MANAGEMENT, PROFESSIONAL SKILLS AND ENTREPRENEURSHIP SKILLS COUNCIL – SKILLS GAP AND DEMAND AGGREGATION

INTERIM REPORT

PROGILENCE CAPABILITY DEVELOPMENT PVT.LTD.

910, DLF CITY COURT, SIKANDERPUR, GURGAON, HARYANA, INDIA 122002

Report Prepared By:

PROGILENCE Capability Development Pvt. Ltd.

Gurgaon, INDIA

FOR LIMITED CIRCULATION ONLY
THIS REPORT IS NOT FOR PUBLIC DISPLAY BUT FOR INTERNAL CIRCULATION ONLY

MANAGEMENT, PROFESSIONAL SKILLS AND ENTREPRENEURSHIP SKILLS COUNCIL – SKILLS GAP AND DEMAND AGGREGATION

INTERIM REPORT

(This page isintentionally blank…)

TABLE OF CONTENTS

MANAGEMENT, PROFESSIONAL SKILLS AND ENTREPRENEURSHIP SKILLS COUNCIL – SKILLS GAP AND DEMAND AGGREGATION

1. BACKGROUND

1.1. MEPSC

Management & Entrepreneurship and Professional Skills Council (MEPSC) was incorporated as a Section - 8 (Not for Profit Company) under the Companies Act 2013 on 15th December 2015.

MEPSC is promoted by All India Management Association (AIMA), the apex body of management profession in India as its sole promoter. As an Sector Skills Council, MEPSC's mission is to create technically and professionally competent workforce and industry professionals for both national and international markets.

MEPSC is considered a horizontal SSC with its functions spanning across sectors and industries.

The Skills Council is being steered by senior industry captains and experienced thought leaders. Mr. Sunil Kant Munjal, President, AIMA and Chairman, Hero Corporate Service is leading this initiative as Chairman of the MEPSC.

1.2. MEPSC RESPONSIBILITIES AS PER THE TERM SHEET

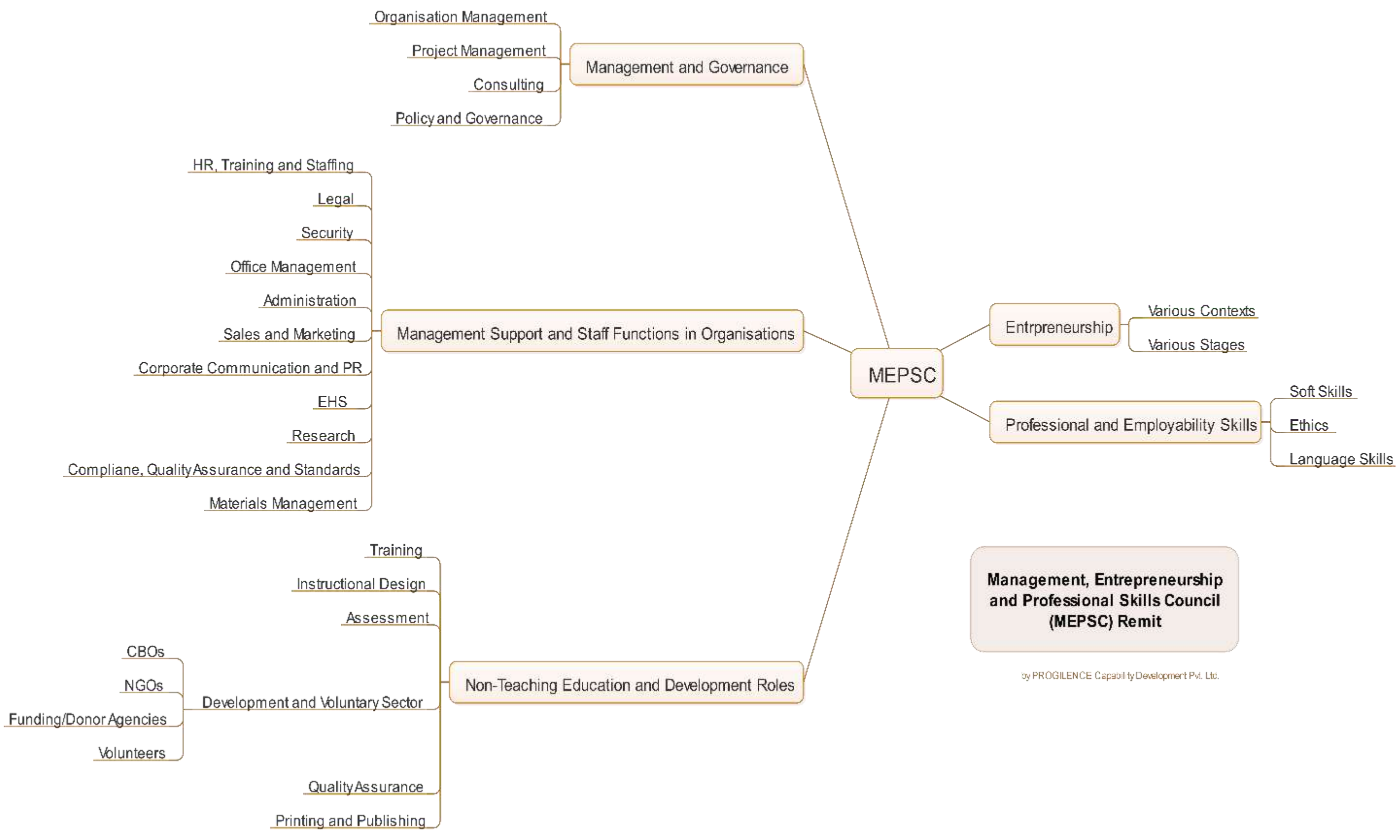
- Establishment of a well-structured Labour Market Information System (LMIS)
- Identification of skill needs across sectors/ functions roles including type of skills, range and depth of skills to facilitate Individuals and Employers. Development of a skill development plan and maintain skill inventory/ database.
- Determining skills/ competency standards and qualifications across sectors/ functions. Standardization of affiliation, accreditation and certification process.
- Plan and execute affiliation, accreditation, examination and certification, training of trainers, apprenticeship schemes.
- Promotion of academies of excellence, facilitate and catalyze Management & Management Services skill development initiatives.
- Development of partnership with various National/International stakeholders.

1.3. MEPSC FOCUS SEGMENTS

The Management, Entrepreneurship and Professional Skills SSC remit extends to the following functions as defined by the main categories outlined in the business case and term sheet approved by NSDC and related governing bodies.

- Management Skills
- Management Support Functions
- Consulting and Market Research
- Education - Non-Teaching
- Behavioural Skills
- Employability and Professional Skills

As over these time these have been unpacked and reconfigured with inputs from NSDC, the Ministry of Skills Development and Entrepreneurship this has come to be detailed out even further. A more current representation of these are provided below:



Further detailing may help identify additional functions in due course.

2. DEMAND AGGREGATION AND SKILL GAP STUDY

As part of their mandate they had prepared a scope of work for carrying out the demand aggregate and skills gap study for MEPSC remit. This included:

1) To understand the capacity building need for providing skilled human resource of the management sector
2) To analyse the entire sector and its characteristics
3) Demand and supply factors in terms of employment in the sector.
4) To identify and tap the geographical representation of the management sector.
5) To identify job roles for existing and projected skill gap (next 5 years) in the management sector
6) To assess current employment scenario (surplus or shortage of workforce) and forecasting to meet the HR needs of the industry (Demand Side)
7) Mapping of available skills training infrastructure in the management sector (Supply side)
    a. Available manpower supply – number of institutes offering programmes for the sector and number of students being trained each year by these institutes
    b. Gaps in training infrastructure and curriculum – available versus required infrastructure – Curriculum available; Present pedagogical practices versus required.

3. OBJECTIVE

The objective of this study is to carry out necessary research within limitations to arrive at estimates for segments under MEPSC remit to assist in decision making and goal setting.

In a situation of lack of reliable data for these segments our approach is to combine qualitative and quantitative assessments to arrive at areas of growth and criticality that allow us to focus our offerings and interventions based on that.

4. SCOPE

The scope of the Skills Gap Study is limited to the Private Sector and focused on the MEPSC remit as provided to us at the in terms of available sub-sector of:

- Office management
- Professional skills (including Security Sector)
- Training and assessment
- Entrepreneurship
- Education sector (Non-Teaching)

The study is also limited to formal sector and not the unorganised sector.

5. METHODOLOGY AND APPROACH

The methodology for the Study comprised both Primary and Secondary Research. The following methods were used:

PRIMARY RESEARCH

1) Email Surveys
2) Direct Surveys
3) In-person Interviews
4) Workshops

The selection of primary research target companies is based on a mix across sectors, geography and of various sizes of companies. This is to ensure that sufficient variation is represented and captured to remain relevant to context.

SECONDARY RESEARCH

This included review of reports and statistics of various aspects of labour market relevant to the remit of MEPSC. This included official statistics and reports, apart from privately commissioned reports by various stakeholders.

5.1. PRIMARY RESEARCH COVERAGE

The Primary Research has so far covered 76 companies across 7 cities as listed below including the conurbation of Delhi and the National Capital Region.

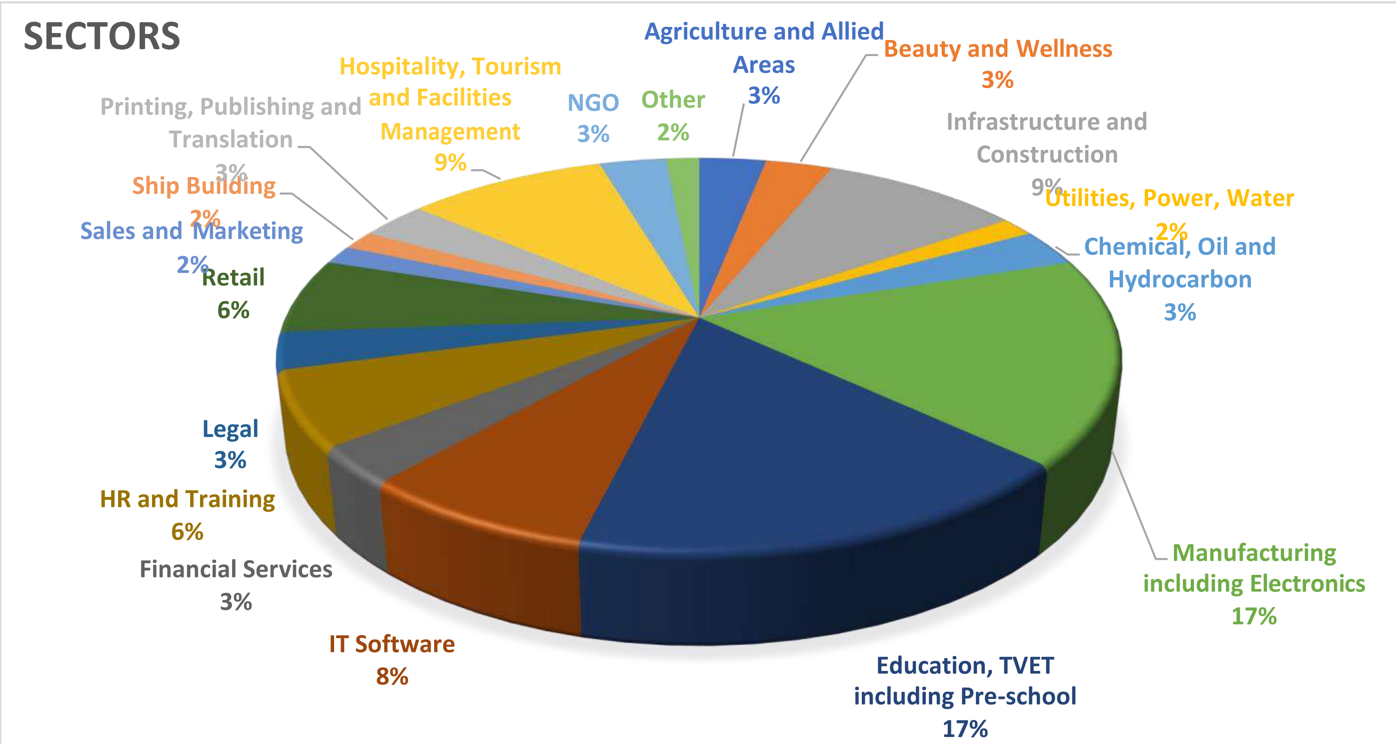
The companies visited are listed below.

S. No	Name of the Company
1	4 Tune Factory
2	AAA Business Solution India Pvt. Ltd.
3	ACC Sales
4	ACCPL Training Division
5	Accurate Group
6	ACE Designers
7	ACE Manufacturing Systems Ltd
8	Ajay Nursery
9	Apollo Medskills
10	Ascensive Educare
11	Auto CNC
12	Bapu Nature Cure Hospital and Yogashram
13	Betterplace
14	Bettter Casting
15	Big Bazaar
16	Brand Factory
17	Cambridge Colours
18	Caravan evolved craft Pvt.Ltd
19	Carnival Wellness Solutions Pvt. Ltd.
20	Chowgule & Co. Pvt. Ld.
21	Classic Protection Force Pvt. Ltd.
22	CNG Agriculture and Waste Management PVt. Ltd.
23	Cochin Legacy
24	Continental Devices India Limited

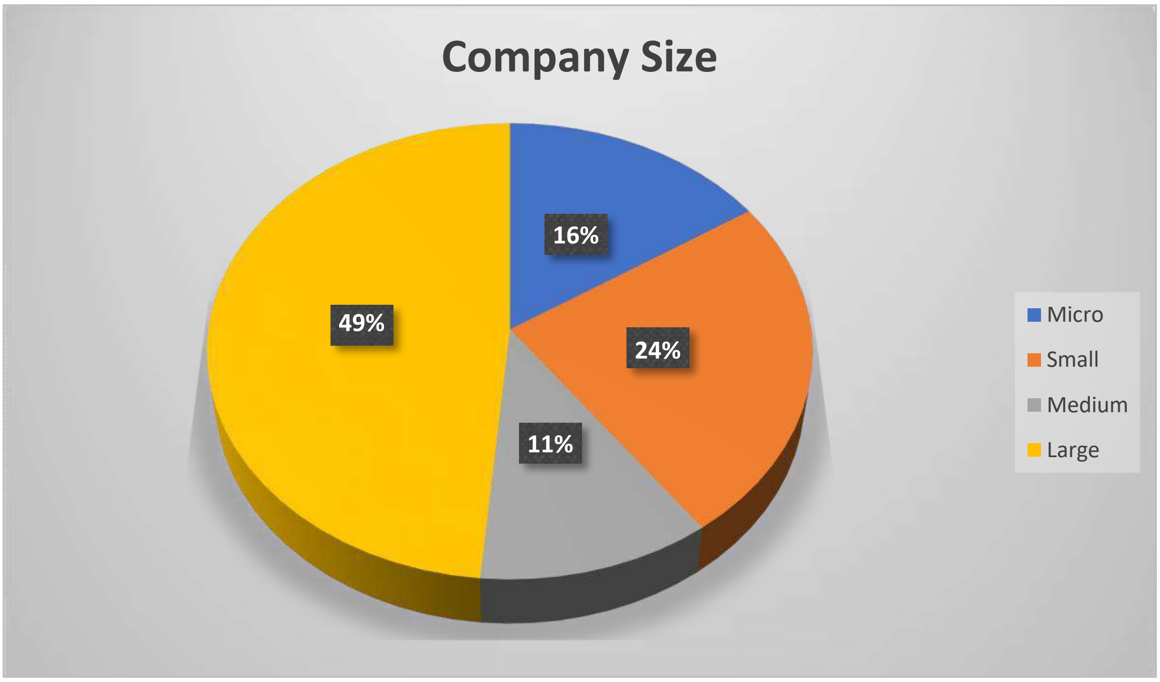
25	Country Club Hospitality and Hospitality
26	Dalmia Cement
27	DAV Institute of Management
28	Dhanush Engineering Services
29	Disha Communications Private Limited
30	DPS Public School, Ghaziabad Society
31	Duster Total Solutions Services Pvt Ltd.
32	Earth Water Group
33	Efftronics Substance Pvt. Ltd.
34	Eukti Innovative solutions
35	Excelus Learning Solutions
36	Hathway
37	HRD builders
38	iAcept Software
39	IBM
40	IIC
41	IIEFS
42	IRCON Enterprises
43	Labournet
44	Lex Lingua Analysis and Research Pvt. Ltd.
45	Lifestyle International Pvt. Ltd
46	Metro Cash and Carry
47	Micromatic Machine Tools Pvt Ltd
48	Mitr HR Solutions
49	Moraine Group
50	NIIT Yuva Jyoti
51	NSHM Business School
52	Oyster
53	PDM University
54	Pragati Offset
55	Preva Systems
56	Raveendra Hospitality Pvt. Ltd.
57	Sacred Heart College
58	Sacred Heart Higher Secondary School
59	Sarkar Nursery
60	Siesta Hospitality Services Ltd.

