

The background of the slide is a photograph of a graduation ceremony. It shows a large group of graduates in black gowns and mortarboard caps. The focus is on a graduate in the foreground, seen from the back, wearing a cap with a pink tassel. The background is filled with other graduates, some wearing yellow stoles, and is softly blurred with warm, golden light.

**Management
Consulting**
Education & Skilling

BDO in India
2024

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About the Sector

Overview of Education & Skilling Sector in India

India's education system is the second largest in the world permitting 'for-profit' operations in most categories

Coaching & Tutoring

Unregulated sector with a number of large players.
USD 50bn market projected to grow at 30% CAGR till 2028. Key focus area for EdTech companies too

Vocational Education

Focus area of the government which seeks to provide viable employment opportunities to millions. Unregulated sector with policy and financial support

Higher Education

'For profit' campuses permitted for foreign universities/ institutions only. 43 million students enrolled (GER: 28%)

Executive Education

Certification programmes being offered in management, technology, data science and others for working professionals

K12

Partially regulated with 'for-profit' operations permitted. Over 275 million students enrolled in public and private schools

Pre-School

Unregulated with high demand for premium facilities with attached day-care centers



National Education Policy 2020

Liberalisation is opening up business opportunities

Universalisation of education from pre-school to secondary level with 100% Gross Enrolment Ratio (GER) in school education by 2030

Liberalising Indian private schools by building relevant curriculum, integrating technology and focusing on cognitive skill development

Attracting private and foreign investment in the higher education sector to achieve the GER target of 50% by 2035

Multidisciplinary Education and Research Universities (MERUs) to be set up as models of best education of global standards in the country



Regulatory Landscape

Governed by the central and state government regulators

K12

- Central Board of Secondary Education (CBSE)
- Indian Certificate of Secondary Education (ICSE)
- State Boards

Higher Education

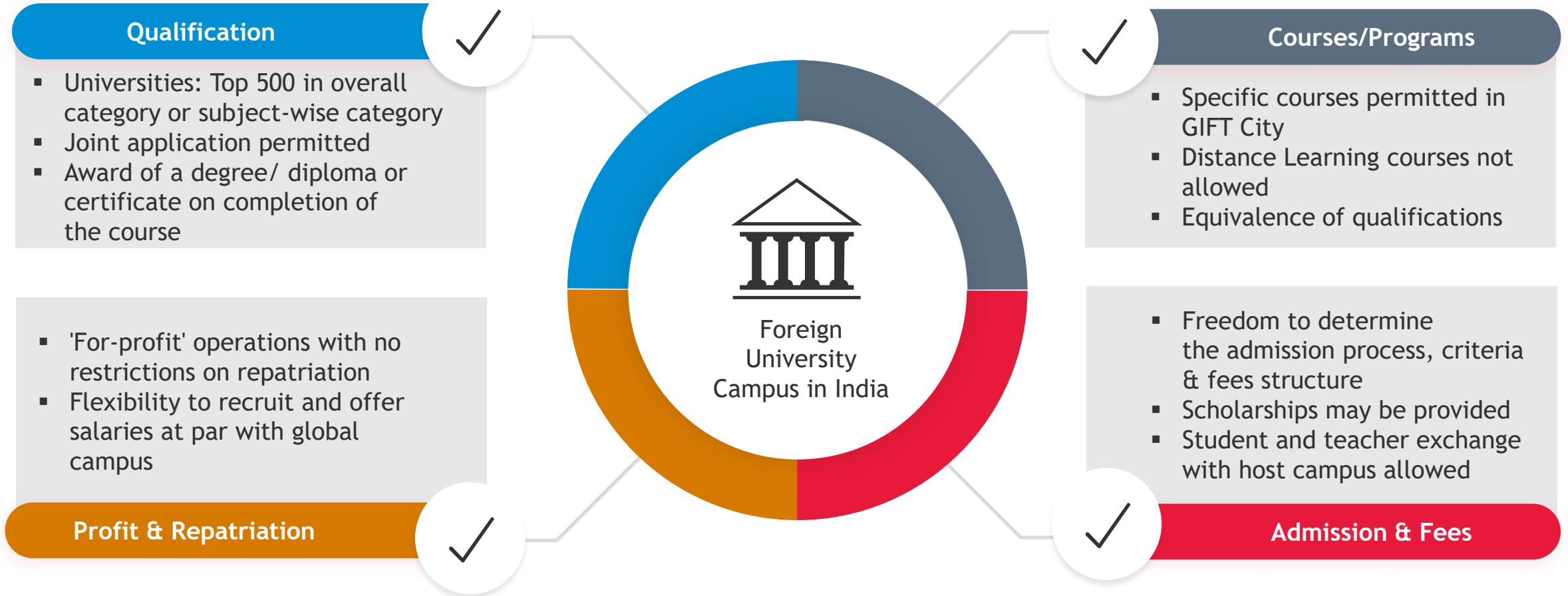
- University Grants Commission (UGC)
- All India Council for Technical Education (AICTE)
- Professional Councils

