



AIEC 2019
ASEAN - Opportunities & Challenges

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Australian Government
Austrade



EDUCATION LEADS THE WAY

- Almost 9% of world's population 650m
- ~60% of population under 35
- GDP growth of ~5%
- Total exports from Aus \$52 billion
- Education is Australia's largest export to ASEAN \$6 billion
- GDP at current market prices (US\$ trillion) 2.6
- GDP as % of world GDP 3.4
- Urban population (%) 49.0



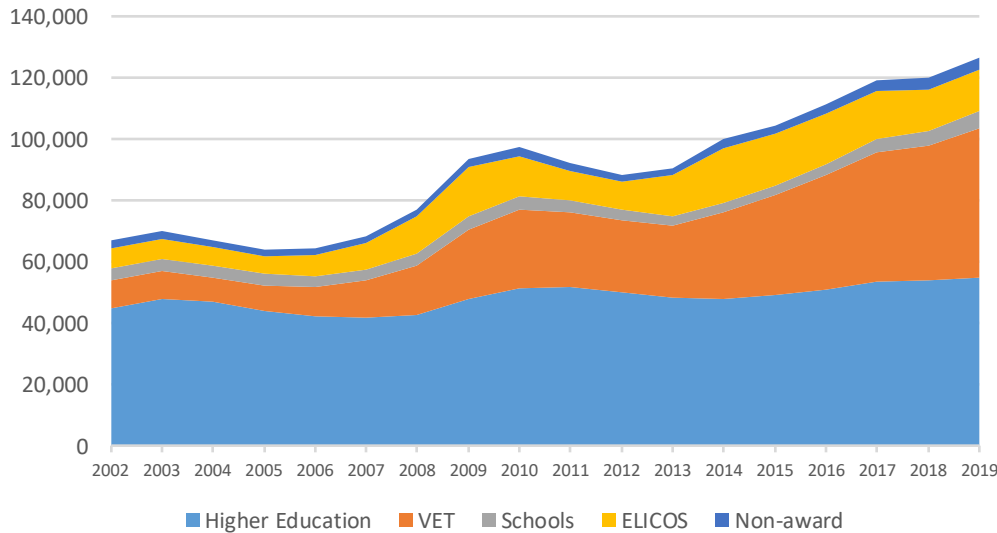
STRONG GOV-TO-GOV FOUNDATIONS

WHAT IS THE ROLE OF BILATERAL AND MULTILATERAL AGREEMENTS?

- TPP – Vietnam, Malaysia, Singapore
 - › new opportunities to establish or expand offshore in Brunei Darussalam, Japan, Malaysia, Mexico and Vietnam;
 - › Malaysia - international schools can be 100 per cent foreign owned;
 - › Vietnam has agreed to a pilot program to provide online courses to Vietnamese students; and
 - › Australian education professionals working at overseas institutions have streamlined visa arrangements and longer periods of stay.
- IA – CEPA
- MAFTA
- SAFTA and CSP
- TAFTA

NEW PATTERNS EMERGING

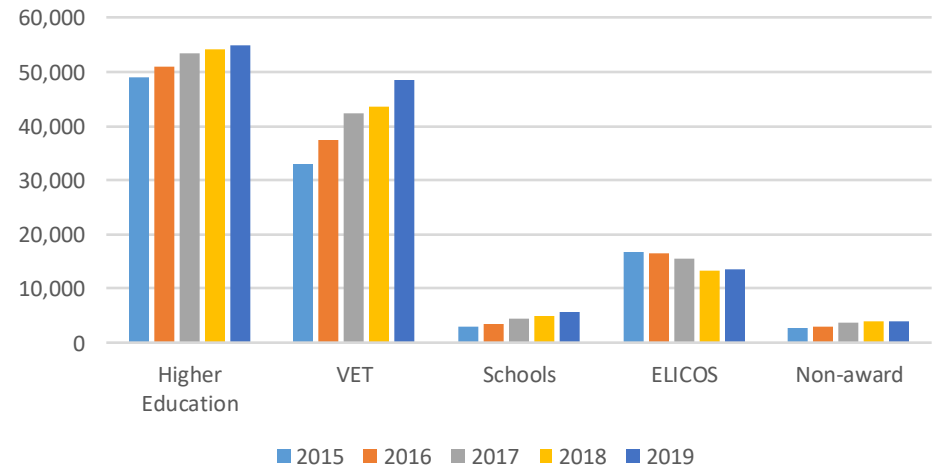
ASEAN Enrolments 2002 – 2019 YTD July



- Long term growth of 90%
 - Driven by VET 428%
 - ELICOS 112%
- Post GFC change in demand profile

- Recent growth driven by VET
- Diploma and Adv Diploma numbers more than doubling
- ELICOS moving offshore
- HE – growth in Education and IT programs

