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National
Skill Development
Corporation

Human Resource and Skill Requirements in the
**Tourism, Travel,
Hospitality & Trade** Sector (2022)

– A Report



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Human Resource and Skill Requirements in the Tourism Industry

Study on mapping of human resource skill
gaps in India till 2022

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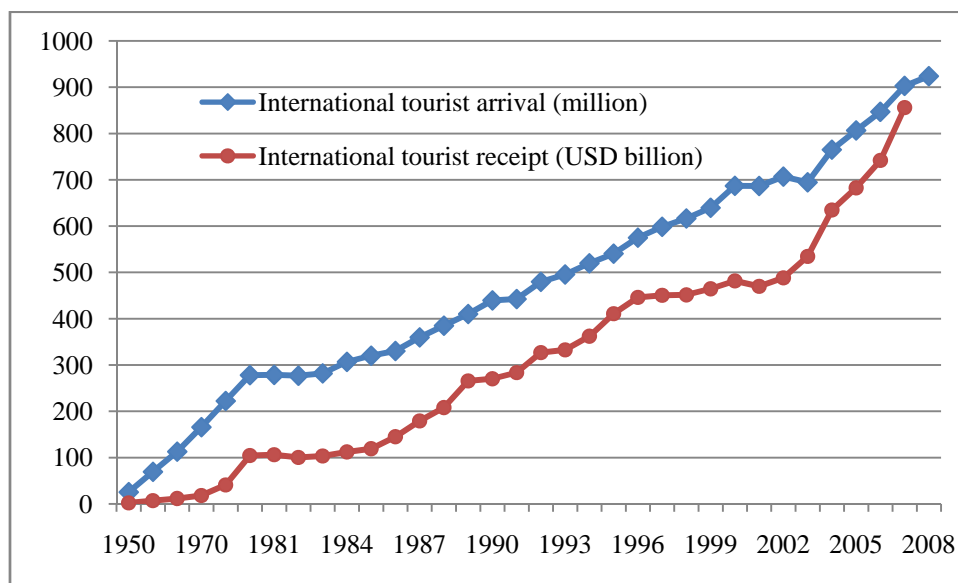
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1. Environment Scanning and Competitiveness of Tourism Industry

1.1. The Global Tourism Industry

World tourism enjoyed its fourth consecutive year of growth in 2008. International tourist arrivals grew by 2.3% in 2008 to reach a figure of over 924 million. This represented 21 million more arrivals than in 2007. The growth in international tourist arrival in 2008, 2.3%, is lower compared to 6.6% in 2007.

Figure 1: Inbound Tourism, 1950-2008

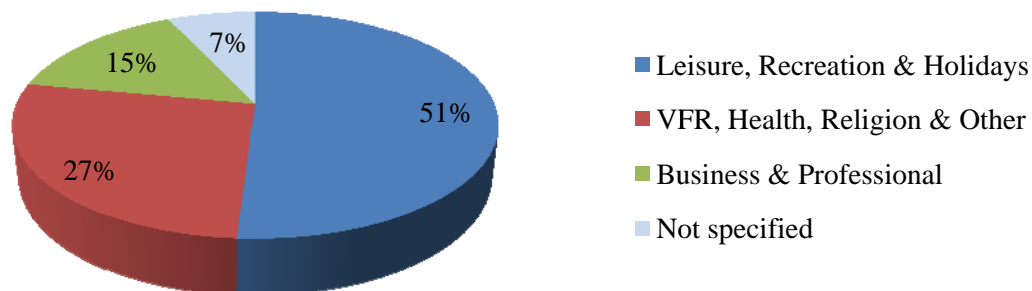


Source: UNWTO¹ - Tourism highlights 2008

In 2007, just over half of all international tourist arrivals were motivated by leisure, recreation and holidays (51% - 458 million). Business travel accounted for some 15% (138 million), and 27% represented travel for other purposes, such as visiting friends and relatives (VFR), religious reasons/pilgrimages, health treatment, etc. (240 million). The purpose of visit for the remaining 7% of arrivals was not specified.

¹ UNWTO – World Tourism Organization

Figure 2: Inbound Tourism by Purpose of Visit (% Share), 2007



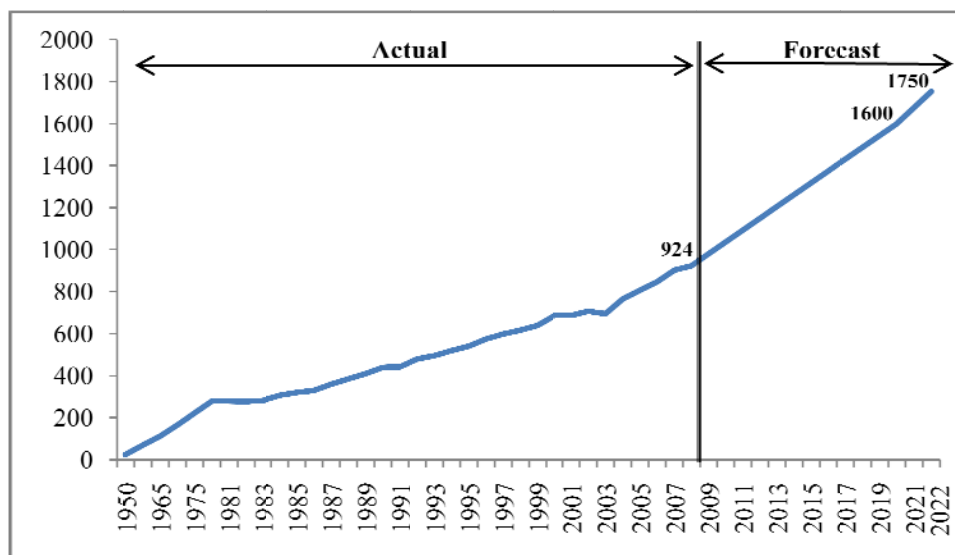
Source: UNWTO - Tourism highlights 2008

1.2. Global Tourism Industry Outlook

UNWTO’s Tourism 2020 Vision forecasts that international tourist arrivals are expected to reach nearly 1.6 billion by the year 2020. Of these worldwide arrivals in 2020, 1.2 billion will be intra-regional and 378 million will be long-haul travellers.

Based on the long term growth pattern, IMaCS estimates the international tourist arrival to cross 1.75 billion by 2022.

Figure 3: International Tourist Arrivals (in ‘000s), 1950-2022



Source: UNWTO; IMaCS analysis

The total tourist arrivals by region shows that by 2020 the top three receiving regions will be Europe (717 million tourists), East Asia and the Pacific (397 million) and Americas (282 million), followed by Africa, the Middle East and South Asia.

East Asia and the Pacific, South Asia, the Middle East and Africa are forecasted to record growth at rates of over 5% per year, compared to the world average of 4.1%. The more mature regions, Europe and Americas, are anticipated to show lower than average growth rates. Europe will maintain the highest share of world arrivals, although there will be a decline from 60% in 1995 to 46% in 2020.

As per the World Travel and Tourism Council, the World Travel & Tourism (T&T) industry is expected to post US \$ 7,340 billion of economic activity, and this is forecasted to grow to US \$ 14,382 billion by 2019. It also estimates that T&T accounts for approximately 7.6% of global employment. At present there are 77.3 million T&T Direct Industry jobs and 219.8 million jobs in the T&T Economy (including indirect), and these will rise to 97.8 million T&T Direct Industry jobs and 275.7 million T&T Economy jobs by 2019.

Based on the long term growth rate, IMAcS estimates that the World Travel & Tourism industry to post US \$ 17,615 billion of economic activity by 2022.

Table 1: World Travel & Tourism Estimates and Forecasts – 2009-2022

Particulars	2009 US \$ Billion	2019 US \$ Billion	2022 US \$ Billion
Personal Travel & Tourism	2,990,470	5,574,780	6,720,077
Business Travel	745,085	1,375,690	1,653,541
Government Expenditures	404,183	709,336	839,719
Capital Investment	1,220,100	2,589,660	3,245,615
Visitor Exports	1,079,430	2,130,950	2,613,286
Other Exports	900,731	2,001,090	2,542,542
T&T Demand ²	7,339,990	14,381,500	17,614,779
Direct Industry GDP ³	1,870,080	3,396,430	4,062,295
T&T Economy GDP ⁴	5,473,830	10,478,000	12,731,352
Direct Industry Employment*	77,276	97,784	104,938
T&T Economy Employment*	219,810	275,688	295,073

Source: World Travel & Tourism Council; IMAcS analysis; *'000 jobs;

² Demand side aggregate of tourism activity in the economy

³ This is the explicitly defined Supply-side Industry contribution of T&T that can be compared one-for-one with the GDP and Employment contribution of other industries in the economy. Establishment in this category include traditional T&T providers such as airlines, hotels, car rental companies, etc

⁴ This is the upstream economy contribution which comes about from suppliers to the traditional T&T industry. Establishments in this category include fuel and catering companies, laundry services, accounting firms, etc

1.3. Tourism Industry in India

The T&T industry in India accounted for approximately 6% of GDP and 30.5 million jobs (including direct and indirect) in 2008. The Travel and Tourism Competitiveness Report 2009 brought out by World Economic Forum, ranks India as 11th in the Asia-Pacific region and 62nd overall in a list of 133 assessed countries in 2009, up three places since 2008. In terms of travel, India stands 9th in the index of relative cost of access (ticket taxes and airport charges) to international air transport services, having almost the lowest costs in the world.

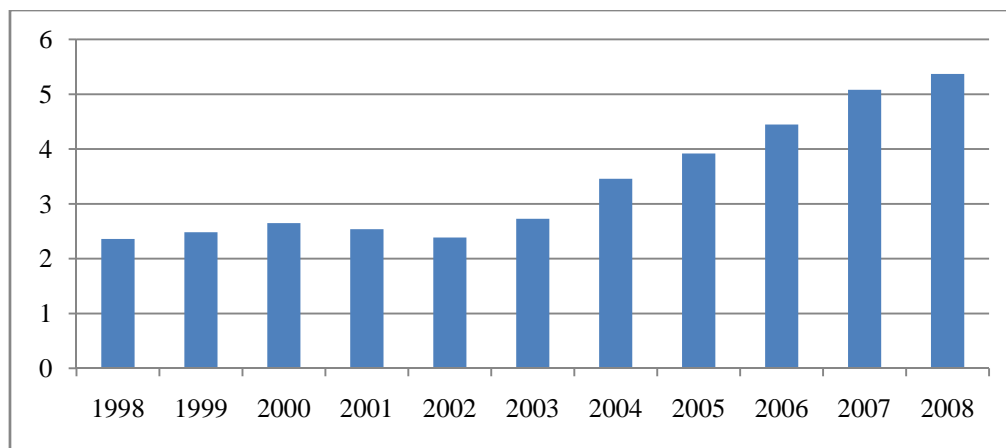
We will look at the three broad categories to understand the tourist traffic in India

- International tourist arrival in India
- Outbound tourism from India
- Domestic tourist traffic in India.

1.3.1. International Tourist Arrival in India

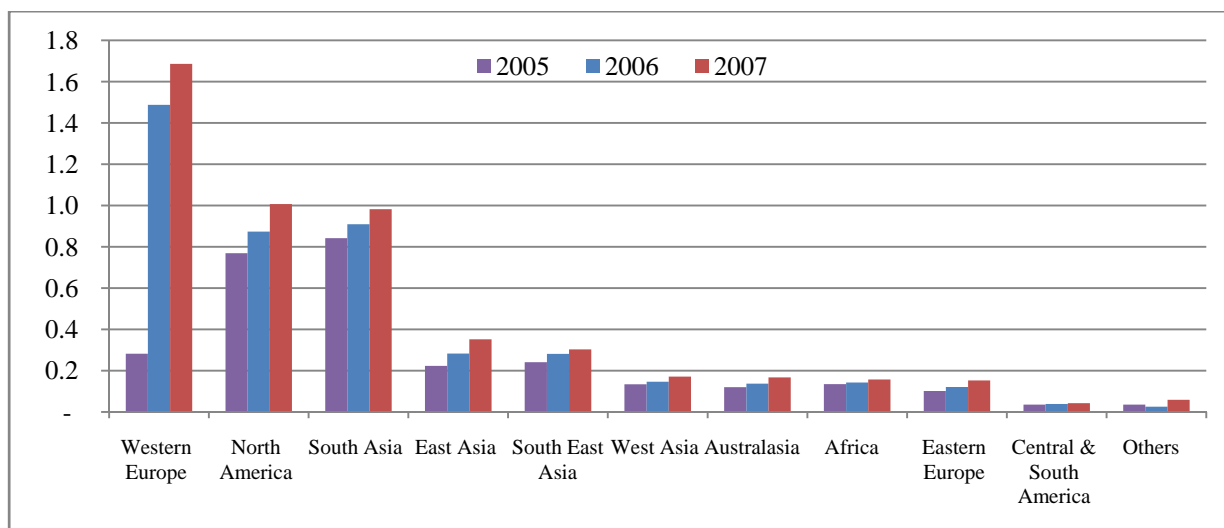
Tourism is one of the largest net earners of foreign exchange for the country recording earnings of US \$11,747 million in 2008, a growth of 9.5% YoY, according to the Ministry of Tourism. The International Tourist Arrival (FTA) has increased from 2.4 million in 1998 to 5.37 million in 2008. FTA registered a growth of 5.6% in 2008 over 2007.

