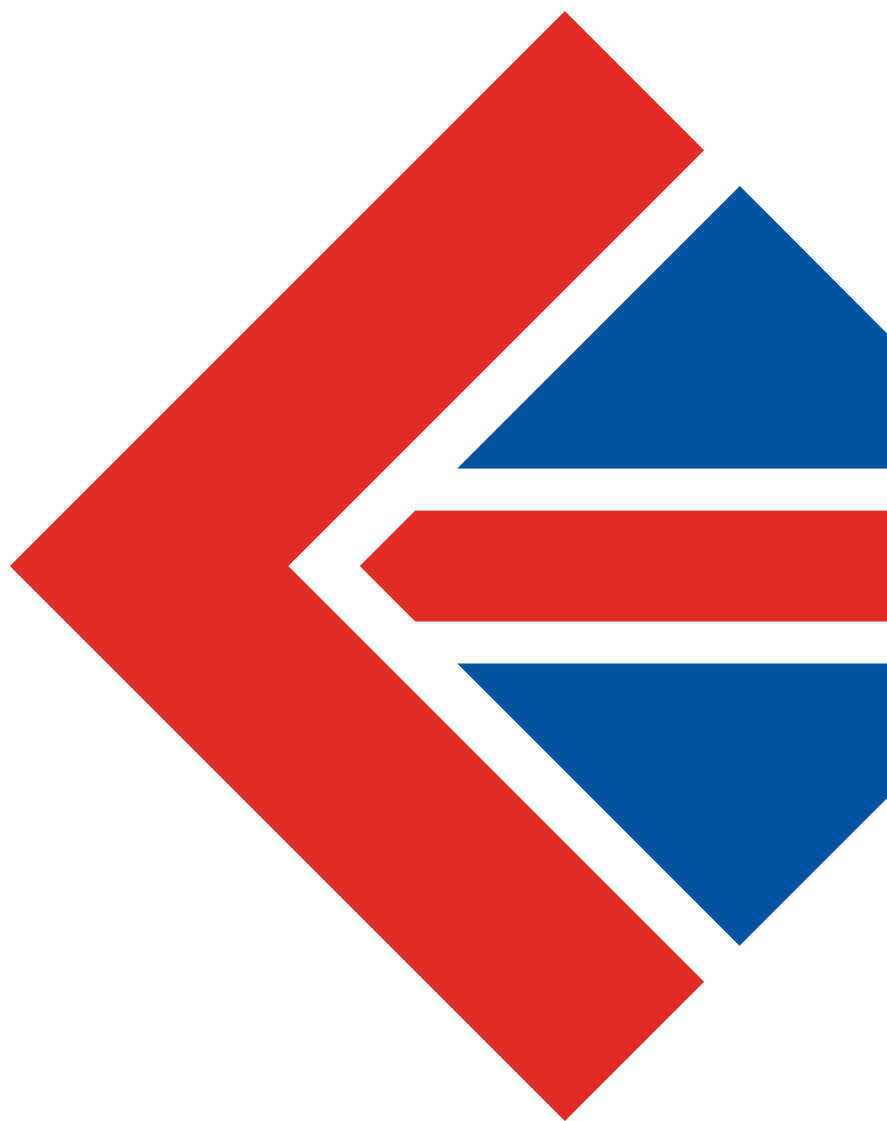


ENGLISH UK SCOPING VISIT TO INDIA

12 - 17 February 2010



Executive Summary

India accounts for approximately one-sixth of the world's population and is expected to overtake China and become the most populated country in the world by 2030. Although it has achieved impressive growth in recent years, wealth and prosperity have not reached everyone. About half of the population still live below the poverty line and approximately 40 percent are illiterate, particularly in rural areas. With 18 officially recognised languages and over 2,000 different ethnic groups, the country is also extremely diverse and practically every state speaks a different local language.

Within this complexity sits the English language. Traditionally considered an elitist language, it is also used as a national 'lingua franca'. All tertiary education across India is taught in English, it is used in government, and is essential for conducting business between states and internationally. English is also important socially as it is still viewed as a sign of status. The language is therefore seen as a 'must have' for anyone who wants to succeed in life, and those who do not have good English skills usually won't admit it for fear of being looked down upon.

Currently about 15 percent of the population speaks and understands English well, and another 30 percent speaks basic English at about A2-B1 level. However the country is being confronted with a massive language skills gap as demand for competent English speakers, particularly in the IT and engineering services sectors, continues to outstrip supply.

The Indian government has been quick to observe the importance of English for the country's continued economic expansion, and has embarked on a programme to make English universal. The language is now taught from grade one at all government-funded schools, and even subjects such as mathematics are taught in English at some schools. A major shift in the importance of English is therefore underway, but with over 250 million students in the school system and not enough qualified English teachers, increasing access to English language training for everyone will be a significant challenge, and may remain so for many years to come.

Private sector investment will therefore be essential in achieving this goal. The Foreign Education Providers Bill, which will open up the market to wholly foreign-owned investment in education and give government recognition to foreign degree courses taught in India, should help stimulate foreign investment in education. It is expected the Bill will be passed in the next six to 12 months. In the meantime, foreign providers are still able to set up educational institutions in partnership with local companies, and there are considerable opportunities for those who are interested in doing this.

Opportunities for English UK members

ELT providers could consider developing partnerships with Indian providers for direct teaching in-country, curriculum development and teacher training. The large numbers of existing private institutions would provide the greatest opportunity for members. These providers are keen to work with overseas partners in order to differentiate themselves in the highly competitive private education sector by improving the quality of their courses and adding international recognition and prestige. Government-funded schools also provide partnership opportunities, as the government strives to increase the quality of English language learning across the board. Opportunities also exist at the university level, as Indian institutions struggle to provide support for increasing numbers of international students from non-English speaking countries, and to improve the English skills of Indian students entering university who studied their secondary education in a non-English medium school.

While there is a high demand for English language training in-country, the unaffordable cost of studying in the UK for most Indians will be a major obstacle for members looking to recruit students to the UK for ELT courses. Areas where opportunities do exist include pre-sessional English courses, high-level English for Specific Purposes and Business English courses, and Young Learner Programmes for children of the very wealthy. All these opportunities are niche areas, however, as those who are able to afford to study in the UK are usually already proficient speakers of English, but may be looking to gain specialist language qualifications or prepare for further academic study or professional careers.

In contrast, UK universities and colleges will find significant opportunities for recruiting Indian students to the UK for higher education. Those who offer postgraduate qualifications will be at an advantage as

these courses are most in demand, however Indians are very open to alternative (and affordable) higher education routes, and colleges offering pathway courses or recognised degree programmes in partnership with universities will also see significant opportunities. Establishing partnerships with local higher education providers to develop 2+1 programmes or similar, where only part of the course is undertaken overseas, is another area with considerable potential.

Corporate training providers will also see opportunities in the market. Given the focus on technical subjects such as IT and engineering at Indian universities, the majority of graduates lack the business and soft skills needed for employment. Most companies provide soft skills training for new recruits, particularly in the IT, finance, engineering and hospitality sectors. Topics in high demand include presentation skills, leadership and management, business English, customer service, and cultural awareness. UK providers could set up a corporate training company in partnership with a local provider, or simply work with local training providers to offer high-quality corporate training materials and programmes to train trainers. Opportunities for recruitment of students to the UK are limited, but short-term exposure courses for high-level executives that focus on improving communication skills and cultural understanding would be popular.

Anyone considering marketing their school in India should develop their marketing strategy carefully. It is recommended that members position themselves as either premium suppliers or volume suppliers, but not somewhere in between, as Indian consumers have difficulty discerning quality and will not be willing to pay a premium unless a school has a strong USP or brand name. Recommendations from friends and family are extremely important to Indians when deciding where to study, so providing good customer service to existing students is also vital.

