



NEW ZEALAND
EDUCATION



INDIA STRATEGY

2013 - 2014



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INTRODUCTION AND OVERVIEW

India is a priority market for Education New Zealand (ENZ) and offers considerable scope for student recruitment and international business development opportunities. It is New Zealand's second largest source of international students with 11,349 Indian students in New Zealand in 2012 contributing just over NZ\$250m to the economy.

However, the complexity and scale of the Indian market makes it a challenging destination for New Zealand education institutions and companies. Not only are the business practices and culture foreign to even experienced international marketers and business development managers; the role of Government, several autonomous bodies, industry councils and private sector companies in any given initiative can be very confusing; the scale of the opportunities is often mind-boggling; the proposed "price" potential partners are willing to pay is woefully low; "consumers" are either extremely price sensitive or overly brand conscious; and quite simply things take time in India!

To be successful in India, persistence, presence and patience is required.

Education is highly valued in India and each year, some 200,000 Indian students go abroad to study. Currently New Zealand attracts only 5 per cent of this cohort. New Zealand offers a lot of what India wants: safe, high quality, reasonably priced education; study to work options and migration pathways. However, according to TNS Research only 14 per cent of potential Indian students actively consider New Zealand as a study destination.

To build, and maintain, a strong profile in a market as large as India, requires a strong commitment – both in principle, and resourcing. This can be a significant hurdle for many institutions looking to either develop or grow their business in India.

While India has one of the world's largest education systems, with more than 1.4 million schools, 650 universities, 33,000 colleges and 12,000 diploma granting institutions, the system is unable to support the sheer volume of students seeking an education and the projected growth in the young population.

Around half of India's population is less than 25 years of age. The country's working age population is projected to grow to 962 million by 2030 – making India the largest contributor to the global workforce. Educating and skilling this population is a huge opportunity (demographic dividend) and challenge. At the same time, the country is grappling with significant numbers of unemployed graduates who have formal qualifications, but aren't "work ready".

As India continues to strengthen its position in the global economy, it realises the need to develop its human capital across a whole range of sectors including many that are "sweet spots" for New Zealand such as agriculture. The oft quoted figure of 500m remains an aspirational target for the Government in terms of skilling its people.

If New Zealand has a low profile as a study destination, its profile in the education business development sphere is almost non-existent. Countries such as Germany, US, UK, and Australia, have taken "ownership" of certain sectors within the economy and established a strong presence as education partners. Some of these initiatives run on commercial models, while others are aid-funded projects or CSR programmes, and most take a long-term view of return on investment.

Overall, India is a priority relationship for New Zealand and its most developed in South Asia. An enduring foundation of friendship and common heritage underpins the relationship between the two countries.

The New Zealand Government is implementing an inter-agency **NZ Inc India Strategy** that is working towards India becoming a core trade, economic and political partner for New Zealand by 2015.

While India isn't a top 10 trading partner for New Zealand businesses, a Free Trade Agreement is currently being negotiated; Indian nationals accounted for the largest number of new skilled migrants to New Zealand in the year ending June 2013; tourism receipts from India are growing significantly; and ***in the field of education, we simply cannot ignore India.***

ENZ INDIA STRATEGY

JULY 2013 – DECEMBER 2014

New Zealand's approach to the Indian education market has been fragmented in recent years, and ENZ has an important role to play, working with the New Zealand education sector, as well as other Government agencies, most notably the Ministry of Foreign Affairs and Trade, Immigration New Zealand, New Zealand Trade and Enterprise, and Tourism New Zealand.

ENZ is committed to the twin goals of raising New Zealand's profile as a study destination in India, and increasing the number of introductions that result in new business for New Zealand institutions.

A three-pillared approach concentrating on government relations, targeted marketing initiatives, and a business development plan with a clear focus on specific sectors and New Zealand institutions with the commitment to succeed in India as well as the development of an in-depth understanding of market dynamics and opportunities, are at the heart of ENZ's strategic approach to India.

The strategy is delivered by a small New Delhi based team, skilled in diplomacy, marketing and business development, supported by ENZ's Wellington based teams and external providers as necessary. During the course of the next 6 - 12 months, ENZ is exploring the option of establishing a presence in Mumbai to provide a greater focus on the western and southern states of India.

The following is an overview of the primary activities over the 18 month period from 1 July 2013 to 31 December 2014.