Figure 4: Foreign Tourist Arrival in India (million), 1998-2008



Source: Ministry of Tourism, Government of India

Figure 5: Foreign Tourist Arrival (FTA) in India from Different Regions (in million)

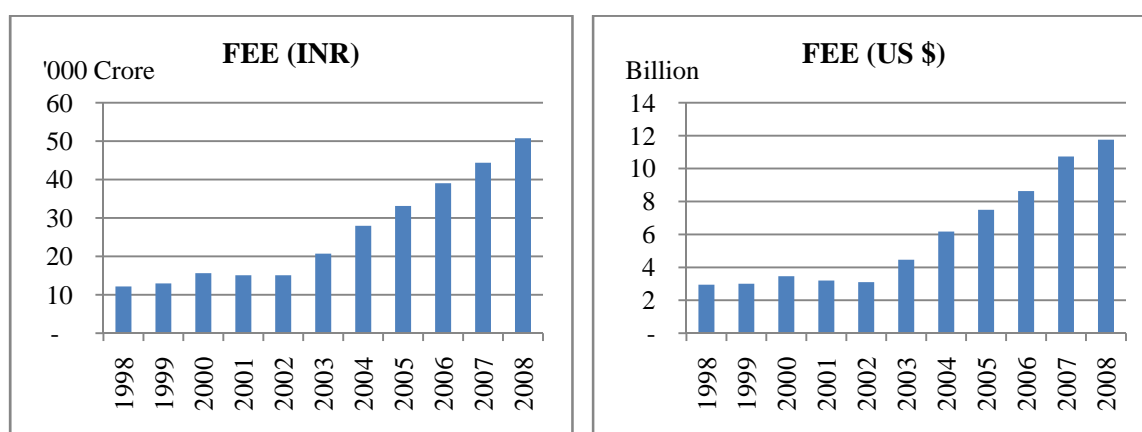


Source: Indian Tourism Statistics, 2007 – Ministry of Tourism, Government of India

FTAs in India from different regions of the world during last three years are depicted in the above figure. It is clear that the FTAs in India have been increasing from all regions during the last three years. The FTAs in India in 2007 were the highest from Western Europe (33.2%) followed by North America (19.8%), South Asia (19.3%), East Asia (6.9%), South East Asia (6%).

The Foreign Exchange Earnings (FEE) from tourism in India in 2008 were Rs.50,730 crore. In US \$ terms it was US \$ 11.75 billion. The FEE from tourism grew by 9.5% in US \$ terms, and by 14.4% in Indian Rupee (INR) terms in 2008 as compared to 2007.

Figure 6: Foreign Exchange Earnings (FEE), INR & US \$



Source: Indian Tourism Statistics, 2007 – Ministry of Tourism, Government of India

Top 10 States/UTs to attract international tourist in India in 2007 and their percentage share of total international tourist visits is provided in the table below.

Table 2: Top 10 States/UTs of India in Number of International Tourist Visit

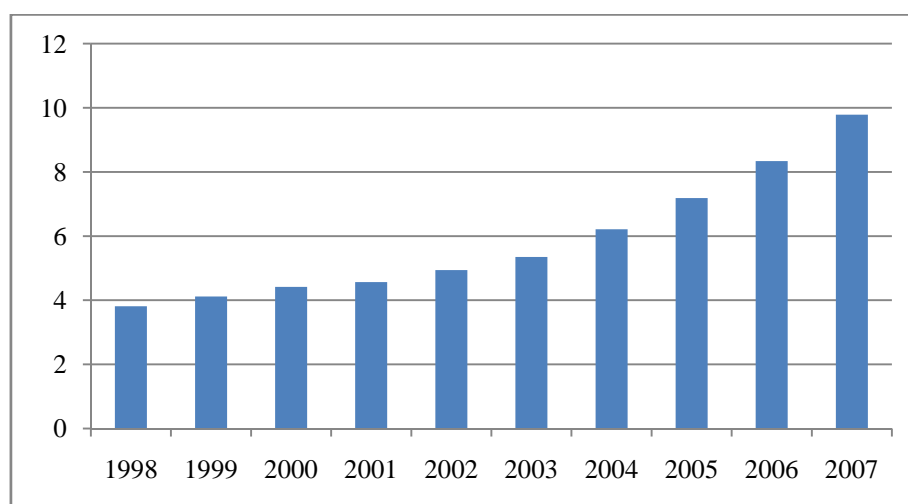
S. No.	State	% share
1	Delhi	15.3
2	Maharashtra	14.6
3	Tamil Nadu	12.9
4	Uttar Pradesh	11.3
5	Rajasthan	10.6
6	West Bengal	8.8
7	Andhra Pradesh	5.9
8	Karnataka	4.1
9	Kerala	3.9
10	Goa	3.0
Total of Top 10 States/UTs		90.4

Source: Ministry of Tourism, Government of India

1.3.2. Outbound Tourism

The number of outbound Indians has been consistently rising over the last ten years. It increased from 3.8 million in 1998, to 9.8 million in 2007 with a compound annual growth rate of 11 %.

Figure 7: Number of Outbound Indians (millions), 1998-2007

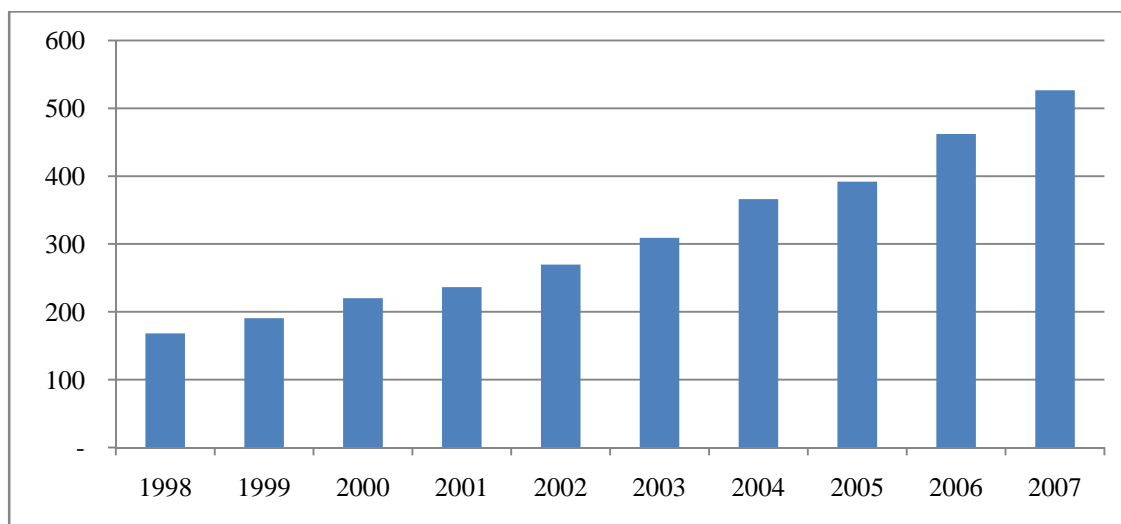


Source: Indian Tourism Statistics, 2007 – Ministry of Tourism, Government of India

1.3.3. Domestic Tourist Traffic in India

The domestic tourist visits to all States/UTs have risen from 168.2 million in 1998 to 526.6 million in 2007 at a compounded annual growth rate of 13.5%.

Figure 8: Number of Domestic Tourist Visits to All States/UTs (millions), 1998-2007



Source: Indian Tourism Statistics, 2007 – Ministry of Tourism, Government of India

Top 10 States/UTs to attract domestic tourist in India in 2007 and their percentage share of total domestic tourist visits is provided in the table below.

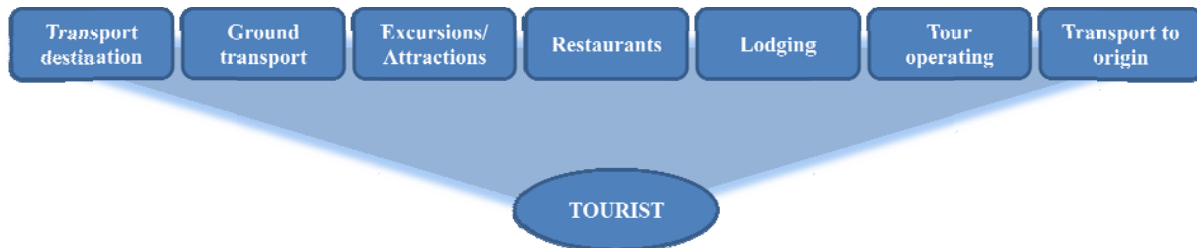
Table 3: Top 10 States/UTs of India in Number of Domestic Tourist Visit

S. No.	State	% share
1	Andhra Pradesh	24.3
2	Uttar Pradesh	22.1
3	Tamil Nadu	13.5
4	Rajasthan	7.2
5	Karnataka	4.9
6	Uttarakhand	3.8
7	Maharashtra	3.7
8	West Bengal	3.5
9	Madhya Pradesh	2.6
10	Gujarat	2.6
Total of Top 10 States/UTs		88.2

Source: Ministry of Tourism, Government of India

There are numerous stakeholders involved in the tourism industry. Understanding the tourism supply chain is the key to understand these effects.

Figure 9: Tourism Supply Chain



Source: IMaCS analysis

The supply chain begins with the tourist being transported to the destination. Upon reaching the destination, the tourist uses various means of transport (car, air, rail, bus, etc.) to visit various destinations/attractions. Restaurants and hotels cater to the accommodation and other needs of the tourist. Tour operators provide services which includes ticket booking, site seeing, foreign exchange conversion, etc. The supply chain ends with the tourist being transported back to its origin.

Apart from the direct effects, any single transaction extends beyond its direct effects and has significant indirect impact on other segments.

1.4. Forms of Tourism in India

There are various forms of tourism which have emerged in India. Some of them are discussed below:

- **Heritage tourism** – India is a land of deep rooted heritage and history dating back to many thousand years. There are number of ancient heritage monuments, forts and palaces which provides significant potential of heritage tourism in India. India is also home to Taj Mahal, one of the seven wonders of the world.
- **Wildlife tourism** – India is home to some of the finest wildlife sanctuaries and reserves such as Ranthambore, Bandhavgarh and Kanha National Parks, Bharatpur, Ranganathittu and Vembanad Bird Sanctuaries.
- **Ecotourism** – Ecotourism yet to make its mark in India, though it has immense potential to develop it as the “ecotourism” hub. Places of interest include Ladakh, Andaman & Nicobar Islands, Rishikesh, Siju & Edakkal caves, etc. among many others.

- **Adventure tourism** – India offers a wide range of adventure sports for tourists. Trekking and skiing in the Himalayas, white water rafting on the Ganges and Beas, camel and jeep safaris in the deserts of Rajasthan, paragliding in Himachal, water sports in Goa and scuba diving in Lakshadweep and Andaman & Nicobar are just some of the options available for adventure tourists.
- **Rural tourism** – In the developed countries, a new style of tourism of visiting village settings to experience and live a relaxed and healthy lifestyle has already emerged and India is also following the suit to some extent. In this view, 31 villages across India have been earmarked for development, and the Ministry of Tourism is working with local committees to develop tourism. The Ministry of Tourism is expected to develop institutional mechanisms for supporting, promoting and organising large numbers of fairs, festivals and craft bazaars in rural areas, which will provide exposure and recognition, as well as an additional flow of income to local artisans.
- **MICE (business) tourism** – With the expansion in the network of airlines operation on the domestic routes, better tourist surface transport systems including the Indian Railways, new centres of information technology, many new convention centres, hotels and meeting facilities, India is now an important MICE (Meetings, Incentives, Conferences & Exhibitions) destination. The Indian sub-continent is emerging as one of the finest Incentive destinations in the world owing to the diverse culture and geography.
- **Medical tourism** – Medical tourism is promoted through suitable packaging of identified best hospitals and price banding for various specific treatments. India offers all kinds of medical and health related treatments at around one-fifth the cost in European countries or the USA. As health care costs skyrocket, patients in the developed world are looking overseas for medical treatment. India is capitalising on its low costs and highly trained doctors to appeal to these medical tourists. India is now emerging as one of the hot destinations for medical tourism besides Singapore, Thailand, Hong Kong, Malaysia, Philippines, Columbia, Costa Rica and UAE among other destinations. Players are looking to tap this opportunity, and hotels and resorts in the South, especially in Kerala and some in UP, have been cashing in on the trend. In 2007, Indian hospitals treated 450,000 patients from other countries against the highest 1.2 million in Thailand. According to the study conducted by the Confederation of Indian Industry (CII), foreign patients are visiting India with an increasing rate of 15% annually. The same study also estimates that medical tourism can contribute up to Rs. 100

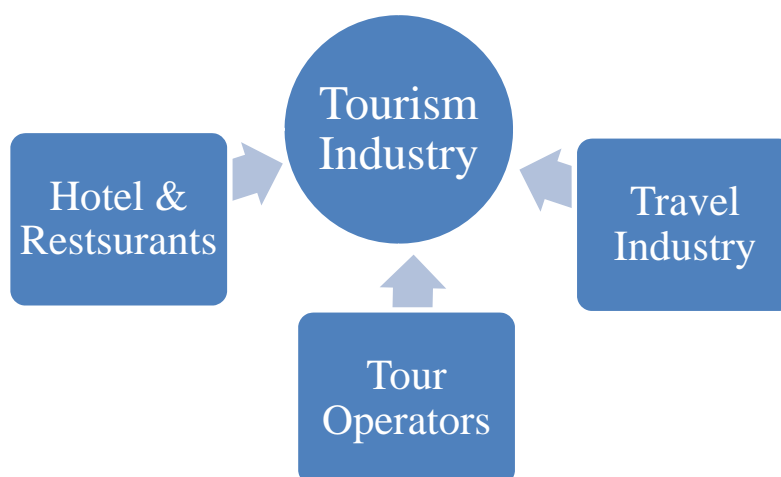
billion (US \$ 2-2.5 billion) in revenue by 2012, and account for 3-5 % of the total healthcare delivery market.

