CONTENTS

Market Action Plans 03
Goals and Actions – Indonesia 05
Indonesia Overview 08
Indonesia Growth Opportunities 13
Sector Specific Opportunities 17
Examples of Existing Initiatives 19
How Can You Participate in this Market Action Plan? 21
Market Context 22
About Austrade 25
References 25

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Purpose

The Indonesia Market Action Plan (MAP) is designed to leverage Australia’s quality education and training sector to help Indonesia achieve its education, training and research reform agenda. The MAP builds on the strengths of Australia’s system and identifies how Australian expertise and interests align with Indonesia’s education and industry skills priorities.

This MAP includes a framework of goals and actions that set out how the Australian Government, led by Austrade, will work with states and territories, and Australia’s international education sector.

MAPs provide a platform for greater collaboration to strengthen the position of Australian education in overseas markets. They enable a cooperative focus and aligned effort to maximise impact and benefit for the sector and Australia’s brand. Specifically, benefits include:

› Supporting the market’s education, training and research growth to realise economic, social and cultural benefits for Australia

› Providing a coordinated set of actions across government and sectors to collectively grow brand Australia

› Creating a blueprint for new ways of working in target markets, including through government and sector partnerships

› Leveraging the Collaborative Marketing Framework to inform development and implementation of the plans.

WHAT IS A MARKET ACTION PLAN?

Australian education and training providers are actively seeking new opportunities, both in terms of traditional recruitment and in-market delivery, and those arising from digital and disruptive technologies.

Market Action Plans (MAPs) provide a collective view of opportunities and challenges for Australian education, training and research. They provide shared goals to coordinate government and sector actions in priority markets, to collectively grow brand Australia.

MAPs reflect core objectives of the National Strategy for International Education 2025 and Austrade’s market development roadmap AIE2025. Central to these strategies is the need for government at all levels and the sector to work collaboratively.

This project is funded by the Department of Education and Training under the Enabling Growth and Innovation program and forms part of a broad range of activities underway to ensure Australian education remains globally competitive.
There are various approaches to engagement

Different tools are most effective at different stages of engagement.

- 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 familis
- 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

Measuring success

MAPs provide a platform for increased cooperation and partnerships across governments and the sector. Success will be measured by the extent to which stakeholders collaborate on projects to achieve the goals set out in the MAP. Projects delivered in the context of the MAP will each have clear objectives and performance indicators.

For specific initiatives, success will be measured by the extent to which actions address gaps or priorities, address market failures, and/or introduce new and innovative approaches.

Who was involved in developing this MAP?

A range of Australian education providers from all sectors attended consultation workshops in 2018. Workshops were facilitated by English Australia and the International Education Association of Australia throughout Australia.

Australia’s peak education bodies were also consulted during the development of this MAP. Peaks shared market priorities and planned activities, helping to shape collaborative goals and actions.

Various government departments were involved including:

- The Australian Trade and Investment Commission (Austrade)
- The Commonwealth Department of Education and Training
- The Department of Foreign Affairs and Trade
- State and territory governments and local government agencies responsible for the marketing of international education.
GOALS AND ACTIONS – INDONESIA

Goals and actions

The goals and actions of this MAP were developed through extensive sector consultation. Goals reflect the challenges and opportunities for the market while actions align with the priorities of the Australian Government, states and territories and peak education bodies. Actions include opportunities for onshore and in-market implementation and delivery.

The actions are for implementation throughout 2019-2020. They will be led by Austrade in partnership with sector stakeholders. Implementation will depend on a minimum viable partnerships approach with Australian Government agencies, states and territories, study destination agencies and peaks and providers. A key measure of success for all MAPs is the extent to which governments, peaks and providers work collaboratively on the actions.

A formal review process on the MAP will take place annually.

Specific projects and initiatives undertaken by governments and the sector will be monitored and evaluated against the goals. The MAP is a dynamic document and the opportunity to track progress, and to add new actions as they arise, will be paramount to ensuring continued engagement. To enable this, information about MAP actions and status of projects, including opportunities for stakeholders and partners to add new projects, ideas and plans, will be hosted at:

www.austrade.gov.au/MAPs

In 2019, a key priority for Austrade is to leverage and align Australia’s new Nation Brand when promoting Australia’s education, training, and research excellence. Austrade’s efforts to grow Australia’s engagement with Indonesia will occur in the context of the Nation Brand strategic framework and narrative. Australia’s Nation Brand will help drive our competitive edge in international markets. A consistent and overarching Nation Brand will complement and reinforce state and territory, study destination and education institution marketing and promotion activities.

Goal 1: Strengthen Australia’s knowledge and capability

Austrade will inform the sector with market information and insight to strengthen Australia’s capability and position in Indonesia.

Through biannual workshops with international education agents, Australian Government officers in Indonesia will continue to develop insights on the activities of Australia’s key competitors. Insights gathered through the workshops will be disseminated to the Australian education sector. Austrade, through its network, will continue to review in-market training demand and skills-gaps by sector and region.