MARKETING

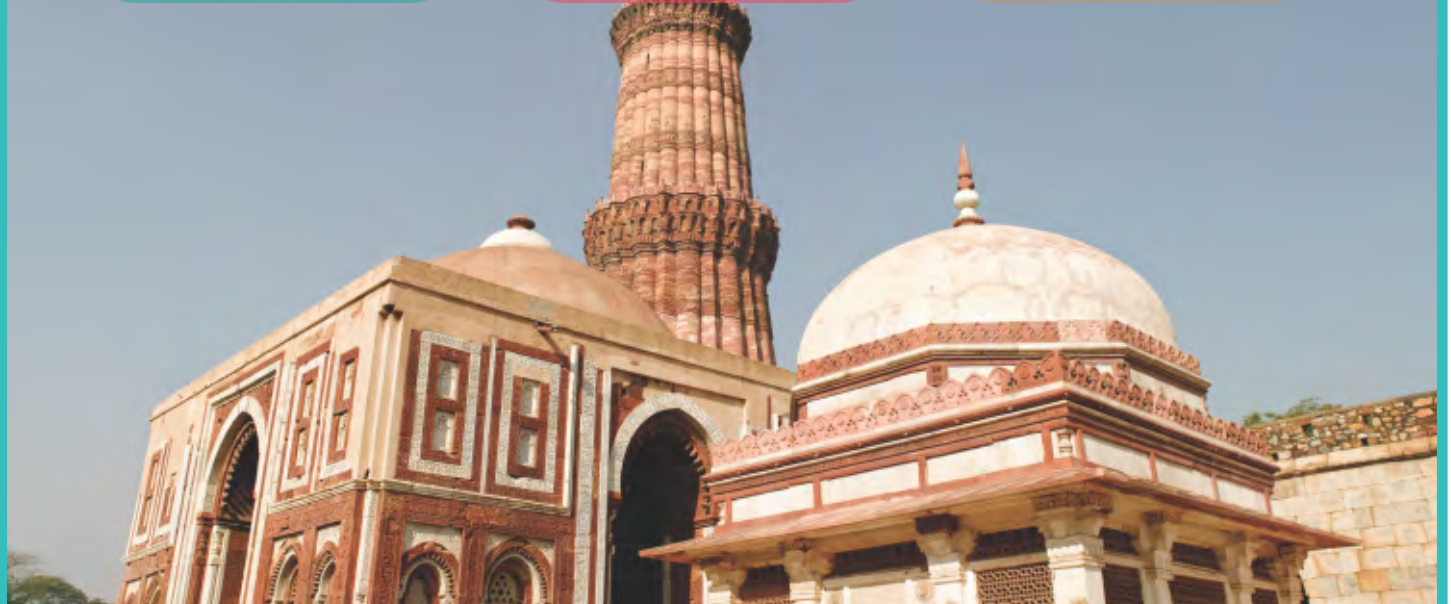
Social Listening
Events
Fairs
Public Relations
Digital
Trade
Alumni
Game Changers (Cricket)
TNS Global

GOVERNMENT RELATIONS

India New Zealand
Education Council
(INZEC)
Prime Ministers'
Education Initiative
Ministerials
Missions

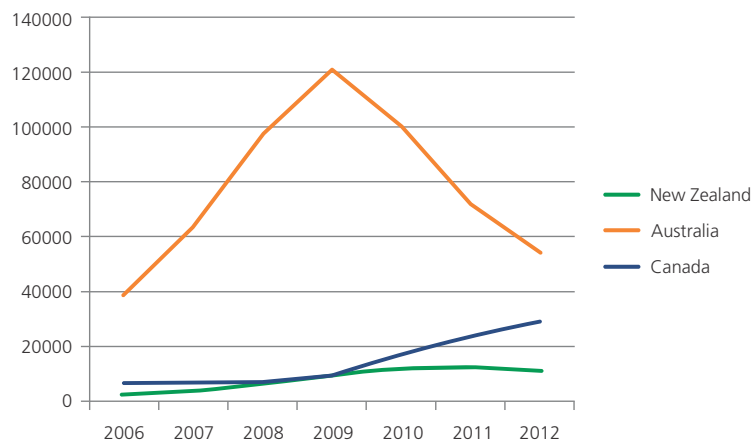
BUSINESS DEVELOPMENT

Market Intelligence
Institutional Engagement
Strategy
Collaborative Models
Events
Sector Concentration
(Agriculture; Media &
Entertainment; Healthcare;
Tourism & Hospitality)



