140	13,715	5,257	28,334,135	212	485	39,247	
Myanmar	189	896	19,124	37.1	0	0	855	18,269	51,486,253	411	1,593	35,600	
Singapore	19	182	10,837	268.0	384	1,313	3,226	5,914	4,044,210	19	221	12,300	
Cambodia	51	301	3,874	25.3	216	442	918	2,298	15,288,489	51	307	5,419	
Laos	16	74	3,118	48.0	422	1,555	369	772	6,492,228	16	58	1,955	
East Timor	4	16	417	35.2	0	0	100	317	1,183,643	6	17	651	
Brunei	2	3	148	34.4	0	0	130	18	429,999	2	5	171	
Southeast Asia overall	5,001	17,343	1,185,375	-	19,048	855,105	121,503	189,719	-	5,388	18,845	1,215,835	

*Source: *Population and Vital Statistics Report (as of 3 June 2022)*, by United Nations

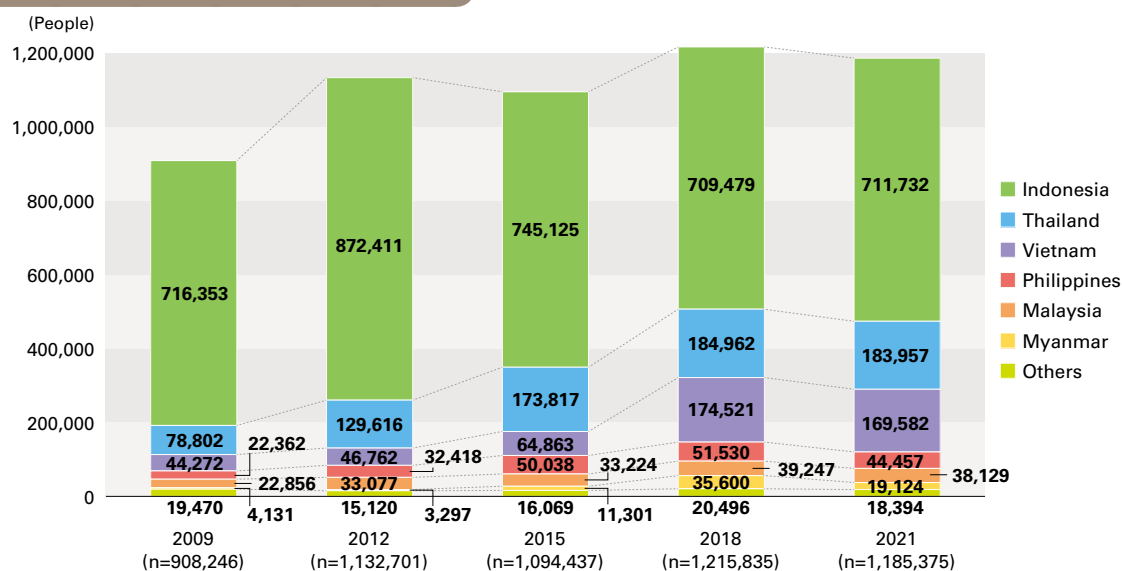
Graph 2-2-1 Number of institutions in Southeast Asia