To support market entry for Australian providers, Austrade will continue its work in developing guides on doing business, sharing news, insights and market information, holding events and programs in market. The Indonesia-Australia Comprehensive Economic Partnership Agreement (IA-CEPA) will put a spotlight on Australia and Indonesia – accordingly, Austrade will make available a suite of resources for the sector to build understanding on the Agreement.

Action 1.1

An Australia in Indonesia Education and Training Advisory Group will be established to work across government, industry and training and service providers to share information and facilitate opportunities for in-market collaboration, including developing consortia to respond to opportunities at scale.
Action 1.2
We will continue to provide tailored support for new market entrants to Indonesia, as well as for existing clients, including those who are already operating in the market.

Goal 2: Grow recruitment channels
Across government agencies, Austrade will work with key influencers to promote Australia’s education, training, and research excellence.

We will support two-way mobility, and promote the establishment of mutually beneficial partnerships between Australian and Indonesian education providers.

We will continue to engage with education agents in Indonesia through briefings and events. We will also promote inbound education agent familiarisation tours with education agents from Indonesia.

Through existing and new communication channels, including the Study in Australia website, the Australian education attributes identified in Austrade’s Strategic Messaging Framework will be promoted to key decision makers and influencers.

We will continue to position Australia as the world’s number one destination for students from Indonesia and support increased enrolments in regional Australia.

Action 2.1
We will develop and implement a new education agent briefing package in Indonesia in the first half of 2019.

Action 2.2
In the second half of 2019, we will develop and deliver a cross-sector social media campaign highlighting key Australian attributes, aligned with prospective student and parent decision drivers.

Action 2.3
We will create updated collateral to showcase Australian vocational education delivery and service capability, targeting priority sectors for Indonesia’s economic growth. As part of the Strategic Messaging Framework, Austrade will develop a vocational education extension to ensure up-to-date and market-relevant information about Australia’s expertise is shared.

Action 2.4
We will share experiences and case studies of Australian providers who have delivered or are delivering Australian education and training in Indonesia across all sectors.

Goal 3: Promote Australian education and training capability
Austrade will develop more innovative partnerships and transnational education programs by promoting Australia’s education and training excellence.

We will help Indonesia lift its productivity and economic growth and promote greater cooperation in education and training between Australia and Indonesia.

We will actively showcase Australian capabilities, including at events such as the International Conference on Sustainable Tourism Management, which will be held in Bali in 2019. We will explore the feasibility of establishing a framework for Australian vocational education and training providers to work collaboratively with Indonesian partners in key sectors of skills demand.

Action 3.1
In collaboration with stakeholders in Indonesia, we will develop an Industry Skilling initiative. The initiative will conduct market analysis to identify sustainable market entry options for Australian providers, including capacity building projects and potential consortia opportunities to pursue large scale projects.
Goal 4: Promote Australian innovative capability

Austrade will strengthen academic-industry linkages in emerging and enabling sectors in Indonesia.

We will strengthen academic-industry linkages and promote research and development opportunities in emerging and enabling sectors in Indonesia (e.g. smart cities, logistics, agritech, and cyber security). We will also increase Australia’s role in teacher training, English language and executive programs.

Action 4.1

We will deliver a skills mission in 2019, encompassing engagements with government, key allies in-market, agents, corporates, institutions, and other potential partners.

Action 4.2

We will promote Australia’s excellence in teacher training to deliver in-market English language courses aligned with industry demand.

Goal 5: Build and leverage Australia and Indonesia’s government to government relationships

Austrade, working with the Department of Education and Training, will continue to identify and pursue opportunities for mutual benefit.

We will continue to promote Australia’s diverse university options, including in regional areas, and innovative capabilities to Indonesian Government scholarship agencies.

Action 5.1

We will promote Australia’s online education offerings including through an online education pilot program.

Action 5.2

We will support annual visits to Australia from key Indonesian scholarship agencies to increase awareness by Indonesian Government officials of the breadth of Australia’s education, training and research excellence.

Goal 6: Continue to implement the Alumni Engagement Strategy Indonesia 2016-20

Austrade, working with DFAT, will continue to engage and leverage key alumni segments to help facilitate access for government and the sector.

We will strengthen ongoing links between Australian alumni and sectors/industries and support business initiatives. We will provide regular opportunities for alumni to engage, for example through professional development opportunities, social media platforms, networking events, and the alumni grant scheme.

Action 6.1

We will deepen linkages between New Colombo Plan Alumni Ambassadors and Indonesian Australia Awards scholars by facilitating connections and engagement onshore.
Strong economic growth in Indonesia is driving increased demand for quality education. As Indonesia’s economy grows, its education and skills needs are diversifying. Currently, industry demand for quality training is unable to be fully met by local providers. Skills shortages exist in industries that are important to Indonesia’s continued economic development. These include industries that align with Australian expertise in skills development.

In 2018 there were 20,895 onshore enrolments in Australia by students from Indonesia across all sectors.

