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Abbreviations used in the document

Abbreviation	Full-form
AICTE	All India Council for Technical Education
ASSOCHAM	The Associated Chambers of Commerce and Industry in India
CUAP	Committee on University Academic Programme
DGET	Directorate General of Employment and Training
EEP	Educational Exchange Programme
ETC	Extension Training Centres
FICCI	Federation of Indian Chambers of Commerce and Industry
FTE	Full Time Equivalent
IETS	IL&FS Education & Technology Services Ltd.
ITI	Industrial Training Institute
ITO	Industry Training Organisation
ITP	Industries of Technology and Polytechnics
MBIE	Ministry of Business, Innovation and Employment
MCA	Medical Council of India
MHRD	Ministry of Human Resource Development
MoA	Ministry of Agriculture
MoE	Ministry of Education
MoLE	Ministry of Labour and Employment
MoRD	Ministry of Rural Development
MoRTH	Ministry of Road Transportation and Highways
MoUD	Ministry of Urban Development
MSME	Micro Small and Medium Enterprises
NCEA	National Certificates of Educational Achievement
NRLM	National Rural Livelihood Mission
NSDC	National Skills Development Corporation
NSQF	National Skills Qualifications Framework
NZQA	New Zealand Qualification Authority
NZQF	New Zealand Qualification Framework
NPPP	Private Public Partnership
OCED	Organisation for Economic Cooperation and Development
SDI	Skills Development Initiative
SIRD	State Institutes of Rural Development
SJSY	Swarna Jayanthi Gram Swarozgar Yojna
SSC	Sector Skills Council
STA	State and Territory Training Authorities
TAFE	Training and Further Education
TEC	Tertiary Education Commission
TEO	Tertiary Education Organisation
TVET	Technical Vocational Education and Training
UGC	University Grants Commission

1 Overview of Indian Vocational Education

1.1. Structure of Vocational Education System

The Indian national policy on skill development aims to train 500 million people in vocational skills by 2022 through various ministries and national bodies. In 2007, Prof. CK Prahlad, in his academic theory and vision for India at 2022 (75 years since Indian independence in 1947), predicted that India will need 500 million skilled people to sustain its economic growth. The Government of India has embarked on a series of measures to augment skill development infrastructure in both public and private domains.

In 2013, the Government of India constituted the National Skill Development Agency (NSDA) for coordinating and harmonizing the skill development efforts of the Centre and the private sector to achieve the skill targets of the XII Five Year Plan and beyond. The NSDA, set up by subsuming the Prime Minister's National Council on Skill Development (PMNCSD), the National Skill Development Coordination Board (NSDCB) and the Office of the Adviser to the Prime Minister on Skill Development would function as an autonomous body and strive to ensure that disadvantaged groups are able to bridge the gaps in their skill requirements.

The NSDA will develop and monitor an overarching framework for skill development. It will also anchor a national skills qualifications framework and facilitate the setting up of professional certifying bodies in addition to existing ones. Considering the low level of private participation in skill development, the Government of India has set up the National Skill Development Corporation (NSDC), a Public Private Partnership (PPP) initiative to foster private sector initiatives in skills development of 500 million people by 2022. In 2008-09, the Government of India formulated a plan under "National Skills Mission" which mandated skill training targets to be achieved by various ministries and national level agencies till 2022. Fig. 1 illustrates national level agencies which come under the purview of National Skill Development Authority, their key initiatives and their respective targets for 2022[1].

[1] *National Skill Development Policy, Government of India*

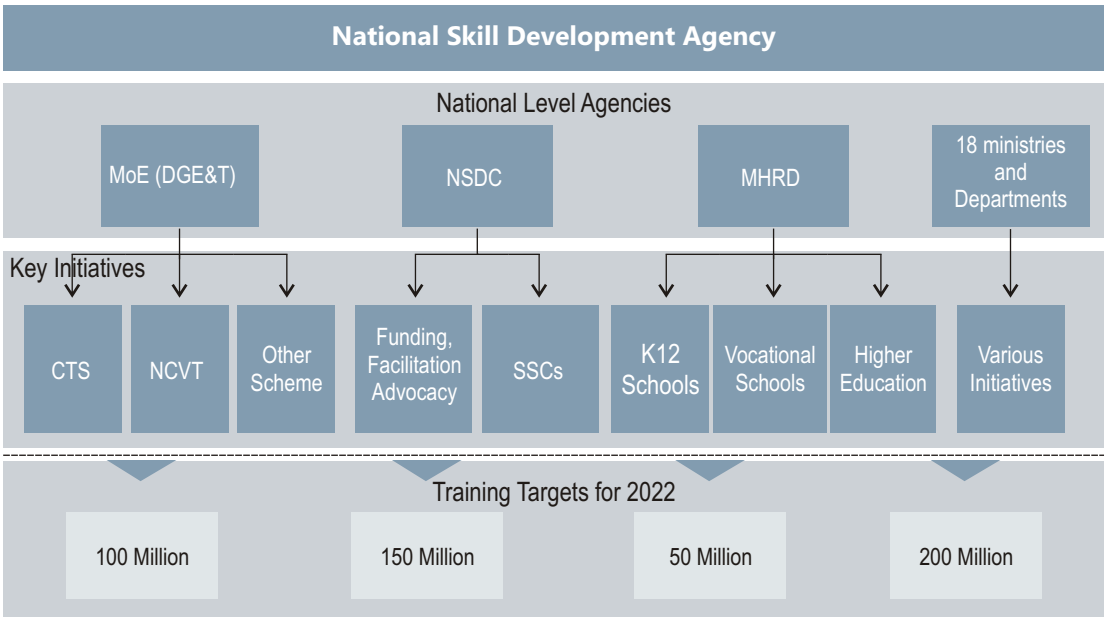


Fig 1: NSDA and National Level Agencies with targets for skill training, under its purview

Existing national level agencies and ministries have undertaken multiple initiatives to meet their targets. The Ministry of Labour Employment has set up 2500 government ITIs and 7000 private ITIs to fulfil their training targets. The vocational training infrastructure under the Ministry of Human Resource and Development (MHRD) consists of public/privately owned Polytechnics and vocational schools.

Other key ministries with significant training targets have limited internal training capacity and focus on fund based training to meet skill development targets for 2022.

1.2. Schemes for Skill Development under various Ministries of GoI and NSDC

Considering the individual training targets of the 18 Central Government ministries and NSDC, eight ministries (MoLE, MHRD, MoRTH, HUPA, MoRD, MoUD, MoA and MSME) along with the NSDC emerge as the key drivers for training as they account for 80% of the total target of training 500 million people by 2022. Even though these Departments account for 80% of the total training targets, due to a shortfall in their internal training capacities, they are expected to award over 70% of all the government projects to private training providers[2].

[2] *NSDC, Ministries under Government of India with mandate in skill training*

Fig 2: Training Targets of NSDC and Ministries by 2022 (in millions)

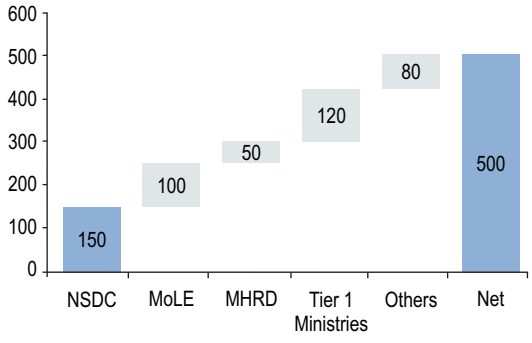
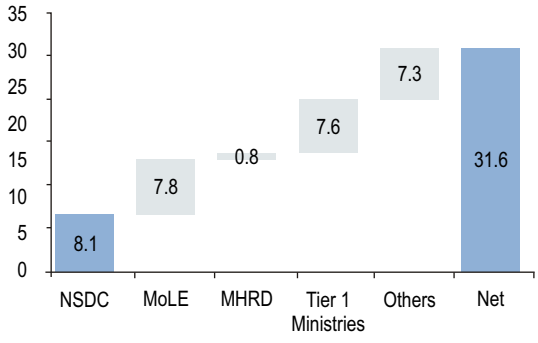


Fig 3: Estimated Gap in Training Capacity per Annum (in millions)



*Note: The gap in training capacity is estimated based on per annum demand and existing supply. The capacity gap is estimated as of 2012. NSDC estimates are based on commitments of investee companies.

1.3. Ministry of Labour and Employment, Government of India

The Ministry of Labour Employment has the largest training target of 100mn people by 2022 which it plans to achieve through various schemes such as Craftsman Training scheme (CTS), Apprenticeship Training Scheme (ATS), Skill Development Initiative (SDI) etc.

MoLE Schemes	Current Capacity	Training Target 2022 (in millions)	MoLE steps to meet target
CTS	1.8 million seats 2.8 Million trained	29.4	Current capacity of ITIs and ITCs to be increased at CAGR 8% 1500 new ITIs to be opened in PPP mode
ATS		5.4	Current capacity to be increased at CAGR 5%
Skill Development Initiative Schemes and MES		57.2	5000 SDCs will be set up as per 5th Plan in public private partnership mode; 1 million to be trained and tested every year
DGET Field Institutes		0.5	Current capacity to be increased at CAGR 5%

**Number of seats is a combination of unique seats across CTS, ATS and SDI; Potential capacity estimated based on average course duration and 100% fill rate*

Craftsman Training Scheme: The Craftsman Training Scheme, delivered through government and private ITIs, focuses on leveraging the PPP model in skill development. Currently, there are 2000 government ITIs in India and an additional 1500 have been proposed for the next five year plan (2012-2017). In 2007, the Government unveiled a plan to enhance the industry relevance of ITIs by upgrading 1396 ITIs under the PPP route. This was in addition to the 500 ITIs which had already been initiated for upgrading through direct Government support (100) and World Bank support (400). By 2012, 1775 of the existing 2000 ITIs had been adopted by Industry Partners under the upgrading scheme of DGE&T. For example, Tata Motors has adopted 9 ITIs.[3] The foreign player could participate in the CTS scheme by partnering with MoLE and/or state level

Departments relating to VET to offer content, curriculum and Train the Trainer services to existing and upcoming ITIs.

Skill Development Initiative: It is an initiative through which MoLE provides funding for VET providers to provide training and testing services. Some of the other initiatives of MoLE include Advanced Training Institutes, Crafts In Structure Training, Hi Tech Training Scheme, Supervisory Training and Women Training. Through the Skill Development Initiative Scheme, the MoLE enlists participation from private VET providers on training and certification. The scheme has an outlay of USD 92 million and is fully funded by the Central Government. The funds go towards both assessment and certification. There are around 6400 VTPs (government ITIs, private ITIs and private training providers) across India which provide vocational education and training to 1 million people annually in 1257 courses. Testing of skills is done by independent Assessing Bodies and certificates are provided by NCVT.

