

Sri Lanka

Market Profile 2011 - 2012

May 2011



1. Introduction

New Zealand education providers wishing to enter or expand into the Sri Lankan market will find good opportunities for recruiting students who have completed their education at leading Sri Lankan schools (both government-run and international) and top Sri Lankan universities.

Study abroad is very popular among Sri Lankan students at under-graduate level, with 60% choosing to study overseas.

However, the Sri Lankan education market is challenging and requires sustained marketing and promotional effort. New Zealand's main competitors are the United States of America, the United Kingdom and Australia.

While the number of Sri Lankan students studying in New Zealand is low (362 in 2010), significant growth has been recorded over the last three years. From 2007 to 2010 there was an overall 175% increase.

2. Economic Profile

Some quick facts:

Population	20.9 million
Official Languages	Sinhala (Singhalese) and Tamil
Largest City	Colombo
Capital City	Sri Jayawardenapura Kotte
Currency	Sri Lankan Rupee (LKR)
GDP per capita	US\$48.24 billion
GDP per capita (PPP)	US\$5,104 billion
GDP growth	7%
Inflation	6.5%

Source: Wikipedia & Economist Intelligence Unit (EIU) country report

The civil war with the Liberation Tigers of Tamil Eelam (LTTE) ended in May 2009. Since then, the Government, under the leadership of President Rajapaksa, says it is committed to the overall economic development of Sri Lanka. All travel advisories for Sri Lanka are now clear, therefore institution representatives can easily plan travel to the country. At the time of writing the New Zealand travel advisory was clear, but this can be checked at <http://www.safetravel.govt.nz/destinations/srilanka.shtml>

3. Local Education System

Reform of the education system is urgently needed: There are shortages of teachers in key subjects such as English (especially in rural areas), and there are concerns about declining standards.

Furthermore, there is some political opposition to the emerging spread of privatisation as a way of addressing the lack of access to higher education, information technology and English language.

4. General Advice for New Zealand Education Providers

There is high demand for an overseas education among the Sri Lankan middle class or families who can afford it.

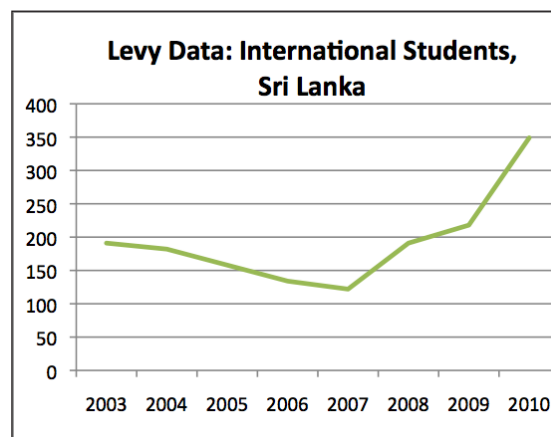
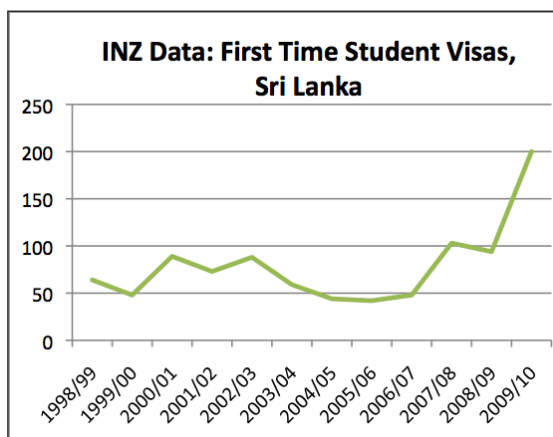
Generally speaking, the quality of tertiary education providers in Sri Lanka are not considered of very high repute, which in turn increases this interest in foreign qualifications.

New Zealand institutions need to specifically target students graduating from top schools (both government-run and international) as well as top universities.

Students are taught in English, and most of the top schools and universities are located in Colombo and Kandy.

When recruiting students, New Zealand tertiary providers need to thoroughly verify the academic certificates and degrees that students provide.