If setting up a school locally, members should consider modifying their curriculum to ensure it is suitable for the Indian market. Courses shouldn't be described solely as 'English courses', as most Indians believe they already know English, or if they don't, will not want to study a purely English course due to the loss of status this would afford. The location of any investment is also extremely important. As most major cities are very competitive and there are many schools for students to choose from, second and third tier cities where schools are in short supply may afford better opportunities for members.

Meetings

Friday, 12 February 2010 - Chennai

Meeting with TK Arunachalam (Arun), Cambridge ESOL Development Manager, India

Cambridge ESOL has been in the Indian market for four years. They administer about 250,000 IELTS tests a year, which is currently their most popular examination, and each test costs about £8. They work with public and private schools, as well as private English language schools for FCE, PET and KET, where students take a Cambridge exam at the end of their course. They also partner with industry to offer their law, engineering and business tests.

Arun believes there is significant growth potential in the examination market in India, particularly due to the changes in visa laws requiring students to prove their language ability to B1 level. Every year, there are about 100,000 students preparing to undertake studies overseas, and these students are willing to pay a premium for an exam preparation course at a quality school. If UK providers were willing to invest in the Indian market, he would welcome linkages with them to provide preparation courses for Cambridge ESOL exams. Another option would be for members to partner with a locally-owned English language school. This may be a better option, at least in the short-term until the Foreign Education Provider's Bill is passed, because at present, all education in India must be not-for-profit and there are difficulties in repatriating funds overseas. By working with a local provider, members would be able to get around this by charging the local provider for use of their curriculum, etc.

Another sector where Arun sees opportunities is at the university level, where the government has relinquished considerable control. Universities are looking to tie up with foreign providers for curriculum development, learning resources, teacher training and providing assistance with English language instruction on campus. All 470 universities in India teach their degree courses in English, but many do not have English language departments to help those who are struggling. The rise in the number of international students from non-English speaking countries is also fuelling demand. At one university in Pune, for example, there are over 80,000 international students, primarily from Africa, the Middle East, Eastern Europe and Asia. English UK members could partner with these universities to offer English language training to their students or charge a fee for use of their curriculum.

Arun also sees opportunities in the teacher training market. Although the British Council is already heavily involved in this, Cambridge ESOL receive a lot of requests, particularly from state and central government schools that have decided to teach in the English medium. This is not something that Cambridge ESOL does, however Arun would be happy to pass these opportunities on to UK language schools operating in India. Only the super rich are able to afford prices that lessons with native teachers attract, so providing good training for Indian English teachers is very important and seen as a priority by the government.

There is also demand for English courses that focus on oral communication and soft skills, which are tailored to specific job types. These courses would primarily be aimed at university students who are about to graduate and realise that while they may be technically competent in their field, they need to improve their English to get a job. Arun sees particular opportunities for UK language schools to provide tailored programmes for IT, engineering, law and service sector (tourism and retail) graduates. However he stresses that if these courses were offered at a private language school, they would need to be affordable (students typically pay the equivalent of £1 a class for English lessons) and profitability could only be achieved through having a lot of classes and students. An alternative option would be to partner with a university to offer these courses on campus to their students.

In terms of the demand for studying English courses abroad, Arun believes the opportunities are limited to those members who provide foundation courses or pre-sessional English courses. This is because most Indian parents believe their children already speak English well enough and are not willing to pay to send them overseas just for English. In some cases, they are even unwilling to pay for English courses in India, as they believe that courses that improve IT or other skills would be more advantageous.

Having said that, wealthy parents with young children would be willing to send their children overseas for short summer programmes that primarily focus on English communication skills. Arun sees potential in

the 10-16 year old age group for courses held from April to June. He advises English UK members to tie-up with the very exclusive private schools in India attended by children of the very rich. These children are already studying in the English medium, however their parents are always trying to give them an advantage over others and would be more than willing to pay for a programme that not only let their child improve their English communication skills, but allowed them to experience a different culture, make friends from other countries and experience other activities and excursions. Arun recommends stressing the 'cultural experience' factor when promoting these courses to schools and parents, due to the perception among many Indians that courses that focus on English alone do not increase career prospects.

Many private schools in India would be keen to partner with English UK members for these types of summer programmes, or more generally for curriculum support or teacher training, to give them a unique selling point, as the private school market is very competitive and parents are always looking for ways to differentiate between schools. Exclusive private schools are located in most major cities in India, and there are private boarding schools in more rural areas. In total, there are about 300 schools teaching British GCSEs and A-levels and a further 200 teaching the International Baccalaureate, and these would be schools that members should target. Typically fees for these schools are around £6,000 per year.

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Meeting with Nirupa Fernandez, Head of English & Exams, British Council, Chennai

The British Council has been operating in India since 1948. They have offices in Chennai, Mumbai, Kolkata and New Delhi as well as stand-alone libraries in Bangalore, Hyderabad, Pune, Ahmedabad and Chandigarh.

The British Council engages with the Indian government through a number of educational initiatives including Project English, which was launched in 2007 with the goal to train 3,000 master trainers of English across 28 states, eventually reaching 750,000 teachers over five years.

Nirupa heads up the Project English team at the British Council, which works in three main areas:

1. State government partnerships

The British Council is actively developing partnerships with policy makers and assisting them with curriculum reform by developing course materials and providing innovative ELT resources. They are also training English teachers who work in state schools to improve the levels of language teaching in India.

2. Corporate partnerships

Through this strain of Project English, the British Council is working on consultancy projects with corporate organisations in the IT and ITES sector to improve employability. Typical areas of work include trainer training, intercultural communication training, voice training and accent neutralisation, recruitment and assessment, and online e-learning. Demand for this kind of training increased significantly following the call centre boom.

3. Teaching centres

The British Council recently established teaching centres in Delhi and Chennai. They teach a range of English courses including general English, IELTS preparation, business English, teacher training, spoken English and young learner courses, for all levels of language ability. The courses are tailored to the needs of customers in each region. In Delhi, native English speaker teachers are used and higher tuition prices are charged. In Chennai, Indian teachers are used as the market is more price sensitive.

In terms of opportunities for English UK members in the Indian market, Nirupa believes there are many private English language schools in India who are looking to work with UK schools to develop higher quality programmes and increase the skills of their teachers. At present, there is no quality assurance scheme for private providers and there are schools that employ unqualified teachers and charge minimal fees. Many of the reputable schools are looking to differentiate themselves from these providers by partnering with UK schools for recognition of their courses.

Nirupa also sees opportunities for English UK members to get involved in teacher training. English is now taught from grade one at all schools, but the quality of teachers is poor. Many have little training and most have only B1 level English ability themselves. Due to the low salaries that teachers earn, many are also unwilling to spend time coming up with new or innovative ways to teach, and prefer to use a 'lecture' style with limited interaction. The British Council acts as an external consultant to schools and universities looking for teacher training and provides information about tenders on its website. Nirupa recommends interested schools check the British Council website frequently for opportunities in the market.

Another area where she sees potential for English UK members would be in the field of corporate training. In particular, there is increasing demand for high-quality corporate training materials and programmes to train trainers. Setting up a corporate training company that provides courses in soft skills like customer service, etiquette, cultural awareness etc. would be another possibility.

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Meeting with Nic Snowden, Entry Clearance Manager, UK Border Agency, Chennai

The visa office in Delhi is the head of the UK's visa operations in the Indian subcontinent. The Chennai visa office covers applications made in Sri Lanka, Kochin, Bangalore, Hyderabad and Kerala.

