

EDUCATION WITH BORDERS



**REALISING THE OPPORTUNITY TO GAIN A WORLD CLASS INTERNATIONAL
EDUCATION IN THE AGE OF COVID19**

Presented by Mr Dary Milani and Mr Stephen Healy

THE UNIVERSITY OF NEWCASTLE



THE UNIVERSITY OF
NEWCASTLE
AUSTRALIA



THE UNIVERSITY OF NEWCASTLE **BY NUMBERS**



**RANKED
207**

in the world¹



37,677

students from 114 nations educated
and supported by 2,680 full-time
equivalent staff²



143,000+

in our global alumni community
based in 134 countries around
the world³



**HIGHEST
RANKED**

regional university in Australia¹



**180
PARTNERSHIPS**

in 32 countries for student exchange
and study abroad programs



NO. 1

University in Australia for
Indigenous enrolments⁴

Building a sustainable international education sector

 | FOR AUSTRALIANS | FOR EDUCATION SECTOR 

Contributing to the building of a sustainable international education sector

Austrade is responsible for the international marketing and promotion of Australian education and training.

Through an extensive international network, Austrade is well-positioned to identify quality opportunities and timely market intelligence. Information gathered in-market is disseminated to the Australian education sector to assist providers make informed decisions and develop strategies to develop international relationships and business. A key priority is the development of transnational education opportunities in growth and emerging markets, especially in Asia.

Austrade has worked with the international education sector to develop a long-term market development roadmap to enable the sustainable growth of the sector into the future.



International education data

Austrade provides market intelligence, data and analysis, along with interactive data through MIP Orbis, to empower Australia's international education and training sector.

Find out more... >



Reports

[January 2020 International student data available](#)

[Austrade report: Vietnam edtech scoping study](#)

[Report on LATAM industry skills training opportunities released](#)

More reports >



For students

Find out about studying in Australia.

Visit website >



Market Information Package

The Market Information Package (MIP) market intelligence, opportunities, and student data to support Australia's international education sector.

About the Market Information Package

Analysis

Growth and opportunity in Australian international education

Widening the traditional lens

Deloitte Access Economics, in partnership with EduWorld, looks at the scale and scope of the international education opportunity available to Australia over the next decade.



International education is Australia's largest service export and the nation's fourth largest export overall – after iron ore, coal and natural gas. Looking ahead, international education is expected to be among the major beneficiaries of the unprecedented economic transformation the global economy is currently undergoing.

At the same time, technology is changing the way education is purchased, experienced and consumed, and is extending international education markets beyond their established geographic and service boundaries. These supply-side shifts are potentially just as seismic as the changes in demand.


The Australian Trade Commission (Austrade) engaged Deloitte Access Economics, in partnership with EduWorld, to develop an independent and evidence-informed research report that assesses the scale and scope of the international education opportunity available to Australia over the next decade.




Growth and opportunity in Australian International Education

Download the report

 Contact us

 Submit RFP

 Our Solutions

Explore content

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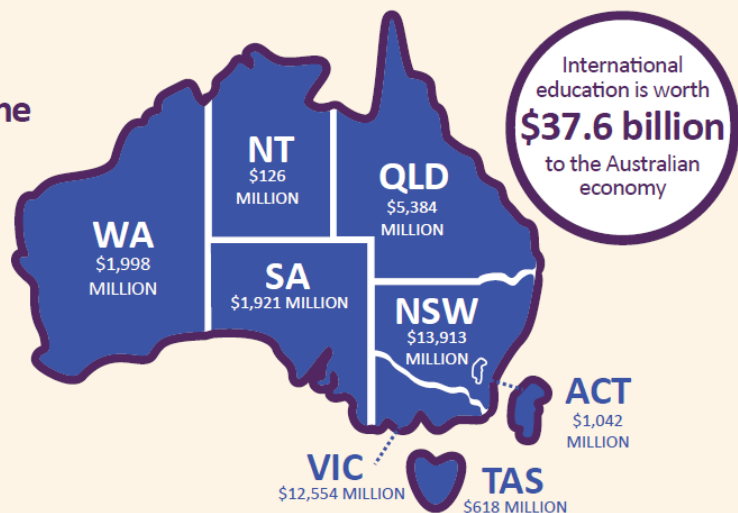
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www.austrade.gov.au/Australian/Education/Services/australian-international-education-2025/growth-and-opportunity

<https://www.austrade.gov.au/Australian/Education/education-data>

2018–19
export income
by state and
territory



Education is the **4th largest export** for Australia



International education supports nearly **250,000 jobs** nationally



China **30%** and India **13%** were the **largest sources** of international students in 2018



46% of international enrolments in 2018 are in **higher education** and **28%** in **vocational education and training**

LARGEST EXPORT INDUSTRY EXCLUDING MINING

<https://internationaleducation.gov.au/research/Research-Snapshots/Documents/Education%20infographic%20Australia%202018%E2%80%9319.pdf>

Education export income by country 2018–19



Education export income (\$) by country

Countries	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	% change from 2017–18 to 2018–19
China (excludes SARs and Taiwan)	4,928	5,548	7,010	9,003	11,093	12,095	9.0%
India	1,638	2,342	2,733	3,160	3,808	5,495	44.3%
Nepal	570	728	816	1,052	1,636	2,628	60.6%
Malaysia	837	889	1,067	1,274	1,387	1,378	-0.6%
Vietnam	1,067	1,198	1,195	1,218	1,301	1,368	5.1%
Brazil	491	583	605	696	870	1,015	16.7%
Korea, Republic of (South)	877	912	930	953	967	984	1.8%
Indonesia	651	698	748	804	865	935	8.1%
Pakistan	486	591	632	626	657	762	16.0%
Thailand	662	773	791	807	791	757	-4.3%
Rest of the world	6,321	6,996	7,618	8,500	9,227	10,139	9.9%
Total (\$m)	18,528	21,258	24,145	28,093	32,602	37,556	15.2%
Multilaterals							
APEC	11,722	12,975	15,071	17,836	20,445	21,804	6.6%
ASEAN	4,042	4,450	4,788	5,202	5,530	5,829	5.4%
EU	1,247	1,427	1,462	1,517	1,533	1,567	2.2%
OECD	3,307	3,592	3,750	4,048	4,213	4,361	3.5%