61	SIS India Limited
62	Skill Consultancy Services
63	SMEC Automation Pvt. Ltd.
64	SPAR Hyper Market
65	Srconi Labs
66	SRMB
67	Takemytravel.com
68	The KCP Ltd.
69	The West Coast Paper Mills Ltd.
70	Total Sourcing
71	Transfat India Pvt Ltd
72	Unitedworld School of Business
73	Uttaran ETC.
74	V Guard Industries Ltd.
75	Vizag Poly Packaging Industries
76	V-Konnect

5.2. SECTORWISE DISTRIBUTION OF COMPANIES



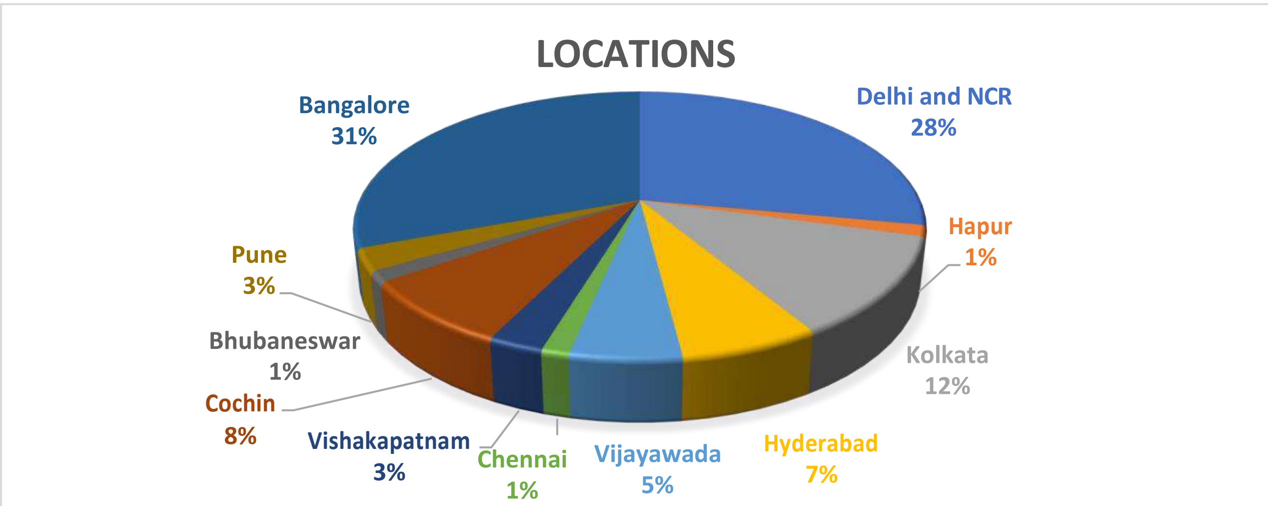
5.3. COMPANIES DISTRIBUTION BY SIZE



5.4. COMPANIES BY LOCATION

The following cities were covered under the Skills Gap and Demand Aggregation Study:

1) Delhi and NCR
2) Cochin
3) Hyderabad
4) Vishakapatnam
5) Vijayawada
6) Kolkata
7) Bhubaneshwar
8) Pune
9) Chennai
10) Bhubaneswar



6. OBSERVATIONS AND FINDINGS

The observations and findings presented in this interim report details areas that form the remit of MEPSC as defined by the term sheet and overall brief at the time of commissioning. While MEPSC remit may not qualify as a Sector in itself, we have used the term sector and sub-sectors in order to maintain consistency in the nomenclature for comparability with other SSCs and common or shared understanding.

The Primary data points while have indicated job roles and ranking in terms of volumes within these, the demand data is not sufficient to draw convincing conclusions yet to provide reliable estimates. We are working to ensure that by the end of the study, we will be in a position of greater clarity.

At this stage we are using this data to support secondary data and evaluate whether indications are in the right direction.

6.1. MACRO DATA

Given their remit the entire Indian workforce in one form or the other forms part of their remit. As per census 2011 we had a workforce of 472 Mn. Approximately 10-12 Mn people Net additions are there to the workforce per annum.

If we were to segment this we have about 49 Mn Organised Sector workforce, growing at a slightly increasing rate due to formalisation of the economy it is expected to be at 60 mn by 2030, means at this rate if it remains steady, we are looking at the following growth pattern.

Figures in Millions (Mn)	2018	2022	2024	2028
Total Workforce	515	537	548	570
Organised Sector	49-75	51-78	53-82	58-87

About 67% of the 17.87 lakh companies registered in India were active at the end of July 2018, as per data from the ministry of corporate affairs. There were more than 11.98 lakh active companies as of July-end. Active companies are those carrying out normal business activities and make their statutory filings to the stock exchanges on time.

In terms of economic activities, 3.74 lakh companies were into business services and 2.37 lakh entities were engaged in manufacturing and other lines of work. Business services include information technology (IT), research and development, law and consultancy.

As per NSSO surveys, the workforce in the country is at 474.1 Mn persons in 2011-12.

While 23.18 crore persons were employed in agriculture and allied sectors in 2011-12, 11.50 crore were employed in industries sector and 12.73 in the services sector.

At the end of financial year 2010-11, a total of 29 Mn workforce were employed in the organized sector which includes both public and private sector. While, public sector had 17.5 Mn employees and private sector had 11.5 Mn. It is observed that community, social and personal services industry had 39% of the total workforce employed. In manufacturing industry, private sector had employed almost 5 times that of public sector workforce.

While there are varying statistics on the growth in jobs in the formal sector, with estimates ranging from 7mn to 1.8 mn. Given the lack of granular data, we are basing our estimates on safety values to estimate need for manpower based in the sector and indications from primary research study carried out.

7. SCOPED FINDINGS

Given below are the more scoped findings based on areas within the sector that we find more relevant to decision making for MEPSC and related stakeholders. We have as mentioned earlier attempted to scope the study based on five segments:

1) Management
2) Management Support Functions (Staff Functions)
3) Education - Non-Teaching
4) Entrepreneurship
5) Professional and Employability Skills

Relevant information derived from secondary and primary studies are provided in this section.

7.1. MANAGEMENT

ORGANISATION MANAGEMENT

Organisation Management included Top management roles including

EXECUTIVE MANAGEMENT (BOARD) INCLUDING EXECUTIVE AND INDEPENDENT DIRECTORS

- Development activities and programmes for Directors, especially Independent Directors is being done through various channels that include:
  - Business Schools such as ISB, IIMs, etc.
  - Consulting Companies
  - Other L&D Organisations such as HPACS,
  - Industry Bodies such as ICSI, ICAI, Institute of Directors, AIDI – Association Of Independent Directors Of India, etc.
  - International Organisations
- Given the emphasis on Independent Directors in the regulatory framework and also the developments in the formalisation and formation of companies. This is a growing area, with significant scope of impact and positioning.

Summary Statistics of Indian Companies as on 31st March, 2017

Sl. No.	Description	No. of Companies
1.	Total Companies Registered	16,41,333
2.	Companies closed	3,01,778
3.	Dormant u/s 455 of Companies Act, 2013	802
4.	Inactive u/s 455 of Companies Act, 2013	1,38,206
5.	Companies under process for closure	30,962
6.	Active In-Progress (Inactive companies under 21-day window for completion of pending filing)	282
7.	Active Companies (1-2-3-4-5-6)	11,69,303

- With significant activities in the corporate space there will be a growing need for professional directors, who know how to operate under various conditions.
- This also is important as the business context is rapidly changing in terms of regulation, technologies and globalisation. Directors require specialised and customised input to stay ahead of the curve to make significantly important and critical decisions.
- Currently there are 12 Lakh Active Directors in India

C-SUITE INCLUDING CXOS

- Chief Executive Officer (CEO)
- Chief Operating Officer (COO)
- Chief Information Officer (CIO)

Registration of Companies Limited by Shares during Financial Year 2016-17

(₹ in Crore)

Sl. No.	Companies Limited by Shares	Government		Non-Government		Total	
		No. of Companies	Authorized Capital	No. of Companies	Authorized Capital	No. of Companies	Authorized Capital
1.	Private Limited	26	101.73	95,302	16,494.79	95,328	16,596.52
2	Private Limited	106	4,797.17	2,007	9,863.09	2,113	14,660.26
Total		**132**	**4,898.90**	**97,309**	**26,357.88**	**97,441**	**31,256.78**

- Chief Financial Officer (CFO)
- Chief Compliance Officer (CCO)
- Chief Human Resources Manager (CHRM)
- Chief Security Officer (CSO)
- Chief Green Officer (CGO)
- Chief Analytics Officer (CAO)
- Chief Medical Officer (CMO)
- Chief Data Officer (CDO)
- Others

- Development activities and programmes for CXOs is being done through various channels that include:
  - Business Schools such as ISB, IIMs, etc.
  - Consulting Companies
  - A large range of L&D Organisations
  - Industry Bodies
  - International Organisations
- Companies area actively seeking an engaging training options for these segments. There isn't a structured framework for learning and development for the CXO level staff. Whereas, this is a critical segment as their decisions and performance have significant impact on the organisation. Also, the risks and responsibility they carry warrants a need for a development support structure. The framework should also help them in self-evaluation, as a number of these senior level personnel are required to make their own decisions regarding their learning and development needs.
- Middle managers also are expected to develop skills for leadership and this is an area of great need for successful succession planning. One of the most significant complaints around organisational management is the lack of leadership skills in middle managers to take on these larger roles.

PROJECT MANAGEMENT

- Project Management is a significant aspect of Management and by some estimates, India will need approximately an additional 7 mn project management professionals in the country by 2027.
- By another estimate we will need approximately 4 Lakh PM professionals per annum.
- At present, there are 38,000 certified project managers with project management skills in the country.
- According to PMI, trained professional is earning 25-40 per cent higher than untrained professionals across the globe.
- Significant project management training is happening in the following courses that are popular
    - PRINCE2
    - LEAN Six Sigma
    - AGILE
    - MICROSOFT Project
    - PMP
- Certificate, Diploma and Post-graduate diploma courses are also available through business schools and colleges.
- Project Management courses are currently being offered and conducted by various institutions that include:
    - Business Schools such as ISB, IIMs, other Business Schools, etc.
    - Some Private and Public Colleges
    - a large range of L&D Organisations such as PMI, L&T Institute of Project Management, etc.
    - other International Organisations
- New Jobs expected in the project management space are expected to be just over 7 Lakhs.
- Project management is a significant area for India to not have their own standards and framework for this area seems a big gap in the qualification register.

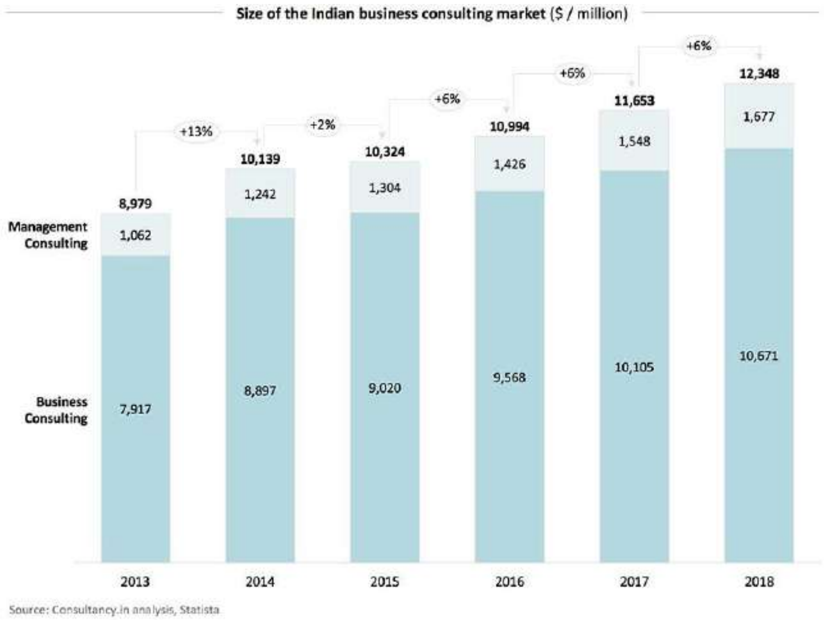
DISASTER MANAGEMENT

- Disaster Management is a significantly important area for India to develop capacities in.
- Given the change in climatic conditions and given the vast land mass that India has there is a need for significant amount of training and development in the area of Disaster Management
- National Disaster Management Authority and its state chapter currently have the mandate to lead capacity building efforts in Disaster prone areas. Given their capacities it will be a massive challenge for them to cover the entire country and its population.
- National Institute for Disaster Management - Under the Disaster Management Act 2005, NIDM has been assigned nodal responsibilities for human resource development, capacity building, training, research, documentation and policy advocacy in the field of disaster management.
- Formal courses for disaster management is being conducted through a few Institutions these include:
    - Indira Gandhi National Open University (New Delhi)
    - University of North Bengal (Darjeeling)
    - International Centre of Madras University (University of Madras)
    - Mahatma Gandhi University (Kottayam)
    - Disaster Management Institute (Bhopal)
    - Centre for Disaster Management (Maharashtra)
    - The National Civil Defence College (Nagpur) and
    - National Institute Of Disaster Management (Delhi).
- Some of the courses offered include:
    - Emergency planning procedures
    - Hazards, risks and disasters
    - Technological development, environmental and sustainable development

- Law and management fundamentals
    - Political, international and social issues
    - Roles of key agencies
    - Relief co-ordination and planning
    - Field skills
    - Disaster theory, statistics and logistics
    - Disaster mitigation, preparedness and response
    - Earth catastrophes, fire and explosion
    - Physical, psychological and social reconstruction of disaster-affected communities
- It will be beneficial to engage with NIDM and partner them to develop standards for formalising job roles in the sector and conducting training for jobs and community/voluntary capability development for Disaster Management.
- We have not pursued this area yet owing to pending discussions with MEPSC board of interest in this area.

MANAGEMENT CONSULTING

- Management consulting is a growing field and over the past few years has emerged to be a big employer in India and across the globe.
- Consulting as an Industry has consistently grown over the past decade or so.



- By some estimate is it 18.2% and the above graph shows a more conservative 6%.
- Of the $11.5 billion market, $1.5 billion (approximately 13%, Rs. 9,600 Crore) is contributed by the management consulting segment, which includes the strategic functions of the market ('strategy consulting,') as well as a number of other organisational advisory functions. The management segment has also registered consistent growth over the last few years, projected to reach around the $1.7 billion (Rs. 10,900 Crore) mark by next year.
- Most of the consultants are hired through business school and from other industries as domain specialists. The total number of consulting companies in India are over 12000 and growing.