Graph 2-2-2 Number of teachers in Southeast Asia



Graph 2-2-3 Number of learners in Southeast Asia



Graph 2-2-4 Percentages of learners by educational stage in Southeast Asia

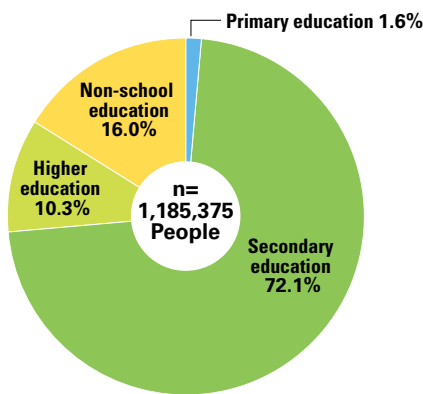
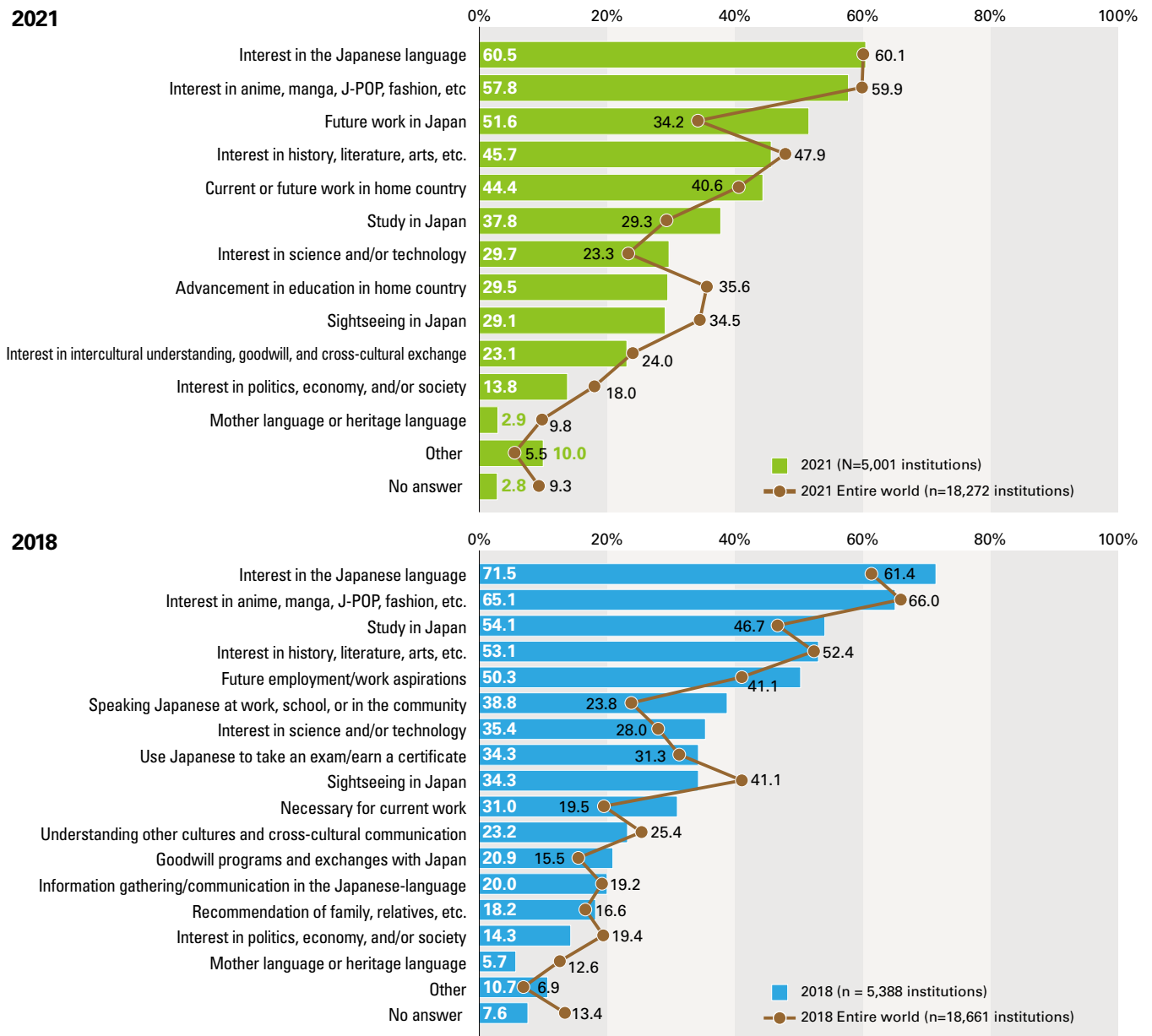