- **Buddhist circuit** – There are various popular Buddhist tourist places in India, such as Bodhgaya, Rajgir, Nalanda, Patna, Vaishali, Kushinagar, Sarnath, etc. which attracts significant tourists round the year.
- **Religious tourism** – India has a host of religious places stretching from Kashmir to Kanyakumari. This spawns religious tourism. Illustratively, important destinations include Tirupati, Madurai, Rameswaram, Varnasi, Dwaraka, Amarnath, Badrinath and Kedarnath, to name a few.

1.5. Sub-segments of tourism industry

The tourism industry in India can be categorised under three major sub segments as depicted below:

Figure 10: Sub-segments of Tourism Industry



We will cover hotels & restaurants and tour operators in further detail in this report. Travel industry is being covered in Transport and Logistics section of the report.

1.5.1. Hotels and Restaurants

1.5.1.1. Overview

The Hotel & Restaurants Industry has contributed between 1.2% and 1.5% of the GDP over the last seven to eight years. The Ministry of Tourism estimates that there are more than 8,700 hotels at 54

key locations across the country with a total room supply of about 174,000 including hotels in the classified, approved but not classified, and licensed by the state governments but not approved categories.

According to an estimate⁵, the Indian Hotels & Restaurant Industry is expected to be Rs. 827.76 billion in by 2009-10 growing at compounded annual growth rate of 11% over 2006-07 (Rs. 604.32 billion).

1.5.1.2. Major players

In the large/luxury hotels segment there are about 11 long-standing players such as ITC Hotels, Asian Hotels, The Oberoi Group of Hotels, Hotel Leela Ventures, ITDC, Indian Hotels, The Park Hotels and international players like Hilton Hotels, Marriott International, Le Meridien Hotels & Resorts, and Radisson Hotels & Resorts. There are about 16 listed hotel groups in the mid-segment including Bharat Hotels, Oriental Hotels, Nehru Place Hotels, Jaypee Hotels, Piem Hotels and Taj GVK Hotels.

In addition, there are more than 90 listed hotels and resorts in the small/mid sized segment including Country Club, EIH Associate Hotels, Kamat Hotels and Mahindra Holidays and Resorts. Apart from these, as mentioned earlier, there are a number of guest houses and hotels, particularly in the budget and small hotel segments, which are primarily run by localised players.

1.5.1.3. Hotel Industry Outlook

The hotel industry is presently undergoing rapid growth particularly in the luxury category. International hotel chains such as Six Continents, Carlson Hospitality and Marriott are looking to increase their capacity in India, one of the fastest growing hospitality markets across the globe. A host of mid-market and budget hotel brands like Accor are also chalking entry plans for the market.

Based on the study conducted by the Ministry of Tourism, the existing (2006) demand and supply of rooms per annum are presented in the table below.

⁵ Cygnus research report on Indian Hotel Industry – Oct-08

Table 4: Demand Supply Scenario for Hotel Rooms, 2006

Category	Supply		Demand		Shortage	
	54 key locations*	All India	54 key locations*	All India	54 key locations*	All India
Classified	84,259	133,744	99,140	157,365	14,881	23,621
Others	89,728	142,425	82,456	130,883		
Total	173,987	276,170	181,596	288,248	7,609	12,078

Source: Ministry of Tourism; *54 key locations identified all over the India as sample for the study

The same study also forecasts the estimated demand for hotel rooms per annum assuming that the past growth in tourist traffic will also continue in future. The same is presented below.

Table 5: All India Estimated Demand for Hotel Rooms – 2010 & 2015

Category	2010	2015
Classified	342,053	868,913
Others	240,680	515,095
Total	582,733	1,384,008

Source: Ministry of Tourism

In 2010, 58.7% of the total demand is estimated to be in the classified category and 53% of the total classified demand is estimated to be in the budget category and the rest in luxury category. In 2015, the share of classified category is estimated to increase to 62.7% with budget category's share decreasing to approximately 47%.

1.5.1.4. Emerging Trends

Some of the emerging trends of the Indian hotel industry are discussed below:

- **Service Apartments** - Service apartments are fully furnished and self-catering units combining the benefits of a home along with the facility such as house-keeping, room-service, 24-hour receptionists, security and travel desk. Besides this, they also contain other amenities such as 24-hour security, power backup, leisure activities, home appliances, refrigerator, self-help kitchen, laundry, telephone, high-speed internet connectivity, fire safety, private parking, health clubs with some of the apartments even offering value-add services for tourists and NRI groups such as site seeing and guided shopping for spouses. Service apartments are well equipped apartments specifically designed for experts with short stays in the country to give them and their family the comforts as well as the privacy of home. The boom in ITES and software businesses has acted as

a catalyst in the growth of all sorts of accommodation businesses along with serviced apartments. Service apartment also fulfills all kinds of short-term and long-term accommodation needs of individuals, corporate houses and MNCs with quality living.

- **Spas** - The need for solitude, space and peace to recharge oneself has played an important role in the growth of spas in the country. A spa offers relaxation and rejuvenation to its clients. Luxuries at the spas include facials, baths, body therapies through international procedures as well as Thai or Indian classics, body treatments, facials, massages, aroma therapy, hair removal, hydrotherapy, manicures and pedicures, customised packages to deal with specific problems, beauty advice and therapies and perfectly planned diets.
- **Budget hotels** - Budget hotels in India witnessed tremendous growth due to strong domestic travel and positive economic and investment environment. The minimum expectation of any budget traveller is a clean and comfortable room (air-conditioned) with a refrigerator, a 17 inch flat-screen television, tea and coffee makers at the bedside, in-house gym, cyber café, ATM machine, 24-hour automatic check-in kiosk and wi-fi facilities. This is the new definition that budget hotels have given to the hotel industry by satisfying the value for money concept.
- **Wildlife resorts** - The wildlife lodges segment has caught the attention of hospitality companies. For example, Taj Safaris, a JV between Taj Hotels and CC Africa, has opened two luxury wildlife resorts in Madhya Pradesh. Leisure Hotels is also targeting to enter the wildlife lodges segment with a lodge near Kanha National Park in Madhya Pradesh. CC Africa is planning to set up four new safari lodges in India—two in South India, one in Kaziranga (Assam) and another in Gir (Gujarat). These new lodges are expected to be fully operational by October 2011. Fortune Park Hotels, a subsidiary of ITC Ltd, is also one of the hospitality companies planning to enter the wildlife lodges segment. Some of the other high-end luxury wildlife lodges are the The Oberoi Vanyavilas and Aman-i-khas at Ranthambore. In the recent past, high-end luxury tourism has been promoted by the Ministry of Tourism and the growth in the high-end wildlife lodges is result of it.

1.5.2. Tour Operators

1.5.2.1. Overview

In order to encourage quality standards and services, the Ministry of Tourism approves travel agents, tour operators, tourist operators and adventure tour operators in the country to strict guidelines. As per the estimate of Ministry of Tourism, there are nearly 6,000 travel trade companies and firms comprising of tour operators, travel agents and tourist transporters.

1.5.2.1. Major players

The major organised players, besides plethora of organised players, in this category in India are:

Table 6: Key Organised Players in Tour Operators and Travel Agency Segment

S. No.	Name
1	Thomas Cook India Private Limited
2	Kuoni India Limited
3	Cox & Kings India Limited
4	Raj Travels & Tour Limited

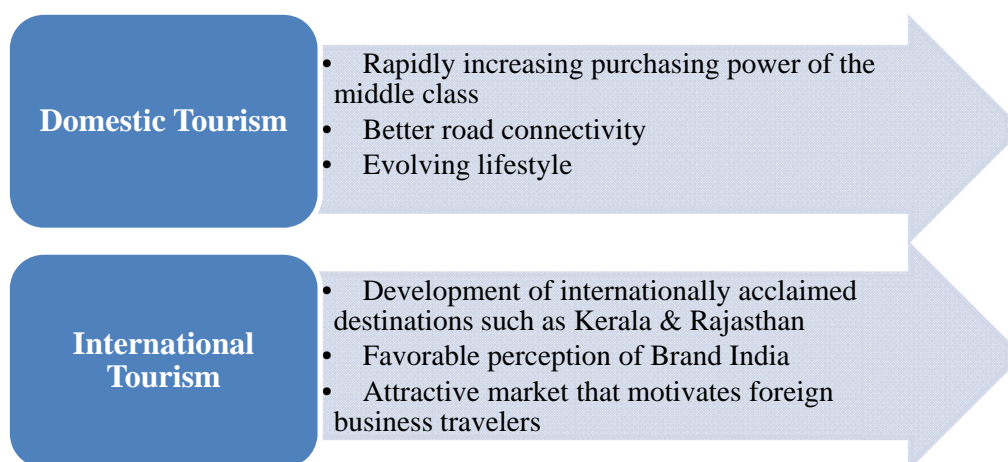
Source: IMAcS analysis

1.6. Demand Drivers, Success & Risk Factors

1.6.1. Demand Drivers

The rapid increase in tourism is being fuelled by a wide range of contributory factors. Some of the growth drivers are outlined below.

Figure 11: Tourism Segment and Growth Drivers



As seen above the growth in domestic tourism is driven by rising income levels and evolving lifestyle of the people. At the same time, the growth in international tourism is driven by business travel and international recognition of tourist attraction in India.

1.6.2. Success & Risk Factors

To take advantage of the potential tourist market, the following are key success factors for firms in the tourism industry:

- **Branding & Marketing** – Having the right tourism products is only one part of the equation. Branding the products and marketing the products to the right set of people are important factors to ensure the success of any tourism product. E.g., operators such as Cox and Kings and SOTC who have developed deep capabilities in these areas.
- **Networking and tie-ups** – Ability to network and develop tie-ups with various downstream service providers is also an important factor the success of any firm as it ensures consistent and reliable service to the customers (tourists). E.g., the case of Star Alliance in airlines.
- **Packaging** – Ability to provide an end-to-end services is also very important in tourism industry, more so in case of first time visitors who have less knowledge about the destination. Also as different people have different needs, it is important that the service provider offers focused offerings based on the need of the tourist. E.g., Rishikesh as a destination can be packaged as a religious tourist destination as well as an adventure tourist destination.

The tourism industry is exposed to the following risks:

- **Terrorism** – Terrorism is a major risk as it can wipe out a destination from the tourism map.
- **Global meltdown** – Global meltdown and fear of recession affects tourism activity negatively as tourists are less inclined to take trips and spend on leisure activities.
- **Pandemics** – Pandemics like H1N1 flu, SARS, etc. are also major risks to tourism.
- **Poor infrastructure** – Poor infrastructure such as sub-standard airports, inadequate hotel and room supply, etc. are also major risk as it can deter tourist from visiting a particular destination.
- **Rising cost** – Rising costs such as that of the fuel, which will have a spiralling effect on various activities in the value chain, also poses a risk to tourism as it may make the product unaffordable to certain segments of tourists.

