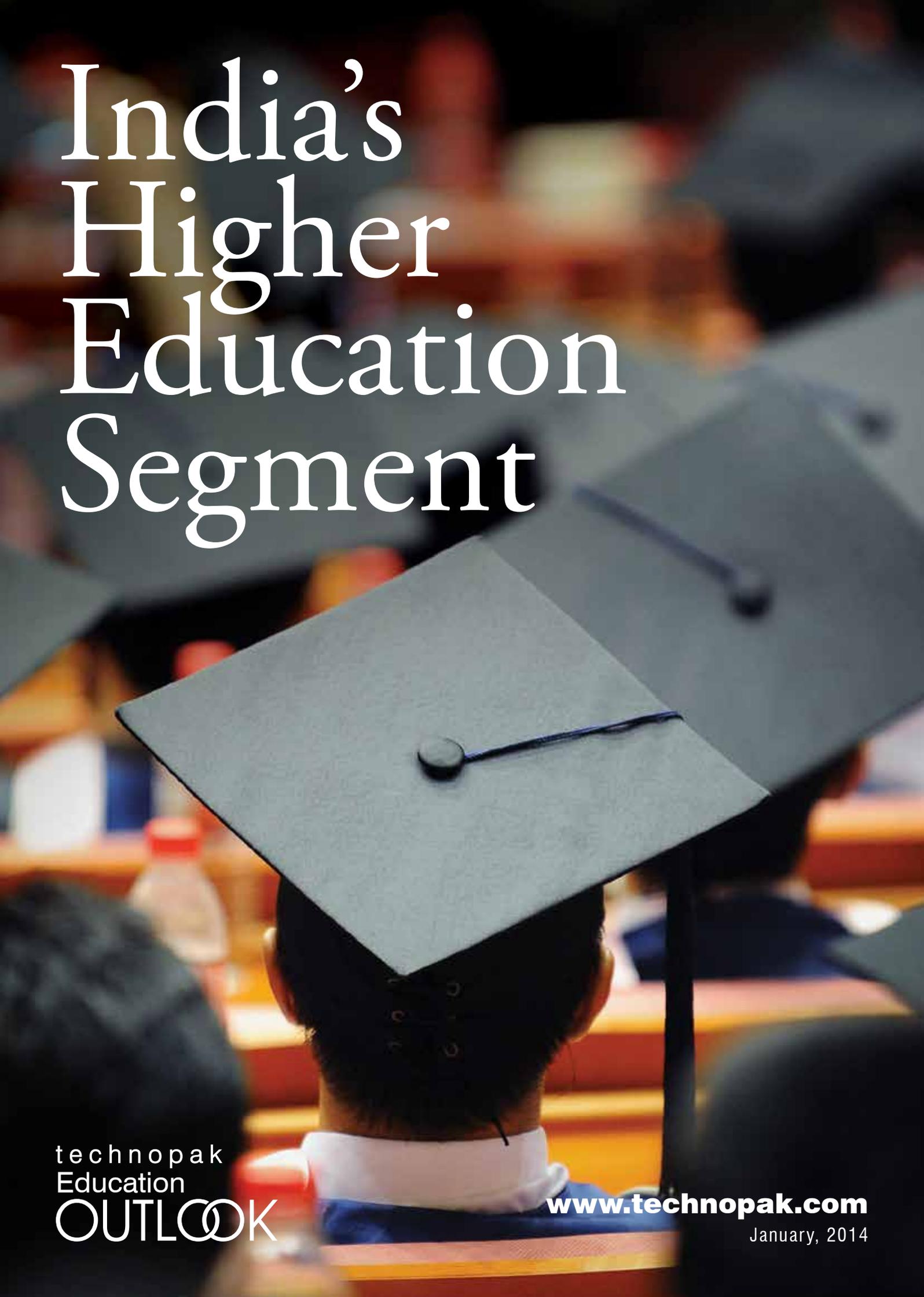


# India's Higher Education Segment

A photograph of a graduate in a black cap and gown, seen from behind, sitting in a lecture hall. The graduate is wearing a white shirt and a blue jacket. The background is blurred, showing other graduates and the interior of a lecture hall.

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OUTLOOK

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**Enayet Kabir**, Vice President, Technopak Advisors

## **About the Outlook**

The Indian Higher Education system is the largest in the world encompassing 20 million students and approximately 36,000 institutions. However, with the population of India expected to grow to over 1.5 billion by 2020, the capacity of higher education institutions needs to nearly double, to meet the targeted Gross Enrolment Ratio, or GER, of 30%, for the higher education segment. This will require an investment of USD 200 billion. If the rate at which the capacity in higher education has been developed by the government is any indicator, we will fall short of the target by a very large measure. Besides, the overregulation, and complexity, in the system creates a very high entry barrier for private participation, which we feel is one of the imperatives with respect to creating capacity with quality and efficiency. In this Outlook, we have tried to highlight some of the key trends and dynamics that are shaping Indian higher education, including the establishment of private universities.