In 2009, 42,800 Tier 4 visas and 11,100 pre-PBS student visas were issued to Indian nationals. 3,050 Student Visitor Visas were also issued during the period. Nic explained that since the introduction of Tier 4, there has been a dramatic increase in student visa applications across India, and he believes it is a more than 50 percent increase year-on-year. The number of applicants wanting to study purely English courses, however, remains fairly low. Most applications will be for pre-sessional English followed by an academic course, either at a university or college. But Nic mentioned that the number of applications for English courses from other parts of India may be higher, as the languages spoken in the southern states that the Chennai office covers are minority languages, and hence most people in this region already have a good command of English.

The refusal rate for Tier 4 visas currently stands at about 20 percent. The biggest reasons for refusals are fake documents and the submission of documents that do not comply with the guidelines. Nic admits that it is very easy to buy fake documents in India and he has a team of forgery specialists who test documents and call awarding bodies to check their authenticity. He believes this is the main thing that members should be cautious of when recruiting students from India.

Members should also be cautious when deciding to work with new agents. There are many agents across India who will guarantee they can send high numbers of students, but these students may not be quality students. The UKBA is currently reviewing its Highly Trusted Agent scheme in India and what benefits it will give to trusted partners. Recommended changes will be implemented in the next few months and announced on the Agency's website.

Applicants from the Indian subcontinent* given limited leave to enter the United Kingdom whose main purpose is to study, 2004 – 2009

	2004	2005	2006	2007	2008	2009
Visas granted	31,210	29,425	35,340	36,460	38,630	77,810**
Dependent visas granted	2,775	3,810	4,965	4,455	4,320	5,655

*Data includes Bangladesh and Sri Lanka

** Figure includes 16,010 pre-Tier 4 student visas

[Source: Control of Immigration, Statistics United Kingdom 2009, Statistical Summary \(main data tables and supplementary data tables\)](#)

www.ukba.homeoffice.gov.uk

Monday, 15 February 2010 - Delhi

Meeting with Mr Bajwa & Mr Koul, Hero Mindmine Institute Limited

Hero Mindmine Institute Limited (HMIL) was established in 2000, and provides training and development services to multinational corporations, Indian Blue Chip companies and government organisations. Its services include corporate training, BPO training, career training, employability enhancement, employability testing and staffing solutions. It also provides programmes in leadership and management, people skills, sales and customer service skills.

HMIL conducts training courses at client premises and at its learning centre in Gurgaon, Delhi. About 36,000 people train with them each year, and they have trained over 300,000 people to date. About 70 percent of those who study with them have already graduated college or university and are working or looking for work. About 40 percent are being funded by their company.

Mr Bajwa stated that the market for corporate training in India was growing rapidly due to the growth in jobs in the IT, ITES and engineering service sectors, and that companies are continuing to spend huge amounts of money every year on education and training for their employees. They have seen demand for their training courses increase every year since the company was established.

Mr Bajwa believes that the key to success in the Indian market is results, and students won't pay a premium for a course simply because a training company is from the UK or the USA, for example, but will pay a premium if they know the course will lead to a job. Mr Bajwa also believes that any course targeting Indian students should not be described solely as an 'English course', as most Indians believe they already know English and don't need to improve. It is also considered embarrassing to have to admit to taking English classes, as anyone who wants to be successful in life is expected to already speak good English.

Both Mr Bajwa and Mr Koul see potential opportunities in India for English UK members wanting to set up a training company. There is also potential to recruit students to study short-term exposure courses in the UK that focus on improving English communication skills, soft skills and cultural understanding, however these courses would only find a market with the upper classes who were rich enough to afford them.

Other areas they see as having significant potential include assistance with curriculum development for all levels, teacher training, and in particular, tie-ups with local providers for content creation, including for TV, online and CD-ROM English language learning resources. These methods are increasingly popular in disadvantaged areas of India because prices are low but penetration is high.

www.heromindmine.com

Meeting with Mr Prem Kapur & Mrs Mrinal Singh, Prem Kapur & Associates

Prem Kapur & Associates are well-known student recruitment agents in Delhi. The UK accounts for about 90 percent of their business and last year they sent over 150 students to study there.

The vast majority of students they counsel want to study postgraduate qualifications, with only a small percentage interested in undergraduate degrees or vocational qualifications. Those who want to study undergraduate programmes are often from wealthy families and have graduated from international high schools. Postgraduate qualifications tend to be more popular due to their shorter length and because Indian parents feel more comfortable sending their children overseas when they are a little older.

In terms of the demand for Indians to study purely English language courses abroad, Mr Kapur believes that this would be very low. Some Indians will need to do a pre-sessional English course before starting their academic course, but most Indians wouldn't consider going abroad just for English.

In contrast, he sees a lot of potential for English UK members who are interested in setting up a school in India, as there are currently only a handful of good quality private English schools in the market. He would like to hear from any member who is interested in doing this.

Leading English language providers in India at the moment include Veta (www.vetaglobal.com), Inlingua (www.inlinguanewdelhi.com), Russells Institute of Spoken English (www.russells.in), British School of Language (www.britishschooloflanguage.com) and British Academy for English Language (www.bafel.co.in). All these schools have invested substantial amounts to establish their brands, which has taken time, but is now paying off. He wants English UK members to realise that the Indian market needs to be viewed as a long-term market, and once reputation and credibility are established, the potential is limitless.

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Tuesday, 16 February 2010 - Delhi

Meeting with Vivek Agarwal, CEO, Liquid e-learning services

Liquid was established in 2002 as an e-learning content solutions company that provides blended learning solutions for companies, governments and academic institutions. They also have a small English language school which teaches about 300 students per year and are a Cambridge exam centre. The company's motto is to create learning solutions that take the shape of the learner, and its name is based on two root words: 'Liquidus' – Latin for 'fluid or 'flowing'; and 'vid' – Sanskrit for 'to know'.

One of Liquid's most popular blended learning solutions is an English language training programme called 'English Edge', which was developed in association with BBC Active (a Pearson and BBC joint venture) and combines instructor-led and computer-based learning. The programme has four levels that can be delivered alongside vocational or higher education courses. There is also a separate English Edge product for primary school children which follows the school syllabus. For every hour of classroom content, there is 30 minutes of self-study for students to complete in a computer lab at their school. Teachers are given extensive training on how to use the software as well as how best to incorporate it into their lesson plans.

Vivek believes that English Edge has become so popular in India because it is an affordable way to bring English to the masses and improve the skills and lesson planning of under-trained teachers. The number of users of English Edge has grown dramatically in the last few years as more and more schools invest in the technology to support e-learning in the classroom. Last year, Liquid had about 50,000 registered users. This year, there are more than 100,000 users, and Vivek sees demand at least doubling again in 2011.

Other Liquid blended learning products focus on improving vital soft skills such as public speaking, debating, resume writing and interview handling, as well as English language skills for specific industry sectors such as engineering, IT, hospitality, fashion and finance. The company has also partnered with

Edexcel to create an online preparation course for A-levels, and will soon be launching a blended learning product to prepare for IELTS examinations.

Vivek is interested in hearing from any English UK members who would like to create a blended learning solution for their school. The company has considerable expertise in this field, and it is much more affordable to create e-learning systems in India than in the UK. Vivek travels to the UK about once every three months and would be more than happy to meet with members who are interested in this proposal.

In terms of opportunities for members in the Indian market, Vivek believes teacher training courses and courses for young learners would prove popular. He also believes there would be considerable demand for premium-priced soft skills and business English courses for high-level executives who do not have the time to travel to the UK. He estimates these executives would pay £1000-2000 for a four week course at a high quality school in India.

