



Unlocking Entrepreneurship Opportunities for Women

A Report by Global Alliance for Mass Entrepreneurship

September 2019



FACEBOOK

Report:

Unlocking Entrepreneurship Opportunities for Women in Urban India

→ A market-led approach for home-based businesses

September 2019

Supported by: Facebook



▪ Introduction & Summary

- Sector prioritization
- Voice of Market
 - Food sector
 - Education sector
- Voice of Entrepreneur
 - Food sector
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- Workshops
- Interventions



The Global Alliance for Mass Entrepreneurship (GAME) is a multi-stakeholder alliance which aspires to catalyse the creation of 10 million young entrepreneurs in India, at least half of whom will be women, who, in turn, will create 50 million new jobs by 2030. There is a growing recognition that alongside ready job-seekers, we need job creators. GAME focuses on the middle of the entrepreneurship spectrum, the Mass Entrepreneurs, who typically employ 5-20 people and have been the engines of job growth in the majority of dynamic economies. Women in India own and run far fewer business than other countries, accounting for only 6%¹ of mass entrepreneurs.

At 23%², India is currently one of the worst performing nations in terms of female labour force participation rates. A rebalancing of the gender force can increase India's GDP significantly (20% by some estimates). In looking at the reasons for gender disparity, several issues emerge. Amongst others, the reasons can be ascribed to:

Lower demand for women in the workforce as compared to men – Nature of industry, place and safety of work, maternal benefit policies, etc. The transition from a labour-intensive agrarian to a more mechanized industrial economy, is costing women, with no clear path emerging to absorb a growing population of educated women. India needs to invest more in sectors which are conducive to women – as employees and as entrepreneurs.

Unpaid care work which occupies a large percentage of the working-age female population – As primary care-givers of the family unit, women are restricted from being able to venture out for paid work. Home-based (or near-home) businesses can therefore present women with an additional income stream and a means towards economic and social empowerment, however starting and growing such businesses is hampered due to limited mobility, lack of equitable access to markets, ecosystem support, etc.

We initiated this study to identify demand-led macro unlocks that can drive growth for urban women (primarily the homepreneur segment), taking the lens of mass entrepreneurship. The intent was to present opportunities to ecosystem stakeholders, such that innovation, interventions, policies and business models can emerge that can lead to a conducive environment creating a path to bringing more women into the labour force in India. Part research and part strategy, our aim was to start with a sectoral analysis and look at both the demand and supply sides to present:

- The top 2 sectors for mass entrepreneurs based on growth potential of the sector demand, natural fitment with the target segment, alignment with potential to scale towards mass entrepreneurship
- Assess mega-trends for future growth and High-potential opportunities and viable lighthouse ideas that provide maximum market opportunity to various stakeholders
- Current landscape of use cases in these opportunities, pain points of women entrepreneurs and stakeholders that can be addressed to unlock scale
- Initiatives and partnership roles where there is potential to drive the mass entrepreneurship charter for urban women (home) entrepreneurs

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	Prioritize sectors	Assess voice of market	Assess voice of entrepreneur	Conduct design thinking workshop	Synthesize
Activities	<p>Prioritize sectors for women ME based on</p> <ul style="list-style-type: none"> Prevalence of women-owned enterprises currently Sectors with large base of employed women Economic potential of sector, growth momentum & tailwinds Availability of easy-to-start business models 	<p>For prioritized sectors, capturing demand-side perspective</p> <ul style="list-style-type: none"> Growth pockets (e.g. home-cooked meal delivery in food) Megatrends driving demand for new entrepreneurs 'Lighthouse' ideas emerging for women ME (e.g. setup day-cares in education) 	<p>Ethnographic study of entrepreneurs within these lighthouse ideas in Bangalore and Mumbai</p> <ul style="list-style-type: none"> Needs & aspirations Barriers to scale Influence of external factors e.g. family, community Detailed entrepreneur archetypes Key insights and what needs to be done to address barriers 	<p>Working with industry leaders in prioritized sectors to validate / cement findings from market & entrepreneur</p> <ul style="list-style-type: none"> Invite leaders covering 360 deg landscape of sector Adopt design-led approach to co-create solutions for entrepreneurs and brainstorm on role of GAME 	<p>Step-back on all elements</p> <ul style="list-style-type: none"> Prioritize & segment ideas emerging from market, entrepreneurs and the workshops
Outcomes	<ul style="list-style-type: none"> 2 prioritized sectors (food, education) 	<ul style="list-style-type: none"> 5-10 'lighthouse' ideas or business models for ME in prioritized sectors 	<ul style="list-style-type: none"> 2-3 entrepreneur archetypes (for design thinking workshop) with resp. needs, aspirations & barriers Unlocks / interventions for setup & scaleup 	<ul style="list-style-type: none"> Validation of 5-10 interventions that can boost ME in prioritized sectors 	<ul style="list-style-type: none"> Interventions for ecosystem to boost ME

While textile, food, personal services and education together account for 65% of women-owned businesses and 58% of female employment in urban India, **Food and Education** sectors emerge as the top 2 sectors that are amenable to mass entrepreneurship (can grow to hiring 5+) where women are present in larger numbers as both employees and enterprise-owners.

These 2 sectors also offer the highest economic potential and easy-to-start business models, strong headwinds and tailwinds (eg where employment levels are much higher than entrepreneurship levels, offering a natural tailwind for entrepreneurship in this space).

By 2025, we estimate that *given the right interventions*, if employment levels matched with entrepreneurship levels for certain sub-sectors in Food and Education amenable to women, there could be a **potential ~900K additional women entrepreneurs**. Since women employ more women (homophily), this could translate to a ripple effect on female LFPR.



Food

- One of the largest sectors in India (exp. INR 800K Cr GVA by 2025)
- Growing at 10-15% per annum with some segments e.g. online ordering growing 20%+
- 550K enterprises owned by women (22% of all women-owned enterprises)
- 2Mn women working in this sector
- Various easy-to-start businesses that require low investment & offer flexible work schedules



Education

- Sector estimated to reach INR 300K Cr in Gross Value Added by 2025
- High growth with 15-20% growth across segments (among the highest in the country)
- Prevalence of women owned businesses - 20% urban enterprises owned by women (highest among all sectors in urban India)
- High female labor base, ~48% of all employees in this sector are women (highest proportion amongst sectors)



Megatrends

In Food Retail, packaged food categories within small enterprises grew at 20%+

- Rise in snackification as the 'fourth meal' with preference for regional & healthy
- Growing demands for ready-to-cook meals among urban consumer
- Return of the authentic, Indian palette
- Aspiration for curated, artisanal foods across categories
- Rise in health-conscious consumers (but no compromise on taste)

Lighthouse ideas in packaged food retail

- Home-made snacks/ ready-to-eat for B2C or B2B consumption, retailer demand
- Artisanal gourmet eg. Baked goods for niche food retail, online channels and influencer selling
- Organic products for aggregator demand
- Fresh ready-to-cook with focus on packaging. storage



Organized food service market growing at 10% CAGR with Food tech continuing to 'organize the unorganized'

- Eating out continues to rise amongst urban millennials
- Rising online orders with preference for home-cooked meals (with no compromise on price point & speed of delivery)
- Food tourism rising as Indian cuisine gains popularity
- Occasional celebrations generating demand for new age catering
- Increasing trend of experimenting new cuisines

Lighthouse ideas in food services/ experience

- Cloud / home based kitchens to provide home-cooked meals
- Cooperative canteens, catering units, cafes for services to corporates/events; ethnic foods by low-income groups
- Culinary experiential tours and services for pop-up home dining or learning
- Online/offline vocational training and workshops for budding chefs, design-as-a-service
- Artisanal café catering to hyperlocal needs

Day Care is a macro-level unlock for female labour force participation as an industry for women, by women and requires significant attention to be developed

3 sub-sectors identified as where-to-play areas for mass entrepreneurship:



Day-school and pre-school

- 40-50% gap in current day-care system for working mothers
- Corporates augmenting demand for day-care support
- Franchising model picking up however struggle to find quality educators for the business
- Aspiration for curriculum-based learning driving formalization
- Day-care needs of low-income households largely unmet

Lighthouse ideas:

- Scaling small, independent daycares
- Social enterprises for children from low income families
- Home-based care-giving hyperlocal setups for <10 kids



Vocational training

- Large workforce additions expected in next few years in India however only ~5% goes through formal training
- Limited emphasis on digital or entrepreneurial skills in formal curriculum
- Informal / apprentice model is prevalent, however non-standardized & inefficient
- Affordable, hyper-local skilling models with good curriculum are effective
- Increased maturity & support from govt. interventions in the sector

Lighthouse idea:

- Localized skilling institutes to create entrepreneurs in women-dominated sectors (eg beauty and wellness)



Afterschool supplementary education

- Increase in enrolments from first-generation school goers (low-income segment) with need for after-school support
- Increasing awareness on deficiencies of rote learning in our schools
- Further widening of the demand-supply gap in teachers in public schools
- Ed-tech paired with live interactive model opening up new opportunities for home-base tutoring
- Increase in inter-state migration creating need for training in language

Lighthouse ideas:

- Supplementary education, emphasis on non-rote learning
- Independent home tutors with ed-tech to impart language & math to 1-8 grades
- Scaling career counselling setups; Franchisee of big-ticket test-prep player

India is still largely a patriarchal society with an orthodox belief system. In this background, entrepreneurship is an expression of empowerment, passion, and an aspiration to achieve a better work life balance. There is pressure in taking the first step, with friction between organized and unorganized players. Currently available resources are under-utilized, with women largely averse to taking loans, and lack of awareness on avenues of financing. Those who do take debt are under great pressure to deliver. Reputation is everything, building a brand is imperative and there are many complexities like competition, unskilled employees & more.



Food – barriers to scale

- Fragmented advisory (govt. & pvt)
- Inhibition to step out leading to poor recognition of business opportunities
- Less attention to areas like hygiene, preservation & at times even operational efficiency & unit cost optimisation
- The lower you go in the socio-economic strata, the higher the averseness to take debt & scepticism to start out on their own
- Lack of coordination between government and social organizations, financiers and women entrepreneurs
- Weak support system of mentors and advisors that is imperative to growth



Education (day-care, beauty & wellness TVET) – barriers to scale

- Cheaper alternatives flooding the market are diluting price and value
- Poorly trained entrants make it difficult for new outfits to deliver quality.
- Gaps in regulations and poor trainings in the day-care space, finding partners, employees, admin and staff to run and scale operations. No centrally governed certification/accreditation or skilling & training
- While the spends on beauty and wellness services are increasing, it is mainly in the at-home services category. Walk-ins are reducing, price wars increasing
- The social sector needs to come together to support children from low-income groups



Skills

- Boost **Peer-to-peer connections** & learning amongst entrepreneurs, crucial for imparting sensitive / trust-led learnings
- Disseminate **success stories** of entrepreneurs with relatable personas (overall perception that failure stories spread faster)
- Compilation and access to best-of-breed **'curriculum'** and **curated resource library** for knowledge dissemination. **Leverage partners** / ecosystem to keep this knowledge current and well-curated



Demand and Market Linkages

- Connect and champion for **value chain stakeholders** needed for successful business eg demand aggregators
- Facilitate **access to small-scale demand** for learning & experimentation e.g. pop-up kitchens in housing societies for home chefs, home-based skilling for beauty
- Establish **interactive marketplace to discover** corporate demand and to augment interactions with demand generators for common understanding of needs
- Build an efficient **'registry' of entrepreneurs & subsequent clearinghouse of local supply and demand** e.g. mom-and-pop bakeries needing local home-based chefs, local corporate demand in cafeteria



Financial and Business Model Support

- Enable entrepreneurs build **clear business plans** basis needs & aspirations; Increase awareness on **business model options & pros and cons**
- **Unbundle components** (esp. areas of high CAPEX) for better unit economics of entrepreneur e.g. 'WeCook' for chefs to access better equipment, 'WeSpace' for govt. school space for low-cost day-cares
- Advocate for **macro-level govt support and policy** changes e.g. affordable day-care, emphasizing entrepreneurship content to NSDC curriculum, certifications and regulations. **Unlock and demystify** govt. support for entrepreneurship e.g. navigating the Mudra loans process, marketplace, aggregation
- Develop **co-operative models**, added benefit from working as a group



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Textile, food, personal services and education account for 65% of women-owned businesses in urban India

Sectors	Women owned businesses, 000, number of urban enterprises	As proportion of woman-owned businesses ¹ % of all urban women owned businesses	As proportion of the sector, % of all urban businesses in the sector
Textile	680	27%	17%
Food	550	22%	10%
Personal services	250	10%	13%
Education	120	5%	20%
Transport & storage	60	2%	4%
Health	50	2%	10%
Tourism	10	1%	7%
Others	850	31%	10%
Total	2,810	100%	11%



Insights

- Though women-owned businesses are prevalent in textiles, large proportion likely to be contract / low-value outsourcing related businesses e.g. tailoring shops
- Similarly personal services has low-value businesses like dry-cleaning & funeral services
 - Beauty is a strong opportunity here growing at 20%+ with dominance of women
- As expected, food and education are top sectors for women businesses

Sector definitions (indicative only): Textile: Manufacturing of wearing apparel, footwear, crocheted apparel, retail sale of apparel, etc., Education: Primary, secondary and higher education, vocational training, education counselling, tutoring services, etc., Food: Restaurants, manufacture of beverages, food and dairy products, grocery stores, mobile food service, etc., Health: Hospitals, clinics, nursing care, residential care, etc., Personal services: Beautician services, funeral services, dry-cleaning services, repair of computers and household goods, etc., Tourism: Tour operators, travel agencies, hotel accommodation, etc.