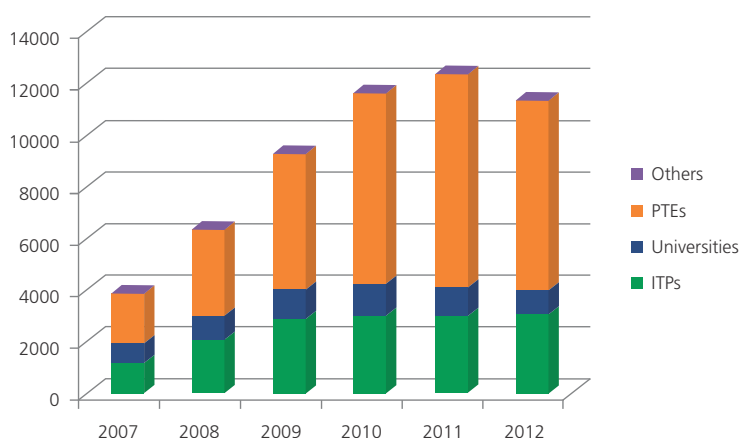
INDIA SNAPSHOT

Indian Students Abroad



The United States and UK are the leading destination countries for Indian students studying abroad.

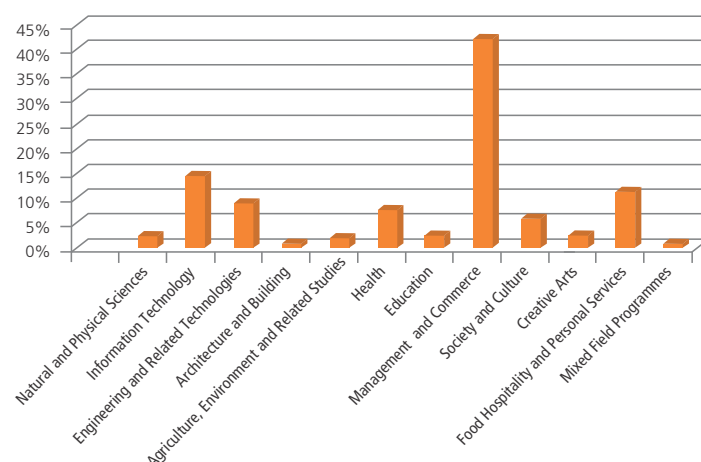
Indian Students in New Zealand 2007 – 2012



Latest Immigration New Zealand statistics (September 2013) suggest a slight increase in student visas from India (YTD) when compared to the same period last year.