Finally, Vivek believes India itself is becoming an attractive destination for English language tourism. There are considerable opportunities for members to develop courses that combine English language learning with tourism, culture and leisure activities, for more adventurous young people who are looking for somewhere different to study English. Vivek believes obtaining visas for these types of courses would not be a problem in India, and beach resorts such as Goa and Jaipur would be obvious location choices. He would like to hear from any English UK members who are interested in doing this.

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Meeting with Preeti D'Mello, Pearson VUE India

Pearson's VUE division in India was only established two and a half months ago and its purpose is to market and provide support for a whole suite of Pearson products including teacher training, curriculum development, examination services, e-learning, certification and custom content. The division currently has two staff members, but a third member will be joining them soon and they will be responsible for all countries in the Indian sub-continent. Pearson's publishing arm, Pearson Education, has been in India for a long time and has good contacts in the education sector. They hope to leverage these contacts, and the strong brand name that the publishing arm already has in the market, to launch and grow this new division. They are expecting to start offering their English exams here in about two months' time.

Preeti is interested in hearing from any English UK members who would be interested in tying up with them for teacher training, direct teaching in-country, or curriculum development. She sees considerable opportunities for three way partnerships between local private schools or colleges, Pearson VUE and English UK member schools, where on completion of a course, a student would receive a certificate from all three partners to certify their achievement. Indians view proof of achievement as essential, because education is seen as an investment in one's future career. By offering a Pearson English test at the end of the course, in addition to certificates of completion from all three partners, these courses would appear even more attractive to students and there would be considerable demand.

Another area where Preeti would be interested in working with English UK members is in tie-ups with government schools. A lot of opportunities exist here as the demand for English language learning among the lower socio-economic classes continues to grow and more and more people aspire to improve their English in order to access better job opportunities and improve their social standing. Through Pearson's long-established publishing division, they already have some contracts with government schools and will be looking to expand this further. Preeti would be interested in hearing from any UK providers who would like to partner with them in this.

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Meeting with Amit Chaturvedi, Head of Education UK- North India, British Council

Last year, about 250,000 Indian students chose to study abroad, and of these, 44,300 went to the UK. About 75 percent chose to study postgraduate courses, 21 percent chose undergraduate courses, and

the remaining 4 percent chose PhD, vocational and English language courses, although vocational and English language students made up a very small percentage.

There are a large number of agents and educational consultants specialising in student recruitment to the UK, and most students use agents to book their course. In 2007, there were over 290 agents representing UK education, however few of these represented ELT providers.

The UK remains the most popular destination for postgraduate studies for Indian students due to the short length of courses and the possibility of obtaining a Post Study Work visa on graduation. The US is the most popular destination for undergraduate studies, particularly if students can get scholarships. Australia is the preferred destination for vocational training. Other markets that have been increasing in popularity include Singapore, Japan, Switzerland, Germany and France.

India continues to be a booming market for study abroad to the UK. Last year, there was a 73 percent increase in student visa applications to the UK from March to October compared with the same period in the previous year. Amit believes that the continued popularity of the UK for Indian students will depend heavily on the visa regime and what changes the government decides to implement after the review. From experience, he has seen how tightening the visa rules in the US after 9/11 and in Australia in more recent months led to a sharp decline in the number of Indian students choosing to study there, and any tightening of UK visa rules will likely result in students starting to look elsewhere.

In terms of opportunities for ELT, Amit believes it would be difficult to attract Indian students to study English language courses in the UK. He sees more potential for UK providers to come to the Indian market and set up a language school in partnership with a local company. There are already some UK providers who are doing this very successfully.

If a member were interested in setting up a local school, he recommends choosing second or third tier cities where there is less competition and students have comparatively limited options in terms of studying English at present. He also recommends schools teach not only English but other popular foreign languages and soft skills as well. In addition, all courses offered must add value to a student's CV, as Indians see education as an investment in getting a better job in the future and will expect results. Short 10-15 week courses that focus on business English and can add something to a person's employability would be popular.

The British Council can provide a consultancy service to help UK providers interested in entering the Indian market. Last year, they provided consultancy services to about 80 institutions, helping them to meet the right people. This service is available to both partnership and non-partnership members, although non-members pay a higher fee.

The British Council also holds exhibitions twice a year to promote British institutions. These exhibitions used to be held only in Delhi and Mumbai, but are now being held in second and third tier cities as well, and are open to partnership and non-partnership members.

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Wednesday, 17 February 2010 - Delhi

Meeting with Sagrika & Raman Narula, Narula International

Narula International is a student recruitment agency. It was established in 1991 and represents institutions from the UK, Australia, Canada, Ireland, New Zealand, USA and Europe, as well as institutions from newer destinations such as Singapore, Japan and Malaysia. Last year, they sent about 90 students abroad, and 60 of these went to the UK, which is their biggest market. They are also an IELTS testing centre and offer IELTS coaching.

In the past, about 70 percent of their students went to study postgraduate degrees overseas, however in the last two years they have seen a substantial increase in demand for undergraduate degrees, and

these students now account for about 50 percent of their business. The most popular subjects for both postgraduate and undergraduate degrees are business, IT, engineering and hospitality.

In terms of English language courses, the agency has only sent students for pre-sessional courses in the UK in the past. They don't believe there is a demand for Indians to go abroad to study English as there are so many English schools in India that would be cheaper. They have sent a few students to Australia to study ELICOS programmes before, but it was difficult for them to get visas for these courses, and Sagrika predicts the same would be true for the UK as well.

In India, getting into higher education is very difficult. Demand far outstrips supply, so students who can afford to will go overseas for higher education if they don't get into a good Indian university. Those who can't afford to go abroad will opt for a private college in India.

In terms of where to study, Sagrika stated that Australia used to be the most popular destination, however due to the tightening of visa regulations and racial violence against Indians there, the UK has now become the most popular country.

Singapore is the fastest growing destination. Students find it easy to settle in as there are many Indians living there and it's close to home, and tuition fees and living costs are cheaper. Some Singaporean institutions are offering UK and other degrees through partnerships, many of which are on a fast-track basis where students can finish an undergraduate degree in two years instead of three.

When deciding which country or institution to choose, Sagrika believes that word of mouth and recommendations from family and friends are most important in the decision-making process. Most students that she counsels have spoken with people who have already studied overseas before visiting her agency.

Safety is another concern, which can clearly be seen in the huge drop in students going to Australia since racial violence occurred there. In addition, having a strong brand name in the market is important, and she recommends institutions have a good website, advertise online and use newspaper advertisements (particularly in the education supplements in the Times of India and Hindustan Times) to establish awareness and build brand recognition.

If any English UK members are coming to India, Sagrika indicated that she would be interested in arranging a meeting with them. They already have a lot of partner institutions, but are always interested in investigating new opportunities.

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Appendices

Please find a copy of the following reports:

- A. UK Trade & Investment – Educating & Training in India, November 2009
- B. British Council/Ipsos MORI – Presentation on 'Demand for English Language Services in India', May 2009

Sector in Market Report

Education & Skills India

Produced by: Education & Skills- Team India
Lead Officer: Sunita Kapoor, Senior Trade & Investment Adviser
Last revised October 2009

Whereas every effort has been made to ensure that the information provided is accurate, the Commercial Departments of Diplomatic Service Posts overseas as part of the joint trade development operation, UK Trade and Investment, of the Foreign and Commonwealth Office ("the FCO") and the Department for Business, Innovation & Skills ("BIS") accept no liability for any errors, omissions or misleading statements in such information and accept no responsibility as to the standing of any firm, company or individual mentioned.