¹ Distribution of women owned businesses, not including agriculture and construction



These sectors along with health account for 70% of formal and informal women employment in urban India

Sectors	Women employed '000, number of women employed in urban businesses	Distribution of woman employed ¹ % of all women employed in urban businesses	Women employed in the sector, % of all people employed in urban businesses
Textile	2,200	18%	21%
Education	2,000	17%	48%
Food	2,000	17%	16%
Health	900	7%	39%
Personal services	700	6%	19%
Tourism	100	1%	16%
Others	4,200	35%	15%
Total	12,100	100%	19%



Insights

- Of 33 million² working women in India (formal & informal), 12 million are employed in urban businesses with 70% in top 5 sectors
- For food and education, employment levels are much higher than entrepreneurship levels – natural tailwind for entrepreneurship in this space**

Sector definitions (indicative only):

Textile: Manufacturing of wearing apparel, footwear, crocheted apparel, retail sale of apparel, etc.

Education: Primary, secondary and higher education, vocational training, education counselling, tutoring services, etc.

Food: Restaurants, manufacture of beverages, food and dairy products, grocery stores, mobile food service, etc.

Health: Hospitals, clinics, nursing care, residential care, etc.

Personal services: Beautician services, funeral services, dry-cleaning services, repair of computers and household goods, etc.

Tourism: Tour operators, travel agencies, hotel accommodation, etc.

¹ Distribution of women employed across sectors, not including agriculture and construction. Numbers do not add up to 100% due to rounding off. | ² Data as of 2013-14, from the 6th Economic Census of India

SOURCE: 6th Economic Census data



In contrast, Agriculture is the top sector for women employment in rural India

Sectors	Women employed '000, number of women employed in rural businesses	Distribution of woman employed ¹ % of all women employed in rural businesses	Women employed in the sector, % of all people employed in rural businesses
Agriculture	8,250	40%	39%
Education	3,000	14%	45%
Food	2,600	13%	21%
Manufacturing	2,100	10%	29%
Textile and apparel	1,600	8%	31%
Personal services	600	3%	18%
Others	2,350	12%	20%
Total	20,500	100%	19%



Insights

- Top 5 sectors account for 85% of all women employed in rural India
- Agri-business (upstream sector) likely having strong overlap with food

Sector definitions (indicative only):

Textile: Manufacturing of wearing apparel, footwear, crocheted apparel, retail sale of apparel, etc.

Education: Primary, secondary and higher education, vocational training, education counselling, tutoring services, etc.

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Health: Hospitals, clinics, nursing care, residential care, etc.

Personal services: Beautician services, funeral services, dry-cleaning services, repair of computers and household goods, etc.

Tourism: Tour operators, travel agencies, hotel accommodation, etc.

¹ Distribution of women employed across sectors, not including agriculture and construction. Numbers do not add up to 100% due to rounding off. | ² Data as of 2013-14, from the 6th Economic Census of India

SOURCE: 6th Economic Census data



6 megatrends will shape the future of demand going forward

1

Consumption driven by strong & emerging middle class

By 2030, 140mn additional households will move into middle class and spend 2-2.5x on essential categories



2

Steady urbanization combined with increased rural consumption

By 2030, 40% of Indians will live in urban areas with a 3.5x increase in per capita consumption



3

Technology will create new delivery models; automation will disrupt existing operations

Business models such as shared services and digitized services for well-being will be especially relevant in the future; ~6% of 2030 workforce will change occupational groups driven by automation



4

Strong tailwinds for women at work

Though women participation in workforce has dropped, ~10 million women to be added to the workforce by 2030; multiple MNCs driving women recruiting programs



5

Preference for niche Indian flavors

Consumption patterns will be shaped by Indian characteristics, especially in the food, beverage, personal care products



6

Increasing health consciousness will factor into consumer preferences

Within retail, categories of organic food and sportswear are growing at 20%+



Food & Education: Highest economic potential, Easy-to-start business models

Sectors Descending priority	GVA 2025, INR Cr	Historical growth	Headwinds & Tailwinds	Easy to start business models
Food 	800 K	15%	<ul style="list-style-type: none"> ↑ Increasing disposable income leading to rise in eating out / ordering in <ul style="list-style-type: none"> — Restaurants and catering services market is growing at 10% every year ↑ Strong technology tailwinds opening up new business models ↑ Evolving consumer preferences disrupting the market in favor of small-scale enterprises <ul style="list-style-type: none"> — 50% of the biscuits and snacks market is traditional snacks, growing at ~30% CAGR (vs. packaged food at 12%) 	<ul style="list-style-type: none"> ▪ Cloud/ home based kitchens to provide home-cooked meals ▪ Home-made snacks / RTE for B2C or B2B consumption ▪ Artisanal / gourmet products e.g. baked goods for niche food retail
Education 	300 K	19%	<ul style="list-style-type: none"> ↑ Rising aspiration of parents for first-rate services especially with pre-primary education <ul style="list-style-type: none"> — School enrollments decreased by 13 Mn in government schools, and increased by 17 Mn in private schools ↑ High govt. momentum e.g. increasing school enrolments providing tailwinds <ul style="list-style-type: none"> — 96% enrollment in primary and secondary education ↑ EdTech and automation are likely to increase self-employment requirement ↓ Gradual decline in fertility rates likely to lead to consolidation of education enterprises going forward 	<ul style="list-style-type: none"> ▪ Home-based affordable day care ▪ Ed-tech based tuition provider ▪ Home / small-scale based vocational training e.g. beauty, food processing

Economic potential & trends in other sectors (1/2)

Sectors Descending priority	GVA 2025, INR Cr	Historical growth	Headwinds & Tailwinds	Easy to start business models
Personal services (incl. beauty) 	150 K	13%	<ul style="list-style-type: none"> ↑ Current penetration of beauty services is low, but has high growth potential with young & rapidly urbanizing population, leading to an 18.6% CAGR of the beauty and wellness industry in India ↑ Low barriers to success for entrepreneur (e.g. with skill & CAPEX needed) <ul style="list-style-type: none"> — 50% of the workforce in beauty and salons has completed up to secondary level of education ↑ Surge in wellness tourism, with India among the top ranked countries globally 	<ul style="list-style-type: none"> ▪ Beauty salon cum training institute for providing skilled workers for the growing industry
Textile & apparel 	300 K	13%	<ul style="list-style-type: none"> ↑ Rising demand for traditional, hand-woven wear with customized designs ↑ Strong export focus <ul style="list-style-type: none"> — India is the second largest exporter of textiles in the world, driven by growth of export of home textiles (8.3% growth rate vs 6.9% of overall textile industry) ↓ Increasing automation in the industry to increase productivity and reduce costs <ul style="list-style-type: none"> — Growth largely from mass-produced apparel e.g. children & sports wear 	<ul style="list-style-type: none"> ▪ Contract business e.g. tailoring shop for garment aggregators (low-value business model) ▪ Fashion selling through influence e.g. Instagram (high-risk model)

Economic potential & trends in other sectors (2/2)

Sectors	GVA 2025, INR Cr	Historical growth	Headwinds & Tailwinds	Easy to start business models
Descending priority <div style="background-color: #ADD8E6; padding: 10px; border: 1px solid #ADD8E6;"> <p>Health</p>  </div>	200 K	19%	<p>↑ Increased spending on treatment for lifestyle diseases</p> <ul style="list-style-type: none"> – 50% spend on in-patient beds is for lifestyle diseases <p>↑ Healthcare technology is increasingly improving access to high quality medical care</p> <ul style="list-style-type: none"> – The home healthcare market is estimated to reach USD 6.21 billion by 2020 – The telemedicine market is expected to grow at 20% till 2020 	<p>▪ Few easy models for entrepreneurs without heavy licensing, financing requirements</p> <ul style="list-style-type: none"> – Vocational skilling for lower order hospital tasks e.g. duty assistant is an option

Top 6 states account for 50%+ of food & education enterprises in India



Insights

- Of ~15Mn enterprises in food & education, ~7.5 million are in 6 states (state-wide data, rural + urban)
 - 780k of these are owned by women (~55% of total 1.5 million women-owned enterprises)
 - These states also have high women employment in food and education (4.7 Mn women vs. total 9.4 Mn working women in India)

Potential ~900K addl urban women entrepreneurs in Food+Education by 2025 GLOBAL ALLIANCE FOR Mass Entrepreneurship

Sectors
Descending priority

Presence of women

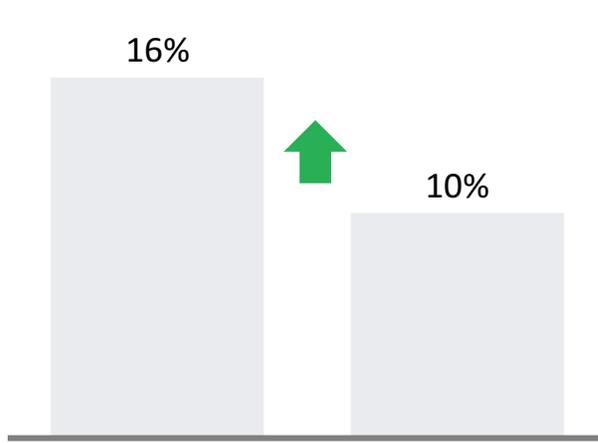
% of total employment and entrepreneurs in the sector

Sub-sectors with relatively easier to start businesses

e.g. low CAPEX, social networks, mobility

Theoretical potential*

Food

Includes:

- Pickle and jam makers, butcher shops, etc.
- Caterers, restaurants, food trucks and juice centers, etc.

Excludes:

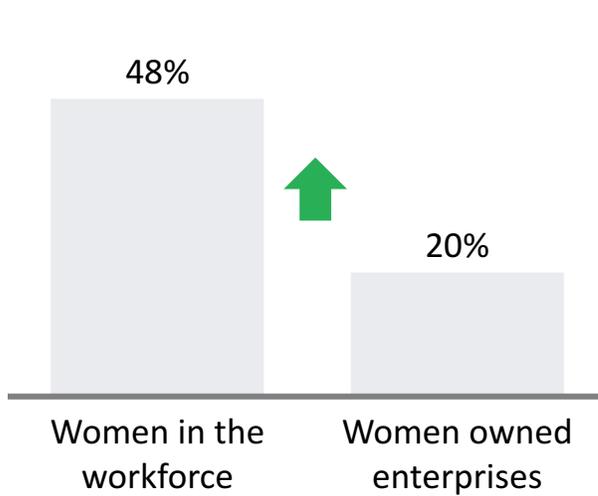
- Grocery shops and flour mills
- Manufacture of milk-powder, cream, etc.

At current rates, # new urban enterprises by 2025¹: 10Mn with 1 Mn women-owned

550 – 650 K

*# additional entrepreneurs in these sub-sectors by 2025: If employment and entrepreneurship levels were equalized through interventions

Education

Includes:

- Tutoring centers, exam preparation courses,
- Dance classes, painting lessons, sports classes, etc.

Excludes:

- Primary, secondary and higher education institutions
- Vocational training institutions

At current rates, # new urban enterprises by 2025¹: 1Mn with 200k women-owned

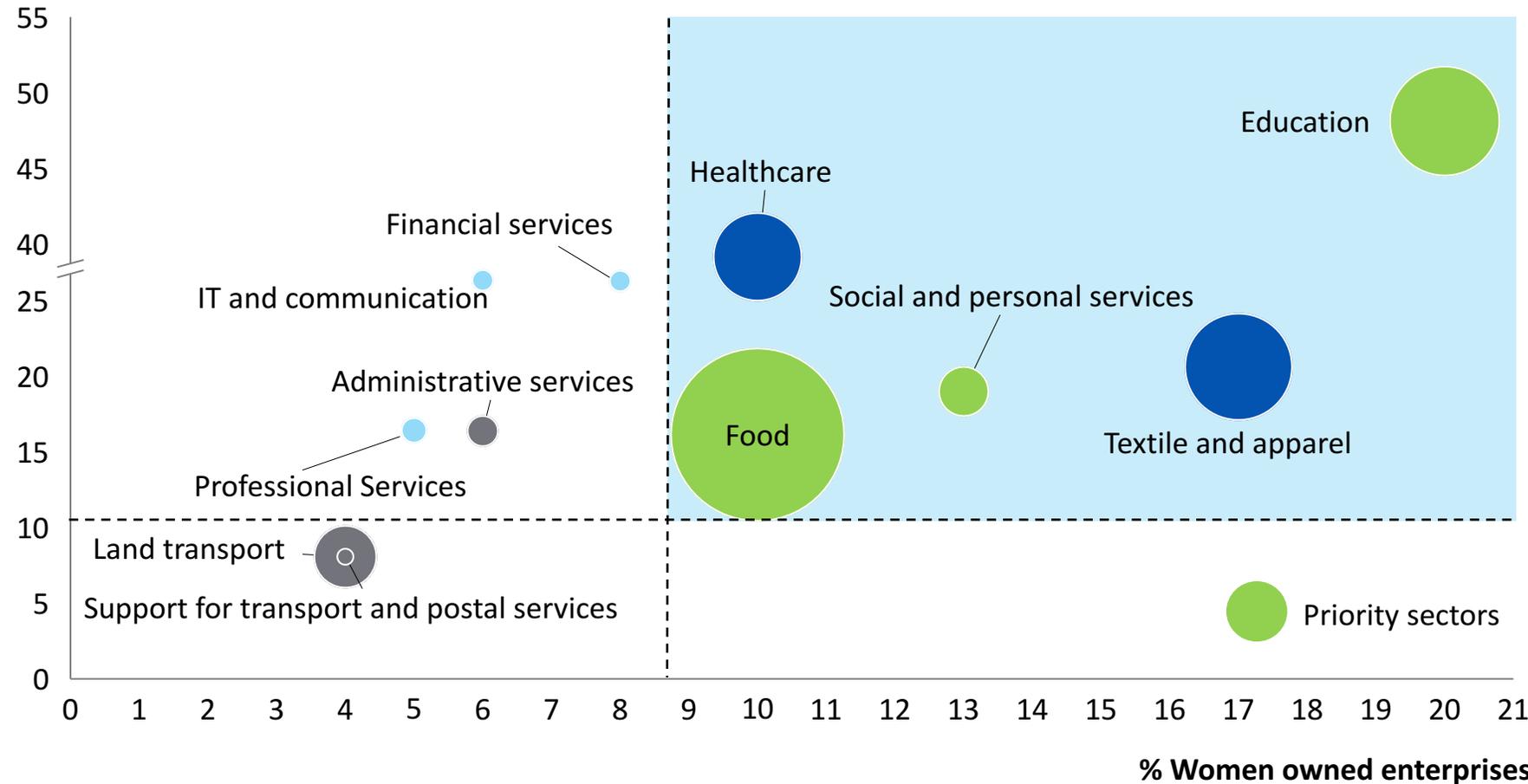
200 – 250 K

¹ Estimated number of enterprises in 2025 at 5% CAGR. CAGR calculated based on the growth of number of enterprises between the 5th and 6th Economic Census.