<table>
<thead>
<tr>
<th>Sector</th>
<th>2015</th>
<th>2018</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Higher Education</td>
<td>8,469</td>
<td>9,883</td>
<td>16.7%</td>
</tr>
<tr>
<td>VET</td>
<td>8,190</td>
<td>8,675</td>
<td>5.9%</td>
</tr>
<tr>
<td>Schools</td>
<td>223</td>
<td>213</td>
<td>-4.5%</td>
</tr>
<tr>
<td>ELICOS</td>
<td>1,733</td>
<td>1,263</td>
<td>-27.1%</td>
</tr>
<tr>
<td>Non-award</td>
<td>644</td>
<td>861</td>
<td>33.7%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>19,259</strong></td>
<td><strong>20,895</strong></td>
<td><strong>8.5%</strong></td>
</tr>
</tbody>
</table>
Despite Indonesia’s economic growth and emerging middle-class, onshore student enrolments in Australia have only grown by 8.5 per cent since 2015, and are only now in 2018 reaching the peak recorded in 2002 (21,000). Higher education is the most popular education sector for Indonesian students in Australia.

New South Wales (NSW) has the largest share of Indonesian enrolments with over 50 per cent in 2018. This is driven predominately by NSW share of VET enrolments, which amounts to 79 per cent of Australia’s total VET enrolments from Indonesia. Victoria has 33 per cent share of total enrolments, followed by Western Australia with 5.6 per cent and Queensland with 5.4 per cent.

Of Indonesia’s 9,883 higher education enrolments in 2018, almost half (48.5 per cent) were at Group of Eight universities.
The Indonesian Government recognises that economic growth aspirations need to be supported by reform in education, training and research. National priorities include improving the quality of vocational and higher education, increasing student and academic mobility, and commercialising research.

Career success is a key factor driving student choice in Indonesia. Students expect more experiential learning opportunities such as internships, volunteering and other professional development.

With 1 in 3 people aged under 18 years, and half its population aged under 30, Indonesia is looking to maximise the benefits of its demographic dividend, including through increased access to globally relevant education and training.

Opportunities exist across all education sectors.

- There is a focus on improving the quality of schools.
- There is demand for in-market English-based training, particularly around key growth industries such as tourism and hospitality.
- Indonesia’s Government has identified the need for an industry-responsive VET system.
- Indonesia is looking to enhance the quality of its higher education and research through stronger industry links and internationalisation.
- There are opportunities to diversify field of study and level of qualification for onshore students from Indonesia.
- Management and Commerce courses account for around half of all enrolments from Indonesia. This presents opportunities to raise awareness in Indonesia, of Australia’s excellence in the delivery of alternative fields of study such as Science, Technology, Engineering and Maths (STEM) – priority fields for Indonesia’s Government.
- There are opportunities to diversify higher education levels of study. Postgraduate coursework and higher degree by research studies could be encouraged through stronger links with Indonesian Government scholarship providers.
- There are opportunities to diversify vocational certificate and diploma programs in priority areas for Indonesia’s industry and government.
- Opportunities to grow English language and degree pathway programs exist. Only 30 per cent of higher education and 40 per cent of VET students from Indonesia complete pathway courses in Australia. This compares with 44 per cent (higher education) and 50 per cent (VET) for all other international students.

Indonesia’s fintech and edtech sectors are growing and the digital economy is open to international business. Indonesia’s rapid digital transformation makes it a cost effective, high impact market for digital marketing. Notwithstanding this, digital marketing of high-cost services such as international education must be complemented by face-to-face engagement. Success in this market requires strong on-the-ground relationships.

In Indonesia, an overseas education is seen as a way of developing life skills such as independence, resilience and self-management. As such, drivers encompass more than financial and career related returns. Extended family, friends and alumni are very influential in deciding where to study.

Indonesian students and young people are often very entrepreneurial. The Government of Indonesia is keen to ensure graduates obtain the skills to succeed in small business.

Australia’s long relationship with Indonesia has resulted in extensive people-to-people connections. Australia is seen as cosmopolitan and welcoming and has the key advantages of geographic proximity and English language education provision. Australian education has a reputation for quality and the opportunity to work while studying is a key advantage in a highly price sensitive market.
Indonesian outbound student mobility levels are low, relative to the rest of the world. Although starting from a relatively low base, international student numbers from Indonesia are growing, increasing by 35 per cent in the last ten years.4

Australia is the most popular international destination for globally mobile tertiary students from Indonesia, followed by the United States (US). Despite Indonesia’s economic growth and emerging middle-class, onshore student enrolments have grown by just 8.5 per cent since 2015, and is only now returning to the peak levels recorded in 2002 (21,000).

**Government to government engagement**

› Australia and Indonesia signed the Indonesia-Australia Comprehensive Economic Partnership Agreement (IA-CEPA) on 4 March 2019. This agreement launches a new chapter in economic relations between Australia and Indonesia.

