



INTERNATIONAL EDUCATION SERVICES

Reboot and Reload;
defining new futures for International Education in India

<https://education-services.britishcouncil.org>

Panel

- Barbara Wickham, Director, British Council India (Chair)
- Janaka Pushpanathan, Director South India (Speaker)
- Pratik Burman, Assistant Director Education Services, India (Speaker)
- Amarjeet Mutneja, Student Recruitment Officer, Warrick University (Speaker)

Flow

- Introduction
- Key indicators and drivers for change
- Student mobility
- Graduate Immigration Route
- Case study: Growth in tier 2 markets
- Practitioners perspective/challenges
- Summary

India



3RD
LARGEST ECONOMY BY PPP



1.3
BILLION POPULATION



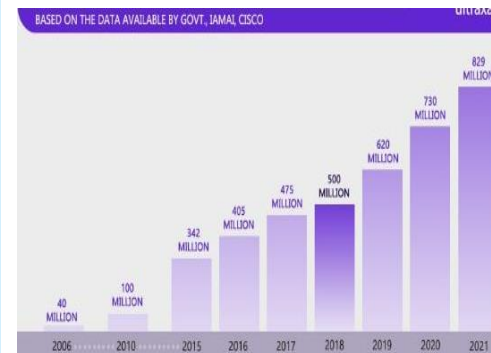
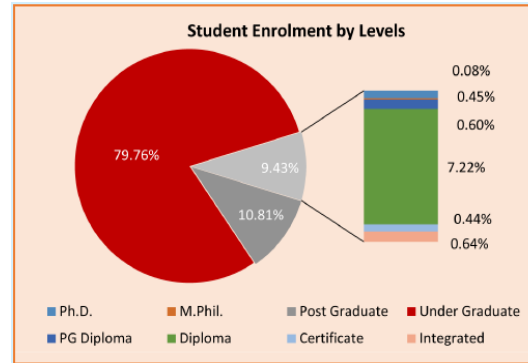
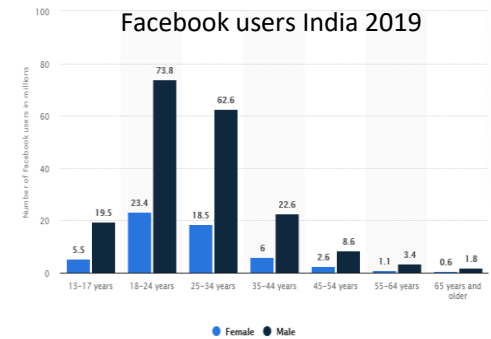
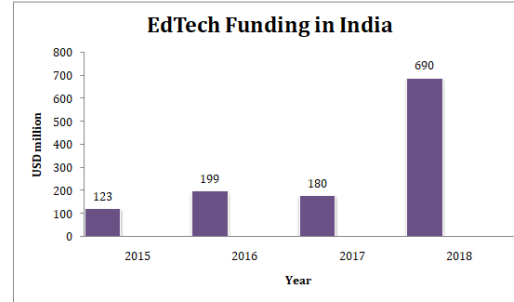
100 BN US \$
E-COMMERCE INDUSTRY BY 2020

3.6
TRILLION US \$
CONSUMER MARKET BY 2025

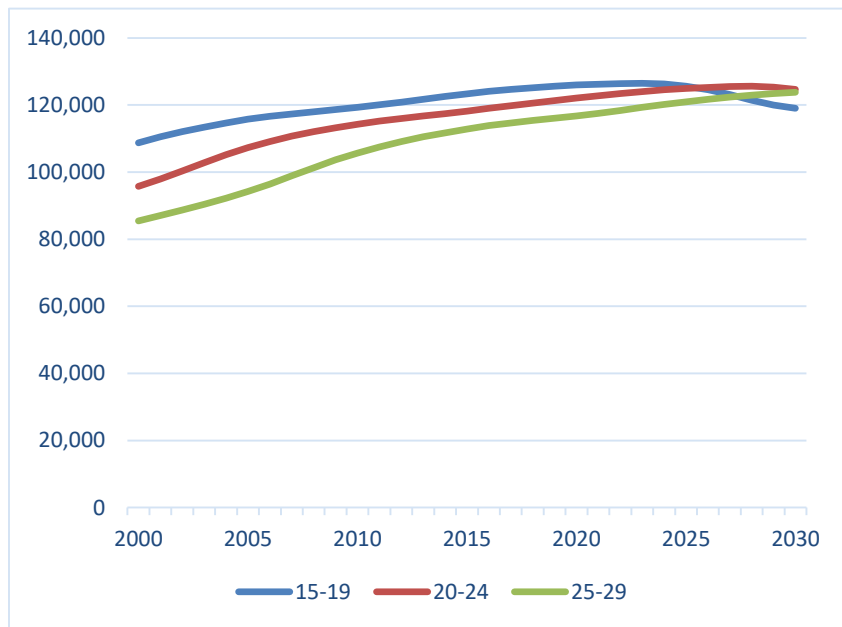
29 YEARS
(MEDIAN AGE)
YOUNGEST NATION BY 2025