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- Organic and Inorganic Growth Strategy
- Financial and Operational Modeling
- Marketing Strategy
- Innovation Strategy

### **Implementation**

Leveraging operations and industry expertise to 'commission' the 'concept' on a turnkey basis

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- Support for setting up Infrastructure
- Product Conceptualization and Development
- Support in Hiring Leadership Team

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Identifying and creating national and international partnerships across segments of Education

- Partnership Structuring
- Due Diligence of Partners
- Negotiations for JVs and Management Contracts

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- Due Diligence -Business
- Fundraising

### **Impact Assessment**

Assessing and Auditing running programs

- Assessment of Schemes and Policies
- Audit of Projects
- Advisory on course to meet objectives

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# Introduction

Higher education in India is all set for an unprecedented expansion, marked by an explosion in student enrolment, a substantial growth in the number of institutions and a quantum leap in the level of investment in education. The enormous challenge of providing equal opportunities for quality higher education, to an ever-growing number of students, is also a historic opportunity for correcting social imbalances, strengthening institutional frameworks, and surpassing international benchmarks of excellence.

India, with half its population below the age of 25, is all set to either reap the demographic dividend, or plunge to disaster depending on how the youth are educated. This is the “challenge and opportunity” that all stakeholders need to address by charting out a path and, most importantly, implementing it with discipline. This discussion attempts to highlight the key role which Private Universities can play in tackling extant challenges.

## Overview

India's Higher Education system is the largest in the world in terms of number of institutes (700 universities and institutes of national importance, and 35,539 colleges) and third-largest in terms of enrolment (20 million), just behind China and the USA. Despite this, the Gross Enrolment Ratio (GER) in higher education in India is 19%, compared to the global average of 26%. The government has set an aggressive target of achieving a GER of 30% by 2020. As per our estimates, to achieve this target, 20 million additional seats are required, entailing a total investment of around USD 200 billion.

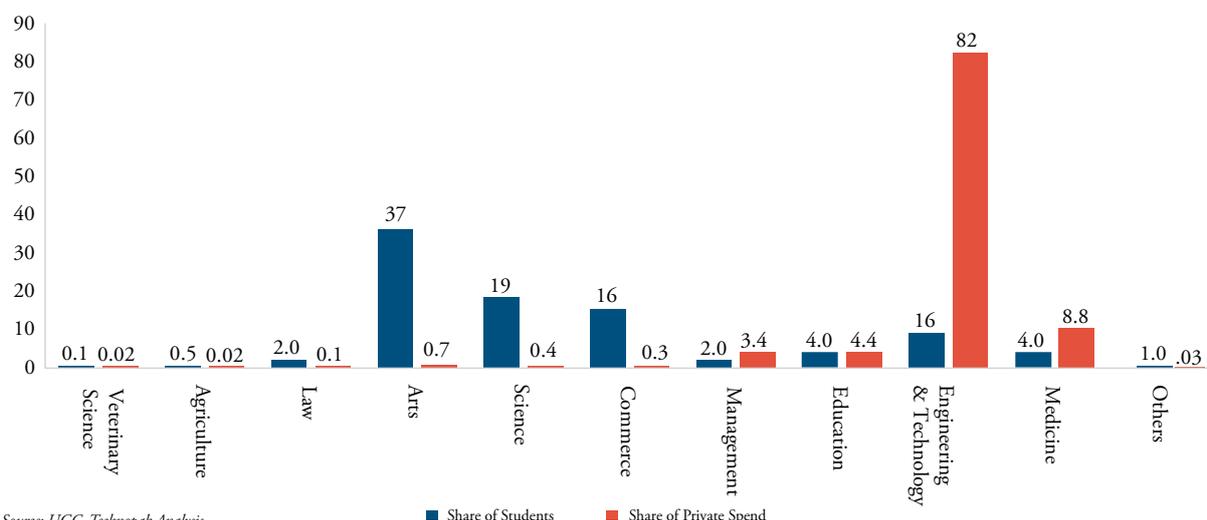
The higher education segment has witnessed a tremendous growth since India's independence. In the past six decades, the number of universities has jumped 41 times while the number of colleges has increased by over 71 times, and students' enrolment has surged 97 times.

## Market Size

The Indian higher education segment is currently estimated at around USD 11 billion. Exhibit 1 provides details about the higher education market both in terms of the number of students and in terms of private spend. It is evident that although Arts contributes the maximum in terms of number of students (over 37%), its contribution in terms of market size is less than 1 percent. Engineering & Technology, on the other hand, accounts for 16% of the enrolled students, yet accounts for over 82% of the market.

Exhibit 1

**Composition of Higher Education Market (%)**



Source: UGC, Technopak Analysis

## Regulatory Framework and Government Initiatives

India’s higher education segment is overregulated and yet under-governed. There are multiple regulatory bodies with overlapping roles and responsibilities. Further, education is included in the Concurrent list of the Constitution, which implies that it is under the purview of both the central government as well as individual state governments.

Exhibit 2

### Indian Higher Education Regulatory Framework

Multiple Governing Bodies	Role and Responsibilities
Ministry of Human Resource Development (Department of Higher Education)	Regulating and coordinating education in India, including higher and technical education; coordinating and cooperating with central and state governments through the Central Advisory Board of Education (CABE)
University Grants Commission (UGC)	Coordinating, determining and maintaining standards in institutions of higher education; releasing funds
State Governments	Funding higher education and determining administrative and operational issue
Statutory Professional Councils (AICTE, MCI, ICAR, NCTE, DCI, PCI, INC, BCI, CCH, CCIM, CoA, DEC, RC, and SCoHE)	Recognizing courses; promoting professional institutions; providing grants and various awards to undergraduate programs

Source: UGC, Technopak Analysis

### Rashtriya Uchchar Shiksha Abhiyan

The Rashtriya Uchchar Shiksha Abhiyan (RUSA) is a centrally-sponsored scheme for reforming the higher education system, thereby making institutions more accessible, more equitable, and offer better quality. Under RUSA, funding will be provided to state-owned institutions of higher education in order to enable them to focus on more strategic issues pertaining to research, the quality of professors, and innovations in teaching-learning, rather than simply administering and conducting exams.