Table 2-2-2 Online class implementation ratio in Southeast Asia

Country and region	Total number of institutions in the country and region	Online class implementation	
		(Institutions)	(%)
Indonesia	2,958	2,405	81.3
Thailand	676	611	90.4
Vietnam	629	594	94.4
Philippines	242	212	87.6
Malaysia	215	185	86.0
Myanmar	189	139	73.5
Cambodia	51	43	84.3
Singapore	19	16	84.2
Laos	16	15	93.8
East Timor	4	1	25.0
Brunei	2	2	100.0
Southeast Asia overall	5,001	4,223	84.4

Graph 2-2-5 Objectives of Japanese-language learning in Southeast Asia



Trends in each country

[Indonesia]

Indonesia, which continues since the previous survey to have the second greatest number of learners in the world, saw an increase in the number of Japanese-language learners in the current survey, whereas the number had decreased in the previous survey. This is primarily due to the number of learners affiliated with non-school educations increasing at the high rate of approximately 50% compared to the previous survey.

Behind this increase is the established case of people in Indonesia pursuing short-term Japanese-language learning in order to come to Japan using the technical internship system, and with the establishment of a new residency status for Japan in April 2019, the Specified Skilled Worker (SSW) visa, the trend has become more pronounced. In the category of non-school education, the number of learners has increased despite travel to Japan no longer being possible due to the COVID-19 pandemic, and while the scale is small in comparison to provinces such as those on the island of Java, there are also learners in island areas, and as such their future growth potential is something to keep an eye on.

On the other hand, when looking at the educational stage, the number of institutions, teachers, and learners in secondary education, which accounts for 90% of Japanese-language learners in Indonesia, have continued to decline since the previous survey. Due to the revision of the educational curriculum in 2013, studying a second foreign language, which had been a compulsory subject, became an elective subject, and the number enrolled in Japanese-language classes has been decreasing ever since. However, the decline in the number of learners has been slowing, with a smaller decrease each time the survey is conducted. This is thought to be because while there have been many cases of Japanese-language classes being abolished at general high schools, many vocational high schools have adopted Japanese-language education, which is reducing the decline in learners. Meanwhile, the COVID-19 pandemic forced nearly all schools in Indonesia to suspend in-person classes for a time. As online learning environments were not in place, particularly in rural areas, there were cases in which Japanese-language classes were also temporarily suspended.

The spreadsheets for survey results by province (1-3a and 1-3b) are available on the Japan Foundation website.

[Thailand]

Although there are some increases and decreases, none of the results for Thailand as a whole showed a significant

change compared to the previous survey, with the number of institutions increasing slightly by 17 (up 2.6% compared to the previous survey), and the number of teachers decreasing slightly by 32 people (down 1.6% compared to the previous survey) along with the number of learners by 1,005 people (down 0.5% compared to the previous survey). As for the number of learners by educational stage, while primary education and secondary education increased, higher education and non-school education decreased, with no change in increasing or decreasing trends from the previous survey.

Primary education is not a very large proportion of Japanese-language education in the country overall, but the number of institutions and learners are increasing, and similarly to the last survey, the steady increase stems from institutions such as international schools and university-affiliated primary schools, etc. that provide education in a second foreign language in addition to English in early childhood. In secondary education, which accounts for over 80% of the number of learners in the country overall, the rate of increase has slowed but the increasing trend is continuing. On the other hand, all of the items have decreased in higher education, and in particular, the number of teachers has decreased by 52 people (down 12.0% compared to the previous survey) for reasons including Japanese-language teachers who had been active at institutions in Thailand returning to Japan due to the COVID-19 pandemic, which is a more significant change than seen in the number of learners.

In non-school education, the number of institutions and teachers both increased. This is thought to be because of an increase in institutions sending people to Japan through the Specified Skilled Worker (SSW) program and an increase in institutions setting up branch locations in rural areas for people eligible to obtain a SSW visa, among other reasons. On the other hand, the number of learners was confirmed to have decreased, as seen in other countries. The closure of language schools due to the pandemic, the acceleration of remote learning, and the advancement of online learning tools may have driven an increase in learners who are studying without being affiliated with an institution.

