



INTERNATIONAL EDUCATION CONFERENCE

3-4 December 2019

Changing Gears for a New Future
Transnational education and other opportunities
in South Asia

#IES2019

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SOUTH ASIA OVERVIEW

EXPLORING BANGLADESH, SRI LANKA AND NEPAL

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South Asia Digital Landscape

803 Mn - Internet users with 42% penetration. South Asia is the second largest region in the world

30% (108 Mn) - of the total Global increase in Internet users on account of India and Bangladesh

Twice - as many new internet users in India as in China

48% - Mobile's share of internet usage, almost doubling in five years

450 Mn – Number of active Social Media Users, at only 24% penetration

53% - Use Ad-blockers in India, the second highest in the world

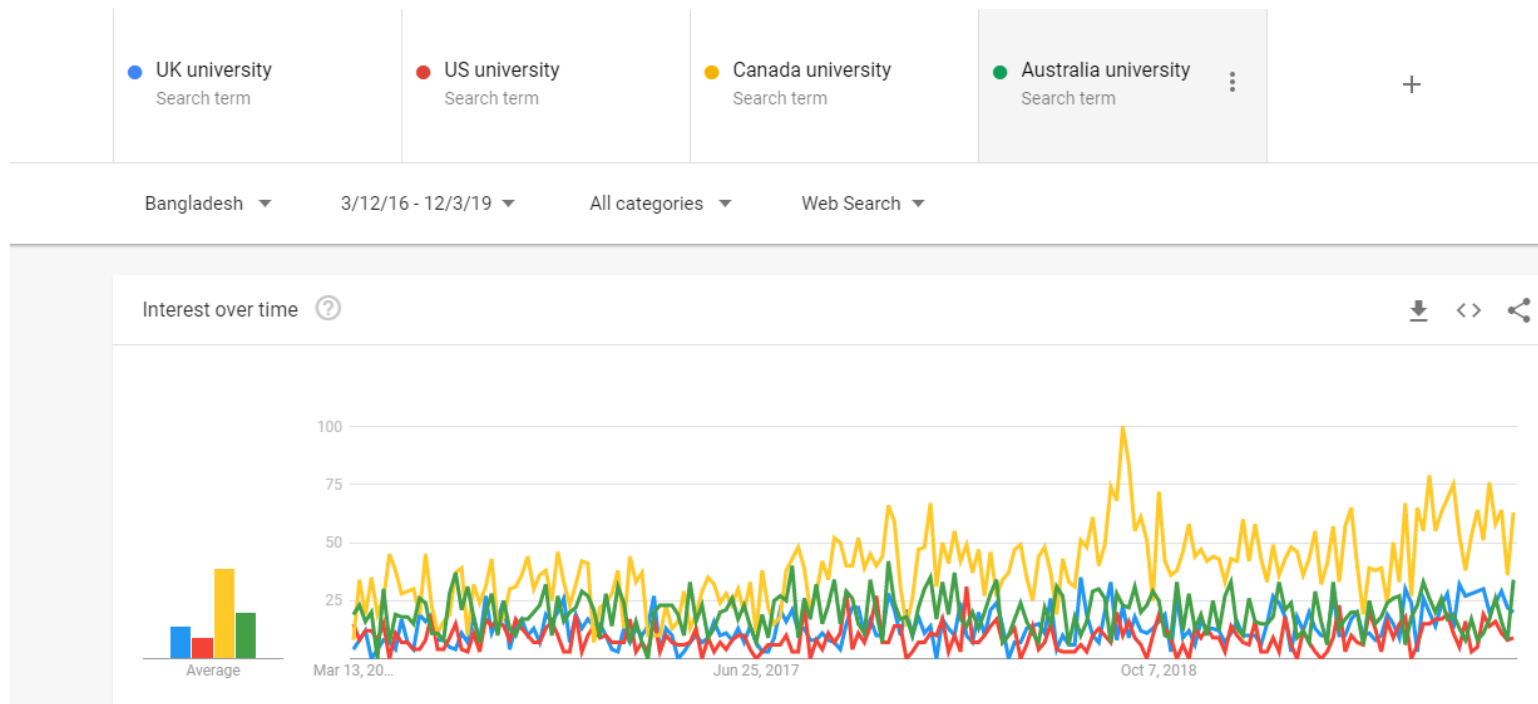
Bangladesh

163 Mn Population 30% - Youth 8% GDP growth

- £2000 Mn - Increase in expenditure on education
- 1,482 Q3 visas- growth of 20.8%
- 1Mn - Students looking towards a UG course, 1600 from A – level schools
- 58K - Students in 2017 at tertiary level studying abroad – 2540 are in the UK

Economic growth and a shift in share away from the UK has seen students in other destinations grow since 2013. In addition to traditional competitors, China and Malaysia are major study destinations

Bangladesh-Google Trends



Bangladesh TNE

- The new Cross Border Higher Education (CBHE) policy presents fresh opportunities for UK HEIs
- Foreign HEIs can open full campuses, study centers, branch campuses or partner with local institutions