The 12th Five -Year Plan focused on bettering access to, quality of, and equity in education in India. Headway has been made in K-12 education with the success of such government schemes as the Sarva Shiksha Abhiyan and the Rashtriya Madhyamik Shiksha Abhiyan. However, little has been done in the higher education space due to the lack of concerted efforts.

Over 94% of students are enrolled in state higher education institutions, of which 33% of the universities, and 51% of colleges, do not have access to government funding, resulting in the deterioration of quality and an ever-decreasing focus on research.

Under RUSA, the government proposed an investment of INR 22,855 crore, with INR 16,227 crore coming from the Central government and INR 6,628 crore by various state governments. Around 300 state-run public universities and 13,000 colleges will be covered by such funding. Also, 80 new universities will be created by converting autonomous colleges or colleges-in-a-cluster to state universities; 100 new colleges will be set up; and 54 existing colleges will be converted into model degree colleges.

# Emerging Trends

## The Internationalization of Higher Education

With the emergence of global knowledge economies, the internationalization of higher education has come to dominate the discourse among policymakers, practitioners, and parents. With 200 thousand students emigrating annually from India for higher education and Indian institutes being involved in over 700 international collaborations, students and parents are increasingly seeking ways to garner the benefits of global interconnectedness.

International tie-ups broadly help in developing curricula, providing affiliation to a reputed brand, assisting in the transfer of knowledge, placing students, and fostering student and faculty exchange programs. However, for a partnership to fructify, both the parties need to have a shared vision, common interests, and deep trust in each other. Quite often, partners are in different stages of their learning cycle, their organizational structures are not aligned, and their cultures differ. While one partner may focus on commercial success, the other may be keen on widening the knowledge base and improving research potential. In recent years, Indian institutions are gradually crossing these barriers and aligning themselves with international partner institutions. Several foreign players have established a number of collaborations with Indian institutes, some of which include:

- Shiv Nadar University and Carnegie Mellon University will offer undergraduate programs in Engineering.
- O P Jindal Global University and Indiana University have collaborated on several fronts. However this is a non-degree awarding relationship.
- Nottingham Trent University (UK) and Welingkar Institute of Management Development & Research (Mumbai), for Bioinformatics program.
- International Hotel Management Institute (Switzerland) and Kohinoor – IMI Khandala School of Hospitality Management.
- London School of Economics & Political Science (UK) and City School of Social and Managerial Sciences (Chennai).
- SKIL Education and Strathclyde University have joined hands to provide undergraduate and postgraduate programs in management.
- Warwick University (UK) and Institute of Technology and Management (Gurgaon) are offering engineering courses.
- Educomp and Raffles, Singapore are offering design courses.
- Core Projects and Oxford University have joined hands to provide teacher training and capacity building courses.
- GD Goenka and Lancaster University are offering management programs.
- MARG Group and Virginia Tech will offer courses in Nanoscale science and engineering, Nano biotechnology, biotechnology, information technology, and automotive engineering.

These tie-ups and partnerships augur well for this segment. The foreign players will bring in their “Body of Knowledge”, mature processes, and professionalism, and thus help impart high quality education in India.

## New Education Paradigm

India is seeing an influx of world class education infrastructure despite several challenges. New breeds of institutions are being spawned by large corporate entities and educationists that aim to set global benchmarks. Some of the new progressive initiatives which boast of state-of-the-art infrastructure and education programs include:

**Azim Premji University:** A private university set up in Karnataka with an aim to develop leaders and faculty for the education sector. The institution’s mission is to actively connect higher education with the betterment of lives of the disadvantaged in India. The university aims to set and encourage exemplary standards of teaching, learning, and

research; provide such education as to create better members of society; and contribute to social change via the social impact of education. It encourages the development of the learning individual, whether faculty or student, and seeks to nurture a community of lifelong learners.

**Ashoka University:** Acknowledged as India's first Ivy League-caliber liberal arts college, Ashoka University will be offering faculties exclusively in Humanities and Social Sciences. It already has partnerships in place with a number of western universities including Oxford, Yale, the Universities of Michigan and Pennsylvania, Sciences Po in Paris and Carleton College in US.