1.4. Ministry of Human Resource Development

In the Twelfth Five Year Plan (2012-17), MHRD initiatives in VET present an opportunity of approximately USD 7 million per annum[4] in the areas like content and trainer development. According to the Plan, the private sector needs to be engaged under the PPP model as "Academic Partner". The role of the Academic Partner will include 'Teacher and Assessor training' and 'Academic content and curriculum development'. Thus foreign players could strategically engage with MHRD to explore phasing of budgetary spends and identify opportunities.[5]

Initiatives	Description	Proposed budget* (USD)	Estimated opportunity for VET providers (USD)
Opening 6000[6] new schools	Introduction of 2 vocational courses per school with 50 students in each course	1332 mn	Training: 10 to 15 mn
Strengthening 3000 existing schools	Ensure running of 2 vocational courses per school with 50 students in each course	429 mn	Training: 1 to 2 mn
PPP assistance to 2500[7] Schools	Reimbursements for 25% of VET students to facilitate opportunities for Economically Weak children	297 mn	Training: 7 to 10 mn
Assistance to 800 NGOs	To assist NGOs in undertaking 2 VET courses and train 200 trainees in each course	113 mn	Content Training: 0.6 to 0.9 mn
Training to 90,000 teachers	In-Service and Induction training to batches of 30 teachers	35mn	Content Training: 1.6 mn to 1.8 mn
Development of 1200 modules	In-Service and Induction training to batches of 30 teachers	8mn	Content: 6 Mn

[3] *Ministry of Labour and Employment, Government of India*
[4] *MHRD, KPMG Analysis*
[5] *MHRD, KPMG Analysis*
[6] *http://mhrd.gov.in/model_school*
[7] *http://www.thehindu.com/features/education/school/model-schools-under-ppp-mode-to-roll-out-from-201516-raju/article4935396.ece*

In the National Skill Development Policy of 2009, there was a proposal to establish a National Qualifications Framework. The National Skills Qualifications Framework (NSQF) is currently under development within the India-EU Skills Development Project and it will be anchored by NSDA[8]. Pilot vocational training initiatives are already underway with private and foreign institutional collaborations. For example, a pilot project has been launched with the coverage of 40 schools in the state of Haryana and 4 SSCs (Automotive, Security, IT and retail). The SSCs have developed occupational standards, curriculum and assessment packages and training modules across these sectors. CBSE schools are soon going to feature vocational courses.

1.5. Other Ministries

Name of implementing ministry	Scheme	Overview	Estimated opportunity per annum
Ministry of Rural Development (MoRD)	NRLM	• Focuses on the development and empowerment of Self Help Groups (SHGs) and Below Poverty Line youth • In the 12th five year plan (FY13 to FY17), outlay of about USD 1.3 Bn to develop skills of 5 mn rural youth	• Curriculum development and training opportunity of USD 24-39 mn per annum for the next 5 years • Price point per student is around USD 315-405
	SIRD and ETC	• Scheme for establishment and strengthening of State Institutes of Rural Development (SIRD) and Extension Training Centres (ETC) for training of rural development functionaries	• USD 8mn was released to SIRDs and USD 5 mn for ETCs in FY11 towards training
Ministry of Housing and Poverty Alleviation (HUPA)	SJSRY	• Annual target of assisting 125,000 urban poor in setting up micro enterprises for self - employment • Training of beneficiaries for upgrading and acquisition of vocational and entrepreneurial skills[1]	• Curriculum development, training and assessment opportunity of USD 52 mn to USD 78 mn
Ministry of Road Transportation and Highways (MoRTH)	Transport Training Institutes	• Objective to set up state level training institutes (Model Driver Training Institutes)-one per state. State Governments would have to set up region level RDTIs	• Central Govt. would provide 100% of the Capex required complemented by grants by State/ Centre till the operations become self-sustaining

[8] *http://uil.unesco.org/fileadmin/keydocuments/LifelongLearning/en/GlobalInventoryonNQFs_India_130509_ final-final.pdf*
[9] *http://mhupa.gov.in/programmes/upa/nsdp/sjsry/sjsryintro.htm*

1.6. National Skills Development Corporation

The Finance Minister, Government of India announced the formation of the National Skill Development Corporation (NSDC) in his Budget Speech in March, 2008 and NSDC was formally launched in October 2009. NSDC envisions vocational education emerging as a strong alternative to formal education by 2022 and has made steady progress since inception. By August 2013, a total of 19 SSCs[10] have been approved compared to six in FY11. Similarly, the number of projects approved increased from 30 in FY11 to 82 in Mar 2013[11]. The number of training centres almost trebled, increasing from 805 to 2,598 from FY11 to March 2013. NSDC has trained 458734 people by March 2013[12] . The focus area of NSDC for 2014-15 includes the following

- Post-placement outcomes and feedback from industry on quality of training
- Setting up sector standards for skills development and training
- Developing vocational education as a strong alternative to formal education

Sector Skills Council

The NSDC has also approved the formation of 19 SSCs which are in various stages of setup and operations -thus providing an opportunity for private players to participate in their roll out. The stages after approval of a SSC include incorporating the SSC, developing a business case, developing labour market information, developing National Occupational Standards and developing other operating procedures. For the SSCs which are already incorporated and have appointed CEOs, private players can help in the stage of developing NOS.

Nine of the 19 SSCs have started creating Occupational Standards. Security, Rubber, IT-ITES, Healthcare and Telecom SSCs have already submitted qualification packs covering 80% of the workforce. Automotive, Gems & Jewellery, Retail and Media SSCs will submit their NOS' by August 2013[13]. This leaves the new entrants with opportunities in the areas of Food Processing, Electronics, Construction, Plumbing and Leather sector skills council[14]. SSCs provide opportunities in the areas of NOS and curriculum development. The majority of these opportunities are untapped as the SSCs are yet to start operations. However, foreign players will need to collaborate with local partners since the scope of activities includes significant market research and stakeholder engagement.

[10] *National Skill Development Corporation*
[11] *http://nsdcindia.org/pdf/annual-update-2012-13.pdf*
[12] *National Skill Development Corporation Newsletter, March 2013*
[13] *http://www.nsdcindia.org/pdf/ssc-newsletter-may13.pdf; KPMG Analysis*
[14] *http://www.nsdcindia.org/pdf/ssc-newsletter-may13.pdf; KPMG Analysis*

2 Competitive Landscape in the Indian Vocational Education

The Indian Vocational Education competitive landscape has witnessed significant changes over the last decade with a steady influx of new entrants primarily driven by the changing policy environment in the country. The threat of New Entrants is medium considering the vast opportunities available for skill development in India. Although there are no regulatory barriers for private players to enter the skills training space, challenges relating to scalability and availability of quality teaching faculty do exist in the system.

Employers, who are one of the largest consumer segments for VET in India, have high bargaining power due to dependencies created around them. These include employer influence in customised training which is developed as per employer's needs and the placement of students. The delivery of training is constrained by the employer locations. For example, construction training is typically delivered at the site. The lack of standards in assessment and certification is creating challenges in ensuring uniform learning outcomes.

The Increased availability of alternate delivery forms of VET is further intensifying the competition. Vocational training programmes offered by private providers in the form of in-house industrial training academies, on-the-job industrial training pose significant challenges to new entrants. Non-profit organisations such as Pratham, PanIIT Gurukul etc, which offer affordable skill training programmes to underserved communities along with government and private run government ITIs pose challenges for private organisations to penetrate into these segments.

Supplier bargaining power is low due to weak regulations and the fragmented nature of the industry. However there is now an increasing awareness, amongst target segments, of the prospects in informal/ contract job segment.

Government and nodal agencies for skill development like NSDC are playing a crucial role in garnering private participation in skill training. The emergence ofSector Skills Councils, an initiative by NSDC to promote a sector level approach, could have a significant impact in driving excellence in training in line with the success of such sectoral bodies in New Zealand, UK, and Australia. The plan to enhance the training

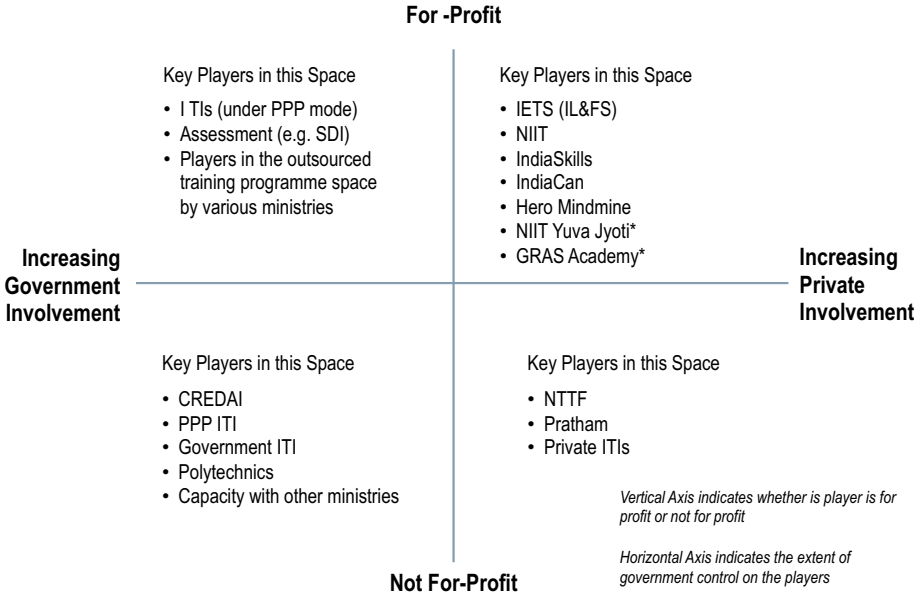
mandates of Government departments is expected to provide opportunities for private, skills training providers.

The Vocational Education market outlook is expected to be reasonably conducive for the entry of new players. This is due to the aggressive capacity expansion plans of NSDC training partners who can leverage on advantages of scale. Government initiatives to upgrade and expand existing government ITI infrastructure, in collaboration with private players, is further expected to consolidate the position of existing players. However, given the significant market demand for skill training, there is definitely a market for new entrants who are able to secure funding for operations and expansion. Further, the Indian Government's initiatives to promote skill development through the PPP model is expected to strengthen the opportunities for private and for profit training providers, making it attractive for new entrants.

Buyer bargaining is expected to reach medium levels considering the development and adoption of industry recognised curriculum and standards driven by SSCs. The NSQF is expected to create a seamless integration between vocational education and formal education through regulatory frameworks and proposed policies to define national standards in training and assessment, This leads to the choices for vocational education and formal education progress from an 'either-or' to an 'and' relationship.

Competition in the Indian vocational education system can be classified into four clusters based on their profit motives and the extent of government control on their functioning

Fig 4: Competitive Landscape in Indian Vocational Education System



For profit operations within the control of government is a classic case of private players undertaking training on behalf of government ministries. The emerging Public Private Partnership space typically comes under this category, which is regulated by Government yet a defined profit potential. Several players have successfully developed high volume and low cost training models in this category. Under the Private, For Profit Cluster, training providers have their own approaches to build scalable models in a commercial scenario. Some of the key players include IETS (IL&FS), NIIT, Assess, IndiaSkills, IndiaCan, Hero Mindmine, NIIT Yuva Jyoti, TeamLease, Gras Academy.

In the Government, Not for Profit Cluster, players are trying to enhance efficiencies and unlock the value in the infrastructure and capabilities with the ministries of the government. They also provide synergistic opportunities with existing players such as government ITIs, Polytechnics. Players in the Private, Not for Profit Cluster might require partnerships with other VET providers for specific value chain opportunities. Most players have limited margin or work on cost-to-cost basis either for larger social good (Eg: Pratham) or for captive consumption (eg: L&T CSTI).

Competition is not only restricted to domestic players as global players are increasingly investing in the Indian VET system. Foreign collaborations in India have adopted varying operating models spread across business segments (Government, Corporate and Institutions) and the value chain. While the majority of the collaborations with Government/ Corporate/ Institutes engage foreign partners for curriculum development and content provision, industry has witnessed significant direct investments from foreign institutions through joint ventures.

A summary of collaboration models adopted is provided below

- Foreign VET collaboration with Indian corporates
  - Unitec Institute of Technology (New Zealand) and CMC (a Tata enterprise) academic collaboration to deliver the Postgraduate Program in Data Analytics & Cyber Security (PGDCS)
  - Holmesglen TAFE's engagement with the GMR group in India for training in construction sector,
  - Festo Didactic of Germany has collaborated with Shalimar Group for training in Pneumatics and Mechanics
- Foreign VET collaboration with Government of India through PPP schemes, funding and infrastructure support

- The Government of Karnataka collaboration with German Technical Corporation to establish Model Multi-Skill development centres.
- The Federal Republic of Germany has collaborated with the Indian Government department (MSME), to provide assistance in setting up Indo-German tool rooms across 18 locations in different parts of the country.

