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**MARKET ACTION PLANS**

**Purpose**

The Vietnam Market Action Plan (MAP) is designed to leverage Australia’s quality education and training to help Vietnam 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 Vietnam’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.

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.
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 Vietnam 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 insights to strengthen Australia’s capability and position in Vietnam.

The Australia in Vietnam Education and Training Advisory Group will continue working with government, industry, training providers and alumni to share information and facilitate opportunities for in-market collaboration.

Through biannual workshops with international education agents, Australian Government officers in Vietnam will continue to develop and disseminate insights on the activities of Australia’s key competitors. Austrade will continue to review in-market training demand and skills-gaps by sector and region and provide regular updates on Vietnam’s education policies and systems.

Action 1.1

Building on the November 2018 Australian Vietnam Schools Partnership Showcase, we will provide information and advice to support market access and entry for Australian school programs in Vietnam, including as an option for dual-school certification.
**Action 1.2**

We will continue to provide tailored support for new market entrants to Vietnam, 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 continue to engage with education agents in Vietnam, providing support through briefings and other events. We will also promote inbound education agent familiarisation tours with education agents from Vietnam to take part in familiarisation tours.

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 a world class international education destination for students from Vietnam and support increased enrolments in regional Australia.

**Action 2.1**

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

**Action 2.2**

We will deliver _#GoBeyond_ campaign 2.0 targeting Vietnamese students and regional locations in Australia.

---

**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 raise the profile in Vietnam of Australia's excellence in education systems, policy development, curriculum design, quality assurance and assessment. We will increase Australia's role in teacher training for English language proficiency, and delivery of executive and tailored English training. We will continue to promote Australian VET capabilities in Vietnam with a number of key VET provider champions selected by the Vietnamese Government.

**Action 3.1**

We will promote Australian VET capabilities in tourism and hospitality through events such as the _Australia-Vietnam Tourism and Hospitality Skills Showcase._

**Action 3.2**

We will deliver an in-market masterclass in the first half of 2019 showcasing Australia's cross-sectoral educational expertise in developing employability skills for Industry 4.0. The masterclass will showcase the use of innovative pedagogy and curriculum and resultant skills and careers outcomes to policy makers, industry, institutions, schools and education agents.

---

**Goal 4: Promote Australian innovative capability**

_Austrade will strengthen academic-industry linkages in emerging and enabling sectors in Vietnam._

We will promote the innovation ecosystem capabilities of Australia: including how institutions are supporting spinoff companies and strengthening linkages with industries.

**Action 4.1**

We will strengthen cross-sectoral institution industry linkages and promote research and development opportunities in emerging and enabling sectors in Vietnam (e.g. smart cities and agritech).
Goal 5: Build and leverage Australia and Vietnam’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 implement initiatives arising from the two education-focused MoUs. We will collaborate with the Government of Vietnam in key areas of policy, governance and quality assurance.

Action 5.1

We will continue a dialogue with the Government of Vietnam regarding education agent quality enhancement and referrals to Australia, including Vietnamese Government policy on education agents.

Action 5.2

We will promote and improve market access for Australia’s online education offerings. Vietnam has agreed to an online education pilot with Australia under the Comprehensive and Progressive Agreement for Trans-Pacific Partnership.

Goal 6: Continue to implement the Australian Alumni in Vietnam Strategy 2016-2021

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 coordinate and share information, including with existing alumni associations and Australian institutions. 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 mobilise alumni leaders in-market, to share their experiences of living and learning in Australia at key events and/or media, to raise Australia’s profile as a quality international education provider.
The Government of Vietnam is focused on maintaining economic growth to ensure that Vietnam successfully transitions from middle-income status to a high-income economy. With greater purchasing power, parents and students are seeking higher quality, in terms of facilities, educators, curriculum and access to global skills, knowledge and networks. Currently, Vietnam’s education system is unable to fully meet this demand.

