

## South East Asia: Malaysia, Singapore, Thailand And Vietnam

July 2020

### Summary

- It is important that Victorian education and training providers remain engaged in the market to secure student pipelines and support long-term market engagement.
- Teacher training, Vocational Education and Training (VET) and transnational education delivery, skills and executive training opportunities remain strong.
- Many SEA markets are currently opening or have already opened for business.
- In some markets, education agents have remained engaged and continue to promote study in Victoria through virtual fairs and online webinars.

### Current Market Status and Coronavirus Responses Across the Region

While Australia has restricted entry for all non-citizens/permanent residents until 2021, many countries in South East Asia (SEA) are currently opening or have already opened for business. This does not mean the pandemic is over, but it is a measure to reduce the long-term economic consequences of remaining locked down. While some markets have opened internally and with travel being encouraged domestically, such as in Malaysia, there is a move to create quarantine free 'travel bubbles' to kickstart economies.

For example:

- Singapore has developed a 'fast track lane' for businesses, investors and consultants from six provinces in China. Singapore is also working with Malaysia to lift border restrictions.
- Thailand is in talks to create travel bubbles between Bangkok and cities in China, Japan, South Korea and Vietnam with the aim of kickstarting tourism.
- Vietnam Air is in the process of finalising two-way flights between Vietnam and South Korea, Japan, Singapore and China to restart the manufacturing sector.
- Indonesia is exploring a travel bubble with China, South Korea, Japan and Australia. At the time of writing, these countries have yet to be approached. It is unlikely this will take place given that rates of infection are high.

### The Education Sector

#### Malaysia

The Malaysian Government conducted classes online, with some challenges at first, and complemented these with OKEY TV classes. It has also rescheduled national exams until November/December 2020, during school holidays. Schools and universities have been closed since 18 March 2020 and remain closed.

## Singapore

Singapore was prepared and had in place the 'Singapore Learning Space' to support teacher and parent transition. Funds were allocated for the procurement of learning devices and with the pandemic contained, schools and universities opened on 2 June 2020, practicing distancing measures monitored by the Government.

## Thailand

The Thai Government changed its first semester to start on 1 July 2020 and moved examinations. It is anticipated that high risk areas will remain online for the rest of the year with the Government expected to support learning with online and educational television programs. According to the National Statistical Office, 98 percent or 20.4 million out of the 21.4 million households in Thailand, have access to television content.<sup>1</sup> Schools are expected to open in July as long as there are no spikes in June.

## Vietnam

Vietnam is now open for business and schools and universities are operating. However, as soon as the Government closed schools and instructed schools to go online, it also rescheduled examination dates. Throughout the pandemic, agents have remained engaged and have continued to run virtual fairs and online webinars.

## **Reasons for optimism**

### Take-up of Education Technology (Edtech)

There is undoubtedly a market in edtech. However, it is important to be aware that after months of studying online, many students do not want to do an entire course online. A high proportion will consider undertaking online units as a means of commencing a course of study, if it leads to in-person delivery.

The preference remains for the in-person learning 'experiences'. Students expect that if the course is conducted online, it will cost at least 20-45 percent less than the cost of an in-person course. Part of the challenge in overturning perceptions associated with Edtech is that it lacks quality, it is not suitable for 'practical' courses and that there is little return for the relatively large cost.

One approach is to explore the development of consortia, consisting of partnerships between local and Victorian edtech providers, education providers and content which will lead to various models of blended learning on and offshore. It is important to note that for schools and institutions that did well in the transition to online processes, that there are opportunities for edtech companies to market for more personalised and innovative models

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<sup>1</sup> <https://www.nationthailand.com/news/30377577>

and methods of presenting content. In addition, there are opportunities for training teachers in pedagogy and information technology.

Given that there is a recession looming, all models need to be price sensitive. Specific opportunities include:

- K-12 schools: (Indonesia, Thailand, Vietnam)
- ELICOS: (Vietnam, Thailand)
- Teacher Training (Malaysia, Thailand, Vietnam)
- VET: (Vietnam)
- Higher education: (Malaysia, Thailand, Vietnam)
- Online tutoring services (Singapore, Thailand, Malaysia)

## Perception of Australia

Victoria is perceived by all markets positively for the quality of its education and inclusive approach to international students. In addition, Victoria is also seen as being welcoming to its international students.

## **Opportunities**

### Malaysia

The pandemic has reinvigorated the Malaysia's desire to become a leader in the education sector. This desire has been brought home by the fact that in addition to its own population, Malaysia has large populations from South Asia, Nepal and neighbouring SEA countries as well as its own students wanting to obtain qualifications that will enable them to transition to Australia, the United Kingdom and the United States of America. Establishing twinning/dual degree or blended learning programs can save government resources in scholarships. To this end, there is interest in establishing higher education programs which can be implemented offshore but have an overseas component and certification.

### Singapore

The main opportunities are in online tutoring for students who are keen to further improve their performance and returning/prospective undergraduate and postgraduate students.

### Thailand

There are significantly large numbers of private schools and universities with varying types of edtech capacity and infrastructure, which was clearly highlighted when schools went online. As a result of the pandemic, many schools have suffered losses in enrolments. A scoping exercise to ascertain the status of many of these schools and where there are opportunities would be beneficial if done with the Private School Associations. One of the

challenges is the cost of foreign owned Edtech, therefore, it is necessary that there are pricing options made available.

There is also the opportunity to deliver ELICOS courses as a means to 'kick start' the tourism and manufacturing sector.

### **Contacts and further information**

Please contact Joanne Hashim, SEA Regional Director for Education Services, at [Joanne.hashim@global.vic.gov.au](mailto:Joanne.hashim@global.vic.gov.au) if you have questions or want to follow up on the information in this update.