› The Australia-Indonesia bilateral education and training relationship is underpinned by a Memorandum of Understanding (MoU) established in 2014.

**SISTER CITIES AND STATES**

› Ambon, Maluku and Darwin, NT
› Bandung, West Java and Bega Valley, NSW
› DKI Jakarta and New South Wales
› East Java and Western Australia
› Kupang Province and Palmerston, QLD
› Padang Province and Fremantle, WA
› Semarang, Central Java and Brisbane, QLD
› Surabaya, East Java and Fremantle, WA
› Ujung Pandang, Sulawesi and Lismore, NSW
› West Java and South Australia

› The MoU covers cooperation at all levels of education. Australia–Indonesia Joint Working Group meetings on education, training and research set the direction for government-to-government cooperation under the MoU.

**Indonesian Government agencies**

<table>
<thead>
<tr>
<th>Government agency</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ministry of Research, Technology and Higher Education</td>
<td>Responsible for Research, Technology and Higher Education, including VET.</td>
</tr>
<tr>
<td>(referred to as Ristek Dikti)</td>
<td></td>
</tr>
<tr>
<td>Ministry of Education and Culture</td>
<td>Responsible for basic education from primary school through to high school,</td>
</tr>
<tr>
<td></td>
<td>including vocational high school.</td>
</tr>
<tr>
<td>Ministry of Manpower</td>
<td>Responsible for skilled workforce and vocational training.</td>
</tr>
</tbody>
</table>
Indonesia is a challenging market, however indicators point to growth opportunities.

Indonesia is the largest economy in South-East Asia, and the 16th largest economy in the world. Indonesia is at an earlier stage of development than other countries in the region. Its complex regulatory and legal systems, and many jurisdictional layers, create challenges to doing business. Strong relationships are critical to success. The complexity of this market highlights the value of a coordinated ‘team Australia’ approach.

Several key data points in Austrade’s ‘Where to Compete?’ online business advisory tool highlight Indonesia’s economic growth.

**Internet usage**

As the world becomes more connected, internet usage is an important measure of economic progress. The percentage of individuals using the Internet in Indonesia has doubled since 2013, supporting rapid uptake of technology and digital transformation.

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**Percentage of Indonesians using the Internet over time**

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>15%</td>
</tr>
<tr>
<td>2014</td>
<td>17%</td>
</tr>
<tr>
<td>2015</td>
<td>22%</td>
</tr>
<tr>
<td>2016</td>
<td>25%</td>
</tr>
<tr>
<td>2017</td>
<td>32%</td>
</tr>
</tbody>
</table>

The percentage of individuals using the Internet in Indonesia has doubled since 2013, supporting rapid uptake of technology and digital transformation.
Ease of doing business in Indonesia has improved with Indonesia ranked 72 out of 190 in 2018, up from 91 in 2017.

Number of short term visitors to Australia from Indonesia

Short term visitors from Indonesia to Australia are steadily increasing. There were 208,800 short term Indonesian arrivals in 2018, an increase of 42 per cent over the last 5 years.

There is a strong connection between tourism and international education. During studies, international students may be visited by friends and family, particularly around key milestones such as graduation. Further, international students’ decisions about where to study are strongly influenced by previous opportunities to visit as a tourist. International students may return to Australia following completion of their studies and/or recommend Australia as a tourism destination to others. According to Tourism Research Australia’s International Visitor Survey, in 2017, 52 per cent of visitors from Indonesia travelled to Australia for a holiday, while 21 per cent were visiting friends or relatives. In 2017, 8 per cent of all visitors from Indonesia visited an international student in Australia during their trip. 76 per cent of Indonesian international students had previously visited Australia before travelling here as a student.
Indonesia presents opportunities for both recruitment and transnational education and is an important diversification market for Australia.

- Indonesia’s average annual growth rate of over 5 per cent is one of the highest within the G20.
- Indonesia is the world’s fourth most populous country after China, India and the US and has the advantages of a relatively young demographic.
- Indonesia’s middle class is approaching 50 million – representing 20 per cent of the total population.
- According to PwC, Indonesia will be the world’s fourth largest economy by 2050.
- Indonesia is rapidly urbanising. The World Bank predicts that by 2025, 68 per cent of all Indonesians (177 million people) will live in cities.

Indonesia’s overarching Master Plan for the Acceleration and Expansion of Indonesia’s Economic Development (MP3EI) has the goal of ensuring sustainable development and growing per capita income. The MP3EI includes:

- a target to increase Indonesia’s skilled workforce to 113 million by 2030
- a commitment to a more efficient regulatory environment for key sectors, including education and training
- developing six regional ‘economic corridors’ in Indonesia (Sumatra, Kalimantan, Java, Sulawesi, Bali and Nusa Tenggara, and Papua-Maluku) through an integrated system of logistics transportation and ICT
- strengthening national connectivity through better infrastructure; and
- accelerating national science and technology.