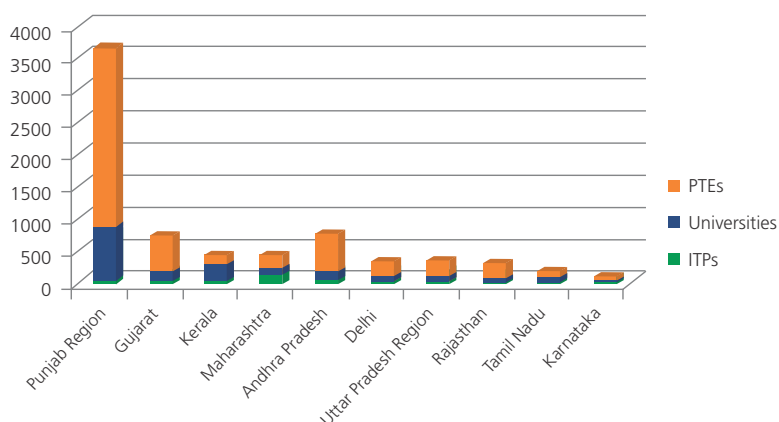
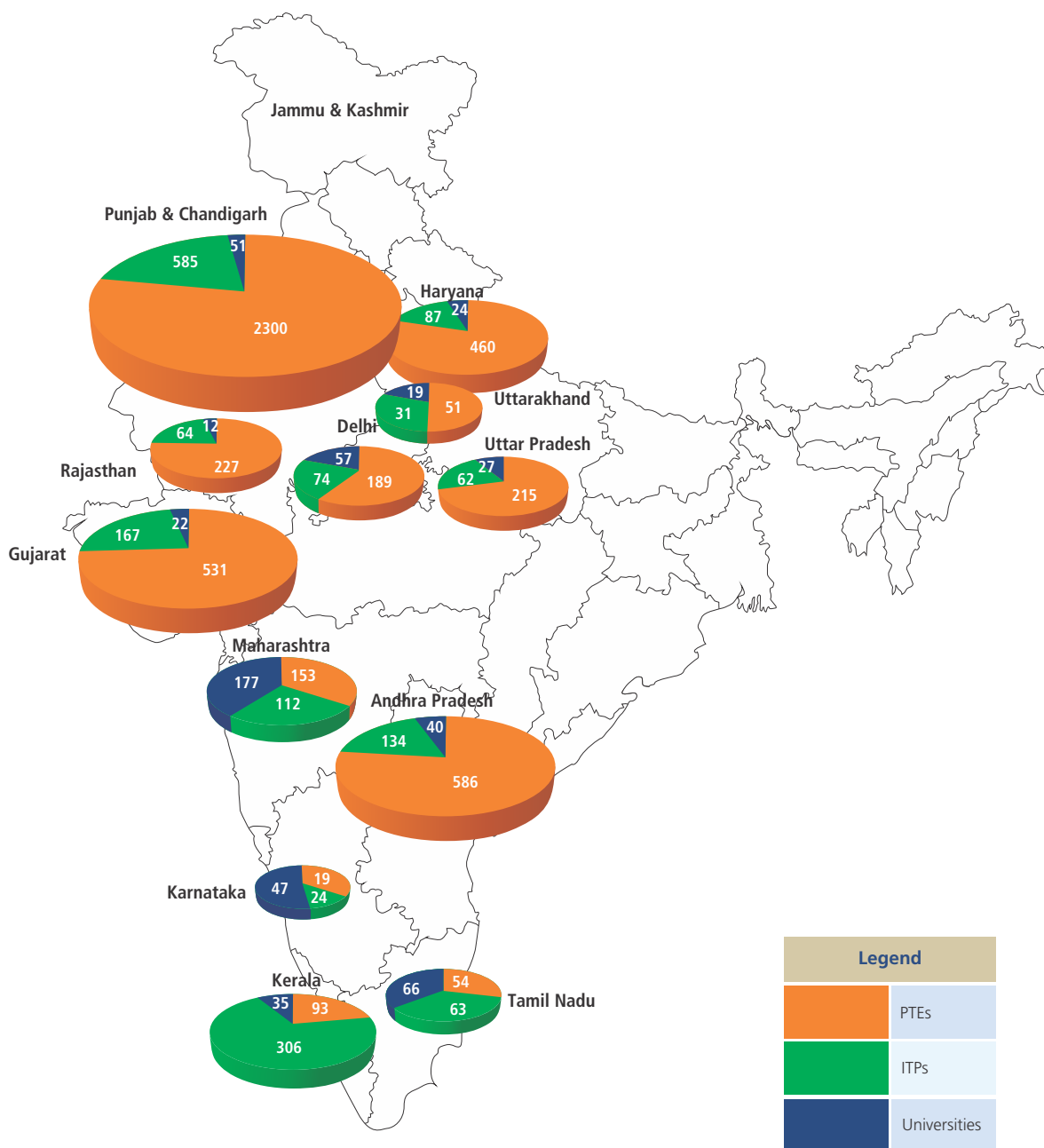
More than half of all the Indian students studying in New Zealand are based in Auckland (57%). One of the reasons for this is that more than 60% of Indian students in New Zealand study at PTEs which are predominantly Auckland based. The other key locations are: Bay of Plenty Region (11%), Taranaki Region (7%), Canterbury Region (6%), Wellington Region (5%) and Waikato Region (4%).

Proportion of Enrolments by Field of Study 2012



The subject choices for Indian students studying in New Zealand follow similar patterns to Indian student choices elsewhere in the world.

Key Source Regions for Indian Students in New Zealand 2012



The top 10 regions account for 85% of Indian students in New Zealand. The Punjab Region (including Punjab, Haryana and Chandigarh) alone accounts for 43% of students. New Zealand institutions must look at diversifying their source regions in India to protect themselves against any adverse region specific conditions. Uttar Pradesh Region on the graph refers to Uttar Pradesh and Uttarakhand.

GOVERNMENT RELATIONS

The bilateral education relationship is collegial and positive. New Zealand has developed strong relationships with key Indian government agencies, which have opened doors for partnership opportunities for the New Zealand education sector.

Continuing to strengthen and leverage the government relationship is critical to raising the profile and brand of New Zealand in the Indian market as high-level government support is an integral part of the Indian environment.

There have been several high-level visits between New Zealand and India over the last three years which have supported the ambitions of the New Zealand education sector including the July 2013 visit to New Zealand by the Indian Minister of Human Resource Development, Dr Pallam Raju.

India New Zealand Education Council

The India New Zealand Education Council (INZEC), established in October 2012, set the scene for growing bilateral collaboration in the higher education, and skills and vocational sectors. INZEC will remain the key mechanism for guiding joint activity and the distribution of a bilateral joint annual fund of NZ\$1m.