- Local institutions actively seeking partnerships with foreign HEIs.
- There are providers of level 5 qualifications who are looking for potential partnerships for final year top-up.
- Bangladeshi students are receptive towards branch campuses

Sri Lanka

21 Mn Population 23% - Youth 3.5% GDP growth

- £160 Mn - Increase in expenditure on education
- 521 Q3 Visas –growth of 7.1%
- 2.2% - Government expenditure on University education
- 15 Universities across 623 departments
- 163K – Students eligible for UG courses, 20% only admitted–maximum in arts, commerce, bio science, ph. science, technology
- 20K - Students in 2017 at tertiary level studying abroad – 1225 are in the UK

Sri Lanka-Google Trends

● UK university
Search term

● US university
Search term

● Canada university
Search term

● Australia university
Search term

+

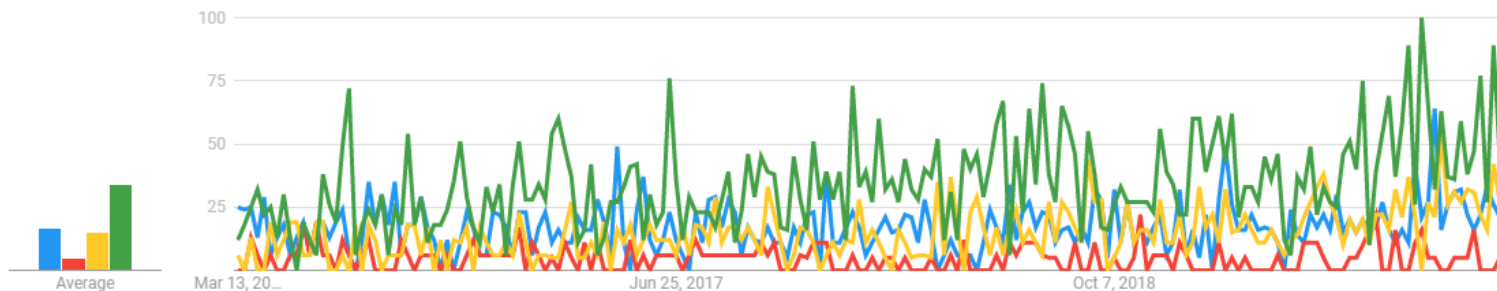
Sri Lanka ▾

3/12/16 - 12/3/19 ▾

All categories ▾

Web Search ▾

Interest over time ⓘ



Sri Lanka - Opportunity

Some key areas from the President's manifesto to help inform your strategy in Sri Lanka

- A student centred education system, replacing the current examination centred education system
- Establish an aviation university and a nautical university
- All universities to be converted to Smart Learning Universities
- Significantly increasing the current student intake into state universities
- Focus on technical education through expansion of learning opportunities

Sri Lanka – TNE Opportunity

The TNE market continues to grow...