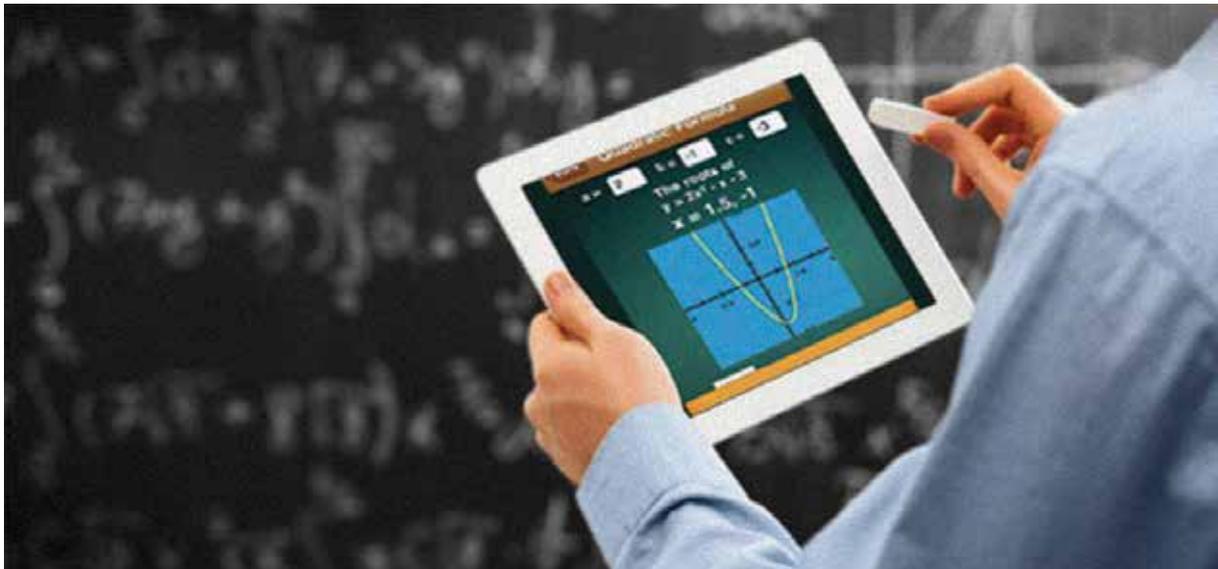
**Lavasa Education Hub:** This education-themed sub-city has tied up with Ecole Hoteliere de Lausanne; and IBR, Berlin University, to create a world-class, integrated education destination catering to all segments of society.

**TeamLease University:** TeamLease has entered into an agreement with the Government of Gujarat to set up TeamLease University (TLU), comprising 22 community colleges across the state. This will be India's first university for vocational education, focusing on strong employer connections, learning-by-doing, vertical mobility from diplomas to degrees, and providing quality at scale. It will offer quality education through four modes, i.e. physical, satellite, e-learning, and on-the-job.

### Massive Open Online Courses (MOOC)

MOOCs have become pervasive in India over the past couple of years. Even so, the top three US-based MOOCs, viz. Coursera, EdX, and Udacity, registered the largest number of non-US enrollments from India. While the penetration of the Internet in India is under 10%, the total enrollment from India in Coursera and EdX was 10% and 13%, respectively.

Indian students are increasingly opting for MOOCs for a number of reasons: they emerged as one of the cheapest options despite providing high quality content, impart premium international education at your doorstep at a time of your choice, and offer a personalized learning experience with a wide and diverse assortment of courses from which to choose. With the advent of MOOCs, the dream of thousands of Indian students has been turned into reality.



From the Indian perspective, the National Program on Technology Enhanced Learning (NPTEL) is one such example. It is an initiative by seven Indian Institutes of Technology (Bombay, Delhi, Guwahati, Kanpur, Kharagpur, Madras, and Roorkee) and the Indian Institute of Science (Bangalore) for creating course content in engineering and science. One of India's first MOOCs, WizIQ, provides courses in diverse fields, including study material for entrance examination preparations, on technology and programming, speed mathematics, language, music, and lifestyle, and allows students and educators to meet online in virtual classes. It also develops customized content for organizations as per their needs and offers training solutions in virtual classrooms.

## Growing Value of Accreditation

Accreditation is an institutions' (or some of its programs') compliance with certain regulatory standards and is a definitive indicator of the quality of education.

The Association to Advance Collegiate Schools of Business (AACSB) is a US-based international accreditation body whose mission is to further provide quality in management education worldwide through accreditation, thought leadership, and value-added services.

As of April 2013, there were 687 institutions with AACSB accreditation across 50 countries. The Indian School of Business (ISB) in Hyderabad is the first business school in India with AACSB accreditation. T.A. Pai Management Institute is the only other AACSB-accredited institution in India.

In the context of Indian higher education, accreditation should gain a lot of traction as the landscape is marred by several poor quality institutions, and accreditation provides them with an opportunity to differentiate. India already has an accreditation body in place in the form of the National Assessment and Accreditation Council (NAAC), which is an autonomous body established by the University Grants Commission (UGC) of India. As part of the accreditation process, each university is required to comply with the rules and regulations prescribed by the UGC in the Establishment and Maintenance of Standards in Private Universities Regulations, 2003, and further amendments.

The National Accreditation Regulatory Authority for Higher Educational Institutions Bill, 2010, is pending the approval of the Parliament. It seeks to establish, and make compulsory, a mechanism to accredit all higher educational institutions. This will ensure that students have access to information about the quality of an educational institution and the courses offered therein.

## Faculty Shortage

India has been facing an acute shortage of faculty in higher education. There is not only a 30% shortfall in the number of faculty members but also a huge challenge in terms of the quality of the extant faculty. As can be seen from Exhibit 3, the Indian higher education system currently needs 1.37 million faculty members, as per UGC norms. However, the current faculty strength is only 0.93 million.