1.7.India's Position in the World

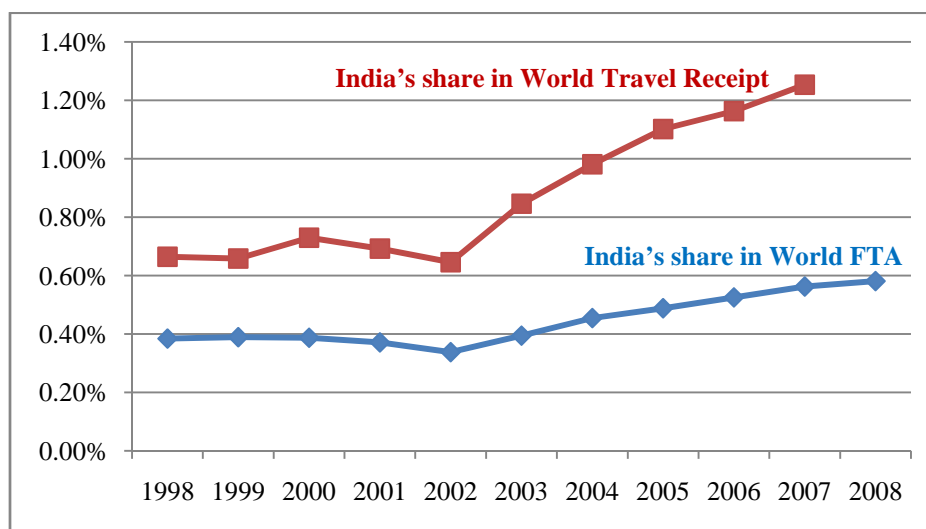
India's share in international tourist arrival as well as rank has improved over the last 10 years. Both have significantly improved since 2002.

Table 7: Foreign Tourist Arrival (FTA) in World & India and India's Rank

Year	World FTA	India FTA	India's Rank
1998	614.3	2.36	47 th
1999	637.4	2.48	46 th
2000	684.7	2.65	50 th
2001	684.4	2.54	51 st
2002	704.7	2.38	54 th
2003	692.2	2.73	51 st
2004	761.4	3.46	44 th
2005	803.0	3.92	43 rd
2006	847.0	4.45	44 th
2007	903.0	5.08	42 nd
2008	924.0	5.37	-

Source: UNWTO; Ministry of Tourism, India

Figure 12: India's Share in World Travel Receipt & World FTA, 1998-2008



Source: UNWTO; Ministry of Tourism, India

World travel receipts have increased from US \$ 444.1 billion in 1998 to US \$ 856.0 billion in 2007 at a compounded annual growth rate of 7.6%. At the same time the travel receipt (foreign) in India has risen from US \$ 2.95 billion in 1998 to US \$ 10.73 billion at a compounded annual growth rate of 15.4%.

While the growth in tourism has been impressive, India's share in total global tourism arrivals and earning is quite insignificant and is expected to improve in the next decade.

1.8.Indian Tourism Industry Outlook

Indian tourism industry has expanded rapidly over the past few years and is well poised to grow at faster pace in the coming years underpinned by the government support, rising income level and various international sports events. Government of India's 'Incredible India' campaign launched in 2002 has also been quite successful.

The World Travel & Tourism Council estimates that the Indian Travel & Tourism (T&T) industry will post Rs 4,412.7 billion (US \$ 91.7 billion) of economic activity in 2009, growing to Rs. 14,601.7 billion (US \$ 266.1 billion) by 2019 registering a nominal compounded annual growth of 12.7%. It also expects the Indian T&T industry to grow at 7.7% per annum in real terms between 2009 & 2019.

Based on the long term growth rate, IMaCS estimates that the India Travel & Tourism (T&T) industry to post Rs. 21,011 billion of economic activity by 2022.

2. Human Resource and Skill Requirements in the Tourism Industry

2.1. Employment Pattern

As per the Planning Commission an investment of Rs.10 lakh creates 78 jobs in the Tourism sector while the same generates just 18 jobs in the Manufacturing and 45 in the Agriculture sector. Currently Travel & Tourism, being employment intensive, provides employment to approximately 31 million (both direct & indirect) people throughout the country and is one of the largest employers in the country, this number is expected to rise to over 40 million by 2019 and over 43 million by 2022. The skill requirements and skill gaps are presented for the following major segments driving employment in the Tourism Industry:

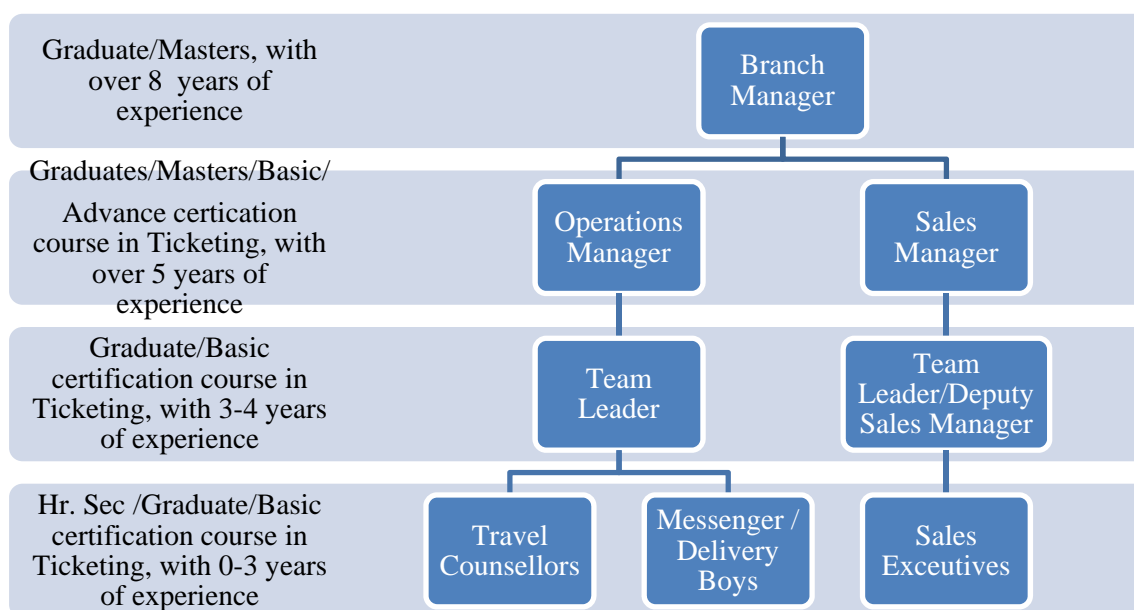
- Travel and Tour Operators
- Hotels and Restaurants.

2.2. Skill Requirements and Gaps in Travel and Tour Operators Segment

The skill requirements in the Travel and Tour Operator segments are elaborated in this section.

The following figure details the profile of persons employed in the Travel and Tour Operators.

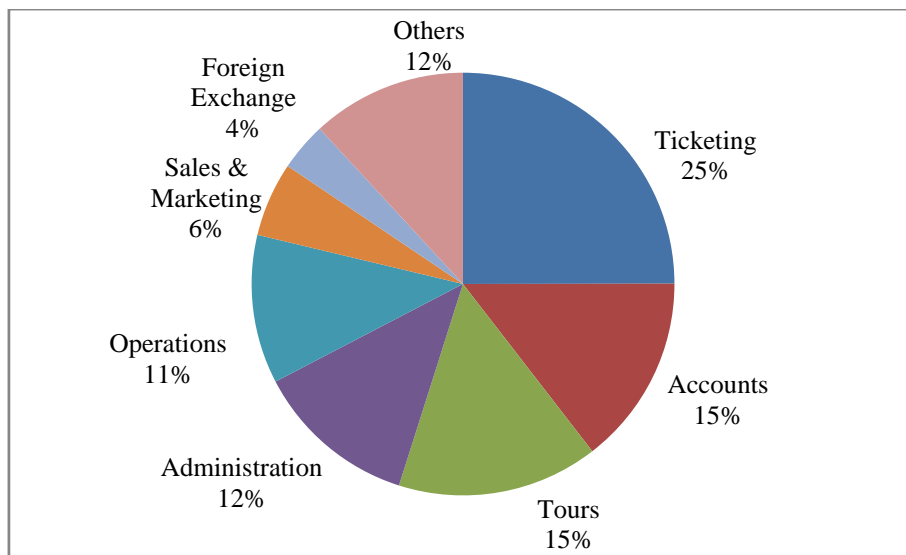
Figure 13: Profile of persons employed in Travel and Tour Operators Segment



Source: Primary Research and IMAcS analysis

Apart from this, certain companies might have a separate Passport/Visa and Foreign Exchange divisions too. The profile of the people in the department will be same as that of Travel Counsellors. There are companies who outsource the Passport/Visa related works.

Figure 14: Function-wise distribution of Human Resource in Travel and Tour Operators Segment



Source: Ministry of Tourism, IMACS analysis

The education-wise distribution of workforce is provided in the Table below:

Table 8: Education-wise distribution of Human Resource in Travel and Tour Operator Segment

Education Level	% of people	Functional area assigned
MBA, CA, CS, ICWA	3% - 5%	Management level as Branch Manager or Divisional Manger
Post Graduates/Graduates	25% - 35%	Ticketing (Travel Counsellors), Marketing and Sales, Accounts/Finance department, Foreign Exchange etc
Diploma /Certificate course	42% - 45%	Ticketing, Executives/Assistants in various departments
High School and below	15% - 30%	Ticketing, Messenger/Delivery boys
Total	100%	

Source: Primary Research and IMACS analysis

2.2.1. Skill Requirements and Skill Gaps in Travel and Tour Operators Segment

The following table presents the skill requirements and gaps across various functions and hierarchical/reporting 'levels' in Travel and Tour operators segment.

Table 9: Skill Requirements and Skill Gaps Common to Travel and Tour Operators

Function	Level	Skills required	Skill gaps
Operations	Branch Manager	<ul style="list-style-type: none"> ▪ Responsible for operation of the branch. ▪ Ability to build relationship with the clients, especially institutional. ▪ Ensure all the customer complaints are efficiently handled. ▪ Ability to promote various travel and tour products of the company. ▪ Finalising tour itineraries. ▪ Establishing tie up with various downstream service providers. ▪ Ability to liaison with airline, hotels and local community. ▪ Leadership qualities. ▪ Ability to provide on the job training to the staff. ▪ Rotation of staff and deciding their roles and responsibilities. ▪ Hiring of staff depending upon the requirement. ▪ Excellent communication skills. ▪ Being presentable (as the role is customer facing and involves hospitality). 	<ul style="list-style-type: none"> ▪ Inadequate ability to handle customers (Individual and/or Corporate) with wide range of needs. ▪ Inadequate ability to handle complaints ▪ Lack of adequate IATA-qualified personnel
Operations	Operations	<ul style="list-style-type: none"> ▪ Ability to oversee specific 	<ul style="list-style-type: none"> ▪ Inability to handle the

Function	Level	Skills required	Skill gaps
	Manager	<p>functions such as ticketing and passport.</p> <ul style="list-style-type: none"> ▪ Ability to check the quality of the work of Travel Counsellors as a monitoring mechanism. ▪ Ability to resolve the issues faced by Travel Counsellors. ▪ Ability to resolve the issues faced by the clients, which have been identified through the service calls given to the clients on a regular basis. ▪ Ability to monitor pricing, ticketing and invoicing. ▪ Ability to suggest ways to streamline the processes to ensure excellent service. ▪ Ability to review processes and procedures to ensure maximum efficiency. ▪ Ability to use the knowledge of ticketing, that he/she has gained over experience and/or thorough the courses (from IATA, UFTA, etc.) that he/she has done. 	<p>situation during the crises time – such as change in tickets, sudden changes in travel schedules.</p> <ul style="list-style-type: none"> ▪ Insufficient knowledge of ticketing ▪ Lack of adequate presentation skills. ▪ Insufficient people management skills. ▪ Inadequate time management skills.
	Team Leader	<ul style="list-style-type: none"> ▪ Need to ensure that the tickets, visa, etc. are issued correctly and promptly by the team. ▪ Ability to act as a solution provider for the team members when they are 	<p>The following skills are inadequate:</p> <ul style="list-style-type: none"> ▪ Time management ▪ People management ▪ Client handling

Function	Level	Skills required	Skill gaps
		<p>unable to handle a situation.</p> <ul style="list-style-type: none"> ▪ Knowledge on various aspects of ticketing. ▪ Supervisory skill ▪ Time management 	
	Travel Counsellors	<ul style="list-style-type: none"> ▪ Ability to understand the needs of the customer and act as their travel advisor. ▪ Ability to effectively interact with customers and prospects and convert enquiries to sales. ▪ Knowledge on various travel routes both domestic and international. ▪ Ability to work in Central Registration System (CRS) for booking, cancelling, splitting, reissue of tickets etc. ▪ Knowledge on refunding norms in case of partly utilised tickets. ▪ Knowledge on various formalities (passport, visa etc.) that the customer needs to comply with in case of outbound travels. ▪ Ability to calculate the ticket fare - should know their components (such as surcharge, service tax, etc.). ▪ Adequate knowledge of hotels available at various locations in order to execute hotel bookings. 	<ul style="list-style-type: none"> ▪ Lack of adequate geographical knowledge (especially in case of international travels) leading to higher turnaround time. ▪ Need for better time management ▪ Lack of adequate procedural knowledge on Passports and Visas. ▪ Need for adequate levels of politeness while handling calls. ▪ Lack of knowledge of client focussed/ customised products. ▪ Inability to maintain a cordial relationship with the corporate clients, leading to misunderstanding.