### Vietnam enrolments by sector: percentage change 2015 – 2018

<table>
<thead>
<tr>
<th>Sector</th>
<th>2015</th>
<th>2018</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Higher Education</td>
<td>12,699</td>
<td>15,755</td>
<td>24.1%</td>
</tr>
<tr>
<td>VET</td>
<td>6,821</td>
<td>5,918</td>
<td>-10.6%</td>
</tr>
<tr>
<td>Schools</td>
<td>1,821</td>
<td>3,530</td>
<td>93.8%</td>
</tr>
<tr>
<td>ELICOS</td>
<td>7,524</td>
<td>3,769</td>
<td>-49.9%</td>
</tr>
<tr>
<td>Non-award</td>
<td>675</td>
<td>1,017</td>
<td>50.7%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>29,340</strong></td>
<td><strong>29,989</strong></td>
<td><strong>2.2%</strong></td>
</tr>
</tbody>
</table>

In 2018 there were 29,989 onshore enrolments from Vietnamese students across all sectors.
Although the higher education sector is driving growth in enrolments from Vietnam, total enrolments have grown by just 2.2 per cent since 2015. Higher education is the most popular education sector for Vietnamese enrolments in Australia. Schools has shown strong growth from 2017 to 2018 while ELICOS has experienced its fifth year of decline.

**Vietnamese enrolments across Australia**

- Darwin: 0.4%
- Regional WA: 0.1%
- Perth: 5.7%
- Adelaide: 5.9%
- Regional VIC: 0.7%
- Melbourne: 41.7%
- Regional Qld: 1.7%
- Brisbane: 7.0%
- Regional NSW: 2.2%
- Sydney: 32.1%
- ACT: 1.3%
- Tasmania: 1.2%
- Perth: 5.7%

**Victoria has the largest share of Vietnamese enrolments overall,** with 43 per cent of total enrolments in 2018. This is followed by New South Wales with 34 per cent and Queensland with 9 per cent.
The Government of Vietnam is undertaking comprehensive education reforms, aimed at improving the quality of Vietnam’s education system and providing opportunities for international partnerships and collaboration.

Both public and private Vietnamese institutions are actively seeking international partnerships to diversify and enhance their education programs.

Global career success is a key factor driving student choice in Vietnam. Students expect more experiential learning opportunities such as internships, volunteering and other professional development as part of their academic studies.

Opportunities exist across all education sectors.

› Vietnam is the second largest source country for international school students in Australia. Schools is Australia’s strongest performing sector for students from Vietnam, with over 20 per cent growth in both 2017 and 2018.

› Private English classes are popular in Vietnam, however, English proficiency remains relatively low, particularly outside major cities.

› As the economy grows, new industries are emerging, offering partnership opportunities for Australian providers to develop industry skills.

› Vietnam’s higher education sector is shifting focus, from increased supply to better quality and greater autonomy for institutions.

› Research collaboration has been identified by the Vietnamese Government as a way of boosting the country’s innovation capacity.

There are opportunities to diversify field of study and level of qualification for onshore students from Vietnam.

› Management and Commerce courses account for around 40 per cent of all enrolments from Vietnam. Society and Culture related courses have declined in recent years while Engineering and IT enrolments have grown. In line with the Vietnam Government’s national priorities, there are opportunities to further diversify study choices into Science, Technology, Engineering and Maths (STEM) subjects.

› Undergraduate Bachelor degree is the most popular level of higher education study for Vietnamese students in Australia, comprising of 40 per cent of total enrolments. A Masters Degree (coursework) is the next most popular level of study at 26 per cent. Vietnam’s interest in building innovative research capacity presents opportunities to diversify qualification levels into post graduate research studies.

Vietnam is emerging as a high potential borderless and edtech market. E-banking, e-commerce and e-payments are increasingly driven by high smartphone and internet penetration.

Vietnam is a diverse country with different skills and development needs in each region. There are opportunities in areas other than Hanoi and Ho Chi Minh City. For instance, Danang and Hoi An are growing hospitality and tourism industry centres.

Australia’s long relationship with Vietnam 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.

Vietnam continues to be a key education market for Australia. However, growth from Vietnam has remained flat over the last five years (mainly due to a decline in ELICOS enrolments) resulting in reduced global market share.
**Government to government engagement**

- In 2017, Australia and Vietnam announced that the bilateral relationship would be elevated to a Strategic Partnership. This reflects Australia and Vietnam’s mature and diverse relationship, encompassing cooperation on a wide range of issues, including education.