Summary of sector prioritization

% Women workforce

Size of bubble: GVA [INR Cr] in 2025

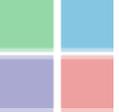


Key insights

- Textile & apparel; food services and education dominated by women owners
- They account for **30%+ of GVA** of urban enterprises (**INR 7.6 lakh Cr**)
- **45%+** of the **urban female workforce** employed in top 3 sectors (**59.5 lakh women**)
- **Food and Education** have strong headwinds & tailwinds, ease of starting business, present high economic growth conducive to mass entrepreneurship
- Potential **~900K new urban women entrepreneurs** in Food and Education by 2025

Notes:

1. GVA is the value of goods and services produced less the cost of all intermediate consumption that are directly attributable to that production.
 2. Textile and apparel includes manufacture of textile and apparel, retail sale of apparel; Education includes primary, secondary and higher education, coaching centers, pre-schools, cultural education, career counselling. etc.; Food includes manufacture of food products, manufacture of beverages and food and accommodation services and retail sale of food products; Healthcare includes clinics, nurses, etc.; Social and personal services includes dry-cleaning, beauty treatment, pet care, household maintenance, etc.
 3. Sources: All India Report of Sixth Economic Census; Economic Characteristics of Unincorporated Non-Agricultural Enterprises (Excluding Construction) in India, Report No. 582; Growing Opportunities Food Market, Flanders Investment & Trade Market Survey
 4. Green bubbles indicate high priority sectors, with high GVA, women owned enterprises and women employment. Dark blue bubbles indicate 2nd priority sectors with low GVA, but large proportion of women owned enterprises and women employment in the sector. Light blue and grey bubbles indicate low priority sectors with low GVA, low level of women owned businesses and low women employment in the sector



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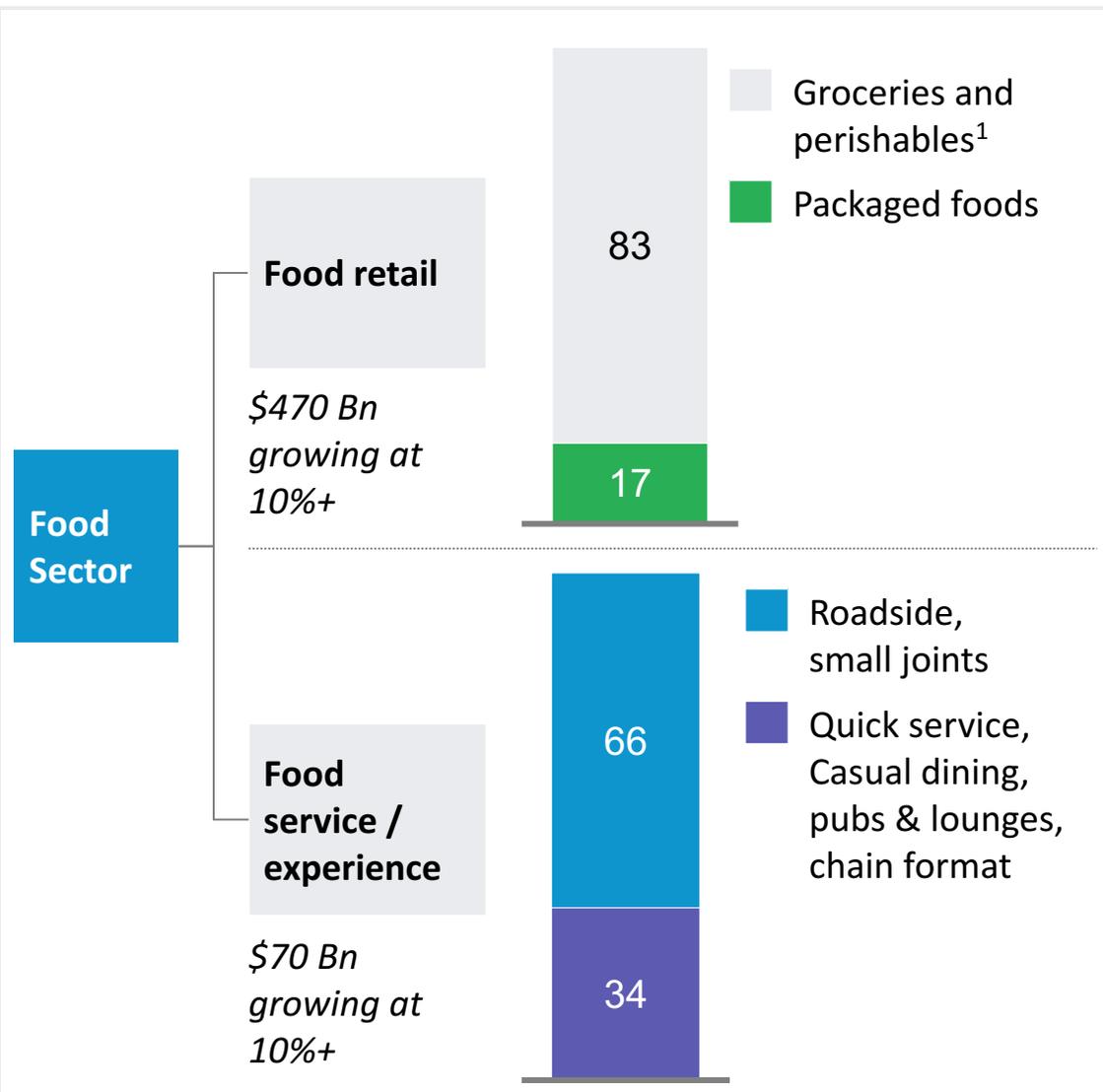
Recap - Why food?

- **One of the largest sectors** in India (exp. INR 800K Cr GVA by 2025)
- Growing at **10-15%** per annum with some segments e.g. online ordering growing 20%+
- **550K enterprises owned by women** (22%¹ of all women-owned enterprises)
- **2Mn women working** in this sector
- **Various easy-to-start businesses** that require low investment & offer flexible work schedules

¹ Not including agriculture and construction

Food landscape in India and sectoral trends in food

Food landscape in India, 2018



Mega trends in Food

1 Demand for organic produce driven by high-income urbanites

- 15%+ CAGR (vs. 10% overall industry) on organic foods especially sugar, oilseed, cereals
- Strong ecosystem built e.g. 9th globally in area under organic cultivation



2 Artisanal foods / growing driven by eating out aspirations

- Growing number of uses cases e.g. La 15, Lavonne Bakery, Raw Pressery



3 Inclination towards home, healthy cooked meals

- Driven by more nuclear families & working women in cities



4 Digitization & new business models emerging

- E.g. Swiggy grew 200%+ last year
- Rise of cloud kitchens leading to reduced entry barriers for entrepreneurs

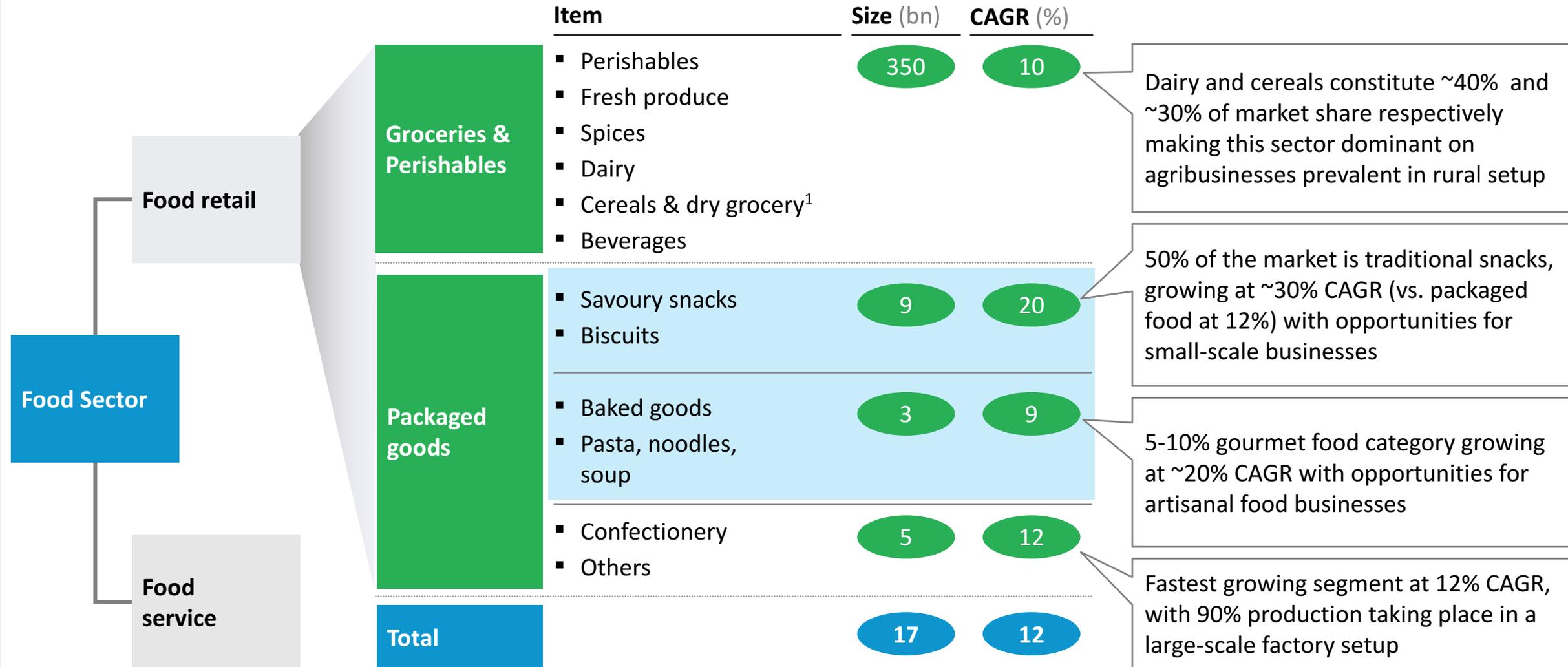


Note: Kirana (“mom-and-pop stores”), general stores, street markets and convenience stores

SOURCE: Consumer expenditure, Euromonitor 2018, Flanders Report, India’s food service report, FICCI report- changing landscape of retail food industry, India Food report 2018, India Food Forum, web search, team analysis

In Retail, packaged food categories within small enterprises grew at 20%+

Food landscape in India



¹ Includes cereals, grains, sugar, edible oils and dry fruits

5 trends in packaged food that are driving demand for entrepreneurs

Mega trends

1 Rise in snackification as the 'fourth meal' with preference for regional & healthy

- Increasing meal moments in a day with 60% Indian consumer snacking 2+ times/day.
- Consumers looking for healthy alternatives to classic fried potato chips e.g. baked nachos, dehydrated vegetable chips, roasted / baked products.
- For e.g. the veggie chip market is growing 15%+
- Innovative business models emerging like Snackible offering a subscription model
- Traditional snacks growing faster for e.g. Indian namkeens alone are growing faster (~22-25%) as compared to western snacks growing ~12-15%.
- Regional companies to grow 2x as fast as MNC's mainly due to better quantity per pack (10-30% higher) and local flavors.