As for the provision of online classes, while some cases of schools suspending their operations due to an inadequate online learning environment were seen, Thailand as a whole was confirmed to have an implementation ratio of over 90%.

[Vietnam]

While the fiscal 2021 survey revealed an across-the-

board decline in the three main items, this is due to the significant decrease in the number of institutions (going from 617 institutions to 394 institutions, down 36.1% compared to the previous survey), teachers (going from 6,185 people to 4,560 people, down 26.3% compared to the previous survey), and learners (going from 114,957 people to 89,254 people, down 22.4% compared to the previous survey) in non-school education, which had the greatest rate of increase of all of the educational stages in the previous survey. This was mainly caused by many institutions having to close or temporarily suspend classes because of the COVID-19 pandemic, as the primary objective of a large number of learners at many non-school institutions for Japanese-language education is to work or study in Japan.

On the other hand, the number of institutions, teachers, and learners in school education all showed an increase. Looking at the results by educational stage, the introduction of Japanese as a first foreign language in primary schools on a trial basis, which began in 2016, came to an end in 2019. Although the number of elementary schools offering Japanese-language education as a first foreign language decreased with the end of the trial phase, the number of private schools offering Japanese independently has increased. In secondary education as well, Japanese-language education as a first foreign language began in 2005, and Japanese has become an established part of the secondary education curriculum with the announcement of the “Japanese as a second foreign language curriculum” in 2018. As for higher education, in addition to the provision of Japanese-language education not only in faculties of the humanities, but at universities and faculties for long-term care, nursing, science and engineering, and tourism, as seen in the previous survey, there was also an increase in universities and junior colleges that offer Japanese-language education for the purpose of employment in Japan. The number of learners in higher education increased the most in the school education category, as the size of each institution has grown and the size of the faculties and classes has increased accordingly. One of the factors driving the increase in the number of learners in school education is thought to be the strong and favorable relations between Japan and Vietnam that have continued since the previous survey.

Online classes are being implemented in Vietnam overall at the high ratio of over 90%.

[Philippines]

While the number of institutions, teachers, and learners all decreased in the country overall, the decrease observed in school education and in non-school education differed

in terms of the numbers.

Looking first at school education, the number of institutions decreased by 37 (down 24.8% compared to the previous survey) along with the number of learners, which decreased by 7,096 people (down 27.1% compared to the previous survey). As a result of in-person classes not being held for over two years based on the guidelines set by the Department of Education in March 2020, along with strict enforcement of curbs on attendance, the number of institutions and learners have fallen sharply. At the time the survey was conducted, it was confirmed that several institutions had suspended Japanese-language classes due to the COVID-19 pandemic. Meanwhile, although the implementation ratio for online classes in school education was an average of 88.4%, there are considerable regional and individual disparities in the development of the IT environment, in addition to many cases in which natural disasters disrupted internet access, resulting problems in widening gaps in learning effectiveness among learners and delayed progress in learning.

On the other hand, in non-school education, the number of institutions decreased by 53 (down 26.6% compared to the previous survey), but the number of learners increased by 23 people (up 0.1% compared to the previous survey), in other words largely unchanged. By item, the number of institutions decreased as a result of the COVID-19 pandemic, particularly small Japanese-language schools which closed down or suspended their operations due to the ensuing financial difficulties. This did not lead to a decrease in the number of learners, however, as online classes were introduced quickly in the Philippines, and in many cases it was possible to resume some in-person classes at an early stage. In addition, the introduction of online classes has made it possible for learners in regions where there were no Japanese-language schools to begin studying at schools in other regions.

[Malaysia]

There was no major change in the number of institutions or the number of teachers, which increased by 3 institutions (up 1.4% compared to the previous survey) and decreased by 1 person (down 0.2% compared to the previous survey) respectively, but the number of learners decreased slightly by 1,118 people (down 2.8% compared to the previous survey).