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OVERVIEW

Education is a priority sector for the newly formed UPA government in India. With a wide demand-supply gap in this sector here, there exists a range of opportunities in areas like corporate training, vocational education, skills training, further education (FE), higher education (HE) and school educational equipment, where the UK industry can bring in their expertise into the Indian market with HMG help. The current institutions delivering education in India cannot meet the increasing demand of the Indian market. The High Commission works closely with the British Council in India in a range of activities consistent with helping the UK providers access and succeed in the Indian market, whilst developing UK/ India bilateral beneficial relationships.

Characteristics of the Market

The education market in India is estimated to be approximately USD50 billion (school education accounting for USD20, higher education for USD20 billion & vocational education for USD10 billion).

With a population of 15-24 years age group expected to reach 235 million by 2010, only 5% of which is estimated to have acquired formal vocational education / skills training, there is a huge potential in this market. Skills upgradation has been identified as a major task by the current education ministry. Indian industry chambers like FICCI & CII have also roped in their industry members to engage in a public-private partnership to upgrade the existing Industrial Training Institutes & set benchmarks for the proposed new ones. The UK-India Skills group consisting of education institutes and corporate training providers have met to discuss areas of improvement where the UK can bring in expertise to bridge the gap.

In order to meet international quality standards in education, there is a huge potential in the following segments of education and training and the UK is a sought after market, especially for the private sector:

1. Technical skills and Vocational education
2. Higher Education
3. Educational equipment and software
4. Corporate / Professional Training

Major metro cities like Delhi (North), Mumbai (West), Kolkata (East) and Chennai (South) remain attractive destinations for outward investment and

student recruitment. Further, the emerging cities like Ahmedabad, Pune (West India), Chandigarh, Ludhiana (North India), Bhubaneswar, Guwahati (East India), Hyderabad, Trivandrum and Cochin (South India) are also prospective markets for education which have a lot of potential to be explored in areas like corporate training and international school linkages. With the rise of private hospitals, Biopharma clusters, infrastructure development there is opportunity for industry-academia interface in the fields of lifesciences (like nurse training, continuous professional development), manufacturing, R&D and innovation.

OPPORTUNITIES

Technical skills and vocational education

Vocational training in India is offered through public (government owned) Industrial Training Institutes (ITIs) as well as private (owned by private sector) Industrial Training Centres (ITCs). As per the Indian Constitution, vocational training is a concurrent subject of both Central and the State Governments.

There are over 1800 publicly-funded Indian Technical Institutes (ITIs) which cater to only 300,000 students, and have been heavily criticised for teaching irrelevant skills on outdated equipment. There are also an enormous number of private institutions - engineering colleges, business schools etc - which fill the demand the public system cannot meet. But many of these are of poor quality and fail to teach the most basic requirements for the work place. India's largest IT firm (TCS) has complained that only 1 in 15 of Indian graduates are employable - a daunting comment given the 138 million young people expected to hit the Indian job market by 2020.

The current capacity of skill development programmes is 3.1 million and yet India has set a target of skilling 500 million by 2022. The major challenge of skill development initiatives is to address the needs of such a huge population by providing skills in order to make them employable and help them secure work. Skill development for persons working in the unorganized sector is a key strategy for the government - as this sector is estimated at 433 million people.

The All India Council for Technical Education (AICTE) is a statutory body established by the Government of India to plan and co-ordinate development of technical education system in India. AICTE has in place guidelines for approval of foreign education institutions offering qualifications in India. This regulation will affect UK institutions offering diploma, graduate degree, post graduate and research degrees in following subjects:

-
- Engineering and technology, architecture, hotel management and catering technology, pharmacy applied arts and crafts
 - Post Graduate Degree in Management (MBA)
 - Post Graduate Degree in Computer Application (MCA)

Major industry associations including CII and FICCI are working closely with the Indian Government to achieve the objective of upgrading the vocation education sector in India.

A number of UK qualification providers are active in India including Edexcel, City & Guilds and Scottish Colleges International (SCI).

Higher Education

Offers maximum opportunities for British education suppliers. A range of British universities and colleges are already active in the market in one of two ways:

- a) Recruitment to Britain - 'Education UK certificate for agents' has been rolled out in South India. This certificate is a pre-requisite for agents to continue in the UK Visas preferred agents scheme.
- b) Franchises and distance learning – With the ever increasing demand for new technical and managerial skills, public and private sector universities and colleges in India are increasingly seeking overseas affiliations to improve the quality of their courses and to add international recognition and prestige. The demand for distance taught/ distance learning and e-learning courses has also increased.
- c) Potential to open Campuses in India – The Indian government is currently working on 'Foreign Education Providers' Bill. This bill will lay down guidelines for foreign universities to set up campuses in India. As per the current plan, the government plans to table this bill in the parliament in the session starting November 2009.

Educational equipment and software

There is scope for UK education aids to supply to schools in the early years and primary segments. Teaching aid products (like interactive whiteboards, ICT education technology in school) and english language courses are some of the areas that has seen significant enquiries from the Indian side and the UK offers good scope.

Equipment suppliers have traditionally approached the Indian market with some caution given the shortage of funds within the public education systems and the risk of (cheaper) reproduction being manufactured locally. However opportunities are likely to increase as the level of funding rises within both the public and private institutes, and as the industry upgrades its requirement for new technical skills and processes.

Corporate/Professional Training

Given the focus on technical and science education, majority of Indian students lacks business and soft skills. Hence companies have housed in-house training options for employers or use training consultants who offer technical and skills training. Many MNCs and IT companies have in-campus training and induction programs for new recruits.

Globalisation and deregulation of markets all around has forced Indian companies to restructure and seek alternate markets for their products. The companies have been forced to improve productivity in the organisation and the quality of their goods and services. In a scenario like this, more and more companies have recognised the fact that it is the people of their organisation who will drive the performance. A greater importance is now being placed on training and re-educating the technical and managerial work force to meet the requirement of the emerging economy.

There is a potential for British professional training organisations to come in and fulfil this requirement.

UK-INDIA EDUCATION COLLABORATIONS

The education team at the UK Trade & Investment-India (UKTI) promotes the UK education and training on quality and assurance, reputation, innovation, value for money (where UK education is as expensive, in price sensitive markets). It projects the 'UK education' as a strong brand in world-class products and services such as in educational ICT.

The UKTI organises trade missions centred on major education events around the globe (like BETT-UK, BES-Malaysia, WorldDidac-India) and invites new and existing players across various education segments to meet and discuss possibilities of potential partnership opportunities. Many of these trade missions have brought out success stories in the form of joint course offer between Indian and UK universities.

The education team also engages with the Research Councils UK (RCUK) and Science & Innovation (SIN) departments on discussing the scope for industry-academia innovation and R&D between India and the UK.

As a result of the networking/research links developed by the UK India Education and Research Initiative (UKIERI), the Science and Innovation Network and most recently the new Research Councils, UK (RCUK) office and the priority given to HE collaboration in the 2008 PM Summit:

- It is estimated that 230 collaborations exist in India of which the greatest number, 86, is with the UK institutions (79 with US).
- The UK is seen by the Indian Government as India's leading partner in the development of the new public HE institutions (specifically IIT Punjab and IISER Pune), with nearly 40 UK universities expressing an interest in one or other collaboration.
- Through the British Council and UKIERI, the UK is strongly engaged in strengthening the leadership of Indian universities and improving the way the quality of HE is assessed and regulated.