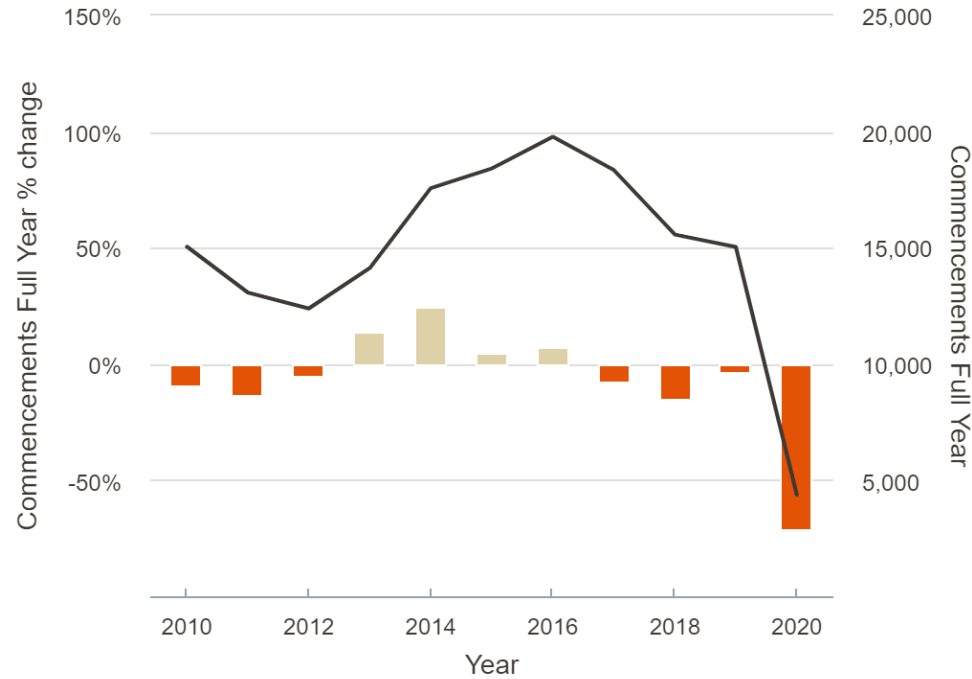
Source: Australian Bureau of Statistics Catalogue Number 5368.0.55.003

ASEAN
\$5.8B

THAILAND
\$757M

<https://internationaleducation.gov.au/research/Research-Snapshots/Documents/Export%20Income%202018%E2%80%9319%20Country%20Infographic.pdf>

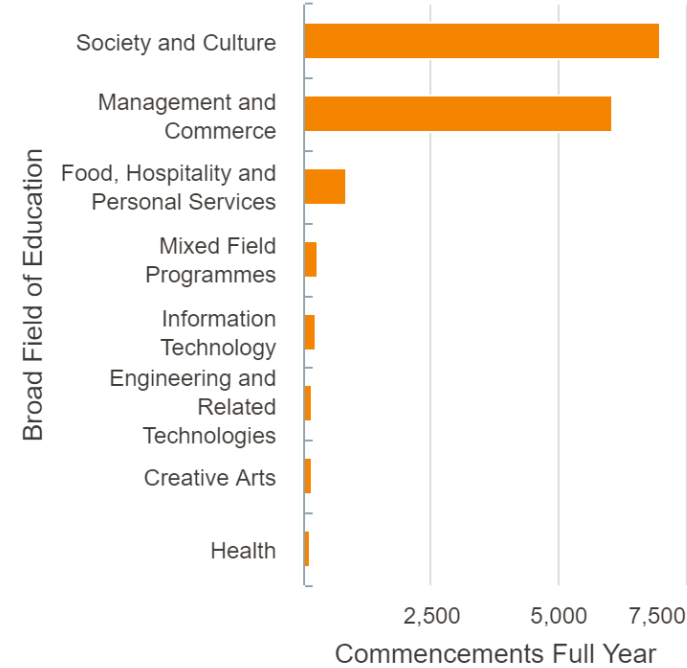
Total and % change



Source: Department of Education and Training
Filtered by: Nationality Thailand,
Sector All, and State All

EXPLORE

Top fields of education 2019



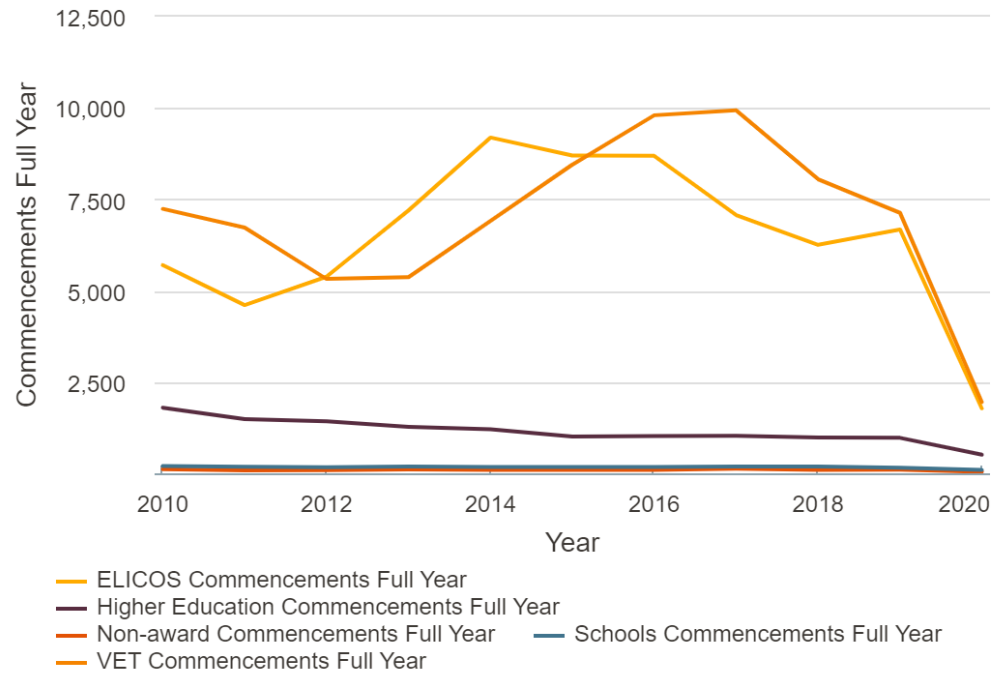
Source: Department of Education and Training
Filtered by: Year 2019, Nationality
Thailand, Sector All, and State All