Skilling

- National Council for Vocational Education and Training (NCVET)

Key Provisions of Foreign Education Campus Regulations

Campuses can be set up across the country



Corporate Social Responsibility

Given the massive scope of social upliftment in the society, education & skilling sector is among the top 3 sectors preferred by corporates and not-for-profits for investment



Permitted Activity under Company Law

- Highest share of CSR funds went to the Education Sector in 2016-21
- Female education and providing livelihood skills in rural areas most popular
- Active partnership with NGOs and multi-laterals working in this sector



Proximity with the Government

- Priority sector for the government leading to close coordination
- Projects identified for corporate participation
- Helps in building strong relationship with the Centre and State Governments



Brand and Reputation

- Builds positive brand image in the society and the country at large
- Increase in reach and visibility in rural India as a responsible brand
- Improved media and external stakeholder perception

Service Offerings

Education & Skilling Consulting

An overview of our solutions



India & Sector Entry

Setting Up Institutes and
Campuses in India



Partnerships

Strategic and Academic
Partnerships, Joint
Ventures



Policy and Approvals

Advisory
and handholding



Transactions

Commercial
and Technical Due-
Diligence



CSR

Project
identification,
assessment and
monitoring

Service Offerings

Dedicated team with rich experience and on-ground expertise advising government, not-for-profits, foreign universities, domestic academic institutions, edtech and the investor community

Pre-K12, K12, Higher Education and Skilling	EdTech and Coaching	Government and Not-for-Profits	Corporate Social Responsibility
<ul style="list-style-type: none">▪ India Entry Strategy for setting up operations▪ Policy advisory and approvals▪ Location assessment and competition analysis▪ Market and demand assessment▪ Building an effective Target Operating Model (TOM) and Standard Operating Procedure (SOP)▪ Partner identification and negotiations▪ Technology assessment and advisory for ERP and e-learning	<ul style="list-style-type: none">▪ Opportunity identification and strategy formulation▪ Online and offline demand assessment▪ Global and peer benchmarking▪ Management consulting for building a profitable business model▪ Identifying organic and inorganic growth opportunities through fund raising, acquisition, partnerships and divestments▪ Negotiation and due-diligence support	<ul style="list-style-type: none">▪ Assistance in building strategies for conceptualising reforms▪ Policy development and advisory support▪ Detailed execution planning and implementation support▪ Due-diligence support▪ Public-Private partnership advisory and assistance▪ Program design, implementation and support▪ Capacity-building strategies for standalone institutions	<ul style="list-style-type: none">▪ Baseline and impact assessment studies▪ Project identification and partner search▪ Company Law compliances and reporting▪ Project Management Office (PMO) Support▪ Gap Analysis and benchmarking▪ Peer CSR review and benchmarking▪ Project implementation and reporting

Team Credentials

Sector Lead



ROHIN KAPOOR

Partner - Education & Skilling
Management Consulting
Business Advisory Services

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AREAS OF EXPERTISE

- Entry Strategy
- Regulatory Advisory and Approvals
- Academic and Strategic Partnerships
- Project Reports and Project Management
- Operating Model and SOP
- Due-Diligence

