

Brandr
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Rethinking Tertiary Education India



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The purpose of Brandr Consulting is to contribute, in bringing out customised design and approach thereby establishing brand ecosystem, based on organisation's philosophy and purpose. In our view the brand ecosystem would enhance the capabilities of the internal functions thru bidirectional communication within the organisation and outside marketplace.

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Enhanced focus in Tertiary Education and global demographic transitions would push tertiary education system to Globality

Tertiary Education – Indian Overview

The Tertiary Education system over decades transformed from merely concentrating on enhancing student's skills to bolster country's competitiveness. The quality and reach of tertiary education has been a major force behind the nation's social, cultural, and economic pre-eminence. Tertiary education is instrumental in fostering growth, reducing poverty and boosting shared prosperity. It benefits not just the individual, but the entire educational system.

However, the curriculum standards, course content, evaluation process and entrepreneurial spirit still remain a great challenge at micro level, coupled with macro challenges like declining demographics, women empowerment, corporate expectations and international mobility. Yet dramatic changes in the environment are forcing institutions to rethink traditional ways of doing things to sustain these contributions in the years ahead.

Tertiary Education – Headwinds

- Demographic transition
- Alternative learning models
- Government support
- Student ROI
- Consistent growth in services and operating cost
- Ranking objectives
- Eco system

Gross enrolment ratio in tertiary education

- A global comparison with India

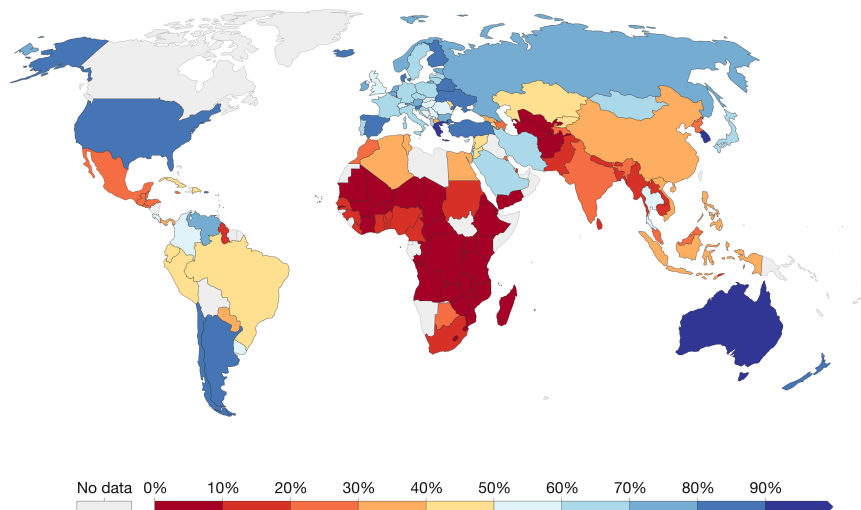
Gross enrollment ratio in tertiary education, 1970 to 2015

Total enrollment in tertiary education, regardless of age, expressed as a percentage of the total population of the five-year age group following on from secondary school leaving.

Gross enrollment ratio in tertiary education, 2014

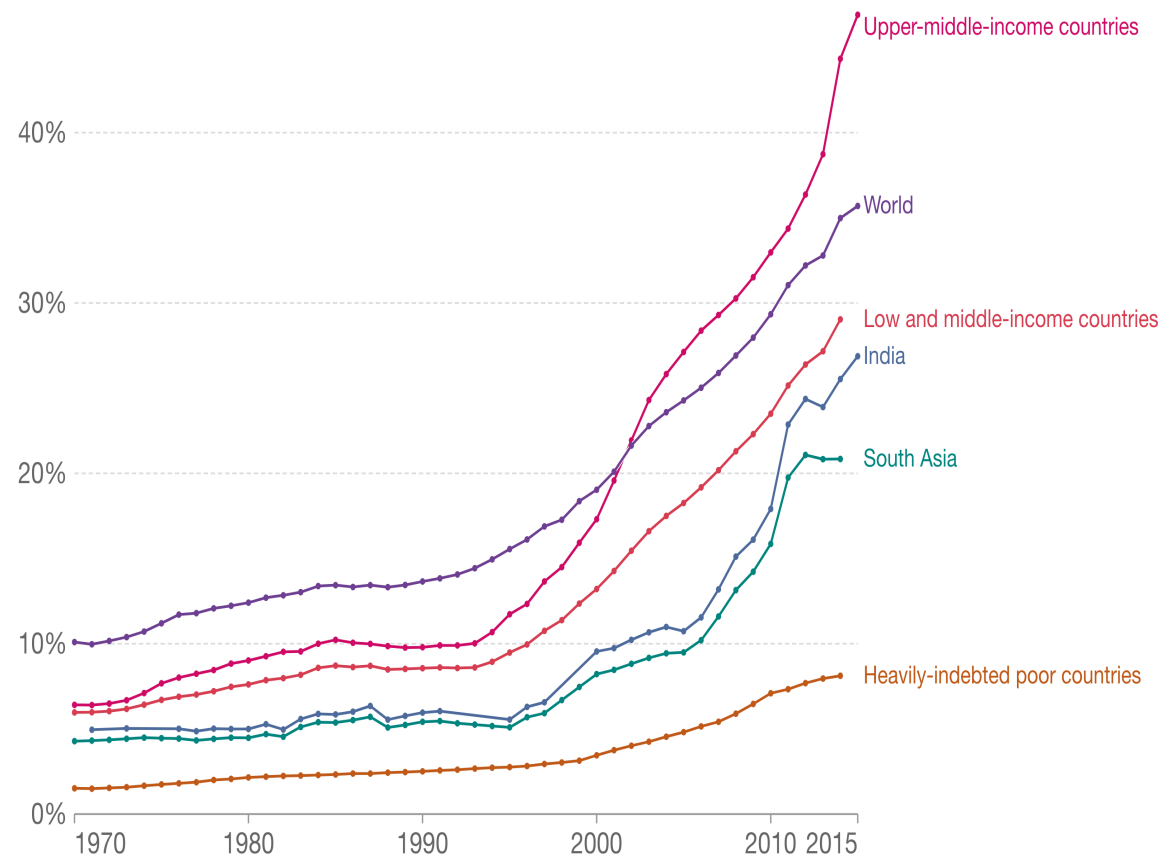
Total enrollment in tertiary education, regardless of age, expressed as a percentage of the total population of the five-year age group following on from secondary school leaving.