EXPLORE

15,035 COMMENCING THAI STUDENTS IN AUSTRALIA IN 2019

ENGLISH LANGUAGE FOLLOWED BY BUSINESS

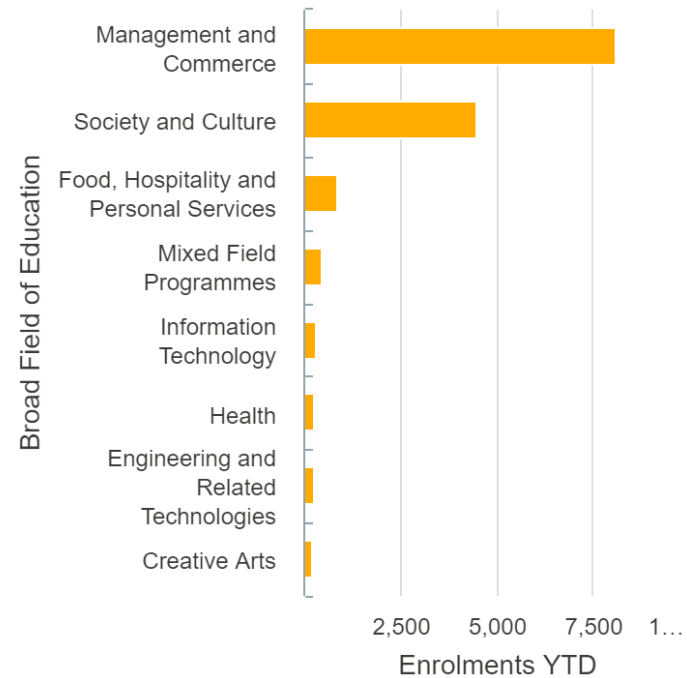
Trends by sector - all



Source: Department of Education and Training
Filtered by: Nationality Thailand and State All

EXPLORE

Top fields of education 2019

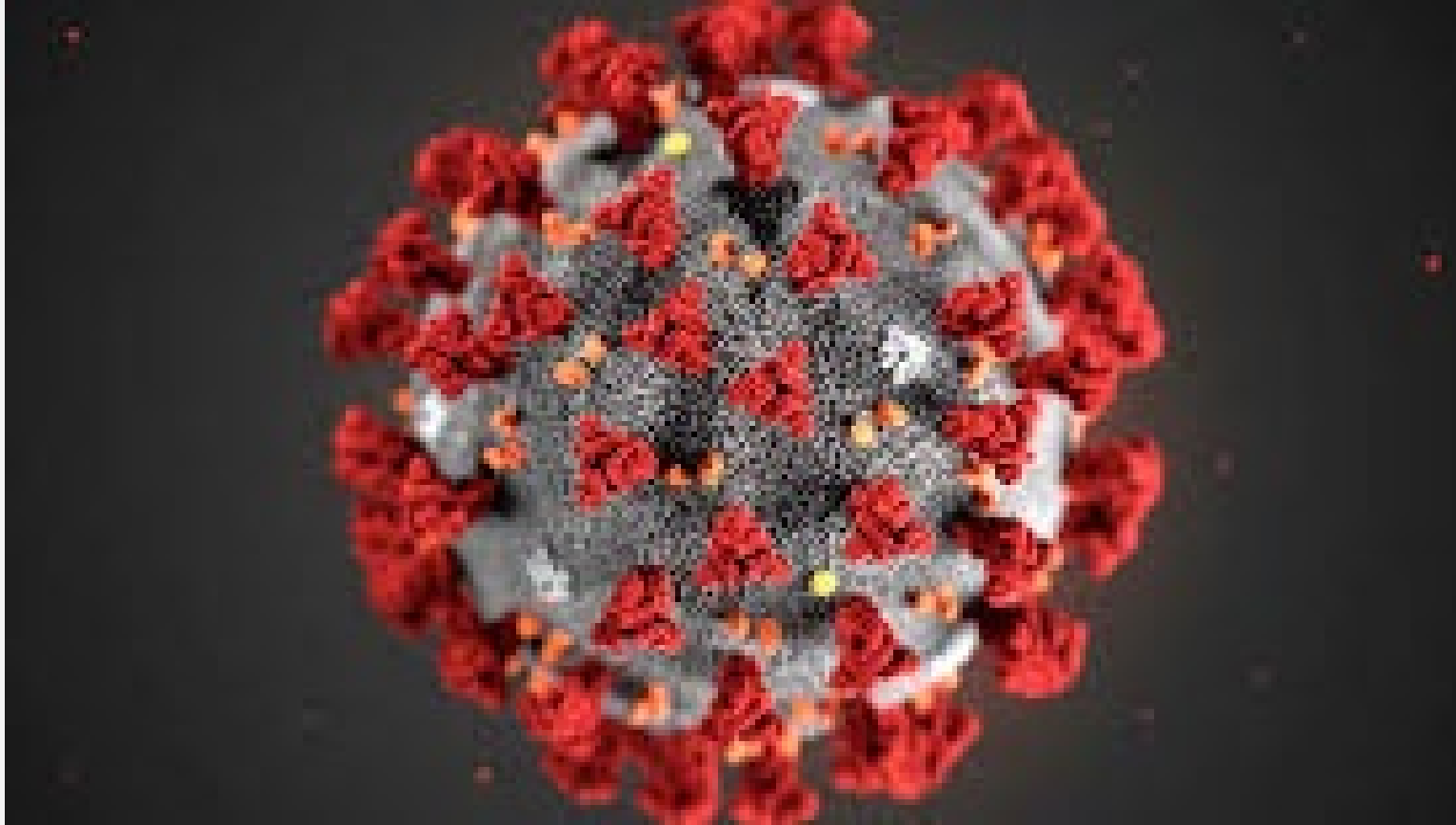


Source: Department of Education and Training
Filtered by: Year 2019, Nationality Thailand, Sector All, and State All