2ND
LARGEST
ROAD NETWORK
5.5 MN KMS

99%
LITERACY RATE BY 2025

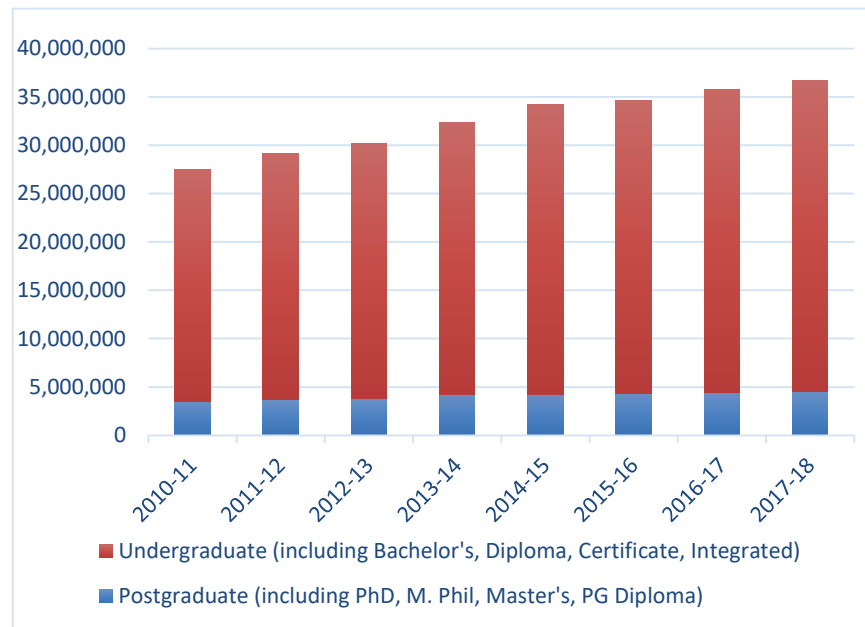


India is set to be the largest student market



Large student age population to peak within 5 years

<https://education-services.britishcouncil.org>



Postgraduate sector +34% since 2011

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Drivers of change in India



- 637 million internet users growing at more than 18%
- Highway construction crossed 10,000 kms during 2018-19, which translated to 30 kms a day
- Digital payment volumes in India are set to grow at over 20 percent each year over the next four years



- A growing middle class (shades of China)
- Aspirational population looking for opportunities beyond India
- Spending on tuition and hostel fees by Indians studying overseas has gone up by 44 per cent from \$1.9 billion in 2013-14 to \$2.8 billion in 2017-18

Higher Education sector

New National Education Policy – Higher education context

Governance

- Setting up of an apex body called Higher Education Commission of India (HECI)
- National Research Foundation (NRF) to be set by assimilating grants from various ministries, better governance, research and innovation

Internationalisation

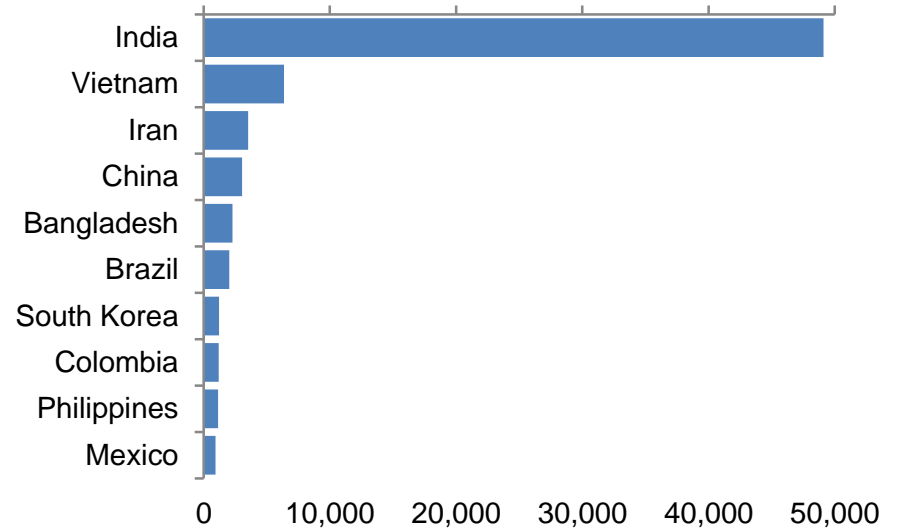
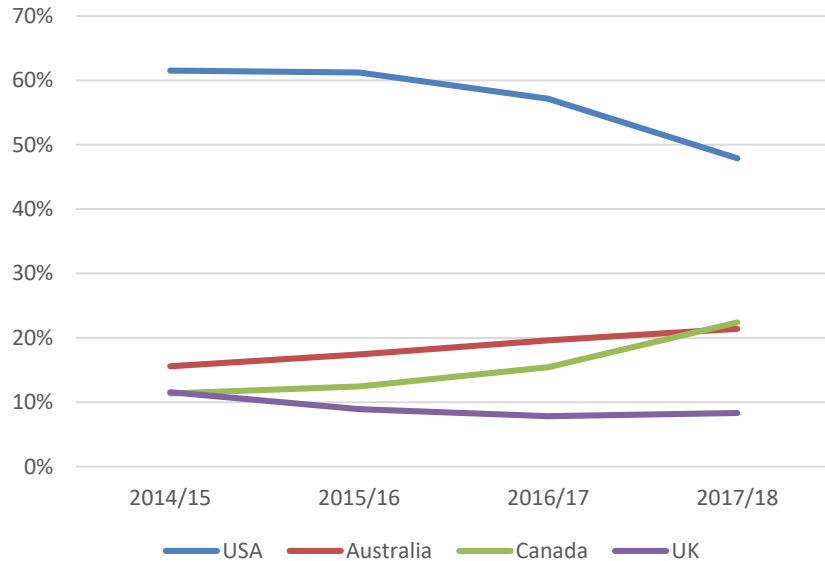
- Setting up of Global initiative of Academic Networks (GIAN) to bring in pool of scientists and researchers
- Focus on global standards in skill-based training for international markets – National Skills Qualification Framework
- Study in India – bring foreign students in India, reforming the regulatory system

