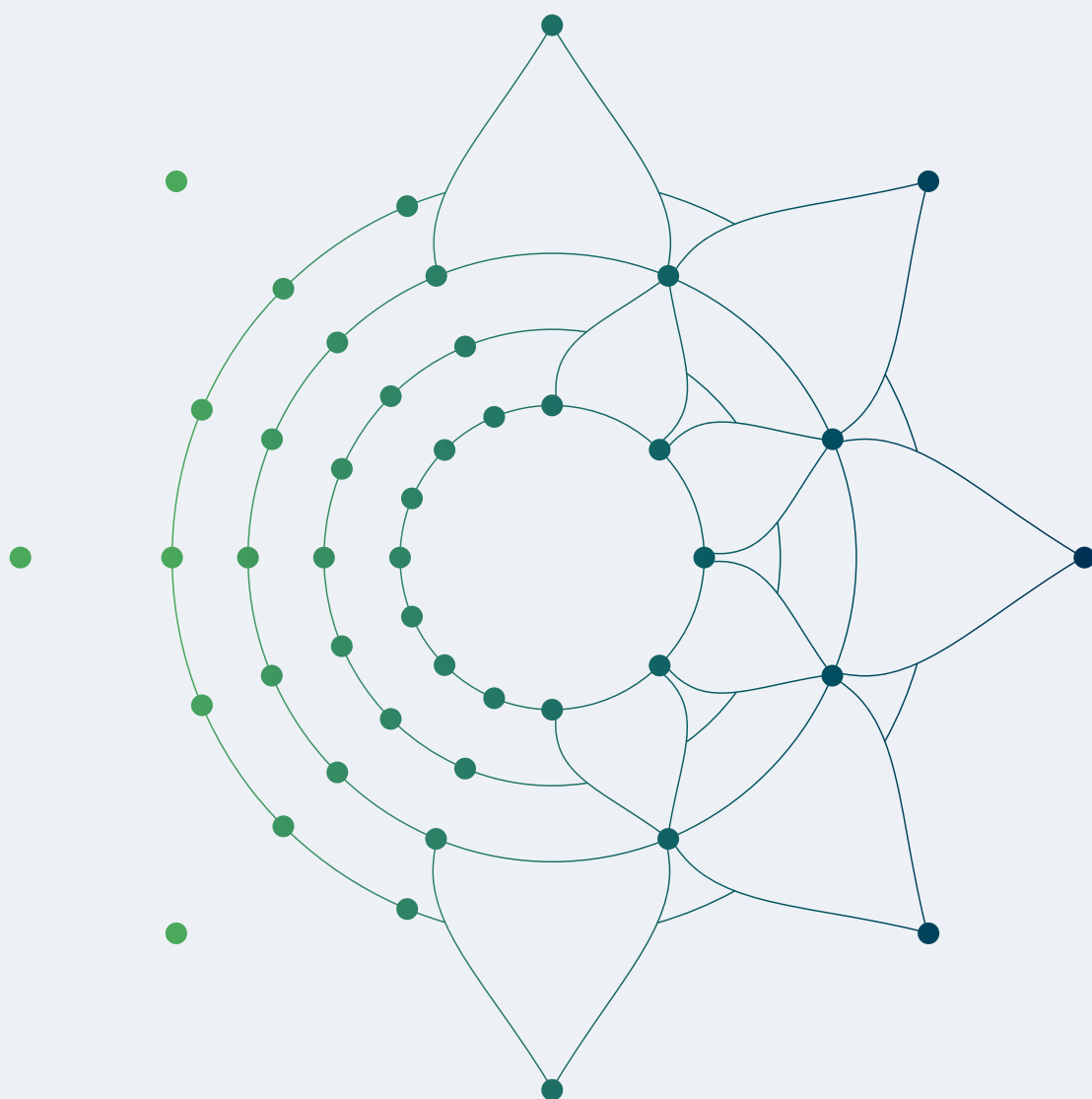




Australian Government
Department of Foreign Affairs and Trade



AUSTRALIA'S INDIAN DIASPORA: A NATIONAL ASSET

MAPPING THE COMMUNITY'S REACH INTO THE AUSTRALIA- INDIA ECONOMIC RELATIONSHIP

MARCH 2022

EXECUTIVE SUMMARY

Australia and India benefit from a long-standing relationship, with deep people-to-people links. As India celebrates its 75th anniversary of independence in 2022, a generation of skilled migrants, professionals and students make the Indian diaspora Australia's fastest growing large diaspora. The community has grown five-fold in the past 20 years. India has been the largest source of new Australian citizens for the fifth year running. As of 2020, Indian migrants became the second-largest group of overseas-born residents, at over 721,000. Projections made pre-COVID-19 suggested Australia's Indian-born population would reach 1.07 million by 2035.

The Indian diaspora community is active across all aspects of Australian life, including in business, politics, the judiciary, government, civil society, academia, science, the arts and sport. During challenging times, the community has shown a great sense of civic responsibility and resilience. Community groups provided support to people in need amid Australia's bushfire crisis and community leaders helped disseminate accurate information during the height of the COVID-19 pandemic. The community's contributions to Australia's social cohesion are highly valued.

The Indian diaspora community is also recognised for being a rich source of dynamism and enterprise. As Australia's ties with India continue to gain ground, a range of Indian diaspora networks have demonstrated their readiness to contribute further their expertise and entrepreneurialism to the economic relationship. Diaspora community groups are disparate and diverse, reflecting the plurality of Indian society, and no group can speak for the Australian Indian diaspora as a whole. Many have the connections, language skills and know-how relevant to understanding India's complex markets and influencing Australia's perception within them. The focus of this report is to develop a better understanding of the Indian diaspora's reach into the Australia-India economic relationship.

In recent years, India has emerged as one of Australia's most significant strategic and economic partners, with two-way trade and investment roughly doubling between 2014 to 2019. In 2020, as Prime Ministers Morrison and Modi elevated the relationship to the level of a Comprehensive Strategic Partnership, India was Australia's seventh largest trading partner, with two-way trade valued at \$24.3 billion, and our sixth largest goods and services export market, valued at \$16.9 billion. India was Australia's third largest services export market.

The Australian Government endorsed *An India Economic Strategy to 2035: Navigating from potential to delivery* (IES) in 2018 as a roadmap for deeper economic integration with India. The IES identified that there is no market with more growth opportunities out to 2035 for Australian business than India, that a step-change is needed in the economic partnership led at the highest levels of government and business, and that a deeper understanding is required of the magnitude of what is unfolding in the Indian marketplace.

As the Indian Australian community continues to achieve greater influence across business and politics, one of the key recommendations of the IES was to support diaspora-focused connections between Australia and India in trade, investment and innovation. As a result, this report aims to set out an evidence base, exploring the Indian diaspora networks with the greatest capacity to contribute to the Australia-India trade and investment relationship. It is the first of its kind and signals the value the Australian Government places on nurturing our deep people-to-people ties.

This report's key findings are as follows:

- Reflecting its energy and aspiration, Australia's Indian-born population is on average younger, has higher educational attainment and earns greater income than the general population. It is Australia's second-largest tax-paying diaspora.
- The geographic distribution of the Indian diaspora broadly reflects Australian demographics, with around 70 per cent located in Victoria and New South Wales.
- The Indian diaspora is represented disproportionately in a number of high-skill occupations, including in technology-enabled areas with skills shortage and export potential.
- The Indian diaspora is well represented in the Australian business community. Based on a 2021 snapshot of company data, people of Indian heritage are employed as directors and managers in at least 996 Australian organisations. Within those organisations, there are an estimated 2,840 directors and managers of Indian heritage out of a total of over 20,730 working in Australia. This corresponds to over 13 per cent of the total, while the diaspora represents approximately 3 per cent of the Australian population overall. Of the directors and managers of Indian heritage, 12.5 per cent are women, as compared to 9.3 per cent of the total.
- Among the cohort of 2,840 directors and managers of Indian heritage, this report finds a subset of 964 have strong potential to influence trade and investment with India. This subset's representation is high in several sectors of significance to the relationship with India, including health, tourism, ICT and resources, across companies representing over \$250 billion in annual turnover. However, it is proportionally lower in the education and agribusiness sectors, despite their importance to the relationship.
- Across Australia, the representation of people of Indian heritage in senior academic roles

at lecturer level and above in universities is increasing, having grown from 1.75 per cent in 2016 to 1.92 per cent in 2020.

- A growing number of business-focused and professional networks are emerging among the Indian diaspora. These vary widely in their online presence.

Empirical evidence for the trade effects of migration is developing. But the cumulative effect of a youthful, linguistically diverse and growing community that is generally highly educated, plugged into networks of innovation, and well represented in business, across services and STEM sectors with strong export potential, suggests Indian diaspora networks represent important contributors not only to trade and investment with India, but also to Australia's international competitiveness.

This report's findings suggest a range of focus areas for discussion with the Indian diaspora community to better enable its contributions to the future of the economic partnership with India, including exploring:

- how new business opportunities can be unlocked, drawing on networks of diaspora talent;
- how government-led bilateral trade and investment initiatives can be promoted across diaspora business networks;
- how diaspora 'business champions' can be supported to provide advice on successful models of operating in the Indian market, navigating risks and interpreting business culture; and
- how emerging talent in the Indian diaspora can be showcased across the business community.

The research presented in this report will inform further discussion and collaboration with Indian diaspora networks as well as the consideration of strategies to better target diaspora engagement and grow ties between Australia and India.

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INTRODUCTION

BACKGROUND

In recent years, India has emerged as one of Australia's most significant strategic and economic partners.

Prime Minister Morrison and Prime Minister Modi elevated the relationship to a Comprehensive Strategic Partnership (CSP) in June 2020, boosting bilateral cooperation and efforts to shape an open, inclusive and resilient Indo-Pacific. The CSP is underpinned by a range of practical initiatives to expand trade and investment, as well as increasing cooperation in defence, maritime safety and security, cybersecurity, critical minerals, water resources, skills and governance, geoscience and space. Under the CSP, Australia and India are also discussing a Migration and Mobility Partnership agreement,

including to facilitate the mobility of students, academics and researchers and other immigration streams. Importantly, the CSP emphasises the role Australia's Indian diaspora plays in enriching all aspects of the bilateral relationship.

The fundamentals of the Australia-India economic partnership are sound. Two-way trade and investment roughly doubled from 2014 to 2019. In 2020, India was Australia's seventh largest trading partner, with two-way trade valued at \$24.3 billion, and sixth largest goods and services export market, valued at \$16.9 billion. In 2020, India was Australia's third largest market for services exports.

AN INDIA ECONOMIC STRATEGY TO 2035

An India Economic Strategy to 2035: Navigating from Potential to Delivery (IES) was endorsed by the Australian Government in 2018. This Strategy set out a roadmap to help transform Australia's relationship with India out to 2035; it aimed to enhance understanding of India's trajectory and take the economic partnership to a new level.

In light of changed geopolitical and economic circumstances, including the impacts of the COVID-19 pandemic, an *Update to the IES* was conducted by the Australian Government based on extensive consultations in 2021, setting out a plan to steer engagement over the next five years.

Figure 1: India Economic Strategy growth targets for exports and outbound investment



Source: DFAT (2018)

The IES prioritised 10 economic sectors, including education, agribusiness, resources and tourism, as well as health, financial services, energy, infrastructure, science and innovation and sport.

The IES also recognised the complexity of India's operating environment. For instance, each of India's state economies has distinct growth drivers, regulatory regimes and investment climates, requiring granular strategies for doing business.

Emphasising the importance of diaspora-focused connections between Australia and India, the IES characterised the Australian Indian diaspora community as a national asset.

In doing so, it acknowledged that many Indian diaspora groups in Australia have the expertise, language skills, networks, entrepreneurial potential as well as deep interest to 'open doors, help navigate Indian business culture, enhance the community's understanding of contemporary India and contribute to Australian public diplomacy in India.'

