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Canadian Education Centre Network
Réseau des Centres d'éducation canadiens

***bringing Canadian education to the world
l'éducation canadienne sur la scène mondiale***

India – Education Market

A presentation to University of Alberta

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Indian Summer

Many of the years since independence were ones of promises undelivered. But India is beginning to live up to its dreams – perhaps encouraging neighbours to emulate its success.

- Simon Robinson,

Cover Story, on 60th Independent Year

Time August 2007



Education in India - Governance

- Central Government (Federal)
 - Ministry of Human Resource & Development
 - All India focus and reach
 - Statutory bodies under MHRD – UGC - NAAC, AICTE, NCERT, NIEPA, CBSE, AIU**
- State Government (Provincial)
 - 28 states & 7 Union territories
 - All states have their own Departments of Education



Education in India - Structure

Pre-University Education Providers:

- State Boards (Provincial)
- National Boards (Federal)
- International Boards



Format of Pre-University Programmes

The 2+**10**+**2**+3 Pattern

Kindergarten: Two Years

School: 10 Years, public examination at the
end of Std.10

Pre-University: **2 Years, with a public
examination at the end**



STATE (Province) BOARDS

Each of India's 28 states has a state-board of Pre-University Education, which provides a pre-university programme within the state.

Typically pre-university programmes include:

- English and a Second Language (local)
- Subjects divided into streams: Science, Arts, Commerce, etc



National Boards-1

Central Board of Secondary Education (CBSE)

- A central (federal) government board
- Several thousand schools all over the country and abroad
- Most Widely recognized board for India.
- Typically requires English, a Second Language and **FOUR** subjects.



National Boards-2

National Institute of Open Schooling (NIOS), formerly the National Open School.

- Run by the Central Government
- Provides for flexibility in choice of subjects and allows for examination to be taken in parts.
- Growing recognition among Indian universities



National Boards-3

Council for the Indian School Certificate Examinations (CISCE)

- Set up to replace the Senior Cambridge
- Independent non-governmental board
- Has over a thousand affiliated schools
- Requires English and Environmental Education as compulsory subjects and up to five electives.
- Widely recognised nationally and internationally.



International Boards

India now has schools that offer international pre-university qualifications such as:

- UK - A/AS Levels and the AICE Diploma of Cambridge International Examinations (CIE)
- IB of the IBO
- USA - American High School Diploma of various regional accrediting bodies
- Canadian qualifications – Ontario diploma



Universities

India has several hundred universities, some single campus, most with several affiliated and/or autonomous colleges.

- The nodal accrediting body is the **University Grants Commission (UGC)**
- All accredited universities are members of the **Association of Indian Universities (AIU)**
- Engineering Colleges need to be accredited by the **All India Council of Technical Education (AICTE)**
- Medical Colleges require the accreditation of the **Medical Council of India**
- **Deemed Universities** – Institutions of excellence which have been granted degree granting authority eg: IIT, IIM etc



Undergraduate Programmes

- Bachelor's degree programmes
 - (BA, BSc, BCom, BBA, BHM) are of **three** years duration.
- Professional programmes run as follows:
 1. Engineering, Pharmacy, Agriculture: **Four** Years
 2. Medicine: **Five** Years
 3. Law: **Five** Years
 4. Design: **Five** Years



Schools





Comments

- Maximum number of schools in India are government run
- However the public schools (private ownership) have become synonymous with quality education.
- Most countries target Public schools or International Schools for International Student Recruitment.
- Most public schools have CBSE or ICSE affiliations



Education in India – Today

Continuity & Change

- Continuity
 - The system has seen very few changes over the last decades.
 - Quality of basic education very good – in terms of information
- Change
 - Privatisation
 - Internationalisation
 - Vocational Education
 - Social & Educational reforms



Market overview - Environment

- India Shining – the mantra today
 - Interest in India is high
 - Economy doing well with promise of jobs here in India
 - It and Technology, BPO industry, manufacturing, Tourism
 - Most MNC's now have offices here in India with 100 – 5000 staff
 - Phenomenal growth in Education Loans
 - Emerging middle class with spending power
 - Opportunities & Optimism at an all time high



Market Overview – Program Trends

- Year 2008, approximately 100,000 + Indian students went abroad to study. As per a study conducted by IDP Australia this number is expected to grow till 2010.
- Top three subjects of interest are
 - Engineering,
 - Business & Management,
 - Computer Science, Math, IT
- Other subjects can be very varied ranging from agriculture to psychology, from music to political sciences. Health sciences, pharmacy, animation & design.
- Interest higher for Graduate level



Undergraduate Student profile

- 80 – 95% in Grade XII
 - Looking for the best professional programs or research institutions
 - Would expect scholarships
- 60 – 70 %
 - Very less chance of gaining college admissions in program of choice
 - Prefer international degree.
- 40 +
 - The system too competitive and does not offer many options for these students.
 - Prefer to look for University transfer or professional or technical programs abroad



Factors affecting program choice

- PROGRAM & COST
- **RESEARCH CAPABILITIES**
- COUNTRY
- GEOGRAPHICAL LOCATION
- TYPE OF INSTITUTION
- SCHOLARSHIPS/FINANCIAL AID OPPORTUNITIES
- QUICK RESPONSE TURN AROUND TIME
- PLACEMENT STATISTICS