A priority of ENZ is to agree clear terms of reference and processes for the allocation of INZEC funding with Indian counterparts. ENZ will continue to work with the



Indian HRD Minister Dr Pallam Raju at a Marae in Auckland, July 2013

New Zealand India Research Institute (NZIRI) as the New Zealand representative body for the higher education stream.

Prime Ministers' Education Initiative

The Prime Ministers' Education Initiative 2011, which was the genesis of INZEC, also included two other programmes focused on uplifting New Zealand business students' appreciation of doing business in India; and supporting India's goals in the sports education arena.

ENZ has progressed dialogue with Indian counterparts on both the "Doing Business in India" and Sports Scholarships programmes and will implement both within the next year.



Indian HRD Minister Dr Pallam Raju with New Zealand Minister for Education Hekia Parata and delegation members in Wellington, July 2013

MARKETING

India is a key market for international students for most countries. While the total number of Indian students going abroad to study has fluctuated in recent times due to a range of internal and external drivers, estimates still put this at about 200,000 a year. Traditional markets such as the US and UK remain the top choices. Australia's numbers have dropped significantly in the last few years but are projected to stabilise around a new benchmark. Canada has seen the most rapid rise in terms of profile, perception and numbers. New Zealand is the fifth choice for Indian students and also faces competition from new regional entrants such as Singapore.

ENZ's marketing strategy for India is focused on increasing brand awareness and consideration of New Zealand as an education destination.

ENZ will also actively be targeting tier 2 cities for its marketing activities as relevant in the aim of diversifying regional sources of Indian students.

Social Listening

ENZ has invested in in-depth monitoring of social media to gain insights on what factors are influencing study abroad decisions and this is being used to ensure an informed ENZ media strategy.

Digital

With over 74 million people on Twitter, 62 million on

Facebook and 23 million on LinkedIn, social media is growing in importance in India. ENZ's digital strategy is focused on building New Zealand's audience and engaging in regular dialogue with them to strengthen New Zealand's profile as a study destination. An online campaign with Kiwi cricketer Stephen Fleming saw a 93% increase in Facebook likes on ENZ's India page. ENZ aims to drive an increase in visits to studyinnewzealand.com and newzealand.com.

There is an on-going series of improvements to both sites which will see improved navigation, greater focus on institutions and agent listings with the aim to send more referrals and leads to agents and institutions through the improved information and functionality of the website. A local landing page for India will be launched to ensure greater localisation of messaging. ENZ is also investing in paid activity using the outcomes of the social listening project to improve the effectiveness and efficiency of paid media spend, and leveraging of new brand assets.

Events

Traditional education fairs will continue to play a role in ENZ's marketing plan for India. Based on institutional feedback, ENZ has chosen August/September as the timing for ENZ-led New Zealand Education Fairs in metropolitan cities.

A second round of fairs between February and April will be agent-led and will enable more cities to be covered.



ENZ is targeting direct interactions with schools, colleges and universities to create opportunities for New Zealand institutions to be profiled directly and cost-effectively with large groups of target audiences.

ENZ is partnering institutional events of reputable Indian institutions and most recently partnered the prestigious IIT-Kanpur on an event which positioned New Zealand as a study destination to some 30,000 IIT students from across the country.

In addition, as a joint business development and student recruitment strategy, ENZ will look to leverage tradeshows where New Zealand can have a strong profile such as India's Aviation Tradeshow, together with other NZ Inc agencies.

Public Relations

ENZ's PR programme will focus on proactive media relations (including media famils), event leveraging, engagement of influencers, and issues management.

Indian students are strongly motivated by employment pathways and influenced by success stories of other Indians. Institutions are encouraged to share information on alumni profiles, new programmes, research highlights and India related activities on campus such as Diwali celebrations as these can all be leveraged positively in India.

ENZ will also be working with opinion leaders to leverage their huge following to promote New Zealand's education strengths.

ENZ has engaged a PR agency in India to support this work.

Trade

Agents play a very important role in influencing and supporting student decisions in India. Data shows that more than 800 agents played a role in Indian students studying in New Zealand in 2012. ENZ's recently launched e-learning tool for agents is geared to ensuring that all agents interested in "selling" New Zealand as a study destination do so armed with accurate information and supported with appropriate marketing materials.

ENZ is focused on working with quality agents committed to the New Zealand market and focused on

mutually beneficial outcomes for New Zealand institutions and themselves. ENZ will be working closely with these specialist agents on joint marketing events and promotions in India.

Alumni

More than any other source country, India probably has the largest number of New Zealand alumni resident in New Zealand! Alumni can play a strong role in advocating for New Zealand as a preferred student destination. The first step to this process is the development of a New Zealand Educated – India Alumni database.