2 Growing demands for ready-to-cook meals among urban consumer

- Driven by working women replacing cooking with healthy options (esp. breakfast occasion)
- Mushrooming of several options in this space e.g.. iD Dosa batters, BB Good diet Kodo, Millet Rava Dosa and Health Drink Millet Vita
- Further momentum from macro-economic factors due to rise in dual income households, nuclear families, long work hours, increasing travel time and high disposable income

Demand Insights

“ People have moved from 3 meals a day to 5 mini meals, creating opportunity for 4pm snacks”

– Industry Expert

“We created a new category for nutritional goods under BB good diet because of increasing demand”

– Head Buying and Merchandising - Big Basket

5 trends in packaged food that are driving demand for entrepreneurs

Mega trends

3 Return of the authentic, Indian palette

- Economic migrating leading to customers seeking comfort in familiar products
- Few brands like Paper Boat with nostalgia factor doing well e.g. beverage launched flavors commonly consumed at home, like jamun, raw mango
- Categories like Khakra, makhana, chikki being branded & re-packaged successfully e.g. Too Yum
- Online retail models basis authentic India flavors thriving For e.g. 'Place of Origin' delivers 100+ brands from 20 states. 'Flavors of my city' aggregates products from 250 stores across India e.g. Panchhi petha from Agra

4 Aspiration for curated, artisanal foods across categories

- Numerous bakeries mushrooming in urban centers - fastest growing segment (20-25%) led by home chefs with talent in artisanal dessert making
- Several other categories being gourmet-ified – e.g. lentils, bread, cheese.
- The Gourmet Box selling 173+ products across 23 categories through regular and monthly subscription model.
- Bangalore based Begum Victoria, producing high quality cheeses and selling ~ 1,500 kilos p.m.
- Customers looking for a healthy, no-preservative product. Retail chains e.g. Nature's Basket importing products to meet this demand

Demand Insights

" We have more than 200 varieties of snacks on our website. A team curates regional flavors and we tie up with the best vendors from different cities"

– Team, Flavors of my city

" I make every batch myself to ensure utmost quality and taste. My products has more dry fruits than granola as customers are actively seeking for healthy breakfast options "

– Founder - Cocosutra

5 trends in packaged food that are driving demand for entrepreneurs

Mega trends

5 Rise in health-conscious consumers (but no compromise on taste)

- New product categories like BigBasket Good diet becoming popular as a result of changing lifestyles and increasing focus on wellness
- Health conscious consumers not ready to compromise on taste . Too Yumm product range offers 'baked not fried' goods with '40% less fats' making them the healthier snack option, without compromising on flavor and taste.
- Organic packaged food market also picking up – driven by increasing awareness & new product offerings like Farm2Kitchen, Organic Shop, Naturally Yours and Organic India.

Demand Insights

“There is an increasing demand for healthy foods. I have seen a lot of new brands entering this space. Because of demand, they are ready to pay the high listing fee

– Director, MK Retail

Emerging lighthouse ideas in packaged foods

Lighthouse ideas

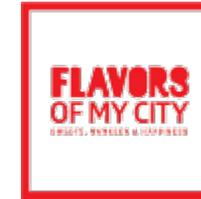
- 1 Prepare **homemade snacks** catering to growing retailer demands. - Retailers aggregating snacks, ready to cook meals from vendors forming categories like BB Good diet

- 2 Similar to snacks, prepare **fresh variants of ready to cook food products** with additional focus on packaging, storage etc..

- 3 Prepare **artisanal and gourmet food** like breakfast cereals, bakery goods for online channels / influence selling

- 4 Farm, aggregate and / or distribute **organic products** through aggregators like Farmizen, Organic Mandya

Successful entrepreneurs



Snackible



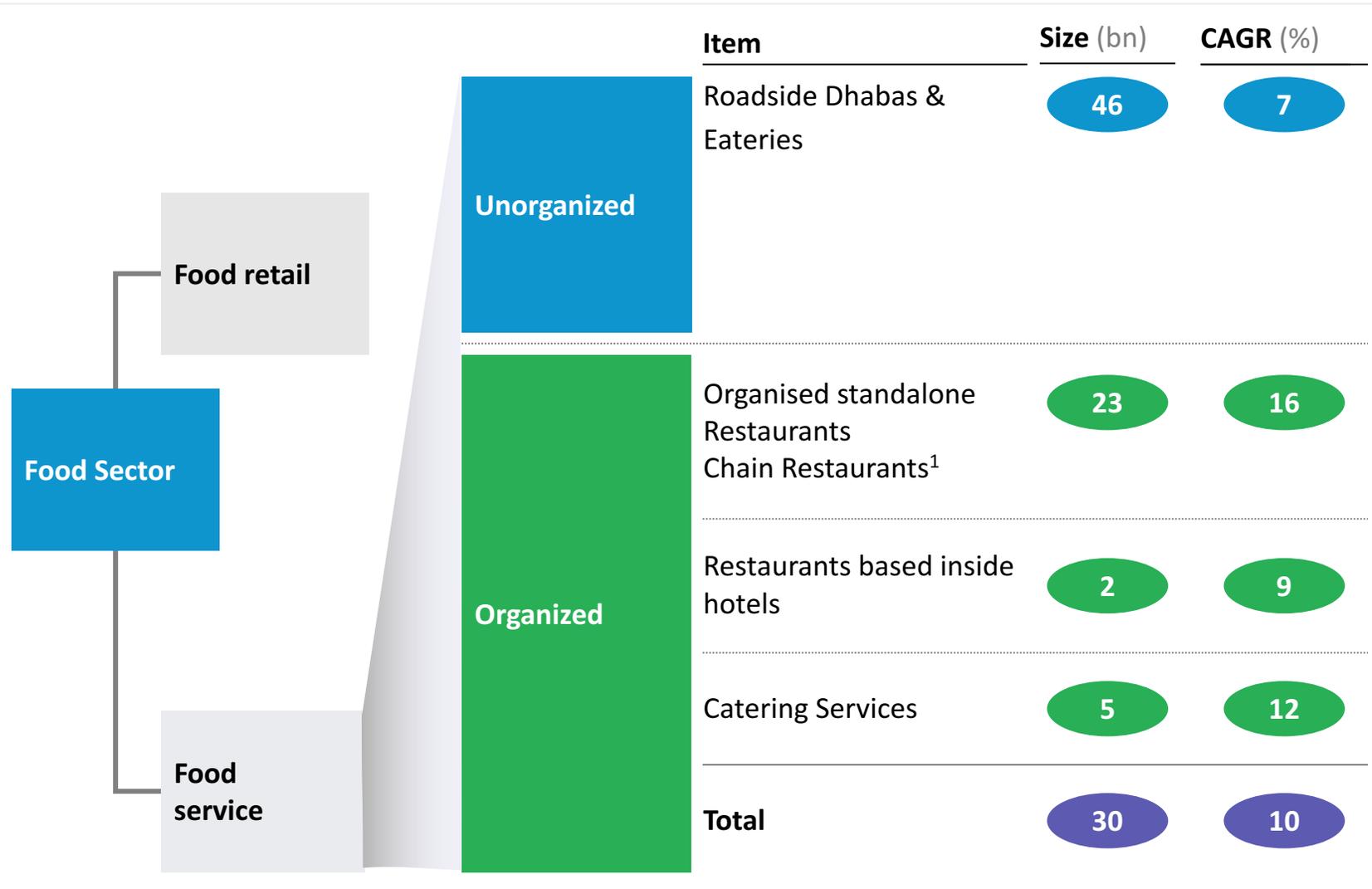
cocosutra™



farmizen

Organized food service market growing at 10% CAGR

Food landscape in India



Key Insights

- Organized market growing at 10% CAGR due to changing consumption patterns and rising demand for convenience
 - QSR segment growing (~22%)
 - Online food ordering is growing at 20%
- Food tech continuing to **'organize the unorganized'**. Cloud kitchen format becoming popular as operational costs and risk of closure increasing
 - Faasos has 160+ kitchens in India
 - Zomato invested US\$15 million in Loyal Hospitality.
- Catering likely dominated by large-scale contracts (e.g. corporate canteens, hospitals) however small-scale e.g. party, occasion based catering also on the rise

¹ Includes: Quick Service Restaurants (QSRs) , Casual Dining Restaurants , Cafes, Frozen Dessert / Ice Cream Parlors (FS/IC) , Pubs, Bar Cafes & Lounges (PBCLs)

5 trends in food services & experiences driving demand for entrepreneurs

Mega trends

1 Eating out continues to rise amongst urban millennials

- Eating out continues to be a strong trend among millennials, with use of functional kitchen going down drastically. 60% of them eat out 3 times a month
- Impact felt across occasions – i.e. breakfast, lunch and dinner moving gradually to ready to cook/eat meals, employer-provided lunches and eating-out respectively.
- QSR category also growing at CAGR 20%+ given low price point & convenience factor

2 Rising online orders with preference for home-cooked meals (with no compromise on price point & speed of delivery)

- Consumers demanding home-cooked nutritional meals in a hyperlocal setup. For e.g. Startups like Masalabox providing homemade tiffin services and Foodybuddy building neighbor-food network
- Food tech companies launching private labels in this space for e.g. Swiggy launched Homely and The Bowl Company
- Low price point of home cooked meals making it attractive e.g. Swiggy daily launched Homestyle meals through subscription model with zero delivery cost.

Demand Insights

“Most of our consumers are bachelors, married couples without kids, who have only one meal at home. Therefore there is a need to provide healthy options that match their price point and delivery time”

– Swiggy general manager

“We want to reduce the average unhealthy calories consumers eat and provide healthy options that consumers can order daily”

– Swiggy daily business head

5 trends in food services & experiences driving demand for entrepreneurs

Mega trends

3 Food tourism rising as Indian cuisine gains popularity

- Indian cuisine becoming the rage of overseas palates - Foreign travelers spend 30-40%¹ budget on culinary-related experiences in India

4 Occasional celebrations generating demand for new age catering

- Increasing social get-togethers at home creating demand for bulk orders and customized catering services. For e.g. Fresh Menu introducing new combo menus like The Party Starter Combo
- Certain foods like Biryani growing fast on back of this trend (e.g. Biryani was the most ordered dish on Swiggy in 2017). Estimates value of the organized biryani delivery industry is ~ INR2,500 crore. Behrouz Biryani, Biryani by Kilo and the Biryani Project are a result of this trend

5 Increasing trend of experimenting new cuisines

- Rise in ethnic cuisine across organized and hygienic set-ups. Haldiram and Bikanervala inspiring many unorganized players to move to quick-service restaurants format. For e.g. Goli Vada Pav which has 300+ stores across 100 cities

Demand Insights

“I host people at my home for special Andhra cuisines in a pop-up format”

– Home chef entrepreneur

“Employers are becoming very picky about the menu. They want to make sure that there is variety, nutrition and taste”

– Head, Catering services

¹ Foreign Tourist Arrivals

Emerging lighthouse ideas in food services and experience

Lighthouse Ideas

- 1 **Cloud / home based kitchens** to provide home-made meals
Community kitchens preparing different 'home-style' cuisines to improve reliability / efficiency

- 2 **Cooperative canteens and catering units** to provide services to corporates/events and catering for occasions like parties and gatherings

- 3 **Culinary experiential tours and services** for pop-up dining at home or learn to cook offerings e.g. the Bohri kitchen

- 4 **Online/offline vocational training and workshops** for budding cooks, home-chefs, Design-as-a-service studios for branding and marketing

- 5 **Artisanal café** catering to hyperlocal needs

- 6 **Cooperative cafes** selling ethnic delicacies e.g. Café Kudumbashree

Successful entrepreneurs



DANDA FOOD PROJECT



Map of lighthouse ideas in the Food sector

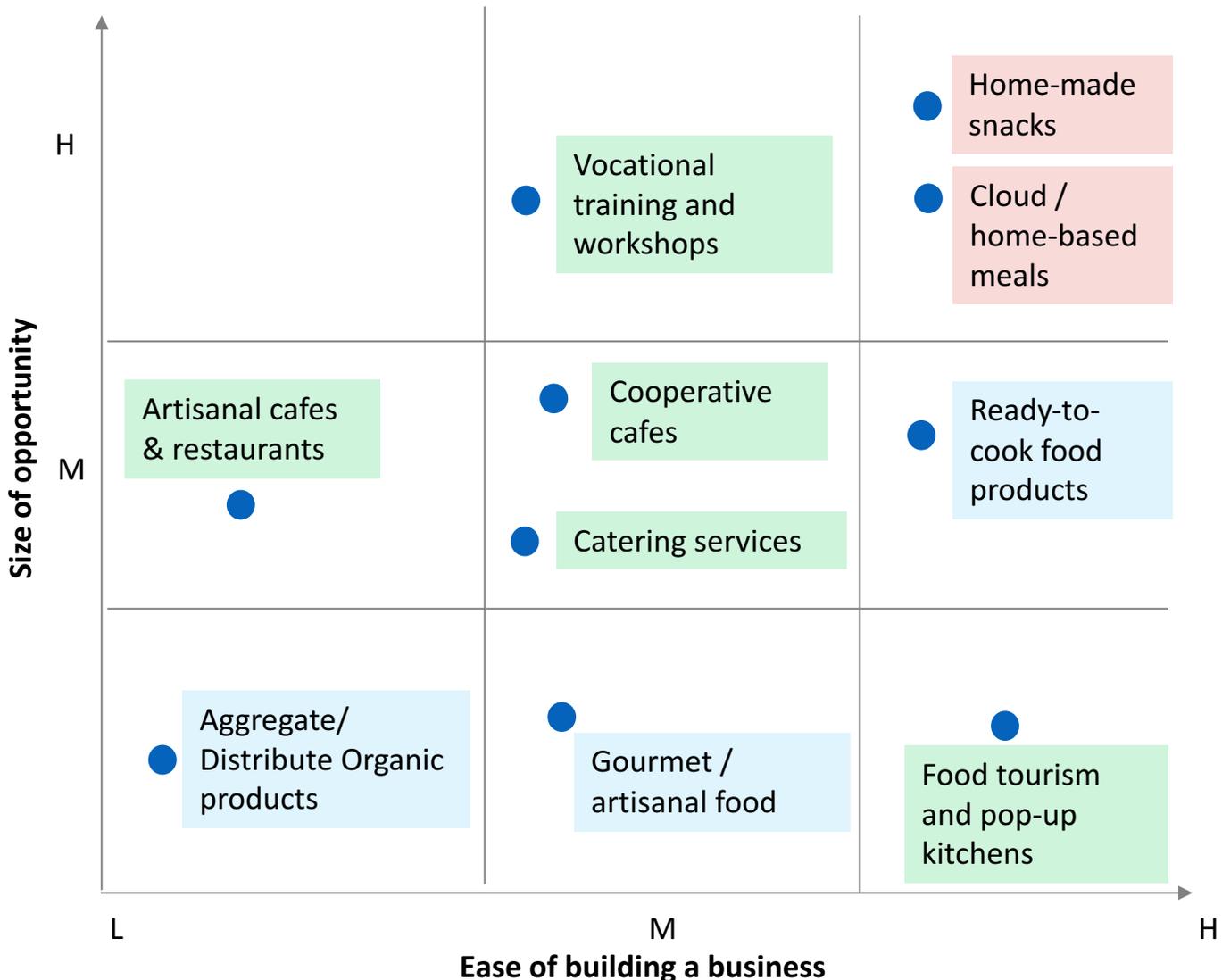
Prioritization criteria

Ease of building business:

- High capex required
- Ease of customer acquisition
- Skillset and domain expertise needed

Size of opportunity:

- Size of market
- Growth rate
- Prevalence of small scale business



Key Insights

- **Preparing snacks is a top white space**
 - Large opportunity (\$2.5 Bn traditional snacks market)
 - Demand from retailers e.g. BigBasket Good Diet for reliable suppliers
 - Relatively easy to prepare at home / small-scale setup (however brand-building, packaging and shelf-space are challenging)
- **Cloud kitchens for home-based meal preparation also a strong play**
 - Expected to grow in the \$2-3 Bn food delivery space
 - Demand from aggregators e.g. Swiggy Daily, Masalabox for reliable suppliers
 - Relatively easy to prepare, lesser need for preservatives & packaging

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- Backup





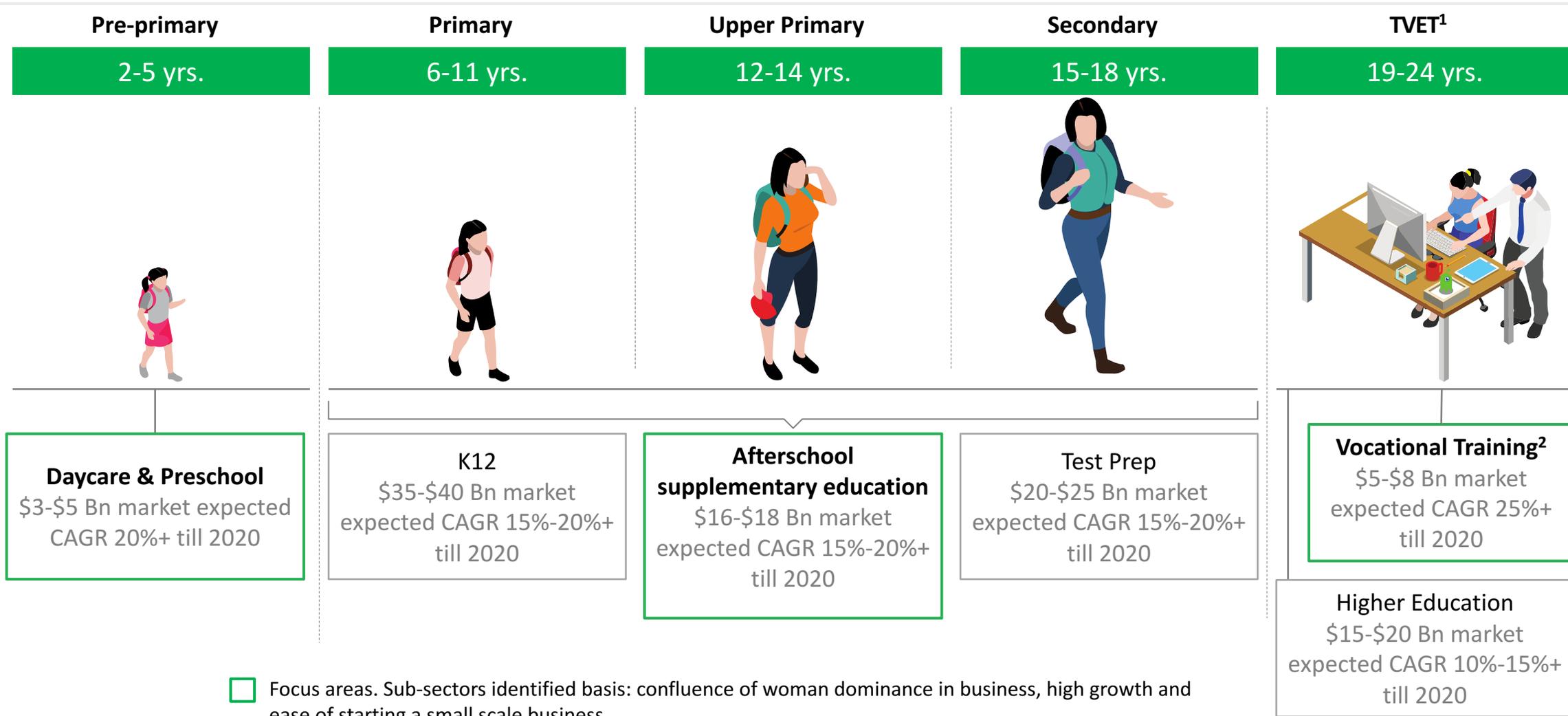
Recap - Why Education?

- Sector estimated to reach **INR 300K Cr** in Gross Value Added by 2025
- **High growth** sector with 15-20% growth across segments (among the highest in the country)
- **Prevalence of women owned businesses** - 20%¹ urban enterprises owned by women (highest among all sectors in urban India)
- **High women labor base** - ~48% of all employees in this sector are women (highest proportion amongst sectors)

¹ Not including agriculture and construction

3 sub-sectors identified as where-to-play areas for mass entrepreneurship

Journey of Indian learner



1 Technical and Vocational Education and Training (TVET)

2. Segments like beauty & wellness, textile, handlooms and handicrafts are women dominated

Day care & pre-school - 5 mega trends driving demand for entrepreneurs

Mega trends

- 1 40-50% gap in current day-care system for working mothers**
 Women workforce expected to increase to 150mn (2030) with low-income jobs like construction, retail etc.. biggest drivers

- 2 Corporates augmenting demand for day-care support**
 Push for women at work & govt. regulation driving setup of on-site creches / related models

- 3 Franchising model picking up however struggle to find good educators for the business**
 High margins & lack of regulations triggering entry of entrepreneurs with lower credentials / skill set to run day cares (may not meet expectations on quality)

- 4 Aspiration for curriculum-based learning driving formalization**
 Parents' wish to have children ready for primary school – focus on learning outcomes from day cares

- 5 Day-care needs of low-income households largely unmet**
 Anganwadi system proving ineffective on several counts including parental aspiration, day care needs of this segment especially on affordability, workplace proximity & vernacular medium unmet

Demand Insights

">45% of our preschools are located as on-site centers in big corporates"

– Founder, KLAY

"I do not believe in franchisee model as I am worried about brand dilution by entry of non-educationalists"

– Founder, Independent preschool

"There is no reliable and affordable preschool near my workplace and I cannot take my daughter there. I have to leave her back in my hometown with my in-laws"

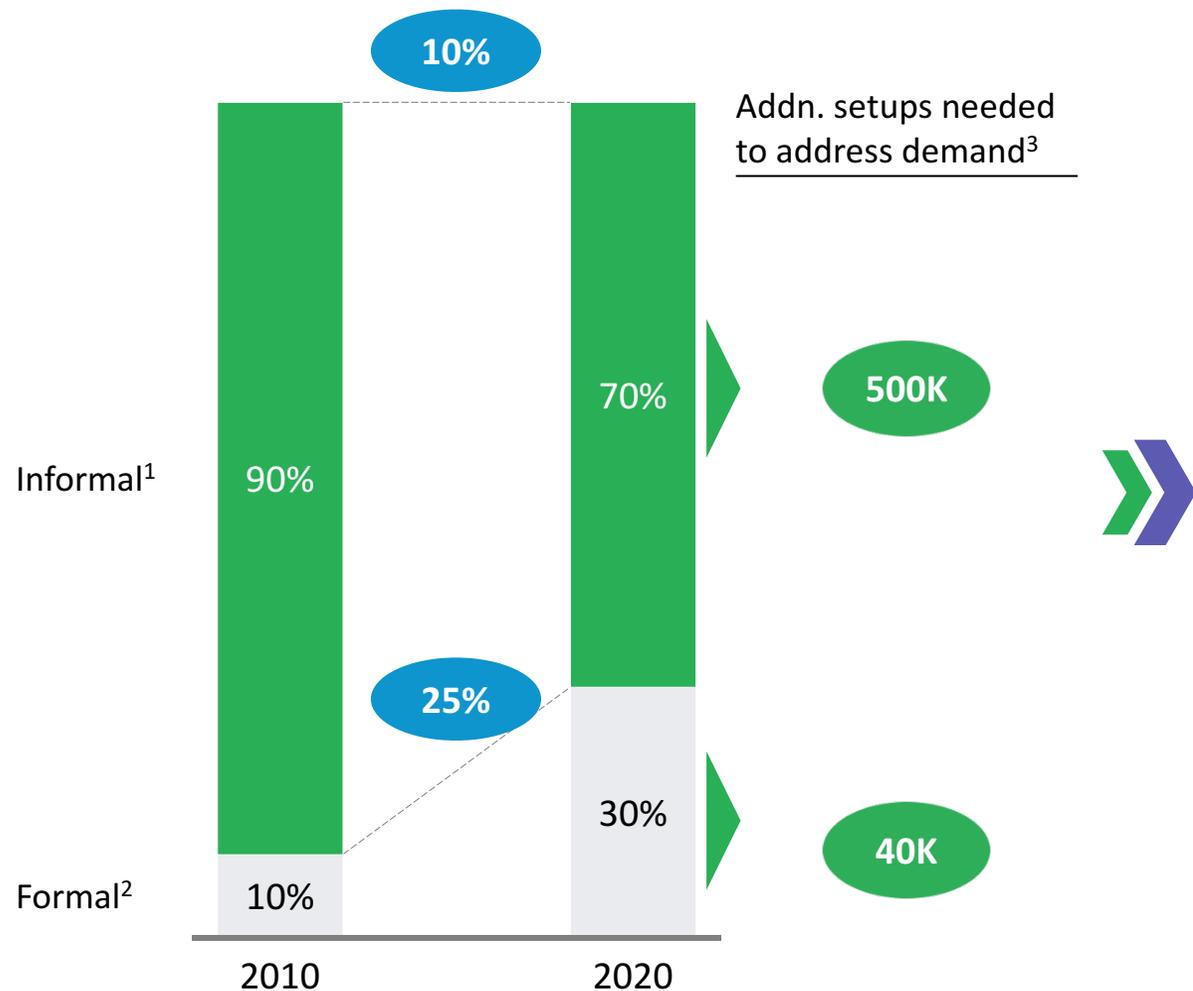
– Migrant Cook, West Bengal

"Parents prefer curriculum-based preschools for their kids as that will keep them prepared when they join K12 schools"

– Founder, Sandboxcare

Emerging lighthouse ideas in daycare/ preschool segment

Formal segment growing >2X of informal segment (in 10 years)



Lighthouse Ideas

- 1 Scale small, independent daycares to meet rising demand**
 - Opportunity to unlock barriers to scaling – e.g. support on initial CAPEX (10-15 lakhs for 15-child setup), how to handle quality at scale (esp. employment), pitching for & securing corporate business, competing / differentiating with home-based setups
- 2 Social enterprises to support kids from low income families**
 - Opportunity for social enterprises at scale to fix gaps in govt. system
 - Activate high-labor companies e.g. in construction to participate as part of CSR
- 3 Home-based hyperlocal care giving with small (<10 kids) setups**
 - For working mother segment that values vicinity heavily (e.g. home-based setups in same society)
 - Audit mechanism needed to ensure quality

¹ Small independent daycares/ preschools typically with 15 kids. 7.7 Mn Indian children in this system, roughly translating to >500k establishments; ² Large branded (company owned / franchisee) chains of daycare / preschools with 75 kids. 3.3 Mn Indian children in this system, roughly translating to 44k establishments; ³ Demand gap of 11mn children = (number of children requiring facility⁴ – number of children currently in preschool/daycare); demand gap split between formal & informal; ⁴. Number of children requiring facility = Number of children (0-4 yrs.) * % nuclear families * % women in labor participation