- **UK continues to dominate:** Over 40 universities and professional bodies offering UK programmes across 70 local institutes with 45000 students pursuing UK qualifications
- **Independent Commission on Quality Assurance** - Oversee QA in state and non-state sector by UGC

‘The local institutions that claim to be affiliated to foreign institutions will also have to maintain the standards of those foreign institutions in Sri Lanka. The commissions will also have powers to revoke the registration of an institution, for failure to maintain proper standards, including the syllabuses and teaching.’

Nepal

29 Mn Population 22% - Youth 6.3% GDP growth

- 20K - Increase in international students by 2027
- 79% - Nepali students study at Tribhuvan University
- Curriculum Development Centre at Tribhuvan University
- 44K - Students in 2017 at tertiary level studying abroad – 585 are in the UK, Australia (94%). India, US and Japan are the other destinations
- 400K - Students are in local curriculum, 3000 in A levels, 60 in IB, 30 active A level Schools including independent centres
- Popular subjects STEM, with math/computer science, physical/life sciences, and engineering.
- 487 Q3 Visas- 114.5% growth

Nepal-Google Trends

● UK university
Search term

● US university
Search term

● Canada university
Search term

● Australia university
Search term



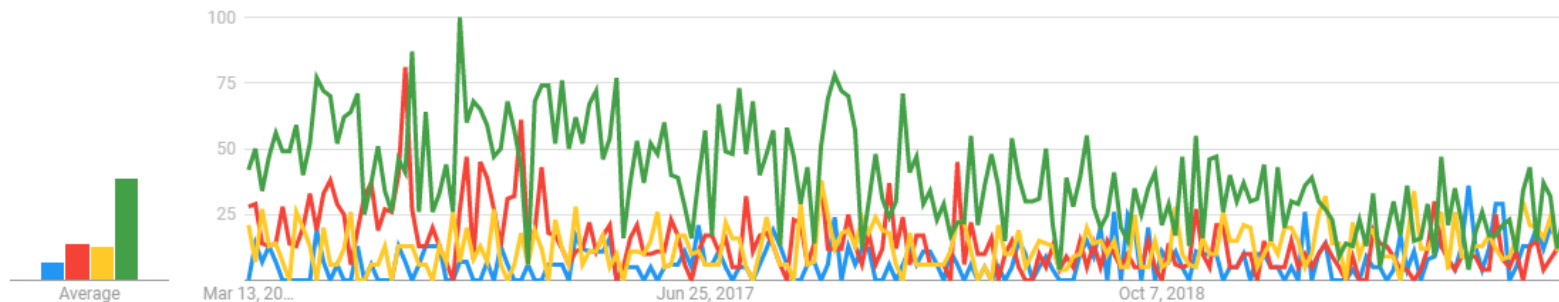
Nepal ▾

3/12/16 - 12/3/19 ▾

All categories ▾

Web Search ▾

Interest over time



Nepal Opportunities

- Existing links with a handful of local private universities offering UK accredited bachelors and Masters
- Opportunity in mobility with GIR
- TVET is important. 31 technical schools and polytechnics with hundreds of affiliated private TVET providers.



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EXPLORING PAKISTAN

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Pakistan at a glance

DEMOGRAPHICS



207M
POPULATION



\$304B
NOMINAL GDP

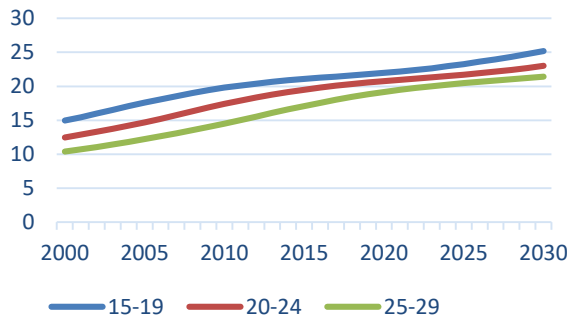
5.28%
GDP GROWTH RATE

\$70B
TRADE
(IMPORT + EXPORT)