Game Changers

India is rarely talked about without mention of cricket and Bollywood somewhere in the conversation. Not surprisingly these two institutions of Indian life are the focus of joint promotional activity across New Zealand Government agencies in India as part of the NZ Inc India Strategy.

India has a long standing relationship with New Zealand in the field of cricket, especially with the past association of John Wright as the coach of the Indian international cricket team and currently with Stephen Fleming as the coach for IPL team Chennai Super Kings.

Cricket literally helps open doors in India and ENZ is working on a marketing plan to leverage the Indian Cricket Team's tour of New Zealand in early 2014 as well as working with other NZ Inc agencies on leveraging the Cricket World Cup 2015.



Stephen Fleming at an ENZ event in India

BUSINESS DEVELOPMENT

While the provision of New Zealand education services into India is currently small, the country offers considerable opportunities for business development.

India currently stands at a historical juncture, with the potential to reap rich economic benefits in the next few decades owing to population growth coupled with an unprecedented demographic transition.

India's working age population is expected to increase by 346 million in the period 2006 to 2025, making India one of the youngest nations in the world and presenting an immense opportunity to skill, educate and empower these new entrants to the workforce.

ENZ appreciates that the sheer scale of opportunities, the complexities of the market, and the long-term investment required before returns can be seen, don't render India as a top priority for many New Zealand institutions.

As such, ENZ sees one of its key roles being to help demystify the market and establish useful connections for New Zealand institutions.



Market Intelligence

ENZ staff routinely undertake market research and analysis in areas of primary interest for New Zealand institutions. Research reports currently underway are focused on a scoping study on the agriculture sector; MNCs and their training needs; and sources of funding for education projects in India.

In addition, ENZ has an ongoing programme of detailed market research commissioned from third party providers which provide a more intensive and detailed examination of specific market issues and opportunities. Recent reports include:

- Education New Zealand: India Market Research & Strategy Report by Ernst & Young (December 2012)
- India Market Research: Student Perception and Attraction across India by Neilson (January 2013)

- Opportunities in India New Zealand - Skills Partnership by KPMG (September 2013)

All reports are available from ENZ.

Institutional Engagement Strategy

As part of ENZ's goal to help New Zealand education institutions and companies grow their international business, ENZ is working intensively with individual institutions that are committed to the India market.

ENZ's engagement strategy for institutions will include the creation of individual institution engagement plans which clearly capture an institution's objectives for the India market; support with market entry/growth strategy development and implementation; market research; competitor analysis; and partner and/or opportunity identification. Where ENZ does not have expertise internally, third party providers will be referred to assist as required.

Collaborative Models

Given the scale, complexity and risk profile of the Indian market, ENZ is also working on collaborative market strategies for groups of New Zealand institutions. As an example of this activity, ENZ has partially funded the establishment of a New Zealand ITP Consortium focused on harnessing opportunities in the Indian market.

Missions, trade shows and other events

ENZ sees a lot of benefit for New Zealand being represented at key events in India which help position New Zealand capability in education broadly and in specific sectors and/or the skills development sphere. ENZ was the country partner for the 6th FICCI Global Skills Summit in New Delhi in September 2013. The event provided an excellent platform to showcase New Zealand as a credible player in the skills domain and demonstrate individual institutional capabilities.

In addition to industry body events, ENZ will be targeting sector specific trade shows to directly reach key contacts at the industry level.



New Zealand at the FICCI Global Skills Summit in New Delhi, September 2013



Sector Concentration

While ENZ undertakes customised work across all sectors for New Zealand institutions, it has selected four broad sector groups in which to concentrate its market development activities.

The selection was done on the basis of sectors identified by India's National Skills Development Corporation (NSDC) as vital to economic development and urgently requiring skills training mapped against New Zealand's expertise (real and perceived).

A second layer of filtering was based on the following parameters:

- *Demand for training:* Estimated based on the incremental increase in skilled human resource requirement for the sector
- *Value attached to training:* Estimated on present entry level salaries for skilled workers in the sector and youth preferences for employment in the sector
- *Government thrust:* Impetus from the Indian Government towards training in the sector
- *New Zealand capability fit:* New Zealand's expertise in the sector

Based on this analysis, ENZ will be focusing its pro-active market development activities in the following sectors: Agriculture (including food processing and dairy); Media and Entertainment; Healthcare; Travel, Tourism and Hospitality.