Function	Level	Skills required	Skill gaps
		<ul style="list-style-type: none"> ▪ Proper follow up with the customers once the tickets are booked and to record their feedback. ▪ Need to be proactive and smart, especially the travel counsellors holding positions at Unique Selling Points (USP) - locations at customer premises. 	
	Messenger / Delivery boys	<ul style="list-style-type: none"> ▪ Housekeeping ▪ Ability to interact with customers at the time of collecting travel related documents / delivery of tickets / returning the documents. ▪ Ability to interact with airline personnel while meeting them for getting endorsement. ▪ Ability to interact with officials in passport and visa office, for document submission and other procedures. ▪ Safe and on time delivery. 	<ul style="list-style-type: none"> ▪ Lack of communication skill ▪ Inadequate behavioural skills – such as being polite, etc.
Sales	Sales Manager	<ul style="list-style-type: none"> ▪ Ability to oversee the smooth running of the department. ▪ Flair for language. ▪ Ability to network with clients ▪ Studying the market to identify potential clients. ▪ Ability to build customised 	<ul style="list-style-type: none"> ▪ Inadequate presentation skills ▪ Inadequate client networking skills. ▪ Insufficient creativity in designing new products based on the customer requirement.

Function	Level	Skills required	Skill gaps
		<p>products for clients depending upon their requirements, making effective presentations, and winning the business.</p> <ul style="list-style-type: none"> ▪ Need to ensure that the expectations of customers are met. ▪ Need to motivate the team leaders and the sales team. ▪ Knowledge of a major CRS ▪ Ability to maximise the sales revenue. ▪ Recommending areas for staff training. 	
	Deputy Manager Sales/ Team leaders	<ul style="list-style-type: none"> ▪ Assisting sales staffs in solving general problems. ▪ Good communication skill. ▪ Knowledge of a major CRS – such as Abacus, Galileo, Saber, Amadeus ▪ Need to motivate the sales team. ▪ Meeting clients for feedback and understanding their requirements. ▪ Reviewing travel history to understand the customer requirements ▪ Carrying out market studies if need be. 	<ul style="list-style-type: none"> ▪ Inadequate communication skill ▪ Inadequate skills to identify potential clients. ▪ Problem solving ability ▪ Inadequate knowledge of CRS such as Abacus, Galileo, Saber, Amadeus.
	Sales Executives	<ul style="list-style-type: none"> ▪ Need to be self driven and result oriented. ▪ Adequate team skills 	<ul style="list-style-type: none"> ▪ Lack of adequate communication skills – ability to converse in

Function	Level	Skills required	Skill gaps
		<ul style="list-style-type: none"> ▪ Ability to conduct market studies. ▪ Ability to meet potential clients and interact with them, explaining the products offered. ▪ Good communication skills. 	<ul style="list-style-type: none"> English, offer travel solutions ▪ Inadequate skill to understand the client's requirements and respond accordingly. ▪ Inadequate attitude to work in a team.

Travel and Tour operators might or might not have their own guides. Their functions might be restricted to preparation of itinerary for tours, and booking hotels and tickets accordingly. Such operators may even outsource 'guiding' in case of international tours by having a tie up with a similar company abroad. A representative of the local tour operator (sometimes, even the Branch Manager) will act as an 'escort' while the representative from the company in abroad will be acting as a 'guide'. In case of domestic tourism, either the tourist prefers to visit places independently or a local guide will be hired/the tour operators will arrange for a guide to accompany the tourist. The guides in India are regulated by Government of India and they have to compulsorily obtain a license for functioning as a guide in any of the sites in India. The basic skill requirements and skill gaps are as follows:

Table 10: Skill Requirements and Skill Gaps for a Guide

Function	Level	Skills required	Skill gaps
Services	Meet and Greet People	<ul style="list-style-type: none"> ▪ Ability to interact with airport and ticket staff and coordinate travel ▪ High energy level ▪ Good Communication skills 	<ul style="list-style-type: none"> ▪ Inadequate energy level when interacting with customers.
	Guide	<ul style="list-style-type: none"> ▪ Good communication skills ▪ Ability to manage customers ▪ Verbal fluency and familiarity with languages ▪ Decision making skills ▪ Problem solving skills 	<ul style="list-style-type: none"> ▪ Inadequate communication skills ▪ Insufficient knowledge of tourist places. ▪ Inadequate skills of crises management and time

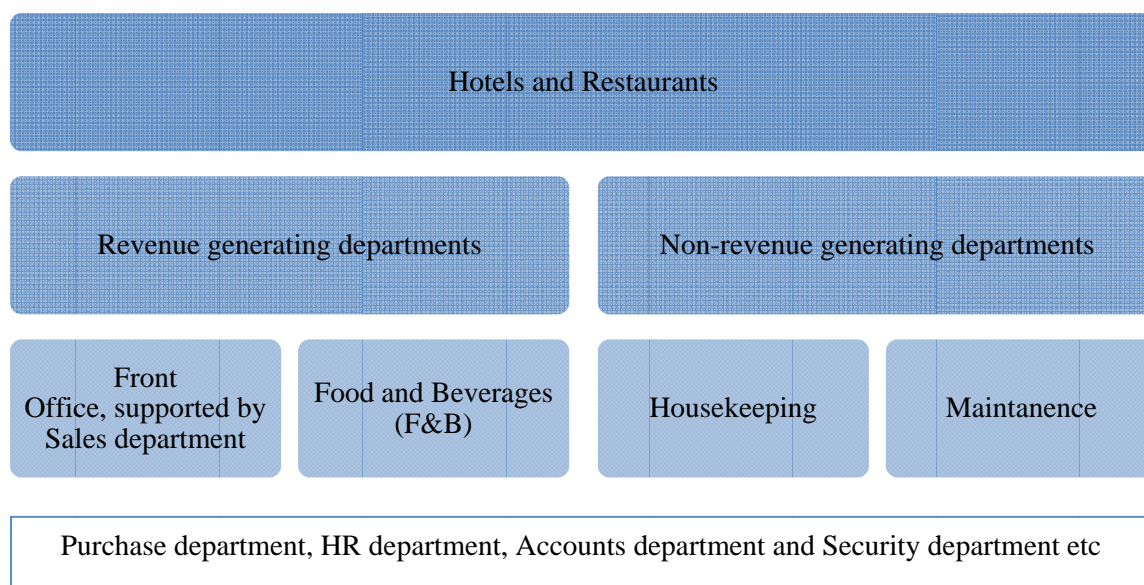
Function	Level	Skills required	Skill gaps
		<ul style="list-style-type: none"> ▪ Ability to work in a team ▪ Knowledge/awareness of the places, people and culture ▪ The knowledge of general decorum. ▪ Behavioural knowledge ▪ Passion for travelling ▪ Crises management ▪ Willingness to work hard/long time. 	<p>management.</p>
	Driver	<ul style="list-style-type: none"> ▪ Special driving skills required while driving on mountainous/high risk regions. ▪ Ensuring safety of passengers ▪ Awareness on driving rules and regulations ▪ Familiarity with routes ▪ Ability to communicate and being sensitive to tourists ▪ Awareness on various hotels and other locations in the travel route. ▪ Knowledge of First Aid ▪ Ability to attend minor problems in the vehicle e.g, changing vehicles tires, other minor mechanical problems, etc. ▪ Understanding the traveller's requirements in terms of location preferences and acting accordingly. ▪ Knowledge of English (in 	<ul style="list-style-type: none"> ▪ Lack of adequate communication skills (including English – when interacting with tourists such as international tourists) ▪ Inability to understand traveller's requirement. ▪ Unable to handle crisis situations. ▪ Lack of awareness on driving rules and regulations. ▪ Inadequate knowledge of safety norms ▪ Inadequate knowledge of First Aid.

Function	Level	Skills required	Skill gaps
		certain cases)	

Source: Industry inputs and IMaCS analysis

2.3.Skill Requirements and Gaps in Hotels & Restaurants Segment

Figure 15: Overall Structure of Hotels & Restaurants



Source: Primary Research and IMaCS analysis

Table 11: Function-wise Distribution of Human Resource – Hotels and Restaurants

Function	% of people
F&B Service	20%
F&B Kitchen	15%-20%
Housekeeping	15%-20%
Front office	8%
Management	8%
Engineering	8%
Purchase and Accounts	6%
Others (HR, Security, Accounts etc)	10% - 20%
Total	100%

Source: Primary Research and IMaCS analysis

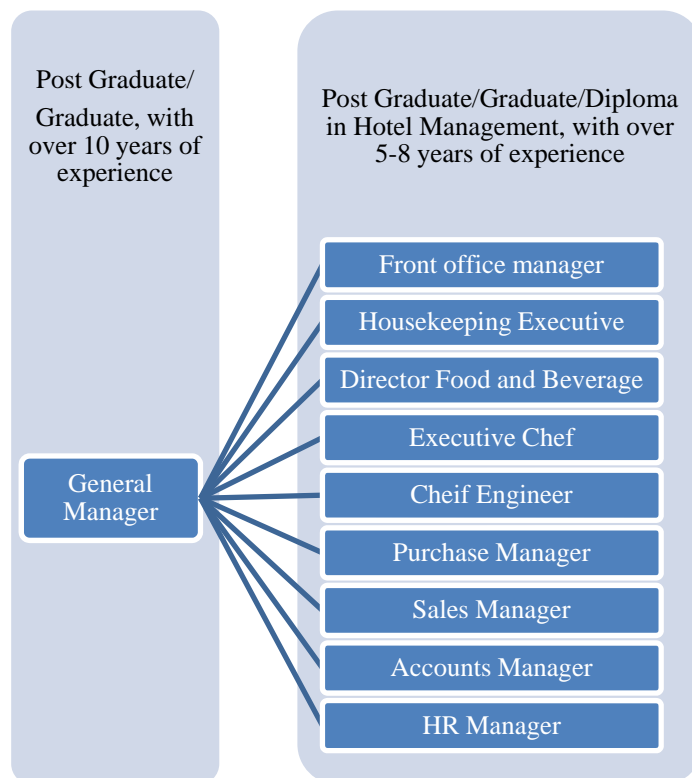
Table 12: Education-wise distribution of Human Resource in Hotels and Restaurants

Education Level	% of people	Functional area assigned
MBA, CA, CS, ICWA	5%	General Manager / Manager
Post Graduates/Graduates	20% - 30%	Managers / Supervisors / Assistants - Front office, F&B Services, Kitchen (Chef/Cook/Steward), House Keeping, Purchase, Sales, HR etc
Diploma	25% - 55%	Chef, Steward, Line cook, F&B services etc
High School and below	20% - 40%	Kitchen staffs, Front office – Bell boys, Waiters/Servers, Bartenders, Security guards, Room service etc
Total	100%	

Source: Primary Research and IMACS analysis

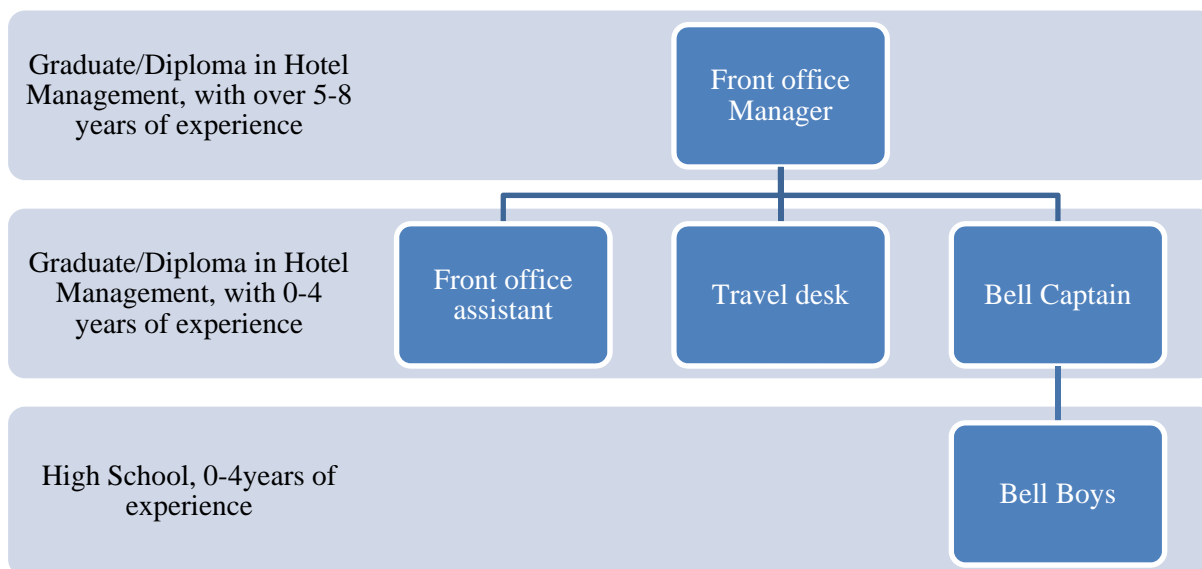
2.3.1. Profile, Skill Requirements and Skill Gaps in Hotels & Restaurants