Our World
in Data



Source: UNESCO Institute for Statistics

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Tertiary education – India

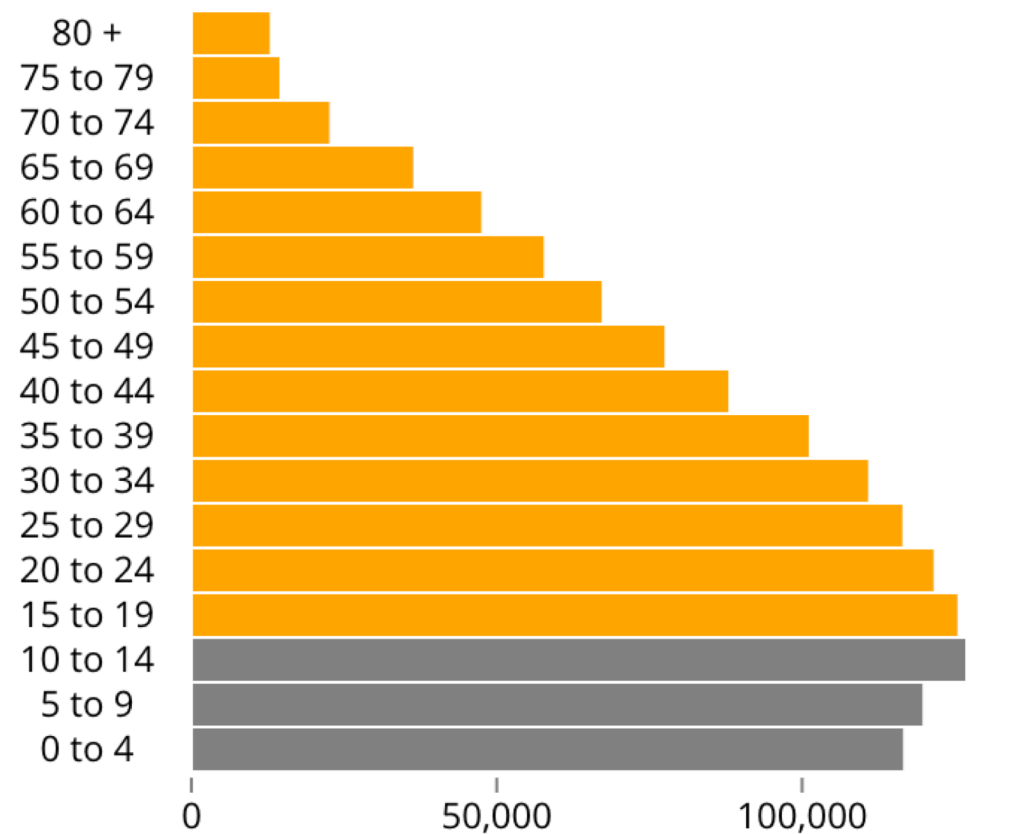
Social Demographics

Socio-economic indicators

Total population (in thousands)	1,366,418
Annual population growth (%)	1
Population 15-24 years (in thousands)	247,486
Population aged 14 years and younger (in thousands)	363,717
Rural population (% of total population)	65
Total fertility rate (births per woman)	2.20
Infant mortality rate (per 1,000 live births)	28
Life expectancy at birth (years)	70
Prevalence of HIV (% of population aged 15-49 years)	...
Poverty headcount ratio at \$1.90 a day (2011 PPP) (% of population)	22.50
GDP per capita - PPP\$	6,994
Annual GDP growth (%)	-8
Total debt service (% of GNI)	1.80
GDP in billions - PPP\$	9,557

Source: UNESCO

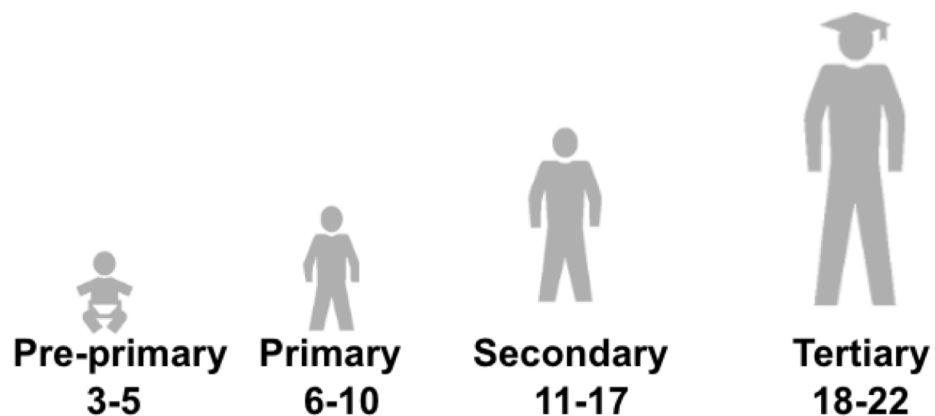
Total population by age group, 2019 (in thousands)