EXPLORE

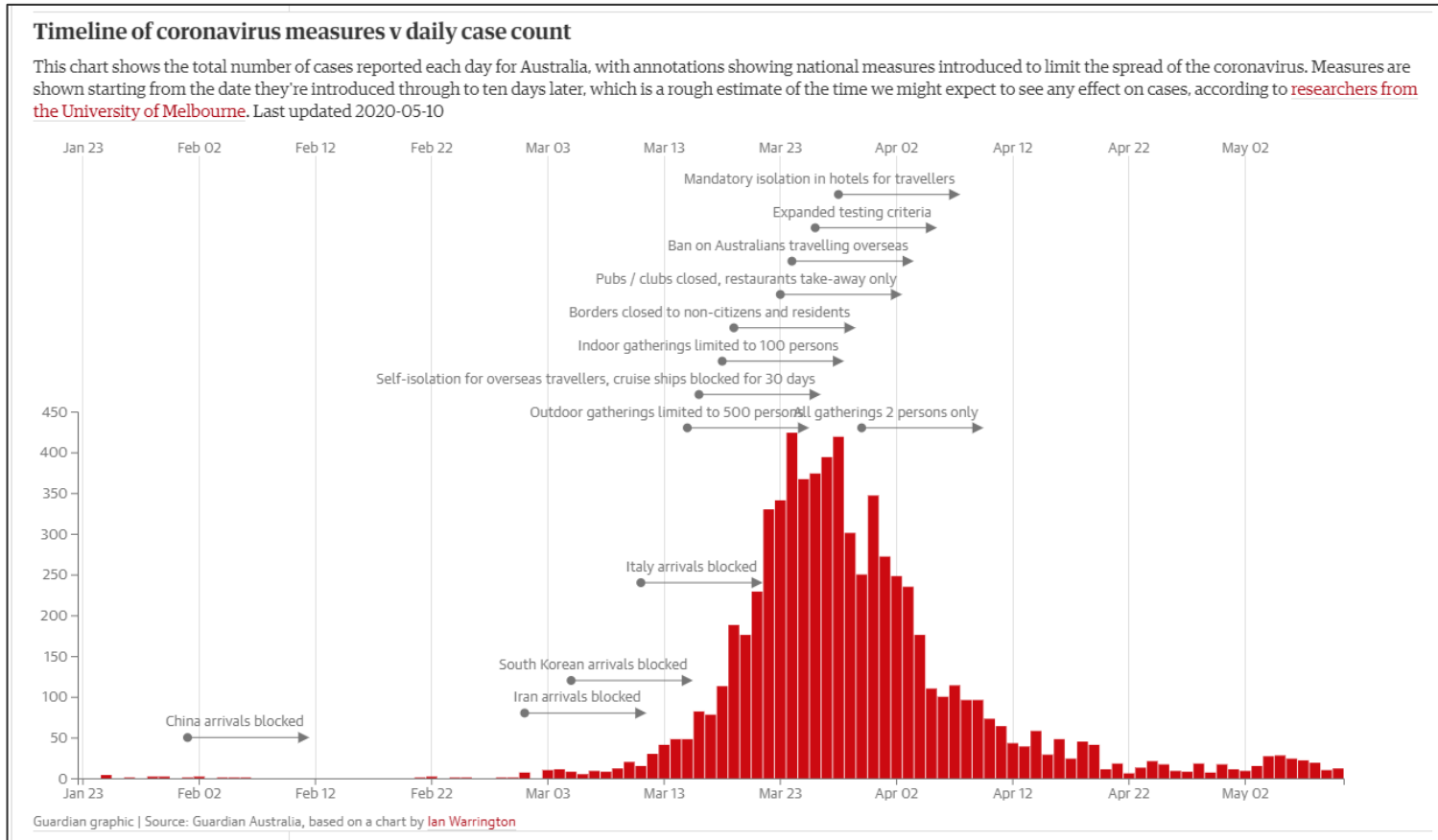
LESS THAN 1000 STUDENTS IN HIGHER EDUCATION