- Strategic partnerships with Indian training institutions through revenue sharing agreements, joint venture agreements and provision of bridge courses
  - IL&FS (STEPS programme) partnership with Chamber of Skilled Crafts Rhein-Main of Germany
  - IndiaSkills (Manipal, India-City&Guilds)
  - New College Nottingham, UK, through an International Lifestyles Academy in India offers programmes that are vocational qualifications recognised in UK.

Thus, successful country partnerships have undertaken the following activities to establish their base in India

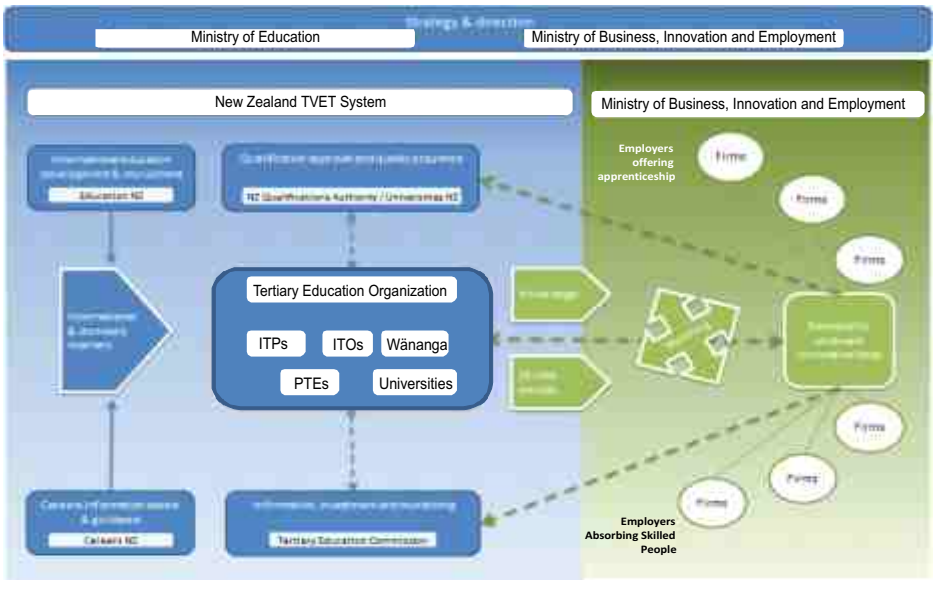
- *Establishing strong apex bodies in India to interact with the Government in India and its various ministries*
- *Adopting a multi-focused engagement model, simultaneously interacting with all levels of the Indian Vocational Education System viz., Government, Ministries related to respective industries and to skill development, Sector Skill Councils, State Governments etc*
- *Establishing strong sectoral representation with their Indian counterparts, the Sector Skill Councils*
- *Identifying and collaborating with progressive training partners in India*
- *Identifying and collaborating with industry and industry organisations to support their skill development*
- *Identifying areas of collaboration in complementary skill sets where the home country has established capabilities and credentials*

3 Overview of New Zealand TVET System

Tertiary education in New Zealand consists of all post-secondary education including higher and vocational education. There are various categories of service providers in the tertiary education segment including Universities, Institutes of Technology and Polytechnics (ITPs), Private Training Establishments (PTEs), Industry Training Organisations (ITOs) and Wananga (New Zealand's indigenous tertiary institutions). New Zealand has a comprehensive TVET system comprising of arrangements for policy, funding, qualification design and quality assurance. TVET policy direction is provided by New Zealand's Ministry of Education (MoE), and policy advice is also rendered by the Ministry of Business, Innovation and Employment (MBIE)[15] .

Funding for all the aforementioned tertiary education organisations is provided by the Tertiary Education Commission (TEC)which is also responsible for monitoring the performance of the TEOs. The New Zealand Qualification Authority (NZQA) is the crown entity entrusted with the statutory task of Quality Assurance. Quality assurance for university education falls under the purview of Committee on University Academic Programmes (CUAP).

Fig 5: New Zealand Vocational Education Structure[16]



[15] *Presentation by Tim Fowler, Chief Executive, Tertiary Education Commission made to India Skills Delegation, April 2013- Overview of New Zealand Tertiary Education System.*

[16] *Presentation by Tim Fowler, Chief Executive, Tertiary Education Commission made to India Skills Delegation, April 2013- Overview of New Zealand Tertiary Education System.*

The Ministry of Education is the lead advisor on the New Zealand education system providing policy advice and strategy related to tertiary education. The Ministry of Education shapes the direction for sector agencies, including monitoring of Tertiary Education Commission, NZQA and Careers NZ (which provides careers information advice and guidance). MBIE works closely with MoE to provide advice on skills and the labour market. MoE in 2009 released the Tertiary Education strategy which is the main strategy document for 2010-2015. The next strategy document is to be produced jointly by MoE and MBIE. TEC and NZQA are the operational agencies working directly with the Tertiary Education sector to operationalise the strategy set by MOE. They regularly feed operational advice back into the policy process, making the system dynamic and adaptable to the changing needs of industry.

TEC[17] is responsible for funding the government part of the contribution to tertiary education and training. Tertiary Education Strategy is the main document that lays down the guidelines for funding which is offered through a plan-based investment approach. MoE also issues funding determinations which are a set of rules about how each government fund can be used. These plans are funding agreements written and owned by TEOs and submitted to TEC for funding approval. TEC is also involved in the monitoring of performance of TEOs against the plans provided. Since 2012, the Government has incorporated performance based funding and that 5% of a provider's main funding would be automatically linked to their performance across four Educational Performance Indicators (EPIs). If providers do not meet set sub-sector specific performance standards, they tend to lose intended funding. This system helps education and training providers to enhance their quality and performance, thereby assuring quality service delivery.

The New Zealand Qualifications Authority[18], established by the 1989 Education Act centrally controls the quality assurance system which includes the quality framework (NZQF) and standards. The system encompasses all quality assurance elements in the education system within one agency and this ensures a centralised monitoring of the quality levels while reducing the risk of compromising quality through different agencies' interpretation of policies. NZQA administers the National Certificates of Educational Achievement (NCEA) and is also responsible for the quality assurance of non-university, tertiary training providers. Qualifications delivered by New Zealand TEOs are developed in partnership with industry. Once approved by NZQA,

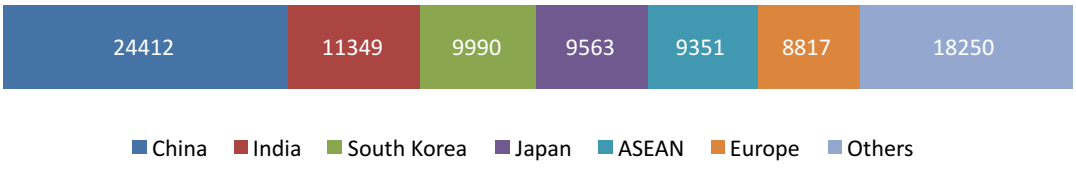
[17] *Presentation by Tim Fowler, Chief Executive, Tertiary Education Commission made to India Skills Delegation, April 2013- Overview of New Zealand Tertiary Education System*

[18] *Presentation by Tim Fowler, Chief Executive, Tertiary Education Commission made to India Skills Delegation, April 2013- Overview of New Zealand Tertiary Education System*

qualifications are listed on the New Zealand Qualifications Framework. Internal and national moderation ensures ongoing consistency of programme delivery.

The *Committee on University Academic Programmes*[19] provides quality assurance for all university education. It considers matters across the university system including the exercise of programme approval and moderation procedures, advice and comment on academic developments, and encouraging the universities to develop courses of study that will facilitate the transfer of students between programmes and institutions.

Composition of International Students by Origin in New Zealand TEOs (2012)[20]



New Zealand has a unified national qualification system which allows the integration of work based and institution based learning. It has an employer owned industry training system which links employers and providers in a training system which delivers a high level of performance, particularly in trades and primary sectors.[21]

The New Zealand Tertiary Education Organizations have been able to compete in the TVET export services market. New Zealand has the geographic advantage of being close to a number of potential markets for export TVET, and in particular the developing economies amongst the ASEAN countries and Pacific Islands. New Zealand is a net importer of tertiary students. By offering students flexibility and working closely with industry, New Zealand Tertiary Education Organizations are respected and popular education institutions amongst the education community. New Zealand boasts the second highest[22] entry rate into tertiary vocational education programmes in the Organisation for Economic Cooperation and Development (OECD) segment.

[19] *Presentation by Tim Fowler, Chief Executive, Tertiary Education Commission made to India Skills Delegation, April 2013- Overview of New Zealand Tertiary Education System*

[20] *International Students Enrollment in New Zealand, International Division, Ministry of Education, Government of New Zealand*

[21] *Presentation by Tim Fowler, Chief Executive, Tertiary Education Commission made to India Skills Delegation, April 2013- Overview of New Zealand Tertiary Education System.*

[22] *Partnering with New Zealand Institutes of Technology (Quality Education and skills training for global workspace)*

Publicly-owned TEOs are called Tertiary Education Institutions. These Include 8 universities, 3 Wānanga, and 18 Institutes of Technology and Polytechnics (ITPs)[23]. Within this, Universities focus on higher education; ITPs deliver to any level but focus on higher education and foundation education while Wānanga deliver at all levels, focusing on Māori cultural practices and knowledge. All types of institutions recognised by the government can award degrees to the students, subject to rigorous accreditation and approval process provided by NZQA

Private TEOs include Private Training Establishments (PTEs) deliver to any level, but are specialised. PTEs are operated by a wide range of companies, trusts and other entities, and offer post-school education or vocational training. They are diverse in terms of their scale of operation, location, ethnicity, culture and areas of educational expertise. Because of this they respond to the broad range of needs of the learner, the industry, the employers, communities as well as Māori and Pacific peoples and other stakeholders.

Industry Training Organisations (ITOs) are private organisations funded by the Government to arrange training for employers, but they do not provide training directly (hence are not "providers").

There are TEOs in New Zealand who are unique in their status and do not fit well with any of the aforementioned categories. These TEOs are often specialists in their field. One such example is Taratahi Agricultural Training Centre (Taratahi). Although a TEO, Taratahi's own Act of Parliament specifies that for strategic oversight and governance, it reports to the Minister of Primary Industries in New Zealand.

Community providers are community groups and schools, mainly funded for ACE (Adult & Community Education) and Gateway (for schools) which gives secondary school students a taste of work experience.

ITPs, 18 in number, are specialist government tertiary education institutions. ITPs deliver applied technical and professional education and skills training to produce work-ready graduates needed by business and industry. ITPs undertake ongoing self-assessment to identify areas for quality improvements and are subject to external evaluation and review, which provides an independent judgement on the institute's educational performance and self-assessment capability. Institutes also report to the government on key outcomes, including qualifications, course completions and student satisfaction.

[23] *Presentation by Tim Fowler, Chief Executive, Tertiary Education Commission made to India Skills Delegation, April 2013- Overview of New Zealand Tertiary Education System.*

ITPs offer flexibility for students who can choose to study on campus, complete a qualification through distance education or combine the two. Students can also benefit from the large number of entry points into qualifications, and multiple study pathways within and across industries.

New Zealand's ITPs are world leaders in the assessment of prior learning for mature professionals who have learned at the school of life but who now wish they had the qualifications to prove it. ITPs are training the next generation of highly skilled trades' people through their involvement in the modern apprenticeship programmes [24].