Population aged 14 years and younger represents 27% of the total

Population by Education Level

Official school ages by level of education

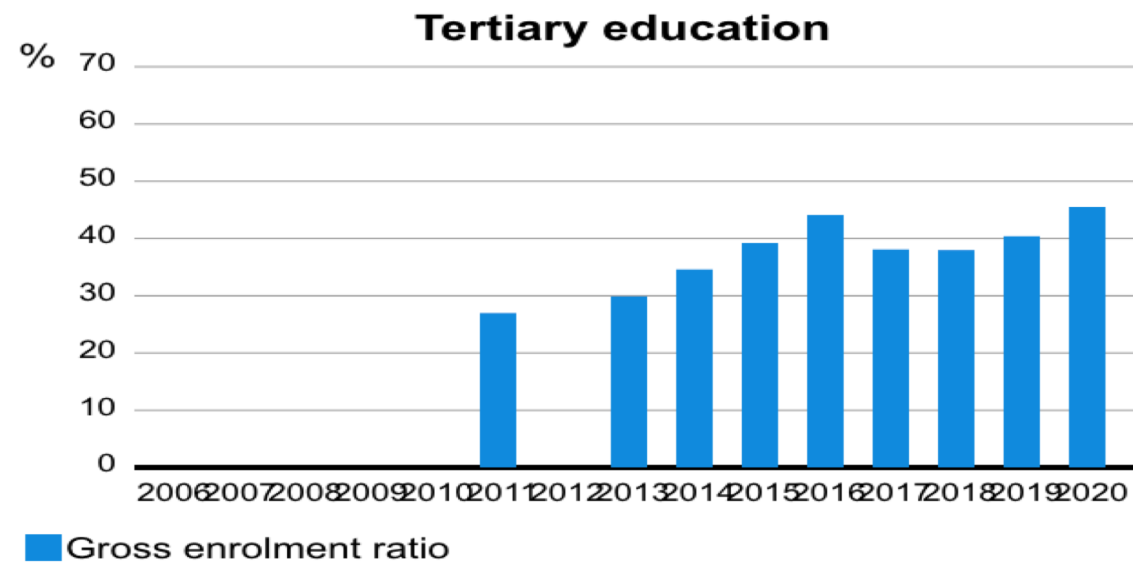
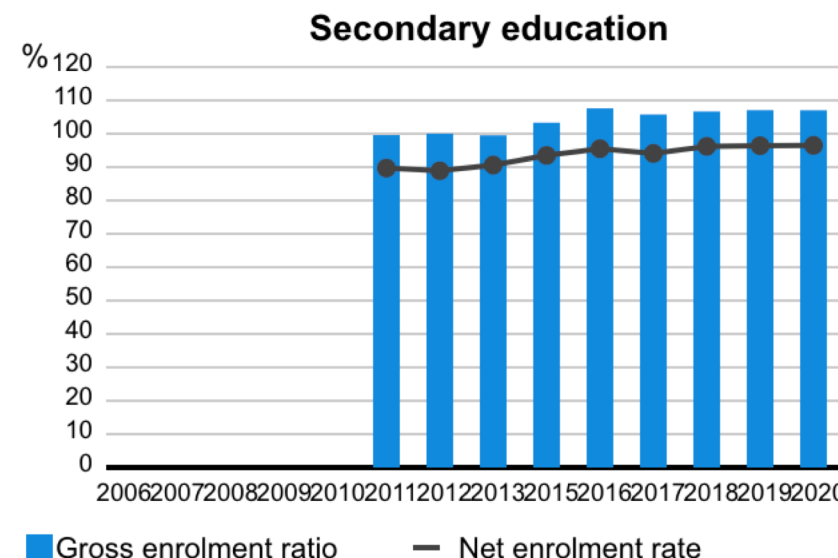
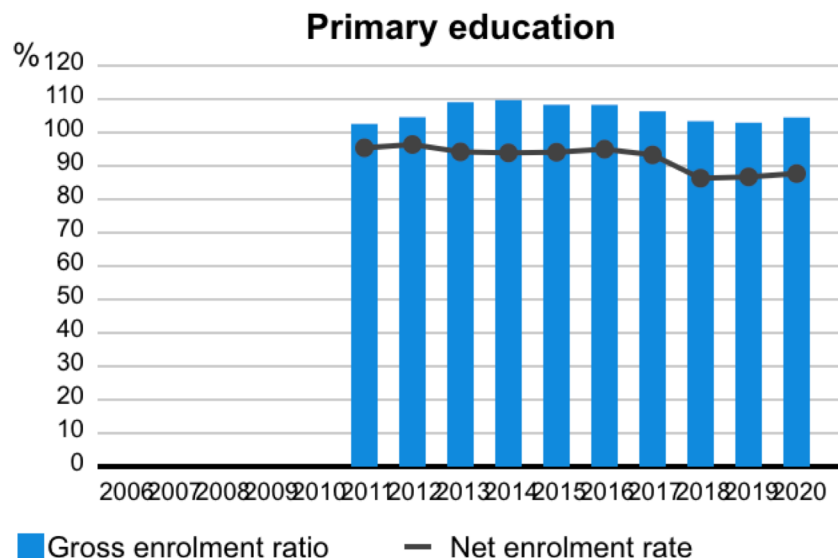