OVER 7000 ARE STUDYING BUSINESS IN VOCATIONAL SCHOOLS

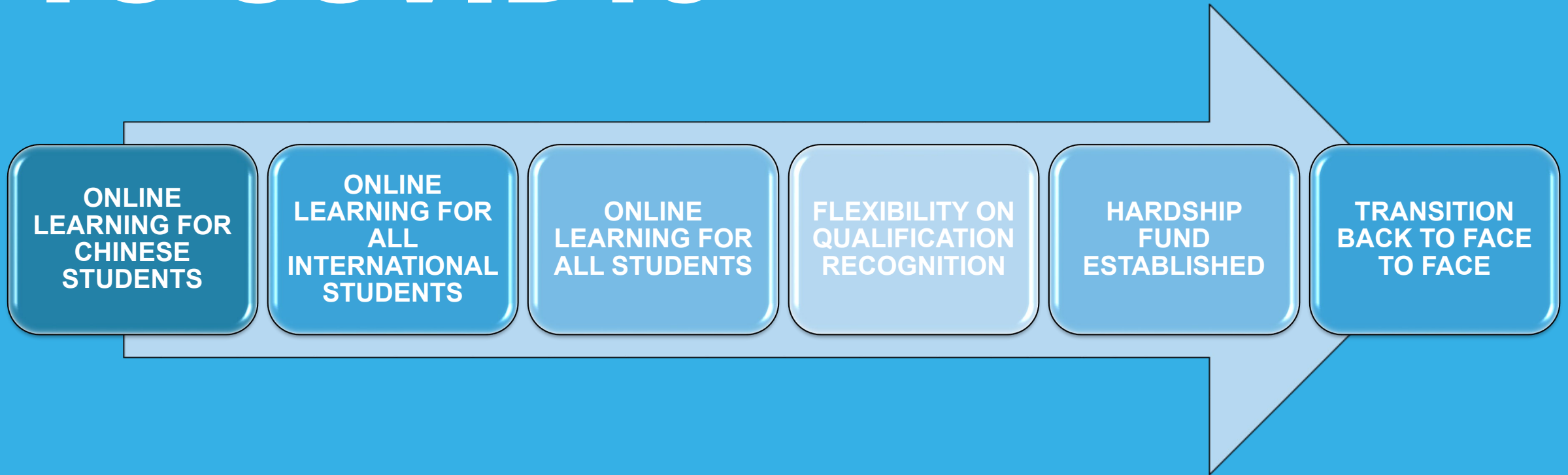


COVID-19

TIMELINE OF AUSTRALIAN MEASURES

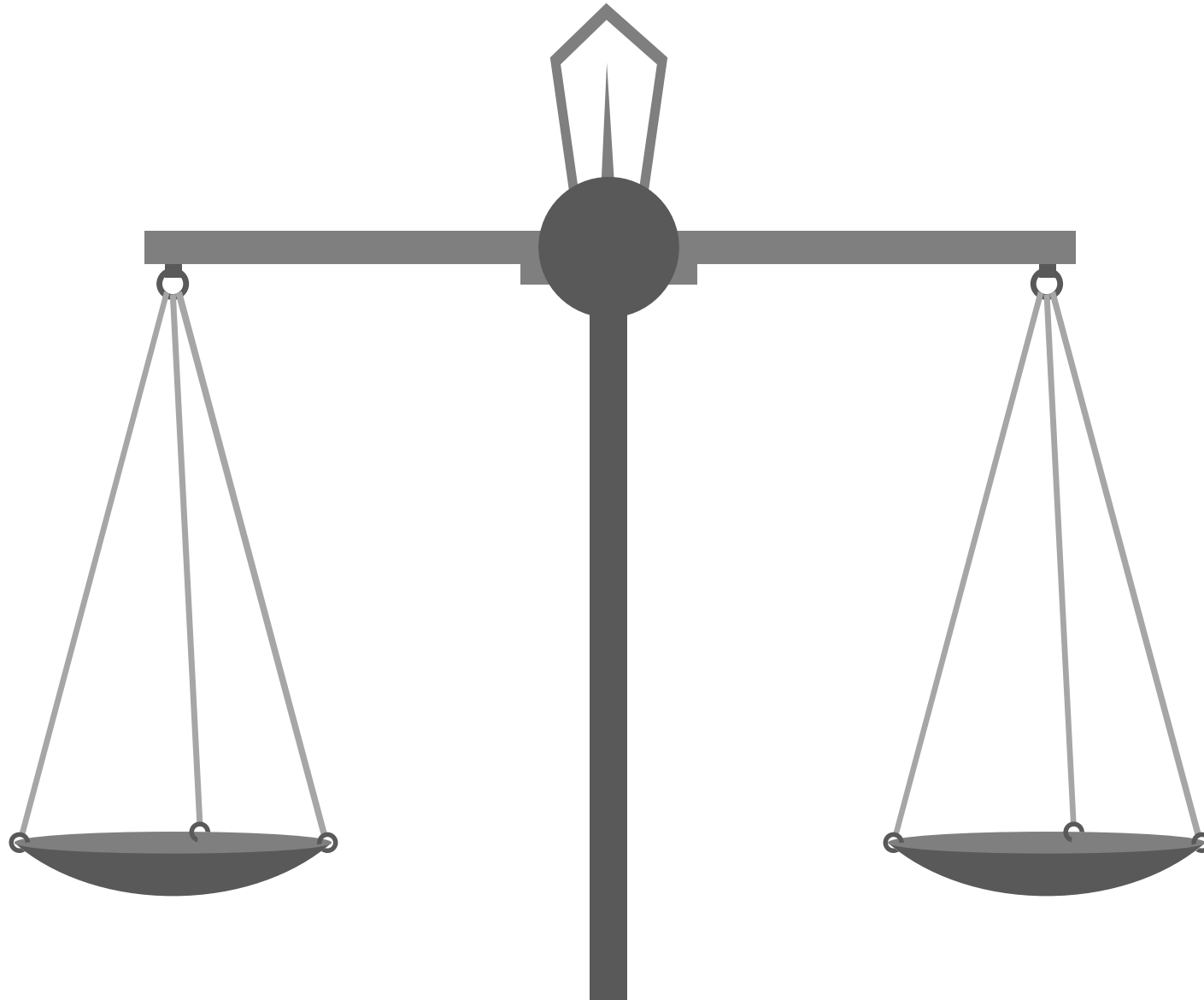


UON RESPONSE TO COVID19



WHERE ARE WE **NOW** AS A SECTOR?

- **BORDERS REMAIN CLOSED** & likely to remain closed for 2020, but we are exploring options
- **ONLINE EDUCATION HAS BEEN FAST-TRACKED** but students don't see the value for money
- **OUTBOUND STUDENT MOBILITY IS ON HOLD** with domestic students eager to take up opportunities to go overseas



COMMENCE

DON'T LOSE TIME

IS IT SAFE?

**WHEN WILL BORDERS
REOPEN?**

VALUE?