The Australia Economic Strategy, India's industry-led counterpart to the IES launched in December 2020, similarly acknowledged that the 'relationship between the two countries is significantly determined by people-to-people ties.'

PURPOSE OF THIS REPORT

Australia's Indian diaspora community makes strong contributions across all walks of Australian life, including during challenging times, such as Australia's bushfire crisis and the height of the COVID-19 pandemic. These contributions are acknowledged and deeply valued.

This report addresses Recommendation 89.3 of the IES to conduct a diaspora industry and research mapping exercise. The Australian Indian diaspora is disparate and diverse, reflecting the plurality of Indian society. Given this, there is no one business or community group that can speak for the Australian Indian diaspora and this exercise does not seek to encompass the Indian diaspora as a whole. Its primary purpose is to set out an evidence base, exploring the reach of Indian diaspora groups into the bilateral economic relationship.

More broadly, the importance of enabling Australia's Asian diaspora communities has been widely acknowledged, including in work published by Asia Society - A Forgotten Advantage: Enabling Australia's Asian-Australian and Diaspora Communities (2020) - and the Australian Council of Learned Academies - Australia's Diaspora Advantage: Realising the potential for building transnational business networks with Asia (2016).

As Australia's 2017 Foreign Policy White Paper outlined:

The Government is committed to working with diaspora communities...These communities often have the connections, language skills and cultural understanding to assist Australia to deepen ties with other countries. They help to facilitate trade and investment, including by sharing information on overseas markets and customs. Diaspora communities can also influence how Australia is perceived internationally.

This report represents an Australian Government initiative to develop a better understanding of the networks within Australia's Indian diaspora community that have the greatest capacity to contribute to the Australia-India trade and investment relationship. It is anticipated this report will inform future collaboration with the Indian diaspora community and the consideration of diaspora engagement strategies.

ABOUT THIS RESEARCH

This report is underpinned by research conducted by PwC. The research adopted desktop methods and consultations according to the following approach:

- **Data identification** – data series relating to the Indian diaspora in Australia by industry and geography as well as bilateral trade and investment statistics were identified and collected.
- **Data cleansing and analysis** - datasets were reviewed and cleansed before bringing together relevant data sources and identifying limitations.
- **Opportunity identification** - insights from the data relating to the Indian diaspora's sectoral and geographic spread, industry concentration and level of connectedness were drawn out in light of bilateral trade and investment trends.
- **Validation** - the analysis and insights were tested with subject matter experts on India and across sectors, including diaspora members.

Table 1 sets out the key datasets used to develop this report and their limitations. As there is no single authoritative record of the cultural background of Australian entities engaged in trade and investment with India, the research relies on a combination of datasets and assumptions, each with associated limitations.

Census data are drawn on to provide an overview of the Indian diaspora's demographics and trends. While the Census collects ancestry data, there is also a strong focus on country of birth, and this report relies on both sets of data. A focus on the Indian-born population is justified by the

strong growth of this sub-group in Australia in recent years.

The research also relies on a sample drawn from the Orbis database of company directors and managers who self-identified as having Indian ancestry and on data capturing the number and spread of senior academics of Indian heritage in Australian universities. All data presented has been anonymised to protect privacy.

This report does not claim to represent an exhaustive record of the Indian diaspora's contributions to the Australian economy or the Australia-India economic relationship. Rather, it presents a snapshot of the Indian diaspora community's potential reach into trade and investment with India. There are myriad tangible and intangible contributions this research does not capture. Although every attempt has been made to apply rigorous methodology and assumptions in this research, the figures quoted in this report should be regarded as indicative.

Finally, given the approach adopted, this report does not delve into questions regarding the determinants of firm-level decisions, the motivations of Indian diaspora groups in their economic contributions to the relationship and the obstacles they experience. These questions fall outside the scope and methodology of this report, which is expected to inform broader collaboration with the Indian diaspora community and the consideration of diaspora engagement strategies.

STRUCTURE OF THIS REPORT

The remaining chapters of this report are:

- **Chapter 2: The Indian diaspora in Australia** - overview of the Indian diaspora's demographics.
- **Chapter 3: A snapshot of diaspora groups' economic contributions** - analysis of company directors, managers and senior academics of Indian heritage in terms of their potential influence to drive trade and investment with India.
- **Chapter 4: Focus areas for discussion** - points that could inform discussions with Indian diaspora networks exploring how to enable better their contributions to the bilateral economic relationship.

Table 1 : Data sources used and associated limitations

Data source	Description	Limitations
ABS	Population, employment, industry and geographic distribution information.	<p>The Census is conducted every five years and the most recent data available is from the 2016 Census.</p> <p>For the purposes of this report, the Indian diaspora includes Indian-born residents and those born in Australia or third countries who claim Indian ancestry. While the Census collects ancestry data, there is a strong focus on country of birth. A focus on the Indian-born population is justified by the strong growth of this sub-group in Australia in recent years.</p>
The Orbis database of company information, by Bureau van Dijk, a Moody's Analytics Company	<p>The Orbis database has been created by synthesising and standardising data collected from more than 170 providers worldwide.</p> <p>It contains information about directors and managers which allows the identification of people of Indian ancestry. It details location, financial information and ownership.</p> <p>Orbis uses the operating revenue, value of assets, and number of employees to define the size of companies. This research adopts the Orbis definitions, including classifying 'large enterprises and corporations' as having operating revenue of 10 million euro or greater and assets of 20 million euro or more, as well as 150 or more employees, and 'entrepreneurs and SMEs' as having less than 10 million euro in operating revenue, 25 million euro in assets and 150 employees.</p>	<p>These data are limited to information disclosed by companies.</p> <p>Companies that operate in Australia were included even if none of the directors who listed Indian ancestry listed Australian residence. For these purposes, it is reasonable to assume they have the potential to contribute to Australia-India trade and investment even if their current residence is not in Australia.</p>
LinkedIn	LinkedIn Interests have been collected for members of the Indian diaspora identified in the Orbis database. Network analysis was conducted across the diaspora members and key companies, groups and education providers.	This networking analysis relied on diaspora members of interest having identifiable LinkedIn pages with the mention of at least one company that was captured by the Orbis database.
Department of Home Affairs	Migration data and figures on visas granted.	It is difficult to capture comprehensively transitions between visa types, including temporary to permanent status.
Department of Foreign Affairs and Trade	Trade and investment statistics.	Data on trade in services is published at an aggregate level and do not match priority sectors identified in the India Economic Strategy.
Department of Education, Skills and Employment	International student data and data on academics and researchers employed by Australian universities.	The data on academics and researchers is limited to information disclosed by universities.

THE INDIAN DIASPORA IN AUSTRALIA

KEY POINTS

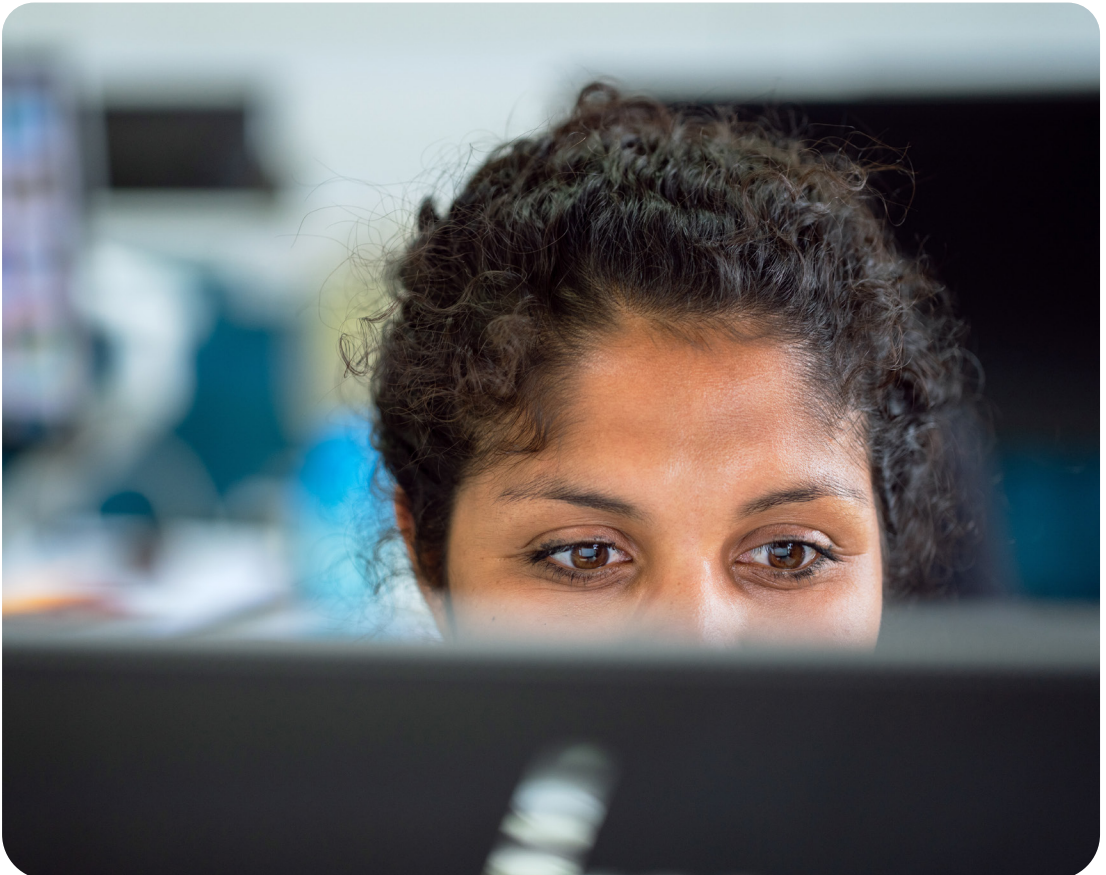
- Australia's Indian-born population is on average younger, has higher educational attainment and greater earnings than the general population.
- The diaspora community is linguistically diverse and well represented in business, across services and STEM sectors with strong export potential.
- Indian diaspora networks represent important contributors not only to trade and investment with India, but also to Australia's international competitiveness generally.

We define diaspora communities as those composed of people, including migrants and their descendants, who live outside but maintain connections to their shared country of origin or ancestry.

Australia's Indian diaspora community comprises residents who claim Indian ancestry, whether they

were born in Australia, India or third countries, including permanent residents, Australian citizens, international students and temporary workers.

In the 2016 Census, 675,658 people claimed Indian ancestry, representing 2.8 per cent of the Australian resident population.



RECENT TRENDS IN INDIAN IMMIGRATION

There is a long history of Indian immigration to Australia, but as with the experience of comparable countries such as the United States and Canada, immigration from India grew to larger volumes in the 1980s and 1990s, driven by highly skilled Indian professionals. Under Australia's skilled migration program, many of these immigrants pursued work in Australia's emerging knowledge economy and were highly skilled in computer science, engineering and information technology.