School-age population by education level

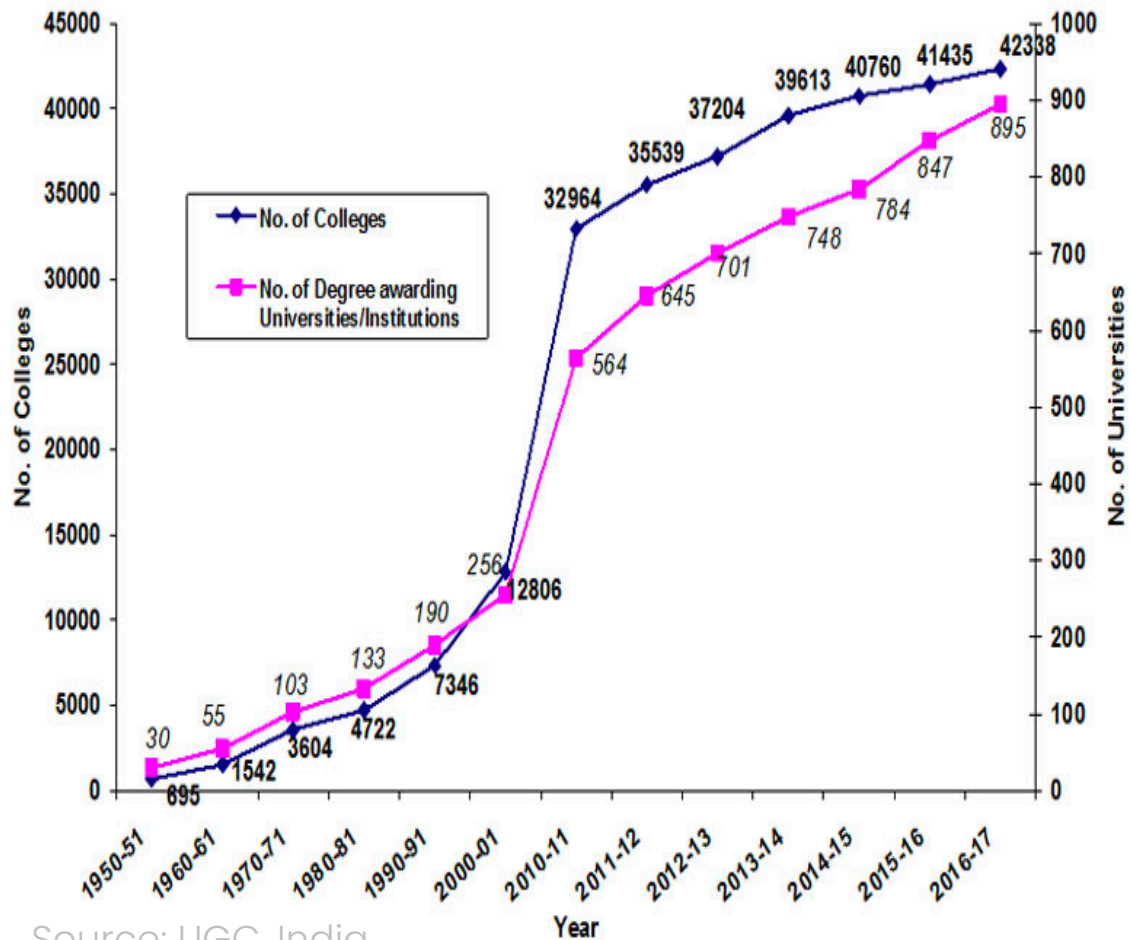
Pre-primary	69,409,922
Primary	121,821,478
Secondary	177,585,036
Tertiary	123,611,592

- Compulsory education lasts 8 years from age 6 to age 13
- For primary to post-secondary education, the academic year begins in April and ends in March

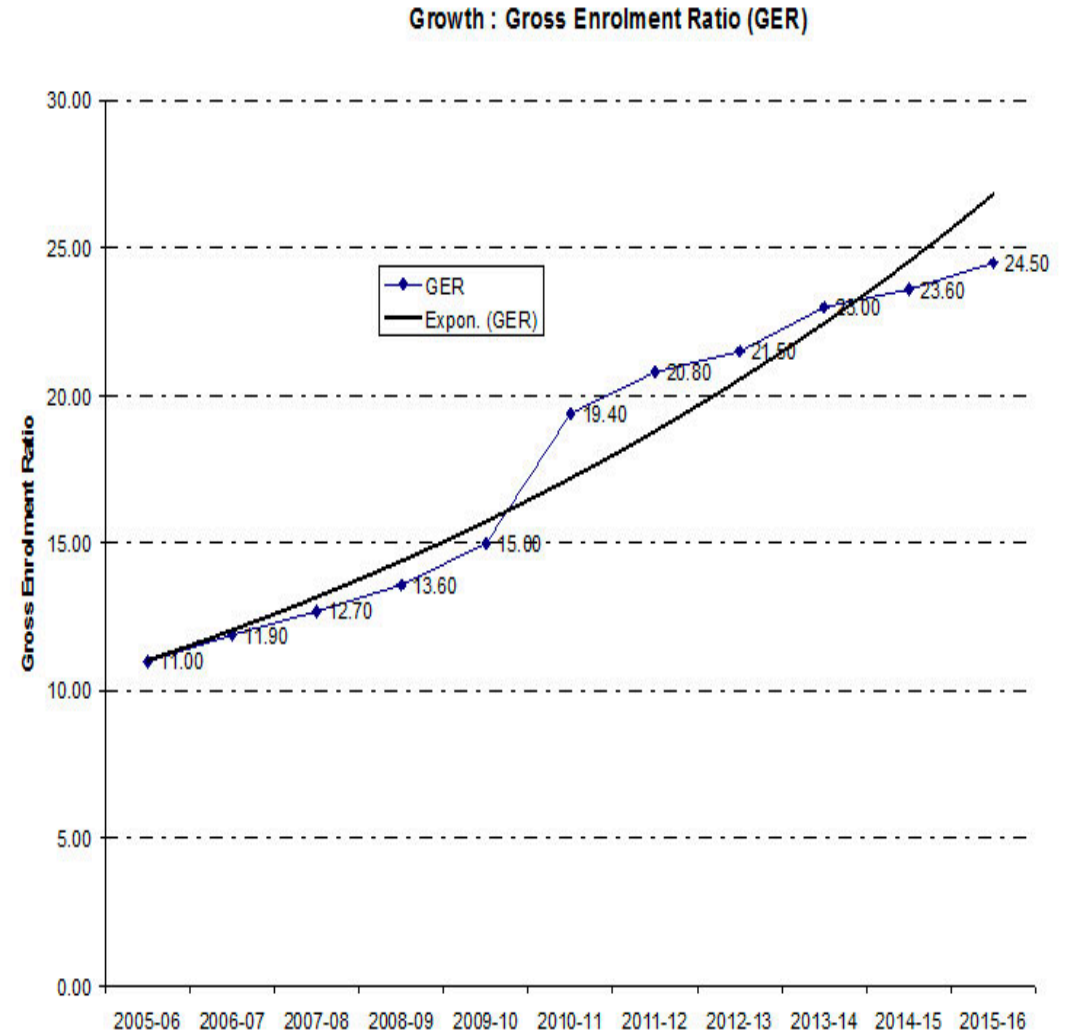
Population by Education Level (2006-20)