POLICY, GOVERNANCE AND RISK

- Policy, Governance and Risk is a significant area that involves various roles including
    - Company Secretaries
    - MIS and Data Analytics Personnel
    - Compliance and Ethics Officers
    - Internal Auditors
    - Risk Management Personnel
- Risk Management has some roles which are emerging, these include
    - Enterprise Risk and Regulations Manager
    - Risk Management Consultant
    - Risk Analyst
    - Risk Manager
    - Chief Risk Officer
- Internationally this are has yielded certifications such as Certified Fraud Examiner (CFE), Certified Risk Analyst (CRA), Certification in Risk Management Assurance (CRMA), Financial Risk Manager (FRM), Professional Risk Manager (PRM) and/or Certified in Risk and Information Systems Control (CRISC).
- Training and capacity building in these areas in India are done by
    - Consulting and Auditing Companies
    - Industry Associations
    - ICAI, ICSI, etc.
    - Regulatory bodies
    - Colleges such as West Bengal National university of Juridical Sciences,
    - Other Institutes and Training Providers Indian Institute of Corporate Affairs, PMI, etc.
- Some of the courses available are:
    - Diploma in Risk Management by Sharda University
    - Certificate courses by The George Telegraph Training Institute, Kolkata
    - Post-Graduate Diploma by The Institute of Insurance and Risk Management (IIRM), Hyderabad (Focused on Insurance)
    - Certified Risk Professional Training Course, based on ISO 31000 offered by partner organisations
    - PMI-RMP offered by PMI and delivered by partner organisations
- The demand for Risk Managers is growing and expected to take off in the near future. Large companies have three to four people as risk managers, companies with greater risk exposure can have upto 13-15 Risk Managers. Each of the top consulting companies have over 1500 Risk professionals for project and advisory services apart for their own organisation risk management.
- Risk Management is a growing field and now even MBA specialisations are beginning to be offered in the Risk Management.

FUNCTIONAL MANAGEMENT

Functional management derives its name from the managers in various line functions in the organisations. These are divided into Line and Staff Functions. The Line functions apart from Sales and Customer Service are assumed to be within the remit of respective Sector Skills Councils. The Staff functions, along with sales and customer service are covered within the next section.

ROLES

The roles identified in the Management Segment are identified as below.

Level 10	Chief Executive Officer					
Level 9	Chief Operating Officer	Chief Finance Officer	Chief Information Officer	Chief Sales Officer	Chief Marketing Officer	Chief Learning/ Knowledge Officer
	Chief Technology Officer	Chief Strategy Officer	Chief Security Officer	Chief Compliance Officer	Chief Risk Officer	Chief Information Security Officer
Level 8	Transformation Agent	Treasurer	Enterprise Risk and Regulations Manager			
Level 7	Strategic Planner	Business / Management Consultant	Risk Manager	Risk Analyst	Risk Management Consultant	
Level 6	Project Manager	Manager, policy development	Manager, budgeting	Competitive Intelligence Analyst	Risk Manager	Project Management Specialist
Level 5	Project Co-ordinator	Business Analyst	Specialist, business efficiency			
Level 4	Management Trainee					

7.2. MANAGEMENT SUPPORT AND STAFF FUNCTIONS

HUMAN RESOURCES

- The human resources services market is estimated to be more than INR 35,000 Crores
- This is growing at the rate of 10-12%
- The key segments in this are provided below:

- Indian Staffing Industry is the major segment within these services.
- The Staffing Industry includes companies which list employment vacancies, place applicants in employment, supply temporary workforce and all other employment related services. Market size of the Indian staffing industry was INR 26,650 crore in 2014 and is growing between 10-15% year on year.
- The industry is broadly classified as:
    - Temporary/Flexi Staffing: Firms which retain workers and supply temporary workforce to other companies for specific assignments. This is the largest segment with a market size of INR 19,900 crores which is 75% of the market. This is primarily because of pass through salary costs included in the revenue of such firms.
    - Permanent recruitment: Sourcing, screening, and on-boarding of candidates from junior level to positions to CXO-level positions (CXO level hiring is called Search). The industry forms about 12% market with a size of INR 3,250 crores. It includes only the net fees from each successful referral/hire.
    - Other Employment Services: Market size of other employment services is at INR 3,500 crores which is 13% of the overall market. Other categories primarily include:
        - Payroll administration
        - Recruitment process outsourcing
        - HR management and consulting
        - Employment training
        - Online job portals
- It is estimated that approximately 60000-80000 Students pass out with HR specialisations in the country each year.

Key Roles in this sector include:

Level 8	Head - HR & Admin								
Level 7	HR Consultant	Organizational Psychologist	Development Coach	L&D Consultant	Head - Talent Acquisition	Organisational Development Consultant	Professional Counsellor		
Level 6	Manager - Contract Labour	Industrial Relations Manager	Contractor - labour	Specialist - Compensation and Benefits structure	Manager - Compensation and Benefits operations	Manager Statutory and Compliance	Manager - Payroll, Transactions and data management	Manager - HR	Manager - HR and Admin
	Manager- Recruitments	Specialist Performance Management Systems	Talent Development Manager	Talent Acquisition Specialists (Business Alignment)	Learning Manager/ Administrator				
Level 5	Labour Relations Specialist	Compensation and Benefits Analyst	Executive Statutory and Compliance	Supervisor - Background Verification	Asst Manager - HR Projects (Improvement /Innovation)	Multi-Functional HR executive	Executive Performance Management	Job Analyst / Occupational Analyst	Head-Hunter
Level 4	Executive - Employee Welfare & IR	HR Executive - Payroll and Employee Data Management	HR Executive - MIS	Background Verification Executive(Field)	Background Verification Executive (Online and Deskwork)	Recruitment Executive - HR	HR Assistant - Payroll operations & Employee Data Management		
Level 3	Attendance and Rostering Assistant								

ADMINISTRATION, OPERATIONS AND OFFICE MANAGEMENT

- Office Administration, Operations and Management roles are also prevalent in every organisation.
- There are barely any formal educational programmes that are aimed at this staff except short duration vocational programmes that are offered by a few ITIs, and private training providers.
- There is a demand for improved skills development for administration, operations and office management staff, both in the manufacturing and services sector.
- Skills required in these roles range from entry or junior staff to Supervisors and Managers
- At Junior levels email etiquette, personal presentation and grooming, communication skills, business writing, adaptability, etc. are seen as the skills needs. Whereas, at higher levels it is of supervisory skills, team management, scheduling and planning, safety and security orientation, incident handling, using technology, etc.
- The need for skilled manpower in these segments is substantial, and the turnover is substantially high. Attrition rate can be as high as over 50%.
- It is also important to develop formalised career paths in this segment, with a mechanism for ongoing skills development. This requires a flexible training delivery framework to be established as most of these workers are not provided time-off work for their personal development for extended periods of time.
- Roles identified in this segment include:

Level 7	Head - Administration Services								
Level 6	Manager - Facilities and Infrastructure	Manager HR & Admin	Executive Assistant	Manager Travel and Accommodation operations	Manager - Vendor Management				
Level 5	Personal Secretary	Office up-keep Supervisor	Daily staff transportation Supervisor	Procurement Executive	Multi-Functional Admin Executive	Admin In-charge - New facilities and Infrastructure	Supervisor - Record keeping and Documentation	Travel Desk In-charge - Domestic and International	Vendor Management Executive
Level 4	Secretary	Office Operations Executive	Receptionist	Daily staff transportation co-ordinator	Office Housekeeping Executive	Field Executive-Document and data collection	Office Travel Co-ordinator - Domestic and International		
Level 3	Office Assistant - Facilities	Office Pantry Attendant	Operations Assistant	Office Assistant - Stationery and supplies (MES)	Office Housekeeping Assistant/ Cleaner				
Level 2	Office attendant	Labourer, odd-job	Hand Delivery Person	Dish Washer / cleaner					

SALES AND BUSINESS DEVELOPMENT

- Sales and Business development is one of the fastest growing job roles across the Indian market.
- India has 1.5 million people working in sales. Out of which 62% are based in Delhi-NCR, Mumbai, and Bengaluru.
- There is a critical deficiency of sales skills in the country and industry is seeking credible sales training options all the time.
- A recent report by TeamLease- India's Job Market Salvation: Sales stated that the sales domain has a potential to create 2.5 million jobs by 2021. The study indicated that about 2.5 million jobs without any structural reforms, and 10 million jobs with structural changes, will be created by 2021.
- The FMCG/FMCD sector alone has the potential to create 30% of the 2.5 million jobs while organized retail overall has the potential to create 50% of these jobs. The report pegs sales skill deficiency in organized retail and tourism at 65% and, in travel and hospitality at 35%
- Growth and investment, capacity creation along with expansion and innovation are the significant drivers of sales jobs in FMCG, FMCD, retail, and e-commerce
- According to analysis, owing to rapid industry transformation, market expansion, customer evolution, reach and revenue growth the business models are evolving and so is the sales function across sectors. By 2025 India is set to become the fifth largest consumer durables market in the world and it will have a corresponding impact on sales profile. With FDI inflow of 77K crore between April 2000 and March 2017 the incremental sales job creation resulting from FDI inflow is estimated at around 200k in the next 3 years. Similarly, the retail and ecommerce sector will see an incremental sales job creation of 350K in the next 3 years.
- Some of the key profiles that will see a huge demand in FMCG are sales representatives, Business Development Officer, Sales Coordinator, Territory Sales In-charge and sales officer.
- It will contribute to 71.7K incremental job creation. However, in FMCD 60.6K incremental jobs will be contributed by profiles like Cluster manager, Trade sales manager, Inside Sales, Sales trainers and Category Managers. Retail sector will see an incremental job creation of 69K in profiles like Store Manager, Channel sales specialists, Relationship Manager, Sales Executive and Promoter.
- Apart from traditional sectors new age business driven by the governmental thrust on digital India is also going to add a hundred thousand jobs. The adoption of mobile banking and e-payments will add new profiles such as merchant acquirers. In fact, the profile alone will create around 122K jobs in the next 3 years.
- "The e-commerce and technology sector, contrary to popular opinion, will be responsible for the creation of maximum jobs in sales domain. Since these sectors have moved towards unified interface across online and offline, they will now need offline sales people to augment some of the digital sales processes. This will be seen in the physical stores of most online brands right from furniture retailing to grocery stores. The ecommerce companies will need sales force to augment selling at these stores. Also, in payments and financial services the merchant acquirers will have a large need of people who will be required not just for tracking brands but also to synchronize an understanding and making sure the brands understand their products and ways in which they can be engaged." - Mr. Mrinal Sinha, COO, Mobikwik Systems
- Some qualifications for Sales workforce have been developed under various sector skills council, that cater to Retail and specific Industries. In principle with MEPSC remit and the drive to reduce the duplication of qualifications, especially narrowly defined qualifications, there is a strong case for developing combined generic Sales and Business Development qualifications that may further provide options for sectorial specialisations and options. This will not only streamline the qualification, but also make them more suited for deployment in the current market where most Sales and Business Development qualifications are delivered keeping options for qualification takers open, by providing generic skills to the candidates first. This will truly open out the acceptance of these qualifications by

training providers, thereby building a value proposition in the system that can be backed by volumes in delivery.

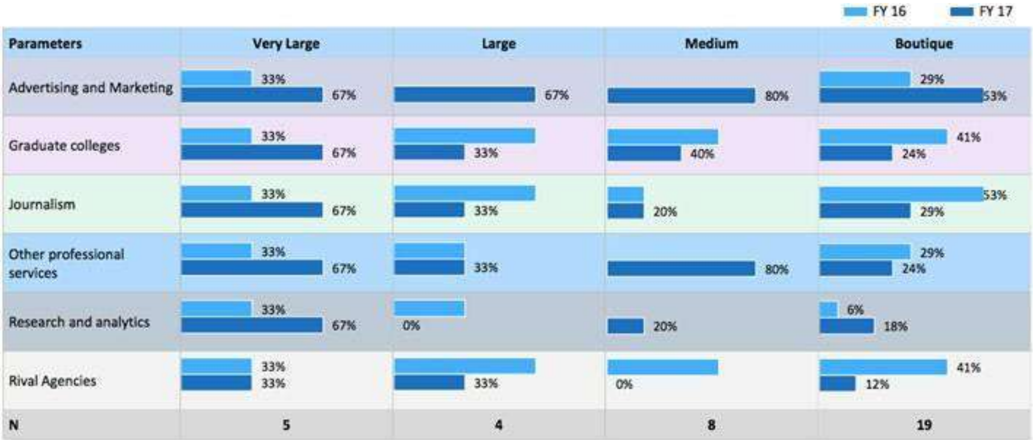
- The generic roles uncovered for Sales and Business Development are provided here.

Level 7	Sales Head	Sales Consultant				
Level 6	Sales Manager - (Multi Channel)	Sales Call Centre Manager				
Level 5	Sales Officer - Exports	Team Leader - Tele Sales	eCommerce Operations In-charge	Sales Analyst	Independent Sales Agent	Relationship/Key Account Manager
	Sales Manager - B2B	Sales Manager - B2C	Distribution Sales Manager	Sales Manager - Agency		
Level 4	Sales Co-ordinator	Sales Representative B2B	Sales Representative B2C	Tele - Sales Executive - Pre-Sales, Sales and Post Sales	Wholesaler	Door -to -door salesman

MARKETING, CORPORATE AND MARKETING COMMUNICATIONS, AND PR

- Marketing and Marketing Communications is an ever growing area, in the country. Media Communications though is falling within the purview of Media and Entertainment Skills Council, there is still an opportunity to focus on other Marketing Segments.
- With growth in the Digital Marketing space outstripping all other marketing segments, chances are there will continue to be overlapping areas with the media and entertainment space, with even SSC NASSCOM overlapping to some degree.
- Online advertising market in India is increasing by 30% year on year. With the expected share of advertisement allocate to digital media is around Rs 25,200 crores by the year 2020.
- With government push for programmes such as Digital India and Start-up India there will be a greater push towards skills development in the field of Digital marketing.
- The public relations (PR) industry grew 18% to touch Rs1,315 crore in FY2017, according to a report titled 'State of the Industry Survey 2017' by the Public Relations Consultants Association of India (PRCAI).
- Digital, social media and content-driven campaigns contributed as much as 29% to the revenue of PR firms.
- A survey, conducted among 36 public relation companies and 28 corporate communication teams of various companies in India, between July and August this year by Feedback Business Consulting, shows that the industry is expected to continue to register double-digit growth, reaching Rs2, 000 crore by 2020.
- In terms of revenue share, media relations was the biggest source of revenue for PR consultancies, generating nearly 49 % of the total revenue.
- Meanwhile, digital and social media continues to contribute significantly (12%) to the revenue of the industry. Other services that are doing well include influencer marketing, designing strategies for companies looking to enter the India market, creative design and website development.
- Many youngsters get into these professions without undergoing a formal training. One has also seen lateral entry in to public relations from administration, engineering and similar disciplines, especially in public sector organizations.
- There are two major professional PR association In India viz., The Public Relations society of India (PRSI) and Public Relations Consultants association of India (PCRAI). In early 1980's the public sector organization set yet another PR association by the name Public sector PR Forum (PSPRF) but became dysfunctional after a few years. Efforts are underway to revive it.
- PRSI is recognized as the national PR organization by the International Public Relations Association, and is one of the founder members of the Global Alliance of Public Relations and Communications Management.
- Various regional Chapters of PRSI regularly organize seminars, lectures and discussions on various facets of public relations. The national chapter organizes a seminar every year on a topical issue that attracts a large congregation of PR practitioners. The national chapter has established outreach with academia and provided in the past forum to students of mass communication to congregate and understand the various trends in PR and its nuances.
- Public Relations Consultants Association of India (PCRAI) a trade organization represents public relations consultancy firms in India. formed in 2001, its mission is to "consistently establish benchmarking standards, knowledge, ethics and expertise and to encourage and promote the progression of Public relations Industry in India, while endorsing the effectiveness of professional and ethical services". PCRAI is affiliated with International Consultancy Communication Organization (ICCO) which is an international association for all national communication consultancy organizations headquartered in UK.