Exhibit 3

Faculty Requirement Analysis

	2013	2020
<b>No. of Students (mn)</b>	<b>19.9</b>	<b>31.9</b>
UG	17.4	27.4
PG	2.5	4.5
<b>Faculty:Student Ratio (as per UGC guidelines)</b>		
UG	15	15
PG	12	12
<b>Faculty Required (mn)</b>	<b>1.37</b>	<b>2.19</b>
UG	1.16	1.82
PG	0.21	0.37
Current Faculty	0.934	
Faculty Shortage	0.44	1.26
Annual Faculty Requirement (until 2020)		0.18

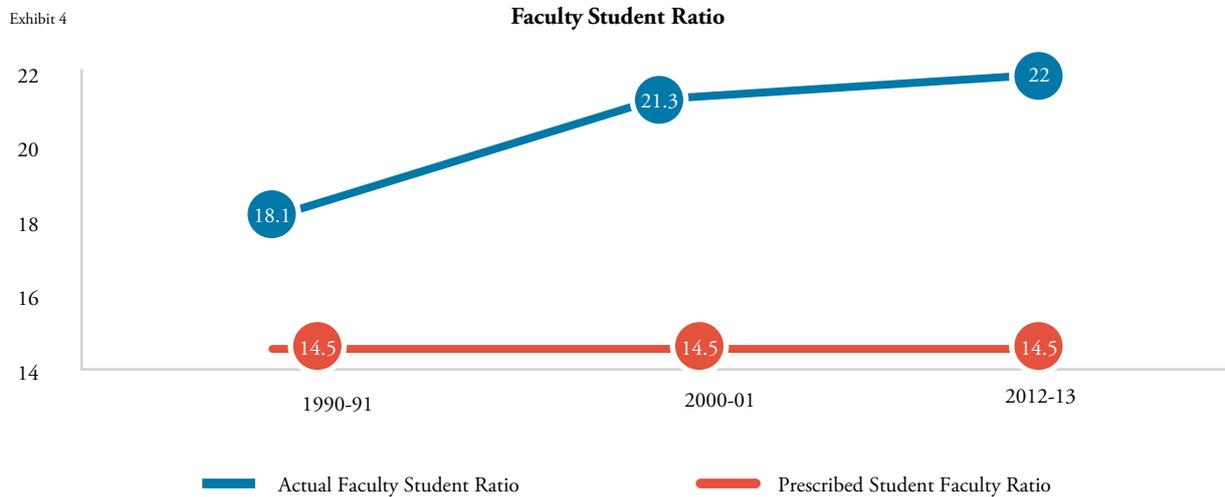
UG: Undergraduate; PG: Postgraduate

Source: Technopak Analysis

Considering that we aim to achieve a GER of 30% by 2020, we need to add -0.2 million faculty members every year. The faculty-to-student ratio has also been stagnant for almost two decades now. Exhibit 4 compares the prescribed faculty-to-student ratio (weighted average of UG and PG, based on the assumption that 86% are enrolled in UG courses and the rest in PG) and the actual ratio.



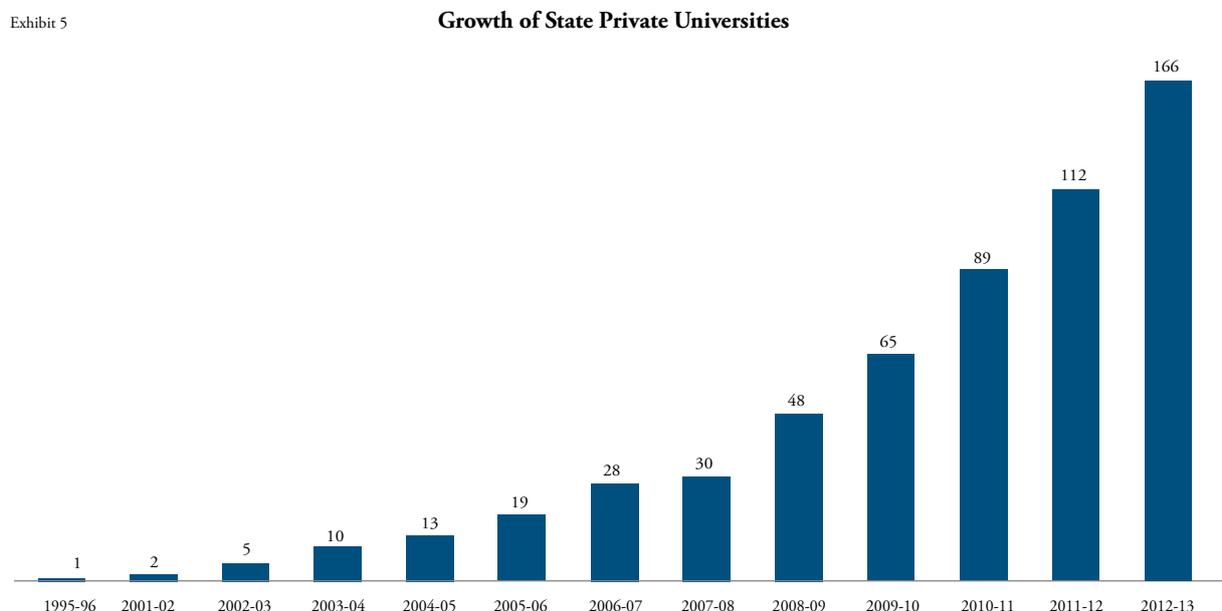
The problem of faculty shortage is consistently severe across premier institutions like the IITs as well as second- or third-rung colleges. The government recently allowed institutions to hire expatriate Indians to make up for faculty shortage. The IITs, for example, have been allowed to appoint Non-resident Indians (NRIs) and Persons of Indian Origin (PIOs) to permanent faculty positions. Foreign nationals can also be appointed on a contract basis for a fixed tenure not exceeding five years.



Source: Technopak Analysis

### Growth of Private Universities

The establishment of private universities has been another important achievement in the history of the Indian higher education segment. It allows private participation in the expansion of higher education and research. State private universities have witnessed a tremendous growth in the past six years, as illustrated in Exhibit 5.



Source: UGC, Technopak Analysis

State Private Universities (SPUs), as the name suggests, are set up through an enabling Act by State legislatures. Currently, 18 Indian states provide for establishment of Private Universities. One of the limitations of a State Private University is that it cannot grant affiliation to other colleges.