Growth of Tertiary Education in India

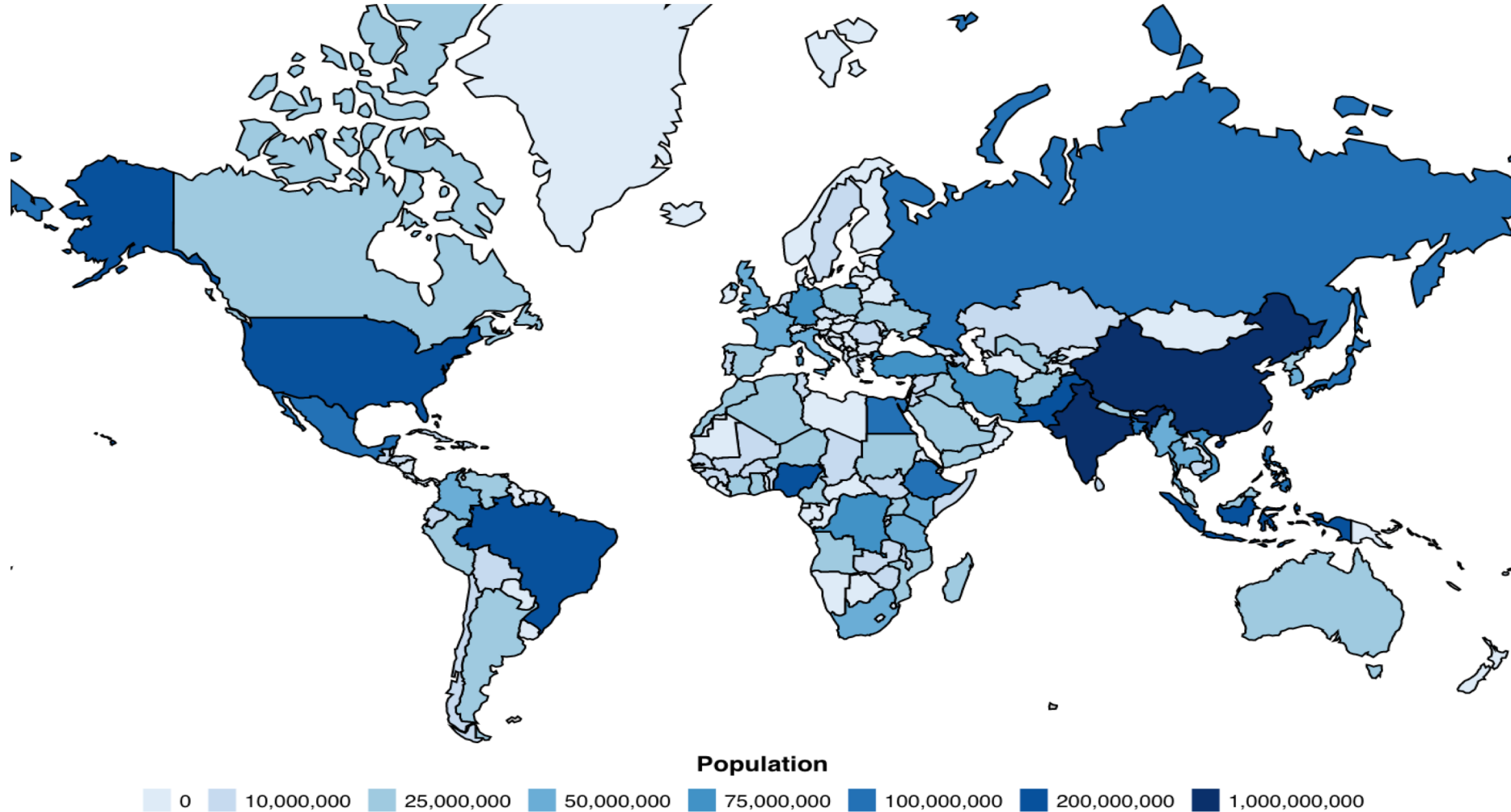


Source: UGC, India



World's Population – At Glance

Total Population by Country 2022





World's Population – At Glance

China & India having populations of well over a billion. The US comes in third with just under 325 million residents. The BRIC countries, regarded as the 4 major emerging economies expected to dominate in the 21st century, are all in the top ten most populous countries, indicating how important the sheer size of their populations are to their economic expansion.