INDUSTRY EXPERTISE

- Higher Education
- School Education
- Skill Development and Vocational
- CSR and Not-For-Profit

EDUCATION & PROFESSIONAL QUALIFICATIONS

- Masters in Business Administration
- Bachelors in Computer Applications
- Certificate Course in Education

EXPERTISE SUMMARY

- Rohin has 18 years of experience in the education, skill development and not-for-profit sector. He has been advising public, private sector, foreign universities and not-for-profit foundations on aspects related to growth, India entry, operational strategies, business consulting and location assessment, partnerships, marketing, benchmarking and regulatory.
- He has been a member of the education and skill development committees of reputed industry chambers of commerce (CII, PHDCCI) and has authored over 70+ reports and articles on the need for urgent reforms in the sector.
- Earlier, he worked with large accounting and advisory firms.












SELECT KEY PROJECTS

- JV partnership and implementation assistance to a foreign K12 group for setting up schools in India
- Acquisition and rebranding of schools across India by a reputed group of schools
- Academic and strategic collaboration between a US University and one of the top IITs to offer joint executive MBA Program
- Setting up of India campus of an Italian educational institute to offer MBA and executive management courses
- Strategy formulation and benchmarking for setting up tutorials business by one of India's largest media groups

Select Experience

Our team has worked across solutions and segments in the sector

Non-exhaustive

India-entry strategy, partner search, due-diligence and JV advisory for an international K12 Group 	Market assessment, demand analysis, competition landscaping, location identification and regulatory review for a top-ranked business school based out of Italy 	Partner search, commercial and technical due diligence, TOM, entity analysis for offering a joint EMBA program by a top-ranked American and Indian universities 	Partner search, due-diligence and related advisory for acquiring higher educational institutions by a US-based listed educational company 
Policy advisory, program funding, monitoring and five-year planning support for a higher education partnership between Indian and British Governments for student and teacher exchanges 	Joint venture advisory, location assessment, market entry, investment structuring and contract negotiations assistance for an American group partnering an Indian media house 	PPP advisory services for techno-economic feasibility, regulatory support, bid management for setting up multiple skilling centers in the real estate sector 	India-entry strategy for a London-based K12 Group looking to set up Cambridge Curriculum schools in JVs with real estate developers/ domestic education groups 
Project identification, partner search, impact assessment, review and monitoring for a multi-lateral organisation in the vocational training sector 	Impact assessment of community school education including project coverage, effectiveness, framework, and enablers for a foundation backed by a large corporate house 	Advisory services including partner identification, due diligence, investment structuring, and entity analysis for an academic technology company 	Implementation assistance including policy advisory; arranging a meeting with regulators, and obtaining government approvals for setting up a private university 



Private and confidential

Why BDO India?

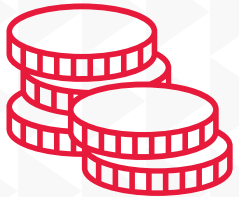


About BDO

About BDO

GLOBAL REVENUE

US\$ 14 billion

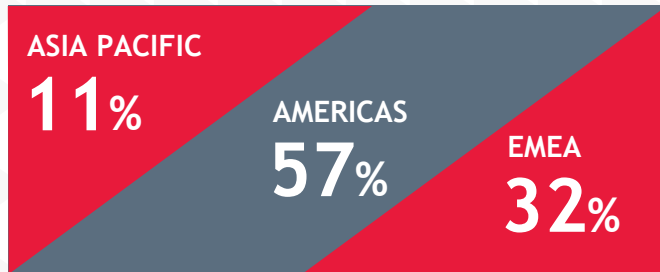


+10.2%*

REVENUE INCREASE

* (at constant exchange rates)

