BRITISH COUNCIL

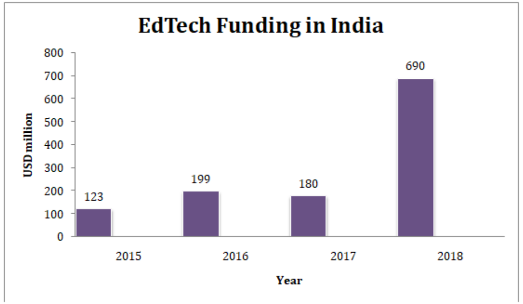
INTERNATIONAL EDUCATION SERVICES

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

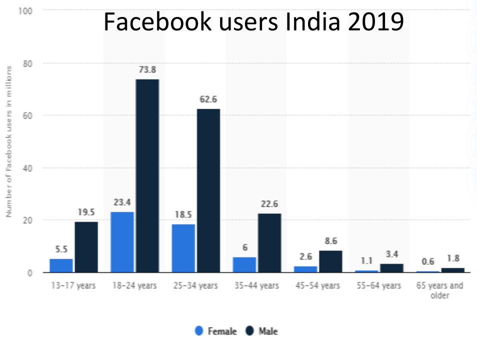
https://education-services.britishcouncil.org

India

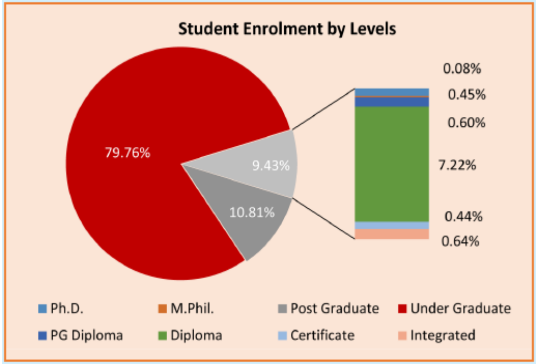
FASTEST GROWING MAJOR ECONOMY
3RD LARGEST ECONOMY BY PPP
1.3 BILLION POPULATION
100 BN US $
E-COMMERCE INDUSTRY BY 2020
3.6 TRILLION US $
CONSUMER MARKET BY 2025
29 YEARS
(MEDIAN AGE) YOUNGEST NATION BY 2025
2ND LARGEST
ROAD NETWORK 5.5 MN KMS
99%
LITERACY RATE BY 2025



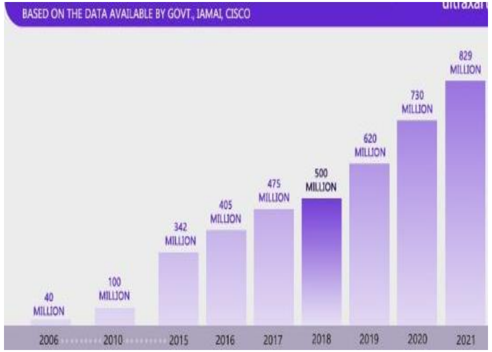
EdTech Funding in India
USD million
800
700
600
500
400
300
200
100
0
123
199
180
690
2015
2016
2017
2018
Year



Facebook users India 2019
Number of Facebook users in millions
100
80
60
40
20
0
5.5
19.5
23.4
73.8
18.5
62.6
6
22.6
2.6
8.6
1.1
3.4
0.6
1.8
13-17 years
18-24 years
25-34 years
35-44 years
45-54 years
55-64 years
65 years and older
Female
Male