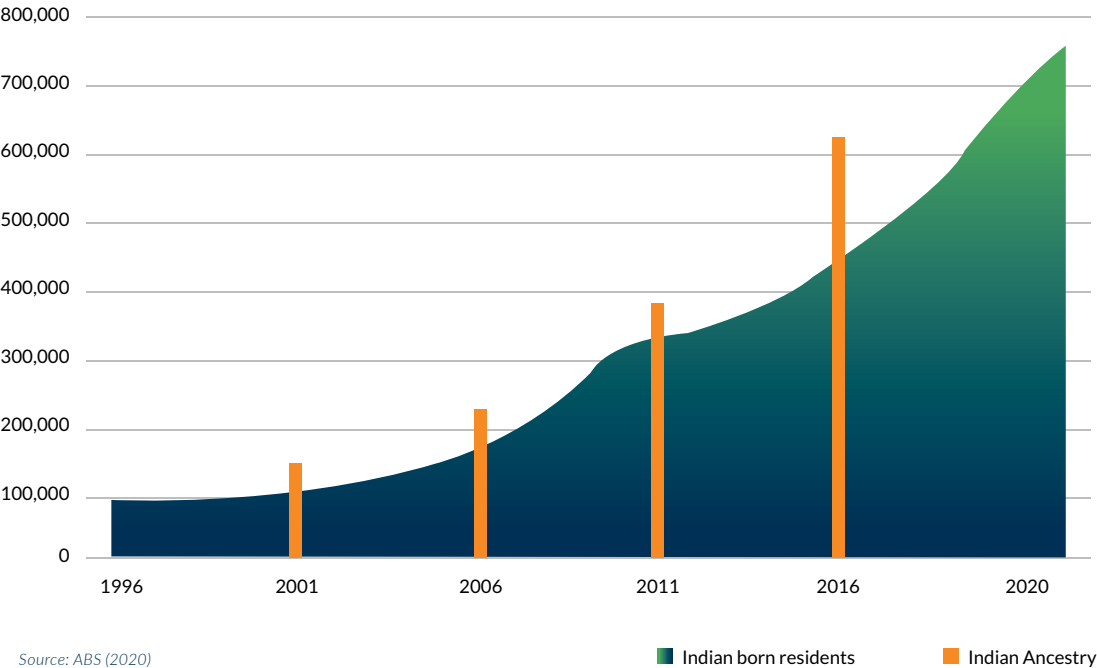
Indian immigration to Australia has expanded significantly since 2000, as illustrated in Figure 2. While the number of Indian-born residents in Australia roughly doubled between 1996 and 2006, it has more than quadrupled between 2006 to 2020. Today, the Indian diaspora is Australia's fastest growing large diaspora community and the Indian-born population became Australia's second-largest overseas-born migrant group behind the UK-born at 721,050-strong in 2020.

The ABS projects Australia's Indian-born population will reach 1.07 million by 2035 and 1.4 million by 2045 (but these projections do not account for impacts of the COVID-19 pandemic).

While it is generally assumed that subsequent generations might have weaker ties to India than first-generation immigrants, India's growing economic and strategic significance, its soft power potential and its policies engaging overseas Indians suggest subsequent generations may retain substantial links relevant to the bilateral economic relationship. For example, the Indian Government has continued to simplify the rules around holding Overseas Citizenship of India, which grants life-long multiple-entry visas and economic rights to individuals that can establish up to a third-generation tie to a former Indian national.

India was Australia's largest source of skilled migrants in 2019-20 and Australia's second largest source of international students in 2019-20. Compared to the proportion of established professionals migrating in the 1980s and 1990s, the composition of Indian immigration has changed in recent years. The distribution of Indian-born visa holders across various visa streams over the past decade is shown in Figure 3.

Figure 2: Estimated population of Indian-born residents and those claiming Indian ancestry, 1996-2020



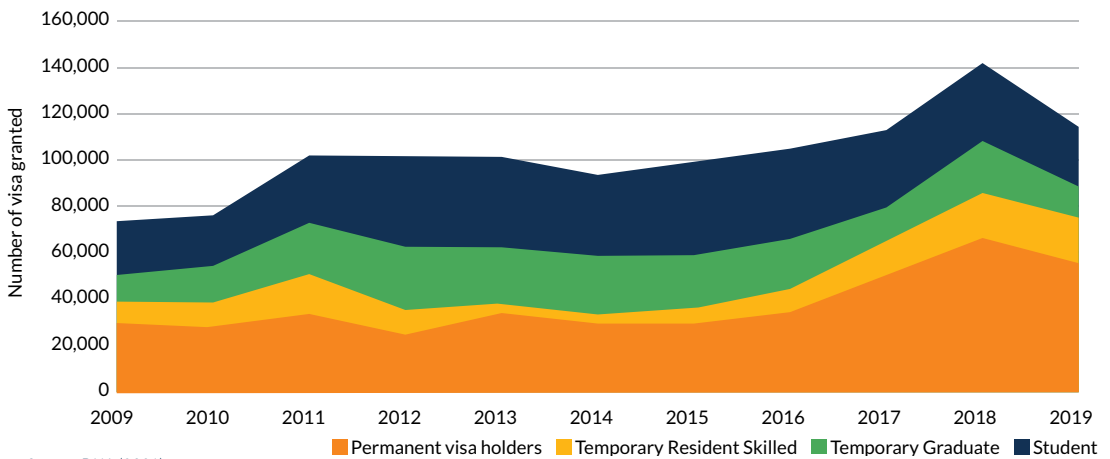
A greater share of Indian migrants over the past decade have arrived as temporary skilled workers or as international students. Between 2015-16 to 2018-19, the average annual growth in Indian students enrolling in Australian courses was 25 per cent. India has remained the largest source for new Australian citizens for five consecutive years from 2015-16 to 2020-21.

Empirical evidence for the trade effects of migration is developing, but suggests that diaspora communities can enhance trade by building business ties, improving the quality of

information flows and reducing the costs of trade and investment. As such, the Indian diaspora community can not only raise awareness of opportunities available in India and help Australian businesses navigate the operating environment, but it can also attract businesses and individuals to trade with Australia, helping source the inputs that will support Australia's productive capacity and the products that will benefit Australian consumers.

India has remained the largest source for new Australian citizens for five consecutive years from 2015-16 to 2020-21.

Figure 3: Visas granted to the Indian-born by visa stream, 2009-10 to 2019-20



CASE STUDY: THE GLOBAL TALENT VISA PROGRAM

The Department of Home Affairs established the Global Talent visa program in November 2019. This program aims to attract highly talented individuals, with cutting edge skills in target industry sectors. The Global Business and Talent Attraction Taskforce has identified a number of future-focused industries and technologies where Australian capabilities would be strengthened by the entry of both international enterprises and individual experts. India's particular strengths are assessed as: agribusiness; critical minerals and resources; culture, tourism and leisure;

data sciences and digital technologies; energy, renewables and resources; education and research; film; financial services and fintech; and infrastructure. The IES also highlights opportunities in many of these sectors. Recognising the importance of India as a source of global talent and business, the Department of Home Affairs has established a Global Talent Officer for South Asia, tasked with identifying exceptional talent in the region interested in relocating to Australia, and expediting their move.

REGIONAL DISTRIBUTION

Reflecting the spread of the broader population, the majority of Australia’s Indian diaspora lives on the east coast. Figure 4 shows the areas of Australia with the highest concentrations of Indian diaspora communities.

Australian residents with Indian ancestry reside in the highest concentrations in areas around Western Sydney, such as Parramatta, as well as in outer-suburban Melbourne, including south western

suburbs around Tarneit, south eastern areas around Dandenong and northern suburbs around Glenroy.

In terms of the split between capital cities and regions, the last two published Censuses show greater growth of the Indian diaspora in regional New South Wales, Victoria and Queensland. But in other states, the diaspora has grown at similar or higher rates in the capital cities than in the regions, as shown in Table 2.

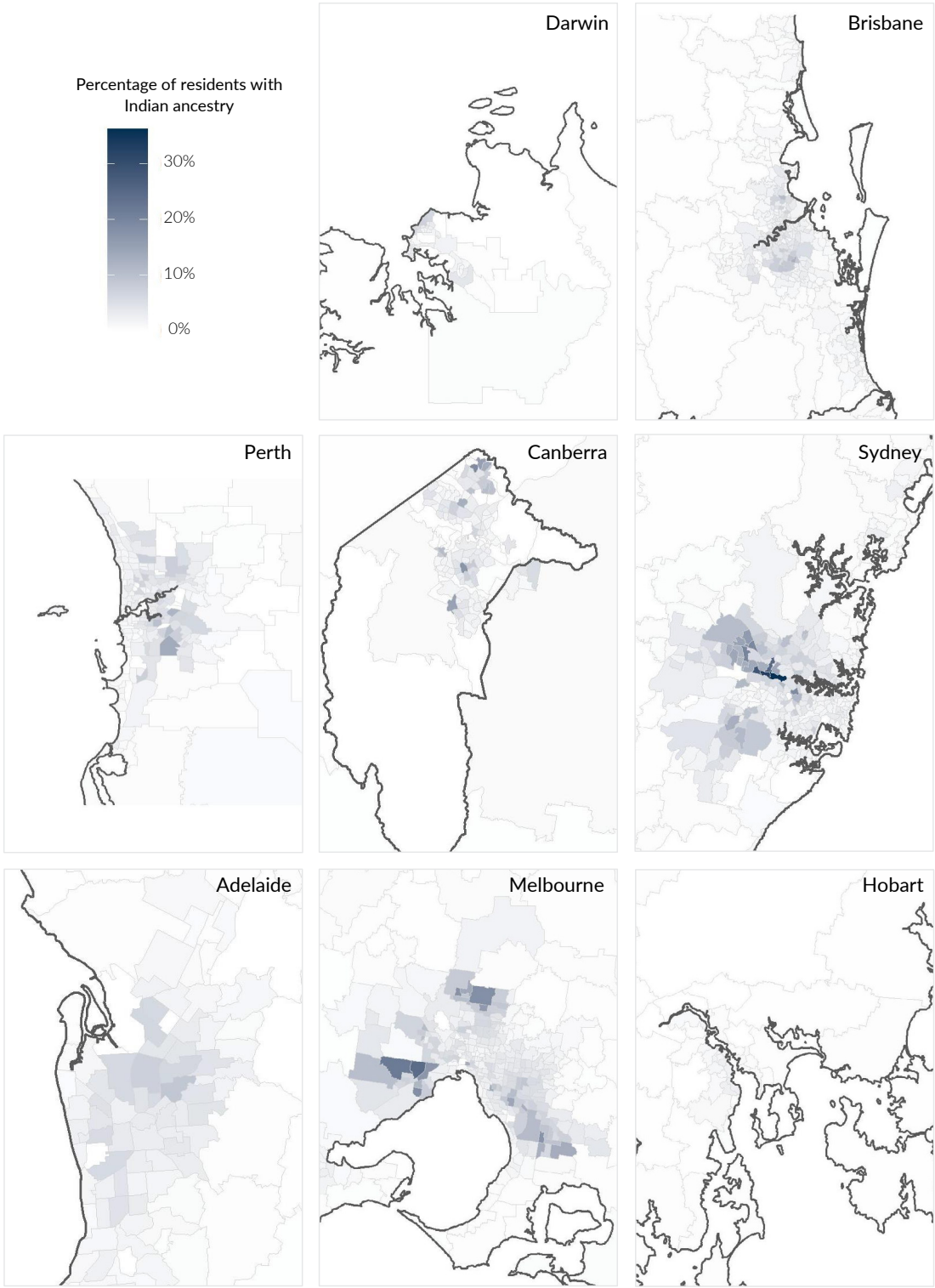
Table 2 : The Indian diaspora population across greater capital cities and regions of Australia

Region	2011	2016	Percentage Growth from 2011 to 2016
Greater Sydney	128,449	194,017	51%
Rest of NSW	10,120	17,769	76%
Greater Melbourne	126,075	198,450	57%
Rest of Vic	6,166	10,662	73%
Greater Brisbane	34,159	54,227	59%
Rest of Qld	11,910	19,781	66%
Greater Adelaide	19,610	31,444	60%
Rest of SA	1,192	1,590	33%
Greater Perth	37,867	64,934	71%
Rest of WA	2,378	3,816	60%
Greater Hobart	1,185	1,789	51%
Rest of Tas	865	1,118	29%
Greater Darwin	1,686	3,364	100%
Rest of NT	718	1,160	62%
Australian Capital Territory	8,054	14,544	81%

Source: ABS Census (2011, 2016). Green shading denotes locations with highest growth rate in each state or territory.



Figure 4: People with Indian ancestry in Australian states and territories, 2016



Source: ABS Census (2016).

AGE-SEX DISTRIBUTION

The age-sex distribution of the Indian-born population is shown in Figure 5.