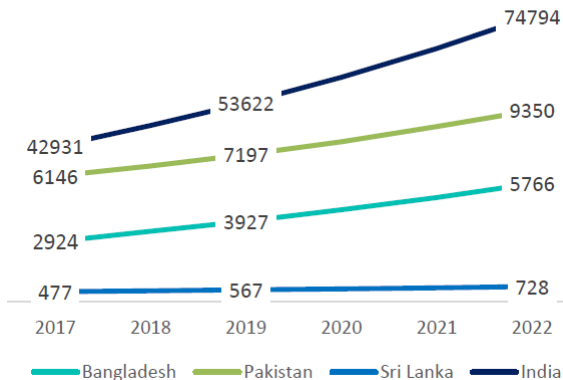


\$19.3B
FOREIGN
REMITTANCES

Population by age group (Mn)



Expenditure on Education - GBP million(s)



180 Universities
1.5 million students
85K Faculty

SOCIAL MEDIA

YouTube **100M**
DAILY VIEWS

30M facebook
USERS 23M MEN - 7M WOMEN

in **4.4M**
USERS

Instagram **3.6M**
USERS

Twitter **3.1M**
USERS

DATA USAGE

40M
SMART PHONE
USERS

42M
MOBILE
BROAD BAND
CUSTOMERS

55M
BROAD BAND
USERS

As security situation improves, many UK firms eyeing Pakistan

HEC Launches National Academy Of Higher Education

JUNE 13, 2019

Foreign tourists in Pakistan up 70% in 2018

17,823 arrived on tourist visas in 2018, compared to 10,476 in 2017

UN restores Islamabad's status as family station for its international staff

PAKISTAN

Pakistan elected as President of UNESCO's Education Commission

BUSINESS

Pakistan gets yet another positive news on the economic front

First British Airways flight to Pakistan in 11 years lands in Islamabad

Foreign Investment in Pakistan Increases as Security Situation Improves

'Thank you Pakistan', says Kensington Palace after British royal visit

Prince William and Duchess Kate shared memories of their maiden five-day visit to Pakistan

UK's new visa rules bring good news for Pakistani students

HEC, British Council launch Pakistan-UK education gateway

Higher Education Commission (HEC) Launches Roadshow To Highlight New Research & Development Framework

Pakistan to host Sri Lanka for two-Test series in December

Security situation improved drastically in 2018, report reveals

Higher Education Trends and Opportunities

Pak – UK Education Gateway – encouraging collaboration between universities

Higher Education Commission (HEC) Vision 2025 Access, Quality and Relevance

Growing interest in Transnational Education (TNE) – HEC Foreign Collaboration policy

Higher Education Commission Vision 2025

- HEC Vision 2025 is current strategy and road-map to support Pakistan vision 2025. Access, quality and relevance.
- To develop and nurture human resource that is at par with 21st century demands and contributes to the socio-economic development of Pakistan.

Access – 3.8 million
300+ universities

PHDs from 7,000 to 15,000

Bridge the gap between Academia and Industry

Tiered System (Research Excellence, Comprehensive and College System (AC, DAIs)