Indonesia’s increasingly educated and IT-savvy youth, in combination with its middle class domestic consumption, will continue to drive overall productivity and economic growth.

5% GROWTH
Indonesia’s average annual growth rate is over 5%
One of the highest within the G20 since the Global Financial Crisis.

4TH LARGEST
Indonesia is the world’s fourth most populous country
After China, India and the United States.

50 MILLION
Indonesia’s middle class is approaching 50 million people
It is forecast by PwC to become the world’s 4th largest economy by 2050.

Market Action Plan – Indonesia
Indonesia is building the capacity of its universities, including in less developed areas, and revitalising vocational education colleges. Focus areas include improving accreditation and quality assurance processes and encouraging collaboration, including with international partners.

Indonesian values in relation to education tend to be holistic, encompassing social and moral factors. In addition to tangible outcomes, such as income, intangible drivers such as social status and moral development are important factors for Indonesian families when considering an international education.

According to research commissioned by Austrade, for Indonesians, the most influential factors in deciding where to study are shared personal experiences and recommendations from friends and family. Australian educated alumni, particularly when acquainted with prospective students, are important sources of information and advice. Opportunities to grow alumni engagement in Indonesia include leveraging alumni industry groups to promote careers for Australian graduates.

**IMPROVEMENT IN TRADE AGREEMENTS WILL OFFER MORE CERTAINTY TO AUSTRALIAN EXPORTERS**

The Indonesia-Australia Comprehensive Economic Partnership Agreement (IA-CEPA) provides a strong platform to expand the bilateral trade in services between Australia and Indonesia.

Education is Australia’s top services export to Indonesia, worth $861 million in 2017-18. Australian providers will benefit from more transparent and predictable operating conditions in Indonesia, including clarity on the qualifications they can offer and no restrictions on where they can operate. This benefits Indonesian students as it will increase their access to world-class skills training across Indonesia without the need for international travel.

For the first time in any FTA, Indonesia has offered commitments on a wide range of technical and vocational education, guaranteeing that Australian providers can establish majority Australian-owned joint ventures in Indonesia, and guaranteeing the conditions in which they can operate.

› IA-CEPA guarantees that Australian suppliers can own 67 per cent of investments in the vocational education and training sector (known in Indonesia as work training)

› IA-CEPA will provide certainty for Australian providers that they can establish a work training business anywhere in Indonesia and that the requirements for Australian trainers are accepted in Indonesia

› Australian training providers in this sector benefit from commitments that guarantee they can offer all Australian Qualifications Framework qualifications and Indonesian Qualifications Framework qualifications levels 1-5 in subject matters including technical engineering, business administration, languages, tourism, management, information technology, art and agriculture.
There are many opportunities for Australia to help Indonesia achieve its education, training and research goals. As a key regional partner, Indonesia has the potential to be a significant growth market for Australia.

**Schools**

- Indonesia recognises the need to significantly improve its education outcomes and employability pathways. This is driving a focus on school education and curriculum development to foster critical thinking and innovation.
- While significant effort in recent years has led to improved access to school education, the focus is now on improving quality and relevance.
- The teaching of international curricula has risen significantly in the last decade.
- Indonesia’s Ministry of Education and Culture is working to enhance the quality of teachers and school leaders and reform curricula.
- Academics and aspiring doctoral candidates are seeking higher level ‘academic English’.
- Demand for English training also exists in regional areas of Indonesia.

**VET and skills**

- Indonesia’s workforce skills are relatively underdeveloped and vocational education is a focus of Indonesian Government reform.
- Indonesia has identified the need for a high quality, industry-responsive VET system to enhance the competitiveness and competency of Indonesian graduates, domestically and in the context of the ASEAN Economic Community. Priorities sectors for the Indonesian Government include:
  - Tourism and hospitality
  - Agribusiness
  - Civil construction
  - Allied health
  - Transportation
  - Cyber security
  - Logistics.
- The Indonesian Government is focused on increasing the number of qualified teachers, improving practicum facilities and aligning curriculum with industry needs.
- Government skills and training reforms also encourage greater uptake of technology and the fostering of entrepreneurship and self-employment skills.
Indonesia’s highly diverse regions have their own skills development and industry training needs, presenting opportunities for Australian providers to develop customised solutions.

Polytechnics and community colleges have been established in every capital city. There is an increased focus on the development of vocational education within secondary schools and a national professional certification body has been created.

The Indonesian Government is actively encouraging private industry to collaborate with skills providers. Focus areas include industry internships, curriculum development and teacher training.

When looking for partnerships in the VET sector, in addition to the Ministry of Research, Technology and Higher Education, Australian providers should consider opportunities provided by other Indonesian Government agencies such as the Ministry of Manpower, the Ministry of Health, and the Ministry of Religious Affairs.

Higher Education

The Indonesian Government is focused on improving quality, for example by encouraging mergers of private higher education providers.

To achieve national science and technology objectives, higher education and research institutions are seeking opportunities to internationalise.