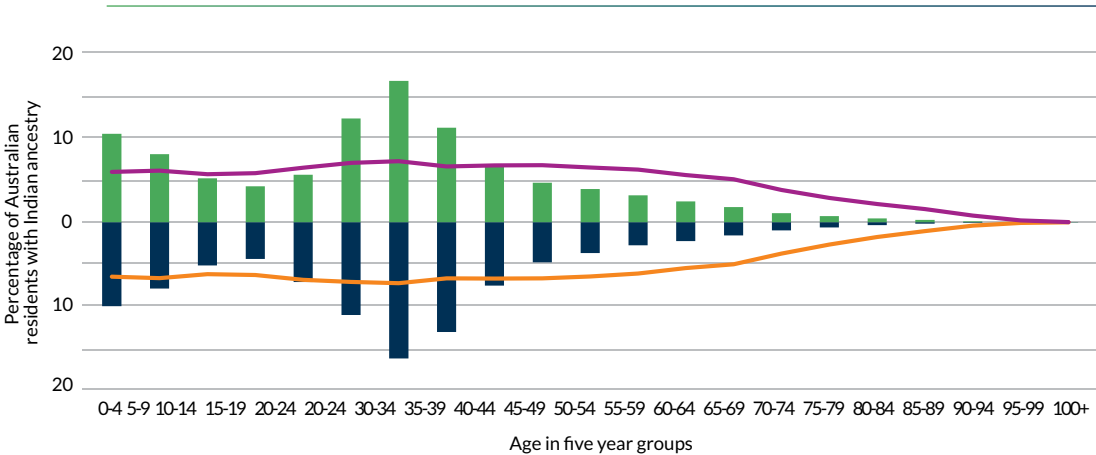
Indian-born residents represent a comparatively young population cohort. The median age of Indian-born residents in Australia in 2016 was just 33 years, compared to 44 years for overseas-born migrants generally, with 87 per cent under the age of 50. Compared to the general population, there is a larger share among Indian-born people aged 25 to 39 as well as a larger percentage of children under the age of nine. This age profile, combined with other demographics highlighted

in this report, illustrates clearly the potential economic contributions of the Indian diaspora community. Being relatively young, many members of the diaspora retain the potential to build their skills into the future and deliver on Indian trade and investment during their careers.

In 2016 there were 109 males for every 100 females in the Indian-born population in Australia, a shift from 2011 when there were 125 men to 100 women. There are slightly more men than women in the 35 to 39 year old group.



Figure 5: Demographic characteristics of Indian-born residents in Australia



Source: ABS Census (2016) Indian Diaspora Males Indian Diaspora Females Australian Males Australian Females

LINGUISTIC DIVERSITY

Australia's Indian diaspora community reflects the complexity and diversity of Indian society with many sub-groups and community associations. Figure 6 captures a measure of its linguistic diversity, showing the number of speakers of the top six Indian languages. It is important to note that several of the languages in Figure 6 are spoken across a number of South Asian and other countries. For these purposes, the data presented in Figure 6 focus on languages spoken by respondents claiming Indian ancestry. It is also worth noting that there are many dialects spoken by Indian diaspora communities not captured in these data.

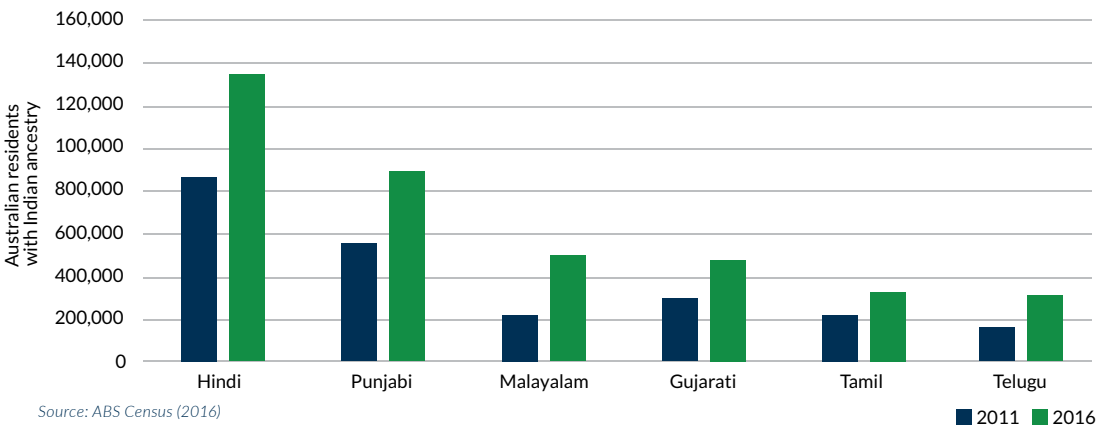
The rapid growth of Australia's Indian-born population has been accompanied by corresponding growth in the number of Indian languages spoken at home. The 2016 Census revealed that Hindi was spoken at home in Australia by 159,653 speakers. 135,443 of these indicated Indian ancestry with Fijian-Indian being the next most common ancestry reported among this

group. Punjabi came a close second at 92,591, followed by Malayalam, Gujarati, Tamil and Telugu speakers. This suggests ongoing strength in immigration from northern India, with Punjabi and Gujarati speakers represented disproportionately compared to their population share in India.

This also suggests there has been strong growth in immigration flows from southern India, a region that continues to perform well on human development indices. Malayalam displaced Gujarati as the third most spoken Indian language in Australia in 2016 among those claiming Indian ancestry. Malayalam and Telugu speakers are also represented disproportionately among Australia's Indian diaspora compared to their population share in India.

This data is reflective of the numbers of Indian diaspora members with the ability to contribute their language skills to Australian engagement with India. There is strong overlap between the language skills represented and the priority states for engagement identified in the IES.

Figure 6: Top six Indian languages spoken at home by people who indicated Indian ancestry



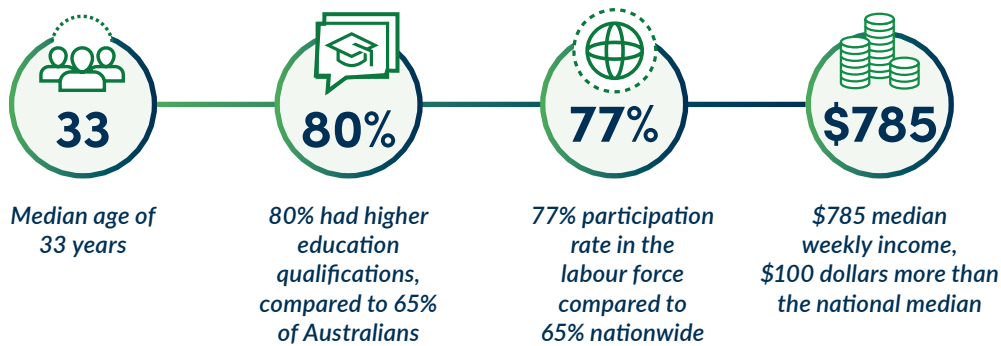
EDUCATION AND EARNINGS

As in comparable countries with successful Indian diaspora communities, Australia’s Indian diaspora community is a strong source of education and enterprise.

Figure 7 shows a number of socio-economic characteristics of Indian-born residents in 2016. Besides being younger, the Indian-born population in 2016 was on average more likely to hold an undergraduate or higher degree and

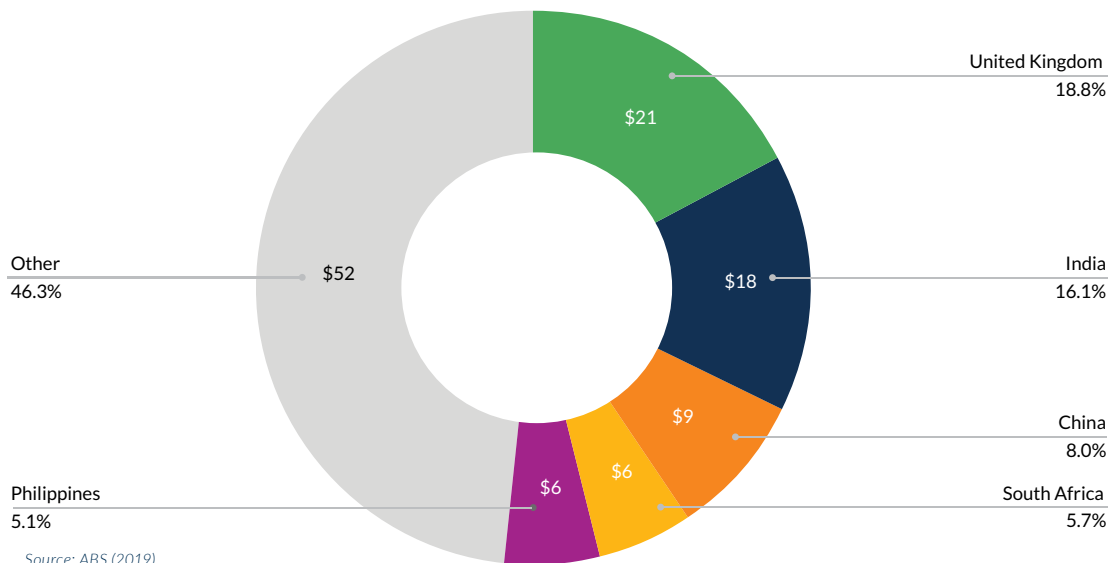
earn household incomes greater than both the general population and overseas-born migrants. Accordingly, the Indian diaspora is a community with strong professional qualifications, which potentially can be brought to bear on the trade and investment relationship with India. Reflecting strong earnings, Indian-born residents are Australia’s second largest tax-paying migrant group contributing 16 per cent of migrant tax revenue in 2016-17 (see Figure 8).

Figure 7: Select socio-economic characteristics of Indian-born residents in 2016



Source: ABS Census (2016)

Figure 8: The largest tax-paying migrant groups in Australia in 2016 (billion)



Source: ABS (2019)

EMPLOYMENT

In 2016, there were 277,000 Indian nationals working in Australia and a further 33,000 workers claimed Indian ancestry but were neither born in India nor Australia. Australian-born workers of Indian ancestry numbered 26,000, suggesting that first-generation immigrants are the largest group of workers of Indian ancestry in Australia.

Indian-born residents are represented disproportionately in high-skill occupations, including ICT, health, human resources, marketing and as engineering and science technicians. Figure 9 shows the occupations in which Indian-born residents make up the largest shares compared to the general Australian population.

These occupations represent areas of skills shortage, likely strong future demand in Australia and export potential. They also mirror the top occupations through which Indian immigrants entered Australia as temporary workers and skilled migrants in 2019-20; as software and applications programmers, ICT analysts and registered nurses. Many of these occupations are linked to export directly or indirectly and build Australia's services capability.

It is important to note that Indian-born workers are also represented at substantially higher rates than the general population as carers and aides, road and rail divers and food trades workers.