However, a number of countries considered by the IMF to be developing countries (that is, having not achieved a high degree of industrialization relative to their populations, and where the population typically has a medium to low standard of living) also have sizeable populations, including Nigeria, Bangladesh and Mexico demonstrating that the issues affecting developing nations span multiple continents.

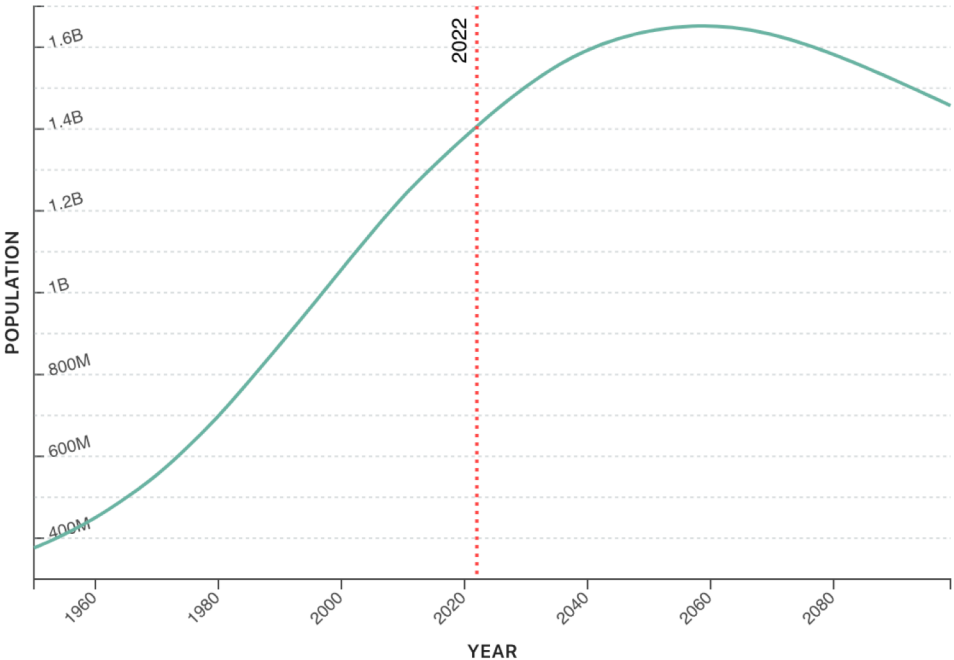
It is notable that a number of the largest economies in the world have smaller populations, particularly in Europe. The UK, Germany, France and Italy are all among the top ten largest economies and all have populations of under 100 million.

Furthermore, several extremely small countries, such as Monaco, Luxembourg and the Cayman Islands, all with fewer than a million residents play a much larger role in the financial world than their population numbers would suggest. In contrast, Canada, which is also a major economic player and one of the largest countries in the world by landmass, has a relatively small population for its size, with around 36.5 million residents.

Population Trend in India

India Population 2022 (Live)

1,405,945,268



India’s population growth rate has declined significantly over the past few decades, attributed to growing urbanization, rising education levels, specifically among women, and increasing alleviation of poverty.

India is expected to reach its peak population of 1.65 billion people by 2060, after which it will begin to decrease. The number of children in India peaked over a decade ago and is now decreasing.

The growth and expansion in tertiary education, decline in population growth and demographic transition would lead to domestic demand supply mismatch, hence going global could be a potential solution

Rank	Country	2022 Population	2021 Population	Growth Rate	Area	Density (km²)
2	India	1,406,631,776	1,393,409,038	0.95%	3,287,590	428/km²

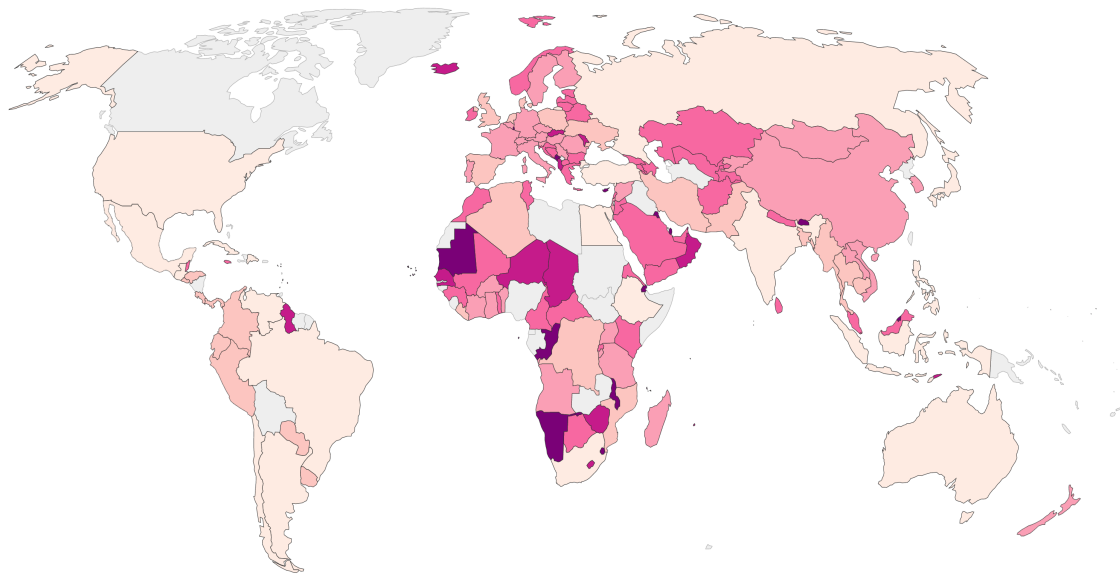


International Mobility of Students

International Mobility of Students

Share of students studying abroad, 2013

Number of students from a given country studying abroad as a percentage of the total tertiary enrollment in that country.