- Public Relations Society of India (PRSI) has been advocating with the concerned ministry to consider accreditation for the profession, but without much success until now.
- The availability of talent remains a key issue with stakeholders, especially in digital areas. Talent is also being hired from outside PR to drive content:
- Hiring of talent pool in FY 16-FY17



- Due to the growth of content driven campaigns and use of digital and social media, very large, large and medium firms have started to hire from advertising and media industry.
- There are over 80 public relations colleges/institute in India. Some of the best institutes for studying PR include Xavier Institute of Mass Communication, Mumbai; Symbiosis School, Pune; and Indian Institute of Mass Communication, New Delhi, The Delhi School of Communication, etc.
- The roles identified in this segment are as follows:

Level 8	Director - Sales and Marketing						
Level 7	Head - Marketing	Creative Director					
Level 6	Digital Marketing/Social Media Manager	Marketing Manager	Digital Marketing Strategist	Brand Manager	Art Director	Manager, Advertising and Promotion	Manager /Account planner Communications
Level 5	Marketing Specialist	Market Research Analyst	Marketing Materials Designer and Developer	Digital Marketing / Social Media Marketing Analyst	eCommerce Marketing Manager	TV Advertisement Designer	Media Relations Manager
	Copywriter	Digital Advertisement Designer	Content Production - Advertisement	Print Advertisement Designer	Media Planner	Media Buyer	Communications Analyst and Planner
Level 4	Marketing Executive	Survey and Market Research Interviewers	Marketing Content Writer	Digital Marketing/Social Media Executive	SEO Executive		
	Advertising Operations Co-Ordinator (Digital)	Client Account Executive - advertising	Advertising Operations Co-Ordinator (Digital)	eCommerce Marketing Co-ordinator	SMS/Email Marketer		
Level 3	Marketing Support Executive						
Level 2	Leaflets Deliverer cum Bill Sticker						

SECURITY

- Private Security has key business segments, such as manned guarding and cash services as well as allied services such as electronic security services.
- Manned guarding is the largest segment in the security services industry and pertains to provision of manpower to secure premises and individuals. Relevant activities within manned guarding include surveillance and protection of industrial, commercial and infrastructure facilities goods and people (both static and mobile), security checks, crowd management (e.g., event security) and close protection.
- Cash services is a relatively small but rapidly growing opportunity. It relates to provision of secured logistics for cash and other valuables from banks and other corporate entities. While there are specialized cash services players, given the synergistic nature of the services, it is also an extension of manned guarding operations of a number of private security services players.
- While electronic security services is a substantial opportunity (albeit significantly smaller than manned guarding), it is primarily dominated by large international OEMs and building solutions provider. Security service companies typically provide electronic security services as an add-on service to their existing customers, and are involved in installation, monitoring and maintenance.
- Private security in India is the 2nd largest sector, after agriculture, in terms of employment, with close to 9 million employees.
- Traditionally, it has been an unorganised sector with only around 40% of the market share with the organised players. However, the industry is progressing towards being organised as the consumer demand for security is gradually evolving from a mere guard to a professional and skilled guard, trained for movement of men and material, fire incidents, medical exigencies etc.
- Further, technology is progressively playing an ever-increasing role in the value added services being offered by the industry that include artificial intelligence, internet of things, hi-tech surveillance systems, biometric technologies, remote sensors, cyber security etc.
- The private security industry is amongst the largest employers in India, employing almost 8.9 million people, with the potential to employ 3.1 million more by 2022. The PSI also has a unique distinction of being the largest corporate tax contributor to the national exchequer.
- As per a study by The Guardian, the global market in the year 2017 was USD 180 billion and is expected to be worth USD 240 billion by 2020. In contrast, the Indian private security industry (PSI) is expected to grow faster at about 20% CAGR owing to the changing landscape of the sector in India. However, there remains a shortfall of manpower of about 30% with a potential to generate a number of jobs for the rural and urban poor.
- Workforce size of PSI is more than the combined strength of the Army, Navy, Air force and Police put together. With 8.9 million security guards and 1.9 million police officers, India has 5 times as many private security guards than police officers. The sanctioned strength of police personnel (civil and armed) in 2016 was just 2,464,484, which the employment in the PSI far exceeds.

INDUSTRY STRUCTURE

- The Private security industry can be broadly divided into 2 major segments – security services and allied services.

SECURITY SERVICE INDUSTRY

- A major part of the security services industry is the manned guarding followed by cash and electronic security. Manned guarding accounts for nearly 75% of the industry followed by cash services management and electronic security services having nearly 20-25% share.
- Manned guarding: A major part of the security services industry is the manned guarding where they have the highest employment rate and the highest revenue share in the PSI. Key users of manned

guarding services are IT/ ITES, retail, commercial, and manufacturing wherein 41% of the manned guarding services are utilised in the commercial sector and 39% in the residential sector. Further, 70% of the residential sector demands is coming from major cities like New Delhi, Chennai, Bangalore, Pune, Chandigarh, Lucknow, Ahmedabad and Jaipur.

- Cash management services: This is predominantly organised, with 7-8 players controlling 75-80% of the market share owing to high level of security concerns associated with operations in this area. The market is not yet mature as there are issues related to licensing of arms, and transfer of liability and insurance, which are making this segment a high risk and low return business. However, there has been an increase in demand for cash management services in view of expanding bank branch network, increase in number and spread of ATMs across the country, and growing use of debit cards.
- The cash management services offered by PSI are: Cash replenishment services for ATM network of banks. Movement of cash and high value items within bank's branch network. Cash pick-up and delivery for large corporate houses, retail outlets etc.

ALLIED SERVICES

- The Allied services aid the segments in provision of security services. It consists of Event Security Management and Security Guard Training.
- Event security management: Event security service providers employ unique command and control methodology enabling the client to focus on their event without worrying about security. Major activities under event security management are crowd control and VIP protection services. These services aid in security and emergency management planning also.
- Security guard training services: The introduction of the Private Security Agencies (Regulation) Act, 2005 has led private security agencies to adopt in-house training practices which are certified under PSARA by respective states. States have authorised the opening of training institutes recognised by them under PSARA. Sector skill council which is the authority on NOS/ QPs related to the subject, also has a number of training partners (TPs), who undertake the training; however, the trainees need to be certified by a PSARA certified training agency to be employed as a security guard. The training sector, due to PSARA not recognizing the training conducted by private TPs affiliated to sector skill council, is unorganised and fragmented.

INDUSTRY SIZE & EMPLOYMENT POTENTIAL

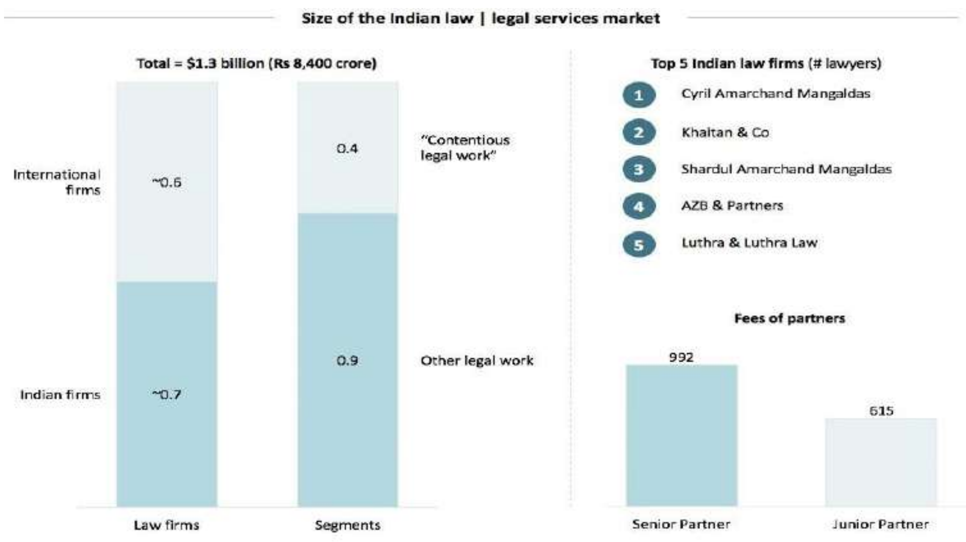
- Globally, and in India, manned guarding forms a major part of the private security service industry, constituting almost 75% of the private security services industry
- The 8.9 million private security guards and supervisors are employed in more than 22,000 private security agencies (PSAs) in India, mostly managed and run by ex-servicemen as their resettlement projects.
- Workforce is largely sourced from northern, central and eastern parts of India, with states like Bihar, Uttar Pradesh, Madhya Pradesh, Rajasthan and Assam contributing the maximum. Regions with significant population of ex-servicemen, paramilitary personnel and unemployed youth are biggest contributors.
- Security guards constitute 90% of the private security industry workforce. They form the base of the pyramid with little or no relevant experience. The private security services industry is mainly unorganised and only 10% workforce is employed in the organised sector. With the anticipated growth potential of industry, the employment potential is evident. Further, considering that majority of the workforce is being employed in the unorganised sector, skilling potential is also evident.
- The gaps in the skilling proficiency required by the industry/ clients and the training requirements as identified under PSARA are evident, and these need to be addressed to make the sector more viable and regulated.

- Despite 25% growth in the sector and the massive requirement of manpower, the industry reels under ambiguity of admissible training certificates as well as requirement of different categories of trained manpower.
- There is an incremental human resource requirement of 3.1 million for the period 2017-2022.
- Roles identified in this segment are:

Level 8	Manager - Fire Services				
Level 7	Deputy Manager - Fire Services				
Level 6	Security Officer	Assignment Manager	Fire Supervisor		
Level 5	Security Supervisor	Personal Security Officer	CCTV Supervisor	Fire Fighter	Chief Investigator
Level 4	Unarmed Security Guard	Armed Security Guard	Investigator	Field Verification Executive(Field Executive)	

LEGAL

- There are various requirements in the Legal Sector for skilled manpower. There are over 1400 law colleges and educational institutions in the country.
- The legal market is not only growing at a rapid rate it is becoming more professional and therefore requiring a higher standard of professional skills.



Source: Consultancy.in analysis, RSG Consulting

- It is estimated that there are over practicing 8,00,000 lawyers in India. Each lawyer has a team supporting it.
- The Legal Sector has clear requirements for the under-developed, but growing area of need for professionally trained and certified manpower in the Legal Assistance and Para-Legal Assistance space. These personnel support the management of Law Offices, Courts and Arbitral/Mediation Institutions.
- With significant growth in legal cases and evolving segments such as arbitration there is a greater need for professional assistance in this space.
- There is also a great deal of need for Language translation, editing, drafting and paraphrasing, etc. for the Legal Processing Outsourcing segment.
- The following skills are found deficient in the Legal Assistance space:
  - Legal drafting -Including Court and Arbitration Pleadings Report Writing, Daily case communication
  - Contract Drafting -Standard Clauses, Special Clauses and Boilerplate Clauses.
  - Drafting an effective Arbitration Clause and /or Dispute Resolution -Jurisdiction, Seat, Venue, Language, Cost and Time Limit.
  - Basics of Contract and Administrative Law.
  - Methods of Minimizing Cost and making Efficient and Speedier Dispute Resolution Procedures
  - Mediation
  - Hands on skill in Mediation and Dispute Resolution.
- For para-legal the following skills are found to be deficient:
  - Court-Clerks and Case Managers / Counsels Administrators in Law Offices and ADR Institutes.
  - Conduct research on Laws, Regulations and Legal Articles. Assist Lawyers by writing Due Diligence Reports and prepare for Court and Arbitration Trial Notes.
  - Drafting formal Statements and Affidavits to be used in Court or Arbitration.
  - Drafting Day to Day client correspondence
  - Use of Cloud Technology -Store information related to Case in Computer databases / documentation and precedent storage by use of Cloud Technology.

    - Live Transcription Technology for recording evidence -(in the light of the recent Supreme Court Order)
- In addition since the business language of the courts till district courts is held in the local language and from the high court level the language transitions to English, there is a great need for language skills in the Legal sector for practicing professionals for professional development and career growth, this aspect needs to be addressed by developing a mechanism for providing learning support to practicing legal professionals.
- The Legal Process Outsourcing sector is growing rapidly in India and is another place where there is need for skilled manpower with specialised skills.
- The career path for a legal professional in the LPO framework may be in one of two directions: either specialising in a single practice, such as intellectual property, or working across different areas, like intellectual property, contracts, research and transcription, etc.
- LPOs are constantly recruiting highly educated and capable legal professionals to work on not just back-end documentation but also on higher-order tasks such as contract management, drafting, and review; due diligence for M&As; patent support for intellectual property, etc.
- The growth in LPOs is due to the larger market forces that are driving enterprise legal functions to transform into leaner organisations. In-house counsels are no longer free from the cost cutting and streamlining imposed on all other support functions. As a result, enterprise legal functions are looking for ways to reduce costs. These methods include erecting captive centres in low cost areas, pressuring major law firms to reduce fees and use offshore resources, and engaging offshore LPO providers directly to outsource their legal needs.
- Indian LPOs, with their well-qualified, quality workforce of affordable English-speaking lawyers and graduates, some of whom are UK and/or US educated, and a national legal system that is uniform to the systems of the US, UK, Canada and various other European countries, are turning out to be the preferred outsourcing destinations for global companies.
- Initially, LPOs offered only basic e-discovery services to their clients, but, after the economic crisis of 2008, LPOs started offering more complex and sophisticated services, such as legal research, contract management, review and compliance, intellectual property, patents, etc, in addition to document review. Although a part of the broader industry of business process outsourcing (BPO), the LPO sector is considered niche and relies heavily on domain knowledge and expertise, making skilled professionals indispensable and the industry’s most important asset.
- As a result of all of these factors, Indian lawyers, paralegals and law graduates are increasingly seeking a career path in LPOs, a path that will provide them with an opportunity to hone their managerial skills and enjoy a corporate lifestyle. LPOs are not only providing scope for fresh law graduates to begin their careers but also enabling lawyers in their mid-careers to gain corporate and executive experience. In an industry which heavily relies on domain knowledge and expertise, the demand for hiring highly educated professionals has gone up, not just from the legal fraternity, but also from the engineering and management fields.
- With an increasing number of global companies, turning to India for outsourcing legal work, the demand for domain experts and skilled personnel will rise even further, positioning India as a key recruiter of LPO talent.
- It is estimated that over 2 Lakh personnel are engaged in the LPO space in India with an average growth of 30-40% p.a. It is expected that for the next few years there will be an addition of almost 60000 people every year for the next few years.