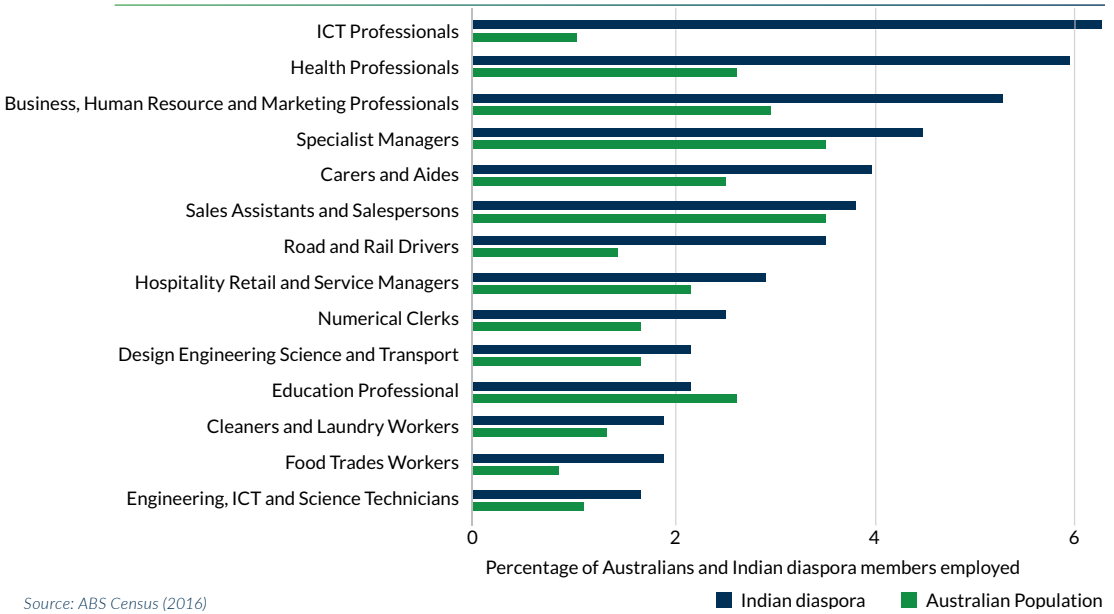


CASE STUDY: DIASPORA TALENT EMPLOYED BY INDIAN IT PROVIDERS IN AUSTRALIA

Indian technology giants such as TCS, Infosys, HCL, Wipro and Tech Mahindra have large operations in Australia employing Indian diaspora members. They support the IT infrastructure and digital transformation of major Australian organisations and are tech thought leaders, leveraging their global

expertise to drive productivity. As the demand for local tech talent continues to grow, there is increasing recognition of the Indian diaspora's value to the Australian economy and future competitiveness, besides the talent pools of Indian tech companies more generally.



Figure 9: The top occupations in 2016 by percentage for Indian-born residents

Source: ABS Census (2016)

Table 3: Growth in the top 20 and select additional occupations for the Indian-born in Australia

Occupation	2011	2016	Change in percentage	Occupation growth
1 Carers and Aides	2.6%	4.0%	1.4%	23.0%
2 Food Preparation Assistants	3.1%	3.8%	0.7%	15.8%
3 Health Professionals	3.9%	5.7%	1.7%	14.5%
4 Specialist Managers	2.0%	3.1%	1.1%	13.8%
5 ICT Professionals	9.4%	15.1%	5.7%	13.5%
6 Cleaners and Laundry Workers	2.6%	3.6%	0.9%	13.5%
7 Food Trades Workers	4.4%	5.4%	1.0%	10.7%
8 Business, Human Resource and Marketing Professionals	3.2%	4.4%	1.1%	10.7%
9 Sales Assistants and Salespersons	1.9%	2.7%	0.8%	10.5%
10 Education Professionals	1.6%	2.1%	0.5%	9.9%
11 Inquiry Clerks and Receptionists	2.2%	2.7%	0.5%	9.5%
12 Road and Rail Drivers	3.5%	5.8%	2.3%	8.3%
13 Office Managers and Program Administrators	1.7%	2.4%	0.7%	8.0%
14 Engineering, ICT and Science Technicians	2.7%	3.8%	1.1%	3.4%
15 Hospitality, Retail and Service Managers	1.9%	3.3%	1.4%	2.4%
16 Design, Engineering, Science and Transport Professionals	2.8%	3.4%	0.6%	2.0%
17 Other Clerical and Administrative Workers	2.2%	3.1%	0.8%	1.3%
18 Factory Process Workers	3.4%	4.0%	0.6%	-1.0%
19 Sales Support Workers	2.9%	3.8%	0.9%	-4.2%
20 Numerical Clerks	2.9%	3.9%	1.0%	-5.5%

Source: ABS Census (2011, 2016)

Analysis of 2011 and 2016 Census data indicates that across all occupations experiencing growth in Australia, the proportion of Indian-born workers has increased. In addition, the areas highlighted in Table 3 illustrate the areas in which Indian-born representation exceeds its share of the Australian population: STEM, health and management feature among these. ICT has a very significant Indian-born representation, comprising over 15 per cent of the occupation share as at 2016. Overall, the Indian-born population is represented beyond its population share across the top five occupations for growth in Australia.

It is reasonable to assume a lag between employees with Indian ancestry entering occupations and any impacts on their businesses and industries in the form of increased trade and investment with India. Table 4 below illustrates the growth in the top four services exports from Australia to India between 2015 and 2019. ICT services saw the greatest services export growth of 163.2 per cent from 2015 to 2019. This coincided with the employment of Indian diaspora professionals in ICT services also growing strongly between 2011 and 2016.

Table 4 : Growth in services exports from Australia to India, 2015 to 2019

Export sector	Services export growth 2015-2019
Telecom. computer & information services	163%
Travel services (Personal)	124%
Travel services (Business)	64%
Financial services	59%

Source: ABS (2020)

In terms of the geographical spread of Indian diaspora workers across Australia, there are disparate regional distributions across occupations. New South Wales has the largest proportion of ICT professionals from the Indian diaspora community. In South Australia and Queensland,

health workers from the diaspora are more common. South Australia has a larger percentage of both carers and aides and road and rail drivers from the Indian diaspora community than New South Wales and Queensland.

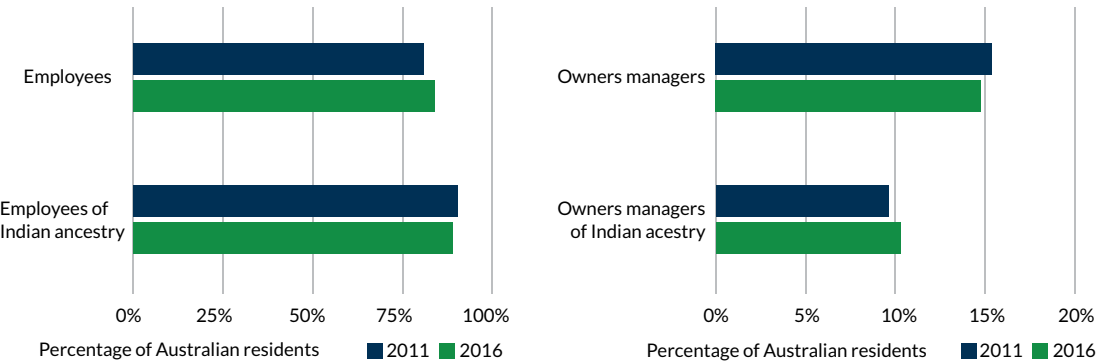


ENTREPRENEURSHIP

Entrepreneurship is an area of continued expansion for the Indian diaspora with ABS data showing that despite an overall decrease in the percentage of Australian residents who own

and manage a business over the last two census collections, the proportion of those with Indian ancestry has increased (see Figure 10).

Figure 10: Employment and business ownership percentage who declared Indian ancestry and source in 2011 and 2016



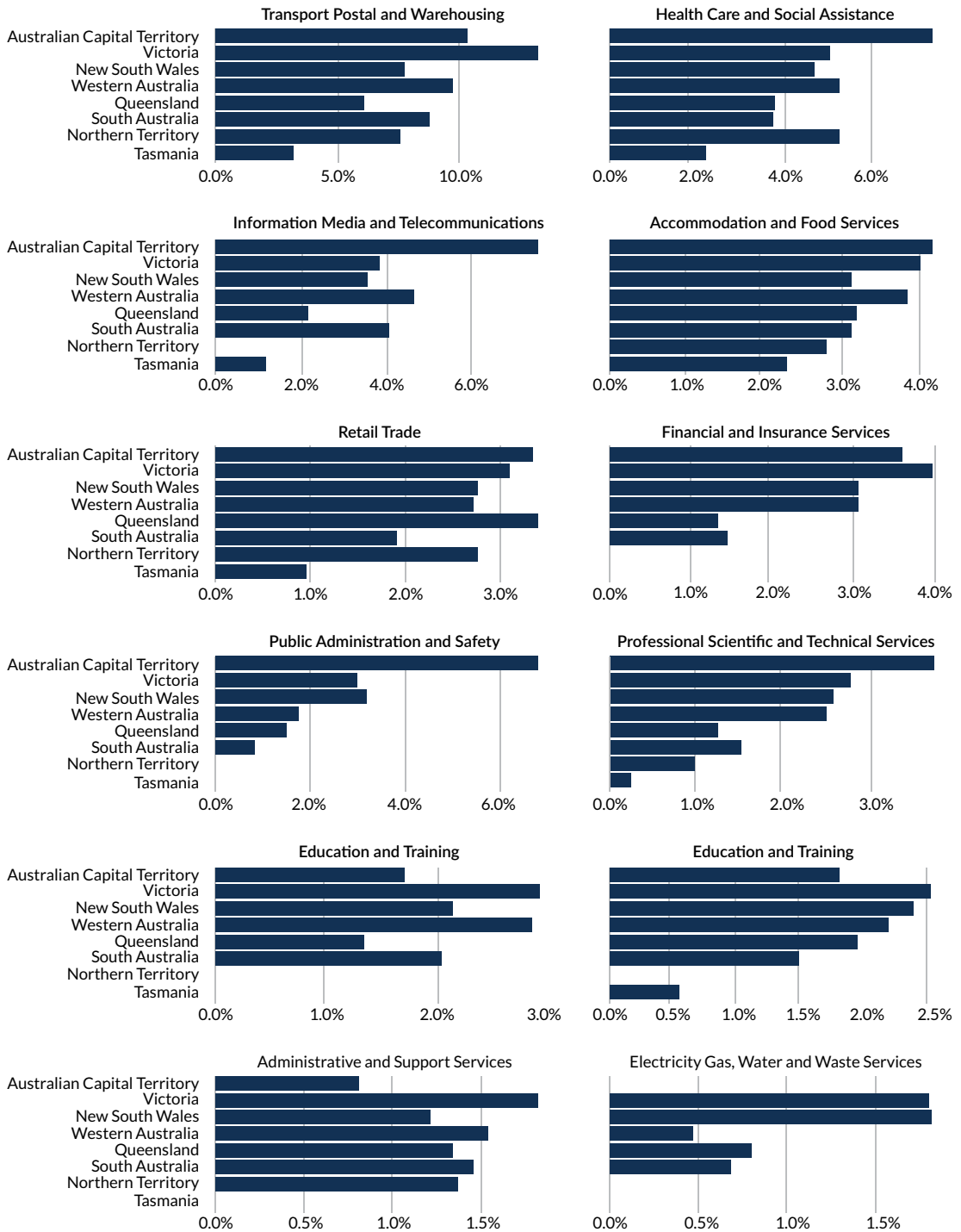
Source: ABS Census (2011, 2016). Note: not stated and not applicable were removed from the data

Figure 11 shows the breakdown of business ownership by people with Indian ancestry across sectors and by state and territory. The bars illustrate the proportion of businesses owned by people with Indian ancestry. This analysis indicates that the ACT,

Victoria, NSW and WA are home to the highest proportions of Indian diaspora-owned businesses in sectors that align to priority sectors of the IES, such as health, financial services, education and other professional services.



Figure 11: Indian entrepreneurship in sectors across the states and territories of Australia



Source: PwC Analysis of the ABS Census (2016)

INTERNATIONAL STUDENTS

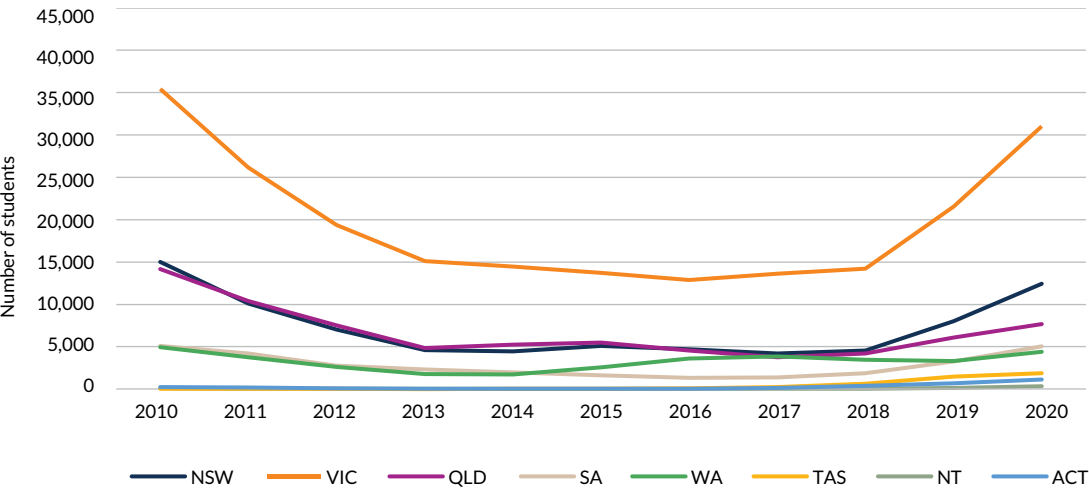
Indian international students are a deeply valued component of people-to-people links between Australia and India. India is Australia's second largest source of international students and prior to the onset of the COVID-19 pandemic numbers were growing rapidly.