UK as an attractive destination for Indian Students

There are around 31,000 Indians studying in the UK (12% of all foreign students). The factors that have attracted students to the UK include the attractions of London to young Indians, the (until recently) attractive employment opportunities in the City, and the negative impact of post 9/11 US visa restrictions on students who might otherwise have thought of going to the US. Other drivers include:

- Conscious policies by the government and HE sector.
- Promotion of the UK higher education by the British Council and the individual universities.
- The decision to allow foreign students graduating from UK universities to work for two years in the UK.
- Education UK fairs are held in New Delhi in November and February every year.
- Pre departure briefings are organised for students across 9 cities in July August.
- The education UK team identified and worked upon building up an Agents network in the 2nd and 3rd tier cities in India with the objective to maximise the reach for prospective students.

Frequently requested information at the Information Centre of the British Council indicates that almost 50% enquiries are for Business Management and Commerce courses. Science & technology courses (including computer

science) and medicine are also in great demand. Subject enquiries can vary considerably region-wide, often influenced by the local employment situation and the indigenous industries.

Postgraduate (PG): The PG market continues to remain an attractive proposition, accounting for about 65% of the enquiries received at the Education UK zone, mainly due to the short course duration.

Challenges

Although British education is respected for its quality, it is perceived as an expensive product because the pound is so strong in currency markets and scholarships are rare. There is a need to reinforce the message that British courses offer value for money through their shorter/ more intensive masters' programmes (especially the MBA). Britain also needs to be projected as the gateway to Europe, a happening place where students can gain international experience and exposure.

Competition

Business tie ups

When it comes to joint venture in offering courses or supplying education equipments into India, the major issues are:

- product pricing
- brand recognition
- marketing and promotion (selling a USP to counter cheap locally available alternatives /imports)
- Government impediments

UK education

So far the main competition came from the USA and Australia. But after the 09/11 attack in the US and the recent racial attacks in Australia, there seems scope for more attraction to the UK.

In general, the USA is generally perceived as 'the land of opportunity'. It sponsors a large number of scholarship programmes and has a pre-eminent reputation for such areas as management and engineering. Students appreciate the opportunity to work to support their studies and this gives USA a strong perceived cost advantage as does the perception that institutions are more altruistic and will encourage and provide financial assistance to able students on completion of their first year.

Australia is perceived to offer a variety of competitively priced Diploma level courses. The country has proved particularly successful in attracting Indian students at the undergraduate level and for vocational courses through the TAFE colleges.

Besides Australia other countries that are increasingly recruiting students from India include New Zealand, Canada, France and Germany.

UK India Education and Research Initiative (UKIERI)

In April 2006 UK successfully launched UKIERI, a major education and research initiative strongly supported by both Prime Ministers to facilitate the development of research and collaborative partnerships between UK and Indian institutions. It will run for five years from 2006/2007 and will enable UK to bring about a 'step-change' in educational relations between India and the UK.

The UKIERI has achieved the following targets till date.

- 500 new Higher Education (HE), Further Education(FE) and Schools links
- 67 HE research links (standard and major awards)
- 20 HE collaborative programmes

UKIERI has a Professional and Technical Skills strand. This strand aims to facilitate partnerships between Indian and UK FE colleges and Indian vocational colleges. The colleges are encouraged to work together on joint educational projects with an objective to meet industry skills gaps in two strategically important areas – financial services and creative industries. The major activities under this strand include development of joint projects, student and staff exchanges and work placements. Funding is for three years and so far 7 partnerships have been established with another 4 planned in the coming year. Project English (UKIERI's large English language programme) have a strand that specifically works with the corporate sector to address English needs of their staff – especially in the BPO sector.

KEY METHODS OF DOING BUSINESS

Recruitment to Britain

Recruitment can be done in two ways:

- Direct recruitment &
- Agents

Direct recruitment: The British Council organises regular education fairs where a number of British Universities participate. These fairs attract students who are keen to pursue further education outside India. It is a good opportunity for Universities to exhibit in these fairs and brief students about the various courses, accommodation etc. Information on obtaining a student visa is also provided during the Fair.

Besides the fairs, the UK universities arrange regular visits to the Market. The British Council assists the Universities by advertising in the local newspapers and providing them with a room to conduct the interviews.

Agents: Some Universities appoint agents in the Indian market who are available round the year to provide detailed information about the Universities and the courses offered.

Tie-ups/Franchises: To offer courses in India it is advisable for the British Institutes/Universities to provide courses in India jointly with the existing Indian Institutes.

Other education supplies: An agent/distributor in India is recommended.

MORE DETAILED SECTOR REPORTS

Research is critical when considering new markets. UKTI provides [market research](#) services that can help UK companies doing business overseas including:

- **Overseas Market Introduction Service (OMIS):** Bespoke research into potential markets, and support during your visits overseas
- **Export Marketing Research Scheme:** In-depth and subsidised service administered by the British chambers of Commerce on behalf of UKTI

You may wish to contact your local [International Trade Advisor](#) if you are interested in accessing these services, or for general advice in developing your export strategy.

When considering doing business in India, it is essential to obtain legal, financial and taxation advice. A useful contact list of lawyers and other relevant professional bodies as well as further information on the fire, police & security sector in the country is available from the High Commission.

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Web: www.uktradeinvest.gov.uk

Education Events in India

1. FICCI Global Skills Summit: (www.ficci.com)
2. FICCI Higher Education Summit: (www.ficci.com)
3. CII Skills Summit: (www.cii-skillsdevelopment.in)
4. British Council's UK Education Fair: (<http://www.britishcouncil.org/india-educationuk-events-exhibition2009-2.htm>)
5. New Delhi Book Fair, 30 Jan-07 Feb 2010
(www.nbtindia.org.in/world_book_fair.shtml)

Useful Websites

The British Council
www.britishcouncil.org.india

UKIERI
www.ukieri.org

Universities UK
<http://www.universitiesuk.ac.uk/international/>

All India Council for Technical Education
www.aicte.ernet.in

Department of Education, Government of India
<http://education.nic.in>

Association of Indian Universities (AIU)
www.aiuweb.org

National Assessment and Accreditation Council (NAAC)
www.naac-india.com

University Grants Commission
www.ugc.ac.in

SOME USEFUL CONTACTS

The British Council
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Demand for English Language Services in India

May 2009

Objectives & methodology

India Main Findings – 5 key areas

One – The Market

Large and growing market

- India's private sector education and training market is estimated to be worth US\$40bn, with a potential 16% five year CAGR (CLSA Asia: Pacific report, 2008)
- Of this, the adult market for ELT (aged 20+) is estimated to be worth around US\$450m
 - CLSA - estimates 3.8m people paying average fee of US\$120

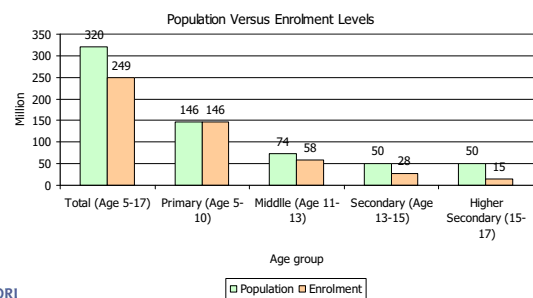
Demand for English-language training

Age	Total (m)	Urban (m)	Rural (m)	Urban tutoring (%)	Rural tutoring (%)	Total (m)	Average fee (Rs)	Market (Rsm)	Market (US\$m)
20-24	105	31	73	2.0	0.5	0.99	5,000	4,969	124
25-29	94	28	66	4.0	1.0	1.79	5,000	8,936	223
30-34	83	25	58	2.0	0.5	0.79	5,000	3,943	99
English training market								17,847	446