Quality of Education

- Institutes of Eminence (ten public and ten private institutions) to be given with greater autonomy – 2 of them are green filed projects
- Swayam – MOOCs for giving access to higher education by bridging the digital divide
- Intent on ensuring International Universities have an opportunity to set up local campus

Student Mobility

Canada doubled its market share in 3 years



Indian students out number others

Post study work opportunities

Pre Graduate Immigration Route

ATTRACTION RANKING	IN-STUDY WORK	POST-STUDY WORK (Yrs)	MINIMUM STUDY (Yrs)	BACHELOR	MASTERS (Coursework)	PhD
1. NEW ZEALAND	Yes	1–3	1	3	3	3
2. CANADA	Yes	3	2	3	3	3
3. AUSTRALIA	Yes	2–4	2	2	2	4
4. GERMANY	Yes	1.5	n/a	1.5	1.5	1.5
5. UNITED STATES	Yes	1*	1	1	1	1
6. NETHERLANDS	Yes	1	1	1	1	1
7. IRELAND	Yes	0.5–2	2	0.5–1	2	2
8. SWEDEN	Yes	0.5	1	0.5	0.5	0.5
9. UNITED KINGDOM	Yes	0.3–1	1	0.3	0.3–0.5	1

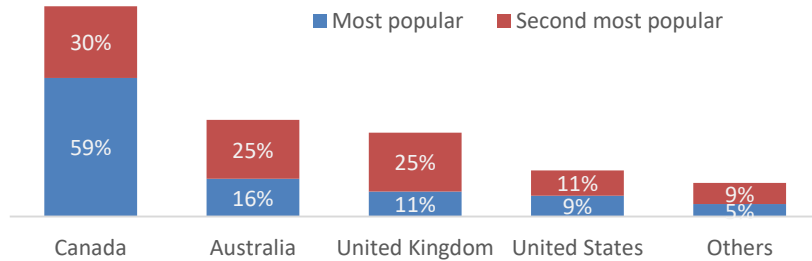
Additional 2-4 years PSW in you are not in Melbourne, Sydney and Brisbane

2 years PSW through GIR

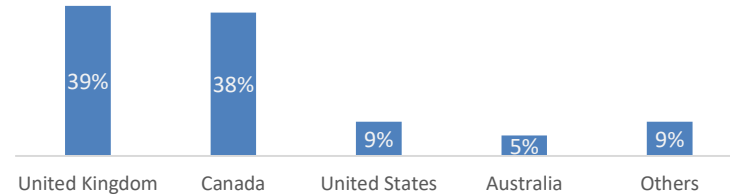
* +2 years for STEM graduates.

What do the agents feel about the UK?

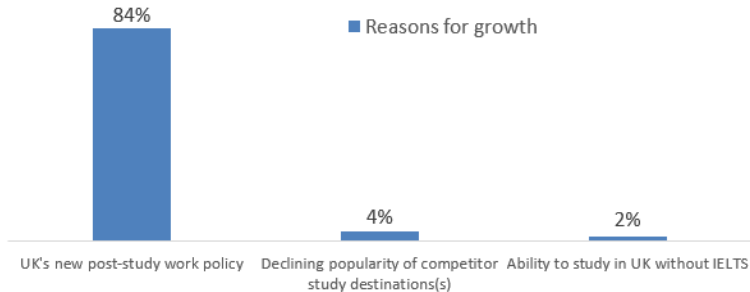
Most popular and second most popular destination?



