Indonesia's market access models

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Business models and approaches used by education providers to access Indonesia's market

Findings: Three-tiered commercial pathway models:

3. Joint-Venture

Higher-risk, more complex with current regulatory limitations

2. Strategic Partnerships

Higher risk strategy aimed at broader market with local partner and deep relationships playing an important role

1. General Partnerships

New entrants use as a soft-landing, low-risk market entry strategy

Three underpinning elements

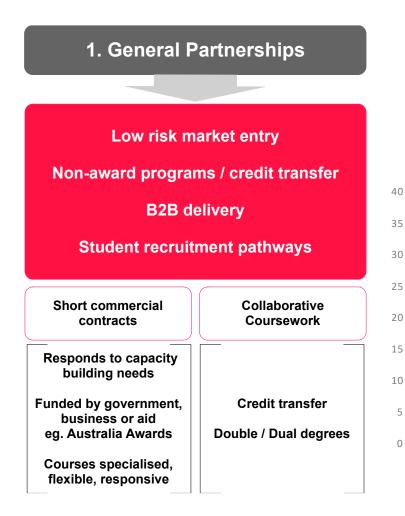
contribute to success:

- Relationships & networks
- Right partner
- Institutional strategy alignment

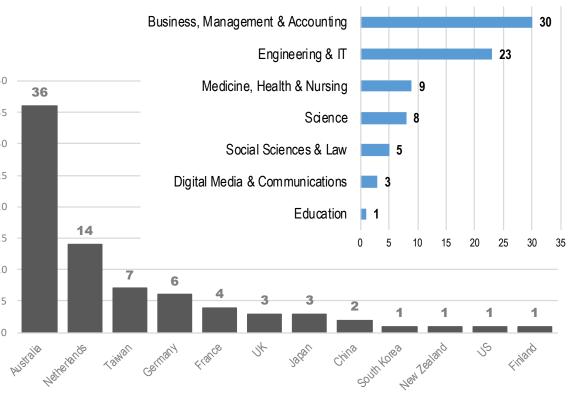
Approach: 41 interviews, 18 case studies - higher education, VET, ELICOS, schools & EdTech



Some education providers commonly use general partnerships as a softlanding, low-risk market entry strategy

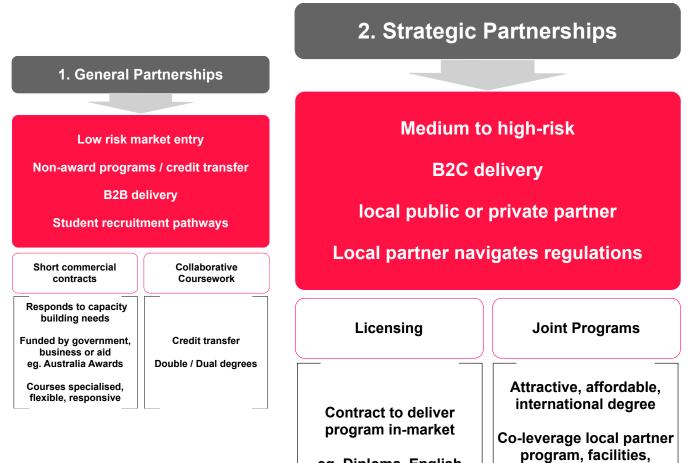


Top countries with higher education double / dual degree arrangements in Indonesia - 2017





Strategic partnership is the second most common form, higher risk, aimed at broader market, local partner and deep relationships becomes more important



eg. Diploma, English Language, Foundation

Fly-in-Fly-out Teaching

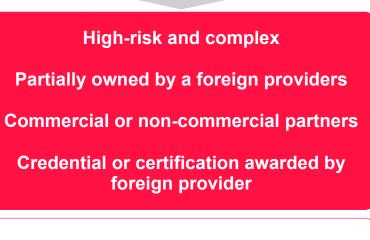
student support



Joint-venture partnership is higher-risk, more complex with current regulatory limitations

3. Joint-Venture

1. General Partnerships 2. Strategic Partnerships Low risk market entry Medium to high-risk Non-award programs / credit transfer **B2C delivery B2B** delivery local public or private partner Student recruitment pathways Local partner navigates regulations Short commercial Collaborative Licensing Joint Programs contracts Coursework Responds to capacity Attractive, affordable, building needs international degree Contract to deliver Funded by government, Credit transfer program in-market Co-leverage local partner business or aid program, facilities, eg. Australia Awards Double / Dual degrees eg. Diploma, English student support Language, Foundation Courses specialised, Fly-in-Fly-out Teaching flexible, responsive



Not for Profit Foundation

Require Government permit or license

Establish as not-for-profit foundation

Local education partner

Prioritise employment of local lecturers



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