- In recent years, a strong program of two-way visits and dialogues has strengthened relations at senior levels. Australia and Vietnam have a specific Memorandum of Understanding (MoU) on vocational education and training as well as a broader MoU on education.

**SISTER CITIES AND STATES**

- Bunbury, WA and Nha Trang
- Maribyrnong, VIC and Ho Chi Minh
- Parramatta, NSW and Vungtau

**Vietnamese Government agencies**

<table>
<thead>
<tr>
<th>Government agency</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ministry of Education and Training (MOET)</td>
<td>Implements state education nationwide including pre-school education, general education and tertiary education.</td>
</tr>
<tr>
<td>Ministry of Labour, Invalids and Social Affairs (MOLISA)</td>
<td>Responsible for state administration of labour, employment, occupational safety, social insurances and vocational training.</td>
</tr>
<tr>
<td>Directorate of Vocational Education and Training (DVET)</td>
<td>DVET is a subordinate agency of MOLISA, which provides consultancy and assistance for the Minister of MOLISA. DVET-MOLISA’s main responsibilities include the development of VET policy, standards and qualification levels.</td>
</tr>
<tr>
<td>Ministry of Science and Technology (MOST)</td>
<td>Responsible for state administration of science and technology development strategy and policy, including scientific research, technology development and innovative activities; development of science and technology potential and international cooperation.</td>
</tr>
</tbody>
</table>

There are more than 60,000 Australian educated alumni in Vietnam. They are very influential in attracting students and showcasing the quality of Australia’s education sector. As well, diaspora communities are a significant attraction for prospective Vietnamese students and their families.

The Australia Alumni in Vietnam Strategy is a Department of Foreign Affairs and Trade initiative which sets out a local implementation plan for the Australia Global Alumni Strategy. Through activities such as professional networking events, alumni are encouraged to maintain their connection with Australia and advocate for mutually beneficial outcomes.
The environment in Vietnam is shifting with strong economic growth and policy reform.

Australia’s trading relationship with Vietnam has been our fastest-growing among the larger ASEAN economies in recent years. Bilateral trade has increased at an average annual rate of 12 per cent over the past five years. Total two-way trade between Australia and Vietnam in 2017 was valued at $12.8 billion. Of this, $1.2 billion was attributed to education and related travel services.\textsuperscript{2}

Several key data points in Austrade’s “Where to Compete?” online business advisory tool highlight Vietnam’s strong economic growth.

### Internet usage

As the world becomes more connected, internet usage is an important measure of economic progress. Vietnam is rapidly embracing technology and in 2017, 66 per cent of the population was connected to the Internet.

#### Percentage of Vietnamese using the internet over time\textsuperscript{3}

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>2013</td>
<td>39%</td>
</tr>
<tr>
<td>2014</td>
<td>41%</td>
</tr>
<tr>
<td>2015</td>
<td>44%</td>
</tr>
<tr>
<td>2016</td>
<td>47%</td>
</tr>
<tr>
<td>2017</td>
<td>66%</td>
</tr>
</tbody>
</table>

As the world becomes more connected, Internet usage is an important measure of economic progress.
Ease of doing business in Vietnam

Vietnam’s jump from **82 in 2017 to 68 (out of 190) in 2018** was driven by reforms in the area of paying taxes, judicial efficiency and making it easier to trade across borders.

Ease of doing business

Ease of doing business in Vietnam has improved, climbing 30 places over the past five years (World Bank, Ease of Doing Business Index). This is an important measure of growth as it benchmarks countries against international economic regulatory best practices. Improving regulatory practices have positive implications for foreign activity and investment. They are associated with higher economic growth, lower levels of unemployment, and lower levels of poverty. Recent reforms by the Government of Vietnam resulting in Vietnam’s jump from 82 in 2017 to 68 (out of 190) in 2018 include enhanced electronic taxation systems, a stronger civil procedures regulatory environment which makes it easier to enforce contracts, and strengthened dispute resolution frameworks.

Number of short term visitors to Australia from Vietnam

Short term visitors from Vietnam to Australia have significantly increased. There were 110,900 short term Vietnamese arrivals in 2018, a 171 per cent increase over the last five years.

There is a strong connection between tourism and international education. During studies, many international students are 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, 40 per cent of visitors from Vietnam travelled to Australia to visit friends or relatives, while 33 per cent travelled to Australia for a holiday.
Vietnam is a key market for Australia and is currently experiencing strong economic growth.