The Ministry of Research, Technology and Higher Education has published regulations allowing foreign higher education institutions to establish campuses in Indonesia. This development seeks to increase competition in the Indonesian higher education sector to enhance quality and foster innovation.

Competition for joint programs and collaborative projects is most intense with the top-ten Indonesian universities. However, opportunities also exist outside Java (for example, in Eastern Indonesia). Universities and polytechnics with capabilities in engineering, technology, environmental science, health and tropical studies are open to international partnerships.

Major competitors

According to UNESCO data (2016), Australia receives the highest number of globally mobile Indonesian tertiary students at 24.2 per cent.

The top three destinations for international tertiary students from Indonesia are Australia, the US (21 per cent) and Malaysia (18.2 per cent).

<table>
<thead>
<tr>
<th>Country</th>
<th>Per cent</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>24.2%</td>
<td>10,676</td>
</tr>
<tr>
<td>United States of America</td>
<td>21.0%</td>
<td>9,309</td>
</tr>
<tr>
<td>Malaysia</td>
<td>18.2%</td>
<td>8,039</td>
</tr>
<tr>
<td>United Kingdom of Great Britain and Northern Ireland</td>
<td>7.2%</td>
<td>3,164</td>
</tr>
<tr>
<td>Japan</td>
<td>6.5%</td>
<td>2,854</td>
</tr>
<tr>
<td>Egypt</td>
<td>4.9%</td>
<td>2,183</td>
</tr>
</tbody>
</table>

While the US remains a strong competitor, regional countries such as Malaysia, with which Indonesia has close ties and cultural allegiances, are emerging as strong alternatives to Australia. This is particularly the case in relation to higher education and research partnerships.

While enrolments in Australia have remained relatively flat in recent years, the number of Indonesians traveling to traditional and emerging competitor countries is steadily growing.

New competitors include Canada, Switzerland, the Netherlands, and Japan. These countries are engaging strategically by responding and adapting to the market, including through partnerships involving industry.
Australian education, training and research institutions are already actively pursuing opportunities in Indonesia, including collaborative partnership models. The Austrade website provides regular updates on MAPs actions and other initiatives in Indonesia.

**Indonesia case studies**

<table>
<thead>
<tr>
<th><strong>The Australian Technology Network of Universities (ATN) Technology and Innovation Showcase 2019</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>The Australian Technology Network of Universities (ATN) has held successful annual Inspiring International Research Excellence Showcases in Indonesia since 2016. The showcases bring Australian universities together with Indonesian universities, government agencies, researchers, and staff to highlight expertise in research and industry engagement and facilitate research partnerships and collaboration. In 2019, the ATN is expanding the showcase to include opportunities for collaboration between Australian universities, and Indonesian universities and industry partners. The Technology and Innovation Showcase will also enable participants to explore student exchange opportunities, both through Indonesian PhD scholarship schemes and the Australian Government’s New Colombo Plan for study abroad and internship opportunities.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>TAFE Queensland International: Revitalisation of Indonesia’s Skills Development through Industry Engagement</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>TAFE Queensland led a group of Queensland public and private VET and ELICOS providers to Indonesia in 2018 to deliver a training symposium to Indonesian Government officials, training organisations and industry partners. The delegation included Queensland industry partners who participated in live demonstrations of Australia’s VET-industry engagement practice and capability. Symposium case studies provided examples of training providers and industry working together, detailing delivery models that can be utilised to improve skills development in Indonesian industries. The symposium demonstrated the benefits of a collaborative approach to offshore VET engagement in industries of importance to Indonesia, including aviation and meat processing. In 2019, TAFE Queensland is using similar delivery models across other industry sectors in Indonesia, such as tourism and hospitality.</td>
</tr>
</tbody>
</table>
Western Australia East Java University Consortium (WAEJUC)

The Western Australia East Java University Consortium (WAEJUC) was developed following a Western Australian universities’ visit to Indonesia with the Western Australian Minister for Education in 2016. The benefit of a consortium effort in the region was identified and the five universities of Western Australia including; Curtin University; The University of Western Australia; Murdoch University; Edith Cowan University and The University of Notre Dame, united with the ten state universities of East Java to form the Western Australia East Java University Consortium. The Consortium leverages the combined strengths and resources of the universities, identifying opportunities in higher education, research, and community relations.

The Consortium was officially launched in Indonesia in 2017 under the 25 year old sister state agreement. The Consortium has worked on mobility programs, research links, and alumni events. A 2018-2020 Consortium plan will significantly advance the links between Indonesia and Australia through research, mobility, training in country and maintaining a focused effort in East Java. Current Consortium projects include a VET training needs analysis, and a WAEJUC scholarship scheme. Development of an outbound mobility program to East Java is being supported by funding through the Australian Government’s New Colombo Plan.