PERCENTAGE REVENUE BY REGION



1,776 OFFICES

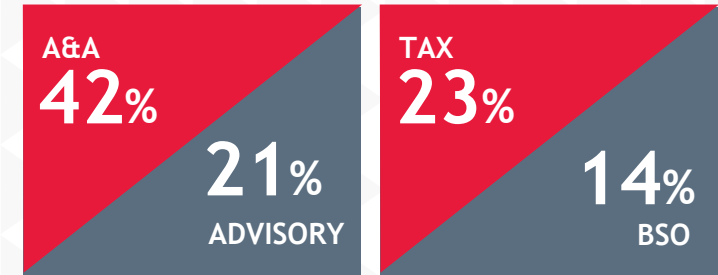
166 COUNTRIES & TERRITORIES



115,661

PEOPLE +3.9%

FEE SPLIT BY SERVICE LINE



*Note: Financial results are as of 30 September 2023

About BDO - Global Locations

In alphabetical order per BDO region*



*Dated 5 February 2024

BDO In India



TAX & REGULATORY SERVICES
ASSURANCE SERVICES
DEAL ADVISORY SERVICES
BUSINESS ADVISORY SERVICES
BUSINESS SERVICES & OUTSOURCING
ACTUARIAL SERVICES
DIGITAL



9000+*
STAFF



12
CITIES



18
OFFICES

88% OF OUR CLIENTS PERCEIVE EXPERTISE OUR PARTNERS BRING AS VALUABLE

87% OF OUR CLIENTS ARE SATISFIED WITH OUR SERVICE DELIVERY

AS ONE OF THE LEADING PROFESSIONAL SERVICES FIRMS IN THE COUNTRY, WE'VE EXPANDED OUR TALENT POOL OVER THE LAST 10 YEARS, BRINGING ON BOARD DOMAIN EXPERTS AND BUSINESS PROFESSIONALS TO OFFER OUR CLIENTS ADVICE THAT IS ASTUTE AND SUSTAINABLE. OUR ROBUST INDIA PRACTICE IS LED BY AN EXPERIENCED PARTNER & DIRECTOR GROUP WITH BUSINESS FORESIGHT AND EXPERTISE ACROSS INDUSTRIES.



300+
PARTNERS DIRECTORS



DELIVERING EXCEPTIONAL CLIENT EXPERIENCE

* This includes employees from our shared services centres in India

Our Services



ASSURANCE

- ▶ Accounting Advisory Services
- ▶ Financial Statement Audit and Attestation Services



TAX

TAX & REGULATORY SERVICES

- ▶ Corporate Tax Services
- ▶ Financial Services Tax
- ▶ Global Employer Services
- ▶ International Tax Services
- ▶ Private Client Services
- ▶ Tax Outsourcing
- ▶ Transfer Pricing

INDIRECT TAX

- ▶ Customs & International Trade
- ▶ Goods & Services Tax (GST)
- ▶ Indirect Tax Assessment & Litigation Assistance
- ▶ Incentives & ESG
- ▶ Tax Technology



ADVISORY

ACTUARIAL SERVICES

BUSINESS ADVISORY SERVICES

- ▶ Forensics
- ▶ Government Advisory
- ▶ IT Risk Advisory & Assurance
- ▶ Management Consulting
- ▶ Risk Advisory Services
- ▶ Sustainability & ESG

DEAL ADVISORY SERVICES

- ▶ Business Restructuring Services
- ▶ Corporate Finance and Investment Banking
- ▶ Deal Value Creation
- ▶ Financial Due Diligence
- ▶ M&A Tax and Regulatory
- ▶ Strategy & Commercial Due Diligence
- ▶ Valuations



BUSINESS SERVICES & OUTSOURCING

- ▶ Finance and Accounting Outsourcing
- ▶ Global Outsourcing
- ▶ Human Resource Outsourcing
- ▶ Payroll Management and Compliance Services
- ▶ Secretarial Services and Compliance Management
- ▶ Shared Service Centre Services



BDO DIGITAL

- ▶ Digital Services
- ▶ Technology Products and Solutions

Our Brand Promise

To be the leader for exceptional client service

by providing a level of **global expertise** combined with a **local understanding** of our clients' needs