Vietnam presents opportunities for recruitment, transnational and online delivery and is an important diversification market.

- In 2017, Vietnam’s economy grew by 6.8 per cent, its highest growth rate in a decade.\(^8\)
- Vietnam has a population of 95 million\(^9\) and a median age of 31 years.\(^10\)
- Vietnam’s annual rate of urbanisation is one of the highest in the region.\(^11\)
- Vietnam’s middle class is on track to reach 33 million by 2020 – the fastest rate of middle class growth in ASEAN.\(^12\)
- Based on its current growth trajectory, Vietnam will join the world’s top 20 economies by 2050.\(^13\)

Education and training is a priority reform area for Vietnam, providing opportunities for international investment and collaboration. Key focus areas include addressing skills shortages in emerging industries, foreign language learning, higher education quality, employability skills, and research collaboration.

In June 2018, the Vietnamese Government issued a Decree\(^14\) regulating foreign cooperation and investment in education, including education linkages with foreign partners. This presents opportunities for partnerships and collaboration in the early childhood and schools sectors and the teaching of international schools curricular alongside local programs. It also paves the way for transnational institutional linkages and research collaboration. Vietnamese institutions are seeking international partners to support reforms and internationalise education in key industries such as agribusiness, health services and engineering.

---

**EASING REGULATORY ENVIRONMENT DESPITE A COMPLEX MARKET**

Vietnam’s regulatory environment is complex, with responsibility dispersed across various levels of central and provincial government. Education policies are developed by two central agencies. The Ministry of Education and Training (MOET) is responsible for higher education, and the Ministry of Labour, Invalids and Social Affairs (MOLISA) is responsible for vocational education and skill training. Local authorities at provincial and district levels are respectively responsible for secondary and primary schools.

Policy implementation is shared between the Central Government and Vietnam’s 63 provinces.
SECTOR SPECIFIC OPPORTUNITIES

There are many opportunities for Australia to help Vietnam achieve its education, training and research goals. As a key regional partner, Vietnam has the potential to be a significant growth market for Australia.

Schools

 › The Renovation of General Education Project, funded by the World Bank with $USD77 million (2016-2021) is supporting the development of competency-based curriculum for schools.

 › There are opportunities for Australian providers to partner with Vietnamese schools to share expertise in school curriculum development, assessment and teaching resources and to provide teacher training.

 › Local education authorities are actively promoting international school partnerships.

 › There is an increasing trend for parents to send their children overseas for high school studies and strong demand for internationally-recognised school programs in Vietnam, especially those with English as the language of instruction. Currently, the supply of these options in-market is limited.

VET and skills

 › Australia is working with the Government of Vietnam to establish structures for government/industry/training provider collaboration.

 › As Vietnam’s economy grows, new industries are emerging. In many cases, the local labour force does not have the skills or qualifications to meet the needs of these industries.

 › According to the Vietnam National Administration of Tourism, by 2020, Vietnam’s tourism sector will need more than 2 million people directly providing tourism services. At present, there are only 1.3 million workers in tourism services nationwide.

 › Australian VET expertise aligns well with Vietnam’s industry skills needs.

 › Vietnam’s Central Government has set ambitious training targets and recognises the need for foreign training expertise. Opportunities exist in:
   › Tourism and hospitality
   › Train-the-trainer
   › Healthcare
   › Logistics
   › High-tech manufacturing.

 › Opportunities also exist for Australian providers to deliver training directly to industry, particularly in the services sectors. Opportunities include customised, executive and non-accredited training.

FTA driven tariff cuts are driving strong growth in the food and beverage sectors. Accompanying this growth is a higher demand for premium quality products and a preference for dining out, especially among younger people. This domestic demand provides opportunities for Australian education institutions to deliver hospitality training.
Emerging interest in vocational training is geographically dispersed, with significant education agent enquiries from provincial areas. There is an opportunity to ensure agents and other key influencers in regional locations receive information about the quality and availability of Australian VET courses.