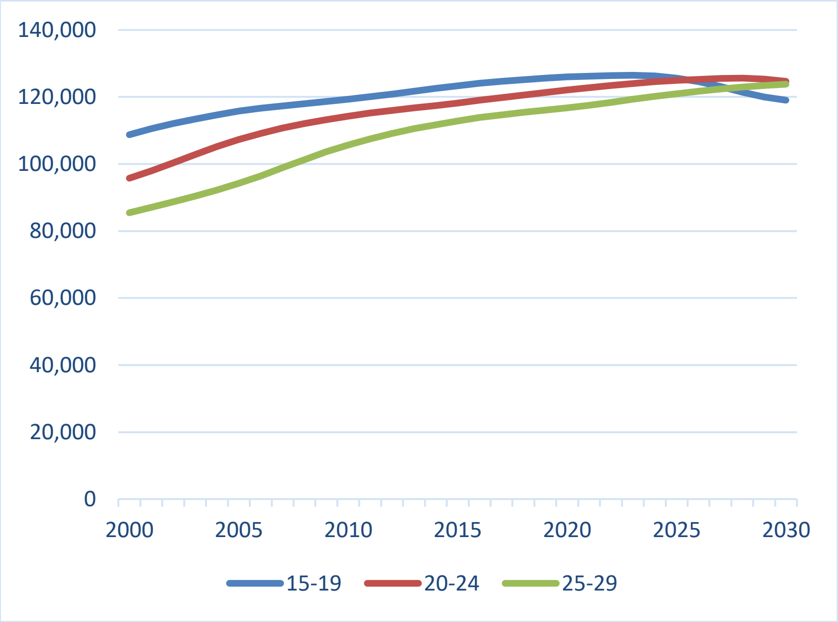


Student Enrolment by Levels
79.76%
9.43%
10.81%
0.08%
0.45%
0.60%
7.22%
0.44%
0.64%
Ph.D.
M.Phil.
Post Graduate
Under Graduate
PG Diploma
Diploma
Certificate
Integrated

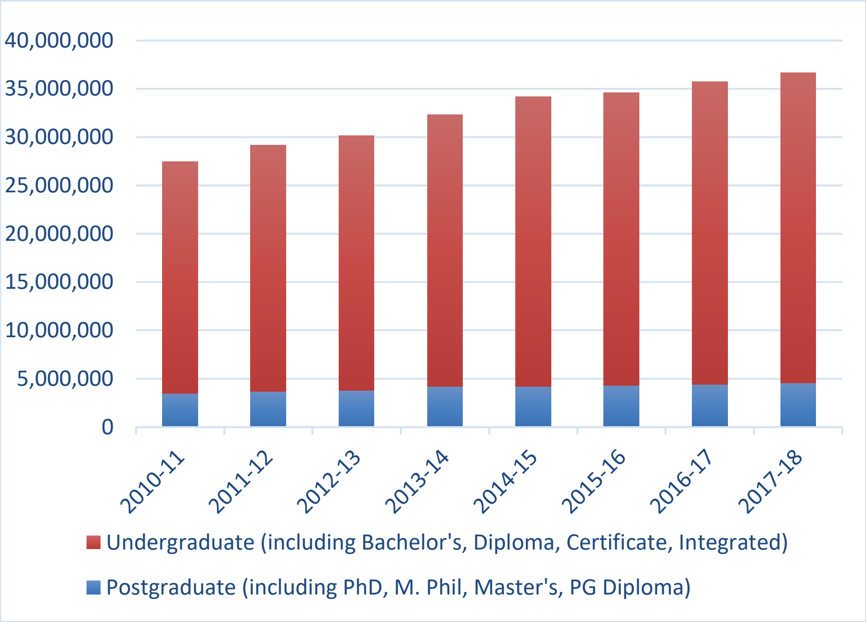


BASED ON THE DATA AVAILABLE BY GOVT., IAMAI, CISCO
40 MILLION
100 MILLION
342 MILLION
405 MILLION
475 MILLION
500 MILLION
620 MILLION
730 MILLION
829 MILLION
2006
2010
2015
2016
2017
2018
2019
2020
2021

India is set to be the largest student market



Large student age population to peak within 5 years



Postgraduate sector +34% since 2011

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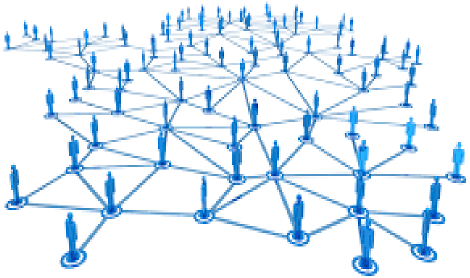
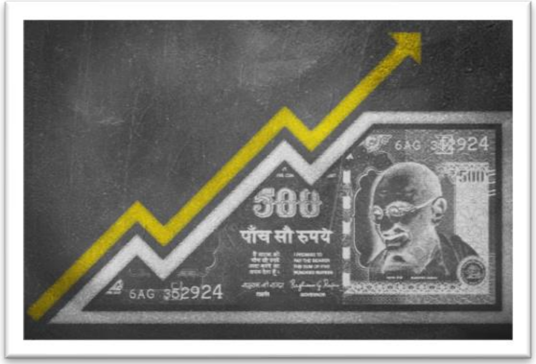
Drivers of change in India