The fields of study that attract Indian international students to study in Australia are shown in Figure 13. Management and Commerce,

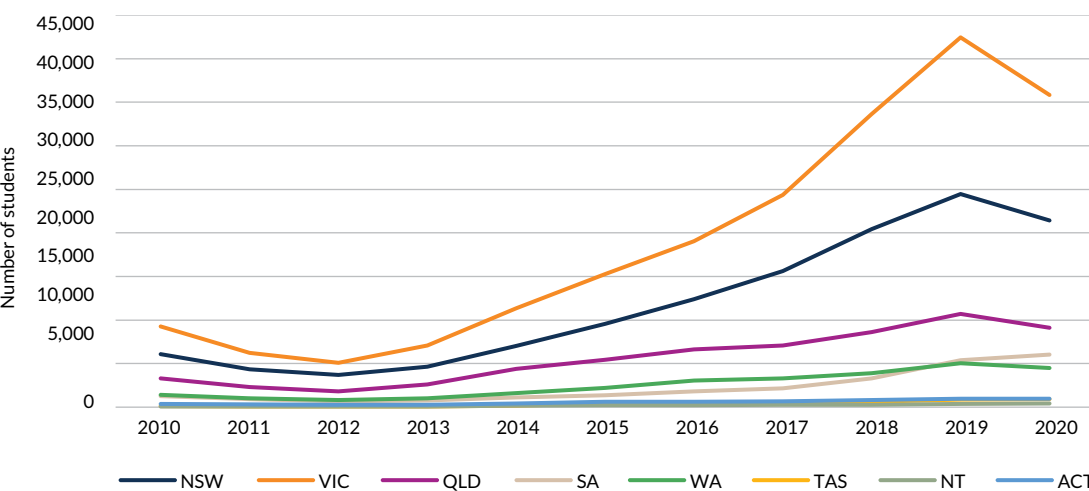
Information Technology, Engineering and Related Technologies and Health led in the enrolment numbers for 2020, indicating Indian international students favour occupations in which the broader diaspora community is concentrated, including STEM, health and management. These are priority sectors of the IES. Opportunities exist to build Indian international student numbers in agribusiness and energy.

Figure 12: International students from India enrolling on a student visa to study in each Australian jurisdiction in (a) Higher Education courses and (b) VET courses, 2010 to 2020

(a) Higher Education courses

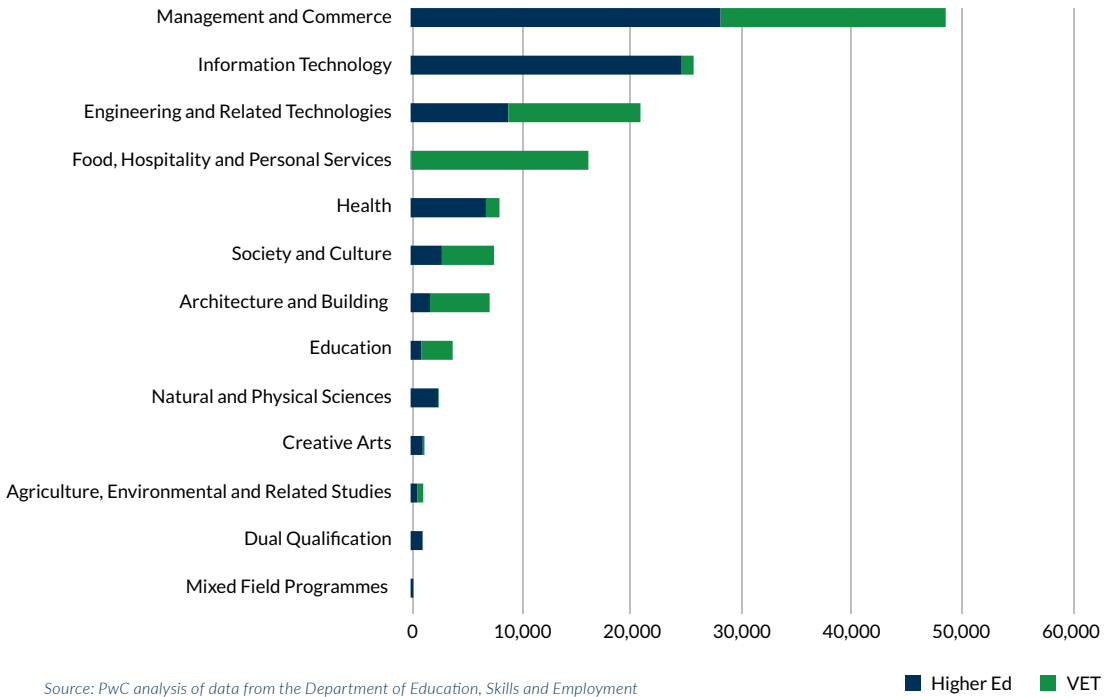


(b) VET courses



Source: PwC analysis of data from the Department of Education, Skills and Employment

Figure 13: The top fields of study for international students from India in Higher Education and VET courses in 2020



ACADEMICS AND RESEARCHERS

The 2011 and 2016 ABS census data showed a rise in the percentage of university lecturers and tutors with Indian ancestry across all states and territories of Australia, indicating growth in a talent pool potentially supporting reputation-building efforts in India. Most Indian diaspora academics

and researchers are concentrated in Victoria and New South Wales (Figure 15), largely mirroring the locations of Australian universities. There is disproportionate representation in Victoria and the Northern Territory.

Figure 14: The number of university lecturers and tutors in the Indian diaspora employed across Australia

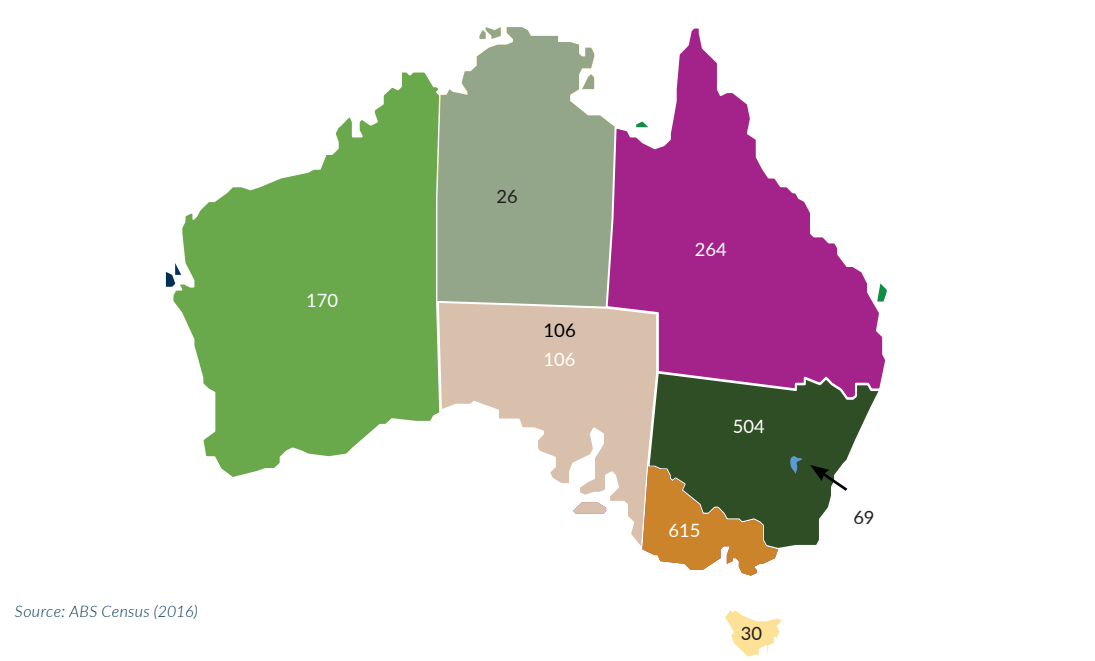
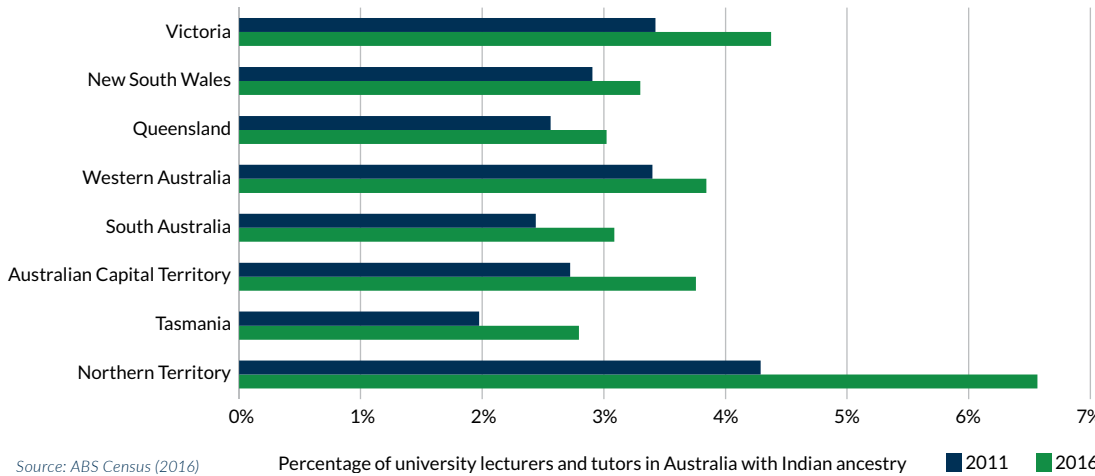


Figure 15: Percentage of university lecturers and tutors with Indian ancestry employed in each Australian state and territory





CASE STUDY: ARCH-INDIA - STRENGTHENING AUSTRALIA-INDIA RESEARCH COLLABORATION AND ENGAGEMENT: CASE STUDIES AND GOOD PRACTICES

Navigating the research ecosystem in India is complex and collaboration with Indian researchers has relied heavily on either the Indian diaspora or individuals with a connection to India. The Australian Researcher Cooperation Hub - India (ARCH-India), established in 2021, aims to support researcher engagement between India and Australia by breaking down barriers to bilateral research collaboration. The virtual Hub offers information and resources to support connection and increase mobility; identifies major funding sources; and showcases research excellence in both countries. An integral part of the Hub is its Mentorship Program, to assist early career researchers and scholars to connect with more experienced researchers for guidance on establishing relationships and initiating collaboration. The Hub will be officially launched at the 6th Australia India Education Council meeting in 2022.

Indian diaspora researchers will continue to form an integral part of the research networks between Australia and India. Senior Indian diaspora researchers with connections in both India and Australia would offer valuable mentoring opportunities (and are welcome to apply to participate in the Mentorship program). A 2021 report of the Australia India Institute, Strengthening Australia-India Research Collaboration and Engagement: Case Studies and Good Practices compiled by the Department of Education, Skills and Employment demonstrates the leading role Indian diaspora researchers and academics have played in fostering joint research between Australian and Indian educational institutions, including the way they use their networks to advance research collaboration.



