



INTERNATIONAL EDUCATION – MARKET DEVELOPMENT PLAN SOUTH EAST ASIA

The Victorian Government's one- to two-year strategic priorities for International Education

MARKET INSIGHTS

- The establishment of the ASEAN Economic Community (AEC) will not only boost the free flow of goods, services and investment, but will also allow skilled workers to move freely in the ASEAN market, which is home to 300 million people of working age.¹
- As part of the AEC, the implementation of the ASEAN Qualifications Reference Framework (AQRF) will enable comparisons of qualifications of skilled labour across ASEAN member states. The framework supports recognition of qualifications, promotes quality of education and learning, and facilitates labour mobility. It addresses all aspects of education and training, including formal, non-formal and informal learning.
- ASEAN member states are at different stages of development, and compliance with the AQRF is voluntary. The referencing process commenced in 2016 and is expected to be completed by 2018.
- Should the Trans-Pacific Partnership Agreement be implemented, Australian universities and vocational providers are expected to benefit from improved market access throughout Brunei Darussalam, Malaysia, Singapore and Vietnam.²

¹ 'ASEAN Community: Managing integration for better jobs and shared prosperity', 2014, *ILO & ADB*, accessed 9/11/2016, www.adb.org/sites/default/files/publication/42818/asean-community-2015-managing-integration.pdf

² 'Trans-Pacific Partnership: Education Outcomes', 2016, *DFAT*, accessed 9/11/2016, <https://dfat.gov.au/trade/agreements/tpp/Documents/outcomes-education-services.pdf>

COUNTRY EDUCATION PROFILES

Malaysia

The *Malaysia Education Blueprint 2015–2025 (Higher Education)* outlines strategies to prepare Malaysia to become a diversified, knowledge-based, high-income economy by 2025. Strong economic growth is helping the government achieve its goals, although the country remains vulnerable to export demand and low oil prices.

Education and innovation are key priorities for the government, which is working to create a highly skilled young workforce. University education is developing rapidly in response to growing demand, while the government is focusing on the importance of technical and vocational education for economic growth. The ambitious agenda of the government is to increase tertiary enrolment from its current 36 per cent to 53 per cent by 2025, which will require an additional 1.1 million places in the system.³

Vietnam

Vietnam has announced a bold new higher education reform agenda, which is set to send 10,000 doctoral students overseas on government-backed scholarships by 2020 as part of Project 911. This scholarship program is just one of many initiatives working towards the government's broader goal of producing a highly skilled workforce and knowledge economy to support Vietnam's continued socioeconomic development. Vietnam's roadmap for human resource development is articulated in its *Socio-Economic Development Plan (SEDP) for 2016–2020*.

Thailand

Thailand has emerged from a period of unrest with a military government and significant changes in policy and governance structures. The unrest has taken its toll on the economy, although growth is expected to strengthen again in the coming years. There has been

a shift in policy towards addressing skills shortages, partly through pre-employment technical and vocational education and training, and partly through programs to enhance the skills of the existing workforce.

Myanmar

Myanmar is seeking to improve its education system and has made its reform a national priority. There is a significant shortage of skilled labour and a huge need for human resources, resulting in a highly competitive hiring market. Private-sector companies with major financial investments are focusing on human capital development, with training and skills development and English language as priorities.

Philippines

One of East Asia's most dynamic emerging markets, the Philippines has experienced continuous economic growth in recent years. The government recognises the fundamental role of education in job creation, enhancing national and international competitiveness, and achieving growth targets. Although the country's growing working population provides a valuable resource, the quality of education and training is not adequately meeting the needs of industry or able to support the developing economy.

Singapore

As the Singapore Government intensifies efforts to promote its *SkillsFuture* policy, Singaporean universities and polytechnics are also accelerating their efforts to build closer relationships with companies through academic–industry partnerships, which allow students to work on industry projects, as well as provide wider placements for internships.