Vocational skilling – megatrends & gaps in the market

Mega trends

1 Large workforce additions expected in next few years in India however only ~5% goes through formal training

~100 Mn to be added to the workforce in next 3 years with sectors that demand skilling e.g. beauty, retail, healthcare driving growth

2 Limited emphasis on digital or entrepreneurial skills in formal curriculum

E.g. beautician of tomorrow (e.g. with UrbanClap) expected to independently build customer relationships, use app effectively, manage self-finances – not formally included in curriculum today

3 Informal / apprentice model is prevalent, however non-standardized & inefficient

Variability driven by teacher & 4-5x additional time taken to impart learning prove frustrating for learners

4 Affordable, hyper-local skilling models with good curriculum are effective

Chains with corporate partnerships for fees support / placement and founders with reputation in the space likely to deliver outcomes

5 Increased maturity & support from govt. interventions in the sector

NSDC and similar initiatives by state governments present in the space

Demand Insights

Attendance at training is quite low, could lead to partially trained associates

– Lead - Salon, UrbanClap

'We struggle to find skilled employees with an entrepreneurial mindset & hence spend a lot of time & effort on training. Finding quality franchisee partners is also a challenge'

– CEO, Lakme

"Change in TVET ecosystem can happen only with a mindset and cultural change - vocational training has a social stigma and that needs to change"

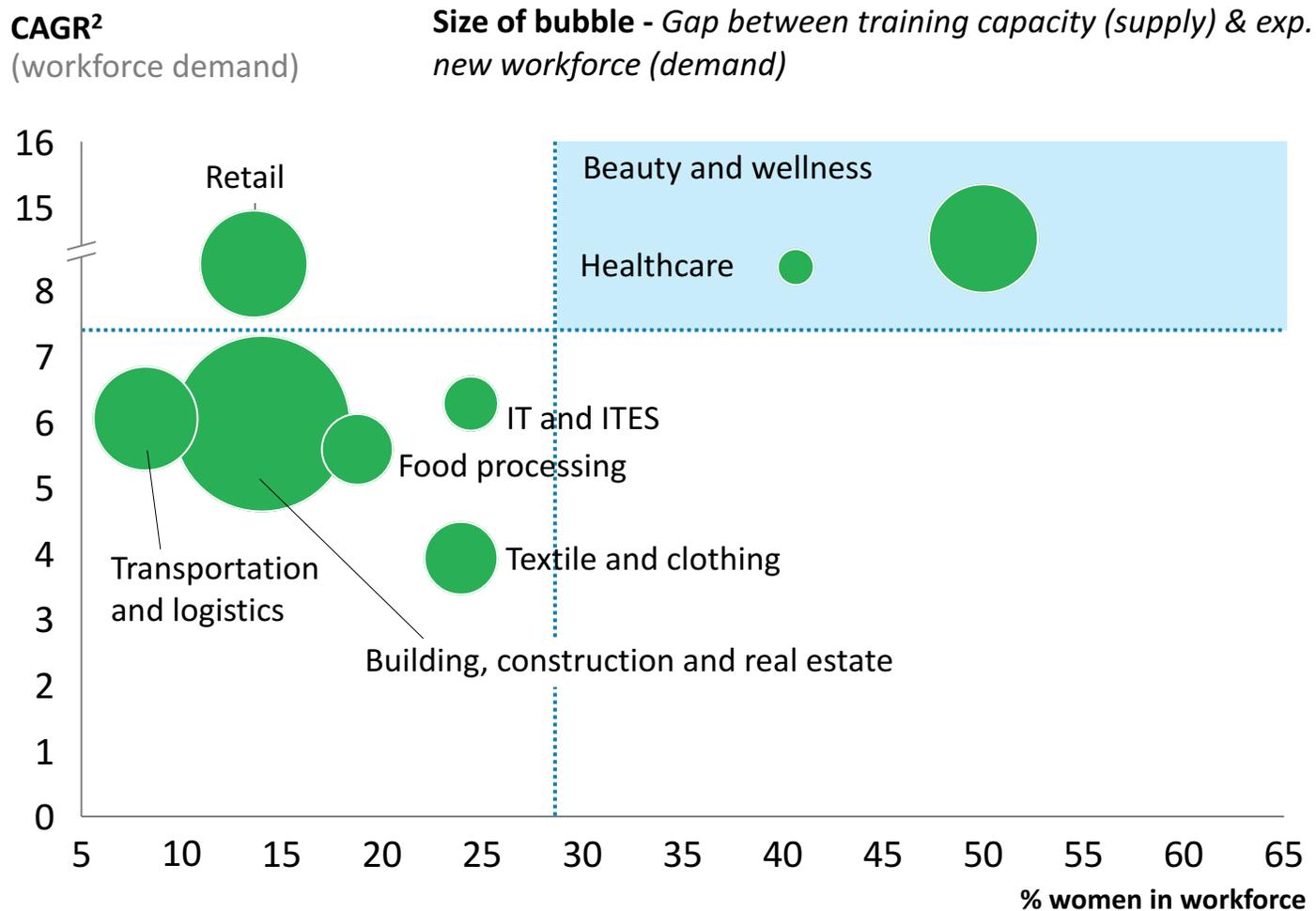
– Head skills, NIIT

'It took me 4-5 months at each level – first cleaner, then pedicure and slowly up the ladder. Was a very frustrating pace and I was getting paid quite less compared to experienced workers.'

– Beautician, Mumbai

Emerging lighthouse ideas in vocational skilling segment

Customer-facing sectors growing faster (~1.5X) than other sectors



Lighthouse Ideas

Localized skilling institutes in women-dominated sectors to create independent entrepreneurs (beauty and wellness as a template)

- Enable experienced beauticians to start & scale skilling establishments
- Curriculum partners crucial – e.g. sanitized modules from Lakme, UrbanClap who will also absorb large base of these students
- Similar model applies to several other roles e.g. grooming / basic IT skills for retail & hospitality space, home-based care & duty assistant role in healthcare, tailoring / textile design for apparel

Mega trends

1

Increase in enrolments from first-generation school goers (low-income segment) with need for after-school support

Schemes like Sarva Shiksha Abhiyan and Mid-Day Meal scheme etc.. have increased enrolment from lower-income segments, who are first time school-goers in the family (net primary enrolment to reach 70% by 2020), increasing the need for tutoring

2

Increasing awareness on perils of rote learning in our schools

- E.g. 60% of primary school children fail to achieve minimum proficiency in reading & arithmetic
- Rote learning is a major pain point between parents & schools – mushrooming of various alternative centers e.g. Kumon, CueMath with varying effectiveness to address this demand

3

Further widening of the demand-supply gap in teachers in public schools

In 2017, 18% positions of teachers in government-run primary schools and 15% in secondary schools were vacant; student enrolment rising faster than teacher addition

Demand Insights

“There is low skill requirement and high demand for teachers for private tuitions in Math and English in classes 4-8”

– Founder, CENTA

“My kids are not thinking independently because of having to learn by rote whatever is taught in school”

– Mother of 5 & 12 yr. kids

Mega trends

4

Ed-tech paired with live interactive model opening up new opportunities for home-based tutoring

- Ed-tech space broadly went through 3 transitions – video-based tutoring, app-based to white-board based interactive styles
- Parents looking for non-commuting home-based tutoring options for their children



5

Increase in inter-state migration for employment creating need for training in language

- In 2017, inter-state migration in India was 9mn – migrants moving majorly to Delhi, Maharashtra, Tamil Nadu, Andhra Pradesh and Kerala; need for migrant workers' children to learn vernacular (e.g. Bengali in Delhi)

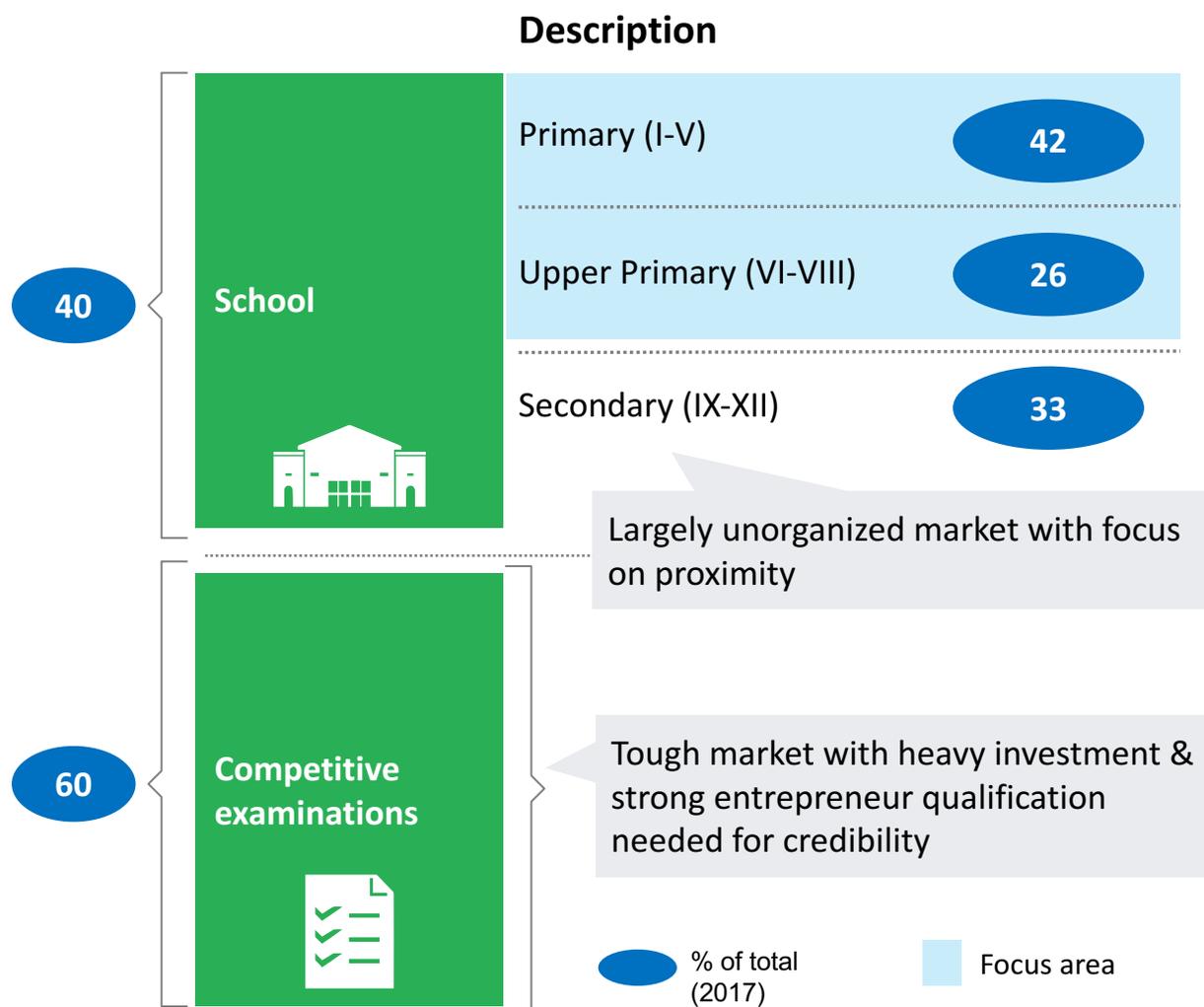
Demand Insights

“Students prefer interactive live-online tutoring in comparison to apps & simple online learning”
– Industry Expert

“Higher migration due to work opportunities of parents – hence kids require language training”
– Home tutor (Hindi)

Emerging lighthouse ideas in after-school segment

Overall coaching/private tuition industry: \$40bn



Lighthouse Ideas

- 1 Supplementary education establishments with emphasis on non-rote learning**
 - Inhouse non-rote learning curriculum training e.g. CueMath, WeMath
 - Independent supplementary (e.g. Kumon franchisee)
- 2 Independent home tutoring enabled by ed-tech - language & math to 1-8 grades**
 - Example: with ed-tech players like Vedantu
- 3 Career counselling setups**
 - Provide career counselling options to K8-12 or college students through blended model/pure offline play
- 4 Franchisee of big-ticket test-prep player**
 - Test-prep for competitive exams like CAT, CLAT/Law etc..
 - Familiarity of recent curriculum & exam methods

% of students availing tuition in XX grade as % of total students availing private tuitions = (number of XX grade students availing private tuition)/ (Total of primary, upper primary & secondary grade students availing private tuitions);
 Number of XX grade students availing private tuitions = number of students enrolled in XX grade * % of XX students availing private tuition belonging to grade XX