A SNAPSHOT OF DIASPORA GROUPS' POTENTIAL ECONOMIC CONTRIBUTIONS

KEY POINTS

- The Indian diaspora is well represented in the Australian business community and as senior academics across Australian universities.
- There are an estimated 2,840 directors and managers of Indian heritage out of a total of over 20,730 working in Australia. This corresponds to over 10 per cent of the total, while the diaspora represents approximately 3 per cent of the Australian population overall.
- A subset of 964 directors and managers of Indian heritage have strong potential to influence trade and investment with India. This subset is well represented in health, tourism, ICT and resources, across companies representing over \$250 billion in annual turnover.

To develop a better understanding of the Indian diaspora networks with the greatest capacity to contribute to bilateral trade and investment, this report presents a snapshot of three specific sub-groups:

- company directors and managers in large enterprises and corporations;
- entrepreneurs, directors and managers in small to medium enterprises (SMEs); and
- senior academics employed at Australian universities.

This is not to discount the contributions of other individuals and groups. For example, politicians, professional athletes, international student alumni, civil society actors, artists and creative practitioners among others play a powerful role in influencing perceptions of Australia in India. The selection of the three sub-groups above is driven by the datasets utilised for this research and recognises that directors and

managers in the business community are well positioned to create and implement strategies to facilitate trade and investment with India, while senior academics have access to Australia's innovation and commercialisation systems.

To identify entities within each sub-group, an Orbis search was conducted for companies in Australia with directors and managers listing Indian ancestry. 2,840 directors and managers of Indian heritage were identified out of a total cohort of over 20,730. This corresponds to over 10 per cent of the total, while the diaspora represents approximately 3 per cent of the Australian population overall.

Orbis uses the operating revenue, value of assets and number of employees to define the size of companies. This research adopts the Orbis definitions, including classifying 'large enterprises and corporations' as having 150 or more employees, and 'entrepreneurs and SMEs' as having fewer than 150 employees.

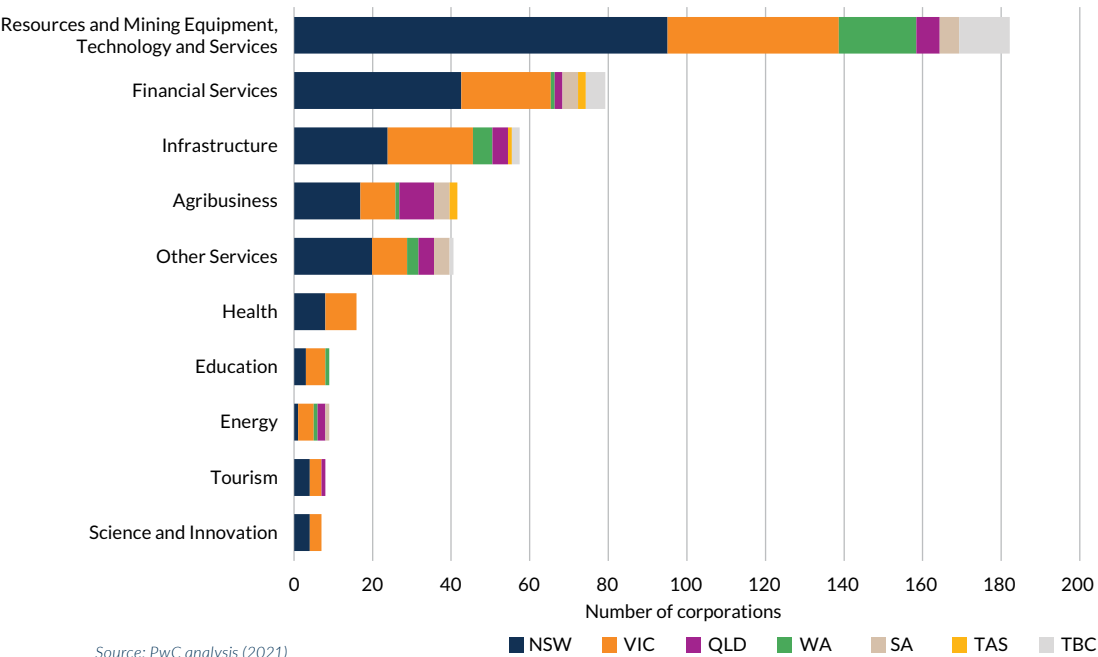


LARGE ENTERPRISES AND CORPORATIONS

Using publicly available information on all Australian registered companies, 456 large enterprises and corporations were identified as operating in Australia with one or more directors or managers of Indian ancestry, representing 1.4 per cent of all Australian corporations. A breakdown of the industries in which these

companies operate and the states and territories in which they are headquartered is detailed in Figure 16. Many of these organisations operate in the Resources and Mining Equipment, Technology and Services (METS) sector, indicating the concentration of directors and managers of Indian heritage within that sector.

Figure 16: The number of large enterprises and corporations with a manager or director of Indian ancestry in various sectors and states



ENTREPRENEURS AND SMES

This research identified 1,858 entrepreneurs of Indian ancestry or SMEs employing directors or managers of Indian ancestry¹. The industries in which these companies operate is detailed in Figure 14.

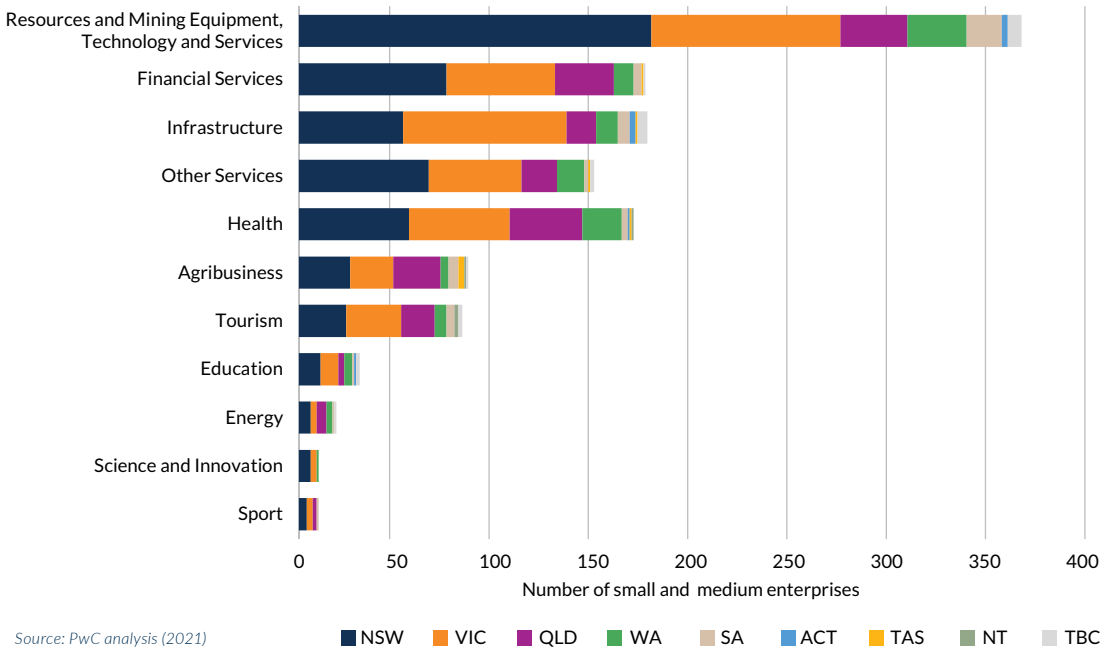
The most common sectors for directors and managers in SMEs and entrepreneurs of Indian ancestry are similar to those for large corporations and are located predominantly in New South Wales and Victoria. Proportionally a greater number of SMEs operate in the health sector

than corporations. This may be due to doctors of Indian ancestry setting up practices and operating as small business owners or operating other small businesses in the healthcare sector.

New South Wales and Victoria host the largest share of large corporations and SMEs with a director or manager of Indian heritage. There were no large corporations and very few SMEs identified in the Australian Capital Territory and Northern Territory.

¹ Some SME data are not available to confirm the sector and jurisdiction of operation.

Figure 17: The number of SMEs with a manager or director of Indian ancestry in various sectors and states



SENIOR ACADEMICS

Table 5 outlines the representation of academics of Indian heritage at lecturer level and above employed at Australian universities. The proportion of people of Indian heritage in universities in both academic and non-academic positions has remained relatively stable over the period of 2016 to 2020, with approximately 1.7 per cent (up from

1.4 per cent in 2016) of all university staff. The share of academics at lecturer level and above increased from 1.8 to 1.9 per cent from 2016 to 2020. This is positive movement, although the Indian diaspora in Australia is estimated to represent almost 3 per cent of the total population.

Table 5: The Full Time Equivalent workload of academics of Indian heritage at lecturer level and above employed in Australian universities, by state

State	Number of staff with Indian ancestry		Percentage of staff with Indian ancestry	
	2016	2020	2016	2020
Victoria	186	230	2.0%	2.2%
New South Wales	160.4	212.9	1.6%	1.9%
Queensland	82	104.8	1.7%	1.6%
Western Australia	62.5	73.4	1.8%	1.9%
South Australia	39.8	52.7	1.6%	2.0%
Australian Capital Territory	32.2	37.2	2.1%	2.3%
Northern Territory	17.8	10.5	7.0%	4.3%
Tasmania	4.4	7.3	0.5%	0.9%
Total	585.1	728.7	1.8%	1.9%

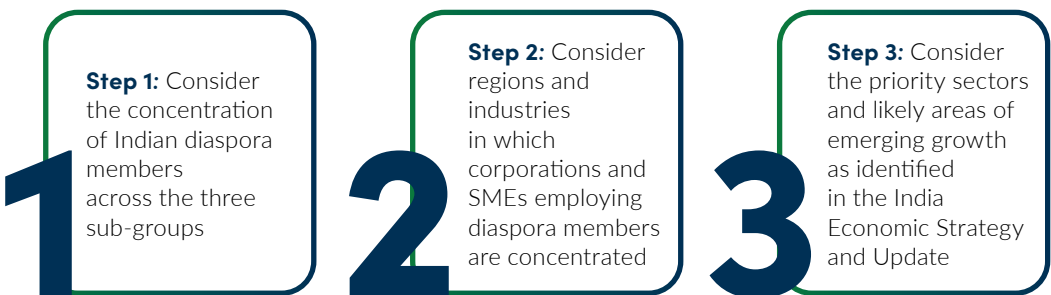
Source: PwC analysis of data from the Department of Education, Skills and Employment, 2021

A SUBSET OF ECONOMICALLY INFLUENTIAL DIASPORA MEMBERS

Having identified company directors, managers and researchers of Indian ancestry, this section analyses a subset of 964 diaspora members that may be most able to contribute to increased trade and investment between Australia and India. The approach taken to develop this subset is shown

in Figure 18. The framework applied a set of criteria to prioritise between and within the three sub-groups, identifying individuals by reference to bilateral trade and investment trends and the emerging sectors of significance to the relationship. The term 'influential' is used in this specific sense.

Figure 18: Prioritisation framework to identify diaspora members most able to contribute to the economic relationship



Source: PwC analysis

Large enterprises and corporations

As shown in Table 6, the prioritisation framework identified:

- 429 large enterprises and corporations with directors and managers of Indian ancestry
- \$810 billion in total revenue from these organisations, including \$250 billion in the health, tourism and resources sectors.

The sectoral breakdown of these large enterprises and corporations shown in Table 6 corroborates the findings that the penetration of Indian diaspora members in director and manager positions in the education and agribusiness sectors is not as

strong as other sectors. In contrast, there is high representation in the health, tourism and resources sectors, particularly in terms of their share of the total number of directors and managers.

In terms of regional breakdown, the majority of these large enterprises are located within major capital cities and immediate surroundings.

Entrepreneurs and SMEs

Among entrepreneurs of Indian ancestry and SMEs employing directors and managers of Indian ancestry, this research identified 2,414 influential entities generating \$1.1b in total revenue, shown in Table 7.