Industry Training Organisations (ITOs) are recognised under the Industry Training Act 1992[25]. There are around 20 ITOs established by different industries under corresponding trades. Most Industry Training Organisations are also accredited to register assessors for the Directory of Assessment Standards. They are responsible for

- providing information and advice to trainees and their employers
- arranging for delivery of on/off-job training (including developing training packages for employers)
- arranging for the assessment of trainees and
- arranging the monitoring of quality training

The ITO system was a solution to the divide between college delivered learning content and the need of industry relevant qualifications and employable workmen. ITOs created an intermediary relationship between employer and training provider, which improved the apprentice's experience by providing an external mentor. ITOs are owned by industries, recognised by the government, and receive funding from both government and industry. ITOs cover most of New Zealand's industries from traditional trades like building and plumbing, the primary industries, and manufacturing and retail, through to government and community services.[26] ITOs also monitor the employers offering apprenticeships whose role it is to facilitate the apprentice's learning experience. This has resulted in New Zealand apprentices to participate at rates that compare favourably with the best in the commonwealth countries and have higher completion rates than their equivalents .[27]

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[24] *Partnering with New Zealand Institutes of Technology (Quality Education and skills training for global workspace)*

[25] *Partnering with New Zealand Institutes of Technology (Quality Education and skills training for global workspace)*

[26] *http://www.tec.govt.nz/Tertiary-Sector/Types-of-TEOs/Industry-Training-Organisations/*

[27] *Delivery of Technical Vocational Education and Training (TVET) to international markets, Skills Consulting Limited on behalf of Education New Zealand*

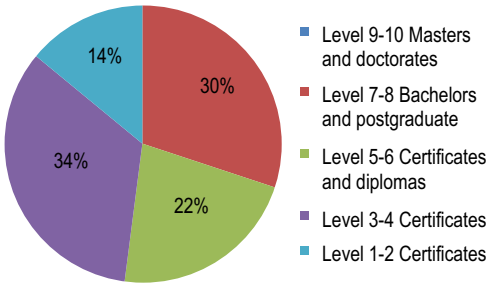
The New Zealand Qualifications Framework (NZQF) encompasses a comprehensive list of quality assured qualifications in New Zealand. All qualifications listed on the NZQF fit into a qualification type: a certificate, diploma or degree. Each qualification type is defined by an agreed set of criteria which includes the level at which the qualification is listed and the number of credits required at each level .[28]

The NZQF has ten levels. Levels are based on complexity with level 1 being the least complex and level 10 being the most complex [29]. All qualifications on the NZQF are assigned one of the ten levels. It is possible for qualifications to include credit achieved at levels above and below the overall level at which the qualification is listed.

Fig 7 : New Zealand Qualification Matrix by Levels[30]

Level	Naming Sequence
10	Doctorates
9	Masters Degrees
8	Post Graduate Diplomas and Certificates, Bachelors Degree with Honors
7	Bachelors Degree, Graduate Diplomas, Graduate Certificates
6	Diplomas
5	
4	Certificates
3	
2	
1	

Fig 8 : Student Composition in NZ by Qualification (2011)[31]



Amongst total number of students studying at different ITPs, 34% fall under 'Level 3-4 certificate' qualifications followed by level 7 bachelors and level 8 post graduate qualifications at 30%.

Vocational pathways are a new tool that provides a clear framework for vocational options, support better programme design and careers advice, and improve the links between education and employment. They are the product of a partnership between government agencies, the industry training sector, secondary and tertiary education representatives, and industry and employer representatives.

[28] *Presentation by Tim Fowler, Chief Executive, Tertiary Education Commission made to India Skills Delegation, April 2013- Overview of New Zealand Tertiary Education System*

[29] *Partnering with New Zealand Institutes of Technology (Quality Education and skills training for global workspace)*

[30] *Presentation by Tim Fowler, Chief Executive, Tertiary Education Commission made to India Skills Delegation, April 2013- Overview of New Zealand Tertiary Education System.*

[31] *Partnering with New Zealand Institutes of Technology (Quality Education and skills training for global workspace)*

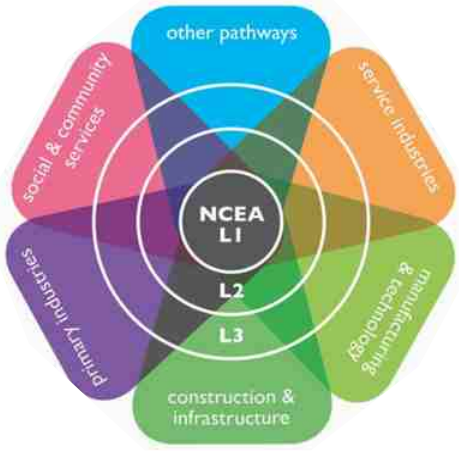
There are five pathways which represent new ways to structure and achieve NCEA level 2 and provide a more coherent framework for foundation vocational education and training .[32]

The pathways help students to develop their own individual education plan, so they are better informed and able to make better choices to meet their goals. The Vocational pathways show which NCEA credits are valued by employers in different industries; what the main jobs are in that industry; and what level of qualification one would need to do each job. This means students can be sure that their study choices at school are leading to their desired objectives and also helps them see the whole journey through study into their preferred industry.

The Government set 10 goals in 2011 for the public service to deliver on, of which two are relevant to tertiary education - one for foundation skills and one for high-level skills. The first goal is to have 85% of 18 year olds having NCEA level 2 (High School) or equivalent in 2017 (currently 74%) and the second goal is to have 55% of 25-34 year-olds with a qualification at Level 4 or above in 2017 (currently 52%).[33]

The 'secondary-tertiary programmes' have been a big change for New Zealand for the past five years. The Government's aim is to make sure all young people have basic skills and to transition as many students as possible from secondary-tertiary programmes to higher levels of study.

Fig 9: New Zealand Vocational Pathways



[32] *Presentation by Tim Fowler, Chief Executive, Tertiary Education Commission made to India Skills Delegation, April 2013- Overview of New Zealand Tertiary Education System*

[33] *Source: Presentation by Tim Fowler, Chief Executive, Tertiary Education Commission made to India Skills Delegation, April 2013- Overview of New Zealand Tertiary Education System.*

4 New Zealand Training Capabilities and Complementarities with Indian Needs

The New Zealand tertiary education system is sector focused and forms the backbone of the strong economy of the country. The New Zealand TVET system has built strong capabilities which can be leveraged by Indian vocational education players for collaboration.

The strengths of New Zealand TVET[34] can be summarised as follows:

- A unified national qualifications system which allows the integration of work-based and institution based learning. New Zealand TVET has significant experience with a single national qualifications framework and national vocational pathways which support the progression of learners through primary and secondary education and within the TVET system itself
- Student centred and flexible learning delivered across various learning platforms through a modular qualification system
- A market responsive quality assurance system which recognises competence and devolves authority to it while retaining oversight and the ability to drive change through the system
- An employer owned industry training system which delivers cost effective and high quality delivery of training in both industrial trades and the primary sectors
- A group of 18 Institutes of Technology and Polytechnics who offer market oriented training programmes with strong linkages to the employment market both through the apprenticeship system and the employment system
- New Zealand is a world renowned leader in a variety of primary industries, such as dairy farming, seafood and viticulture, and has built significant capabilities in training for the primary industries

Sectoral capabilities of New Zealand TVET providers can also be established through student enrolments and the courses offered in various ITPs. The subject streams which

[34] *Delivery of Technical Vocational Education and Training (TVET) to international markets, Skills Consulting Limited on behalf of Education New Zealand*

capture near 50% of enrolments are Management and Commerce, Health, Society and Culture and Creative Arts, amongst which Health and Creative Arts will lend to the sectors for vocational education and training.

Fig 10: Student Enrolment in New Zealand TVETs by Field of Study and Level of Study (2012)

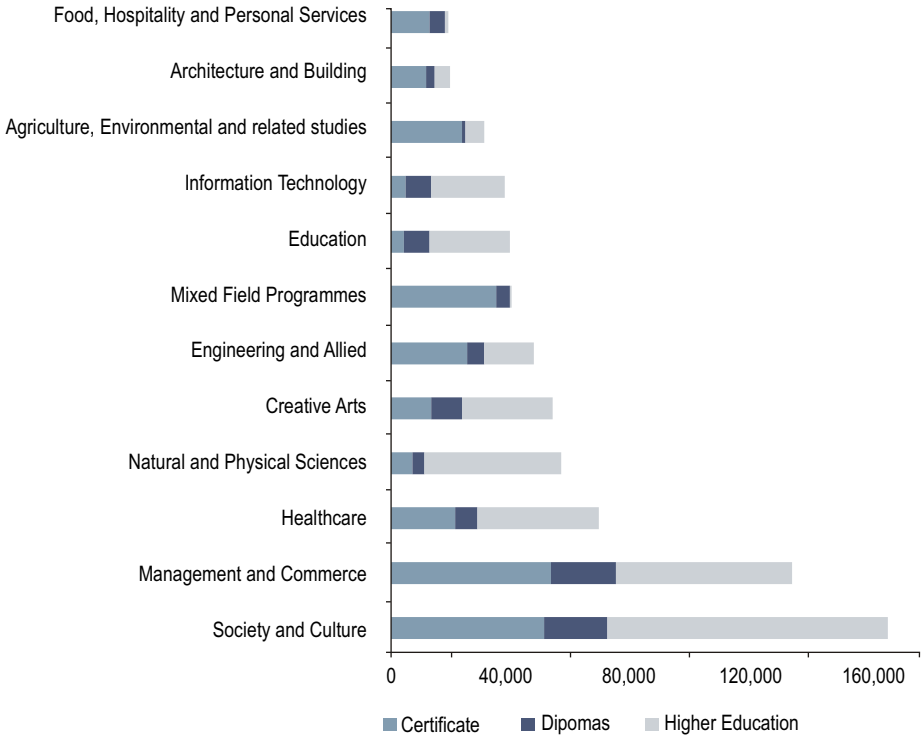


Figure 9 depicts the student enrolment in New Zealand TVETs by field and level of study [35]. Analysing the streams which would lend into sectors for vocational training, Hospitality and Tourism, Media and Entertainment, Healthcare and Design emerge as the top four.Hospitality and Tourism, Agriculture and Food Processing, Media and Entertainment, Healthcare and Design (Creative Arts) are the major industries covered by ITPs in their sector oriented training programmes.

Hospitality and Tourism offers the maximum of 235[36] courses including the traditional courses like Chef Training, Tourism and Hospitality, Beauty and Health, etc. along with specialised courses like Café and Bar operations, Adventure Tourism, Travel Studies, etc.

[35] *http://www.educationcounts.govt.nz/statistics/tertiary_education/participation*

[36] *ITP Course Summary (Education New Zealand)*

Courses offered in Media and Entertainment cover most aspects of the industry such as Arts, Design and Fine Arts, Photography, Animation, Film and Television, etc. ITPs also offer specialised courses in Journalism, Audio Engineering etc.

Courses offered in the Healthcare sector are in traditional and specialised segments such as Nursing, Health Sciences, Exercise Sciences, Early Childhood Studies, Addiction Studies and Disability Support Studies, etc.

Courses offered in Design cover a wide scope of the industry including Architectural Design, Fashion Design, Interior Design and Jewellery and Metal-smithing.

New Zealand is a world renowned leader in a variety of primary industries, such as Dairy Farming, Seafood and Viticulture, and has built significant capabilities in training for the primary industries. Hence, courses on Agriculture and Food Processing are also key offerings from the TVET system. Expertise in these specialised subject areas could be leveraged by the providers to create TVET export opportunities in developing countries like India.