Figure 16: Profile of People at Top Management Level



Source: Primary Research and IMaCS analysis

Figure 17: Profile of People in Front Office



Source: Primary Research and IMaCS analysis

Table 13: Skill Requirements and Skill Gaps in Front Office

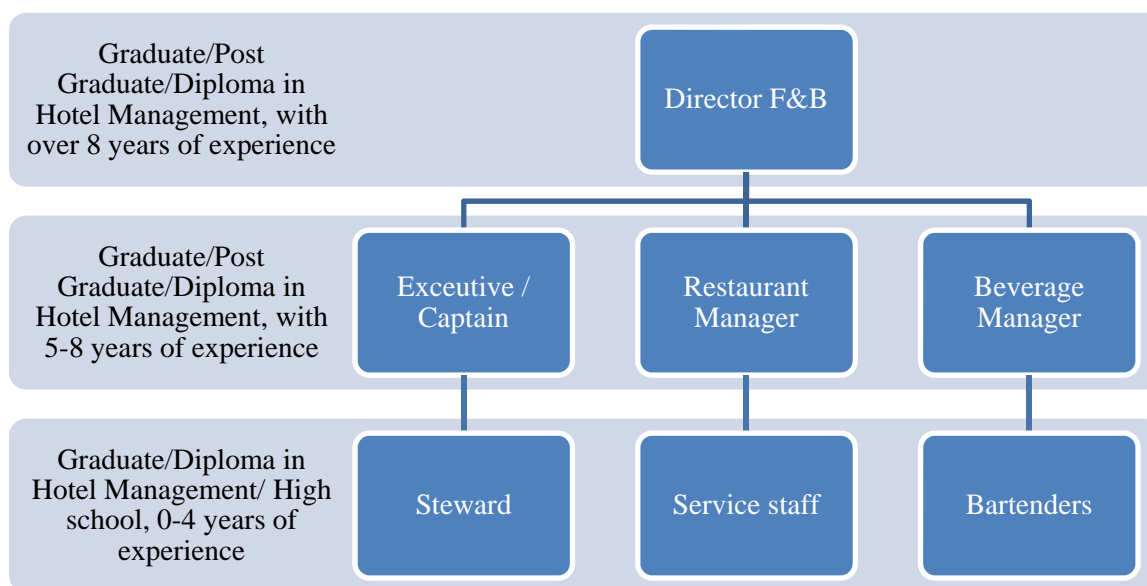
Function	Level	Skills required	Skill gaps
Front office	Front office manager	<ul style="list-style-type: none"> ▪ Ensure smooth functioning of the department ▪ Adequate problem solving skills ▪ Good communication skills ▪ Ability to maintain guest history and network with guests ▪ Review room availability status and promote sales. ▪ Co-ordination with F&B, Housekeeping etc. ▪ People management skills 	<ul style="list-style-type: none"> ▪ Inadequate skills in interact with guests ▪ Inadequate ability to proactively review occupancy and promote sales. ▪ Inadequate ability to manage team.
	Front office assistant	<ul style="list-style-type: none"> ▪ Adequate communication skills ▪ Ability to handle incoming and outgoing calls - telephone etiquette. ▪ Facilitating smooth client check-ins and check-outs ▪ Receiving checkouts settlement and maintain a proper account for the same. ▪ Knowledge on various hotel offerings, procedures, etc. ▪ Familiarity with billing software ▪ Familiarity with the local region to guide guests/tourists. 	<ul style="list-style-type: none"> ▪ Inadequate ability to listen to guests ▪ Inadequate communication skills ▪ Inadequate customer orientation ▪ Lack of knowledge about various service offerings in the hotel. ▪ Inadequate knowledge of billing software.
	Bell Captain	<ul style="list-style-type: none"> ▪ Inadequate supervisory skills ▪ Scheduling the duties for bell boys ▪ Maintaining arrival and 	<ul style="list-style-type: none"> ▪ Communication skill ▪ Supervisory skill ▪ Guest handling

Function	Level	Skills required	Skill gaps
		departure registers. <ul style="list-style-type: none"> ▪ Ability to ensure smooth check-ins and check-outs. ▪ Ability to interact with guests. 	
	Bell Boys	<ul style="list-style-type: none"> ▪ Recognising the guest ▪ High curtsy level ▪ Communication skill ▪ Ability to read and write English ▪ Ensuring the safety of luggage in the lobby. ▪ Maintain personal hygiene 	<ul style="list-style-type: none"> ▪ Inadequate curtsy level ▪ Lack of discipline ▪ Insufficient communication skills
	Travel desk	<ul style="list-style-type: none"> ▪ Booking air/hotel/train or cab based on the requirement of the guest. ▪ Awareness about the local areas/site seeing/shopping areas and suggesting the same to guest based on their interest. ▪ Communication skill 	<ul style="list-style-type: none"> ▪ Communication skill ▪ Inadequate awareness on the local areas.

Source: Industry inputs and IMaCS analysis

The profile of persons employed in the F&B services segment is detailed below.

Figure 18: Profile of People in Food and Beverage - Services



Source: Primary Research and IMaCS analysis

Table 14: Skill Requirements and Skill Gaps in Food and Beverage - Services

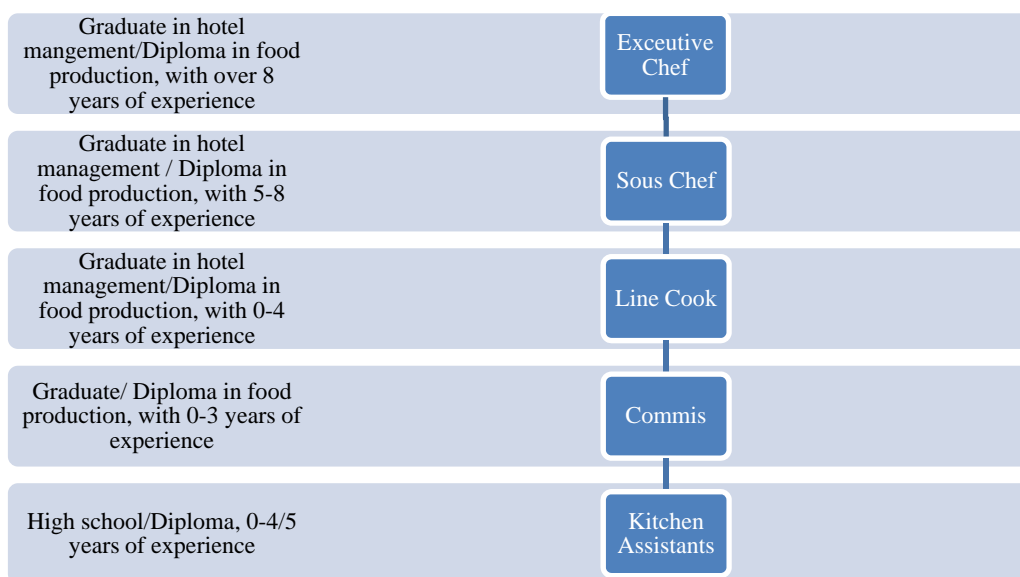
Function	Level	Skills required	Skill gaps
F&B - Services	Senior Captain/Captain	<ul style="list-style-type: none"> ▪ Supervisory skills ▪ Ability to manage F&B Inventory ▪ Basic knowledge of cuisines ▪ Good communication skills ▪ Ability to interact with guests ▪ Ability to manage team of stewards ▪ Ability to manage customer complaints 	<ul style="list-style-type: none"> ▪ Inadequate people management skills ▪ Inadequate skills in handling customer complaints.
	Sr. Steward/ Steward	<ul style="list-style-type: none"> ▪ Ability to handle guests ▪ Good communication skills ▪ Maintaining high level of hospitality and cleanliness ▪ Taking orders and serving food and beverages to guests 	<ul style="list-style-type: none"> ▪ Inadequate ability to manage guests ▪ Inability to proactively interact with guests and advise on menu.

Function	Level	Skills required	Skill gaps
		<p>at tables in a professional/courteous manner.</p> <ul style="list-style-type: none"> ▪ Ensuring correct and timely pick-up of food from kitchen for service, in case of delay, handle the situation. ▪ Ability to inspect kitchens, workrooms, and equipment for cleanliness. 	
	Restaurant Manager	<ul style="list-style-type: none"> ▪ Ability to ensure smooth functioning of restaurant ▪ Ability to minimise daily complaints ▪ Interacting with the guest and explaining the speciality of cuisines ▪ Ability to manage the shift ▪ Monitoring standards of facilities ▪ Ability to market the restaurant, including with institutions/corporate ▪ Co-ordination with other departments ▪ Ability to organise parties and functions. 	<ul style="list-style-type: none"> ▪ Inadequate skill in people management. ▪ Insufficient marketing and communication skills.
	Beverages Manager	<ul style="list-style-type: none"> ▪ People management ▪ Ability to manage the operation of bars, cafeteria services, etc. ▪ Co-ordination with all the other departments ▪ Ability to organise parties and 	<ul style="list-style-type: none"> ▪ Guest handling in bars ▪ Inadequate ability to address problems/complaints. ▪ Inadequate communication skills

Function	Level	Skills required	Skill gaps
		functions.	
	Waiter/Waitress /Service staff	<ul style="list-style-type: none"> ▪ Ability to take orders and serve food in a professional and courteous manner ▪ Ensuring cleanliness ▪ Maintain customer relationship ▪ Being cheerful and presentable 	<ul style="list-style-type: none"> ▪ Insufficient servicing skills ▪ Inadequate communication skills
	Bartenders	<ul style="list-style-type: none"> ▪ Ability to converse with guest to understand their requirements ▪ Management of production of cocktails, mocktails, etc, ▪ Inventory management of all the sprits, soft drinks, etc. ▪ Billing 	<ul style="list-style-type: none"> ▪ Poor customer orientation Inadequate knowledge of production of cocktails, mocktails etc. ▪ Inadequate communication skills

Source: Industry inputs and IMaCS analysis

Figure 19: Profile of People in Food Production / F&B - Kitchen



Source: Primary Research and IMaCS analysis

Table 15: Skill Requirements and Skill Gaps in Food Production

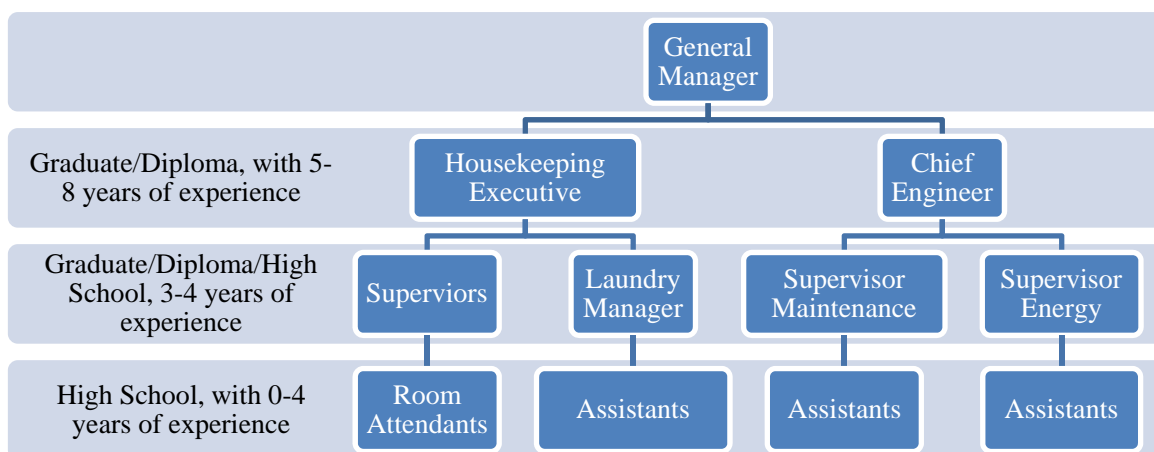
Function	Level	Skills required	Skill gaps
Food Production	Executive Chef/ Head Chef	<ul style="list-style-type: none"> ▪ Ability to prepare different kinds of cuisine ▪ Awareness on food calorific values. ▪ People management ▪ Administrative skill ▪ Flair for creativity – Innovation in food preparation ▪ Food presentation skills ▪ Ability to plan menu ▪ Knowledge on food costing ▪ Quality control ▪ Inventory management ▪ Communication skills 	<ul style="list-style-type: none"> ▪ Inadequate awareness on latest cuisines ▪ Inadequate people management skills ▪ Inadequate knowledge of cost management
	Sous Chef	<ul style="list-style-type: none"> ▪ Assisting Executive Chef ▪ Ability to manage kitchen operations in case of absence 	<ul style="list-style-type: none"> ▪ Inadequate awareness on latest cuisines ▪ Inadequate ability on

Function	Level	Skills required	Skill gaps
		of Executive Chef. <ul style="list-style-type: none"> ▪ Scheduling manpower and preparing duty sheets. ▪ Menu planning and menu engineering ▪ Standardising dishes, recipes etc. – Yield management ▪ Ensuring hygiene and cleanliness ▪ Training kitchen staff ▪ Quality control of food ▪ Inventory management ▪ Ability to plan and oversee food production. ▪ Communication skills 	management skills related to menu planning, scheduling, etc.
	Line Cook	<ul style="list-style-type: none"> ▪ Knowledge on cuisines ▪ Ability to prepare menu items ▪ Ensuring hygiene and cleanliness ▪ Familiarity with all kitchen equipments ▪ Communication skills ▪ Time management 	<ul style="list-style-type: none"> ▪ Insufficient knowledge on cuisines ▪ Time management
	Commis	<ul style="list-style-type: none"> ▪ Basic Culinary skills ▪ Hygiene knowledge ▪ Ability to assist line cook 	<ul style="list-style-type: none"> ▪ Inadequate culinary skills ▪ Inadequate knowledge of hygiene
	Kitchen Assistance	<ul style="list-style-type: none"> ▪ Dish washing ▪ Cleaning and handling vessels etc ▪ Maintain a clean kitchen environment etc. ▪ Discipline at workplace ▪ Maintaining personal hygiene 	<ul style="list-style-type: none"> ▪ Communication skills ▪ Lack of attitude to work hard ▪ Inadequate knowledge of hygiene ▪ Inadequate exposure to

Function	Level	Skills required	Skill gaps
			working in a kitchen.