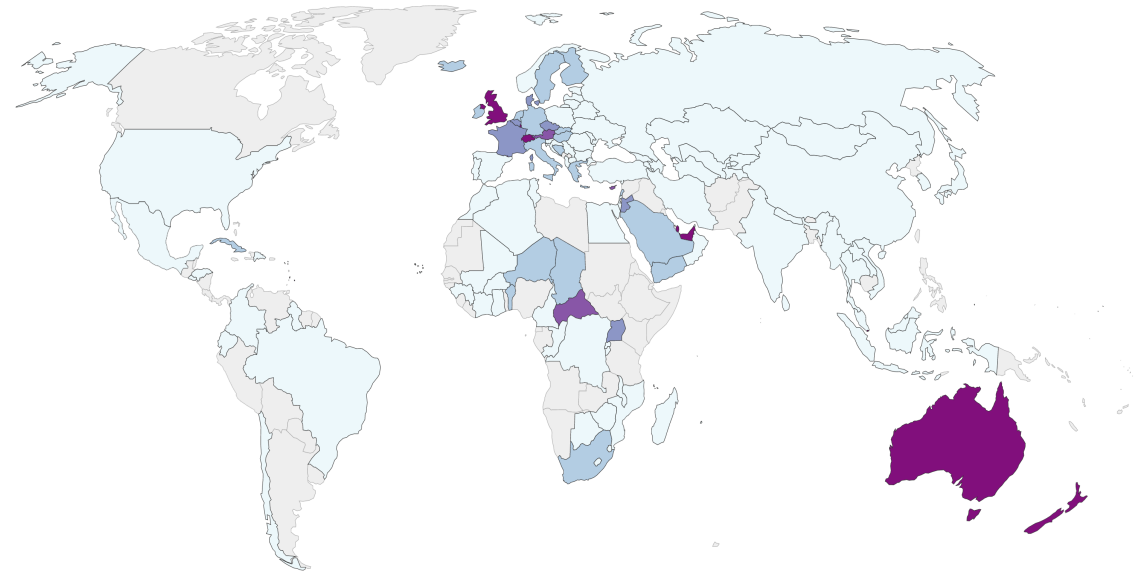


Source: UNESCO Institute for Statistics

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Share of students from abroad, 2015

Share of students from abroad studying in a given country out of the total tertiary enrollment in that country.

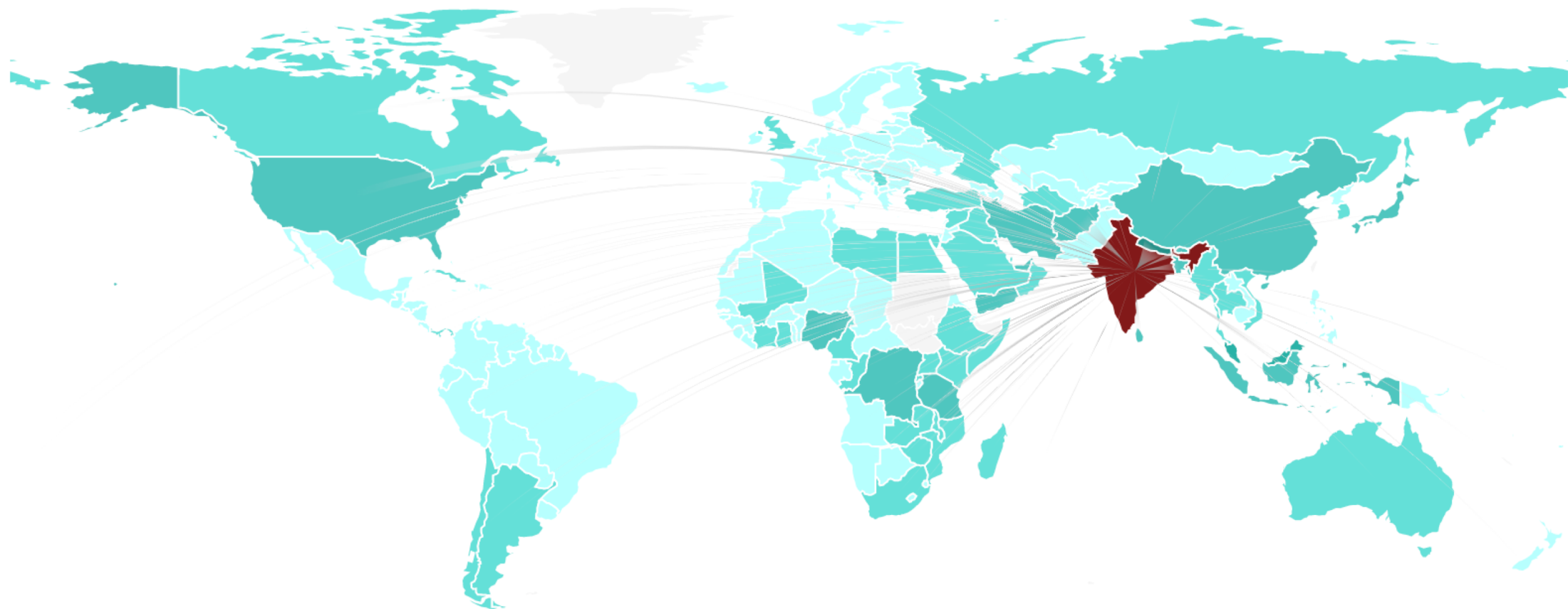


Source: UNESCO Institute for Statistics

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International Mobility of Students – India