- 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

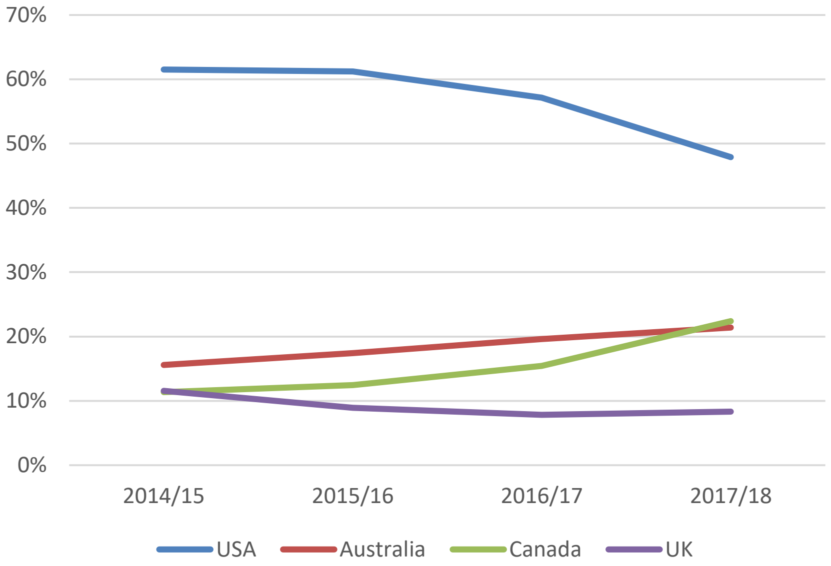
- Setting up of Global initiative of Academic Networks (GIAN) to bring in pool of scientists and researchers
- Focus on global standards in skill-based training for international markets – National Skills Qualification Framework
- Study in India – bring foreign students in India, reforming the regulatory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

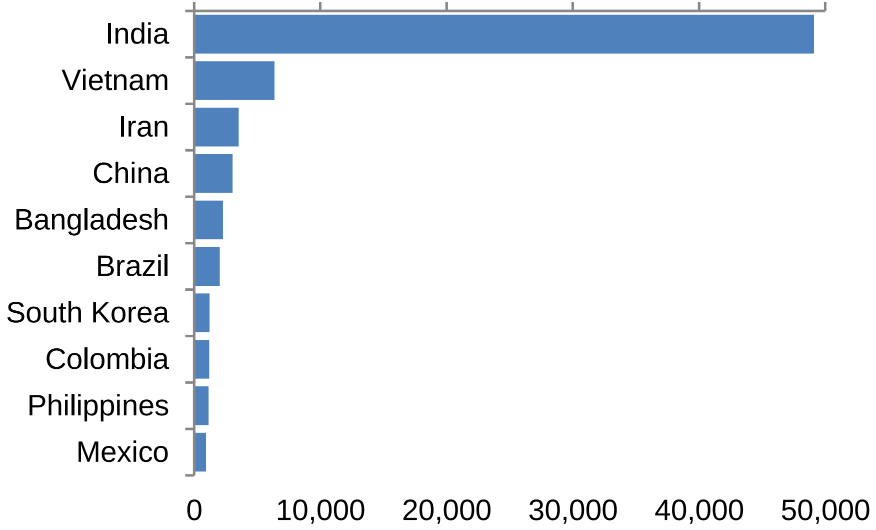
Quality of Education

- 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

Source: IIE, Austrade, Statcan and HESA

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

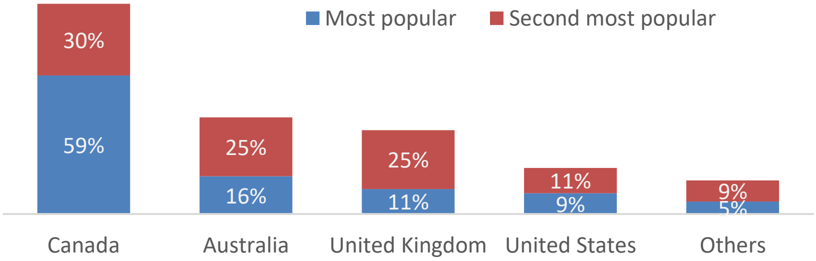
** +2 years for STEM graduates.*

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

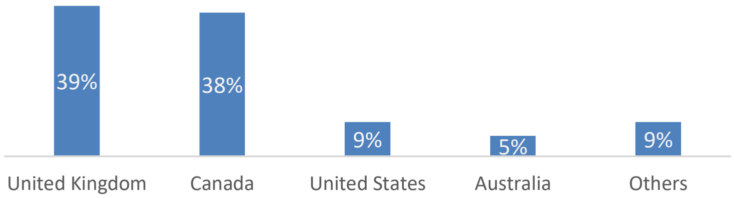
2 years PSW through GIR

What do the agents feel about the UK?