Source: Industry inputs and IMaCS analysis

Figure 20: Profile of People in Housekeeping and Maintenance



Source: Primary Research and IMaCS analysis

Table 16: Skill Requirements in Housekeeping and Maintenance

Function	Level	Skills required
Housekeeping	Executive - Housekeeping	<ul style="list-style-type: none"> ▪ Ensure smooth functioning of the department (such as housekeeping) ▪ People management skills ▪ Problem solving skills ▪ Ability to groom staff ▪ Knowledge of using housekeeping equipments, vacuum cleaning machines, laundry, etc. ▪ Ability to interact with guests.
	Supervisors	<ul style="list-style-type: none"> ▪ Adequate supervisory skills ▪ Ability to plan and allocate work ▪ Ability to inspect rooms ▪ Reporting, daily briefing the staff ▪ Complaint handling ▪ Ability to maintain a polite and cheerful

Function	Level	Skills required
		appearance/personage.
	Room Attendants	<ul style="list-style-type: none"> ▪ Daily room cleaning. ▪ Attending to guest requests promptly. ▪ Understanding guest's needs and requirements, and servicing accordingly. ▪ Inspecting linens, toilets, consumables etc. ▪ Upkeep of public/common areas, restaurant, conference hall, etc. ▪ Ability to communicate in English.
Laundry	Laundry Manager	<ul style="list-style-type: none"> ▪ Ensure smooth functioning of washing units ▪ Knowledge on chemical mixing and cleaning ▪ Ability to work in cleaning equipments
	Laundry /Linen Assistants	<ul style="list-style-type: none"> ▪ Collection, sorting and marking. ▪ Loading and unloading of cloths in the machines, pressing and delivery of guest laundry and linens.
Maintenance	Chief Engineer	<ul style="list-style-type: none"> ▪ Ensure proper functioning of all equipments ▪ Ability to coordinate with related departments ▪ Ability to assist the management in planning investments ▪ Engineering administration ▪ Inventory management of spare parts ▪ Ability to handle crises in machinery-related areas/power supply/generator sets
	Supervisor Maintenance	<ul style="list-style-type: none"> ▪ Ensuring proper working condition of all machineries ▪ Maintaining schedule ▪ Allocation of work

Function	Level	Skills required
		<ul style="list-style-type: none"> ▪ Addressing complaints
	Supervisor (Energy)	<ul style="list-style-type: none"> ▪ Ensuring uninterrupted supply of energy ▪ Ability to address complaints
	Assistants	Technical skills in relevant areas, such as Plumbing, Carpentry, Painting, electricians, maintaining HVAC systems.,

Source: Industry inputs and IMaCS analysis

In addition to the above, basic computer knowledge is a must for anyone working at supervisory level and above in all the departments.

2.4. Employment Intensity in Hotels and Restaurants

The following table presents the employment intensity and profile of people across different categories of Hotels and Restaurants:

Table 17: Employment Intensity and Profile of People – Hotels

Particulars	Employment Intensity*	Profile of people employed
Five, Four Star/Heritage Hotels	174	Mostly highly trained/skilled with hotel management degree/diploma
Three, Two & One Star Hotels	122	Managers & supervisors are generally highly trained/skilled. Junior staffs are just graduates or even SSC pass/dropouts
Other Hotels in the unorganised Sector	22	Very few trained manpower. Most of the employees consist of untrained manpower

Source: Ministry of Tourism, Government of India; IMaCS analysis; *Employees per 100 rooms

As we can see from the above, Five/Four star & Heritage hotels have the highest employment intensity and also have the maximum demand for highly skilled/trained manpower.

Table 18: Employment Intensity and Profile of People - Restaurants

Particulars	Employment Intensity*	Profile of people employed
Conventional restaurants	26	Generally half of the persons employed in kitchens of conventional restaurants, cafes and fast food outlets are diploma holders either from private hotel management institutions or Food Craft Institutes. 10-20% of people in F&B Service are Hotel management degree/diploma holders
Cafes	31	
Fast food outlets	32	
Dhabas / Bhojanalayas	26	

Source: Ministry of Tourism, Government of India; IMaCS analysis; *Employees per 100 chairs

The above table depicts that employment intensity is more or similar across all the categories and the demand for skilled/trained manpower is also similar in all the categories except Dhabas/Bhojanalayas.

3. Current Skill Development Initiatives in the Tourism Industry

The Government, through the Ministry of Tourism, is engaged in several activities for skill development. The Government is engaged in making available trained human resource through its network of Institutes of Hotel Management and Indian Institutes of Tourism and Travel Management.

3.1.NCHMCT, IHM, FCI programmes

The Government established the National Council for Hotel Management and Catering Technology (NCHMCT) in the year 1982. The NCHMCT and its affiliate institutes impart MSc programmes in Hospitality, Diploma, and Certificate Courses.

There are about 41 Institutes of Hotel Management (IHMs) and 5 Food Craft Institutes (FCIs) in the country offering such courses. The PG, Diploma, and Certificate Courses are offered are detailed below.

Table 19: PG, Diploma, and Certificate Courses offered by IHMs through NCHMCT

S.No.	Course	Duration	Qualification	Upper Age Limit	Location of Institutes where Course is available
1.	M.Sc. Hospitality Administration	2 Years	B.Sc.in H.M. or 3 yr Diploma in HM	NA	IHM – Bangalore, Delhi, Mumbai
2.	Post Graduate Diploma in Accommodation Operation and Management	1½ Years	Graduation in any Stream	25	IHM - :Bhopal, Bhubaneswar, Mumbai, Kolkata, Chennai, Delhi (Pusa), Gwalior, Hyderabad, Shimla, Thiruvananthapuram , Faridabad (FCI)
3.	Post Graduate Diploma in Dietetics and Hospital Food Service	1 Year	Graduate with Science or Bachelor in Home Sc.	25	IHM - Chennai, Delhi (Pusa) and Mumbai
4.	Craftsmanship Course in Food Production	1½ Years	10th Class pass of 10+2	22	IHM - Bhopal, Bhubaneswar, Mumbai, Kolkata, Chennai, Goa, Gwalior Shimla, Delhi (Pusa), Thiruvananthapuram
5.	Craftsmanship Course in Food and Beverage Service	24 weeks	10th Class pass of 10+2	22	IHM - Mumbai, Kolkata, Chennai, Goa, Shimla
6.	Certificate Course in Hotel and Catering Management	6 Months	Class XII of 10+2 system or equivalent	NA	IHM : Mumbai, Chennai
7.	Diploma in Food Production	1½ Years	10+2 or equivalent	22	FCIs - Ajmer, Chandigarh, Darjeeling, Faridabad, Gangtok, Jodhpur, Udaipur
8.	Diploma in Food and Beverage Service	1½ Years	10+2 or equivalent	22	FCIs - Ajmer, Chandigarh, Darjeeling, Faridabad, Gangtok, Jodhpur, Udaipur, IHM-Delhi (Pusa)
9.	Diploma in Front Office	1½ Years	10+2 or equivalent	22	FCIs - Ajmer, Chandigarh, Darjeeling, Faridabad, Gangtok, Jodhpur, Udaipur
10.	Diploma in House Keeping	1½ Years	10+2 or equivalent	22	FCIs - Ajmer, Chandigarh, Faridabad, Jodhpur, Udaipur
11.	Diploma in Bakery and Confectionery	1½ Years	10+2 or equivalent	22	FCI - Chandigarh, IHM-Delhi (Pusa)

Source: NCHMCT

The NCHMCT through IHMs and FCIs also offers 3/6 month certificate courses in the following areas:

- Food Production
- F&B
- 3 month Crafts Courses.

3.2.Capacity Building for Service Providers

There are a large number of persons who are engaged in the unorganised sector such as small hotels, road-side eating places, ticketing/ travel agencies, dhabas, etc. There is also a segment of tourism service providers who are engaged in other professions but come in contact with the tourist. These persons are staff at bus/ railway stations, police personnel, immigration staff at airports, coolies, taxi/ coach drivers, staff at monuments, guides etc. The tourists come into contact with various service providers and it is this experience they have, while interacting, that governs their experience of India as a tourist destination.

It was therefore felt necessary that this large number of service providers be given certain inputs which can improve their behavior and service levels. Therefore a Scheme was formulated wherein these service providers in the unorganised sector are given some inputs so as to upgrade their behavior and service skills. This Scheme is the '*Capacity Building for Service Providers (CBSP)*'.

Some of the important areas being covered under the training include health & personal hygiene, cleanliness, basic service techniques, cooking techniques, garbage disposal, etiquette and basic manners, basic nutrition values, etc. Energy saving and basic tourism awareness, communication skills, behaviour skills, first aid, client handling and behavioural skills, etc. are also covered in the training programmes. The duration of the course ranges from 4 days to 6 days.

The trainings that can be offered by service providers under the guidelines of this Scheme are outlined in the following table.

Table 20: Certificate Courses under the CBSP scheme

S. No.	Training	Duration
i.	Guide Training Courses Induction Training Programme for Regional Level Guides Refresher Level Course for Regional Level Guides	Duration 10 Days Programme
ii.	Skill Up-gradation in general for existing	Duration 3 months (class/lab)

S. No.	Training	Duration
	service providers	
iii.	Language courses for Guides and other service providers	Duration 3 months (class/lab)
iv.	Skill Development in general for fresh candidates	Duration 6 months (class/lab)
v.	Promotion of rural tourism in the villages based on present programme being implemented with UNDP assistance	Duration 3 – 6 months
vi.	Training programs for the training of trainers	Duration 15 – 30 days
vii.	Tourism Awareness Programme	Duration 4 - 6 days
viii.	Customised Programmes Suo-moti Initiatives of the Ministry of Tourism	Need-Based

Source: Ministry of Tourism

3.3. Indian Institutes of Tourism and Travel Management (IITTM)

The Indian Institute of Tourism and Travel Management (IITTM), an autonomous organisation of the Ministry of Tourism, Government of India, is one of the premier institutes in the country offering education, training, research and consultancy in sustainable management of tourism, travel and allied sectors. The IITTM came into being on 1983 with its registration at New Delhi. The IITTM has its headquarters at Gwalior (set up in 1992) with centres at Bhubaneswar (set up in 1996) and Noida.

In the year 2004, the National Institute of Water Sports (NIWS), Goa was also incorporated in the IITTM. It has been decided to set up another centre of the IITTM at Nellore in Andhra Pradesh. The management of the IITTM vests in its Board of Governors having the Union Minister for Tourism as Chairperson.

This multi-campus Institute offers various programmes in tourism and related fields, services and international business along with various extension programmes for capacity building. Faculty of institute is also engaged in research and consultancy addressing local needs.

The IITTM presently offers 4 AICTE approved PGDM programmes from its three centres. As of now the student intake in each programme is 69 which is likely to go up to 93 by 2010.

Table 21: Courses offered under IITTM

Centre	Topic areas	Details
Gwalior	Tourism and Travel	Ticketing, Cargo management and Tour operations
	International Business	International Tourism, International Trade Operations, etc

Centre	Topic areas	Details
	Services	Tourism-Hospitality and others
Bhubaneswar	Tourism and Travel	Ticketing, Cargo management and Tour operations
	International Business	International Tourism, International Trade Operations, etc.
Delhi	Tourism and Leisure	Adventure/ MICE

The Ministry of Tourism has also formulated a scheme for Financial Assistance to IHMs, FCIs, IITTM, ITIs, Polytechnics, Institutes, Vocational Schools, etc. for the setting up and upgradation of Institutes of Hotel Management & Catering Technology & Applied Nutrition (IHMs), Food Craft Institutes (FCIs) in the country.