# Need for Private Universities

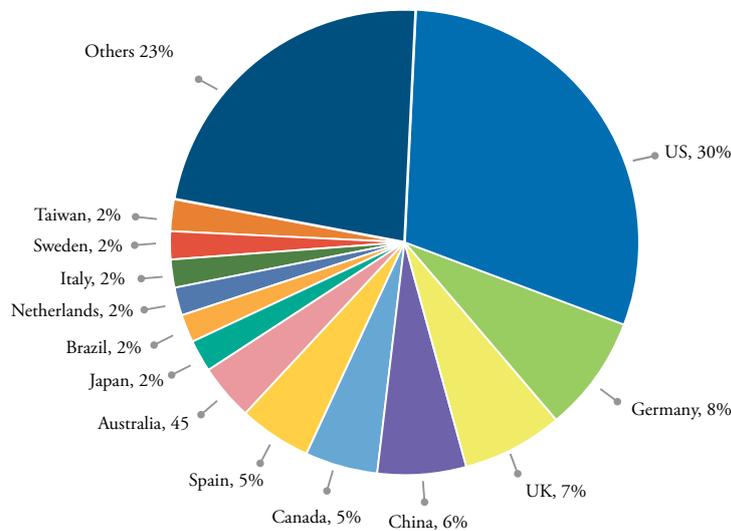
While adding more institutions to what is already the largest higher education system in the world might be counterintuitive, this is necessitated by a great demand for higher education and the lack of quality in the current system. As per Webometrics's 2013 ranking of global universities (21,451 universities), only IIT Bombay and IIT Madras made it to the list of top 500 universities in the world. Even in the Asian rankings, only IIT Bombay, (rank in Asia of 43; World Ranking 294) and IIT Madras, (rank in Asia: 72; World Ranking: 419) made it to the list of top 100 universities. This dismal statistic is repeated across numerous reports, issued by other ranking agencies, and is therefore a cause for concern.

Another question that arises from the above analysis is how countries like the US are able to put in place an effective higher education system and what we can learn from them. One of the reasons is the average age of these education systems. It is understood that creating education systems of excellence is a time-consuming and continuous process - it can take anywhere between 50 to 100 years to make a university a world-class educational institution. Most of the top university systems across the world have existed for a century or more. For example, Oxford University, UK, was founded in 1096, University of Cambridge, UK, in 1209, and Harvard University, USA, in 1636.

Only two Indian institutions feature in the list of top 500 universities in the world. There is also a remarkable difference in the revenue streams of these universities vis-à-vis Indian universities; a large proportion of their revenues are made up by endowments and research grants which help these institutions undertake cutting edge research. Further, the top 10

Exhibit 6

**Top 500 Universities: Country-wise Distribution**



Source: Webometrics 2012, Technopak Analysis

universities each hold anywhere between 500 and 4,000 patents. Remarkably, 68% of all patents filed worldwide thus far have been in the US. In absolute numbers, patents filed by the US amount to 440,629, while the corresponding number for India is around 15,896.

Another telling statistic is the number of Nobel Prizes; 839 Nobel Prizes have been given from 1901 to 2012, of which only 12 have been awarded to people born in India. The University of Calcutta stands alone in producing a Nobel Laureate from India; it was while working here that Sir C.V. Raman was awarded the Nobel Prize in Physics in 1930. Also, as discussed earlier, the government alone may not be able to deliver the massive investment required to build capacity in the higher education segment, pegged at USD 200 billion. Private participation in education is an accepted and successful phenomenon abroad. This can be seen from Exhibit 7, which highlights the fact that most countries allow the operation of ‘for profit’ higher educational institutions.

Exhibit 7

**Higher Education Regulations: Country-wise**

Country	Higher Education Regulations
US	Highly developed for-profit higher education market with large and listed players including Apollo and DeVry
UK	Higher Education Act of 2004 allows for for-profit, degree granting institutes
Singapore	For-profit private universities are allowed. Foreign universities can also set up institutes in Singapore
Korea	Private universities are strictly restricted from being for-profit. They also have limited autonomy in selecting students
Australia	For-profit private universities/colleges are allowed
Brazil	No restrictions on profit-making in higher education, with the emergence of two listed players, Estacio Participacoes and Anhanguera Educacional Participacoes
India	Higher Education in India is not for-profit

Source: UGC, Technopak Analysis

With the aim of becoming a global super power in knowledge, India has embarked on a journey to revolutionize and modernize its age-old plans and policies. However, it is lagging in the execution of these novel policies and needs to look beyond conventional methods and incorporate multiple models to cater to existing demand. More focus is needed in providing quality teaching and improved learning methodologies.

With the private sector taking root in different aspects of higher education, Public Private Partnerships (PPPs) need to be strengthened further.



# Business Opportunity in Setting up Private Universities

## State Private Universities

As per Sec. 2(f) of the UGC Act, 1956, the term “University” refers to an institution established or incorporated by or under the remit of a Central, Provincial, or State Act, and includes any such institution as may, in consultation with the University concerned, be recognized by the Commission in accordance with the regulations made in this behalf under the Act.

- Each SPU, typically has an underlying State Act which defines the establishment and operation of the university.
- Some states have enacted umbrella legislations for setting up SPUs, e.g. Haryana. Other states pass specific legislations for the formation of SPUs.
- The legislations typically regulate SPUs on such parameters as application fee, land requirement, endowment fund, etc.
- There are currently around 166 SPUs across 20 Indian States.