Looking at the results by educational stage, there was a particularly large decrease in the number of learners in higher education, which fell by 1,005 people (down 6.8% compared to the previous survey). This is due to online classes becoming the mainstream for a long time from the standpoint of preventing the spread of COVID-19 (at the

time when responses to the current survey were collected, the online class implementation ratio at institutions of higher education was 100%), the fact that class sizes were set to be smaller than in-person classes in some cases in order to ensure the learners' quality of learning, and some learners avoided online learning for reasons including issues with the IT environment.

In secondary education, the number of institutions increased by 5 and the number of teachers increased by 6 people. In fiscal 2019, the Japanese-language teacher training program conducted by the Malaysian Ministry of Education was resumed for the first time in around six years. While many of the teachers who did their training in the early years of the program, which was launched in 1990, will retire in the next few years, the number of institutions offering Japanese-language education is expected to remain at the current level, even though it is unlikely to grow significantly.

Meanwhile, non-school education saw the only increase in the number of learners (increasing by 192 people, up 3.8% compared to the previous survey) as there were more options for learning, including Japanese-language courses offered as online courses by private-sector language schools and other institutions that had previously only conducted in-person classes.

[Myanmar]

When the fiscal 2018 survey was conducted, the number of institutions, teachers, and learners had all increased significantly in Myanmar against a backdrop of Japanese companies entering the local market. However, the results for the current survey have reversed course across the board for reasons including the COVID-19 pandemic and social destabilization, with a steep drop in the number of institutions (going from 411 to 189 institutions, down 54.0% compared to the previous survey), the number of teachers (going from 1,593 to 896 people, down 43.8% compared to the previous survey), and the number of learners (going from 35,600 to 19,124 people, down 46.3% compared to the previous survey).

In the category of non-school education in particular, which accounts for over 90% of the learners in Myanmar, the number of institutions was reduced by half, as a large number of private-sector institutions for Japanese-language education were forced to close down or temporarily suspend their operations due to measures to prevent the spread of infection such as restrictions on gatherings, social unrest, and other factors. In primary and secondary education, confirmation of implementation of Japanese-language education was no

longer possible for reasons including classes being closed.

In addition, online learning has begun to spread in Myanmar with schools no longer able to hold classes in person, but due to the state of the IT environment and other issues, the online class implementation ratio in the country overall is 73.5%, which is low in comparison to the average of 84.4% for other countries in Southeast Asia.

[Cambodia]

As seen in many countries in Southeast Asia, the number of learners has decreased due to the COVID-19 pandemic. The main factors leading to the decline in secondary education are thought to be rural schools no longer being able to hold classes due to the dispatch of instructors from urban areas being suspended, and the avoidance of online classes. In non-school education, the cancellation of the Japanese Language Proficiency Test (JLPT) three times since July 2020 amidst the continuing inability to travel to Japan and waning motivation to pursue Japanese-language studies have led to a decrease in the number of learners.

On the other hand, although primary education does not make up a large proportion of the learners in Cambodia, some institutions newly offering Japanese-language education at the primary level were confirmed in the current survey.

[Laos]

Thanks to the creation of Japanese-language textbooks through the involvement of Japanese-language specialists dispatched by the Japan Foundation, and the expansion of the target grade levels for Japanese-language classes at schools that have introduced Japanese-language education, the number of learners in secondary education increased by 770 people (up 98.1% compared to the previous survey). The number of learners in other stages of education increased as well, with employment at Japanese companies providing motivation for learning, and the country as a whole saw an increase in learners by 1,163 people (up 59.5% compared to the previous survey).

On the other hand, the number of teachers only increased by 16 people (up 27.6% compared to the previous survey), and there is an issue of teacher shortage, with the number of teachers is insufficient in terms of the number of learners per teacher.

With regard to online classes, a high implementation ratio was confirmed, with 15 of 16 institutions providing them.