The **global organisation has** strong national roots and **our firms are** experts in their local markets

BDO has a track record in supporting the international expansion of **our clients**

We offer sensible, actionable advice **grounded in** local knowledge and **backed by** regional and local experience



Why BDO

Leading adviser to the mid-market with client service at the heart



A GLOBAL ORGANISATION YOU KNOW CAN DELIVER

- BDO has 50 years of experience delivering accounting, advisory, tax, business services and consulting services
- We know your businesses and are poised to address your immediate and long-term service needs



A DEDICATED AND ACCESSIBLE TEAM

- High level of involvement from partners/ directors
- Access to specialised services teams
- Dedicated project management support to ensure deadlines are met and any potential issues are highlighted early on



INNOVATIVE SERVICES

- Flexible approach and methodology to manage the engagement efficiently
- Ideas for business improvements throughout the engagement



PROVEN SECTOR EXPERIENCE

- Our team brings in broad-based experience, knowledge and business savvy approach to our clients
- Our professionals are well versed with the challenges faced in your industry including new legislations and regulations



VALUE FOR FEES TO SUIT YOUR NEEDS

- Openness and transparency in pricing our work; no surprises
- Client service plan designed to identify and track issues and opportunities

For queries regarding our services, please [get in touch](#) with us

For any other comments or feedback, kindly write in to marketing@bdo.in

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Westgate Business Bay, Floor 6
Office No 601, Block A, Makarba
Ahmedabad, Gujarat 380051, INDIA

Bengaluru - Office 1
Prestige Nebula, Floor 3
Infantry Road
Bengaluru 560001, INDIA

Bengaluru - Office 2
SV Tower, No. 27, Floor 4
80 Feet Road, 6th Block, Koramangala
Bengaluru 560095, INDIA

Chandigarh
Plot no 55, Floor 5
Industrial & Business Park
Phase 1, Chandigarh 160002, INDIA

Chennai
No. 443 & 445, Floor 5, Main Building
Guna Complex, Mount Road, Teynampet
Chennai 600018, INDIA

Coimbatore
Pacom Square, Floor 3, 104/1, Sakthi
Main Road, Bharathi Nagar, Ganapathy
Coimbatore, Tamil Nadu - 641006

Delhi NCR - Office 1
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Office No. 1501-10, Sector-54
Golf Course Road, Gurugram 122001 INDIA

Delhi NCR - Office 2
Windsor IT Park, Plot No: A-1
Floor 2, Tower-B, Sector-125
Noida 201301, INDIA

Goa
701, Kamat Towers
9, EDC Complex, Patto
Panaji, Goa 403001, INDIA

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1101/B, Manjeera Trinity Corporate
JNTU-Hitech City Road, Kukatpally
Hyderabad 500072, INDIA

Kochi
XL/215 A, Krishna Kripa
Layam Road, Ernakulam
Kochi 682011, INDIA

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Floor 4, Duckback House
41, Shakespeare Sarani
Kolkata 700017, INDIA

Mumbai - Office 1
The Ruby, Level 9, North West Wing
Senapati Bapat Marg, Dadar (W)
Mumbai 400028, INDIA

Mumbai - Office 2
601, Floor 6, Raheja Titanium
Western Express Highway, Geetanjali
Railway Colony, Ram Nagar, Goregaon (E)
Mumbai 400063, INDIA

Mumbai - Office 3
Floor 20, 2001 & 2002 - A Wing, 2001 - F Wing
Lotus Corporate Park, Western Express Highway
Ram Mandir Fatak Road, Goregaon (E)
Mumbai 400063, INDIA

Mumbai - Office 4
The Ruby, Level 9, South East Wing
Senapati Bapat Marg, Dadar (W)
Mumbai 400028, INDIA

Pune - Office 1
Floor 6, Building # 1
Cerebrum IT Park, Kalyani Nagar
Pune 411014, INDIA

Pune - Office 2
Floor 2 & 4, Mantri Sterling, Deep Bungalow
Chowk, Model Colony, Shivaji Nagar
Pune 411016, INDIA

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