R & D Expenditure

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Country	No. among Top 1% of Cited Papers	Per Capita R&D Expenditure (US\$)	R&D Expenditure per top cited Paper US\$ million		Expenditure Per scientist (US\$ 000)	Scientist Per mill Population
USA	23723	705	8.4	2.85	230	4099
England	4831	450	5.6		172	2666
Japan	2609	978	6.1	0.65	192	5095
Canada	2165	476	6.8	3.55	160	
China	375	12	4.0		16	
Australia	1049	285	5.2		85	3353
India	205	5.5	2.7	0.45	35	157
South Korea	294	241	3.9	0.73	104	2319
Israel	568	720	7.6		410	
Brazil	188	56	5.1		36	



Market overview - Competition

- o Established players
 - o USA – The giant
 - o Australia, UK, Russia, Germany, Canada, Netherlands, France, Ireland, New Zealand.
- o New entrants (less than 5 years)
 - o Singapore, Malaysia, China, Brazil, Dubai.
 - o Off shore campus in India and Asia
 - o India



USA – The giant awakes

- 34,000 fresh students in 2008
- 90,000+ Total enrollments
- Total no of Fairs – 9 in 7 cities.
 - Total no of participating institutions – 119
- Are increasing the number of visa centers across the country.
- Landmark Move – Will accept Indian 3 year Bachelor degree for Graduate Studies
 - Top Universities visiting the country to woo the best minds





UK – Growing Fast

- 24,000 Fresh students went in 2008
- Total no of Fairs – 2 in 10 cities.
 - Total no of participating institutions – 70
- Prime Ministers Initiative for International Education – 5 year initiative
 - 7 million pounds dedicated for 2006 – 07
 - Target year 2011 – Additional 70K students in Higher Education and 30K in Further Education
 - UKIERI – Research program





Australia – The Kangaroo Leaps

- 34,000 Fresh students went in 2008
- 60,000+ Total enrollments
- Total no of Fairs – 3 in 7 cities.
 - Total no of participating institutions – 40
- Currently 7,800 enrolments in the VET sector.
 - Attributed to the shift in the skill requirements for PR. This led to an increase in the % of Indian students going to pursue studies in Australia at an under grad level.
- \$1.4 billion scholarship program for Asia Pacific region
- Target 2025 – 80,000 Indian students



Competitor Country Activities

- Regular marketing presence in the country in form of advertising – print, online or radio.
- Regular events – the big players have minimum 2 fairs in a year.
- Regular presence of academia in the country on Guest lectures/ As subject experts. Reinforces the image of the country as a research destination.
- Availability of scholarships and work study options.



International Education – 1985

- International Student Recruitment
- Classrooms with few students from different countries (either brightest or the richest)
- Faculty exchanges with a 1 or 2 top institutions
- Development & Aid related projects in the 3rd world countries
- High motivation for students for better academic opportunities and quality of life.
 - Very few thought of returning
- High returns balanced out the negatives – alien culture, no family



International Education Today

- Diversity on Campus
- Good Business
- Encourages tolerance and understanding
- Impacts Policy and Trade
- Impacts future politics
- Academic Opportunities and Quality of life – the gap reducing.
- The returns increasingly does not justify uprooting yourself
 - Translates into students coming back after 5-10 yrs.
 - Dual citizenships



What will work in this environment?

- A consolidated strategy driven by a common vision
- Know your strengths and highlight them
 - Brand of institution, people, cities & country
- Market positioning
- Continuous Commitment from the Top
 - Connections, Action at the Bottom.(People to People Contacts) provide the glue for the bond.
- Alumni as a potent Catalyst.
- Time, Energy, Resources and **Goodwill** for Success.



Opportunities for University of Alberta

- Placed in top 5 destinations of interest.
- Large pool of available students in India.
- Recent CIC rules for off campus work , Canadian Experience Class and 3 year work limits has increased interest
- Strong provincial economy
- Scores over competition for various reasons
- Access to South Asia & Africa at no extra effort



and Challenges

- Awareness
 - Give importance to marketing Canada as a desirable destination.
 - Build institutional awareness & brand
- Consistency
 - The recruitment strategy should be consistent at all levels.
- Coordination
 - Have a long term strategy for India. This is a vast & diverse market.



And Challenges...

- Pro activeness
 - TOEFL/IELTS requirements
 - Letter of Acceptances as early as possible.
 - Conditional LOA
 - Scholarship letters
- Systemic barriers
 - 16th year of education for Masters level study
 - Math requirement for Business & Computer Science
- Perception barriers
 - Rest of India perceives Canada as a destination for Punjab only.
 - Canada a tough destination for visa's



Recommendations

- Plan should include
 - publicity, success stories of students.
 - Online profile
 - advertising
 - events,
 - Linkages & Exchanges
 - Scholarships
- Be consistent – this market pays in the long run.
- Develop your own individual plan & USP
 - what works for 1 institution may not be the best strategy for another.
- Do not underestimate Fairs.
 - The best branding vehicle for your institution.

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Questions, Answers & Issues

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Thank You

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