It is recommended that New Zealand education providers visit Sri Lanka to meet and work with good, experienced education agents. Education New Zealand has formed a group of accredited New Zealand Specialist Agents (NZSA) for Sri Lanka. These agents have gone through rigorous quality checks and assessments. Their contact details can be found online at www.nzeducated.com/nzsasl



*The Department of Labour (INZ - Immigration New Zealand) and The Ministry of Education provide regular updates to the Visa and Export Education Levy Statistics. The latest statistical information can be found at www.educationnz.org.nz/policy-research-stats/statistics

5. Sector-Specific Advice for New Zealand Education Providers

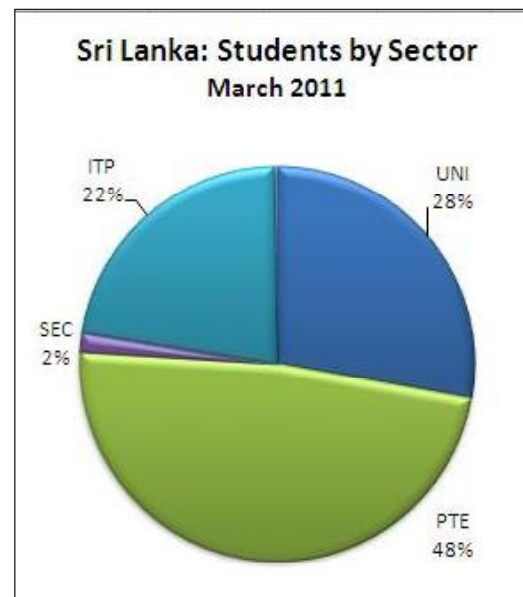
5.1 Undergraduate and Postgraduate Courses

Sri Lanka has 13 universities that provide tertiary academic courses. All are state funded.

Education provided by state-funded institutions from primary school to undergraduate study is free. Students applying to state universities are admitted only on the basis of results of the Sri Lanka GCE A levels.

There are a limited number of private institutions which have successful twinning (partnership) arrangements with overseas tertiary educational institutions and universities.

The tertiary market is very promising for New Zealand tertiary education providers. There is great demand for undergraduate study, with nearly 60% of students opting for these studies overseas.



(UNI=Universities; PTE=Private Training Establishments; SEC=Secondary; ITP= Polytechnics)

5.2 Vocational and Technical Qualifications

There are very few vocational training institutes in Sri Lanka. Therefore, there may be some opportunities for New Zealand education providers to provide vocational training in Sri Lanka.

5.3 Secondary Schools

There are three types of schools in Sri Lanka: Government schools, international schools, and Pirivena schools or Buddhist Centres of Higher Learning. There are very limited, if any, opportunities in Sri Lanka for New Zealand Secondary Schools.

5.4 English Language

There is very little opportunity for English language schools in Sri Lanka, since most students are taught in English at school from an early age. Anecdotally speaking, the quality of English seems to have deteriorated in recent years. English language use varies greatly; some students may consider taking supplementary English training to what they receive at school.

6. Future Trends in the Market

The market for tertiary education is expected to continue growing over the next three to five years.

The USA, the UK, and Australia will continue to remain popular destinations because of increased promotional activity and enhanced public perception.

Australia suffered a minor blow to its student numbers in 2010 due to much publicised racial attacks on Asian students. Other overseas destinations such as Canada, Singapore, Malaysia, India and Korea are expected to increase their presence and marketing in Sri Lanka in line with what they are doing in other Asian countries.

Government programmes and spending on primary, secondary and vocational education and training are expected to increase.

Education reforms may be introduced progressively over the next three to five years, opening up other areas of collaboration between New Zealand and Sri Lankan institutions.

7. Competitor Activity & Statistics

IDP Education Australia, the British Council and the US Education Foundation of Sri Lanka (USEFSL) have Sri Lankan offices based in Colombo.

Education New Zealand holds two major promotional events in Sri Lanka annually: a New Zealand pavilion at the annual EDEX Fair in Colombo (around January) and a PACE New Zealand Education Fair (around September).

8. Helpful Hints

- Careful research is necessary to determine prospects.
- The business community is conservative in dress and outlook.
- There are a large number of public holidays in Sri Lanka, it would be best to check these online www.worldtravelguide.net/sri-lanka/public-holidays before planning your itinerary.
- Phone calls and faxes from hotels are expensive, hiring a car and local driver can be useful.
- New Zealand passport holders are able to travel to Sri Lanka without a visa under the visa waiver system, however some prefer to obtain a business visa for marketing trips. The Sri Lankan Consulate in Wellington doesn't seem to have a website, but they can be contacted via the following details:

Consulate of the Democratic Socialist Republic of Sri Lanka, Wellington
32A Izard Road, Khandallah, Wellington 6035
Phone: (04) 976 8434
Fax: (04) 976 8435
Email: slconsulnz@paradise.net.nz

Or check the MFAT website for contact details, at
<http://www.mfat.govt.nz/Embassies/2-Foreign-representatives-to-NZ/0-dip-cons-list.php?country=Sri%20Lanka&emb=2>



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