Excellence in research and innovation

Leadership, governance and capacity building

Increase HE Spending 0.2% of GDP to 1.4%

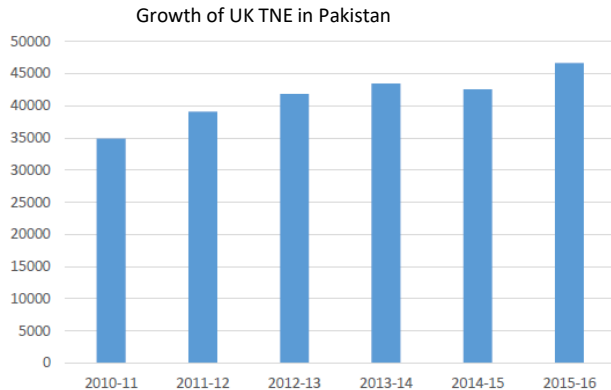
HIGHER EDUCATION COMMISSION Vision 2025

PAK UK Education Gateway

- The overall development goal of the UK-PK Education Gateway *is to strengthen and develop human resource capital through improved quality of higher education and skills development institutions in Pakistan.*
 - Innovative and collaborative research
 - Higher Education leadership
 - Quality assurance and standard setting
 - Distance learning and new ways of delivery of Higher Education
 - International mobility
 - Transnational education
- Review exercises (Leaderships, teaching and learning, governance, research) travel grants, research grants, mobility grants (long term grants for joined projects - faculty and student exchange)

TNE Landscape in Pakistan

- TNE has seen steady growth in Pakistan: 33% growth between 2012 and 2017.
- 4th largest host of TNE students after China, Malaysia and Singapore, over 40,000 students enrolled
- HEC Foreign Collaboration Policy - Launched in November 2018 – it sets out policy guidelines, criteria, procedures for collaboration with foreign universities including opening of campuses in Pakistan



HEC Approved collaborative partnerships with foreign degree-awarding bodies

ACCA Pakistan Chapter	Oxford Brookes University, UK
Roots College International	University of London, BPP University UK
Namal College Mianwali	University of Bradford UK
Riphah International University	The Northern Consortium NCUK
The Millennium Universal College	University of London, EdExcel, University of Creative Arts, University of Hertfordshire UK
Institute of Business and Finance Lahore	EdExcel HND Programme
SZALB University of Law	University of Nottingham

TNE in Pakistan – Challenges and Opportunities

Challenges	Opportunities
Professional accreditation (Pakistan Engineering Council, Pakistan Medical & Dental Council, Pakistan Bar Council etc.)	Market Size – huge potential for growth backed by HEC Foreign Collaboration Policy
Regulatory Framework – Quality of Education	Digital
Federal HEC and Provincial HECs	Short qualifications/courses/certificates
Competition	TVET
Disconnect between Schools, TVET and HE	Alumni and availability of trained faculty members



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EXPLORING INDIA

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India



3RD
LARGEST ECONOMY BY PPP



1.3
BILLION POPULATION



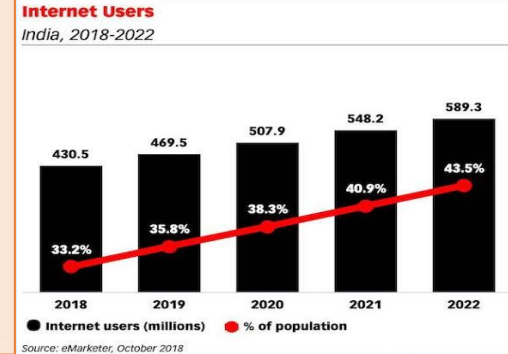
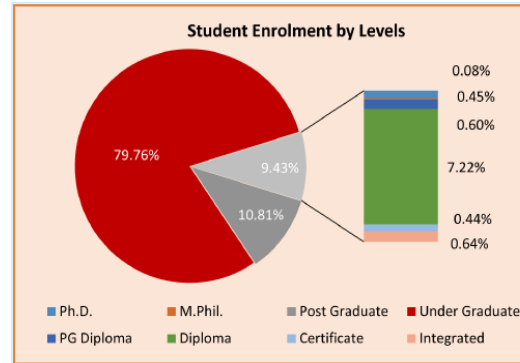
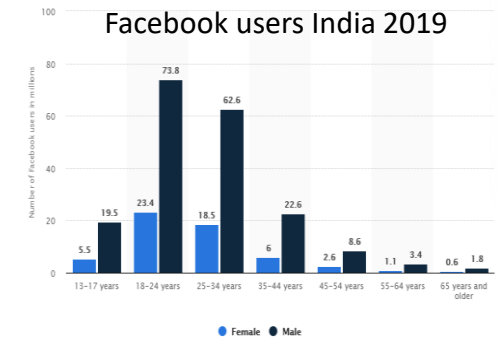
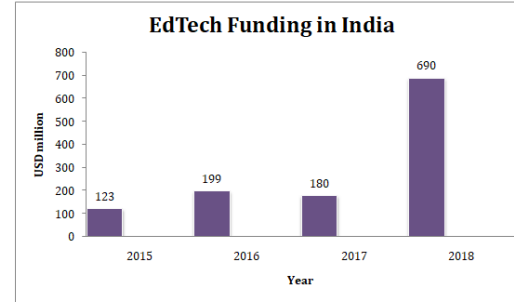
100 BN US \$
E-COMMERCE INDUSTRY BY 2020