- The following roles were identified as part of the Legal Roles Mapping Exerc se

Level 9	Sr. Partner - Law Firm								
Level 8	Junior Partner								
Level 7	Company Secretary - Corporate Affairs / Legal Consultant								
Level 6	Associate - Law Firm	Compliance Manager	Quality Assurance Manager						
Level 5	Senior Legal Associate	Editor - Legal Content	Senior Legal Associate	Paralegal Specialist - Domain specific	Analyst IP Legal Services	Process Auditor / Compliance executive	Product Quality Auditor	Service Quality Auditor	Quality Assurance Analyst
Level 4	Paralegal - Contracts, agreements, letters of intent, etc	Paralegal Associate - Patents, Trademark and IPR	Paralegal Associate - Patents, Trademark and IPR	Legal Associate - Banking and Finance	Legal Associate - Healthcare	Legal Associate - Healthcare	Legal Associate - Cyber Security		
	Legal Associate - Legal Research	Legal Associate - Banking and Finance	Proof reader	Paralegal - Contracts, agreements, letters of intent, etc	Paralegal Associate - Patents, Trademark and IPR	Docketing Assistant	Quality Assurance Executive		
Level 3	Legal data entry operator								

RESEARCH

- Research covered under MEPSC can include both Market Research and Research Methodology Skills for Academic and Applied Research.
- Market research jobs can be broadly divided into 2 parts:
    - Client side MR job (Demand side): Mostly these recruits are from top colleges (interns) and has the highest pay.
    - Research company / agency jobs (Supply side): This has 3 sub-parts.
        - **Research Design team:** This is the best roles which require primarily management degrees. Research team interacts with client side and designs questionnaire, runs the study and provides clients with reports/insights from the study.
        - **Field/Data Collection team:** This team gathers data/information from market by speaking with respondents and gathering data in the form of questionnaire / FGD summaries including both quantitative and qualitative data, though more of the former than the latter.
        - **Research Analyst team:** People passionate about numbers, working with huge volumes of data. Ideally good for statistically oriented personnel and IT savvy personnel, who understand a bit of coding and some amount of data manipulation/science.
- There are MR jobs both on the client side and the agency side.
- International MR agencies like Nielsen, TNS, IPSOS, GFK, IMRB, etc. and mid-sized domestically grown MR agency like MDRA, Market-Xcel, Market Pulse, etc. form the employment landscape that is sought after by candidates.
- Now, with Analytics and Big Data the career opportunities with sheer Data Analytics companies such as Fractal Analytics, Mu Sigma, etc. is enormous and can help in getting jobs with e-commerce companies as for career progression.
- Normally, MR companies recruit researchers from B-Schools or hire statisticians, psychologists, economists, econometricians etc. from different campuses or through lateral hiring.
- Job opportunities for other support functions such as field operations (data collection), tele-calling executives (CATI services), etc. is also a growing segment. With modern data collection tools such as mobile/ tablet devices, sensors, etc. the need for training and opportunities for those hands-on with modern technologies is also growing, with increased remuneration scales. The processes have become almost real-time, much faster and reliability on data have increased.
- The sector is growing at a rate of 6-7% per annum. But with increase in need for data and information this is expected to change and the rate of growth expected in the future is higher.
- Marketing Research courses are offered by the different business management schools in India, the examinations related to this field are the same as the ones, which are generally conducted for admission to the various management courses, names of some of which are mentioned below:
    - B.B.A. or Bachelor of Business Administration
    - M.B.A. or Master of Business Administration
    - M.M.R. or Master of Marketing Research
- The Marketing Research Association offers the Professional Researcher Certification (PRC) for market research analysts.
- Typical roles and designations in MR companies include
    - Research Associate, Research Analyst, Senior Research Analyst, Team Lead / Lead Analyst, Assistant Manager, Associate Manager, Research Manager, Senior Research Manager, Associate Director, Director, AVP, VP, Sr. VP, Junior Partner, Partner etc.
- The designations though do not translate into different roles, when rationalised based on scope of work and actual differentiation of competencies the following roles emerged as unique roles.

Level 9	Scholar	Scientist	
Level 8	Senior Research Fellow	Junior Scholar	Junior Scientist
Level 7	Research Fellow	Demographer	Statistician
Level 6	Researcher		
Level 5	Research Tools Developer	Research Analyst	
Level 4	Online research Executive	Field Research Executive	
Level 3	Data Entry Executive		

CUSTOMER SERVICE

- Every sector uses Customer Service professionals.
- The Business Process Outsourcing industry uses over 0.5 mn customer service agents as per a NASSCOM report.

- While it is difficult to ascertain the size of workforce engaged in Customer Services, it can be safely seen that there are multiple contexts of customer service and there is constant demand for customer service personnel across industries.
- The role in customer service identified during the study and rationalised as per NSDC norms for qualification development are given below:

Level 7	Head Customer Service			
Level 6	Customer Service Manager	Collections Manager	Customer Service Process Manager	
Level 5	Customer Service Team Leader	Collections Team Leader	Customer Service Quality Assurance Executive	
Level 4	Customer Service Executive cum Customer Service Executive - Call Centre cum Document Checking and Processing Executive cum Transaction Processing Executive		Technical Support - Customer Executive	Field Collection Agent Cum Collections Co-ordinator

OTHERS

- Materials Management
- Environment, Health and Safety (EHS)

Level 6	Manager - Purchases	Manager - Stores and Supplies	Supply Chain Manager	
Level 5	Loading In-charge	Inventory In-charge	Goods Receipt and Dispatch Supervisor	Procurement Agent
Level 4	Supply Chain field Executive	Store Keeper		
Level 3	Store Assistant			

Level 7	Consultant, EHS	Manager - EHS		
Level 6	Waste Processing Manager	Inspector - Health and Safety		
Level 5	Engineer - Health and safety	Occupational Health and Safety Officer	Engineer - Hygiene and sanitation	First Aid Officer
Level 4	Waste Management Executive - General			
Level 3	Medical Assistant			

OTHER SSC REMIT

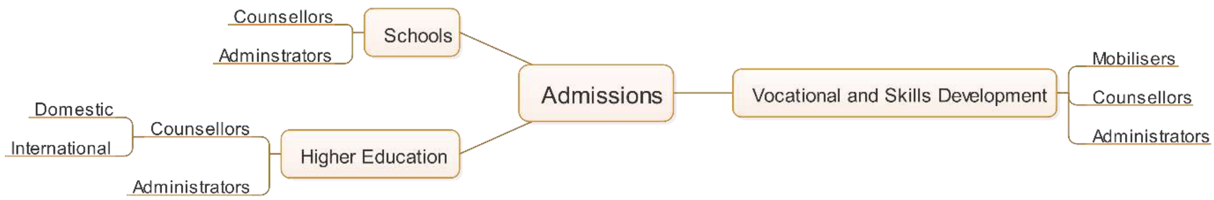
- Finance and Accounts
- IT Support

- These segments were not covered as the Banking, Financial Services and Insurance Sector Skills Council and the IT and ITeS Sector Skills Council (SSC NASSCOM) are assigned the remit of catering to the Skills Development needs of these functions within organisations.
- While both these segments are focused under Staff roles and provide Management support due to overlaps of these segments their numbers will be reduced from the overall estimates of Skills Gap and Demand figures of MEPSC remit.
- It is for this purpose even roles within these were not identified as they exist within the Occupational maps of the respective Sector Skills Councils.

7.3. EDUCATION – NON-TEACHING

ADMISSIONS

Admissions in educational and training institutions triggers a lot of anxiety and need for services in India.



- Admission administrators are those who process admissions within a school, college or a university. This is non-teaching staff segment that has traditionally never been trained except on the job. India has close to 4mn private schools, even if we see the demand of one or two admissions administrators in these and 2-3 administrators in higher education institutions we should have a demand for over 5 mn trained admission administrators in the system.
- Admission counselling is the next role in this space. Admissions counsellor, is the first and most important step leading to a proper gateway to career counselling. Admission counsellors have the latest information about the admission criteria, admission acceptance rates, admission committee expectations and merit scale of almost all prominent schools, colleges and universities. In terms of International University selection meeting a counsellors is the most vital step in the whole procedures to start with. Success to top global universities, in countries like USA, UK, Other European and Asia-Pacific universities depends on the right picks of the universities. Parents and students lack specialized knowledge about the options available. An Access expert can easily recognize, define and quantify individual student strengths, needs, chances and interests and match it to the top universities which will address these most competently and where he has the maximum chances of admission. Expert counsellors are able to prescribe a healthy mix of 'aspirational' schools where the student can hope to gain admission and 'safe' schools where he has appreciable higher chances of acceptance and substantial scholarship support. The long, challenging and often stressful process of admission is hard on students. A counsellor steps into the role of a friend, guide and encourager when the going seems tough. Well-timed and sound advice often spells the difference between gaining the goal or quitting for a student. Survival stories, time management tips, practical strategies, inspiring examples, insightful anecdotes and words of encouragement are the extra arsenal which counsellors often employ to firefight the slow burn out of the waiting process. The final preparation of student admission essays, resume's, scholarship and fee waiver requests, etc require expert advice and guidance, which parents and the students urgently require.
- The third role is a mobiliser which is a role used mostly in the development sector and the Skills Development or VET training programmes.

COUNSELLING

- India’s 350 million students need at least 1.4 million career counsellors to maintain a globally acceptable student-to-school-counsellor ratio.
- India today reports, “Around 85% of students are concerned about which option to choose for higher education and 92% don't get any career related guidance from their schools.”
- The focus will be to empower high schools and colleges with qualified manpower and professional development opportunities to guide students on, where to study, what to study and how to prepare for a suitable and rewarding career.
- Ganesh Kohli, IC3 Conference Chair, ”never have students had so much freedom to choose courses, careers and countries than they do today. “But students need guidance and coaching for career development like any other discipline taught in schools”, he said. “India needs to provide one career counsellor for every 250 students it has”.
- Career counselling has long been a gaping hole in institutions and is even more crucial in the context of the sweeping changes in types of jobs the world is likely to see in the light of emerging technologies from artificial intelligence to gene therapy.
- The impact of lack of students education and career counsellors on students is easiest to understand in the high school context, where students face an increasingly dizzying array of choices about what comes next after high school.
- There are more types of colleges with more specialties than ever before. For students looking for something other than the four-year college track, apprenticeships are gaining prominence once again. According to some, credential-based or technical-skill-focused modules are the new ticket to the middle class.
- But even if high school students settle on a traditional college path, more questions follow: If they choose college, what kind of college? Is there a scholarship for that? And does anybody know how to fill out the required forms? And would a 16-year-old know he/she needed one without a counsellor?
- Without knowing their options, students inadvertently may miss out on the best path forward or simply make no choice at all.
- Students fortunate enough to have engaged parents or other trusted adults in their lives to help them navigate their school years may not be harmed by a lack of in-school supports. Not every student needs the same level of attention. However, as is too often the case when it comes to school resources, the students who most need assistance often attend schools with the fewest supports. For low-income students or those who are the first in their families to attend school or college, the availability of good counselling can determine if they understand their options and are prepared to make informed choices.
- The average school counsellor is often the first point of contact for addressing students’ social-emotional concerns, academic readiness, and career- and college-counselling needs.
- Counsellors help students navigate a laundry list of issues that need to be addressed if students are going to make a successful transition to “what comes next.” They might discuss students’ interests and reviewing class schedules, help students cope with issues at home, and connect students in need of long-term mental-health support to the appropriate outside resources.

PLACEMENTS

- There are over 5500 Business Schools in India all of these have or are expected to have placement cells within the institutions.
- Apart from this all TVET training centres are also expected to have placement officers, sometimes also called as Industry Connect/relationship/liaison officers.
- With over 30000 VTPs in the system the expectation is that each centre would have a designate placement officer.

- There is a greater push within institutes of higher education other than business schools to also build connect with industry. This is a growing trend and is expected to pick up steam going forward as higher education is increasingly moving towards providing vocational and employment oriented courses.
- India has over 39000 colleges and another 1400 independent institutions.
- In addition there are a number of companies that are developing Career Centres to provide counselling and placement support to applicants who are seeking jobs. These are being encouraged by state and central governments. These Centres are likely to hire a few placement officers in each centre. The Confederation of Indian Industry is already facilitating the set-up of these centres in various state.
- Andhra Pradesh has recently announced the set-up of such Centres across all their districts.
- Given the thrust in educational and employability, we estimate that placements and related trained staff will become an integral part of the education and training system.
- We estimate that over 80000-100000 placement officers exist in the country currently and given the growth in education and training space we see at least 2 lakh placement officers required over the next 5 years.
- As career progression Placement officers can move into Counselling, Business Development and Recruitment roles.
- Employment Exchanges are also a key avenue of employment for placement officers. There are about 1000 Employment exchanges across the country.
- Currently there is no structured training programme/framework/qualification for development and certification of skills of placement officers.

EXAMINATIONS AND MANAGEMENT

- Given India's education system with over 1.5 mn schools and 39000 colleges and other independent institutions, over 30,00,000 assessment in TVET and Skills Development per year the examinations and assessments segment is not only growing significantly, it has become a critical to quality factor. By some estimations over 200 mn assessments take place in India annually.
- The system therefore needs Item Writers, Assessment Strategists, Examination Managers, Invigilators and Test Developers, etc.
- With assessment practices and related Quality Assurance procedures having evolved significantly in the past few years, there is increased demand for specialised training and certification of assessors and examination administrators.
- In addition the private skills and pre-recruitment assessments space has also grown rapidly in the past decade and with poor employability skills and ever increasing demand from employers for pre-employment testing and screening this requirement is expected to grow in double digits for years to come.
- It is estimated that the Examinations and Assessments workforce required to meet the demands of the education system
- Some of the major players operating in India assessment services market are MeritTrac Services Pvt. Ltd., Mercer-Mettl Online Assessment, Aspiring Minds, CoCubes Technologies Pvt. Ltd., eLitmus Evaluation Pvt. Ltd., Tata Consultancy Services Limited, EdCIL (India) Limited, Prometric Testing Pvt Ltd, and Pearson India Education Services Pvt. Ltd., among others.
- With the Assessment and Examinations market growing at over 25% YOY, we expect the current workforce engaged in Examinations and Assessments space to be growing even more rapidly as there is a dearth of trained assessors and examiners in India. There is no recognised training for Assessors, and MEPSC is one of the first bodies in India to create an Assessor qualification pack for training, assessing and certifying assessors.

CURRICULUM, CONTENT DEVELOPMENT AND TRANSLATION SERVICES

- India has become the largest market for e-learning after the US, and the sector is expected to receive a boost from the government's Rs.1.13 trillion Digital India initiative, says a recent report by the UK-India Business Council.
- Instructional design, curriculum and content development is a growing segment in the Educational Space.
- A number of colleges and training providers are now offering courses for Instructional design now including:
  - Symbiosys Centre of Distance Learning – Post Graduate Diploma in Instructional Design (PGDID)
  - SNDT Women's University – Offers a 4-credit Online Course on Instructional Design and a Master's in Educational Technology with Computer Applications (METCA)
  - ibruk Consulting Pvt Ltd – Various Certificate Courses in Instructional Design and Technical Writing
- Job options in India show up in large information technology or knowledge process organisations, but with everyone trying their hands at e-learning, there are jobs in that area as well. A few companies that aspirants can work for include Tata Interactive Services, Wipro Technologies, Aditya Birla Group, Accenture, NIIT, Sify, and Aptech among many others.
- Once they understand the importance of this area, even smaller companies are hiring instructional designers, on a need-basis. These jobs are either for a person who can work full time or on a project basis. Designers are promoted as project managers in most organizations.
- Today, the need for instructional designers is being felt in corporate training institutes, in the public sector as well as in educational institutes. Earlier, the role of an instructional designer was restricted to designing curricula for instructional books or manuals. Now instructional designers are much more tech savvy and offer consultation in fields ranging from educational TV, computer-based teaching, instructional video, business training and multimedia to print media and classroom design.
- In the international arena, learned instructional designers are in demand in several countries like Singapore, Malaysia, the Middle East, Canada, USA, the UK, Australia and New Zealand.
- At the entry level, an instructional designer can earn anything between Rs. 25,000 and Rs. 30,000, based on the skill and prior exposure. With increased experience, these figures definitely shoot up, more like upwards of Rs. 50,000, some even earning touching a lakh a month.
- Translation services in India given the number of languages and International translations services are a hugely growing segment in India. With increased consumption of content both in print and online this is segment which has been growing despite the constant threat of Machine translation usurping jobs in the sector.
- The Business Translation Service in India is competitive internationally, based on the fact that rate charges in India is way affordable as compared to other translation services in other countries.
- There are various segments of the business including research translation, document translation, audio/video translation, web-content translation, telecommunication translation, etc.
- The market is growing and has various types of companies within it including ITeS Companies, Analog Translation Service largely comprising of small and micro-companies, etc. The start-up environment in language translation also is growing rapidly and several big funding deals have transpired in the recent past. In order to test and verify Machine translation a large number of people are being engaged as testers for the same.
- Remuneration levels of a translator can be based on volume of work or on a salary basis they can earn from INR 20000 upwards to even INR 60000 per month.