Despite the regulatory hurdles and long lead time, setting up a private university presents a lucrative business opportunity.

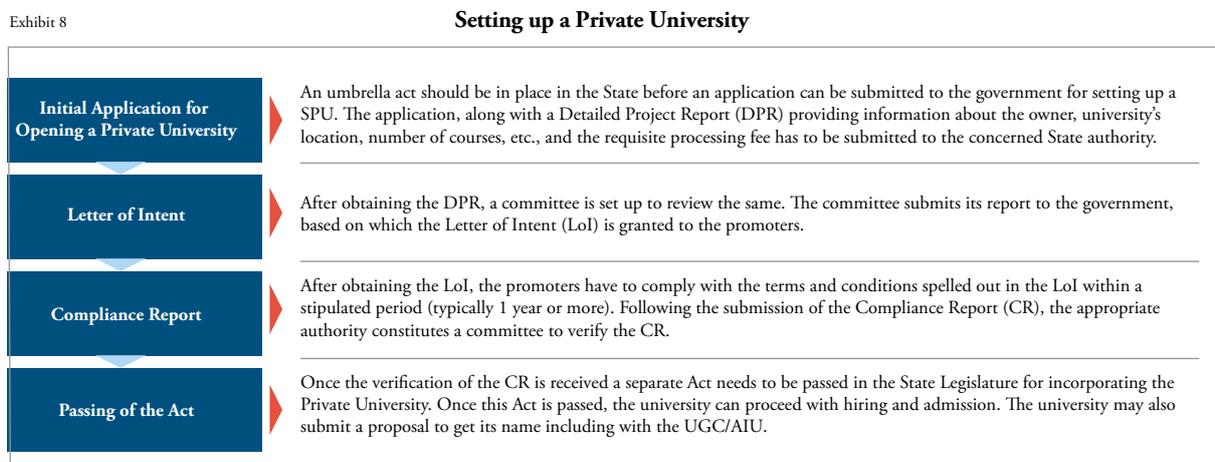
- While the business requires high upfront investment, it can prove to be highly profitable once it achieves critical mass.
- The higher education segment is more scalable as compared to other education segments from a single-location perspective. These institutions can also provide distance and vocational education courses.
- The negative working capital requirements and anti-recessionary nature are the other highlights of the segment.

## Conceptualizing a Private University

The vision to set up a world-class private university in India must encompass best-in-class faculty, administration, curriculum, and physical infrastructure. Such aspirations will also require unflinching commitment from the “promoters” to stay on course and constantly engage high quality associates, advisors, consultants, contractors, and other partners in implementation. The USP can be providing industry-ready graduates who can focus on the economies of the future, which may include high-growth countries as well as Brazil, Russia, India, China, and South Africa (the BRICS nations).

## The Process of Setting up a Private University

Establishing a private university typically takes at least 3 to 4 years. Exhibit 8 examines the process of setting up private universities, which may vary from state to state.

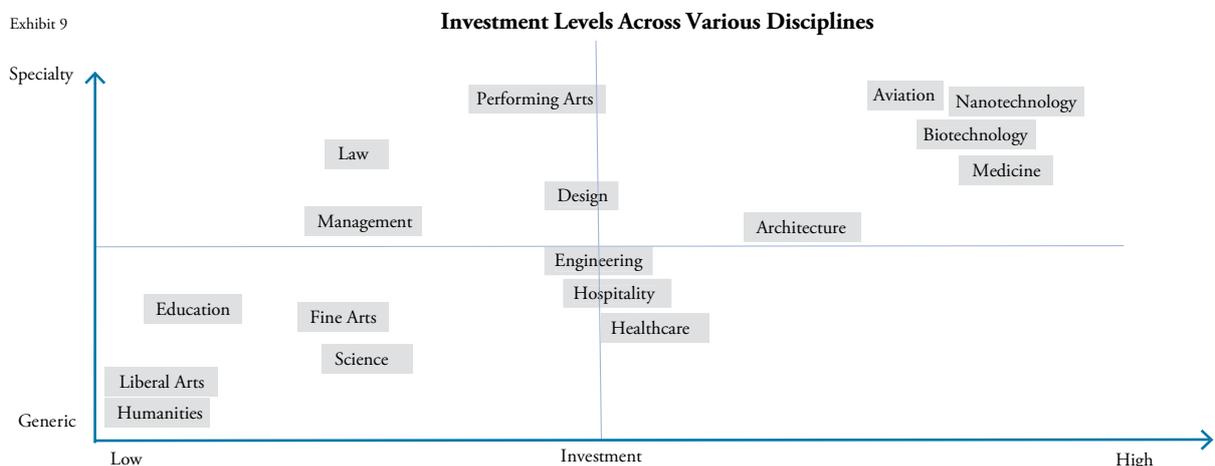


Source: Technopak Analysis

Apart from commercial reasons, private universities should also be set up for the purpose of creating a knowledge pool and tapping into research potential.

## The Financials of a Private University

It is important that new private universities create a niche for themselves and offer innovative and multidisciplinary courses. Exhibit 9 provides a choice of educational disciplines which a new private university can plan to offer, based on the investment required and the nature of the course.



Source: Technopak Analysis

The average cost per seat in a private university tends to be about USD 10,000 to USD 12,000, while the land area occupied by such universities is between 50 and 100 acres. The cost of setting up a world-class private university, which depends on the student intake and choice of course offerings, can be in the range of USD 30 million to USD 300 million. Based on the ramp-up and choice of courses, private universities can typically provide returns of 15-20% over a 10-year horizon.