**English language**

- Australian English language training is well regarded in Vietnam. In-market opportunities exist through demand for short-term English training courses, particularly for young students to attend summer study tours as well as for executive training.
- In response to demand for early English-language education, many schools are offering additional English lessons in partnership with private English language centres.
- As the quality of English training in Vietnam has increased, the number of students travelling to Australia for English language training has declined. However, opportunities remain for Australian providers to build teacher capacity, and deliver executive and academic-English training.

**Higher Education**

- Vietnam’s higher education sector is shifting focus, from increased supply to enhanced quality and greater autonomy for institutions. The Vietnamese Government is actively encouraging more STEM transnational partnerships and local universities are keen to improve their international rankings.
- There is increasing demand for in-country PhD programs where local institutions can upgrade the qualifications of their staff without having to send them overseas.

**Edtech**

- The edtech market in Vietnam is experiencing rapid growth. While many start-ups focus on language training, there are opportunities to capitalise on other subjects of interest to the market, such as Science, Technology, Engineering and Maths (STEM) education, particularly in higher education.
- The Vietnamese Government is implementing policies and regulatory frameworks to ensure the sustainable development of start-up sectors (including fintech and edtech).

**Major competitors**

According to UNESCO data (2016), Australia receives the third highest number of Vietnamese globally mobile tertiary students at 18.2 per cent. In 2016, Japan overtook Australia to become the second most popular destination for Vietnamese tertiary students, after the United States (US).

Vietnamese tertiary enrolments in the US and Japan are continuing a strong growth trend while enrolments in Australia remain relatively flat. In 2017, Vietnam was the United States’ sixth largest market for international students, growing by 4.8 per cent, year-on-year.

Canada is emerging as a major education destination for tertiary students from Vietnam due in part to its more favourable visa settings and post study work opportunities. Vietnamese student enrolments in Canada increased by 89 per cent in 2017 and 46 per cent in 2016, making it one of the fastest growing markets.
Vietnamese globally mobile tertiary students (UNESCO, 2016)

### Country | Per cent | Number |
--- | --- | --- |
United States of America | 27.8% | 22,171 |
Japan | 24.0% | 19,152 |
**Australia** | **18.2%** | **14,491** |
France | 5.5% | 4,400 |
United Kingdom of Great Britain and Northern Ireland | 5.0% | 3,979 |
Republic of Korea | 4.3% | 3,432 |

Canada is emerging as a strong competitor, largely due to its Canadian Express Scheme and recent Study Direct Stream which offer more streamlined visa application procedures for Vietnamese students, reducing visa processing time from months to less than four weeks.

373% increase  
Of Vietnamese enrolments in Japan between 2012 and 2016.  
During this period Australia increased by 31%

The largest share  
Of Vietnamese tertiary outbound students go to the US.  
This is followed by Japan, which overtook Australia in 2016.

89% growth  
Vietnam is Canada’s fastest growing international education market.
EXAMPLES OF EXISTING INITIATIVES

Australian education, training and research institutions are already actively pursuing opportunities in Vietnam, including collaborative partnership models. The Austrade website provides regular updates on MAPs actions and other initiatives in Vietnam.

Vietnam case studies

Box Hill Institute’s partnership with Hoa Sen Vocational College in Vietnam

Demand for hospitality training in Vietnam is outstripping supply. For Box Hill Institute, the challenge was how to provide vocational qualifications compliant with Australian standards, while offering a customised and flexible delivery model to meet local industry needs and government objectives. The solution was a partnership model with Hoa Sen Vocational College to provide teacher training and deliver Australian vocational qualifications on-site. Courses are contextualised to meet local industry needs. The partnership provides hospitality and commercial cookery courses. Box Hill Institute supports Hoa Sen through professional development and quality assurance visits to continuously upskill Hoa Sen teachers while sharing best practice.

StudyAdelaide Vietnam Ambassador Campaign

StudyAdelaide’s will launch the ‘2019 Study Adelaide Ambassador’ campaign in Vietnam in the second half of the year. Targeting prospective students across all sectors, the top ten applicants who best articulate what motivates them to study in Adelaide will win a support package including flight vouchers, student accommodation, financial support, as well as tickets to festivals and events. Any South Australian education institution, regardless of sector, is eligible to participate in the campaign.
Australian Industry Standards and Aus4Skills – Industry-led VET framework

Australian Industry Standards (AIS) and Aus4Skills are collaboratively developing a Vietnam industry-led vocational education and training (VET) framework. The logistics sector, which is the 2019 pilot industry, is important to Vietnam’s economic development and Australia’s trade with Vietnam.