EARLY CHILD CARE AND EDUCATION (ECCE)

- India with upwards of 15cr children in the age group of 0-6 years is home to one of the largest population of children.
- The demands for early education and care have, therefore, led the Indian education sector on a brisk growth track. The preschool education industry itself in India is currently valued at more than 15,000 Crores, growing at a high CAGR of 23%.
- Currently the preschool industry runs on three models. The unorganized sector which is made up of local home grown preschools and constitutes around 70-80% of the market. Organized preschools, that operate on a franchisee model and are relatively smaller in number. The third model is the school feeder model with some regular K-12 school starting their own preschools to tap the early toddler market as well.
- Indian preschool market is currently highly underpenetrated with only 17% of the children in the age group of 1.5-4 years attending preschool. The percentage is even lower in the smaller towns where less than 10% of children attend preschool. With professional quality education making its way into preschools and awareness regarding how early education can help in emotional, physical and intellectual well-being of children, more and more parents are looking at preschool options for their children.
- As the market gets more organized, a number of innovative and professional players have made their way into preschool education. There is a greater emphasis on using researched curriculum and modern tools to create an interactive learning environment for young minds rather than simply filling in time. Also the quality of infrastructure has significantly improved as investments in the sector have increased. Some preschools now sport the latest technology to ensure parents and children stay involved and engaged.
- The biggest challenge faced by preschools in the unorganized sector is the lack of quality teaching staff. Training is another big challenge as there is lack of good trainers and training material in India that can help teachers understand how to work effectively with tools that have been developed especially for development of young minds.
- Most preschools maintain a teacher student ratio of 1:10, which means that you need a higher number of teachers as compared to regular schools. Since the pay scales are not very high it is very difficult to attract quality teachers.
- Teacher training is an expensive proposition and since attrition rates are high it is difficult to ensure ongoing training for further development
- A big challenge for home grown schools is the lack of development of an effective curriculum. A curriculum that is not research based and well-designed automatically results in lack of substantial learning for students. From the business perspective, in turn, it leads to lack of any differentiation for the school, which impacts its admissions and profitability.
- In India, according to Census 2011 data there are 164.48 million children of 0-6 years of age. Recognizing the need to provide quality pre-primary programmes, a number of constitutional and policy provisions have been made such as the 86th Constitutional Amendment which introduced Article 21A on the right to free and compulsory education for 6-14 years old children and Article 45 to urge states to provide ECCE for all children until they complete the age of six years.
- The Ministry of Women and Child Development (MWCD) is the nodal department for ECCE. MWCD is responsible for the Integrated Child Development Services (ICDS) programme, which is a centrally sponsored and state administered ECCE programme, covering around 38 million children through a network of almost 1.4 million anganwadi centres (a village courtyard). ICDS includes delivery of an integrated package of services such as supplementary nutrition, immunization, health check-up, preschool education, referral services and nutrition & health education. ECCE is one of the components and aims at psycho-social development of children and developing school readiness.

- There is no legal framework that specifies requirements and standards of ECCE teacher training programs in India; instead various education channels provide different types of training. Some higher education institutions implement the Nursery Teachers Training (NTT) program (two-year training for preschool teachers) approved by the National Council for Teacher Education (NCTE). The diploma granted to teachers who completed the NTT program is considered as an essential qualification for teaching in some public schools and government-run preschools. There are also online ECCE teacher training programs offered by online educational institutions. For example, the Indira Gandhi National Open University (IGNOU) offers a two-year diploma course for those who complete upper-secondary education (Grade 12; equivalent to the third year of high school in Japan), and the National Institute of Open Schooling (NIOS), a one-year certificate course for those who complete lower-secondary education (Grade 10; equivalent to the first year of high school in Japan). The ECCE teacher training course is also included in the curriculum of regular schools at the stage of upper-secondary education as "vocational education." The above training courses require a relatively long time to complete, while the teacher training course offered at Anganwadi centers takes only two weeks.
- Most teachers working at Anganwadi centers, NGOs, and private preschools are those with little training without any teaching qualifications, and thus hired for a low salary. The majority of these teachers are women due to a social norm that women are more capable of looking after infants and toddlers. Some criticize that women nursery teachers are being exploited by school owners who take advantage of the absence of laws regulating the treatment of teachers, while others say that these educational facilities provide employment opportunities for women who have no teaching qualification.
- Given the ratio of children to teacher/attendants, India needs approximately 4 mn ECCE professionals.

PRINTING AND PUBLISHING

- India is the world's seventh largest book publishing country and there are more than 16,000 publishers in India, India is also the world's third largest book market, more than 80,000 new titles in 24 different languages are published every year in India.
- Whenever we are talking about the book business, we need to segregate this into two branches – education and trade. Of the Rs 35,000-cr book publishing industry in India, more than 70% is education publishing.
- The Indian Print Industry grew at 3% to reach INR 30300 Crores in 2017.
- The Indian Printing Industry comprises of more than 250,000 big, small and medium printing companies.
- The estimated turnover of the industry is USD 11 billion. There has been a revolutionary change in the last 15 years in the printing industry in India.
- Printing and Print – Packaging industry in India is growing; people are taking keen interest in this key industry now. There are more than 36 printing institutes some of these giving even post-graduate education. Every year more than 3500 new printing engineering graduates joins this industry, while still much more get on the spot training in the print shops.
- India is the country with largest number of printing presses in the world (Europe: 1.18 lakh, China: 1.13 lakh, USA: 50,000, Japan: 45,000, Korea: 42,000 and Australia: 40,000). India with approx. 25 lakh employees is second only to China (30.25 lakh) so far as the number of employees in printing sector is concerned. Employees and number of printing companies are decreasing by 6 per cent world over, including China, whereas in India it is progressing at 5.2 per cent annually.
- Our largest customer is not in Delhi or Mumbai but in Kolkata. And the town of Mathura, with more than 50 Welbound post-press machines, could be the largest producer of textbooks in the country.
- The market size of the packaged printing sector increased from USD 10.2 billion in 2014 to USD 12.7 billion in 2017 and comprised of 43% of the total print product sales in 2017.
- The packaged printing industry is growing at an annual rate of 17%,

- Commercial printing is growing at an annual rate of 10-12% and digital printing at a robust growth rate of 30%. However, the impeding growth of the Indian Printing Industry can be held accountable for by the global financial crisis, but the total print products industry will continue to grow at an annual rate of 6.8% over the years.
- The publishing printing market size grew from INR 20,859 crore in 2012 to 27,607 crore in 2017-2018 with population increase, rising literacy rates and a growing economy despite the digital invasion.
- The Print Packaging market is expected to increase 7.8% in a five year period. The market size of the package printing sector increased from INR 53,374 crores in 2012 to 77,714 crore in 2017-18, making up 43% of total print product sales in 2017.
- All India Federation of Master Printers (AIFMP) representing 250,000 printers is the world's largest printers' association. Established in 1953 AIFMP is the one and only apex body of Indian Printing Industry and draws its strength from 74 regional affiliate associations around the country.
- Roles identified in the Printing and Publishing Sector are provided below:

Level 6	Managing Editor	Author		
Level 5	Graphic Designer	Copyedit Editor	Sponsoring Editor	Commissioning Editor
Level 4	Offset Printing Machine Operator	Digital Printing Machine Operator	Screen Printing Machine Operator	Peer Review Associate
Level 3	Inking Man	Feederman	Information and Media Miner	

COMMUNITY EDUCATION, SOCIAL DEVELOPMENT AND THE VOLUNTARY SECTOR

- "Non-profit institution are legal or social entities created for the purpose of producing goods and services whose status does not permit them to be a source of income, profit, or other financial gain for the units that establish, control or finance them. In practice their productive activities are bound to generate either surpluses or deficits but any surpluses they happen to make cannot be appropriated by other institutional units." That basis for defining NPIs, which focuses on the common characteristic that they do not distribute their profits, in a central feature of most definitions of "the non-profit sector" in law and social science literature.
- Non-profit institutions, so defined, thus differ from the other three major types of institutional units defined within SNA, namely, corporations (financial and non-financial), government agencies and households, in the following:
    - Corporations differ from NPIs in that they are "are set up for purposes of engaging in market production" and "are capable of generating a profit or other financial gain for their owners";
    - Government units differ from NPIs in that they are "unique kinds of legal entities established by political processes which have legislative, judicial or executive authority over other institutional units within a given areas;" including "the authority to raise funds by collecting taxes or compulsory transfers from other institutional units."
    - A household differs from an NPI in that it is "a small group of persons who share the same living accommodations, who pool some or all of their income and wealth, and who consume certain types of goods and services collectively, mainly housing and food…"

DIVERSITY OF THE VOLUNTARY SECTOR

- In India, societies, associations, organisations, trusts or companies registered under the Societies Registration Act, 1860; the Indian Trusts Act, 1882; the Charitable & Religious Trusts Act, 1920 or as a charitable company under Section 25 of the Companies Act, 1956 are considered as VOs / NGOs. In addition, there are informal groups working at grassroots level without being registered under any legislation but may also be considered as part of voluntary sector.

- VOs may be working in the field of welfare of disabled; development of other disadvantaged sections like SCs/STs, children & women in education; environment; human rights; and on issues like resettlement & rehabilitation of those displaced by big projects, right to information and so on. VOs may take up issues concerning a particular village or a community to the global issues like impact of WTO or global warming. The range of associations or societies may vary from a resident welfare association to an advocacy organisation. The substantive areas of work of VOs have changed considerably over time.
- The following typology of civil society associations is available from a study by Rajesh Tandon (20012):
    - Traditional Associations: Such associations exist around a social unit either defined by a tribe, ethnicity or caste. Associations of this variety undertake a wide range of functions in the lives of those citizens. Several important struggles to protect and advance customary rights of tribals over natural resources in different parts of the country have been led by such associations.
    - Religious Associations: Over the centuries, new sects and religions were born and incorporated into Indian life. Charity, help to the needy, service to the poor and daan (giving) have been uniformly recommended by all these religions and sects in India. Activities are carried out in the areas of education, health care, drinking water, afforestation, social welfare, etc.
    - Social Movements: In the contemporary Indian context, a number of social movements, spearheaded by social movement organisations (SMOs) have emerged as major manifestations of civil society. These movements are of several types such as focusing on the interest and aspirations of particular groups - SCs, STs and women; protests against social evils like liquor, dowry, inheritance rights etc.; protests against displacement due to big development projects; campaigns against environmental degradation, corruption and for rights to information, education and livelihood.
    - Membership Associations: Membership organisations may be representational – set up to represent the opinions and interest of a particular category of citizens e.g. unions of rural labour, farm workers, women workers, consumer associations etc., professional – formed around a particular occupation or profession e.g. association of lawyers, teachers, engineers, managers, journalists etc., social-cultural – organised around a social or cultural purposes e.g. Nehru Yuvak Kendras , clubs for sports, Natak Mandalis etc. and self-help groups – a growing category of membership organisations e.g. savings and credit groups etc.
    - Intermediary Associations: These associations function between individual citizens and macro state institutions like the bureaucracy, judiciary and police etc. These could be of several types, e.g. service delivery, mobilizational, support, philanthropic, advocacy and network.

NOMENCLATURE OF THE DEVELOPMENT SECTOR

- Traditionally, NGOs are known as Voluntary Organisations (VOs) & Voluntary Agencies (VAs) and recently as Voluntary Development Organisations (VDOs) or Non-Governmental Development Organisations (NGDOs) or Non-Profit Institutions (NPIs). There are equivalent names for NGOs available in different Indian languages; like in Hindi NGOs are called Swayamsevi Sansthayen or Swayamsevi Sangathan.
- The social development sector has been defined by various names 'non-governmental organisations', 'voluntary organisations', 'third sector', 'non-profit sector', 'independent sector', civil society', etc.
- The current terminology describing activities and associations of this sector has several themes. In the Indian context, the most prevalent term used to describe initiatives of this kind as noted above is voluntary. `Voluntary initiatives', `voluntary associations', `voluntary agencies', `voluntary

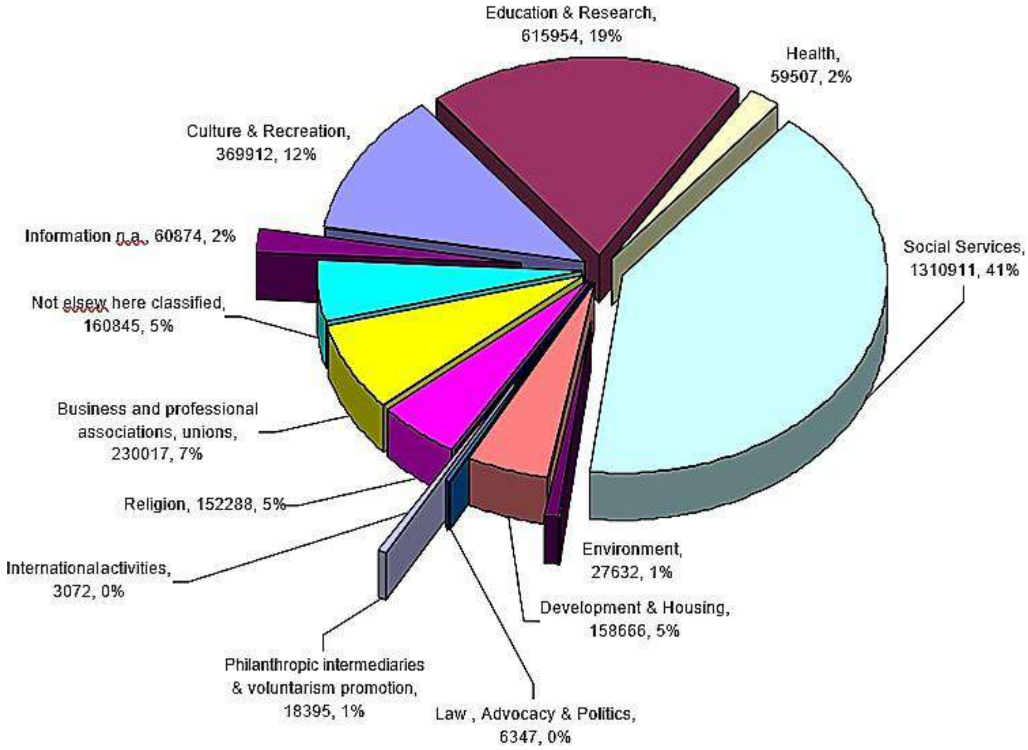
organisations', etc. describe a wide array of voluntary actions (which has the most prevalent usage in the Indian context). Predominantly, this usage describes grassroot level initiatives.