DEFER

WAIT FOR FACE TO FACE

**WILL I FALL BEHIND PEER
GROUP?**

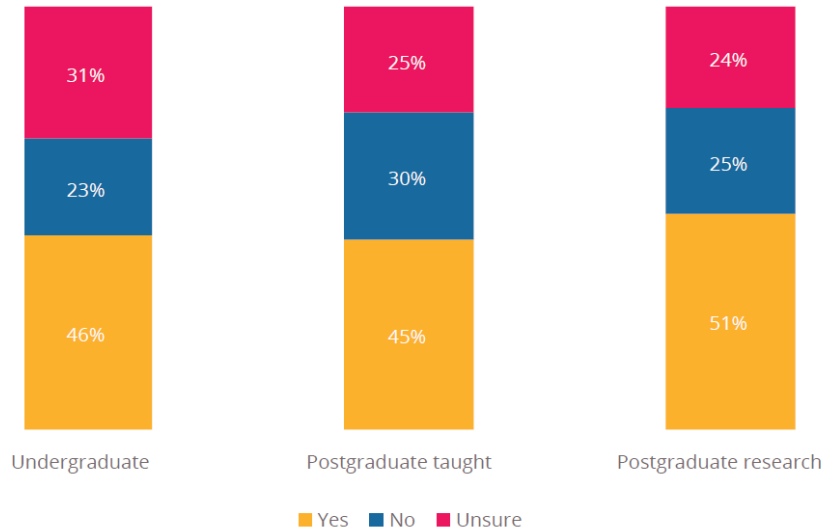
WHAT WILL I DO INSTEAD?

**IS THIS A QUESTION
OF VALUE?**





If starting your studies this academic year meant doing the beginning of your course online, would you be interested in this?

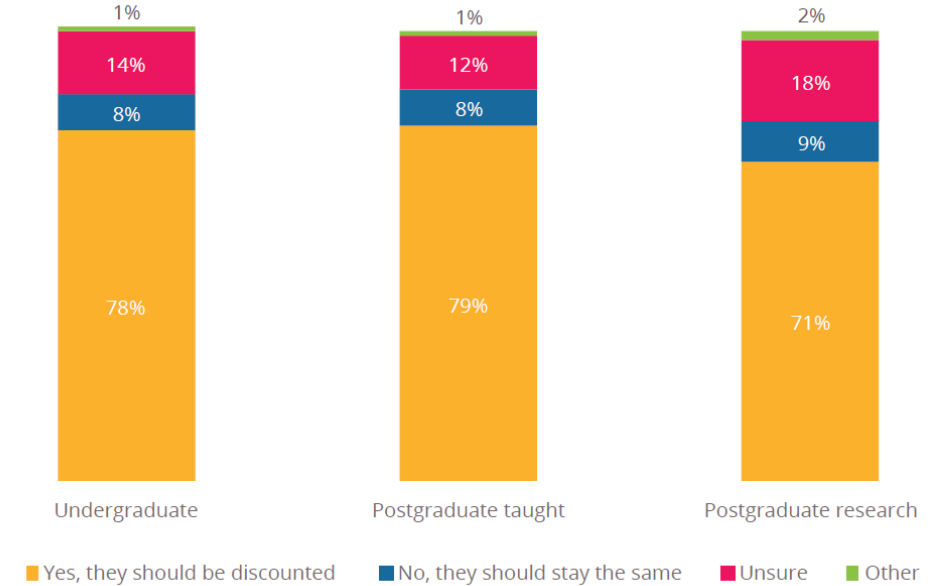


While responses are similar across the student groups, we can see that postgraduate research students would be slightly less averse to starting their studies online.

If prospective international students were to start their studies online in the upcoming academic year, the majority believe that tuition fees should be discounted as a result.



If you were to start your studies online until you're able to travel for face-to-face teaching, do you think this should affect tuition fees?



This overwhelming majority demonstrates that prospective international students clearly see greater financial value in the on-campus experience.

Deloitte Access Economics

Growth and
opportunity in
Australian
International
Education

A report prepared for
Austrade

December 2015

**BIGGEST GROWTH
OPPORTUNITY FOR
AUSTRALIAN
EDUCATION PROVIDERS
IS IN BORDERLESS
EDUCATION**



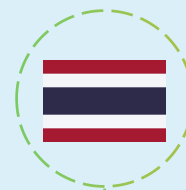
UON REFOCUSES

BORDERLESS
DELIVERY



UON SIGNS AGREEMENT WITH NURTURE

A TWO DEGREE
IN-COUNTRY
DELIVERY MODEL
CREATED



BINUS

LAUNCH OF OUR
SECOND
PARTNERSHIP IN
INDONESIA



2015

2016

2017

2018

2019

2020

FUTURE

DELOITTE REPORT

THE SECTOR
URGED TO THINK
ABOUT
BORDERLESS
EDUCATION



NURTURE

UON DISCUSSES
A NEW MODE OF
EDUCATION
WHICH ENABLES
OUR MISSION



UTCC

LAUNCH OF OUR
FIRST
PARTNERSHIP
WITH UTCC



ASEAN

3 MORE
PARTNERS FOR
UON



THINK / CONSULT / VENTURE

RETHINKING HIGHER EDUCATION WORLDWIDE

/
*We are proud to be the creators
of Goal Business Education*



Our University partners



UTCC iSM



About us

- A group of International Higher Education and Business School experts co-founded by Stephen Healy and Professor Angus Laing.
- **The Founders:** In addition to Stephen Healy, Professor Angus Laing current Dean of Lancaster University Management School and Former Chair and then Council member of the Chartered Association of Business Schools in the UK.
- **Academic and commercial Higher Education Perspectives and mission:** A unique combination of global demand and supply side expertise and perspectives as they relate to business education worldwide.
- **Responding to trends and demands:** Focused on rethinking the global delivery of world class business education and venture development.
- **Venture Start Up:** Raised start up financing and operating the Goal Business Education global network venture with University of Newcastle Australia as launch validation partner with first market launch in Bangkok with University of the Thai Chamber of Commerce in 2019.