Opportunities for skill development in India for New Zealand are based on an analysis of the overall attractiveness of each sector considering

- Demand for skill training: Estimated based on the incremental increase in skilled human resource requirements for the sector based on NSDC projections[37] for 2012-22
- Value Attached to Training[38] : Estimated based on present entry level salaries for skilled job roles in the sector and youth preferences for employment in the sector assessed through focused group discussions of target segments
- Government Thrust[39]: Impetus from the Government of India towards skill development in the sector through focused schemes/training initiatives.
- New Zealand Capabilities/ Aspirations[40]: Based on an analysis of the New Zealand TVET landscape and focused discussions with ENZ management

[37] *NSDC Skill Gap Analysis Reports, KPMG Analysis*
[38] *KPMG Analysis, Focused Group Discussions*
[39] *KPMG Analysis*
[40] *KPMG Analysis, Workshops with ENZ Management*

Service/Application	Incremental human resource requirement (2012-22)	Value attached to training	Government thrust on skill development in the sector	Synergies with New Zealand TVET capabilities and aspirations	Overall attractiveness
Agri and Food Processing					
Healthcare					
Media and Entertainment					
Travel, Tourism and Hospitality					
IT/ITES					
Automotive					
BFSI					
Building and Construction					
Organized Retail					

Attractiveness Index (Relative Parameter)

– Low – Medium – High

Based on attractiveness analysis, the following four sectors have been shortlisted for further study:

- Agri and Food Processing
- Healthcare
- Media and Entertainment (Creative Arts)
- Hospitality and Tourism

5 Opportunities for New Zealand in Indian Vocational Education System

5.1. Agriculture and Food Processing

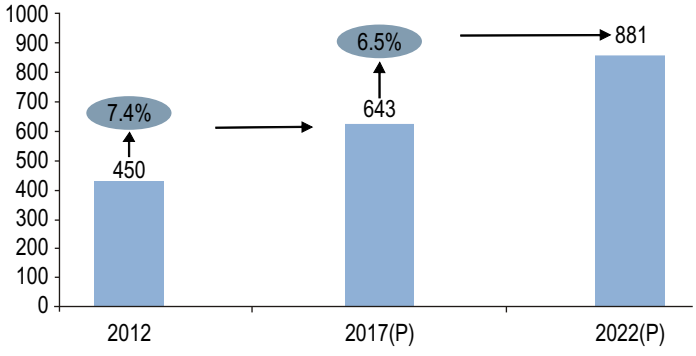
Industry Overview

The Indian Agri-business industry is estimated to be valued at USD 450 billion[41] in 2012. The industry comprises of various activities across the food value chain including farming, contract farming, seed supply, agrichemicals, farm machinery, wholesale & distribution, processing, marketing and retail sales of food and non-food farm commodities and products with cultivation being the main source of livelihood for the majority of the Indian population. While the size of the agricultural sectors in India are comparable to that of leading economies like the US, the corresponding contribution in food and retail is low signifying an immediate potential for the food sector to grow in India.

A strong government policy thrust with initiatives such as setting up of mega food parks, enhanced FDI levels across the food sector, financial assistance to food processing industries, the National Mission on Food Processing (NMFP) and export promotion policies are expected to drive growth in the agri-business sector over the next decade. Considering the market conditions and growth enablers, the industry is projected to grow at 7.4% CAGR[42] during the period 2012-17, which is estimated to be normalised to 6.5% CAGR[43] for the period 2017-22 indicating the crucial role that the sector will play for the Indian economy and employment.

[41] *KPMG Assocham Report 2012, Taming food inflation through innovations in agri-business*
[42] *KPMG Assocham Report 2012, Taming food inflation through innovations in agri-business*
[43] *KPMG Assocham Report 2012, Taming food inflation through innovations in agri-business*

Fig 11: Indian Agri Business Market Size (USD Billion[44]



Crop production and cultivation activity in India is highly unorganised, dominated by small-marginal farmers. The Food processing industry has witnessed a significant penetration of organised players over recent years. The organised market accounts for less than 25% and SSI sector accounts for nearly 33% of the market. Key players in the food processing segment include

- **Multi National Companies:** Nestle, Pepsi, Kellogg's, Conagro, Perfetti, Heinz, Nissin
- **Indian Companies:** ITC, Dabur, Britannia, Parle, Amul, Venky's, Haldiram

Human Resource Requirements in the Industry

The Primary Sector including agriculture, fisheries and forestry is a key employer in India with nearly 48.9%[45] of the overall country's workforce employed in the segment accounting for 120 million[46] workers in 2012. While the primary sector remains a major source of employment in India, the number of skilled workers in this sector is still limited. Less than 20%[47] of the total agricultural workforce is skilled.

Dependency on agriculture and allied activities is high in rural areas, with a significant portion of the agrarian workforce underemployed due to the seasonal nature of cultivation. An increase in the level of mechanisation and growing employment opportunities in urban clusters is expected to drive a net outward displacement of the workforce from cultivation during the period 2012-22. During the period 2012-22, an estimated 40 million people[48] need to be trained in cultivation, food processing and

[44] *KPMG Assocham Report 2012, Taming food inflation through innovations in agri-business*
[45] *NSSO 68th Round of Employment-Unemployment Survey, 2011-12*
[47] *NSSO 68th Round of Employment-Unemployment Survey, 2011-12*

allied- agricultural activities. Key skill requirements in the sector include:

- **Food Processing Industry:**

  Core Skills: Trades of Fitter, Electrician, Wireman, Instrumentation, Lab Technician

  Allied Skills: Trades of instrumentation, Packaging (Jar, Pouch) Operator, AOCP, Lab Attendant, Boiler Operator, QC Chemists along with housekeeping and maintenance staff

  Skills with Acute Shortage: PPO is required in industries having in-house packing development.

- **Agriculture- Allied Activities:**

  Core Skills: Modern rearing techniques for live stock, pigs, goats and aquaculture

  Allied Skills: Knowledge on preliminary processing techniques for value enhancement

  Skills with Acute Shortage: Marketing and distribution of forest/animal husbandry produce

- **Cultivation:**

  Core Skills: Knowledge on high yield varieties, micro nutrients and pest control, organic farming and vermi compost methods, micro irrigation techniques

  Allied Skills: Knowledge on food processing techniques and related procedures to extract greater value from farm produce

  Skills with Acute Shortage: Usage and repair of farm equipment, marketing and management practice

[48] *NSSO Data, KPMG Analysis, Planning Commission Estimates on Projections of Labour Elasticity*

Human Resource Supply Scenario

Skills Development in the agriculture and food processing industry is predominantly driven by Government along with sponsored training through initiatives under CSR (corporate social responsibility). The Department of Agriculture along with the Department of Rural Development offer skill development programmes in agriculture and allied activities through scheme based funding to third party service providers. Flagship Central Government schemes like SGSY, SJSRY and MNREGA have training components to better the livelihood of below poverty line communities in both rural and urban areas.

Technical institutions monitored by AICTE offer engineering/diplomas in food technology. Government and private ITIs offer generic trades like fitter, welder, electrician, motor mechanic along with sector specific trades like food process technician accredited by DGET. NSDC partner training institutes and other private training players offer industrial trades providing their own certifications. Leading institutes in the sector include

Leading Institutes in Agriculture and Food Processing	Leading Vocational Training Institutes (Foundation Programmes)
• Anand Agricultural University • Agricultural University of Punjab • Tamilnadu Agricultural University, Coimbatore • Acharya N G Ranga • Birsa Agricultural University	• Pratham • I-Skill • B-ABLE • Skill Ventures Private Limited • Paniit Alumni Reach For India • Global India Foundation • Drishtee Foundation

Leading Food Processing Companies in India	Leading Food Retail Companies in India	States Bodies associated with Agri and Food Processing Education
• Nestle • Britannia • Pepsico Foods • Rei Agro • GlaxoSmithKline • Kwality Dairy • Hatsun Agro • KRBL	• Reliance Fresh • Future Group - Food Bazaar • Spencers • More(Aditya Birla Group) • Bharti Retail • Fab Mall • Trinethra	• Ministry of Agriculture • Ministry of Food Processing Industries • NSDA • NSDC • Agriculture SSC • Food Processing SSC

Industry Perspectives on Skill Development

Skill requirements in the agriculture and food processing sector have been analysed based on industry interactions to understand the qualitative aspects of manpower needs. Detailed industry interactions have revealed the following concerns/issues in the skilling needs of the industry[49].

- There is a great need to train cultivators on micro irrigation techniques considering the seasonal nature of rains in certain parts of the country
- Government needs to design a comprehensive learning policy targeting farming communities by integrating skill development with flagship schemes like MNREGA
- Marketing and financing knowledge among farming communities is poor
- Lack of understanding on advanced rearing techniques for dairy, sheep and poultry among allied category workers

Opportunities for New Zealand

Capabilities in vocational training and delivery in agriculture is a key strength for the New Zealand vocational training system. The delivery of agriculture training is largely through government funded institutions or bodies. Agri related training programmes are delivered across all levels of the New Zealand Qualifications Framework (NZQF) up to PhD level. The strength of New Zealand lies in the areas of dairy, pasture irrigation, soil testing and sheep breeding. A myriad of courses are offered in the sector of which 50% are in foundation level having direct synergies with vocational training in India. Leading institutes in this segment in New Zealand are

- **Industry Training Organisation, Primary ITO:** The organisation has worked on Chilean Government projects aimed at developing Chilean agricultural training along the lines of New Zealand-type industry training
- **Taratahi:** Taratahi Agricultural Training Centre (Taratahi) is New Zealand's oldest and largest vocational agricultural training centre. Training students from New Zealand and around the world, Taratahi are both farmers and educators. Known for their 'real training on real farms' teaching philosophy, programmes cater for many different learning needs including programmes for secondary school students, preparing for work, up skilling once in the workforce and also disseminating research and best practice. Programmes can range from train the trainer programmes to custom-made

[49] *KPMG in India Analysis and industry discussions*

programmes which are contextualised to ensure relevance to many different farming contexts right through to 1-2 year programmes. Most recently, Taratahi has delivered train the trainer programmes for tutors from Guizhou Animal Husbandry School and Dairy technician programmes for Indonesian Dairy Farmers (in partnership with Massey University and Fonterra).

- **National Trade Academy:** NTA has collaborated with the Chilean Ministry of Agriculture to provide agriculture training in New Zealand for graduates of rural agriculture schools in Chile.
- **Lincoln University:** Lincoln offers joint programmes with Henan Agricultural University, China[50] in animal science and agronomy. Lincoln University in collaboration with Sarawak Timber Association in Malaysia (along with cooperation from the Sarawak Forestry Corporation and the Sarawak Forest Department) developed a Postgraduate Diploma in Applied Science (Sustainable Tropical Forest Management) for managers in the logging industry[51]
- **Massey University:** Massey offers joint programmes with Singapore Polytechnic in Bachelor of Food Technology (Honours) degree programmes at the Singapore campus. Massey has also signed MoUs with leading food technology institutes across the US, China and European Union for enhancing cooperation in the areas of research and training.

Considering the strengths of New Zealand training institutes and the requirements of Indian industry, New Zealand TVET providers could explore opportunities to collaborate in the areas of:

- Collaboration with Government to develop curriculum and content for training programmes on modern techniques in dairy and animal husbandry areas.
- Train the trainer services for irrigation and cultivation training institutions in India covering pasture irrigation and micro irrigation
- Corporate tie-ups with food processing industries on technologies in food processing
- Provision of independent assessment and certification services to Indian VET providers to align programmes to New Zealand qualifications in diary, sheep rearing and animal husbandry

[50] *http://www.lincoln.ac.nz/News--Events/News/Current/Playing-its-part-in-Pacific-Lincoln-University-signs-new-MOU-with-PNG/*
[51] *http://www.lincoln.ac.nz/Documents/Marketing/Publications/Annual-Reports/2012-Annual-Report.pdf*

Summary of Skill Training Opportunities[52]

Partner/Areas of Collaboration	Curriculum	Content Development	Delivery/ Train the Trainer	Infrastructure	Assessment	Certification	Further Education
Training Institutes							
Government							
Corporate							
SSC							

Case Studies of Indian Collaborations

National Institute of Food Technology Entrepreneurship and Management

NIFTEM was established by the Ministry of Food processing industries with the vision of creating an apex institute in the field of Food Technology and Management which would cater to the needs of various stakeholders such as industry, government and existing institutes.

Along with graduate and post graduate programmes NIFTEM also offers Continuing Education programmes which are any post-secondary education certifications for updating sector specific skills and knowledge. These short duration non-credit courses are sought to bridge the skill gaps across the comparatively unorganised food processing sector.