The aim of the pilot is to implement a model for skills development in the logistics industry that can be replicated by other industry sectors in Vietnam. AIS is assisting Vietnam to establish an industry-led mechanism to engage logistics industry employers and the VET sector in skills development. Occupational standards for selected job roles in logistics are also being developed. Through the project, Australian expertise is helping to build the capacity of Vietnamese colleges and enterprises.

The project will enable Vietnamese colleges to meet a predicted demand for 250,000 skilled logistics workers by 2030. This includes competency-based curriculum writing for academic leaders and senior trainers. The training will equip the participants with theory and skills for writing curricula aligned to industry agreed skills standards for logistics operator roles.

To establish an advisory mechanism for engaging logistics industry employers and the VET sector, the Australian Government launched the Logistics Industry Reference Council (LIRC) in partnership with the Government of Vietnam in Ho Chi Minh City in December 2017. The Council is modelled on the Australian Industry Reference Committees, adapted to Vietnam’s context. Following the success of a 2018 study tour to Australia, AIS and Aus4Skills will facilitate a 2019 study tour for key members of the LIRC, government agencies, employers’ representatives, and colleges to gain a deeper understanding of industry engagement methods, and options to support the LIRC.

Chisholm Capacity Building Partnership

Since 2013, Chisholm and the Government of Vietnam have been working on a major vocational training reform project in 12 industry areas of strategic importance and with 25 vocational colleges from around the country. Vocational packages have been developed including qualifications for the Vietnam context, equipment lists, assessment tools, and lists of teaching and learning materials. In 2014, 195 vocational trainers from Vietnam travelled to Australia for training followed by a further 130 in 2017.

To prepare the 25 vocational colleges to deliver the packages, a comprehensive audit, focused on teacher competence, equipment and WHS compliance, was undertaken for each college. The Government of Vietnam funded equipment purchases, WHS issues were addressed, and targeted industry experience opportunities were facilitated.

Delivery of the vocational packages commenced in 2018. Chisholm’s team of trade mentors support the colleges from Australia and in Vietnam through regular visits.

A key strategy for this project is to improve the English language proficiency of teachers and students. The Government of Vietnam funds English language teachers to enable students to reach the entry requirements of their trade qualifications.
HOW CAN YOU PARTICIPATE IN THIS MARKET ACTION PLAN?

PLEASE CONTACT US FOR MORE INFORMATION:

**Austrade Senior Trade Commissioner, Ho Chi Minh**
Ms Yvonne Chan
Yvonne.Chan@austrade.gov.au

**Department of Education and Training, Education Counsellor**
Ms Joanna Wood
Joanna.Wood@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

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.

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 Vietnam by field and level of study