About me

- **Stephen Healy**, 25 plus years in UK, US, Australia, China and ASEAN International Higher Education in public, private and start-up context.
 - Started journey in 1994 with Distance Learning unit of the University of London looking at global delivery partnership and moving provision online.
 - 3 years in China with British Council as EducationUK Brand Manager.
 - 7 years living in Thailand, first as Director Education for British Council Thailand, and as a Founder of a consultancy company servicing Thai and International University and Government clients.
 - 10 Years as one of the founding Directors and Executive Vice President, Group Strategy and Partnerships for INTO University Partnerships, a UK based company University partnering and global student recruitment and distribution organisation that created joint venture partnerships with University in the UK, USA and China. Company now valued in excess of USD\$400m in 2018.
 - Co-Founded Nurture HE Group in 2017.

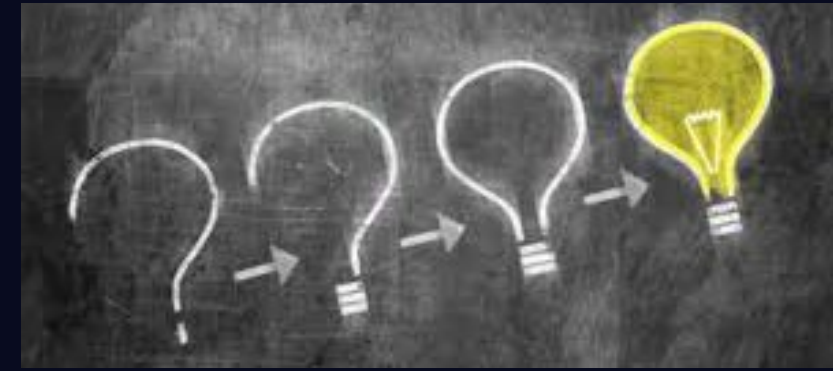
Navigating the 21st century norm of uncertainty,
digitization, globalisation....now heightened with
disruptions and deceleration presented by COVID 19



For universities and colleges worldwide the challenge is avoiding the new Kodak moment....



Student Decision Making for higher education and international student mobility in a COVID 19 world



- *General uncertainty and tolerance of current situation to understanding this is the new normal. A big part of this has been the online switching by universities in Australia and worldwide...panacea or problem?*
 - *Not all students are influenced by the same factors, segmentation is important particularly between Undergraduate and Postgraduate student expectations and needs.*
 - *Just because it can go online, doesn't mean they want it and certainly not at the same price.*

The problem we were
trying to solve back in
2018...as relevant in
new as the old
“Normal”

By 2025, UNESCO forecasts the number of students going to University will double, exceeding **285 million worldwide**. worldwide evidence that students, parents and employers are increasingly discerning and seek more than a quality industry worth **nearly USD\$2 trillion globally and over £25 billion for UK Universities rising to £90 billion for the wider UK**

Delivering **world class credentials, value and future returns, along with building networks of influence** are consistently and expected by students, parents and employers worldwide.

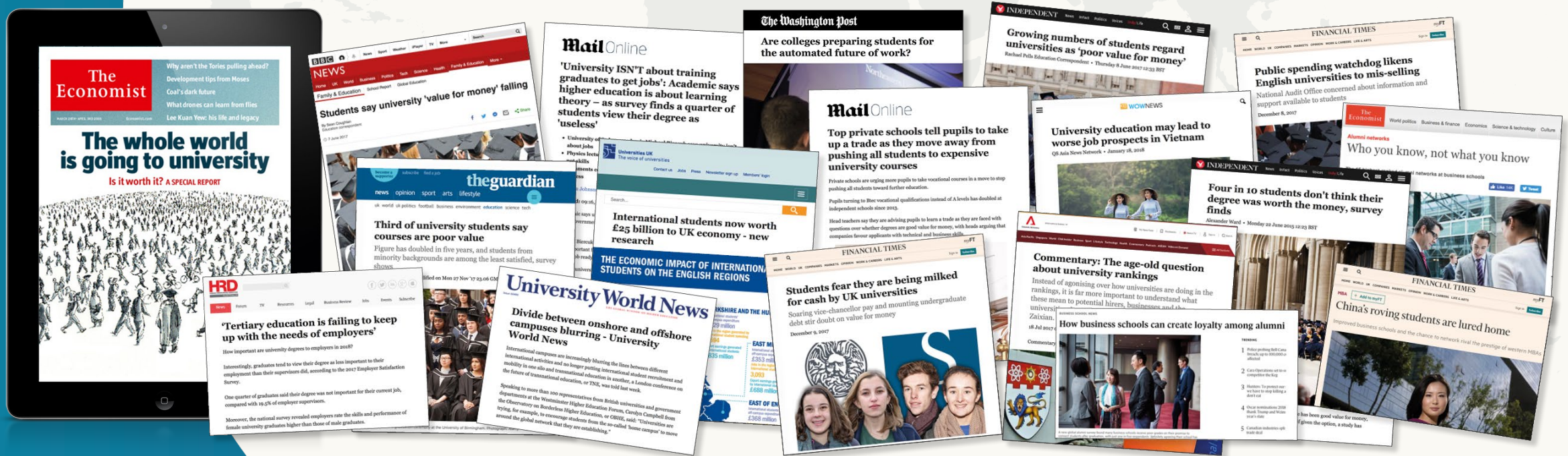
This is of critical importance in Business Education, where one in four students worldwide undertake their studies. Traditional online models have proliferated locally and moved across borders but they are not able to scale and deliver what r

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Status



Returns



Community



**Nurturing the aspirations of our learners and
University partners by creating a global network
connected by world class business education**

OUR PARTNERSHIP IN THAILAND: MISSION AND GOALS

- **For Thai and International Students:** New and leading standards of teaching and learning; new opportunities for career and entrepreneurial progress; and affordable.
- **For University of the Thai Chamber of Commerce (UTCC):** Build local capacity and quality in an ambitious and aspiring Thai University to become a national and regional leader. Drive reputational growth through alignment and delivery to UON and AACSB standards.
- **For UON:** Extend UON's mission, reach and standards and engage with student talent who would otherwise not be reached as well build new stakeholder relationships with private and public sector.
- **For Industry:** Engage and build confidence in the quality, skills and agility of graduates and professionals from local University programs.
- **For leadership in Quality:** Ensure compliance and standard setting with national bodies in Australian, Thailand and internationally with the AACSB Business School benchmarks.