To bring in global expertise and a methodology to Indian Food Processing sector, NIFTEM, in 2008 signed a Memorandum of Understanding with the College of Agriculture and Life Sciences at Cornell University to collaborate in the fields of Human resource development: industry oriented innovation and applied research. In 2012, NIFTEM signed a MOU with Kansas State University which included the development of mutually beneficial academic programmes, courses and distance learning facilities.[53]

Partnership in Skill Development Value Chain

Curriculum	Content Development	Delivery/ Train the Trainer	Infrastructure	Assessment	Certification	Further Education

[52] *KPMG Analysis*
[53] *NIFTEM website and KPMG Analysis*

5.2. Media and Entertainment

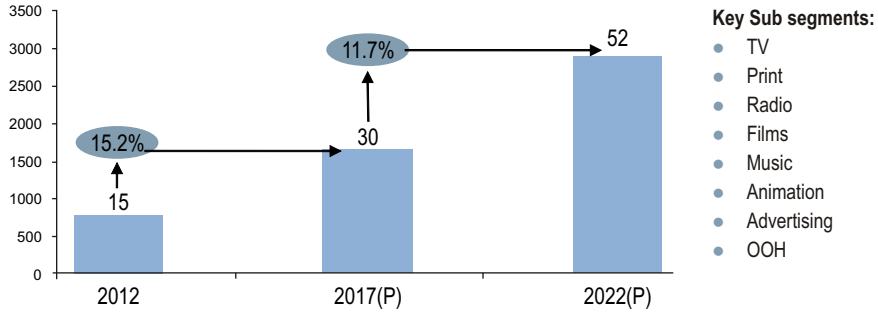
Industry Overview

The Indian Media and Entertainment (M&E) industry, with a size of USD 15 billion[54] in 2012 is among the fastest growing sectors in India. The M&E Industry has demonstrated a steady growth 12.6%[55] during 2012-13, despite a sluggish macro economic outlook with 5%GDP growth. The industry is estimated to achieve a healthy growth of 15.2% CAGR and reach a market size of USD $30b by 2017. The growth in the M&E industry is driven by the following factors

- Digitization of content and transmission
- Continued growth of regional media
- Rising spend on entertainment by the growing Indian middle class
- Upcoming general elections in 2014
- Strength in the film sector and fast increasing new media businesses
- Increased corporate investments

Technological advances and liberal government policies favouring foreign direct investment (FDI) would also aid expansion in the long term growth over the next decade. The Industry is estimated to reach USD 52 billion[56] by 2022 growing at a cumulative rate of 11.7%[57] during 2017-22.

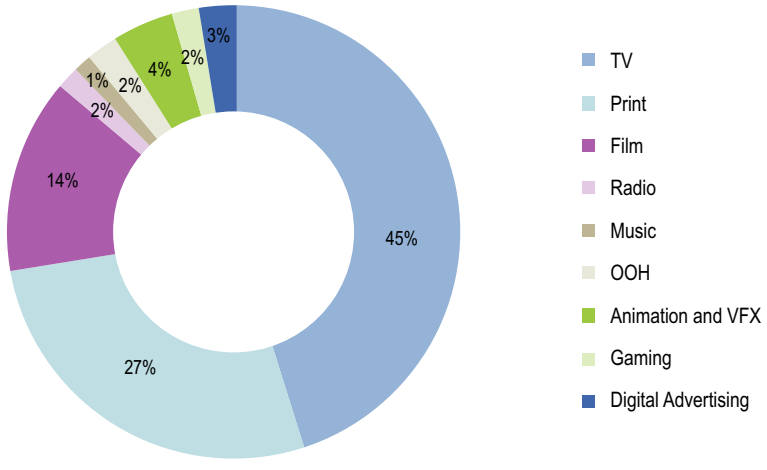
Fig 12: Indian Media and Entertainment Industry Market Size (USD Billion)[58]



[54] *KPMG in India Analysis and industry discussions ;FICCI Frames Report on Media & Entertainment Industry 2013*
[55] *KPMG in India Analysis and industry discussions ;FICCI Frames Report on Media & Entertainment Industry 2013*
[56] *KPMG in India Analysis and industry discussions*
[57] *KPMG in India Analysis and industry discussions*
[58] *KPMG in India Analysis and industry discussions;*

Among the sub-segments, television clearly continues to be dominant. However, the industry has witnessed strong growth from new media sectors, animation/ VFX over recent years. Radio is anticipated to see a spurt in growth post rollout of Phase 3 licensing in India[59] . The FM Phase-Ill Policy extends FM radio services to about 227 new cities, in addition to the present 86 cities, with a total of 839 new FM radio Channels in 294 cities. The Phase -III policy will result in coverage of all cities with a population of one lakh and above with private FM radio channels[60] .

Fig 13: Contribution of sub-segments to Media & Entertainment Industry- 2012, USD 15 Billion[61]



Key Players: B.A.G Network (News24 & E24), NDTV, Star network, Sony Entertainment Television, Zee Telefilms, Hindustan Times, Living Media India, and Balaji Telefilms.

Human Resource Requirement in the Industry

The M&E sector is expected to provide significant employment opportunities across creative, technical and business areas. Under the National Skill Development Policy 2009, the National Skill Development Council (NSDC) has constituted a Media and Entertainment Skill Council (MESC)[62] , which will focus on the television, print, films, radio, animation, gaming and advertising industries to meet the human resource requirement of over 11.7 million people[63] during the next 10 years

[59] *KPMG in India Analysis and industry discussions*
[60] *http://pib.nic.in/newsite/erelease.aspx?relid=73067*
[61] *KPMG in India Analysis and industry discussions ;FICCI Frames Report on Media & Entertainment Industry 2013*
[62] *www.nsdcindia.org/pdf/sector-skill-council-newsletter-aug-2012.pdf?*
[63] *National Skill Development Corporation*

Contribution of Segments to Incremental Human Resource in Media & Entertainment Industry (2012-22)	
TV and film production	29%
Distribution of TV content	48%
Distribution of film content	16%
Print	1.50%
Animation	1%
Gaming	0.50%
Radio	4%

Key Skill Requirements[64] for the industry include:

Film/TV Production: Directors, Cinematographers, Editors, Scriptwriters, Srtists, Sound Designer/Editor, Production Managers .

Animation: Preproduction, Animator

Gaming: Game Design, Game Developer

Radio: Radio Jockey

Others: Journalists (Mass communication), Videographer etc.

Human Resource Supply Scenario

Skills development in the Media and Entertainment sector is dominated by private institutes offering programmes in mass communication, Journalism (Print & Broadcast), Advertising, PR & Event Management, Media management and Editing. Most of the training programmes are run in vocational streams with some institutes offering bachelors / Masters degree in Mass Communication and Journalism. Streams like Radio jockeying and lighting are likely areas suited for a vocational diploma programmes as no major institutes offer such programmes in India.

Programme portfolios of leading media & entertainment institutes indicate that most of the training programmes in India are 1-2-yearears duration postgraduate diploma programmes. Some of the leading institutes include:

[64] *KPMG in India Analysis and industry discussions*

Leading Institutes in Media & Entertainment Education	Leading Vocational Training Institutes (Foundation Programmes)	Training initiatives of Corporate
• Asian College of Journalism • Symbiosis Institute of Media and Communication • MICA • IIJNM • Whistling Woods International	• 24×7 Learning Private Limited • NIIT Limited • L S Talent Transformation Manpower Pvt. Ltd. • Future Human Development Limited • Everonn	• B.A.G Network - International School of Media and Entertainment Studies • Zee - Zee institute of Media Arts • Times Group - Times Centre of Media studies • NDTV - NDTV broadcast journalism programme • Pioneer - Pioneer Media School • Annapurna Film Training Institute
Leading Corporates in the Media and Entertainment Industry		**State Bodies associated with Media and Entertainment**
• B.A.G Network (News 24 & E24) • NDTV • Pioneer Media House • Star India • New Delhi television • Bennett, Coleman & Co. • Reliance Entertainment	• Sony Entertainment Television • Zee Telefilms • Hindustan Times • Balaji Telefilms • Television Eighteen India • Malayala Manorama & Co • Dainik Jagaran • Sun Group	• Ministry of Information and Broadcasting • University Grants Commission (UGC) • NSDA • NSDC • Media Sector Skills Council

Industry Perspectives on Skill Development

Skills requirements in the M&E industry have been analysed based on industry interactions to understand the qualitative aspects of manpower needs. Detailed industry interactions have revealed the following concerns/issues in the skilling needs of the industry.[65]

- The Industry is hampered by a talent crunch across sectors. Critical skills such as lighting, scriptwriting, electric work and content editing are facing an acute skill shortage.
- Practical knowledge occupying a key role in learning and industry interaction is sought after in media and journalism.
- Anticipated changes in the industry including digitisation, the growth in multilingual markets, new technologies and convergence, require additional skill sets.

[65] *KPMG in India Analysis and industry discussions*

- A need for investment in credible media institutes, with quality faculty and a relevant and dynamic curriculum.
- Current courses have an excessive focus on journalism, at the cost of other areas such as television production, writing and editing
- Industry accreditation matters - carries stamp of course relevance to industry needs
- Talent conversant in English is in short supply - getting good people who can speak and present well is a challenge

Opportunities for New Zealand-TVET

New Zealand is home to a broad range of creative industries. Media production is a key creative industry in the country with a market size of USD 3.29 billion[66] in 2012. Income from production and post-production made up more than half of the total industry size, at USD1.67 billion. In 2012 feature film revenue rose 47% to just over USD1 billion, making up almost a third of all production and post-production revenue. The New Zealand media industry is famous for producing globally acclaimed movies such as the The Hobbit, King Kong and The Lord of the Rings.

The strength of New Zealand media training institutes lies in Animation, Arts, Design and Fine Arts, Audio Engineering, Broadcasting Communications, Fashion Design and Technology, Interior Design, Film and Television, Media and Communications and Visual Arts. A total 18 ITPs in New Zealand offer 188 courses in the 'Creative Arts' stream. Of the courses 31% are at foundation level having direct synergies with vocational training in India. Leading institutes in media and entertainment training in New Zealand are

- Institute of Technology- CPIT
- Institute of Technology- Unitec
- Institute of Technology - Whitireia

Considering the strengths of New Zealand training institutes and the requirements of Indian industry, New Zealand TVET providers could explore opportunities to collaborate in the areas of

- Content creation for new age technologies in production, post production (editing) and special effects
- Train the trainer services for private VTPs in India
- Train the trainer, assessment and certification services for SSCs

[66] *KPMG in India Analysis and industry discussions ;FICCI Frames Report on Media & Entertainment Industry 2013*

5.3. Healthcare Industry

Industry Overview

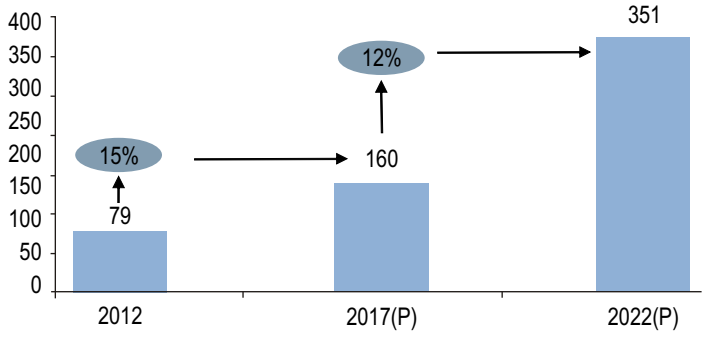
The Indian Healthcare industry was estimated at USD 79 billion in 2012 and is expected to grow to USD 351 billion[68] by 2022. The Healthcare industry in India is driven by significant government expenditure in the sector along with private play.

The Union budget for 2013-14 has allocated USD 6.46 billion for a new national health mission and USD 817 million[69] for medical education, training and research.

India is emerging as a major medical tourism destination, with an estimated market size of USD 2 billion[70] in 2012, for low cost tertiary healthcare facilities in areas like cardiology, joint replacement, orthopaedic surgery, and transplants. Government initiatives of mass insurance programmes and the increased penetration of private insurance in the 300 million middle income category population are expected to boost healthcare sector growth over the next decade.