Victoria TAFE In-Country Consortia

The Victorian Government, through the TAFE Offshore Working Group, has been working with Victorian TAFE CEO’s on a consortium model to pursue high value strategic opportunities in Indonesia. Under the consortium model Victorian TAFE’s will be represented ‘in-country’ under the TAFE Victoria brand. A pilot is currently operating in Indonesia with dedicated resources allocated both in Melbourne and Indonesia.

An Indonesia “go-to-market” strategy was commission early in the pilot and has assisted in focusing resources and identifying potential opportunities by sector. Lead TAFE institutes for each of these sectors have been identified with consortium participants self-selecting based on capacity and capability in each of these industries.

A TAFE business development mission was held in August 2018, enabling key relationships with government and industry. Business development leads have resulted in a number of potential short, medium and long term consortium opportunities in teacher training, up-skilling new entrants and the existing workforce, and consultancy work at a systems level.
HOW CAN YOU PARTICIPATE IN THIS MARKET ACTION PLAN?

I WOULD LIKE INFORMATION ABOUT IN-MARKET ACTIVITIES

PLEASE CONTACT US FOR MORE INFORMATION:

Austrade Senior Trade Commissioner, Jakarta
Ms Sally-Ann Watts
Sally.Watts@austrade.gov.au

Department of Education and Training, Education Counsellor
Ms Elizabeth Campbell-Dorning
Elizabeth.Campbell-Dorning@dfat.gov.au

WEBSITE
For the latest list of Austrade activities:
www.austrade.gov.au/Australian/Education/Events

Austrade Australia based representative
Ms Natasha Monks, Manager International Education
Natasha.Monks@austrade.gov.au

I WANT TO SUGGEST AN ACTION OR JOIN A COLLABORATIVE PARTNERSHIP

There are several ways to suggest an action or join a collaborative partnership:

› Through your state and territory study clusters who can propose the idea/ action to the International Education Marketing Forum
› Through your peak representative body
› To the Department of Education and Training Counsellor if it is policy related and to Austrade’s Senior Trade Commissioner if for commercial opportunities
› Through Austrade’s International Education team.

I WANT TO KNOW HOW THE GOALS AND ACTIONS OF THIS MAP ARE PROGRESSING

Specific projects and initiatives undertaken by governments and the sector will be monitored and evaluated against the goals. Information about MAP actions and the status of projects is available at:
www.austrade.gov.au/MAPs
Austrade’s Market Information Package (MIP) provides market intelligence, opportunities, analysis and student data to support Australia’s international education sector. Austrade regularly updates market and competitor information on the MIP. This includes through the “Where to Compete?” online market insights tool, a data enabled advisory tool to clients – providing insights on market opportunities and trends to Australian providers.

Austrade’s Consortia Toolkit provides a step-by-step guide for Australian education and training providers to use a consortium model to pursue large scale borderless and offshore opportunities, in line with the AiE2025 game-changer of competing at scale.
## Enrolments from Indonesia by field and level of study

### Enrolments by field of education – all sectors

<table>
<thead>
<tr>
<th>Field of Education</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management and Commerce</td>
<td>9,756</td>
<td>10,317</td>
<td>10,195</td>
<td>10,608</td>
</tr>
<tr>
<td>Society and Culture</td>
<td>2,777</td>
<td>2,740</td>
<td>2,781</td>
<td>2,758</td>
</tr>
<tr>
<td>Food, Hospitality and Personal Services</td>
<td>1,462</td>
<td>1,452</td>
<td>1,255</td>
<td>1,313</td>
</tr>
<tr>
<td>Mixed Field Programmes</td>
<td>942</td>
<td>958</td>
<td>1,141</td>
<td>1,132</td>
</tr>
<tr>
<td>Information Technology</td>
<td>837</td>
<td>762</td>
<td>817</td>
<td>950</td>
</tr>
<tr>
<td>Engineering and Related Technologies</td>
<td>854</td>
<td>872</td>
<td>882</td>
<td>934</td>
</tr>
<tr>
<td>Creative Arts</td>
<td>745</td>
<td>706</td>
<td>778</td>
<td>899</td>
</tr>
<tr>
<td>Natural and Physical Sciences</td>
<td>637</td>
<td>707</td>
<td>759</td>
<td>826</td>
</tr>
<tr>
<td>Education</td>
<td>236</td>
<td>266</td>
<td>357</td>
<td>444</td>
</tr>
<tr>
<td>Health</td>
<td>406</td>
<td>398</td>
<td>402</td>
<td>399</td>
</tr>
<tr>
<td>Architecture and Building</td>
<td>294</td>
<td>299</td>
<td>333</td>
<td>354</td>
</tr>
<tr>
<td>Dual Qualification</td>
<td>170</td>
<td>138</td>
<td>139</td>
<td>160</td>
</tr>
<tr>
<td>Agriculture, Environmental and Related Studies</td>
<td>143</td>
<td>132</td>
<td>119</td>
<td>118</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td><strong>19,259</strong></td>
<td><strong>19,747</strong></td>
<td><strong>19,958</strong></td>
<td><strong>20,895</strong></td>
</tr>
</tbody>
</table>