Table 6: The sectoral distribution of large enterprises and corporates employing influential Indian diaspora members

Sector	Revenue (\$b)	Number of diaspora members	Percentage of diaspora members
Financial Services	\$379.5	79	0.8%
Resources and Mining Equipment, Technology and Services	\$246.0	278	7.3%
Agribusiness	\$94.4	31	1.3%
Infrastructure	\$37.6	38	2.2%
Energy	\$27.9	5	2.8%
Science and Innovation	\$19.3	3	1.7%
Tourism	\$2.8	4	7.3%
Health	\$2.7	13	8.4%
Education	\$0.6	6	3.6%
Sport	\$0.3	2	2.8%

Source: PwC analysis



Table 7: The sectoral distribution of influential Indian diaspora entrepreneurs and SMEs employing influential Indian diaspora directors and managers

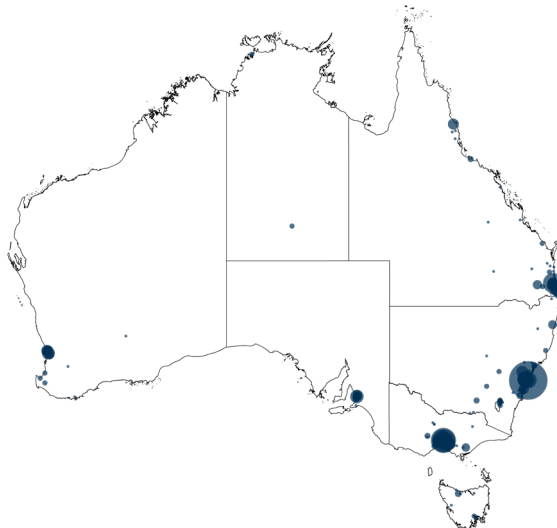
Sector	Revenue (\$b)	Number of diaspora members	Percentage of diaspora members
Resources and Mining Equipment, Technology and Services	\$418.6	443	16%
Infrastructure	\$110.6	185	20%
Health	\$104.3	185	30%
Agribusiness	\$91.3	79	16%
Tourism	\$76.2	103	23%
Financial Services	\$75.1	201	25%
Science and Innovation	\$41.3	6	13%
Education	\$24.1	30	10%
Energy	\$13	10	7%
Sport	-	12	23%
Total	\$954.5	1254	

Source: PwC analysis (2021)

The resources and METS, infrastructure and health sectors all have revenues in excess of \$100m for the SMEs in which influential members of the Indian diaspora are represented. They account for between 15 to 30 per cent of the total directors and managers. There is strong annual revenue in both tourism and agribusiness totalling over \$150m. The majority of the SMEs are located

within major capital cities and immediate surroundings, with some in regional areas. Figure 19 illustrates where these entrepreneurs and SMEs are located. The areas shaded blue indicate those postcodes home to SMEs employing Indian diaspora directors and managers and the size of the shaded circles correspond to the number of such SMEs.

Figure 19: Distribution of influential diaspora entrepreneurs and SMEs employing Indian diaspora members



Source: PwC analysis (2021). The blue areas indicate postcodes home to SMEs. Larger blue circles on the map represent those postcodes with larger numbers of SMEs.

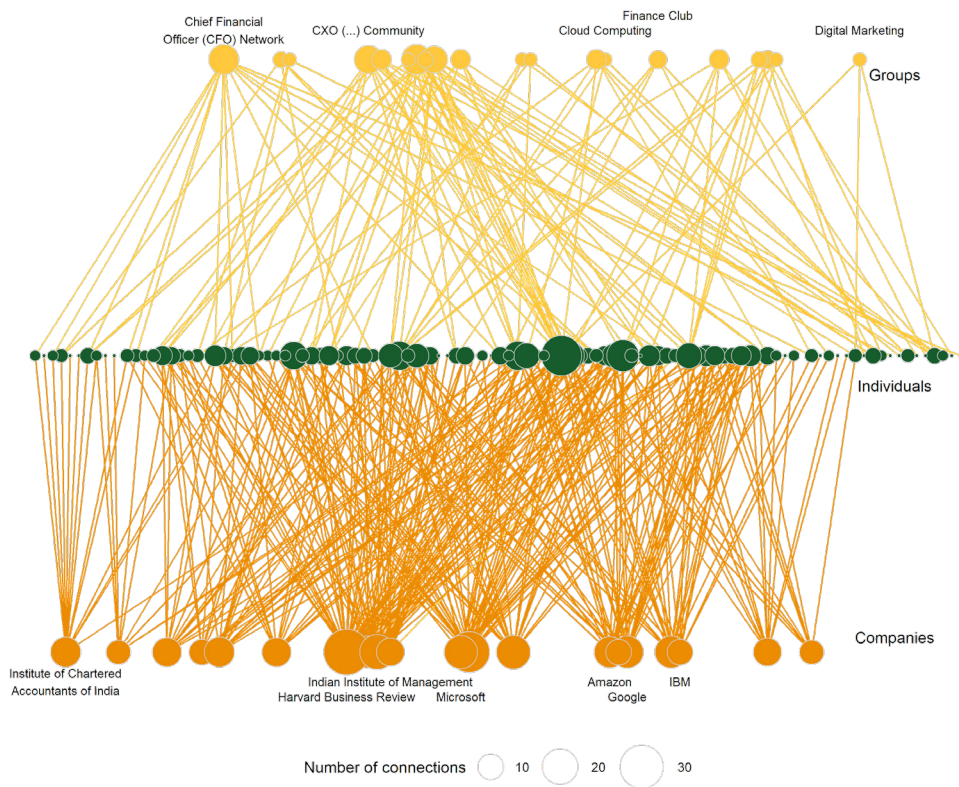
DIGITAL NETWORK ANALYSIS

The preceding analysis provided a top-down view of a subset of company directors and managers of Indian ancestry across specific sectors of relevance to the Australia-India economic relationship.

As trade and investment links are built not only through direct working relationships, but increasingly powered by group memberships online, social media data were analysed for the subset of influential 964 diaspora members to understand what types of latent professional networks and interests are common across these Indian diaspora members.

The LinkedIn Interests of 190 of the 964 influential diaspora individuals who maintain a LinkedIn profile are illustrated in the network display in Figure 20. The degree of alignment is shown by proximity in the display, whereby groups and companies that appear closer to each other horizontally tend to attract individuals with similar interests. As per Figure 20, the key companies of interest among this subset were news and technology companies, besides educational institutions.

Figure 20: A network display of the top 20 groups and companies that are LinkedIn Interests of a sample of influential diaspora members



Source: PwC analysis of LinkedIn data (2021)

OVERVIEW OF INDIAN DIASPORA BUSINESS NETWORKS

Beyond the latent digital networks among the directors and managers visualised in Figure 20, there are many established professional networks operating across the Indian diaspora business community in Australia more generally. These networks widely vary in terms of the strength of their online membership and their digital activity, including across social networking platforms.

Table 8 lists some of the groups identified during the development of this report. These groups not only facilitate professional networking among the diaspora business community but also complement the work of Australian industry and governments in supporting businesses seeking to engage the Indian market.

This list demonstrates a measure of the interconnectedness of the Indian diaspora community focused on the bilateral economic relationship, but it is not exhaustive. It does not capture all business-focused or professional networks among the Indian diaspora community. There is an extensive array of networks organised along cultural, linguistic, sub-regional and community lines. Many offer less formal community-based networks that spill over into business connections. These networks widely vary in terms of the strength of their online membership, their digital activity, including across social networking platforms, and the extent to which they focus on the diaspora community.

Table 8 : Identified networks across the Indian diaspora with a focus on business

Name of Network/Association
ANZ India Business Chamber
Australia India Business & Trade Foundation
Australia India Business Council
Australia India Chamber of Commerce
Australia India Youth Dialogue
Australian Indian Medical Graduates Association
ITians Association of Australia
India Australia Business and Community Alliance
Indian Medical Association – Australian Chapter
Indo-Australian Chamber of Commerce
Institute for Australia-India Engagement
International Business Council of Australia
The Institute of Chartered Accountants of India - Australian Chapter

Source: PwC analysis (2021)

FOCUS AREAS FOR DISCUSSION

KEY POINTS

- This research will inform and influence diaspora engagement strategies to better target Australia's engagement and grow ties between Australia and India.
- The report's findings suggest a range of focus areas for discussion with the Indian diaspora community to better enable its contributions, including how new business opportunities can be unlocked and how emerging diaspora talent can be showcased across the business community.

The preceding analysis outlined that, based on desktop research methods, the Indian diaspora community is on average a youthful community, represented disproportionately as educated professionals working in STEM, health and business management, as well as increasingly represented in senior academic positions. It illustrated the linguistic diversity of the diaspora community, including language skills relevant to priority Indian states for Australian engagement. The analysis highlighted the community's increasing entrepreneurialism and its strong representation in several services sectors with export potential in the context of evolving services trade between Australia and India. It also indicated the latent and established business-focused networks among the Indian diaspora community.

This report's findings suggest three focus areas to better enable diaspora-focused linkages in the bilateral economic relationship. It is expected the evidence base presented in this report could provide the foundation for broad collaboration and for continued engagement with the Indian diaspora community, including to discuss what motivates Indian diaspora groups in their economic contributions to the relationship, what the major obstacles are, what the most effective contact points might be and how cooperation with other stakeholders can be improved.

• HOW CAN BUSINESS-FOCUSED DIASPORA GROUPS BE SUPPORTED STRATEGICALLY TO:

- explore new business opportunities and business matching exercises, drawing on Australian sectors of strength with strong diaspora concentration, such as health, tourism and ICT, as well as sector- and region-specific networks of diaspora talent;
- focus relationships on high-growth sectors where India has an advantage;
- link research organisations with diaspora business networks to support promotion and commercialisation of research; and
- explore opportunities in sectors that traditionally have had low diaspora penetration, such as agribusiness, but could benefit from the skills and expertise of the Indian diaspora to drive innovation and new markets?

HOW CAN DIASPORA 'BUSINESS CHAMPIONS':

- promote government-led bilateral trade and investment initiatives across diaspora business networks;
- support senior Australian business leaders to understand better the diaspora business networks that can provide insight into the market; and
- support members of the diaspora to provide advice on successful models of entering and operating in the Indian market, navigating risks, interpreting business culture, leveraging language skills and region-specific expertise, recognising India's diverse state economies?

HOW CAN DIASPORA-FOCUSED MENTORING AND OUTREACH PROGRAMS:

- help showcase emerging talent in the Indian diaspora across the business community;
- promote Indian diaspora members achieve key roles in Australian businesses, enabling increased trade potential with India; and
- highlight success stories of diaspora-owned and managed businesses that are driving bilateral trade and investment flows?



CASE STUDY: EXISTING DIASPORA ENGAGEMENT BY THE COMMONWEALTH GOVERNMENT

Besides efforts at the state government level, various agencies across the Commonwealth Government maintain regular engagement with the Indian diaspora on trade and economic issues.

The Department of Home Affairs' network of Business, Industry and Regional Outreach officers, located across Australia, engage with members of the Indian diaspora through professional and industry networks to promote Australia's Skilled Visa Program options. They also provide a mechanism for community members to share information about their priorities, concerns and the impact of government policies and programs on their communities.

Representatives from the Departments of Foreign Affairs and Trade and Austrade – in Canberra and across Australia – regularly engage with members of the Indian diaspora, including through the Australia India Business Council, Australia India Chamber of Commerce, Australia India Institute,

India Australia Business & Community Awards, Australia India Youth Dialogue, and a range of other platforms focused on trade and investment and student alumni networks. Austrade is partnering with the India Australia Business and Community Awards to showcase the success of the Indian diaspora in injecting momentum into the trade and investment relationship and building two-way market literacy among the business community.

The Department of Education, Skills and Employment engages with the Indian diaspora through the Australia India Institute's research and projects that seek to strengthen and promote greater understanding and engagement between Australian and Indian education providers, teachers and students.

The Australia-India Council has worked to elevate the achievements of the Indian diaspora in Australia, including through its competitive grants rounds and social media outreach.

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