3 *Malaysia Education Blueprint 2015–2025 (Higher Education)*, Putrajaya



VICTORIAN GOVERNMENT STRATEGIC PRIORITIES

1. Support Victorian vocational education and training (VET) providers to respond to opportunities in targeted industries across ASEAN, with a focus on Malaysia and the Philippines

Rationale

Research undertaken by AusTrade indicates that the most viable and sustainable models for Australian transnational engagement in ASEAN is through partnerships with industry where there is capacity to fund training in partnership with an Australian (and where relevant local) training provider.⁴ Victorian vocational education and training providers are well placed to respond to skill gaps within Malaysian industry, which is a focus of the *Eleventh Malaysian Plan*.

Key actions

- Build and strengthen relationships with industry peak bodies and agencies involved in workforce development to understand training needs and position Victorian VET providers to respond to training requirements.
- Target senior representatives involved in workforce development to participate in inbound visit programs showcasing Victoria's approach to skills development and industry engagement.
- Develop collateral profiling Victorian VET capabilities to support emerging opportunities.
- Support providers to work collaboratively to secure high-value offshore projects.
- Develop, strengthen and leverage ASEAN alumni to capitalise on opportunities in a variety of sectors.

Stakeholders

Malaysian vocational education and training providers, industry bodies, Victorian VET providers

2. Showcase Victoria's expertise in governance, quality, teaching and learning to respond to emerging opportunities in the ASEAN community

Rationale

The AEC aims to bring together ASEAN member nations into a single market that is able to compete effectively in the global economy. This will bring new challenges and opportunities within the region's higher education sector.

The implementation phase of the AEC provides an opportunity for Victoria to lead discussions on higher education governance, quality and transnational delivery through formal workshops and forums. The advent of the AEC also offers potential opportunities for the expansion of transnational arrangements across ASEAN countries.

Key actions

- Develop relationships with senior government representatives leading human resource and skill development across the ASEAN member states.
- Support Victorian higher education providers to respond to consultancy, training and partnership opportunities across ASEAN.

Stakeholders

Government representatives from ASEAN member states, universities across the ASEAN region, Victorian universities

3. Develop relationships with relevant government and sector stakeholders to build emerging markets, with a focus on Vietnam

Rationale

With the creation of the AEC and numerous trade agreements and partnerships signed in 2015, Vietnam's outlook is becoming increasingly internationalised and, as a result, so too are its employment and education needs. The government has expanded access to tertiary education, with a focus on improving the quality of graduates. It is also turning its focus towards technical and vocational education, creating opportunities for foreign educational providers in areas such as professional development and language learning.

Key actions

- Undertake research to understand opportunities in Vietnam to support access to and expansion of the market for higher education, VET, English language and other training providers.
- Build and strengthen relationships with government agencies to enable access to government-led projects.
- Support Victorian VET and higher education providers to respond to opportunities by holding strategic events in market.
- Enhance marketing activity through the Study Melbourne campaign at relevant roadshows and events.
- Work with agents in Vietnam to build their expertise in the Victorian education experience, including the depth and breadth of providers, using tools such as MyStory.

Stakeholders

Government ministries and aid agencies across Vietnam, Victorian and Vietnamese VET providers

4. Pursue opportunities that utilise Victoria's expertise in the use of blended and online learning in Malaysia

Rationale

Malaysia aims to achieve higher education enrolments that will be among the highest in ASEAN. The *Malaysia Education Blueprint 2015–2025 (Higher Education)* identifies 10 areas that will encourage continued excellence. One of these is to increase the use of online learning through access to good quality content.

Key actions

- Engage with industry associations to identify opportunities for professional development training.
- Work with niche higher education providers who target mature age learners where blended learning meets lifestyle requirements.
- Seek opportunities to profile Victorian expertise in online and blended delivery, including through the development of collateral and product offerings.

Stakeholders

Victorian providers of online education content, Malaysian training providers and industry

CONTACT

Celia Yeo
Education Services Manager
South East Asia (Kuala Lumpur)
T: +60 3 2055 1506
E: celia.yeo@ecodev.vic.gov.au

Yi Lin Koo
Education Services Manager
South East Asia (Kuala Lumpur)
T: +60 3 2055 1506
E: yilin.koo@ecodev.vic.gov.au

Jaffa McKenzie
Senior Market Development Adviser
International Education
T: +61 3 9651 9709
E: jaffa.mckenzie@ecodev.vic.gov.au