Destinations with the strongest growth expected?



What do you think will be the primary factor driving growth in UK applications?



- UK specific agents are niche and smaller players compared to ones focusing on Canada and Australia
- Most Agents with the highest of registrations to other destinations are now looking to offer UK as an option
- There is limited knowledge as well as partnerships that the sector has with these players
- In the last 5 years we have seen a significant rise in the regional agents

Graduate Immigration Route: Opportunities and Challenges

Changing consumption patterns of India

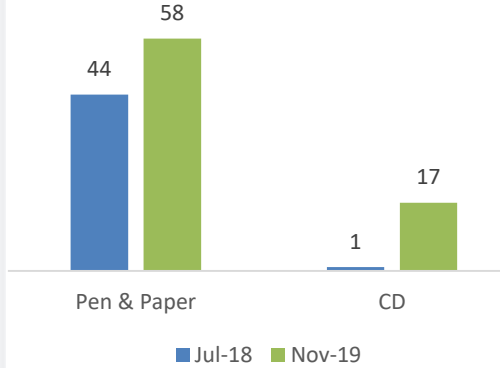
Screen time

Average time spent watching videos is expected to rise to 67 minutes/day by 2019

Time spent viewing video in India (in minutes)



IELTS testing locations in India



Based on learner activities on Coursera

US 7.8 mn India 3.4 mn China 2.3 mn

Oberio

TikTok App Conquers the Teens of the World

41%

of Tik Tok users are aged between 16 and 24. (socialwealthindex, 2019)



Factors Prompting ecommerce Companies to Focus on Mobile Commerce

A Changing Consumer Shopping Behaviour*

91%

91% have researched a product or service on their phone

B More Business Coming From Tier2/Tier3 Cities

8%

Proportion of ecommerce's addressable market in top 8 cities

30% -50%

Rise in ecommerce transactions in Tier 2 and Tier 3 cities

Festive Fireworks

Over \$3.5B GMV clocked by Amazon and Flipkart in last six days, according to estimates