The Healthcare industry has seen significant foreign investment with a provision for 100% direct FDI in the healthcare sector[71] contributing to the growth of the sector.

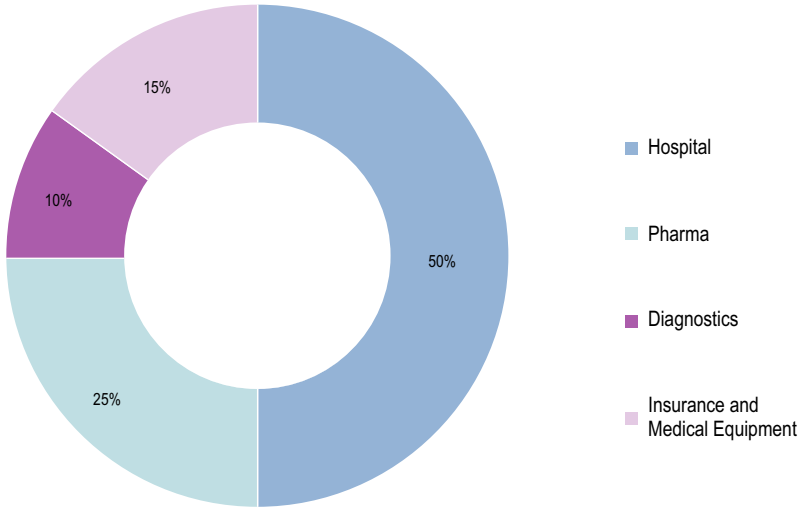
Fig 14: Healthcare Industry Market Size (USD Billion)[72]



Hospitals, pharma, diagnostics, insurance and medical equipment are key sub segments within the industry. Hospitals account for a majority share of the industry along with diagnostics accounting for 75% of the overall industry. The Insurance segment is the fast growing segment among the sub sectors

[68] *KPMG Assocham Report on Emerging Trends in Healthcare, 2011*
[69] *KPMG Analysis, Indian budget 2013-14*
[70] *KPMG Analysis*
[71] *KPMG Analysis*
[72] *KPMG Assocham Report on Emerging Trends in Healthcare, 2011*

Fig 15: Composition of Indian Healthcare Industry (2012)[73]



Human Resource Requirement in the Industry

Despite maintaining a steady growth in the healthcare sector, India still has a severe shortage of healthcare infrastructure. The Indian healthcare infrastructure is significantly below the benchmark of various developed and developing countries. India needs huge additional investments, with adequate private sector support to meet its development goals by 2022 including [74]

- Requirement of 2.7 mn additional beds to achieve target of two beds /thousand population by 2022
- 600 additional medical colleges (100 seats / college) required to meet global average of 1.23 physicians and 2.56 nurses per thousand population in next 15 years
- Bridging the Rural/ Urban divide - 70% of the hospitals are in urban areas where only 30% of the country's total population reside

Manpower requirement in healthcare industry is estimated to be more than double by 2022 to meet the envisaged healthcare targets for India across the key roles in the industry. As per EIU estimates the industry would have the potential to absorb an additional 8.1 million workforce[75] during 2012-22. Considering the migrational tendencies of healthcare professionals, overall demand would be even higher than the domestic requirements.

[73] *KPMG Assocham Report on Emerging Trends in Healthcare, 2011*
[74] *Ministry of Healthcare, Govt of India*
[75] *EIU,European Intelligence Unit, Epsicon Estimates*

Contribution of Segments to Incremental Human Resource in Healthcare Industry (2012-22)[76]	
Technical and Support Staff	17%
AHPs	19%
Doctors, Nurses and healthcare delivery professionals	64%

Key skill requirements in the industry include:

Doctors, nurses, allied health professionals (AHPs), physiotherapists, occupational therapists, pharmacists, technical personnel, hospital attendants, ambulance drivers and support staff.

Human Resource Supply Scenario

Skills Development in the healthcare industry is regulated by the Medical Council of India (MCI) for programmes catering to healthcare delivery. MCI recognises institutions which offer traditional graduate and post graduate level programmes across different disciplines which mainly cater to the manpower requirement for doctors (MBBS, MS, MD). The Nursing Council of India acts in he same way for nursing (BSc and MSc) courses.

Other government and private institutions offer courses across job roles relevant to vocational education including paramedics, administrative and clinical support staff. These courses include diplomas at graduate level (with or without work experience), BSc and MSc courses. Hospitals have tied up with several universities, colleges and education service providers to jointly offer specialised training programmes. Some of the hospitals which offer courses through collaborations include Apollo Hospitals, Care Hospitals and Madras Medical Mission.

The Academy for Clinical Training (ACTA) is the first simulation based training institute in India and has courses for all clinical professionals including nurses, paramedics, and physician assistants. ACTA is the training partner for several healthcare institutions, accredited by the National Accreditation Board for Hospitals (NABH). Some of the leading training institutes in the sector include[77]

[76] *KPMG Analysis*
[77] *KPMG Analysis*

Leading Institutes in Healthcare Education	Leading Vocational Training Institutes (Foundation Programmes)	Training initiatives of Corporate
• AIIMS, New Delhi • JIPMER • CMC Vellore • Ramachandra Medical College • Kasturba Medical College	• NIIT Limited • IIJT • GRAS • Global Talent Track Private Limited (GTT) • Everonn • Centum Work Skills	• Apollo Med Skills • Medvarsity • Jaslok Hospital and Research Centre • Medanta Duke Research Institute (MDRI)
Leading Chain of Hospitals in India	**Leading Health Insurance Companies**	**State Bodies associated with Healthcare related Education**
• Apollo Hospitals • Fortis • Max Healthcare • Global Hospitals • Columbia Asia	• Aviva Life Insurance • Bajaj Allianz General Insurance Ltd • Birla Sun Life Insurance • ICICI Lombard General Insurance • Life Insurance Corporation Of India • Max New York Life Insurance • Star Health and Allied Insurance Company Limited • Tata AIG	• Ministry of Health and Family Welfare • Medical Council of India • NSDA • NSDC • Healthcare SSC

Industry Perspectives on Skill Development

Skill requirements in the sector have been analysed based on industry interactions to understand the qualitative aspects of manpower needs. Detailed industry interactions have revealed the following concerns/issues in skilling needs of the industry. [78]

- The private healthcare industry is witnessing heavy attrition among nurses due to better compensation in government hospitals and the exodus of nurses to territories like the Middle East and Singapore to seek overseas opportunities
- Training providers can offer international bridging courses in collaboration with the local VET providers.
- Partnership with hospitals is also important for any training providers given the lack of national certification for paramedical courses.
- Increase in external training costs is forcing hospitals to prefer in-house training.
- Specific training courses offered by foreign institutions to prepare Indian nurses for a career abroad are always popular, mainly because it helps young professionals migrate to a foreign country where their earning potential is multiplied many times over.

[78] *KPMG in India Analysis and Industry Discussion*

Opportunities for New Zealand

The Healthcare industry in New Zealand is supported by both public and privately funded services. Professional bodies in the field of healthcare oversee teaching and learning requirements in qualifications that relate to this sector. The strength of New Zealand healthcare training institutes lies in the areas of nursing, health, disability, and aged support, mental health and addiction support, health promotion, public health, and health sciences. A total 18 ITPs in New Zealand offer 165 courses in the healthcare stream. % Of these 33% c are at the foundation level having direct synergies with vocational training in India. Leading institutes in healthcare training in New Zealand are[79]

- Unitec Institute of Technology
- Waiariki Institute of Technology
- Waikato Institute of Technology (Wintec)
- Whitireia New Zealand
- Considering the strengths of New Zealand training institutes and the requirements of Indian industry, New Zealand TVET providers could explore opportunities to collaborate in the areas of
- Content creation for courses based on advancements in medical sciences
- Train the trainer services for healthcare education institutions in India covering biomedical science and addiction control
- Conducting bridge courses to Indian AHPs looking to pursue a global career outside India
- Corporate tie-ups with leading hospitals for training and certifications
- Provision of independent assessment and certification services to Indian VET providers to align the programme to New Zealand qualifications
- Tie up with SSCs for train the trainer, assessment and certification services

Summary of Skill Training Opportunities

Partner/Areas of Collaboration	Curriculum	Content Development	Delivery/ Train the Trainer	Infrastructure	Assessment	Certification	Further Education
Training Institutes							
Government							
Corporate							
SSC							

[79] *Education New Zealand*

Case Studies of Indian Collaborations

Medvarsity Online

Medvarsity is an initiative by Apollo -a leading Hospital Group in India that offers courses for doctors, nurses, paramedics and hospital administrative staff. The collaboration "Medvarsity" is among various foreign and Indian institutions where Medvarsity acts as an aggregator of training programmes. The collaboration in the domestic front comprises of *Apollo Hospitals Educational and Research Foundation (AHERF)* and Healthcare Operations Management offered by *NIIT Imperia and IndiaCan*, which is a Pearson -Educomp Joint Venture which looks into Diabetics and Clinical Nutrition. The aforementioned companies together take responsibility for teacher and student training, placement and other activities performed by Medvarsity. Global partners include *Royal College of General Practitioners (RCGP)*, UK that practices family & Emergency Medicine, *University of Sydney* that provides a Paediatrics Certificate and SIMTICS, which is a New Zealand-based software firm for clinical procedure simulations. These foreign institutions support the partnership in the areas of curriculum, content, assessment and certification.

SIMTICS offers e-learning modules in medical and allied health industries. SIMTICS Integrated Cognitive Simulator[80] provides modules for learning medical and clinical procedures in virtual reality through the internet. It features text, anatomy, video, and simulation in one package - synchronized by a dynamic timeline. According to Sanjiv Zutshi, CEO, Medvarsity Online Ltd, "By studying the SIMTICS modules online, at their own pace, our customers will be able to learn the steps of a procedure, which instrument to use and where to apply it, and the relevant anatomical structures. That means they will be better prepared and can concentrate on more advanced aspects when they are exposed to clinical time in a hospital .[81]

Partnership in Skill Development Value Chain

Curriculum	Content Development	Delivery/ Train the Trainer	Infrastructure	Assessment	Certification	Further Education

[80] http://www.simtics.com/
[81] http://pharmabiz.com/NewsDetails.aspx?aid=67633&sid=2

Medvarsity platform has covered 2500 Students and hosts around 5000 hours of content[82] . The content is customized to suit Indian requirements by appointing a large content team who also design assessment exams. Online training is increasingly becoming a preferred model as it enables the university to reduce capital expenditure and allows pricing of courses to be competitive with other local options. It also provides flexibility for the learners while pursuing a full time job and facilitates placement through an online job portal.

Lifesupporters Institute of Health Sciences (LIHS)

Life supporters Institute of Health Sciences (LIHS) is registered as a non-profit organisation. LIHS serves as the emergency medical training arm of an ambulance company and offers services in collaboration with foreign training providers. In this collaboration, there are several foreign partners who support only the curriculum and the content.

The Medical School of University of Cornell & Columbia, known as the New York Presbyterian Hospital is the knowledge partner for the Paramedic training programme. The American Heart Association (AHA) provides courses in Heart Saver AED and Heartsaver AED First Aid. In addition, the London Ambulance Service is a partner in developing training modules for Emergency Medical Services (EMS) courses. Finally, the ITLS Society, Alabama, USA develops a training site for an International Trauma and Life Support (ILTS) course.