AIM HIGHER. DARE TO BE DIFFERENT.

Two Degrees, One Program, Bangkok, Thailand.

Transfer options to study in Australia available.

Our Programs in 2020/21 Academic year:

Undergraduate Programs:

- Bachelor of Business Administration 
- Bachelor of Business 
- Bachelor of Accountancy 
- Bachelor of Commerce 

Postgraduate Programs:

- Global MBA 
- Masters in Innovation Management and Entrepreneurship 
- Global MBA 
- Masters in Professional Accounting 

Duration, fees and scholarships:

- Undergraduate study plans over two, three, four years in Bangkok
- Undergraduate approx USD \$32,000 tuition fee for whole degree program in Thailand
- Postgraduate study plans over 18 months, 24 months or 30 months in Bangkok
- Postgraduate approx USD \$17,000 tuition fee for whole program
- UTCC and Goal Business Education scholarships available

**ENROL NOW
FOR 2020/21
ACADEMIC
YEAR ENTRY!**

August, October 2020
and January 2021
semester starts

COVID-19 has simply amplified the desire and worries amongst students



- **Status:** If I get an online degree from Australia and don't go there, what does that mean? Yes online, but what is the status? If I study locally, will that help with transfer study options? Does local studies or other choices offer the same global recognition and status?
- **Returns:** Is this good value? Will it get me to where I need to be on competition? Online same price as face to face? What about internships and work experience?
- **Community:** Am I able to get the connections and networks if I can't go to Australia to study? If I stay local or regional, can I still get the same connections as if I went to a major education and economically developed country?



TOP 10 UNIVERSITY IN AUSTRALIA¹



THE UNIVERSITY OF
NEWCASTLE
AUSTRALIA

In partnership with Goal Business Education and the International School of Management, University of Thai Chamber of Commerce (UTCC), our business undergraduate and postgraduate programs are available at the UTCC Bangkok Campus.

FIND OUT MORE [IC.UTCC.AC.TH/COURSE/](https://ic.utcc.ac.th/course/)

CRICOS Provider 00109J | ¹QS World University Rankings 2020

QS WORLD UNIVERSITY RANKINGS 2020

World ranking of leading BBA International Programs available at Universities in Thailand

#207 University of Newcastle Australia
(two degree partner to UTCC)

#247 Chulalongkorn University

#314 Mahidol University

#601-650 Thammasat University

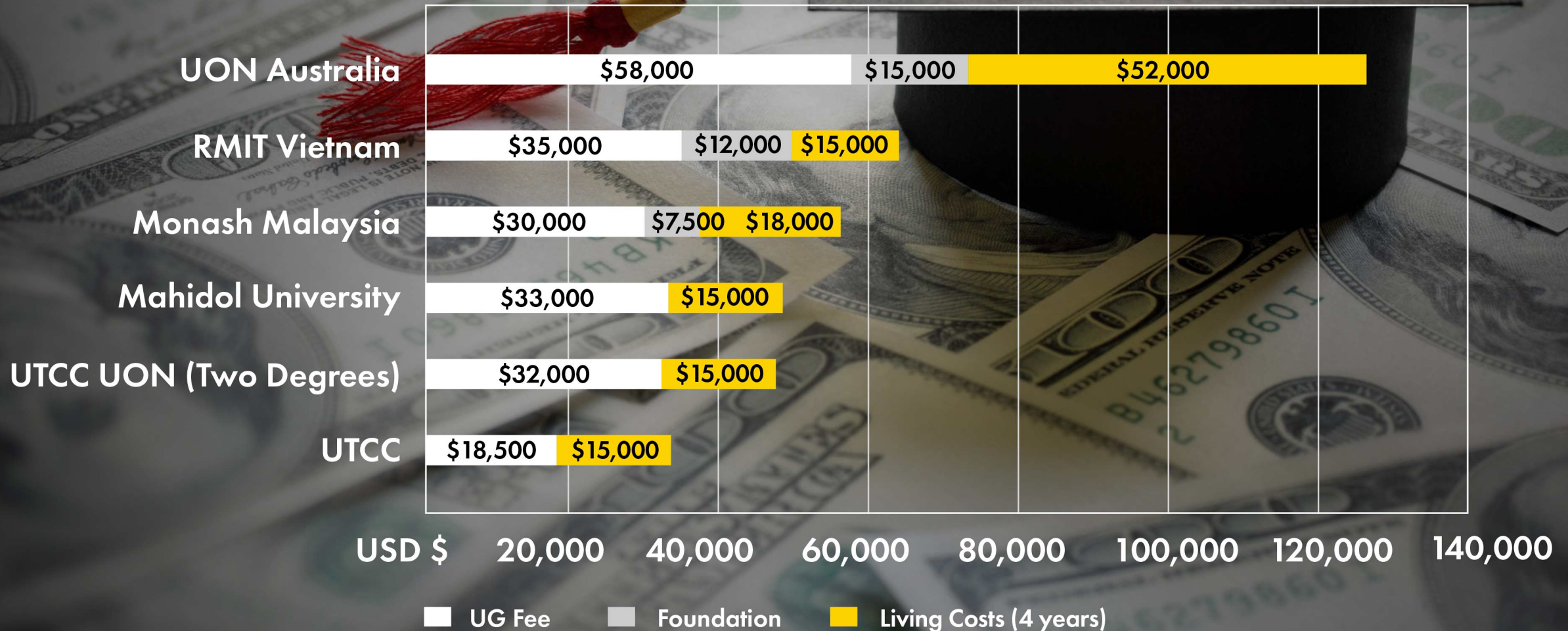




**STUDY AND LIVE
IN BANGKOK
GRADUATE IN
NEWCASTLE
AUSTRALIA**

**APPLY
NOW!**

4 YEARS UNDERGRADUATE DEGREE PROGRAMS: TOTAL TUITION AND LIVING COST COMPARISON



Thank You

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