2x Increase in number of transactions in tier-III cities, says Flipkart

15X Growth in smartphone purchases on Amazon

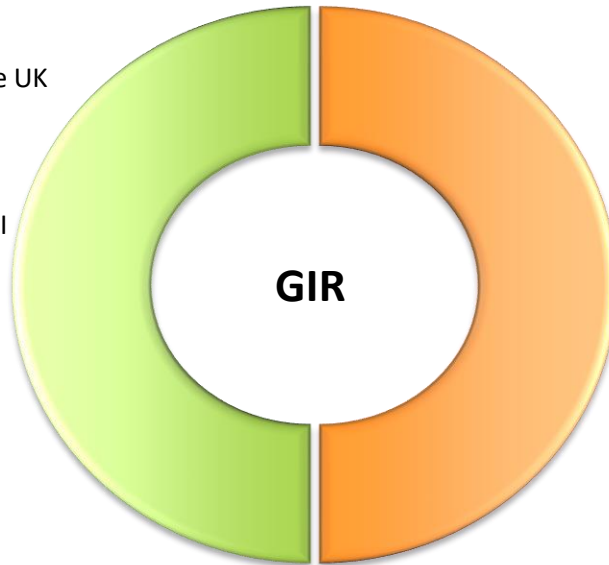


50% Growth in new customers, Flipkart says

Amazon received orders from **99.4%** of pin codes in the country

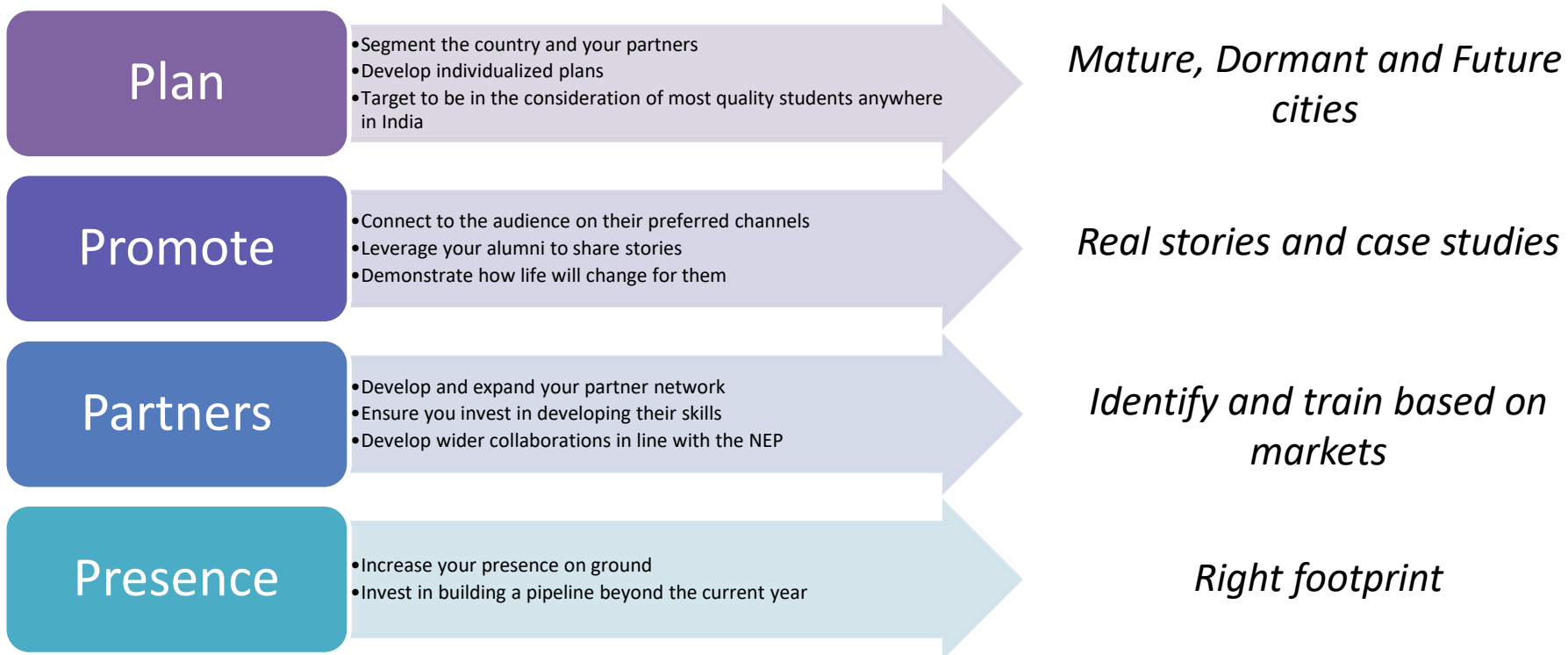
Opportunities and Challenges due to GIR

- Provides much needed competitive edge to the UK
- Helps us attract quality students
- Value conscious Indian parents get a better ROI
- Students get to experience global work culture to help them differentiate on their return
- Activates dormant markets
- Very positively received by the stakeholders



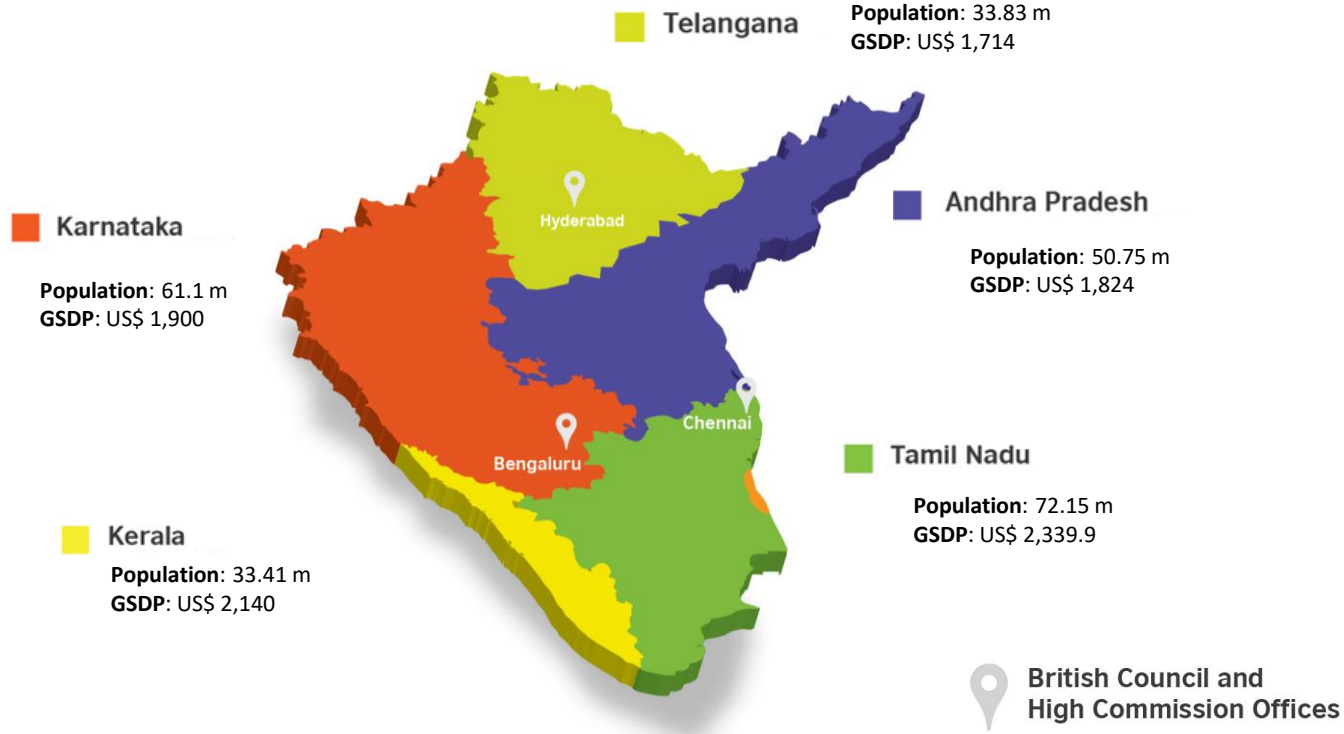
- More than ever the need to maintain quality intake
- As newer territories begin to take interest challenge of educating the local stakeholders before the Sep 2020 intake
- Need to educate GIR is not PSW
- Setup support on campus to help students leverage opportunities due to GIR
- Take the UK brand as well as your individual brands to the grassroots
- Setup new relationships based on the changing dynamic of student mobility in India