Partnership in Skill Development Value Chain

Curriculum	Content Development	Delivery/ Train the Trainer	Infrastructure	Assessment	Certification	Further Education

LIHS organises the supply chain including training, assessment, certification and placement through the support of domestic partners. P. D. Hinduja National Hospital is a partner for training of Emergency Medical Service Providers, Paramedic personnel and the establishment of Emergency Medicine Emergency Medical Services in the city of Mumbai. Life Line Foundation, another partner, operates ambulance service across states. Life Line trains partners for emergency medical services courses. The third domestic partner, Narsee Monjee Institute of Management Studies (NMIMS), is a knowledge partner for the Hospital Emergency Preparedness Course. [83]

[82] www.medvarsity.com/
[83] Company Website, KPMG Analysis

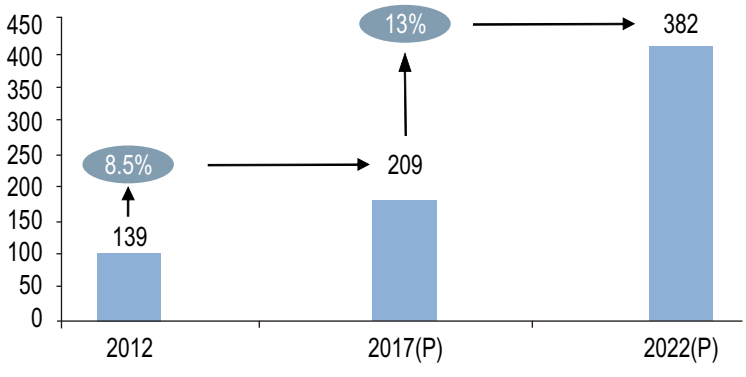
5.4. Travel, Tourism and Hospitality

Industry Overview

The Indian travel and tourism industry (including hospitality) is expected to be a USD 139 Billion market in 2012, rising to USD 382 billion[84] by 2022. The Tourism industry is expected to grow at a healthy growth rate of 8.5% CAGR from 2012 to 2017 and 13% CAGR during 2017-22[85] . India is expected to remain at the forth place in terms of annual growth in Travel & Tourism demand between 2010 and 2022, ahead of Vietnam, Thailand, Indonesia, Sri Lanka and Malaysia.

Hospitality (hotel and restaurants), transportation and travel agencies are key sub segments in the industry. Traditionally, the hospitality industry is dominated by the unorganised segment. Among the two sub segments, the hotels category is more organised in comparison to restaurants. Hotel chains like ITC, Marriot, Hyatt, Hilton, The Leela group are key players in the hospitality segment. In the restaurant category, only 10% of the sector[86] is organised which is expected to grow with the emergence of organised players in quick service restaurants like KFC, Pizzaaurent and Coffeday. In the transportation and travel categories, Jet Airways, MakeMyTrip.com, Yatra.com and Thomas & Cook occupy significant market share.

Fig 16: Indian Travel Tourism and Hospitality Industry Market Size (USD Billion)[87]



[84] *WTTC Estimates on Indian Travel and Tourism Industry, KPMG in India Analysis*
[85] *WTTC Estimates on Indian Travel and Tourism Industry, KPMG in India Analysis*
[86] *WTTC Estimates on Indian Travel and Tourism Industry, KPMG in India Analysis*
[87] *WTTC Estimates on Indian Travel and Tourism Industry, KPMG in India Analysis*

Human Resource Requirement in the Industry

The travel and tourism industry is expected to provide additional employment opportunities of 2.6 million during 2012-22 across the sub segments. The Hospitality segment contributes to the highest share of incremental manpower requirements in the industry with a potential of 2.2 million employment opportunities in the hotel segment and another 0.4 million in the restaurant segment by 2022[88]. While the contribution of the organised travel and tourism services segment is low mostly owing to the unorganised nature of the industry, significant indirect employment opportunities could be generated from the segment.

Contribution of Segments to Incremental Human Resource in Travel, Tourism and Hospitality Industry (2012-22) [89]	
F& B Services	44%
F&B Kitchen	25%
Housekeeping	30%
Front Office	~1%
Travel & Tourism	Less than 1%

Key Roles in the Hospitality Industry include:

Hotels: Food and Beverage Services, Food and Beverage Kitchen, House Keeping and Front Office

Restaurants: F&B Services (Managers, Captains, Stewards, and Waiters), F&B Kitchen (Chefs, cooks) and others

Tourism: Travel Agents, Tour Operators

Human Resource Supply Scenario in India

Education and training programmes in the sector are typically driven through industry partnerships with VET providers in India. Training curriculum is often customised to suit employer requirements while conforming to AICTE standards. There are 41 Institutes of Hotel Management (set up by Government), the Indian Institute of Tourism and Travel Management (IITTM) and five Food Craft Institutes are renowned training institutions offering formal courses in hospitality under the affiliation of National Council for Hotel Management and Catering Technology (NCHMCT) which was established in 1982 under AICTE.[90] These formal courses are offered across job roles like food and beverage services, food and beverage kitchen, housekeeping and front office. Formal courses include: Craftsmanship Course in Food and Beverage Service, Certificate Course in Hotel and Catering Management and graduate and post graduate Diplomas in Accommodation, Front Office Operations, Tourism Management and Travel Operations.

[88] *NBCC, KMPG Analysis*
[89] *NBCC, KMPG Analysis*
[90] *AICTE, NBCC*

The Ministry of Tourism supports scheme based training under the Hunar Se Rozgar initiative to provide skill development opportunities for eligible candidates in various trades across the hospitality industry. Additionally, NSDC funded training providers like IIJT, BASIX Academy, Empower, Everonn and GRAS Hospitality Services also offer non-formal certificate courses of short duration across job roles in the hospitality industry. The institutes offer specialised courses in niche sectors such as bakery and confectionary, hairdressing, bartending, etc. Private Institutes like Frankfinn, Kuoni Academy offer vocational training in travel and tourism industry.

Some of the leading training institutes in the sector include [91]

Leading Institutes in Hospitality and Tourism	Leading Vocational Training Institutes (Foundation Programmes)	Training initiatives of Corporate
• Dadar Catering College • IITTM • IHM Bangalore and others • Asan Memorial College • Institute of Advanced Management, Kolkata • Christ College • Delhi Institute of Hotel Management & Catering Technology • Franfinn Academy • Kuoni Academy	• IIJT • GRAS • Everonn • Empower • B-ABLE • TMI • Technable Solutions • Smart Edusol Services • Skill Ventures Private Limited • PRATHAM • NIIT Limited	• Oberoi Centre of Learning and Development • Welcomgroup Graduate School of Hotel Administration (WGSHA) • Future Human Development Limited • IHM Aurangabad (Taj Collaboration)
Leading Hotel Industry Players	**Leading Pan-India chains of Quick Service Restaurant**	**State Bodies related to Tourism and Hospitality Education**
• ITC Hotels • Indian Hotels Company Ltd.(The Taj Hotels Resorts & Palaces) • Oberoi Hotels(East India Hotels) • Hotel Leela Venture • Asian Hotels Ltd. • Radisson hotels & Resorts • Le Meridian Group of Hotels in India	• Domino's Pizza • KFC • Cafe Coffee Day • Subway	• Ministry of Tourism • AICTE • NSDA • Hospitality SSC • Tourism SSC • NSDC

[91] *KMPG Analysis*

Industry Perspectives on Skill Development [92]

Skill requirements in the hospitality sector have been analysed based on industry interactions to understand the qualitative aspects of manpower needs. Detailed industry interactions have revealed the following concerns/issues in the skilling requirements of the industry. [93]

- Working for international hotel brands in India or abroad are key aspirational factors for youth
- Most premium hotels select students from the good quality IHMs and private institutes after rigorous assessment
- Quality gaps in new recruits are bridged by in-house training programmes.
- When hospitality property is getting built, most of the recruitment is done in parallel and there is a strong need to train such new recruits on internal processes and culture before commencing operations.
- Front office roles do require extensive training of staff to meet customer expectations.
- Foreign collaborations are sought which help professionals to acquire international certifications that can lead to global careers.
- As the industry witnesses rapid expansion plans, sourcing of trained manpower is a challenge which can be helped by Indian VET providers who can offer services at price points industry can support.
- Foreign providers can collaborate either with internal training departments of premium hotel chains or Indian VET providers.
- Preference for candidates with full time degrees in hospitality courses than those with diploma/ certificate course

Opportunities for New Zealand

Tourism is New Zealand's second largest export industry. It directly employs 6.2% of the New Zealand workforce and indirectly employs a further 3.4%. In total, around one in 10 working New Zealanders is employed in the tourism industry; the industry improves the economies of communities around the country. The industry is worth USD 18.5 billion a year to New Zealand's economy.

[92] *KPMG Primary Analysis*
[93] *KPMG in India Analysis and industry discussions*

The 18 ITPs in New Zealand offer 235 courses in hospitality and tourism of which 51% are at the foundation level. The strength of New Zealand's hospitality and tourism industry lies in courses related to tourism management, culinary arts and business, event management, and hospitality management. There are training providers who specifically focus on setting standards, development of qualifications and arranging training for the service industry in accommodation, aviation, bars and restaurants, cafés, clubs, food services, museums, quick service restaurants, retail, tourism, travel and wholesale sectors of the service industry in New Zealand.

Some of the leading training providers in this sector include [94]

- Wellington Institute of Technology (WelTec)
- Christchurch Polytechnic Institute of Technology (CPIT)
- Queenstown Resort College
- ServiceIQ

Considering the strengths of New Zealand training institutes and requirements of Indian industry, New Zealand TVET providers could explore opportunities to collaborate in the areas of

- Collaborate with training institutes and corporations to impart knowledge on global hospitality standards and practices
- Train the trainer services for private vocational institutions
- Corporate tie-ups with hotel chains for providing end-end training services during the establishment of the properties
- Provide independent assessment and certification services to Indian VET providers to align programmes to global standards
- Provide train the trainer, assessment and certification services to SSCs

Summary of Skill Training Opportunities[95]

Partner/Areas of Collaboration	Curriculum	Content Development	Delivery/ Train the Trainer	Infrastructure	Assessment	Certification	Further Education
Training Institutes							
Government							
Corporate							
SSC							

[94] *ENZ*
[95] *KPMG in India Analysis*

Case studies of Indian Collaborations

Institute of Hotel Management Aurangabad with University of Huddersfield

The Institute of Hotel Management, Aurangabad, founded in 1993, was based on a joint agreement between the Maulana Azad Educational Trust and Taj Hotels Resorts and Palaces. Being nominated as one of eight 'Leading Hotel Schools of the World", it is one of the most sought after hotel schools in Asia[96] . In order to offer global standards of education and a distinctive competitive advantage to its students, the institute has partnered with University of Huddersfield, UK for two courses that would award a UK University degree. University of Huddersfield has over 23,000 students studying varied courses. The University has 55 collaborations with other institutes, of which 12 are global institutions. Both the courses offered through collaboration are recognised and approved by the Indian regulating agency, AICTE. However, it should be noted that although these courses lead to an award of UK University degree, it is not a UK professional accreditation. [97]

Name of course	Duration	Tuition Fee(4 years)	Strength
BA (Hons) in Hotel Management	4 years	USD 11538	100-120 per year
BA (Hons) in Culinary Arts			50-60 per year

The partnership was structured such that the responsibilities of designing the course and content delivery belongs to IHM-A, while responsibilities of validation of the degree and assessment of the course belong to the university of Huddersfield. Finally as a result, the certification is awarded by the collaboration of both institutions.

Partnership in Skill Development Value Chain

Curriculum	Content Development	Delivery/ Train the Trainer	Infrastructure	Assessment	Certification	Further Education

[96] http://www.lhw.com/
[97] Company Website and KPMG in India Analysis

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- Working closely with Central Govt., MoHRD, State Govts, Apex bodies and funding agencies
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Narayanan Ramaswamy
Head – Education Advisory

KPMG India
+91 (44) 3914 5208

email: narayananr@kpmg.com

Vilvarayanallur Madhavan
Associate Director – Education Advisory

KPMG India
+91 (44) 3914 5000

email: vmadhavan@kpmg.com

Gaurav Kumar
Associate Director – Education Advisory

KPMG India
+91 (124) 43075203

email: gauravkumar1@kpmg.com

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