- It includes Community Based Organisations (CBOs) and People's Organisations (POs), which may be very micro and local in their actions.
- Definitions are changing as civil society is recognized as encompassing far more than a mere 'sector' dominated by the NGO community. As new civil society actors blur the boundaries between sectors and experiment with new organisational forms, both online and offline, the civil society today includes an even wider and more vibrant range of organised and unorganised groups.
- Broadly speaking civil society is commonly defined as "the area outside the family, market and state", encompassing a spectrum of civil society actors and entities with a wide range of purposes, structures, degrees of organisation, membership and geographical coverage. While descriptions vary across institutions and countries, the 'civil society ecosystem' typically includes:
    - NGOs, non-profit organisations
    - CSOs
    - Online groups and activities including social media communities that can be 'organised', but do not necessarily have physical, legal or financial structures
    - Social movements of collective action and/or identity, which can be online or physical.
    - Religious leaders, faith communities, and faith-based organisations.
    - Labour unions and labour organisations representing workers.
    - Social entrepreneurs employing innovative and/or market oriented approaches for social and environmental outcomes.
    - Grassroot associations and activities at the local level
    - Cooperatives owned and democratically controlled by their members
- The World Bank has adopted a definition of civil society developed by a number of leading research centres: "the term civil society to refer to the wide array of non-governmental and not-for-profit organisations that have a presence in public life, expressing the interests and values of their members or others, based on ethical, cultural, political, scientific, religious or philanthropic considerations. CSOs therefore refer to a wide of array of organisations: community groups, NGOs, labour unions, indigenous groups, charitable organisations, faith-based organisations, professional associations, and foundations"

NEED

- NPIs constitute a significant and growing economic presence in counties throughout the world, accounting for 7 to 10 per cent of non-agricultural employment in many developed countries and considerable shares of the employed labour force in developing countries as well;
- NPIs are formed for various purposes. In India the number of NPIs registered as societies are distributed across functions in the following manner:

Figure 3.2: Percentage Distribution of Societies registered under various activities/purposes



- The above figure indicates that out of the total registered societies,
    - 13,10,911 (41%) are under Social Services activities
    - 6,15,954 (19%) under Education & Research
    - 3,69,912 (12%) under Culture & Recreation
    - 2,30,017 (7%) under Unions
    - 1,58,666 (5%) under Development & Housing
    - 1,52,288 (5%) under Religion
    - 59,507 (2%) under Health
    - 27,632 (1%) Environment
    - 18,395 (<1%) Philanthropic intermediaries and voluntarism promotion
    - 6,347 (0.20%) Law, Advocacy & Politics
    - 3,072 (0.10%) International activities
    - and others.
    - This information is not available for 60,874 (2%) societies.
    - The top three activities account for 72% of the registered societies.

Table: Distribution of Societies registered under various activities/purposes by location (Rural/Urban)

Activity Code	Activity	No. of Societies		
		Rural	Urban	**Total**
1	Culture & Recreation	2,34,583	1,35,327	**3,69,912**
2	Education & Research	2,99,858	3,16,085	**6,15,954**
3	Health	30,553	28,953	**59,507**
4	Social Services	8,09,920	5,00,949	**13,10,911**
5	Environment	18,661	8,970	**27,632**
6	Development & Housing	91,640	67,011	**1,58,666**
7	Law, Advocacy & Politics	2,508	3,838	**6,347**
8	Philanthropic intermediaries and voluntarism promotion	9,809	8,586	**18,395**
9	International activities	1,188	1,884	**3,072**
10	Religion	88,667	63,619	**1,52,288**
11	Business and professional associations, unions	1,33,311	96,701	**2,30,017**
12	Not elsewhere classified	1,09,692	51,144	**1,60,845**
	Information Not available	32,991	27,880	**60,874**
	Total	**18,63,381**	**13,10,947**	**31,74,420**

Figure: Distribution of Societies (in lakh) registered under various activities/purposes by location (Rural/Urban)

DISTRIBUTION OF TOTAL WORK FORCE OF THE SOCIETIES

- The total work force of the societies, as per data received, is around 182 lakh.
- Number of males engaged in these societies is 72% which is significantly higher than the female percentage. 63% of the workforce is engaged in the societies located in rural areas.
- The distribution of the total workforce in the societies in the rural and urban areas is given in the Table below:

Table: Location wise Distribution of Total Work Force of the Societies

Location	No. of Societies (in '000)	Distribution of total Work Force (in '000)			% distribution by location	Average force per society	% Distribution of total Work Force		
		Male	Female	Total			Male	Female	Total
Rural	433	8203	3197	11400	62.6	26	72	28	**100**
Urban	261	4985	1829	6814	37.4	26	73	27	**100**
Total	**694**	**13188**	**5026**	**18214**	**100**	**26**	**72**	**28**	**100**

- Distribution of total work force of the Societies by sectors they serve is given in Table 5.10 and Figure 5.7. The average workforce is maximum in the household sector (87.7%) and minimum in the industries sector (3%).

S. NO	Serving which Sector	No. of Societies	Male	Female	Total	% work force per Institution
1	Government	56	1036	607	1644	**9**
2	Industries	22	487	115	602	**3.3**
3	Household	616	11666	4303	15968	**87.7**
	Total	**694**	**13189**	**5025**	**18214**	**100**

- Distribution of total work force of the Societies by Purposes is given in the Table below. The average workforce is maximum for the purpose Law, Advocacy & Politics (100 persons per society engaged in this activity) followed by 74 for Environment. For the remaining activities, the average workforce varies between 20 and 40.

Table: Purpose wise Distribution of total work force of the Societies

S.No	Activity	No. of Societies (in '000)	Total work force (in '000)			Average Workforce
			Male	Female	Total	
1	Culture & Recreation	106	2871	575	3445	**32**
2	Education & Research	167	2851	1445	4295	**26**
3	Health	21	323	158	481	**23**
4	Social Services	254	3781	1683	5464	**22**
5	Environment	9	369	274	642	**74**
6	Development & Housing	32	475	272	747	**24**
7	Law, Advocacy & Politics	1	124	14	138	**100**
8	Philanthropic intermediaries and voluntarism promotion	2	28	22	50	**30**
9	International activities	1	63	16	79	**154**
10	Religion	30	629	115	744	**25**
11	Business and professional associations, unions	46	1119	283	1402	**30**
12	Not elsewhere classified	25	549	162	711	**28**
13	Information Not available	1	8	8	16	**26**
Total		**694**	**13188**	**5026**	**18214**	**26**

- Key roles identified in this sector are as follows:

Level 6	Counsellor, addictions	Counsellor, bereavement	Counsellor, child and youth	Counsellor, family	Counsellor, marriage	Counsellor, sexual assault	Suicide Prevention Counsellors
Level 5	Proposal Writer	Fund Raising Specialist					
Level 4	Village Level Mobilizer	Community Social Worker	Social Worker in Administration, Policy and Research	Old Age Social Worker	Medical and Health Social Worker	Substance Abuse Social Worker	Mental Health Social Worker
	Criminal Justice Social Worker	Disable Welfare activities Social Worker	Environment Welfare activities Social Worker	Child, Family, and School Social Worker	Psychiatric Social Worker	Military and Veterans Social Worker	Palliative and Hospice Social Worker
Level 3	Aanganwadi Assistant						

7.4. PROFESSIONAL AND EMPLOYABILITY SKILLS

LANGUAGE SKILLS

- 12% of the population only fluent in English Language
- International Language learning is also gathering pace and is a growing market
- Top Drivers for learning languages include:
  - Employment
  - Education
  - Social Acceptance and Status
- The market can be sliced into three broad segments of Business to Consumer (B2C), Business to Business (B2B) and Business to government (B2G). English language cuts across these segments to include the following:
  - Kindergarten to Class 12 (K12) upto 18 years old
  - Vocational training
  - Coaching, including subject based tuition, graduation and post-graduation test preparation
  - Higher Education including MBA and Engineering colleges
  - Corporate training
  - IELTS examination training
- The market is growing at a rate of 20-40% across these segments.
- The Vocational thrust provided by NSDC has also boosted the need for training and assessment delivery in these segments.
- This segment does not have an Indian reference framework and therefore International players in the market are found to be most credible which includes, British Council, Cambridge, etc.
- There is a great need for an Indian framework of reference, that allows for capacity building and recognition of Indian capabilities in this sector, allowing India to even export its services across the globe.
- English Language Teachers Association of India, English and Foreign Languages University are key Indian stakeholders that must be engaged for developing products and strategies for approaching this market.
- Vocational, Coaching and Corporate training segments are within the purview of MEPSC for impacting. It is estimated that over 1 lakh trainers will be required in these segments each year to meet demand of English Language training alone.
- Market for professional experts in foreign languages, particularly in European languages is expected to widen up in couple of decades. Evalueserve, an international research company claims that there would be a requirement of more than 1,60,000 foreign language professionals in various BPO, IT and KPO processes in India. Moreover, there is a strong requirement for skilled foreign language professionals who can effectively work in language-sensitive processes outsourced to India by companies located in the European countries. The research company concludes that the total addressable market for language-sensitive work is worth USD 14.4 billion.

SOFT SKILLS

Which subjects have more employable talent

CHANGE IN EMPLOYABILITY

Subject	2014	2015	2016	2017	2018	2019	
BE/B.Tech	51.7	54	52.5	50.7	51.5	57.1	▲
MBA	41	44	44.6	42.3	39.4	36.4	▲
BA	19.1	29.8	27.1	35.7	37.4	29.3	▼
B.Com	27	26.5	20.6	38	33.9	30.1	▼
B.Sc	41.7	38.4	35.2	31.8	33.6	47.4	▼
MCA	43.6	45	39.8	31.4	43.8	43.2	▼
ITI	46.9	44	40.9	42.2	29.5	NA	▼
Polytechnic	11.5	10.1	15.9	25.8	32.7	18	▼
B.Pharma	54.6	56	40.6	42.3	47.8	36.3	▼

TOI FOR MORE INFOGRAPHICS DOWNLOAD

- Employability of Graduating students is abysmal as can be seen, in the most recent survey findings of over 3 lakh students, in the table above.
- There are other surveys which show an even more dismal picture.
- The fourth edition of the National Employability Report for Engineers, 2016 by Aspiring Minds, an employability evaluation and certification company, found that only about 18 percent of engineers were employable for the software services sector. The rate in all other sectors — civil to mechanical — was 7 percent or less. The report is based on a sample of more than 150,000 engineering students from 650+ engineering colleges who appeared for AMCAT: Aspiring Minds Computer Adaptive Test.
- Soft Skills, also often put under Employability Skills, or Professional Skills, Life Skills or Social and Emotional Learning, or Key Skills are considered to be essential for not only working in professional set-ups, but for working effectively with others and as an essential aspect of employability.
- A survey by the Institution of Engineering and Technology (IET) shows that nearly two thirds (65%) of mid-size companies choose to impart soft-skill training over technical training to new employees. In comparison, only a quarter of large-sized companies focus on soft skill development, and the remaining 75% prefer imparting technical skill.
- 48% of India employers report difficulties filling job vacancies due to talent shortages. Lack of soft skills (36%) and looking for more pay that what is offered (34%) are the top reasons that employers in India are not able to fill the positions.
- Communication Skills, Analytical thinking, Punctuality/Discipline and Confidence are still the top soft-skills sought by employers.
- The country has no real framework for Soft Skills/Employability Skills and we are currently in the process of drafting a white paper for the way forward on this.
- There are Six National Occupational Standards that have recently been drafted by MEPSC for inclusion in TVET training programmes to facilitate the inclusion of English, Employability Skills and Entrepreneurship in PMKVY and other programmes.
- A proposal to develop 2-3 additional Qualification Packs on Soft Skills is also proposed, but needs to be put to a quorum to support and champion it.
- Soft Skills Trainers are also not benchmarked and certified and that is a huge gap that needs to be addressed even before the training for the beneficiaries is rolled out.
- A similar exercise has to be done for orientation, development and certification of Assessors.

- Employability Skills are currently being provided through the following mechanisms:
    - Foundational Skills (Schools, Community)
    - Finishing Schools
    - Language Schools
    - On-the-Job Training
- The vocational space is giving a boost to demand for trained personnel in this area.
- There isn't a framework for defining and scoping soft skills and related standards and qualifications in India. There is a huge need for it to ensure that there is reduced ambiguity, acceptance of learning outcomes and expectations from training and development in this space.
- MEPSC is perfectly positioned to lead this activity. In order to move forward it will need a detailed strategy with identification and engagement of key stakeholders, to develop these with credibility.
- We are currently in the process of drafting this strategy and an approach paper on the same.

7.5. ENTREPRENEURSHIP

- There is a growing need for Entrepreneurship Training and Developing in the country. Not only is 51% of India self-employed, there is great amount of disruption occurring the market with workforce being asked to transition from traditional and legacy job structures and domains to new economic and work environment.
- While the Government has launched significant initiatives to encourage and support Entrepreneurship development in the country, the Sector Skills Councils are being encouraged to support these initiatives within their respective sectors.
- Some of the government initiatives are provided below:

Government Initiatives and Schemes
Start-Up India
Make in India
Atal Innovation Mission
Support to Training and Employment Programme for Women (STEP)
Jan Dhan- Aadhaar- Mobile (JAM)
Digital India
Biotechnology Industry Research Assistance Council (BIRAC)
Department of Science and Technology (DST)
Stand-Up India
Trade related Entrepreneurship Assistance and Development (TREAD)
Pradhan Mantri Kaushal Vikas Yojana (PMKVY)
National Skill Development Mission
Science for Equity Empowerment and Development (SEED)

- While there a number of institutes including EDIs, Private and Public Incubators, Business Schools, Development Agencies, Industry Associations, NGOs, etc. developing and delivering programmes for Entrepreneurship development, there is a huge gap of a skills and development framework for Entrepreneurship Development in the country. Not only have we been unable to benchmark level of skills and knowledge requirements for Entrepreneurs, the classification and scoping is also a big void.

- In effect there are no guidance and/or evaluative frameworks for any of these training and development initiatives, that leaves huge potential for inefficiencies and ineffectiveness. This will potentially become a cause for unrest and loss of credibility at some point.
- In order to truly support these initiatives and ensure accountability there has to be a framework for setting standards and evaluating output and outcomes of this.
- In addition it is important that Entrepreneurship Skills and Development need nuances are brought out to educate and guide fit-for-purpose initiatives.
- Another aspect of these would be to ensure that linkages are established for stage wise support required for Entrepreneurs for development purposes, without undermining the ethos and requirement of Entrepreneurship that defines the very purpose and existence of it. One must understand that Entrepreneurship is about initiative, perseverance, creative problem solving and getting meaningful and sustainable results through development of self and others. It is important to note that this is not a dole scheme.
- We are currently working with MEPSC to develop a white paper on way forward for Entrepreneurship Development in the Country, focusing on creation of a framework of skills development that is firt-for-purpose and context.

CONCLUSION

At the interim report stage while we are able to outline scope and some aspects of demand and need for the constituent segments, there is still much work to be done to arrive at a more comprehensive view of each of the segments. The work is challenged by lack of data availability and the reluctance of companies/organisations to provide meaningful, reliable and comprehensive data. We are overcoming this by attempting to segment the data collection efforts in stages and therein making it easier for companies to share data. It is imperative that AIMA and MEPSC continue to work with us to engage with larger number of relevant organisations at the right levels to bring effectiveness to the data collection efforts.

We can at this stage not conclude on annual, three and five year demand figures within segments and overall, as the primary data collection has to have more data points in order to be meaningful. We will by the end of this exercise be able to convincingly provide arguments backed by data for more precise decision making.