Road ahead to leverage this opportunity

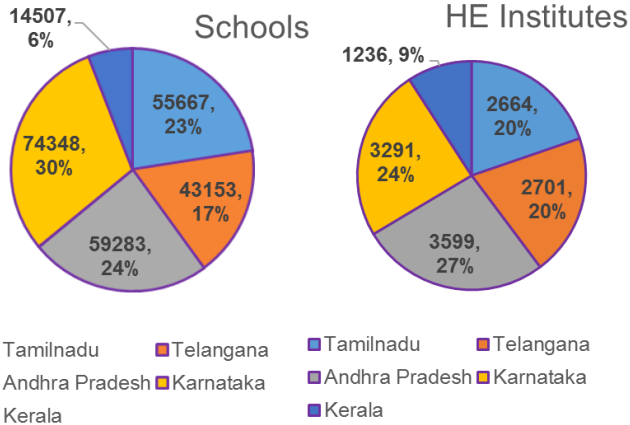


Case study: Growth in Tier 2 markets in South India

Overview Context of South India



Education, ECONOMY and ENTERPRISE



Education

- Literacy rate of SI (80%) is higher than India's literacy rate (74%)
- 73 languages are spoken in SI – Tamil, Telugu, Kannada, Malayalam, Urdu, Konkani, Tulu
- Home to 176 HE Universities
- An average south Indian family spends over 52% of their annual income for their children's education



Economy

- SI contributes about 53% of India's GDP every year
- 4 IT hubs – Hyderabad, Bangalore, Chennai and Trivandrum and 2 IT hubs in the rise – Kochi and Coimbatore export over 500 billion GBP of software services every year
- Chennai contributes to over 35% of India's automobile industry



Enterprise

- HDI of TN (0.784) and Kerala (0.708) is higher than national HDI (0.519)
- Highest sex ration with Kerala and TN being the top two states of the country
- Rich in linguistics, culture, tourism and information technology
- We have signed MoU with all the five states for collaboration and establishing partnerships in education and culture

Tier 2 Cities In South India

1/2

COIMBATORE

Population: 1.05 m
GDP: US\$ 260 billion
Literacy rate: 82.4 %
Schools: 85
Universities: 7
HEI: 268

CITY: COIMBATORE
STATE: TAMIL NADU

CITY: VISHAKAPATNAM
STATE: ANDHRA PRADESH

VISHAKAPATNAM

Population: 1.7 million
GDP: US\$ 43.8 billion
Literacy rate: 66.91 %
Schools: 303
Universities: 8
HEI: 143

TRIVANDRUM

Population: 2.42 million
GDP: US\$ 130 billion
Literacy rate: 92.66%
Schools: 181
Universities: 2
HEI: 59

CITY: TRIVANDRUM
STATE: KERALA

CITY: MYSORE
STATE: KARNATAKA

MYSORE

Population: 1.7 m
GDP: US\$ 2.30 billion
Literacy rate: 87.67%
Schools: 38
Universities: 4
HEI: 118

Tier 2 Cities In South India

MADURAI

Population: 2.94 million
GDP: US\$ 250 billion
Literacy rate: 90.91 %
Schools: 369
Universities: 47
HEI: 47

CITY: MADURAI
 STATE: TAMIL NADU

CITY: VIJAYAWADA
 STATE: ANDHRA PRADESH

VIJAYAWADA

Population: 1.58 million
GDP: US\$ 160 billion
Literacy rate: 80.58%
Schools: 125
Universities: 7
HEI: 59

KOCHI

Population: 2.11 m
GDP: US\$ 220 billion
Literacy rate: 98.5 %
Schools: 205
Universities: 4
HEI: 22

CITY: KOCHI
 STATE: KERALA

CITY: MANGALORE
 STATE: KARNATAKA

MANGALORE

Population: 622,556
GDP: US\$ 230 billion
Literacy rate: 93.72%
Schools: 105
Universities: 4
HEI: 44

Practitioners Perspective



I would like to study MSc Management


I am thinking about International Business

MBA!