FOCUS AREAS	BUSINESS DEVELOPMENT OPPORTUNITIES					
	Unemployed Graduates	Government Training	Corporate Training	Twinning Programs	CSR	Others
Agriculture	✓	✓	✓		✓	
Healthcare	✓	✓	✓	✓	✓	✓
Media & Entertainment	✓		✓	✓		✓
Tourism & Hospitality			✓	✓		

SECTOR STRATEGIES



Photo courtesy: Mike Watkins Photography

Indian skills delegation at Taratahi Agricultural Training Centre in April 2013

Agriculture

Agriculture and allied activities are the predominant occupation in India with almost 50% of the workforce employed in this sector.

Agriculture today contributes 15-20% of the GDP and plays a significant role in the socio-economic fabric of India.

The sector is expected to grow 3.5% in 2013-14. Key job segments that need to be trained include farmers, technicians, and support staff.

There are several good reasons for venturing into this sector. Agriculture has been designated as a priority sector by the Indian Government and the "Green Revolution" and "White Revolution" have been revived for enhancing productivity in food grains and milk respectively.

There is increasing investment by established corporates in agriculture including the creation of organized, mechanized farms. Several multilateral and aid agencies have apportioned significant funds for agriculture and allied activities and the sector is also the focus of mandatory CSR activities.

Although India is one of the largest producers of agricultural commodities globally, it lags behind the rest of the world in terms of productivity. The most developed and widespread sub-sectors of agriculture in India are Food Crop Cultivation and Dairy.

NSDC estimates the skills requirement for agriculture at 5.3 million in 2022 with 2.3 million for dairy. While agriculture practiced in India is largely subsistence, dairy is relatively more organized with the presence of quasi-government entities similar to producer companies.

India also has a reasonably well developed supply chain for milk and therefore requirement of highly skilled professionals in dairy is likely to be higher than agriculture.

New Zealand already has a strong brand where agriculture is concerned and is well placed to offer a range of solutions to meet India's requirements.

Some of the specific areas that ENZ will be targeting include:

- Government training: Agriculture is a state as well as Central subject in the Indian constitution and employs a sizeable number of government employees. Opportunities exist for training government officials in areas such as ethics, governance, management, strategy and planning.
- Unemployed graduates: Unemployment and underemployment is rampant in agriculture in India. Retraining the unemployed labour force is a significant opportunity.
- Corporate training: The dairy sector in India is fairly organized and has a number of quasi-government entities (operated similar to private company but owned indirectly by the government). Train the trainer, skills-upgrades and higher management training are some of the relevant solutions for this segment.
- Twinning arrangements in agri-business: India has a number of well established, prestigious institutions offering certifications in agri-business. Twinning arrangements with such institutions is another focus area for ENZ. Several Indian institutions, including parent body Indian Council for Agricultural Research, have expressed their willingness to tie-up with global partners, including New Zealand.
- CSR led initiatives

Healthcare

The healthcare sector in India was valued at NZ\$66b in 2012. The healthcare delivery segment is by far the most important sub-sector contributing almost 95% of the total market.

The sector is expected to grow by 3% and has a skilled manpower requirement of 12 million by 2022.

Key job segments that need to be trained include nurses, support staff and technicians.

The increase in Indian Government efforts to better healthcare facilities and eradicate diseases will provide impetus to the sector. India also has a strong pharmaceuticals manufacturing industry which is expected to continue to perform well.

New Zealand has positioned itself well in the niche medical devices category and therefore is recognised as



among the most innovative countries in healthcare delivery.

Some of the areas that ENZ will target include:

- **Government training:** The Indian Government is fairly active in the healthcare space with both Central and State governments enacting a number of provisions and schemes. Training employees in the government healthcare ecosystem represents an impressive opportunity.
- **Corporate training:** The healthcare delivery sector as well as the insurance sector has a number of organized players that can be offered customized training programmes in healthcare.
- **Twinning:** Skilled nurses, support staff and technicians have been identified as the most significant opportunity in healthcare (contributing to 75% of human resource requirement in the healthcare sector alone).

Media and Entertainment (M&E)

The media and entertainment sector is expected to grow by 13% and has a skilled manpower requirement of 11.7 million by 2022. Key job segments that need to be trained include high and medium skilled workers in

film and television, fine arts artists and technicians in animation.

Mandatory digitization of television, increasing penetration of satellite television and strong government push are leading growth in the sector. India already has a well-developed animation and VFX industry which is expected to tap a large global demand for special effects.

New Zealand has a strong reputation in the entertainment circuit in India with some of the pioneering work that New Zealand studios have done in the fields of animation and visual effects.