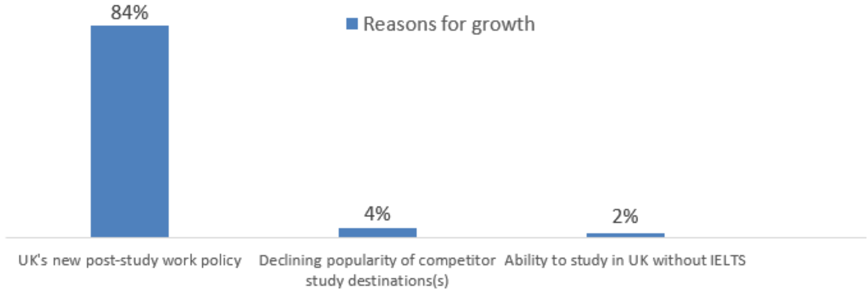
Most popular and second most popular destination?



Destinations with the strongest growth expected?



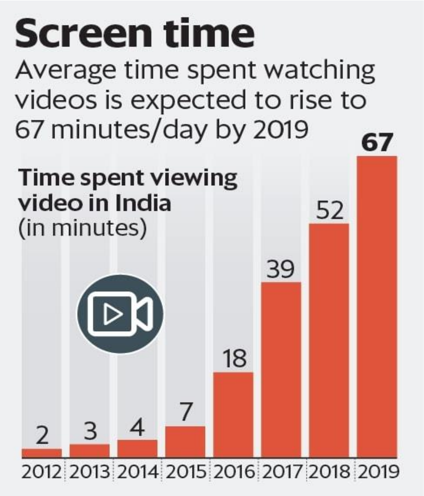
What do you think will be the primary factor driving growth in UK applications?

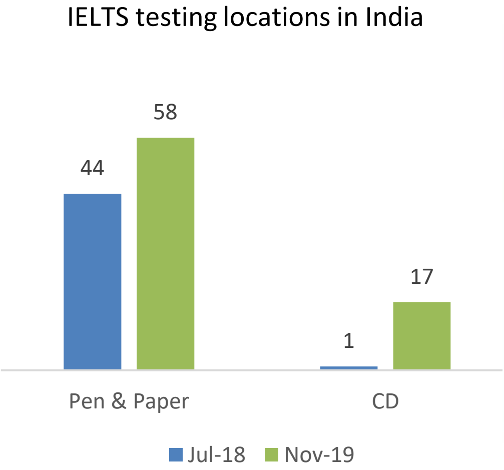


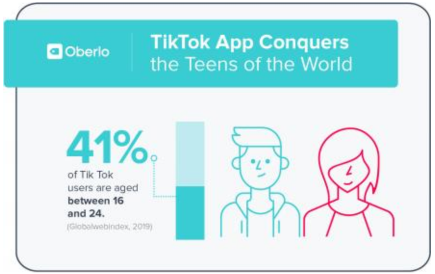
- UK specific agents are niche and smaller players compared to ones focusing on Canada and Australia
- Most Agents with the highest of registrations to other destinations are now looking to offer UK as an option
- There is limited knowledge as well as partnerships that the sector has with these players
- 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