MBA!!

My friend is studying Management, I want to study that too

I don't know what I want to do so I want to do Management

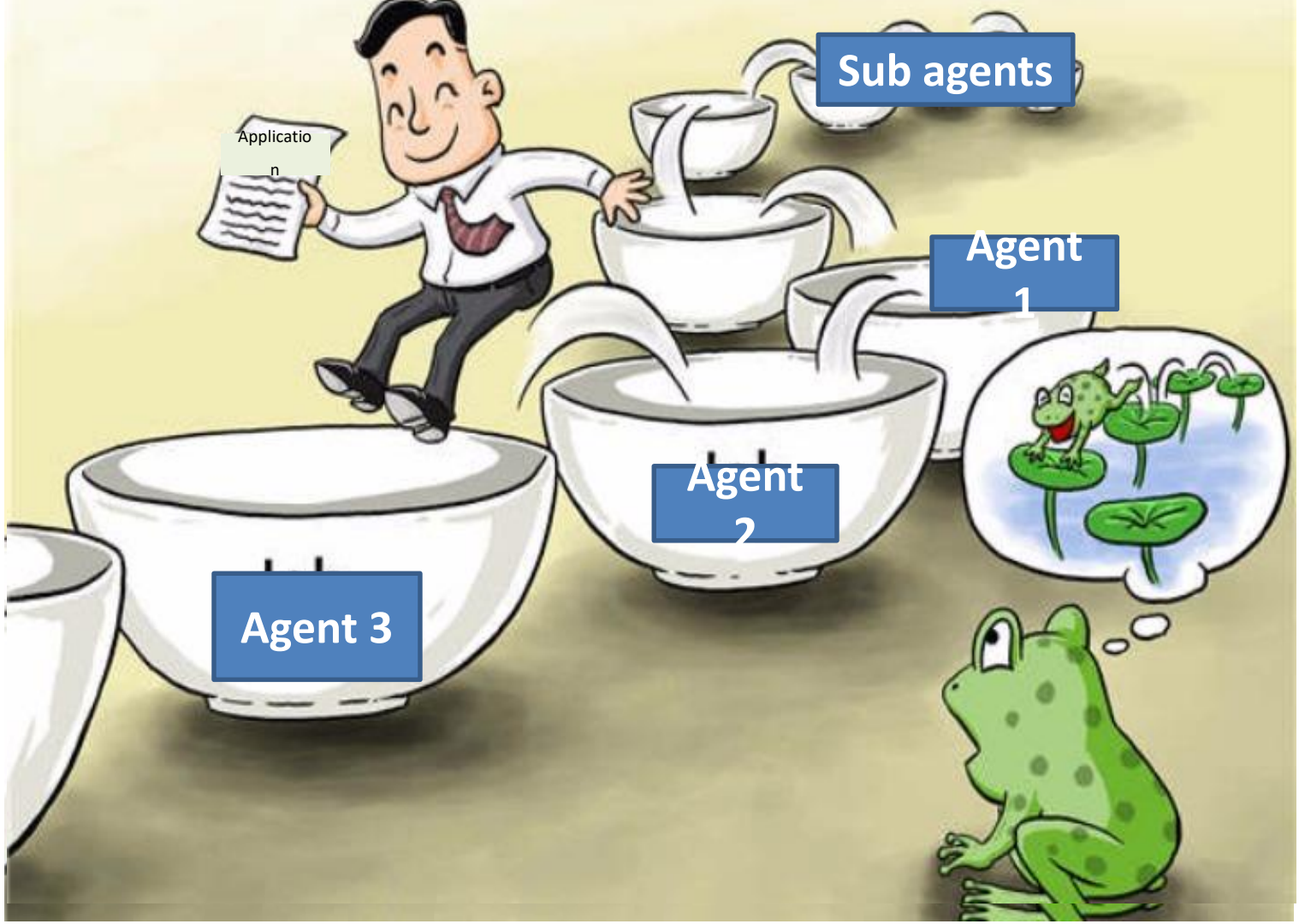


*I would like to study **Astrophysics**, can you tell me more about that course please?*