Map of lighthouse ideas in education sector

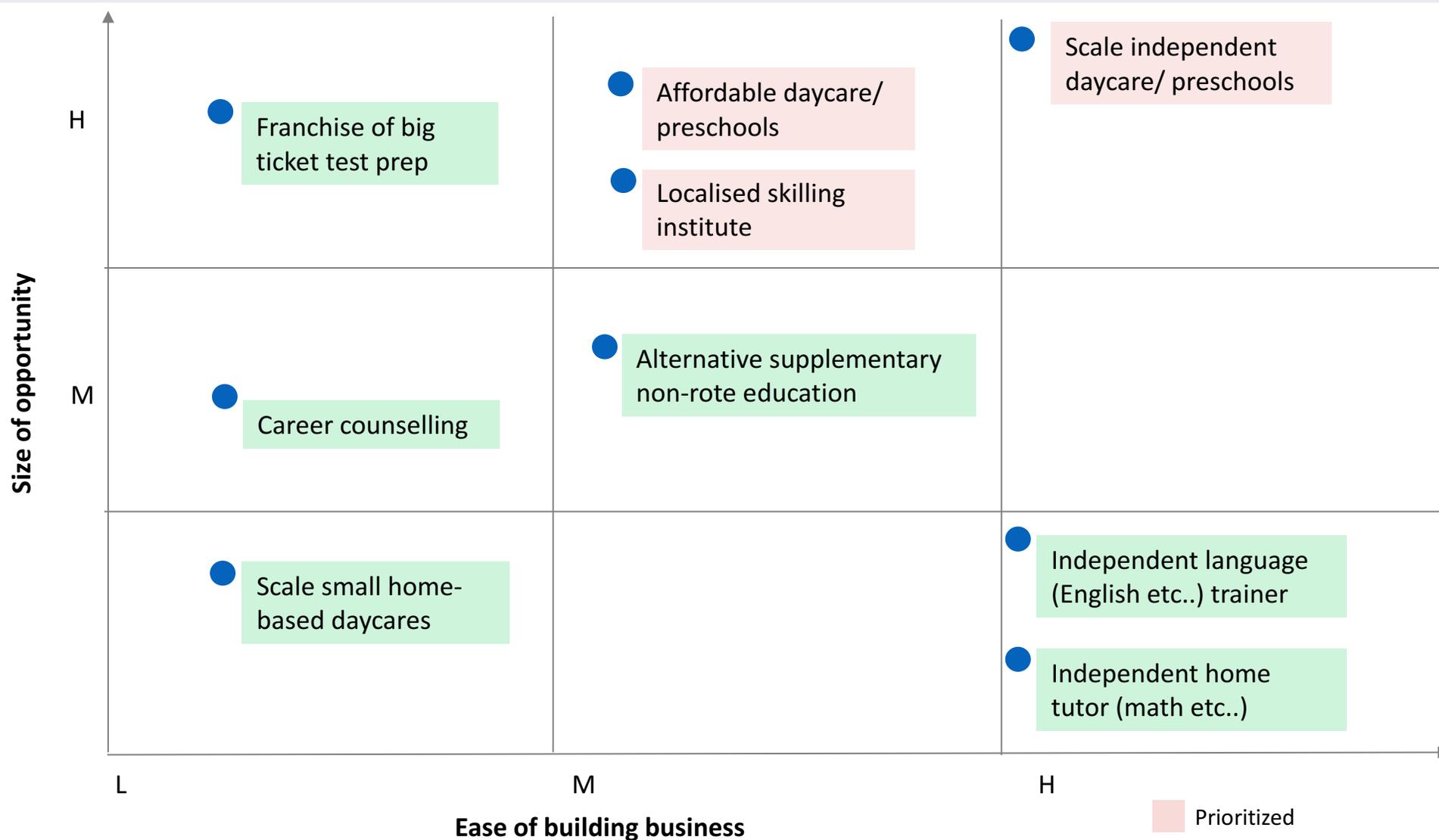
Prioritization criteria

Ease of scaling business:

- Requirement of skillset and domain expertise
- Capex requirement (low / medium)
- Delivery of quality of services
- Qualification of entrepreneur
- Ease of customer acquisition

Size of opportunity:

- Size of market
- Expected growth rate





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- Interventions



Early observation:

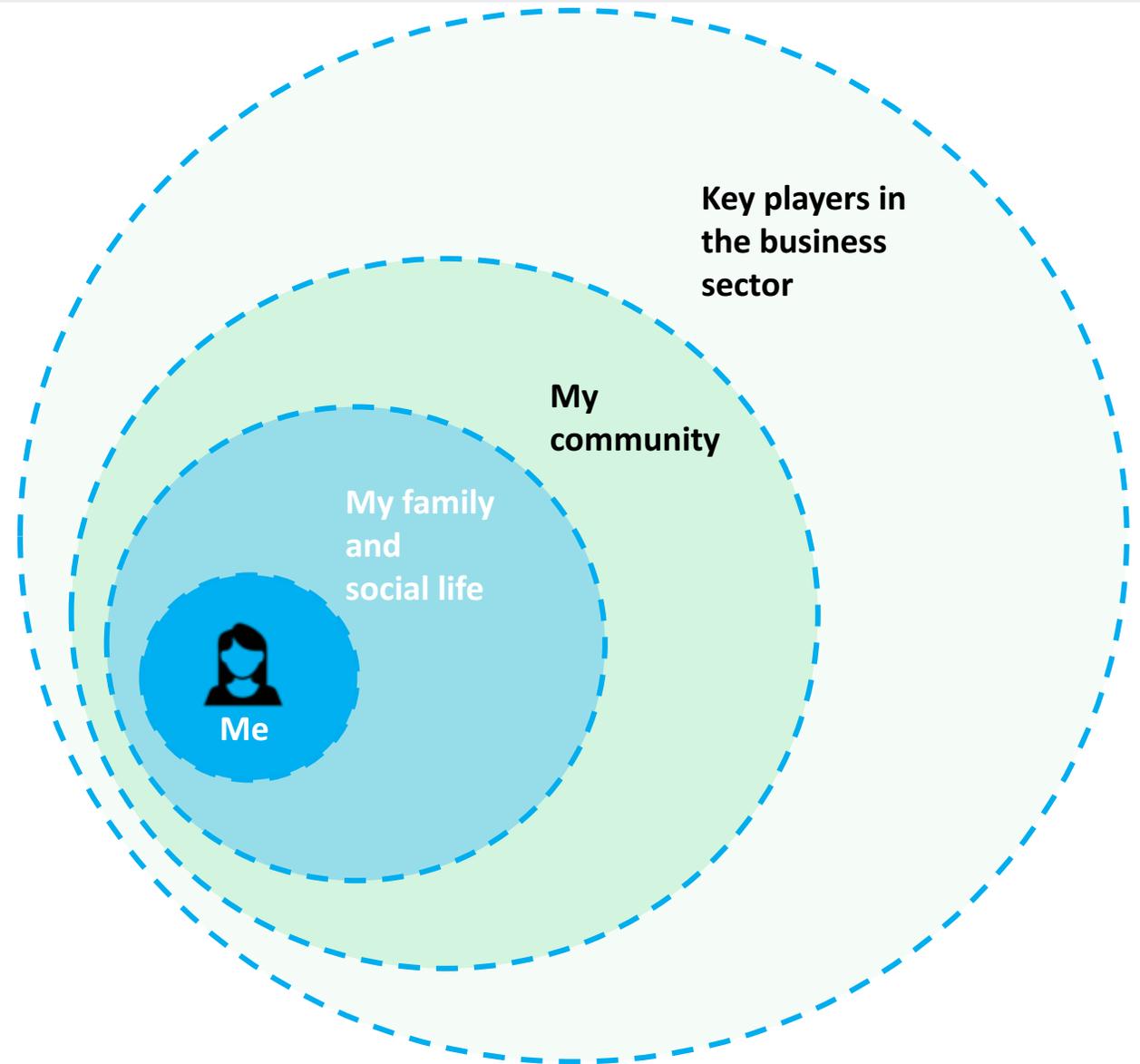
After sector prioritization, we spent 6 weeks talking to ~30 women in two cities (Bangalore and Mumbai) who are running businesses in food and education sectors. We formed a wide ranging view on challenges and boundaries that are more fundamental in nature.

We wanted to understand family and social circle support, how the environment reacts to a woman running a business, how male employees fit in and how the woman entrepreneurs finally embark on a scale up journey.

We wanted to deep dive, so we created the circles of influence to:

Check on patterns related to **entrepreneurial mindset of women**, what their worlds are like

- What **impacts do the family members and social circle** have
- **What role does the community play** for women who are setting up their business or trying to scale it up
- What impacts the journeys with respects to **key players in the eco-system; the govt. policies, the financiers and customers**



Entrepreneurship as an expression of passion

Two of the common themes that emerged were, leaving corporate life to start “something”, and home-makers wishing to occupy themselves by starting “something”. In spite of having all the skills required to be an entrepreneur, it is the lack of awareness of possibilities that emerges as the greatest barrier.

The pressure of the first step

When it comes to food as a venture, the pressure is less about funding or infrastructure, and more about psychological support from friends and family and having the courage to break societal norms and expectations.

The loan averse mindset

This mindset is driven by a perception of high interest rates, complex paperwork, the thought of long-term debt and fear of losing control.

The aspiration of a better work life balance

Working for self will probably always allow more freedom and life flexibility than working for someone else – this is an underlying belief in many urban women.



“If I had the right education, it would have taken just 5 years to reach here instead of 10 years”



“I never thought I will have my own business”

India is still largely a patriarchal society with an orthodox belief system

There is societal resistance to women creating independent identities based on a profession. Men are expected to succeed faster and higher than their women counterparts.

Currently available resources are under-utilized

Resource libraries like business entity registration, micro-financing, training & skilling are not effectively reaching relevant audiences, so have very low engagement.

Online sales channels offer the anonymity that some women look for

Due to social norms, introvert personality or other such reasons, some women thrive in formats that allow them the security & anonymity of in-house / limited exposure operations.



"It was not very easy to get students initially, being a woman people didn't trust my capabilities"



"I had the patience. People need immediate results and when they don't see it, they quit"



A mix of creativity and passion

Women that we spoke with took home-baking one step ahead and took it up as a business because they could mix their passion and creativity. Quite evidently, **they believed they are not selling cakes or cup-cakes, but are selling an experience.** These businesses are not created out of necessity, but out of a desire to do something different in life.

The quality sensitive customers

When it comes to food, customers look for quality. Be it home-baking or home-prepared meals, in today's urban digital India, **customers decide what is the USP of a brand.** The businesses thrive and grow based on customer feedback. Women we spoke with are **fearful of a scale-up diluting the crafted USP.**

Food safety, security and hygiene beyond taste

In our conversations with homepreneurs, the question of food safety and hygiene came out as a challenge. There are two aspects to it. A lot many foodpreneurs come from an **informal training background and do not pay enough attention to these aspects.** And also, they face challenge in conforming to the regulations due to **lack of information and clarity.**

Opening up the kitchen to the cloud

The online food ordering and delivery platforms and aggregators have opened up the kitchens of many women that we spoke with to a larger crowd. **It becomes important to keep track of the orders coming in from multiple online ordering platforms.** Tracking orders, reports and delivery helps optimize inventory. A customised POS system is an essential and not a widely available knowledge.

The issue of pricing

The volatility of prices of raw supply when it comes to food sector are dependent on multiple factors. **Starting from oil prices to seasonal impact of vegetable prices, there is volatility in the prices of raw material essential to food industry.** Maintaining a price point for the price sensitive Indian market requires a high amount of business acumen, and it came out in our conversations often.

The denial of a “hobby”

A lot many foodpreneurs in India still struggle to be taken seriously while balancing a family and a business. The concept of **opening up the kitchen to make a business out of it still is considered as a hobby** for many aspiring women entrepreneurs.



5 areas where barriers relating to starting and scaling up were evident

My Awareness

I am not aware of the possibilities of my passion



“I don’t know if there are people like me who are successful. I don’t have any role models”

Fragmented advisory (govt. & pvt.) & an inhibition to step out leads to poor recognition of business opportunities

My Skills

I don’t have all the skills or knowledge to be a successful entrepreneur



“I know cooking very well, but I don’t know how to store it for a longer time”

Less attention is paid to areas like **hygiene, preservation & at times even operational efficiency & unit cost optimisation**

My Mindset

I am sceptical about taking unconventional routes



“I won’t go for a partnership, I want to have full control of my business”

The lower you go in the socio-economic strata, the higher the **averseness to take debt & scepticism to start out** on their own

My Access

I don’t have access to all the resources available



“I know there are government schemes, but its very difficult to find those”

Often there is a **lack of coordination between government and social organizations, financiers** and the target women entrepreneurs

My Support

I don’t have an immediate support system



“I don’t have a mentor who can guide me”