ASEAN Enrolments by Sector YTD July



EDUCATION REFORMS TO DRIVE GROWTH

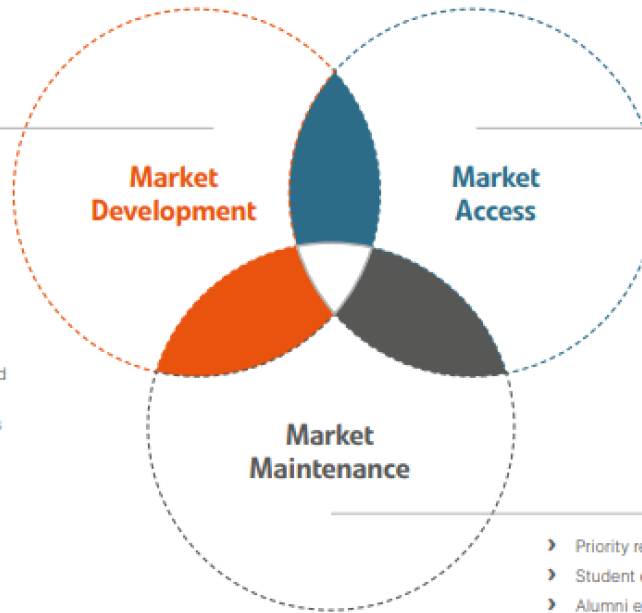
MAJOR FOCUS ON SCHOOLS AND SKILLS

- Indonesia – foreign ownership, labour law reform, target to add 57 million skilled workers by 2030, tax incentives for training and R&D
- Myanmar - National Education Strategic Plan, schools curriculum reform (part funded by Japan International Cooperation Agency)
 - › Myanmar Companies Law, liberalisation of foreign investment
- Philippines – K-12 Reforms, establishment of *Transnational Higher Education Act* (2019)
- Thailand – Industry 4.0, newly established HE and R&D Ministry, consolidation of schools infrastructure,
 - › ‘Thailand Plus’ investment attraction package includes tax deductions for STEM development of staff
- Vietnam – English language tuition, university autonomy, skills & innovation!

MARKETS IN FOCUS – COORDINATION AND DELIVERY



- › Trade missions
- › Ministerial missions
- › Social media and digital campaigns
- › Education agent training and engagement
- › Market research
- › Promotions targeting prospective students and their parents/families
- › Inbound visits and famils
- › Consumer insights



- › Insights and market intelligence
- › Trade agreements
- › Trade events
- › Understanding the policy and regulatory environment
- › Partnerships and capacity building
- › Scholarships

- › Priority relationships
- › Student experience onshore
- › Alumni engagement

RESOURCES

Key events

Oct 2019	<ul style="list-style-type: none"> Philippines HE Roadshow targeting top tier high schools
Dec 2019	<ul style="list-style-type: none"> Tourism & Hospitality mission to Vietnam
Sept 2019 – Jun 2020	<ul style="list-style-type: none"> Agent events and showcases – multi-market
Feb 2020	<ul style="list-style-type: none"> MOE Exhibition and Fair Brunei
Mar 2020	<ul style="list-style-type: none"> Borderless Skills mission – multi market with focus on ICT & Digital Skills, Health (final details TBA) Edu agent business matching - Laos
May 2020	<ul style="list-style-type: none"> Establish an Australia in Indonesia education and training advisory group
Jun 2020	<ul style="list-style-type: none"> Employability seminar - Myanmar



Fintech in ASEAN

Unlock the opportunity



The future of work

It's about lifelong learning



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The future of learning

Open loop university - lifelong learning

From To

Students received four years of college education, front-loaded at the beginning of adulthood.




Students received a lifetime of learning opportunities.




Paced education - not all up front

From To

Structured, 4-year courses of study advanced students by seat hours on a quarterly rhythm.




Three phases of varied lengths provided personalized, adaptive, calibrated learning.




Axis flip

From To

Knowledge within a particular discipline was the criteria for graduation; skill development was secondary.



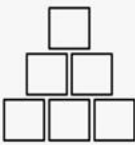
Stanford flipped the axes so that skill development became the foundation.




Missions not majors

From To

Students declared Majors and focused their studies around set requirements.



Students declared Missions and coupled their disciplinary pursuit with the purpose that fueled it.



EdFlix anyone?

EDFLIX

ON DEMAND
EDUCATION



MASTERY



PERSONALISATION



SCALE AND
STACKABILITY



EXCEPTIONAL
LEARNER
EXPERIENCE

coursera

LEARNING
ARCHITECTURE

Considerations

Price

Microcredentials

Badging, certificates, pathways

Teaching model

Assessment

Digital capabilities

Platform, ecosystem

Signature?

On demand

Volume of learning

Model

Network, local meet ups

Cultural learning differences

Time zones



GLOBAL MBA

Future-focused • Stackable • Affordable

Future-focused capabilities



STRATEGISING

- Be competitive
- Be global
- Be disruptive
- Be sustainable



INFLUENCING

- Communicate with impact
- Manage change
- Negotiate & resolve conflict
- Engage the board



LEADING

- Know your people
- Know your organisation
- Adapt your leadership
- Become a meaning maker



ADAPTING

- Your career, your life
- Build personal resilience
- Improve yourself, always
- Become a global citizen



ANALYSING

- Know your numbers 1
- Know your numbers 2
- Generate insights
- Know your customers



PROBLEM SOLVING

- Advise
- Be curious
- Applied immersion 1
- Applied immersion 2