As is seen above, the Government/Ministry of Tourism has taken several initiatives to build skills in the Tourism sector.

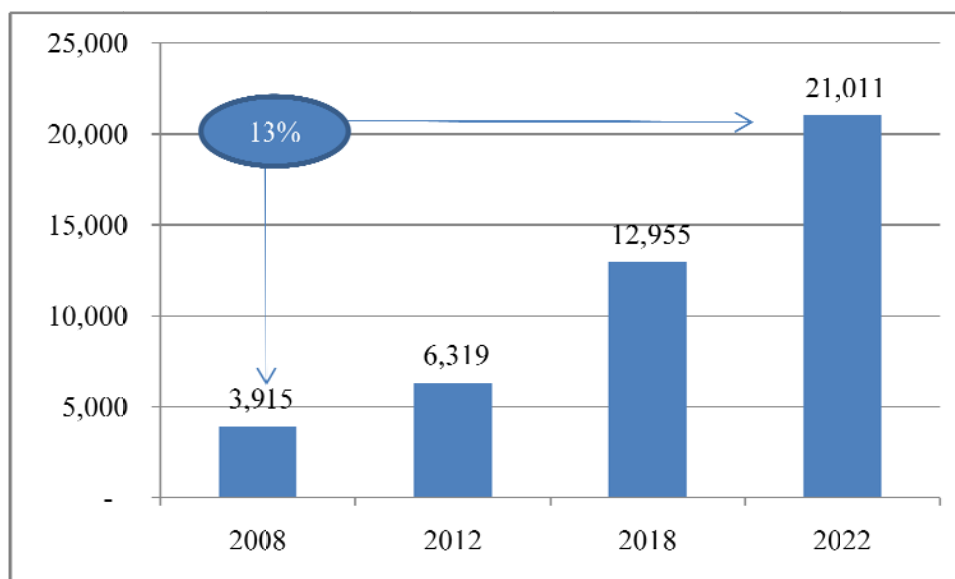
However, given the large requirement of human resource (as outlined in the following section), there exists room for training providers to further offer training and build skills in the Tourism sector in areas highlighted in this section and also under the section titled 'Possible Focus Areas for Skill Building'.

4. Projected Size and Human Resource Requirement

4.1. Projected Size of the Industry

The size of the Tourism industry is expected to grow from Rs. 4,413 billion currently to about Rs. 21,011 billion by 2022, growing at a CAGR of 13%.

Figure 21: Projected Size of Tourism Industry (Rs. billion)



Source: World Travel & Tourism Council and IMaCS analysis

4.2. Projected Human Resource Requirement for Tourism Industry

The projected human resource requirement in the Tourism Industry is shown below

Table 22: Direct and Indirect Employment in Tourism Industry ('000 jobs) – 2008-2022

Particulars	2008	2012	2018	2022	Incremental (2008-2022)
Direct Industry Employment*	12,602	13,730	15,614	17,011	4,409
T&T Economy Employment	30,330	33,552	39,039	43,187	12,857

Source: World Travel & Tourism Council; IMaCS analysis

*Direct industry employment includes all the revenue generating activities related to the Tourism industry.

However, this includes the employment due to tourism related activities in ‘satellite’ industries as well⁶ (effect of tourism on industries such as food processing, railways and road, footwear, toiletries, etc., and the effects on employment thereof)

For the purpose of this study and further projections, we consider employment – human resource requirement – in the ‘core tourism sectors’ – Hotels and Restaurants, and Tour Operators.

The overall employment by 2022 in the Tourism Industry (in Hotels and Restaurants and Tour Operators) is estimated to be about 7.2 million persons. Segment wise details are given below.

Table 23: Human Resource Requirements in Tourism Industry (in '000s)

	2008	2012	2018	2022	Incremental (2008-2022)
Hotels	1,289	1,869	2,939	4,065	2,775
Restaurants	2,112	2,481	2,639	2,834	723
Tour Operators	129	164	220	273	144
Total	3,530	4,514	5,798	7,172	3,642

Source: Ministry of Tourism, Government of India and IMAcS Analysis

The details of human resource requirement for Hotels, Restaurants, and Tour Operators is detailed below.

4.3. Projected Human Resource Requirement for Hotel Segment

The human resource requirement for Hotels and Restaurants is presented below.

Table 24: Projected human resource requirement –Hotels (in '000s)

Particulars	2008	2012	2018	2022
Hotels				
Five, Four Star/Heritage Hotels	76	91	104	117
Three, Two & One Star Hotels	60	66	79	88
Other Hotels in the unorganised Sector	1,153	1,712	2,756	3,860
Total	1,289	1,869	2,939	4,065

Source: Ministry of Tourism, Government of India and IMAcS Analysis

⁶ Refer report ‘Tourism Satellite Account for India’, Ministry of Tourism

Apart from the above there are substantial numbers of eating places, to cater to both the commercial as well as leisure road travellers along the national and state highways. These units are estimated to employ 1,300,000 employees in 2002.

It should be kept in that apart from the employment generation for skilled/trained manpower arising out of new establishments, there would be additional employment generation for skilled/trained manpower from the conversion of the unorganised sector to organised sector.

As seen in the above table, the employment in the hotel category (excluding motels along the highway) is forecasted to increase to over 1.9 million in 2012, 2.9 million by 2018 and 4 million in 2022. This will create an incremental employment opportunity in the following major functions:

Table 25: Incremental Human Resource Requirement for Hotels (in '000s) till 2022

Function	Incremental human resource requirement (in '000s)
Front office	5
F&B Services	583
F&B Kitchen	393
Housekeeping	634
Total Incremental Requirement	2,772

Source: Ministry of Tourism, Government of India; Primary Research and ImaCS Analysis

Though Front office accounts only for around 8% of the work force, they play a critical role in the development of the business and our interactions with the players reveals that the current skill sets available for the front office are not up to the extent required.

Table 26: A Further Break-Up of Incremental Human Resource Requirement till 2022 – Hotel (in '000s)

Function	Incremental Human Resource Requirement (in '000s)
Front office	
Managers	1.2
Supervisors	1.4
Front Office Assistants	2.7
F&B Services	
Managers	23.8

Function	Incremental Human Resource Requirement (in '000s)
Captains	37.0
Stewards	125.8
Waiters	396.4
F&B Kitchen	
Chefs	20.5
Cooks	199.6
Kitchen Assistants	173.1
Housekeeping	
Managers	12.9
Supervisors	51.2
Room Attendants	429.4
House-men	140.6

Source: Ministry of Tourism, Government of India; Primary Research and IMaCS Analysis

4.4. Projected Human Resource Requirement for Restaurants Segment

The incremental human resource requirement in the Restaurants category is estimated to be around 0.72 million. In this, about 50% of the incremental requirement (0.34 million) would be in the Conventional Restaurants category.

Table 27: Employment Forecasts (in thousands) –Restaurants

Particulars	2008	2012	2018	2022
Restaurants				
Conventional restaurants	1,143	1,315	1,392	1,482
Fast food stores	368	438	469	507
Cafes	367	451	483	527
Dhabas/Bhojanalaya	233	277	295	318
Total	2,112	2,481	2,639	2,834

Source: Ministry of Tourism, Government of India and IMaCS Analysis

The details of incremental human resource requirement in *Conventional Restaurants* is shown below.

Table 28: Incremental Employment for Conventional Restaurants till 2022 (in '000s)

Function	Incremental Human Requirement till 2022 (in '000s)
Management	7
Kitchen	129
Service	142
Others	61
Total Increment (2008-2022)	339

Source: Ministry of Tourism, Government of India; Primary Research and IMaCS Analysis

Table 29: A Further Break Up of Manpower Requirement – Conventional Restaurants (in '000s)

F&B Kitchen	
Chefs	12
Cooks	62
Assistants	55
F&B Service	
Managers	6
Captains	17
Butlers/Stewards/Waiters	120

Source: Ministry of Tourism, Government of India; Primary Research and IMaCS Analysis

4.5. Projected Human Resource Requirement for Tour Operators Segment

The key functions among travel agencies and tour operators are those of *group tours, ticketing, and accounts*. These account for 55% of all the employees in this sector. The tour section employs a substantial numbers of casual workers (to the extent of 20%).

Travel trade is estimated to employ approximately 0.13 million people in 2008. This number is estimated to grow to 0.16 million by 2012 and 0.22 million by 2018. Travel trade is estimated to employ 0.3 million by 2022⁷, leading to an incremental human resource requirement of 0.14 million.

Table 30: Function-wise Incremental Human Resource Requirement till 2022 – Travel Trade/Tour Operators (in '000s)

⁷ Ministry of Tourism, Government of India and IMaCS analysis

Functions	Incremental Requirement (2008 – 2022)
Ticketing	36
Accounts	21
Tours	22
Administration	18
Operations	16
Sales & Marketing	8
Others	22
Total	144

Source: Ministry of Tourism, Government of India; Primary Research and IMaCS Analysis

4.6. Possible Focus areas for Skill Building

Based on our interaction with industry, and as detailed in the above sections, a large portion of the demand for human resource would occur in the following areas:

- **Hotels and Restaurants:** Front office staff, F&B Services and Kitchen, and Housekeeping staff
- **Tour operators:** Ticketing and Sales, Tour Guides.

The broad contours for skill development in these areas are outlined below:

Table 31: Focus Areas – Hotels and Restaurants

Function	Skill Requirement
Front Office	<p><u>Technical skills</u></p> <ul style="list-style-type: none"> ▪ Managing guests ▪ Call handling – incoming and outgoing ▪ Billing ▪ Maintaining registers ▪ Paying attention to details <p><u>Soft skills</u></p> <ul style="list-style-type: none"> ▪ Communication skills ▪ Team work skills ▪ Attitude to listen ▪ Behavioural and interpersonal skills.

Function	Skill Requirement
F&B Services	<p><u>Technical skill</u></p> <ul style="list-style-type: none">▪ Managing guests▪ Adequate knowledge of menu and cuisines▪ Cleanliness and hygiene▪ Simple Billing▪ Complaint handling <p><u>Soft skill</u></p> <ul style="list-style-type: none">▪ Communication skills▪ Dedication to work▪ Behavioural skills
F&B Kitchen	<p><u>Technical skill</u></p> <ul style="list-style-type: none">▪ Latest cuisines▪ Innovation/creative skill towards developing new offerings▪ Handling kitchen equipments▪ Yield management▪ Staff management▪ Cost management▪ Hygiene and cleanliness <p><u>Soft skill</u></p> <ul style="list-style-type: none">▪ Communication skills▪ Time management skills▪ Behavioural skills▪ Attitude to work
House Keeping	<p><u>Technical skill</u></p> <ul style="list-style-type: none">▪ Inspection of rooms, consumables, etc.▪ Complaint handling▪ Responding to guest requirements▪ Up keeping of public places, restaurants, conference halls etc.▪ Cleanliness and hygiene▪ Ability to use all the housekeeping equipments <p><u>Soft skill</u></p> <ul style="list-style-type: none">▪ Team work▪ Communication skills

Function	Skill Requirement
	<ul style="list-style-type: none">▪ Attitude to work

The broad contours of skill development in Tour Operators is detailed below.

Table 32: Focus Areas – Travel and Tour Operators

Function	Skill Requirement
Ticketing	<p><u>Technical skill</u></p> <ul style="list-style-type: none">▪ Passenger routing skills▪ Ability to act as a travel advisors▪ Maintaining a cordial relationship with the clients/travellers▪ Geographical knowledge▪ Knowledge on various hotels and site seeing locations▪ Networking skills▪ Ability to use ticketing software – Amadeus, etc.▪ Procedural knowledge on Visa/ Passports <p><u>Soft skills</u></p> <ul style="list-style-type: none">▪ Time management▪ Telephone etiquette▪ Communication skills
Tours – Guides	<p><u>Technical skill</u></p> <ul style="list-style-type: none">▪ Knowledge/ awareness on the area, people, culture etc.▪ Historical knowledge/significance of tourist locations▪ Skill to handle tourists▪ Skill to understand the tourist requirements▪ Decision making skills▪ Organising ability <p><u>Soft skills</u></p> <ul style="list-style-type: none">▪ Time management▪ Communication skills.

The human resource requirement in the above areas account for more than 85% of the incremental human resource requirement in the Tourism Sector and would be possible areas to target skill building initiatives.

The current initiatives of underway by the Government (under the Ministry of Tourism) are already in the above direction. However, keeping in mind the large demand, there is further scope for training providers and other agencies to channelise efforts in skill building in the above areas.

This report has been prepared by **ICRA Management Consulting Services Limited (IMaCS)**.

IMaCS is a multi-line management and development consulting firm headquartered in India. It has an established track record of over 15 years in consulting across various sectors and countries. IMaCS has completed over 950 consulting assignments and has worked in over 30 countries across the globe. Through the process of carrying out several assignments over the last decade and half, IMaCS has accumulated considerable analytical and consulting expertise, backed by the following capabilities:

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