### Exploring Funding Options

Funding educational ventures is a challenging task, with the funding of higher education institutions involving further complications. The commonly available funding options usually combine any of the following:

- Personal equity from the promoters
- Bridge equity from friends of the promoters
- HNIs approached through private banks and other institutions
- Long-term debts from banking institutions
- Industry support by way of sponsored chairs in certain specializations (10-15 chairs, with each costing between USD 300,000 and USD 500,000)
- Sponsor-supported sub-schools, e.g. Dr. Reddy School of Healthcare Management, ICICI School of Banking, Investment, Financial Services, etc.
- Development of hostels and other infrastructure outsourced to private equity firms or student housing companies

### Related Business Opportunities

The high project cost coupled with a long lead time, the lack of funding options, and the cumbersome regulatory process tends to create high entry barriers for most entrepreneurs wanting to set up a private university. However, we feel that there can be many related business opportunities which can be leveraged to ride on the growth of higher education institutions. If project cost is a bottleneck, one can set up colleges affiliated to existing universities, which involves less capital and time as compared to a private university. If capital is not a constraint, but lead time and regulations are, then there are quite a few service areas that present interesting business opportunities. These include allied infrastructure development, facility management, content development, outsourcing of training and assessment, etc.





We now discuss one such opportunity, i.e. the creation of student housing facilities. There are huge opportunities in setting up or managing on-campus or off-campus student hostel facilities. However, the student housing industry has already matured in developed countries like the USA but is still a new concept in countries like India.

Student housing companies provide an integrated platform that aims to create customer-focused, service-enriched student accommodation. They offer college students an opportunity to break away from mediocre apartments and overcrowded dormitories and provide an unmatched lifestyle.

These companies offer an array of services including site selection, financing, construction management, project management, and facilities management. Some of these companies like Campus Crest Communities and American Campus Communities are also listed on American stock exchanges. They can also issue tax exempt bonds to raise capital for the projects. These companies allow universities to channel their finances towards creating academic infrastructure.

### Conclusion

The time is ripe for the government and private sector entities to direct resources to higher education. While the government can contribute by providing free land and tax exemptions to private players and easy loans to students, corporate entities can form a large corpus to fund scholarships and research. The Indian higher education segment is on the verge of a major breakthrough, with the demand for quality education and the paying capacity of Indian students creating a win-win situation for those who seek quality education as well as those who have the wherewithal to provide the same. The chance to explore opportunities to strengthen international collaborations, set new benchmarks for quality, and put in place a regulatory framework which ensures that deserving private players get funding for these institutions and thereby participate in this opportunity, is now.

# About Technopak

India's leading management consulting firm with more than 20 years of experience in working with organizations across consumer goods and services.

Founded on the principle of “concept to commissioning”, we partner our clients to identify their maximum-value opportunities, provide solutions to their key challenges and help them create a robust and high growth business models.

We have the ability to be the strategic advisors with customized solution during the ideation phase, implementation guide through start-up and a trusted advisor overall.

Drawing from the extensive experience of more than 150 professionals, Technopak focuses on four major divisions, which are Fashion - Textile & Apparel, Retail, Consumer Products & E-tailing, Education, and Food Services & Agriculture.

## Our key services are:

**Business Strategy:** Assisting in developing value creating strategies based on consumer insights, competition mapping, international benchmarking and client capabilities

**Start-up Assistance:** Leveraging operations and industry expertise to ‘commission the concept’ on a turnkey basis

**Performance Enhancement:** Operations, industry and management of change expertise to enhance the performance and value of client operations and businesses

**Capital Advisory:** Supporting business strategy and execution with comprehensive capital advisory in our industries of focus

**Consumer Insights:** Holistic consumer and shopper understanding applied to offer implementable business solutions



# Our Other Divisions

## Retail, Consumer Products & E-tailing

Technopak aids retailers and consumer product companies in formulating growth strategy and performance enhancement mandates. Over the past two decades, we have worked on various facets such as entry into the Indian market, development of new category, activation of new retail formats, channel development, product extension, region expansion etc. One key reason why Technopak is considered the industry leader is the relentless focus on the Indian Market. We help clients understand the market dynamics in India and help them arrive at the best method to grow business in India. Our Retail and Consumer product expertise helps gain a competitive edge by providing execution capabilities and corporate strategies.

## Fashion - Textile & Apparel

With almost 20 years of experience in delivering end-to-end solutions to the entire gamut of the textile industry, right from fibre to retailing, the Fashion division at Technopak assists the textile and apparel organizations in optimizing their profits through enhancement and expansion. Many leading Indian and international Textile manufacturers and Apparel brands have benefited from our offerings in the areas of business planning and strategy, apparel operations, supply chain management and strategic alliances. Our team consists of top calibre advisors who have worked closely with a diverse group of clients comprising textile manufacturers, apparel retailers, garment manufacturers and exporters, apparel sourcing organizations, trade promotion councils, industry associations, international development bodies, and financial institutions as well as central and state governments.

## Food Services & Agriculture

Technopak's Food Services & Agriculture team comprises of established domain experts who build and enhance the business performance of organizations which are either working in the segment or are willing to enter it. Our end-to-end solutions are customized as per the business's requirements and capabilities. We continuously strive to create strong industry relationships and work for a global footprint by delivering a wide range of services to organizations that operate or wish to operate in the Food and Agriculture sector, in India as well as internationally.

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