<table>
<thead>
<tr>
<th>Enrolments by field of education – all sectors</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management and Commerce</td>
<td>11,235</td>
<td>11,676</td>
<td>12,188</td>
<td>11,832</td>
</tr>
<tr>
<td>Society and Culture</td>
<td>8,313</td>
<td>7,038</td>
<td>5,665</td>
<td>5,006</td>
</tr>
<tr>
<td>Mixed Field Programmes</td>
<td>2,927</td>
<td>3,222</td>
<td>4,086</td>
<td>4,622</td>
</tr>
<tr>
<td>Engineering and Related Technologies</td>
<td>1,107</td>
<td>1,193</td>
<td>1,459</td>
<td>1,492</td>
</tr>
<tr>
<td>Information Technology</td>
<td>1,020</td>
<td>1,121</td>
<td>1,344</td>
<td>1,490</td>
</tr>
<tr>
<td>Food, Hospitality and Personal Services</td>
<td>1,634</td>
<td>2,025</td>
<td>2,003</td>
<td>1,461</td>
</tr>
<tr>
<td>Health</td>
<td>1,000</td>
<td>1,088</td>
<td>1,140</td>
<td>1,224</td>
</tr>
<tr>
<td>Creative Arts</td>
<td>562</td>
<td>579</td>
<td>705</td>
<td>828</td>
</tr>
<tr>
<td>Natural and Physical Sciences</td>
<td>482</td>
<td>515</td>
<td>567</td>
<td>633</td>
</tr>
<tr>
<td>Education</td>
<td>337</td>
<td>409</td>
<td>497</td>
<td>577</td>
</tr>
<tr>
<td>Architecture and Building</td>
<td>285</td>
<td>297</td>
<td>306</td>
<td>362</td>
</tr>
<tr>
<td>Dual Qualification</td>
<td>333</td>
<td>294</td>
<td>278</td>
<td>326</td>
</tr>
<tr>
<td>Agriculture, Environmental and Related Studies</td>
<td>105</td>
<td>123</td>
<td>133</td>
<td>136</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td><strong>29,340</strong></td>
<td><strong>29,580</strong></td>
<td><strong>30,371</strong></td>
<td><strong>29,989</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Higher education enrolments by 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>16</td>
<td>8</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Associate Degree</td>
<td>92</td>
<td>79</td>
<td>90</td>
<td>88</td>
</tr>
<tr>
<td>Bachelor Degree</td>
<td>6,171</td>
<td>6,797</td>
<td>7,380</td>
<td>8,069</td>
</tr>
<tr>
<td>Bachelor Honours Degree</td>
<td>402</td>
<td>535</td>
<td>732</td>
<td>920</td>
</tr>
<tr>
<td>Diploma</td>
<td>1,849</td>
<td>1,796</td>
<td>1,770</td>
<td>1,606</td>
</tr>
<tr>
<td><strong>Subtotal – Undergraduate</strong></td>
<td><strong>8,530</strong></td>
<td><strong>9,215</strong></td>
<td><strong>9,975</strong></td>
<td><strong>10,683</strong></td>
</tr>
<tr>
<td>Doctoral Degree</td>
<td>799</td>
<td>815</td>
<td>904</td>
<td>956</td>
</tr>
<tr>
<td>Graduate Certificate</td>
<td>53</td>
<td>73</td>
<td>121</td>
<td>107</td>
</tr>
<tr>
<td>Graduate Diploma</td>
<td>94</td>
<td>114</td>
<td>96</td>
<td>88</td>
</tr>
<tr>
<td>Masters Degree (Coursework)</td>
<td>3,180</td>
<td>3,537</td>
<td>3,859</td>
<td>3,871</td>
</tr>
<tr>
<td>Masters Degree (Extended)</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Masters Degree (Research)</td>
<td>41</td>
<td>59</td>
<td>48</td>
<td>48</td>
</tr>
<tr>
<td><strong>Subtotal – Postgraduate</strong></td>
<td><strong>4,169</strong></td>
<td><strong>4,600</strong></td>
<td><strong>5,030</strong></td>
<td><strong>5,072</strong></td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td><strong>12,699</strong></td>
<td><strong>13,815</strong></td>
<td><strong>15,005</strong></td>
<td><strong>15,755</strong></td>
</tr>
</tbody>
</table>
Visa grants

In the period July to December 2018, 4,715 primary full fee paying students from Vietnam were granted a visa (4.8 per cent growth on the same period for 2017).

Higher Education student visa grants account for 65 per cent of the total, followed by Schools with 18 per cent share.

Victoria providers account for 39 per cent of new student visa grantees, followed by New South Wales with 35 per cent and Queensland with 10 per cent.

Transnational Education

Vietnam was Australia’s fourth largest offshore higher education market, with 6,816 enrolments in 2017.

Vietnam had 790 offshore VET enrolments in 2017, up from 348 in 2016.

Australian university students’ mobility to Vietnam

The Australian Universities International Directors’ Forum (AUADF) collects annual data on the number of Australian university students travelling overseas as part of their degree. According to AUADF’s (2016) Learning Abroad 2015 National Report, in 2015, 895 Australian university students travelled to Vietnam 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>0</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Mobility students</td>
<td>161</td>
<td>251</td>
<td>340</td>
<td>784</td>
<td>1,536</td>
</tr>
</tbody>
</table>
ABOUT AUSTRADE

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. Source: Department of Education and Training
7. Source: ABS cat. No 3401.1 – Overseas Arrivals and Departures, August 2018, Table 5
11. ibid
14. No.86/2018/ND-CP