Source: CLSA Asia-Pacific Markets, United Nations Population database

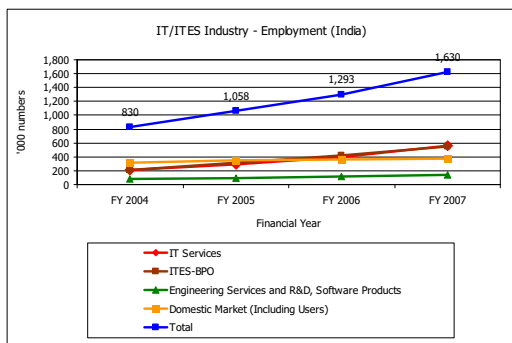
Majority of English Learning population aged below 18

- Estimated 320m aged 5-17 (Census 2001 - projected to 2008)
- 249m students (the English learning population) enrolled at primary, middle, secondary and higher educational levels (Department of Education)



One of major drivers is growth in IT/ITES industry

- Top five IT companies spending US\$ 500 million a year on education and training for their employees
- Many established large training campuses for this



Data Source: NASSCOM

Two – The Players

Some key players, other than British Council

- British School of languages (BSL):
 - Founded 1975
 - Over 1.6 million students trained in spoken English
 - A network of 30 study centres across the country
 - Caters to a broad audience - from those who do not know English to those who aim to hone their English speaking skills
 - Works in the corporate training sector – Ashok Leyland, Ranbaxy, American Express, U.N.O, Asian Paints are some of the clients
 - Course fees range from Rs 2500 to Rs 3000

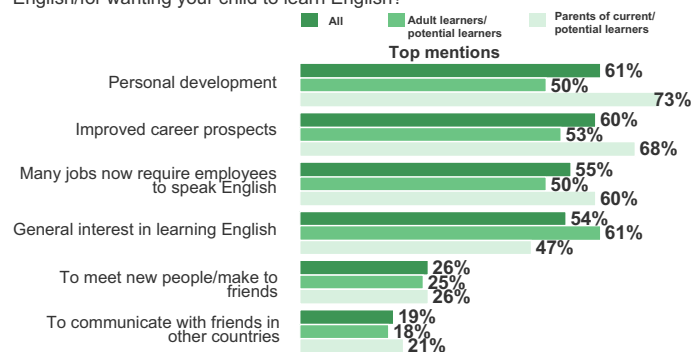
Some key players - cont

- Veta English language training institute (formerly known as Vivekananda Institute):
 - Founded 1981
 - Over 2.2 million students trained in spoken English
 - A network of 200 study centres across the country
 - Some centres can accommodate more than 500 students
 - Veta offers a 'Self tutor' pack for those learners who cannot access one of its centres
 - Seven main programmes, including 'Veta English Holiday'

Three Learners/potential learners

Personal development + improved career prospects = key reasons for learning English

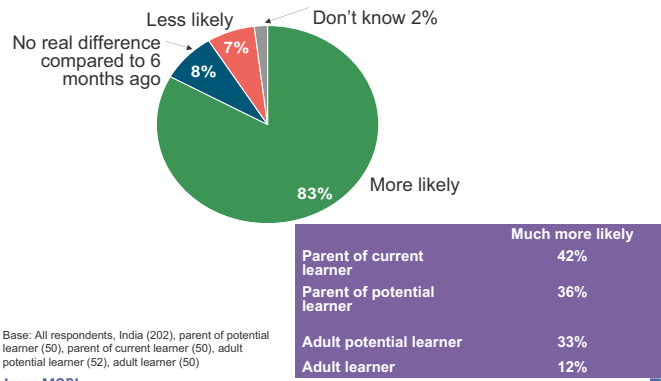
Which of these, if any, best describes your reasons for wanting to learn English/for wanting your child to learn English?



Base: All respondents, India (202), adult learner/potential learner (102), parent of current/potential learner (100)

Increased propensity to learn, esp among young

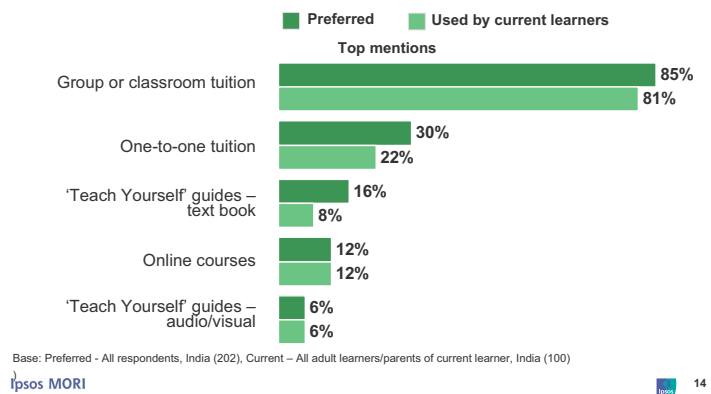
Do you think you/your child are more likely or less likely to learn English (outside school) than you were 6 months ago?



13

Group tuition most used and most preferred

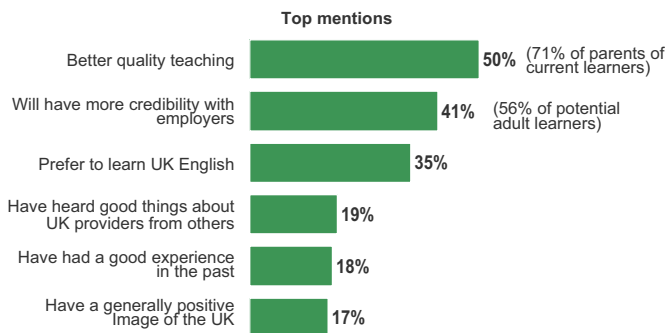
In which of these ways, if any, would you prefer (your child) to learn English / are you/your child currently using to learn English (outside school)?



14

Better quality teaching, credibility and UK English = key reasons

Why do you say you/your child would study at a UK English language institute?

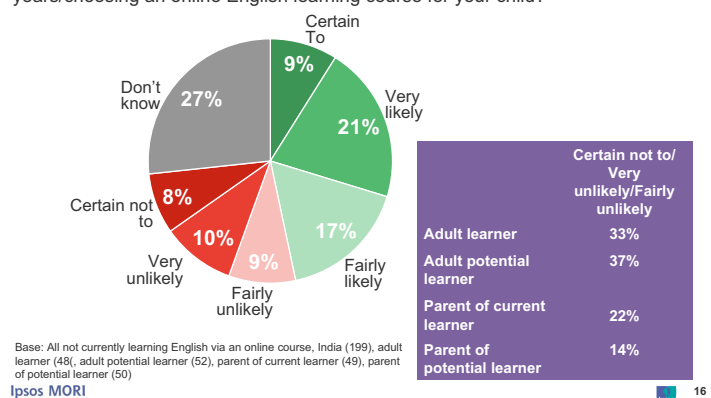


Ipsos MORI

15

Less than half would consider online learning

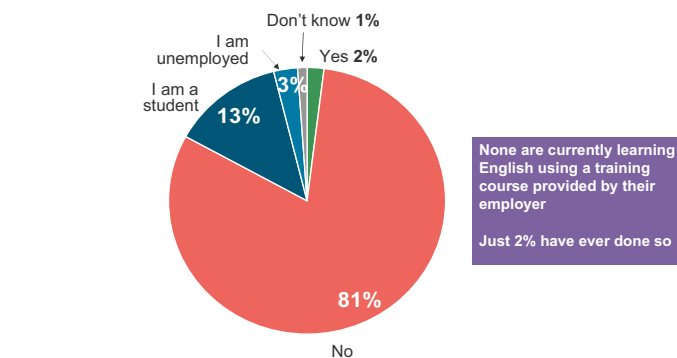
How likely are you to consider learning English online in the next 2-3 years/choosing an online English learning course for your child?



16

Few employees offered ELT at work

Does your company offer English language courses for employees?