Active Companies as on 31st March, 2017

(₹ in Crore)

Sl. No.	Type of Company	Number	Authorised capital
(1)	(2)	(3)	(4)
I	**Companies Limited by Shares**	**11,62,181**	**5,422,834.33**
	(a) Government Companies	1,618	1,431,377.49
	i) Public	1,156	1,374,503.41
	ii) Private	462	56,874.08
	iii) OPC	-	-
	(b) Non-Government Companies	11,60,563	3,991,456.84
	i) Public	63,713	2,230,184.78
	ii) Private	10,85,872	1,760,994.26
	iii) OPC	10,978	277.80
II	**Companies with Unlimited Liability**	**388**	**3,022.04**
	(a) Government Companies	1	1,000.00
	(b) Non-Government Companies	387	2,022.04
III	**Liability limited by Guarantee**	**6,734**	**2,195.36**
	(a) Government Companies	8	425.06
	(b) Non-Government Companies	6,726	1,770.30
	Total	**11,69,303**	**54,28,051.73**

Active Companies Limited by Shares as on 31st March, 2017

(₹ in Crore)

Sl. No.	Companies Limited by Shares	Government	Non-Government	Total
1	**Public Limited**	**1,156**	**63,713**	**64,869**
	Of which-			
i	*Listed*	64	6,640	6,704
ii	*Unlisted*	1,092	57,073	58,165
2	**Private Limited**	**462**	**10,96,850**	**10,97,312**
	of which			
	One Person Company	-	10,978	10,978
	Total	**1,618**	**11,60,563**	**11,62,181**

Number of Active Companies as on 31st March, 2017
(State-Wise Distribution)

(Authorized Capital in ₹ Crore)

State/UT	Private		Public		Total	
	No. of Companies	Authorized Capital	No. of Companies	Authorized Capital	No. of Companies	Authorized Capital
NORTHERN REGION						
Chandigarh	7,435	6,192.77	642	4,890.20	8,077	11,082.97
Delhi	2,05,741	4,31,950.71	11,749	5,84,936.23	2,17,490	10,16,886.95
Haryana	27,013	62,409.64	1,049	75,331.95	28,062	1,37,741.59
Himachal Pradesh	3,295	6,466.10	228	14,654.30	3,523	21,120.39
Jammu & Kashmir	2,698	7,727.48	129	747.17	2,827	8,474.65
Punjab	15,021	11,951.63	1,727	77,533.89	16,748	89,485.52
Rajasthan	36,780	15,454.28	1,606	88,073.66	38,386	1,03,527.95
Uttarakhand	4,417	2,686.68	261	10,920.43	4,678	13,607.12
Uttar Pradesh	59,130	33,844.06	3,856	2,48,410.77	62,986	2,82,254.83
Total	**3,61,530**	**5,78,683**	**21,247**	**11,05,499**	**3,82,777**	**16,84,182**
EASTERN REGION						
Arunachal Pradesh	191	427.26	16	1,059.95	207	1,487.21
Assam	5,300	5,327.04	521	18,738.51	5,821	24,065.55
Bihar	16,968	8,017.32	681	31,912.51	17,649	39,929.83
Jharkhand	7,853	14,361.24	444	18,097.73	8,297	32,458.97
Manipur	275	222.53	19	373.30	294	595.83
Meghalaya	445	872.35	112	10,583.34	557	11,455.69
Mizoram	41	56.65	5	49.10	46	105.75
Nagaland	184	349.84	15	77.51	199	427.35
Odisha	13,752	16,511.16	1,067	32,128.09	14,819	48,639.24
Sikkim	2	0.02	-	-	2	0.02
Tripura	243	283.05	31	3,289.81	274	3,572.86
West Bengal	1,29,785	1,18,535.84	11,275	1,84,079.35	1,41,060	3,02,615.19
Total	**1,75,039**	**1,64,964**	**14,186**	**3,00,389**	**1,89,225**	**4,65,353**
WESTERN REGION						
Chattisgarh	6,693	7,048.14	513	34,680.67	7,206	41,728.81
Dadra & Nagar Haveli	305	507.72	63	9,455.60	368	9,963.32
Daman and Diu	181	1,242.21	42	944.16	223	2,186.37
Goa	5,040	5,619.79	160	2,353.24	5,200	7,973.03
Gujarat	54,824	1,00,264.25	4,223	3,67,246.33	59,047	4,67,510.59
Madhya Pradesh	22,173	16,079.71	1,546	74,022.26	23,719	90,101.97
Maharashtra	2,29,012	4,78,417.76	12,053	10,78,639.47	2,41,065	15,57,057.23
Total	**3,18,228**	**6,09,180**	**18,600**	**15,67,342**	**3,36,828**	**21,76,521**
SOUTHERN REGION						
Andaman & Nicobar	288	122.11	5	10.05	293	132.16
Andhra Pradesh	16,551	25,606.56	855	41,405.05	17,406	67,011.61
Karnataka	67,201	1,30,431.90	2,006	1,66,978.70	69,207	2,97,410.59
Kerala	27,704	25,545.35	1,570	27,841.33	29,274	53,386.68
Lakshadweep	12	10.27	-	-	12	10.27
Puducherry	1,453	3,119.35	58	464.70	1,511	3,584.04
Tamil Nadu	74,962	1,79,082.34	4,945	2,02,286.48	79,907	3,81,368.83
Telangana	59,762	1,03,855.08	3,101	1,95,235.71	62,863	2,99,090.78
Total	**2,47,933**	**4,67,773**	**12,540**	**6,34,222**	**2,60,473**	**11,01,995**
Grand Total	**11,02,730**	**18,20,600**	**66,573**	**36,07,452**	**11,69,303**	**54,28,052**

The top ten states/UTs in terms of the number of Total Active Non-Government Companies (both Public and Private) were: Delhi, Maharashtra, West Bengal, Tamil Nadu, Telangana, Gujarat, Karnataka, Uttar Pradesh, Rajasthan and Kerala.

Economic Activity-wise Active Companies as on 31" March, 2017

(Authorized Capital in ₹ Crore)

Sl. No.	Economic Activity	Private		Public		Total	
		Number	Authorized Capital	Number	Authorized Capital	Number	Authorized Capital
I	**Agriculture and Allied Activities**	**29,936**	**19,951.83**	**2,910**	**33,526.40**	**32,846**	**53,478.23**
II	**Industry**	**349,497**	**872,044.90**	**25,449**	**2,096,122.07**	**374,946**	**2,968,166.97**
1	*Manufacturing*	215,307	499,010.33	17,481	787,968.11	232,788	1,286,978.45
2	*Construction*	108,883	185,942.81	5,426	238,163.79	114,309	424,106.60
3	*Electricity, Gas & Water companies*	13,619	149,212.50	1,821	1,018,950.75	15,440	1,168,163.24
4	*Mining & Quarrying*	11,688	37,879.26	721	51,039.42	12,409	88,918.68
III	**Services**	**704,962**	**893,712.63**	**36,233**	**1,359,385.93**	**741,195**	**2,253,098.57**
1	*Business Services*	329,016	337,071.42	10,802	493,914.86	339,818	830,986.27
2	*Trading*	156,496	182,298.44	6,528	102,202.94	163,024	284,501.37
3	*Real Estate and Renting*	75,738	73,308.37	4,089	34,666.81	79,827	107,975.19
4	*Community, personal & Social Services*	65,948	79,540.92	3,893	130,905.20	69,841	210,446.12
5	*Finance*	41,656	163,337.73	9,266	305,589.12	50,922	468,926.85
6	*Transport, storage and communications*	35,336	55,660.11	1,510	246,066.67	36,846	301,726.78
7	*Insurance*	772	2,495.64	145	46,040.34	917	48,535.98
IV	**Others**	**18,335**	**34,890.81**	**1,981**	**118,417.14**	**20,316**	**153,307.95**
	Total	**1,102,730**	**1,820,600.18**	**66,573**	**3,607,451.55**	**1,169,303**	**5,428,051.73**

Table 4. Number of College per Lakh Population(18-23 YEARS), Average Enrolment per College

Sl. No.	State/UTs	No. of College	College per lakh population	Average Enrolment per College
1	2	3	4	5
1	Andaman and Nicobar Islands	7	14	928
2	Andhra Pradesh	2624	48	493
3	Arunachal Pradesh	30	19	810
4	Assam	512	14	983
5	Bihar	770	7	1686
6	Chandigarh	25	13	2052
7	Chhattisgarh	741	24	550
8	Dadra and Nagar Haveli	8	13	690
9	Daman and Diu	9	15	336
10	Delhi	178	8	1531
11	Goa	56	32	640
12	Gujarat	2196	30	519
13	Haryana	964	30	611
14	Himachal Pradesh	327	45	553
15	Jammu and Kashmir	297	23	720
16	Jharkhand	309	8	1786
17	Karnataka	3593	51	416
18	Kerala	1306	44	554
19	Lakshadweep	0	0	0
20	Madhya Pradesh	2124	24	646
21	Maharashtra	4314	33	678
22	Manipur	87	26	1156
23	Meghalaya	60	18	1087
24	Mizoram	30	23	612
25	Nagaland	66	27	484
26	Odisha	1042	23	685
27	Puducherry	76	47	569
28	Punjab	1053	33	576
29	Rajasthan	2957	33	526
30	Sikkim	17	22	737
31	Tamil Nadu	2472	35	919
32	Telangana	2045	51	558
33	Tripura	52	12	1156
34	Uttar Pradesh	6922	28	816
35	Uttarakhand	440	37	621
36	West Bengal	1341	12	1170
	All India	**39050**	**28**	**698**

Table 1. State & Type - wise Number of Universities

Sl. No.	State/UTs	Central University	Central Open University	Institute of National Importance	State Public University	Institute under State Legislature Act	State Open University	State Private University	State Private Open University	Deemed University-Government	Deemed University-Government Aided	Deemed University-Private	Grand Total
1	*1*	*2*	*3*	*4*	*5*	*6*	*7*	*8*	*9*	*10*	*11*	*12*	*13*
1	**Andhra Pradesh**			6	21	1		1		1		4	**34**
2	**Arunachal Pradesh**	1		1				5	1	1			**9**
3	**Assam**	2		3	10		1	5					**21**
4	**Bihar**	4		3	13	1	1	1		1			**24**
5	**Chandigarh**			1	1					1			**3**
6	**Chhattisgarh**	1		2	12		1	8					**24**
7	**Delhi**	4	1	5	7					8	1	1	**27**
8	**Goa**			2	1								**3**
9	**Gujarat**	1		3	27		1	31			1	1	**65**
10	**Haryana**	1		2	14			18		2		3	**40**
11	**Himachal Pradesh**	1		3	4			17					**25**
12	**Jammu and Kashmir**	2		2	9	1							**14**
13	**Jharkhand**	1		2	8			8		1		1	**21**
14	**Karnataka**	1		3	26		1	14		4		11	**60**
15	**Kerala**	1		5	13					2		1	**22**
16	**Madhya Pradesh**	2		7	19		1	22		1			**52**
17	**Maharashtra**	1		5	22		1	4		7	2	12	**54**
18	**Manipur**	2		2	1								**5**
19	**Meghalaya**	1		1				6					**8**
20	**Mizoram**	1		1				1					**3**
21	**Nagaland**	1		1				3					**5**
22	**Odisha**	1		4	14		1	3				2	**25**
23	**Puducherry**	1		2								1	**4**
24	**Punjab**	1		4	9			15		1		1	**31**
25	**Rajasthan**	1		4	22		1	43				8	**79**
26	**Sikkim**	1		1				5					**7**
27	**Tamil Nadu**	2		7	20		1				2	26	**58**
28	**Telangana**	3		2	15	1	1					2	**24**
29	**Tripura**	1		1	1			1					**4**
30	**Uttar Pradesh**	4		7	27	1	1	27		2	3	4	**76**
31	**Uttarakhand**	1		3	10		1	15		1	1	1	**33**
32	**West Bengal**	1		6	25		1	9				1	**43**
	All India	**45**	**1**	**101**	**351**	**5**	**14**	**262**	**1**	**33**	**10**	**80**	**903**

In UTs of, Andaman & Nicobar Islands, Dadra & Nagar Haveli, Daman & Diu and Lakshadweep, there is no University.

INDIA	HIGHER EDUCATION STATISTICS AT A GLANCE						
			2011-12	2012-13	2013-14	2014-15	2015-16
1	Number of Universities		642	667	723	760	799
2	Number of Colleges		34,852	35,525	36,634	38,498	39,071
3	Number of Stand Alone Institutions		11,157	11,565	11,664	12,276	11,923
4	Enrolment in Higher Education	Total	291,84,331	301,52,417	323,36,234	342,11,637	345,84,781
		Male	161,73,473	166,17,294	174,95,394	184,88,619	185,94,723
		Female	130,10,858	135,35,123	148,40,840	157,23,018	159,90,058
		% Female	45%	45%	46%	46%	46%
5	Gross Enrolment Ratio (GER)	All Categories	20.8	21.5	23	24.3	24.5
		Male	22.1	22.7	23.9	25.3	25.4
		Female	19.4	20.1	22	23.2	23.5
		SC	14.9	16	17.1	19.1	19.9
		Male	15.8	16.9	17.7	20.0	20.8
		Female	13.9	15	16.4	18.2	19.0
		ST	11.0	11.1	11.3	13.7	14.2
		Male	12.4	12.4	12.5	15.2	15.6
		Female	9.7	9.8	10.2	12.3	12.9
6	Gender Parity Index (GPI)	All Categories	0.9	0.89	0.92	0.92	0.92
		SC	0.9	0.89	0.92	0.91	0.91
		ST	0.8	0.79	0.81	0.81	0.83
7	Enrolment in University & Constituent Units	Total	55,16,290	58,43,660	63,79,598	63,87,255	66,89,196
		Male	33,22,465	34,69,403	36,63,647	36,68,840	37,98,089
		Female	21,93,825	23,74,257	27,15,951	27,18,415	28,91,107
8	Number of Teachers	Total	12,47,453	13,08,571	13,67,535	14,73,255	15,18,813
		Male	7,61,104	7,97,626	8,34,160	9,04,046	9,24,965
		Female	4,86,349	5,10,945	5,33,375	5,69,209	5,93,848
		SC	86,380	87,281	94,802	1,04,654	1,13,295
		Male	56,676	56,867	62,142	69,041	74,399
		Female	29,704	30,414	32,660	35,613	38,896
		ST	25,114	25,951	27,460	31,501	32,174
		Male	15,579	15,901	16,981	19,586	19,872
		Female	9,535	10,050	10,479	11,915	12,302
		Professor & Equivalent	1,02,738	1,20,156	1,25,338	1,36,966	1,46,021
		Male	76,133	88,543	93,334	1,02,822	1,08,277
		Female	26,605	31,613	32,004	34,144	37,744
		Reader & Associate Professor	1,74,265	1,76,402	1,82,681	1,77,599	1,74,657
		Male	1,15,391	1,16,817	1,19,671	1,16,319	1,13,830
		Female	58,874	59,585	63,010	61,280	60,827
		Lecturer/ Assistant Professor	8,52,894	8,77,556	9,12,178	9,85,085	10,09,196
		Male	5,12,142	5,26,755	5,48,752	5,99,593	6,12,615
		Female	3,40,752	3,50,801	3,63,426	3,85,492	3,96,581
		Demonstrator/ Tutor	49,164	54,608	58,546	71,657	76,933
		Male	21,151	23,046	25,433	30,238	30,645
		Female	28,013	31,562	33,113	41,419	46,288
		Temporary Teacher etc.	68,392	79,849	88,792	1,01,948	1,12,006
		Male	36,287	42,465	46,970	55,074	59,598
		Female	32,105	37,384	41,822	46,874	52,408

AISHE (http://aishe.gov.in)

CONTACT US

PROGILENCE Capability Development Pvt. Ltd.

910, DLF City Court, Sikanderpur,

Gurgaon, Haryana, INDIA 122002

Tel: +91 124 4147164-65

Email: info@progilence.com

Web: www.progilence.com