### Higher education enrolments by level of study

<table>
<thead>
<tr>
<th>Level of Study</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advanced Diploma</td>
<td>21</td>
<td>6</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Associate Degree</td>
<td>52</td>
<td>63</td>
<td>76</td>
<td>92</td>
</tr>
<tr>
<td>Bachelor Degree</td>
<td>4,549</td>
<td>4,511</td>
<td>4,690</td>
<td>5,020</td>
</tr>
<tr>
<td>Bachelor Honours Degree</td>
<td>424</td>
<td>495</td>
<td>556</td>
<td>608</td>
</tr>
<tr>
<td>Diploma</td>
<td>807</td>
<td>774</td>
<td>918</td>
<td>1,109</td>
</tr>
<tr>
<td><strong>Subtotal – Undergraduate</strong></td>
<td><strong>5,853</strong></td>
<td><strong>5,849</strong></td>
<td><strong>6,241</strong></td>
<td><strong>6,829</strong></td>
</tr>
<tr>
<td>Doctoral Degree</td>
<td>737</td>
<td>707</td>
<td>684</td>
<td>672</td>
</tr>
<tr>
<td>Graduate Certificate</td>
<td>20</td>
<td>32</td>
<td>18</td>
<td>14</td>
</tr>
<tr>
<td>Graduate Diploma</td>
<td>48</td>
<td>34</td>
<td>52</td>
<td>70</td>
</tr>
<tr>
<td>Masters Degree (Coursework)</td>
<td>1,783</td>
<td>2,078</td>
<td>2,237</td>
<td>2,270</td>
</tr>
<tr>
<td>Masters Degree (Extended)</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Masters Degree (Research)</td>
<td>27</td>
<td>30</td>
<td>35</td>
<td>24</td>
</tr>
<tr>
<td><strong>Subtotal – Postgraduate</strong></td>
<td><strong>2,616</strong></td>
<td><strong>2,883</strong></td>
<td><strong>3,029</strong></td>
<td><strong>3,054</strong></td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td><strong>8,469</strong></td>
<td><strong>8,732</strong></td>
<td><strong>9,270</strong></td>
<td><strong>9,883</strong></td>
</tr>
</tbody>
</table>
Visa grants

In the July to December 2018 period, 3,353 primary full fee paying students from Indonesia were granted a student visa (13 per cent growth on the same period in 2017, up from 5 per cent growth in 2017 on 2016).

Higher Education student visa grants account for 55 per cent of the total, followed by VET with 38 per cent share.

NSW providers account for 45 per cent of new student visa grantees, followed by VIC with 33 per cent and QLD with 7 per cent.

Transnational Education

Indonesia was Australia’s 11th largest offshore higher education market, with 1,595 enrolments in 2017.

Australian university students’ mobility to Indonesia

The Australian Universities International Directors’ Forum (AUDEF) collects annual data on the number of Australian university students travelling overseas as part of their degree. According to AUDEF’s (2016) Learning Abroad 2015 National Report, in 2015 1,675 Australian university students travelled to Indonesia during their studies.

New Colombo Plan outbound Australian student numbers

The New Colombo Plan (NCP) is a signature initiative of the Australian Government which aims to lift knowledge of the Indo Pacific in Australia by supporting Australian undergraduates to study and undertake internships in the region.

Undergraduate students can apply for a scholarship program of up to 19 months, including study, internships or mentorships, and language training. A flexible mobility grants program offers short and longer-term study, internships, mentorships, practicums and language studies.

NCP Scholarship Recipients and Mobility students

<table>
<thead>
<tr>
<th>Sector</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scholarship recipients</td>
<td>10</td>
<td>8</td>
<td>14</td>
<td>14</td>
<td>51</td>
</tr>
<tr>
<td>Mobility students</td>
<td>602</td>
<td>823</td>
<td>1,113</td>
<td>2,131</td>
<td>4,669</td>
</tr>
</tbody>
</table>
The Australian Trade and Investment Commission (Austrade) is the Australian Government’s international trade promotion and investment attraction agency.

We deliver quality trade and investment services to businesses to grow Australia’s prosperity. We do this by generating and providing market information and insights, promoting Australian capability, and facilitating connections through our extensive global network.

We deliver international marketing and promotion services to the Australian education sector. This includes highlighting the global relevance, practicality and quality of Australian institutions, along with their innovation, creativity and focus on the future.

Austrade also supports Australian education providers through a range of information, advice and tailored services to support their international education engagement strategies. This includes the delivery of accurate and timely market intelligence and opportunities through the Market Information Package, an online portal available on a subscription basis to eligible institutions.

To discover how we can help you visit austrade.gov.au or contact us at info@austrade.gov.au or on 13 28 78 (within Australia).

REFERENCES
1. Department of Education and Training
2. Euromonitor International (2016)
4. Indonesian Government Agencies
5. Asialink business
10. ABS cat. No 3401.1 – Overseas Arrivals and Departures, August 2018, Table 5