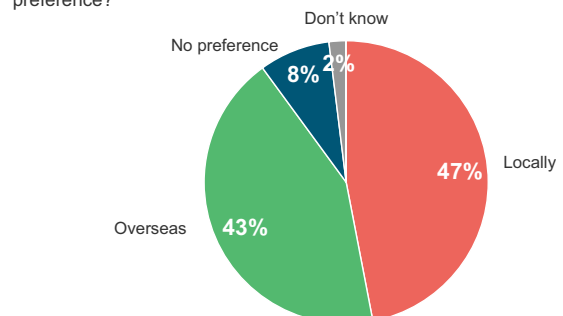


Ipsos MORI

17

Divided opinions over local vs overseas materials

When it comes to materials for English language learning, do you generally prefer those produced locally or by overseas organisations or do you have no preference?

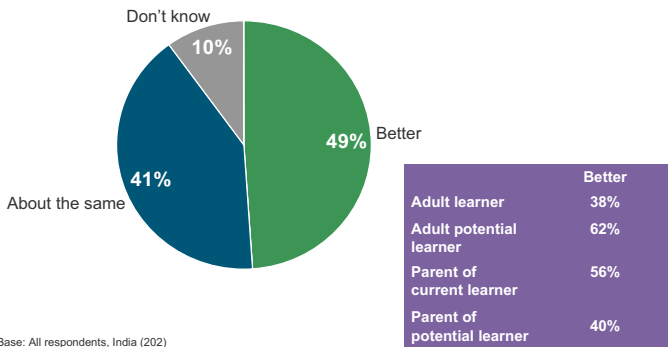


Ipsos MORI

18

UK materials the same or better than others

Do you think that materials produced by UK organisations for English language learning are generally better or worse than those from other overseas organisations or are they about the same?

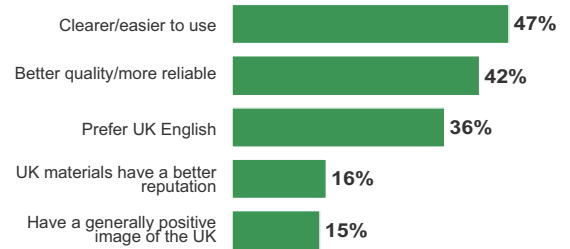


Base: All respondents, India (202)
Ipsos MORI

19

Ease of use & quality are strengths

Why do you say you materials from UK organisations are better?



Base: All who think materials from UK organisations are better, India (99)
Ipsos MORI

20

Four - English language teachers*

Ipsos MORI

* These findings are based on just 5 qualitative interviews, so are indicative only

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More emphasis on real command of the language

- Want more emphasis on the basics of the language at an early age
- Exams and assessment to be a better reflection of a student's true ability, rather than ability to learn by rote
- More emphasis on practical application of the language

"It is really tough to make them understand that they really need to learn the language in a very different way and not just to get marks"

IMRB 2008 report on ELT Audience Segments showed fluency as a major area of concern for students, followed by grammar, reading habits and writing skills

Ipsos MORI

22

Fairly high awareness of many UK organisations

- All heard of British Council, BBC, Longmans, CUP, OUP, Pearson and Macmillan
- Many had used books by Longmans, CUP, OUP, Pearson and Macmillan
- Almost all aware of IELTS
- Only university/college teachers aware of exam boards
- Aware of websites, but could not name any

"British Council you know flourishes in many countries, they have the experts. Their main purpose is to help the teachers, in training them. They provide the material and design"

"I would prefer to make use of audio visuals, LCD and CDs, especially British Council, they prepare material in English as a primary and secondary language and that really helps"

- Not necessarily detailed knowledge of what is on offer though
- Assumed they provide English course and materials – reference materials, CDs, cassettes etc

Ipsos MORI

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UK organisations associated with quality

- Materials from organisations known to be reputable are seen as:
 - Good quality
 - Dependable
 - Trustworthy
 - In line with latest needs of the language

"Organisations which are reputable prove fruitful.... You do not have to worry about quality. But if you go in for material from another source you have to be careful"

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More and different opportunities required

Teachers want:

- More seminars and training sessions on communicative language training – ie how best to teach students the basic skills they need
- Better training in the area of student motivation/student psychology
- More on latest training techniques – ideally developed with their particular institution in mind
- Training which keeps them up-to-date with the changing needs of a competitive world
- Opportunities to meet counterparts in other institutions (eg in discussion forums)
- Guidance from experts

“To train the teacher in this (communicative language training) is most important because having just patience is not enough”

“Training in this (student motivation) is very important for any teacher. Only a motivated teacher can motivate his/her students”

Five - Leading employers*

Perfect English in new staff usually not expected

Acknowledgement that some training may be required to improve skills, eg

- To correct errors
- Improve pronunciation
- Improve understanding of other cultures
- Improve confidence in ability
- Link language skills to requirements of the job

“When the trainer takes the training and this person has grammatical issues, some people do have errors, the trainer helps them” (Retail)

Most of those interviewed provide in-house training for relevant staff*; some for all staff

- Particularly call centres – structured training modules, debates, role-playing, grammar, telephone ethics

* The quantitative research shows very few employees say their company offers ELT training, no doubt because most work for smaller companies than those interviewed in the quantitative research.

Only perceived challenge in ELT is time

“We have to make them work a nine hours shift and then to make them sit after a nine hours shift is a bit difficult”

Some do use external providers though

- Two of the five do
- Single provider used – books, notes, CDs, online links and tests

Chosen on the basis of*:

- Cost (major role)
- Level of service
- Course material (including multi-media)
- Expertise of trainer
- Level of trust & commitment shown
- Ability to customise training to needs

“Any external body has to be customised to our requirements”

“Someone who is outsourced is always approachable and they try to give you the best”

High levels of satisfaction

* IMRB 2008 report on ELT Audience Segments – main factors in choice of trainer were course content, presentation skills, educational background, certifications of trainer and previous experience

Low awareness of UK providers

- Only aware of British Council* and British School of Languages

Thought to offer:

- Various types of course
- Reference material, CDs, online links

- But not much known about the offering

- Perception that they are professional, equipped with latest services and training techniques, and well respected

- But also felt to be expensive and not tailored to needs of organisation

* MRB 2008 report on ELT Audience Segments suggested that the BC has a good reputation for ELT among establishments; two-thirds were willing to use ELT services from the BC

Summary & implications

Summary & implications - India

- Large and growing market for English language services
- While taught in all schools, interviews with teachers suggest it is not necessarily taught 'well'.
- There are real opportunities for UK organisations to help teaching of English in schools through working with Universities, school boards, teacher-training and professional development
- Poor quality of learning in schools also means there is a strong and growing demand among learners, both adults and young learners, for ELT institutes

Summary & implications – India - cont

The positive reputation of UK ELT and materials means UK organisation are well placed to capitalise on this demand

– UK organisations/materials associated with quality and high credibility

- Potential barrier: Cost – need lower/higher cost options
- Demand for English skills at a corporate level is driven by service sector in particular (eg growth of call centres)
- Internet access is a key barrier – only 7% of population have access – as are limited opportunities to practice oral skills
- Has wider implication for materials offered by UK organisations – need to offer hard copy as well as online learning materials
- Rapid adoption of mobile based access may change this though – so should be monitored carefully

British Council, Project English

- Started in 2007
- Four Strands
 - State
 - Corporates
 - Direct Teaching
 - UK Reputation

To date delivered training in seven states, reached 1,300 master-trainers, over 400,000 teachers and nearly 5 million learners using local expertise.

Use of website (Learn English Professional) plus a teacher magazine with ETP and MacMillan India to reach more.



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