3.6
TRILLION US \$
CONSUMER MARKET BY 2025

29 YEARS
(MEDIAN AGE)
YOUNGEST NATION BY 2025

2ND
LARGEST
ROAD NETWORK
5.5 MN KMS

99%
LITERACY RATE BY 2025



Partnership and TNE

Two main statutory regulatory bodies for HE partnerships

All India Council for Technical Education

Responsible for approval of
Engineering, Technology or
Business

University Grants Commission

Responsible for approval of
all other programmes



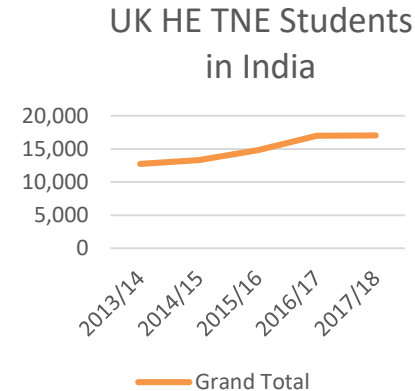
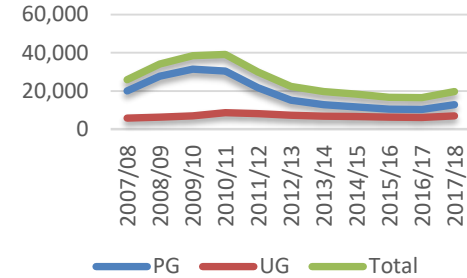
National Higher Education Regulatory
Authority (NHERA)

Opportunity for transnational (TNE) partnerships for UK universities

- The total number of students studying via TNE grew by 34% from 2013/14 to 2017/18 – though growth plateaued in 2017/18.
- 88% of UK TNE students in India are at Undergraduate level.
- The most common form of TNE delivery is ‘Overseas partner organisation’ (53%)

While degrees delivered by TNE are allowed, the regulatory conditions mean that qualification recognition remains a challenge

- Foreign institutions operate within a complex regulatory environment with up to six bodies involved in institution /programme approval - AICTE, AIU, UGC, NAAC, NBA and a range of professional councils.
- India also remains a price sensitive market.
- Only way currently is the dual degree programs



Internationalisation of higher education

- Twinning programs have been a source of differentiation for the private Universities but lack of the International qualification in India has restricted the growth
- **Inter University Centre for International Education:** IUCIE will be set up within selected Indian universities to support internationalisation of higher education in universities.
- Setting up of Indian campus by International Universities is an area that has received a lot of activity within the current government is also part of the new proposed bill on higher education

Session Takeaways- Top 5

Re-evaluate your strategy for Bangladesh, Sri Lanka and Nepal

Approaching Pakistan holistically

Geographically differentiate your strategy in India

Explore new channels for your outreach in South Asia

Go long term!



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Panel Discussion: Changing Gears for International Recruitment in South Asia

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