Where do students come from

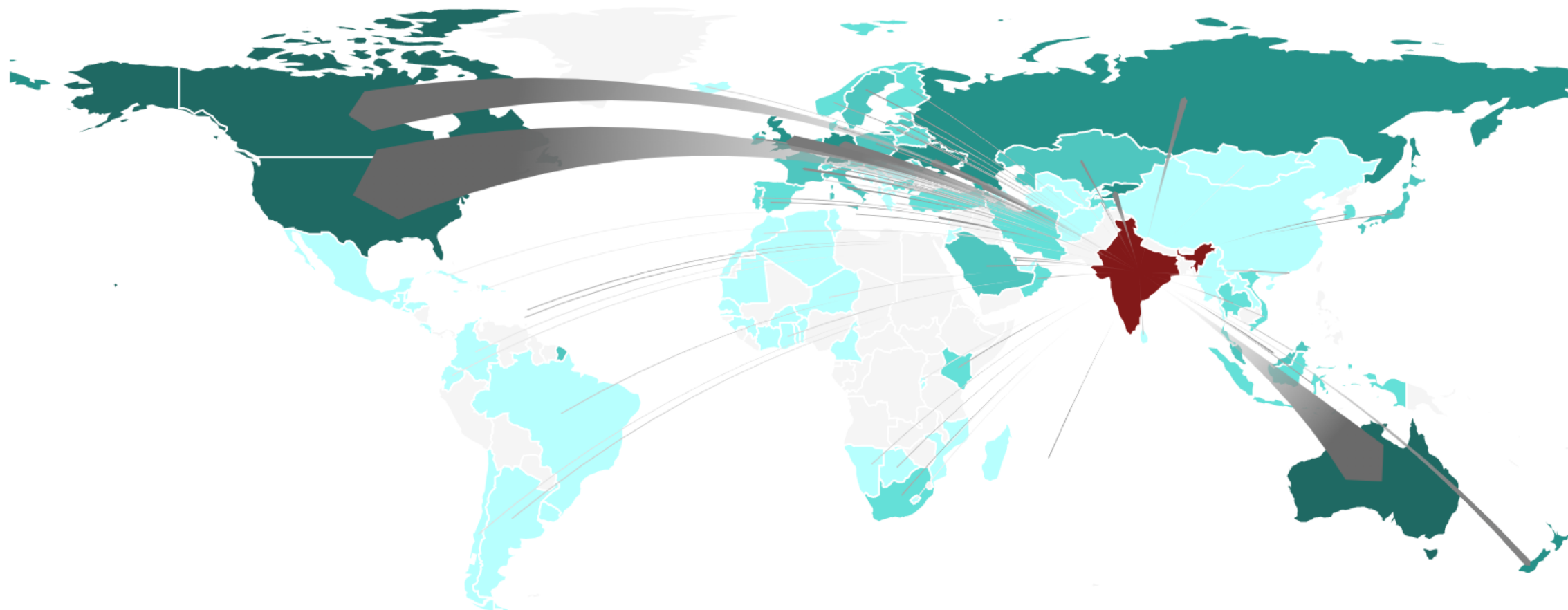


Internationally mobile students:



International Mobility of Students – India

Where do students go



Internationally mobile students:



International Mobility of Students

Top 10 Countries

India							
Country of Origin			Destination Country			Key Indicators	
Where do students come from	47,008		Where do students go	0			
Countries	Students	%	Countries	Students	%		
Nepal	13,883	30%	United States	1,33,321	29%	Students abroad:	
Afghanistan	4,504	10%	Australia	93,324	20%	Total number of mobile students abroad	4,61,792
Bangladesh	2,258	5%	Canada	74,340	16%	(% of total mobile students)	7.6
Bhutan	1,851	4%	United Kingdom	27,300	6%	Outbound mobility ratio	1.3
United States	1,626	3%	Germany	18,574	4%	Gross outbound enrolment ratio	...
Nigeria	1,525	3%	Ukraine	14,383	3%		
Yemen	1,437	3%	New Zealand	12,281	3%	Students hosted:	
Malaysia	1,353	3%	Russian Federation	12,105	3%	Total number of mobile students hosted	49,348
United Arab Emirates	1,347	3%	Kyrgyzstan	10,749	2%	(% of total mobile students)	0.8
Sri Lanka	1,168	2%	Georgia	6,832	1%	Inbound mobility rate	0.1

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... : missing data
n : nil or negligible
a : not applicable



The Power of 3

- Institutions
- Students
- Shared Objectives

Rethinking: A new agenda for university and tertiary education system leaders?

- Demographic strategy
- International mobility
- Competitive intensity
- Talent positioning
- Corporate strategy
- Social objectives
- Entrepreneurial spirit
- Ranking objectives
- Eco system

Areas stand out for special attention

In this fast-changing world, universities and higher education systems must:

- get clearer on their strategy and sources of distinctiveness
- think through options to expand the reach of the system (including access and affordability, as well as global and online)
- examine every aspect of the economic model to ensure they are viable and sustainable overtime
- graduation and retention rates across all student populations to be increased
- if relevant, boost research excellence and commercial productivity
- develop eco system for entrepreneurial development
- work more closely with employers and governments to prepare students for work in ways that bolster the country's competitiveness



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