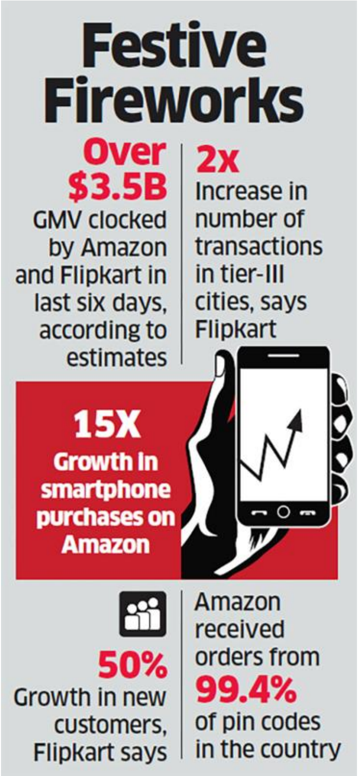






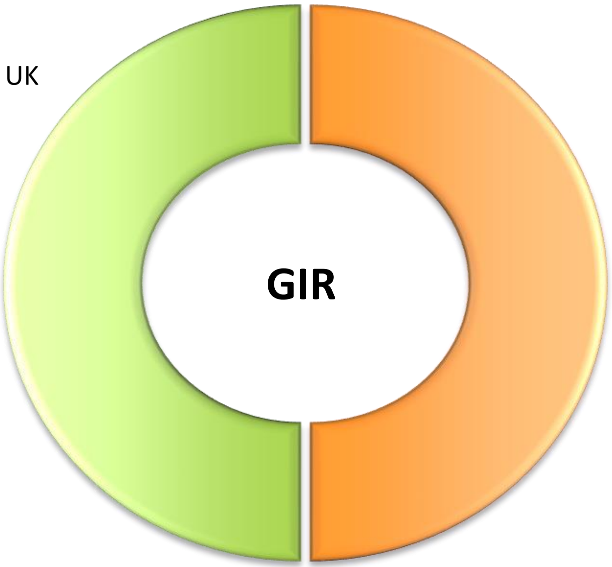
Based on learner activities on Coursera

US	India	China
7.8 mn	3.4 mn	2.3 mn



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

Plan	• Segment the country and your partners • Develop individualized plans • Target to be in the consideration of most quality students anywhere in India	*Mature, Dormant and Future cities*
Promote	• Connect to the audience on their preferred channels • Leverage your alumni to share stories • Demonstrate how life will change for them	*Real stories and case studies*
Partners	• Develop and expand your partner network • Ensure you invest in developing their skills • Develop wider collaborations in line with the NEP	*Identify and train based on markets*
Presence	• Increase your presence on ground • Invest in building a pipeline beyond the current year	*Right footprint*

Case study: Growth in Tier 2 markets in South India

Overview Context of South India

Telangana

Population: 33.83 m
GSDP: US$ 1,714

Karnataka

Population: 61.1 m
GSDP: US$ 1,900

Andhra Pradesh

Population: 50.75 m
GSDP: US$ 1,824

Tamil Nadu

Population: 72.15 m
GSDP: US$ 2,339.9

Kerala

Population: 33.41 m
GSDP: US$ 2,140

British Council and High Commission Offices

OUR PRESENCE IN SOUTH INDIA

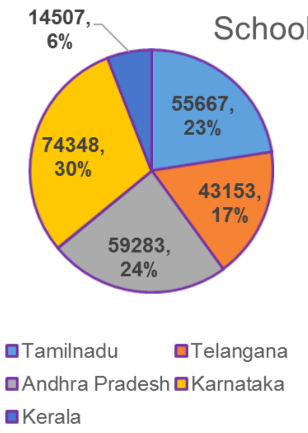
BRITISH DEPUTY HIGH COMMISSIONS

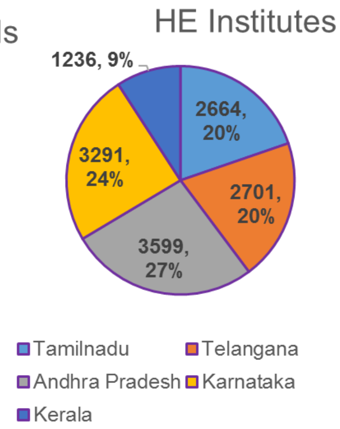
- Chennai
- Hyderabad
- Bangalore

BRITISH COUNCIL CENTRES

- Chennai
- Hyderabad
- Bangalore

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

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

2/2

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

British Council India

Priorities for the British Council in India

Brand Awareness

- Work on building the Study UK brand in dormant and new markets
- Help UK Institutions to position themselves in India

Recruitment

- Our focus would be to support in building the recruitment pipeline for the next 5 years
- Help open new markets for the UK sector

Partnerships

- Facilitate partnership forums and events
- Support the Indian institutions in setting up partnerships

Insights

- Work with over 200 institutions to develop deeper insights on students
- Work with agents and counsellors to help identify opportunities to support them

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