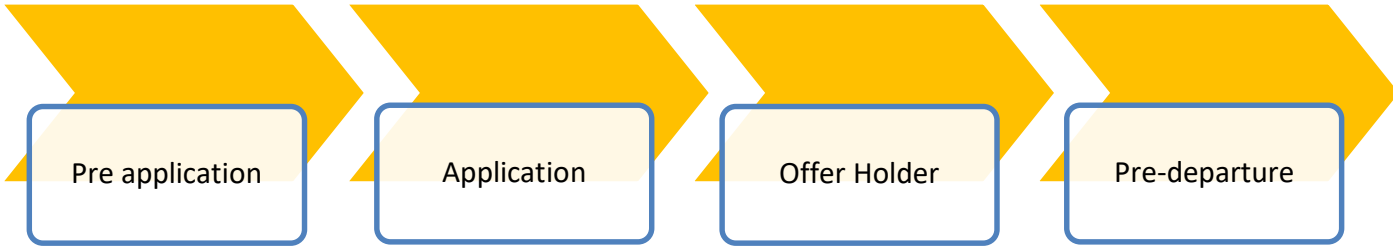
India











Pre application

Application

Offer Holder

Pre-departure



7

3

10

6





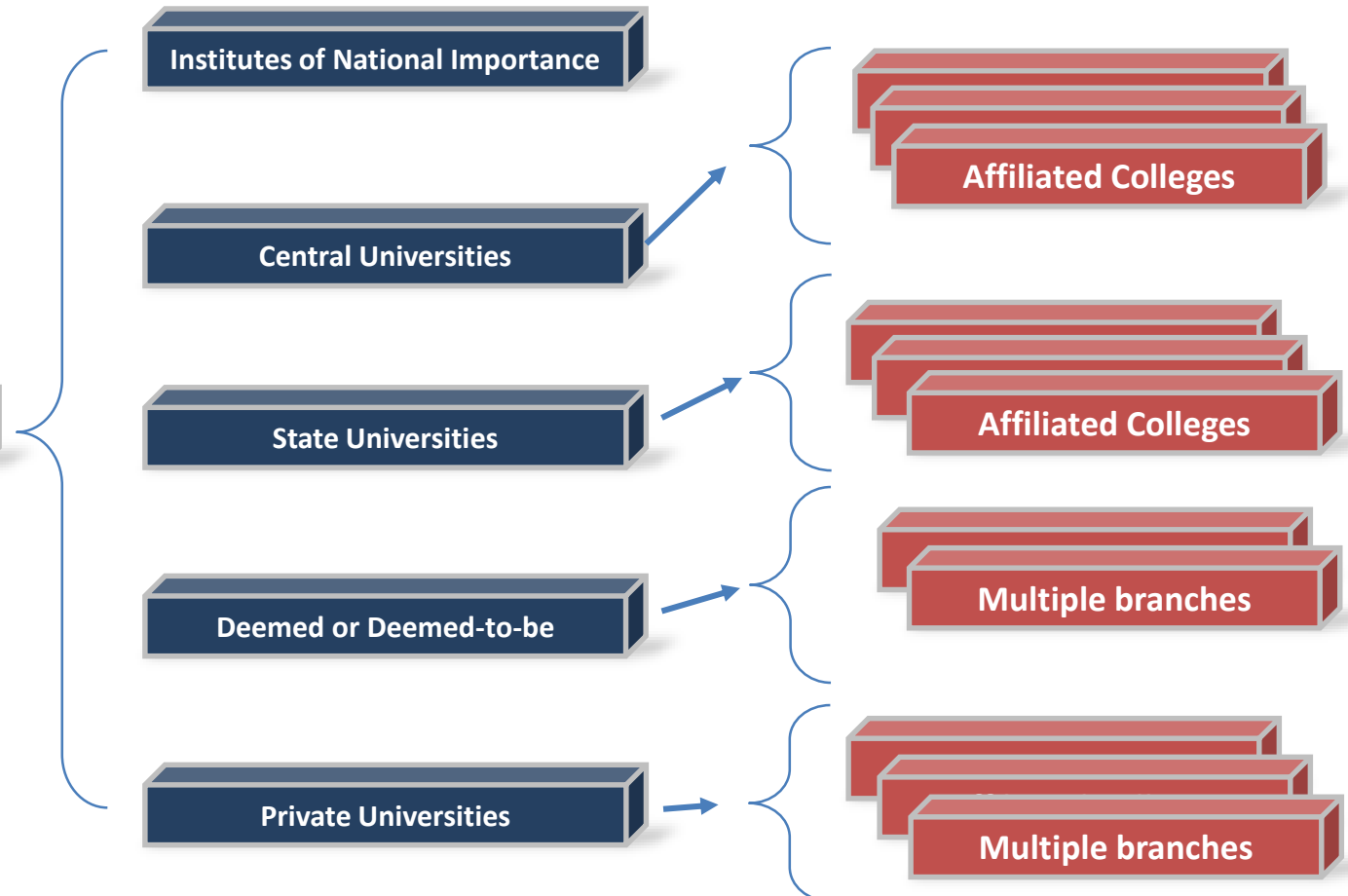
NO GRADUATION NEEDED



0:10 / 4:59



HE Institutes India Classification



British Council India

Priorities for the British Council in India



*Our positioning:
Partner of choice for building a long-term pipeline, setting up key partnerships and help develop insights*

Our portfolio next year will consist of working with over 200 Indian institutions for a year long engagement so that the Study UK brand through IES and GREAT build and sustain a positive perception in the mind of students

Thanks

Q&A