Some of the areas that ENZ will target for this sector include:

- **Corporate training:** The scope of such training would include employees of major organized media companies operating in the sector. The thrust of training would be on skill up-gradation.
- **Entrepreneurship development:** The M&E Skills Council actively encourages new ventures in the sector. Training young entrepreneurs can be another source of opportunity.
- **High end technical training:** India lacks high end VFX skills and New Zealand's world class expertise presents a good fit.



- Twinning arrangements: A number of private (and some government) institutions certify in mass communication, editing, direction and acting. Twinning arrangements with well-established Indian institutions can be explored.
- CSR led solutions

Travel, Tourism & Hospitality

This sector is projected to grow by 13% in the period 2017 to 2022 and has a skilled manpower requirement of 7.1 million by 2022. Key job segments that need to be trained include Food & Beverage (F&B) Services and F&B Kitchen.

Increasing income (and discretionary spending) of the middle class and government efforts such as the “Incredible India” and “Atithi Devo Bhawah” (Guest is God) are expected to spur growth in the travel, tourism and hospitality sector.

Some of the specific areas that ENZ is targeting include:

- Corporate training: The Indian travel, tourism and hospitality industry is fairly organised with the presence of large multinational and national players. There is significant demand in the industry for

trained staff and currently the major chains have tied up with TVET providers to plug the gap. An opportunity exists to play in this space as industry players would prefer to have staff with world class, international standard skills in hospitality.

The same is true for travel albeit the extent of formalization is lower than hospitality (according to NSDC, only 10% of the travel industry is in the organized sector).

- Twinning: People in India aspire to live and work abroad. This motivation is especially strong in the hospitality sector where graduates often want to work for multinational companies. Twinning degrees that offer students the opportunity to gain international work experience during the course of their study will be an attractive proposition in India.

Other Niche Opportunities

While ENZ has designated the above four sectors as priority focus areas, other niche opportunities exist for New Zealand in the areas of indigenous education, IT, sports, vocational training in schools, and distance learning.

KEY DATES

2013

July 8 - 9	Indian HRD Ministerial Mission to NZ
July 9	2nd INZEC Meeting, Wellington
August 31	ENZ Education Fair, Bangalore
September 1	ENZ Education Fair, Chennai
September 4 - 6	FICCI Global Skills Summit, New Delhi
September 7	ENZ Education Fair, New Delhi
September 8	ENZ Education Fair, Chennai
September 11	ENZ Presentation at Woodstock School, Mussoorie
September 30	Skilling India for the Next Decade (AICTE/MHRD event), New Delhi
October 23	FICCI-SIT MOU Signing, New Delhi
October 23 - 24	TURF/ Global Sports Summit & India Sports Awards, New Delhi
October 24	ENZ Presentation at IIT Kanpur
November 4 - 7	World Agriculture Forum, Hyderabad
November 6 - 7	FICCI Food 360, Hyderabad
November 7 - 8	ENZ International Education Conference, Christchurch
November 12 - 14	FICCI Higher Education Summit, New Delhi
November 19	CII National Conference on Women Leadership, New Delhi
November 22 - 25	Agro Technology & Business Fair, Chandigarh
November 28 - 29	NZIRI Conference with University of Hyderabad, Hyderabad
December 5 - 6	CII Training the Trainer – A New Exposure, Mumbai
December 5 - 7	CII Tourism Fest, Chandigarh
December 12 - 14	Dairy Industry Conference, Chennai
December 14	2nd India New Zealand Business Forum (University of Waikato-led), Ahmedabad

2014

January 10 - 12	ET Ace Tech, Ahmedabad
January 23 - 24	Food & Grocery Forum India, Mumbai
January 29 - 31	SATTE, New Delhi
February	Agent Fair (OES Consultants), Bangalore
February 3 - 4	SATTE, Mumbai
February 6 - 9	Auto Expo, New Delhi
February 7 - 9	ET Ace Tech, Kolkata
February 12 - 14	NASSCOM India Leadership Summit, Mumbai
February 27 - March 4	Mumbai International Boat Show, Mumbai
February 28 - March 2	ET Ace Tech, Chennai
March 10 - 14	Aahar, New Delhi
March 12 - 14	FICCI Frames, Mumbai
March 12 - 16	India Aviation 2014, Hyderabad
March 14 - 16	Medical Fair India 2014, Mumbai
April	Agent Fair (NZ Gateway), Ahmedabad
April	NZSA Agents Fair, Chandigarh
April	Agent Fair (Global Reach), Kolkata
August 23	ENZ Education Fair, Mumbai
August 24	ENZ Education Fair, Chennai
August 30	ENZ Education Fair, New Delhi

*The calendar gets updated on a weekly basis. Please contact ENZ India for most updated version.



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