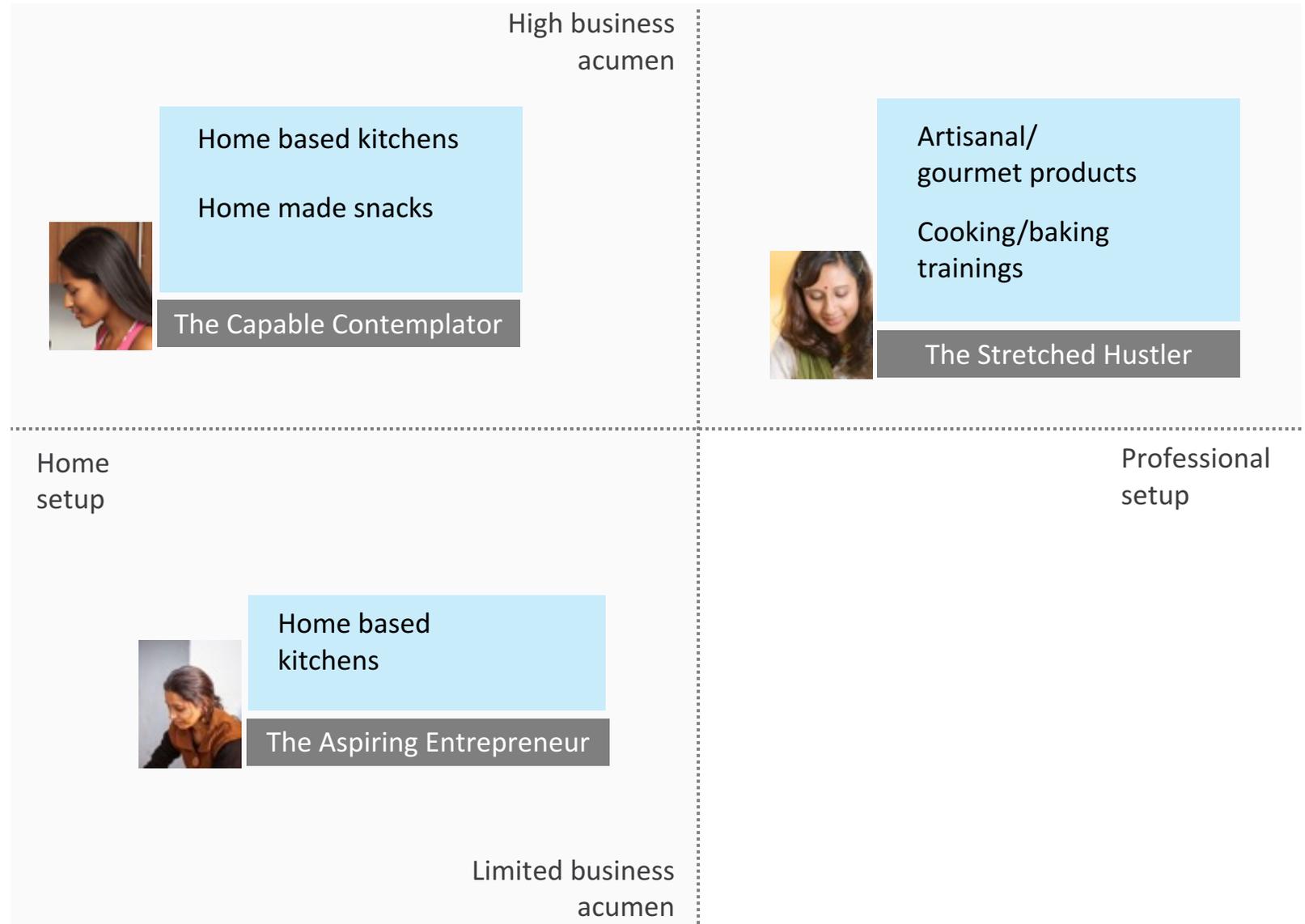
Weak support system of mentors and advisors that is imperative to growth

What is an “Archetype”

An archetype is depicted as a specific person but is not a real individual; it is synthesized from observations of many people.

It is a way to communicate and summarize research trends and patterns to others. This fundamental understanding of users is what’s important.

An archetype, is also known as “universal symbol’, a character, a theme. Archetypes have a common and recurring representation in a particular context.



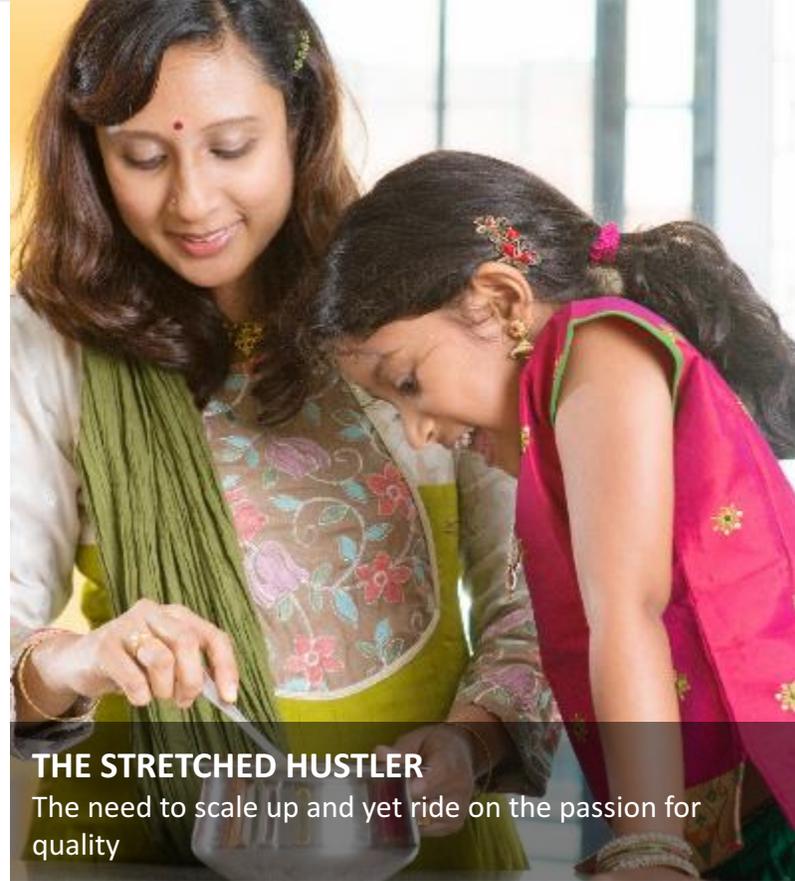
3 archetypes emerging in the foodpreneur space



THE CAPABLE CONTEMPLATOR

The need to get over apprehensions and walk the entrepreneurial path.

- Passionate about cooking and baking
- Takes it as an expression of creativity
- Apprehensive about taking chances and risks
- Wants to, yet scared of, leaving the current comfort zone



THE STRETCHED HUSTLER

The need to scale up and yet ride on the passion for quality

- Started out as a necessity. Started small and out of home
- Scaled up and explored multiple channels of selling food including digital platforms.
- Values quality over quantity
- Fearful of scaling up and is apprehensive about finding right set of people



THE ASPIRING ENTREPRENEUR

The need to get encouragement and the right resources to start her own business.

- Inspired by the success stories of others
- Finds it hard to believe that she can do it as well
- Isn't sure of how to get started and where to look for words of encouragement



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Entrepreneurship, employment & empowerment

Day care setups are playing an important role in supporting all three initiatives. In the Indian society, day care setups run by women are trusted more and almost all employees within these are women. These are also instrumental in helping women get more time to themselves and pursue careers, hobbies and me-time empowering them to be all they can be.

Primary formats: home-based, semi-professional, commercially driven

During research we noticed three scales of centres – a) less than 5 to 7 kids being run from the living room/additional room of a home-maker in a society b) up to ~30 kids format being run from a rented property (mostly an apartment complex) c) > 70/80 kids, being run from a commercially designed space specific to child care and development.

Motivations are largely driven by child care or commercials

During our conversations we noticed there are two types of motivations in this space: the first was, women who were motivated by changing the current day care industry through structured curriculums through tie-ups, franchises or affiliations. The other was just the need to monetise on space, time or the statistic. Also, there is a directive to corporates by Indian govt. to provide child care centres for their employees. Schools, corporates and even some real-estate players are getting into this space with varied focus on quality and holistic development.

Friction between the organised and unorganised players

There is a fundamental pattern in parents. One segment concentrates on the price of the care and services as long as they are safe and economical. The other segment looks for curriculum, brand & holistic development in the centre they will send their child to. These parents are willing to pay between 50k to 150k INR per year per child. The structured centres are encouraging government intervention to regulate the space and standardise services including those from informal, mom&pop day cares.





Operating models - for profit & not for profit

There are two clear focuses that were emerging in our conversations, one was the focus on SEC C, D (blue collar workforce) & underprivileged children and the other was on the children below 6 in the middle & upper-middle class. The former runs on donations, CSR funding & volunteers and the later on self-funding or formal financing through loans and investments.

Child care being high touch, need for quality is paramount

Entrepreneurs scale up slowly or do not scale up at all being fearful of not finding enough quality and trained professionals. They have challenges finding the right partners who would not dilute the quality standards of care and experience eventually hurting the brand reputation.

Services are rendered to and sold to different audiences

While entrepreneurs serve very young children, their paying customers are the parents. Their concern was that parental aspirations are often very different from the needs of their children. Parents tend to focus on the forward looking value of the services whereas the centres recommend that focussing on the child's current needs is paramount.

5 areas where barriers relating to starting and scaling up were evident

My Skills

I don't know how to get started. I am unsure about my business skills



"I didn't know if this would work, whether I would get couples to trust me with their children, whether I will be able to manage expenses – I had a lot of questions"

The tendency is to start with an 'how difficult can it be' approach and then navigating their way through the challenges as they go along.

My Finance

I need help with managing the expenses and planning scale



"I am apprehensive to take debt. What if I don't do well and firstly, who will give me this kind of money to set-up a professional place?"

There are a lot of inhibitions around terms of debt, the success of the efforts and the avenues that can be approached to raise finance.

My Value

I can't differentiate my value proposition w.r.t lower quality centres



"I am compared to centres based only on pricing. It is difficult to communicate value when price is the ultimate decisioning funnel. Quality teachers cost, quality curriculum is expensive to implement"

Cheaper alternatives that translate to lower quality, are commoditising the space and making it very difficult for the quality setups to communicate the price and value

My Employee

I don't know how to find quality employees who are equally motivated



"Not everyone in this field is trained. The available trainings are also fragmented. It is difficult to find experienced professionals so I train a lot of people myself!"

Weak regulations and poor trainings in the space, finding partners, employees, admin and help staff to run and scale operations, is a real challenge.

My Cause

How do I connect to like-minded people who are as passionate & willing about my cause



"Getting CSR budgets or crowd-sourcing funds to run an operation like mine is very tough. Raising finance is a job in itself and a tougher one when it is for social causes"

People in the social sector are not as well connected. A network is needed that can collectively work to support children from low-income families

Bollywood, content penetrating deeper into the rural areas has increased spends on styling & trends

With Bollywood & media (news, films, entertainment) reaching larger audiences in the rural markets by the day, there is an increasing trend of spending on beauty, styling & glamour. This is opening up careers in beauty even in rural/tier3 areas. Now women can train and serve their own locality, district or city. The increase in spends is largely by women customers.

No education or finance barrier to enter

Due to the huge gap in demand and supply - there is a lack of talent in this industry. The salons and training institutes welcome people of all backgrounds into this industry. The men entering this industry tend to gravitate towards hair-styling and massage therapy, while women have more options such as facial therapy, manicure-pedicure, skin treatments and so on.

No centrally governed certification/accreditation or skilling & training

The standards of beauty & wellness training and experience vary as you move across the country. The larger salons and services like L'Oréal, Enrich, Urban Clap are filling this gap with their own courses and certifications. This is also acting as a great source of talent for them.





Key career options: Independent stylist (event/market based), salon, salon+trainer

There are few options in this field - women who are single, have lighter family dependencies or have support systems at home, tend to grow as celebrity/event specialist stylists (weddings, parties, etc) because of the mobility involved; whereas women who want/are tied to a location tend to cater to a locality independently or by starting a salon with the support of capital from friends and family.

Key reasons to get into skilling: brand building & recruitment

Most tenured/experienced stylists and beauticians get into training and skilling for 2 key reasons - to find talent that they can hire, and to supplement their individual/salon's brand. The entrants have the option of paying the fees or working it off over a period of time ranging from 3 months to a year. This "guaranteed placement" also attracts a more dedicated crop of professionals.

Skilled beauticians also act as a customer acquisition channel

Every salon uses their front line beauticians as a customer acquisition channel by giving them substantial incentives on repeat customers, cross-selling of products and related services and referrals. This is where the beauticians first recognise the entrepreneur in them and desire to pursue the “why not do it on my own?” dream.

Faster financial growth as compared to other vocation based careers

In the metros (SEC A&B audiences) - professionals with no formal education can start earning upwards of INR 30K+ monthly within a few years of being in the beauty industry. With their fixed income being lower than the 20k INR mark, their incentives can be almost as much or more.



5 areas where barriers relating to starting and scaling up were evident

My Start

I don't know the best place and terms to raise finance



"I knew starting out would require a lot of money. This wasn't going to be easy. I had supporters but to put everything together was a near impossible task"

Experienced stylists start a business with support from friends, family and regular customers. They take on considerable debt and are then under great stress to deliver

My Employees

I can't find quality professionals even though there are so many training institutes



"Even with so many places to train, the quality of professionals coming out is very questionable. Keeping people beyond the 12 month mark is really tough"

Poorly trained entrants make it difficult for new salons to deliver quality. Established salons won't hire newcomers due to their poor training

My Market

I am finding it difficult to compete with technology-driven marketplace at-home services



"With all my challenges, the market is only getting more competitive. At-home services are so affordable and becoming more popular everywhere"

While the spends on beauty and wellness services are increasing, it is mainly in the at-home services category. Walk-ins are reducing, price wars increasing

My Skills

I want to share my experience and skills. Newcomers can benefit from my guidance



"Training is so important in this high-touch service. I ensure that all my stylists are very good. I also want to use training to recruit talent"

Professionals are finding it difficult to find time to train and run their operation. They want to be part of skilling to raise industry standards and also recruit young talent

My Brand

I want to build a brand, if I stay as a small setup, I won't survive beyond a point



"I cannot afford to fail, there is a lot at stake and to survive I need to make my brand known for the quality that my salon can provide"

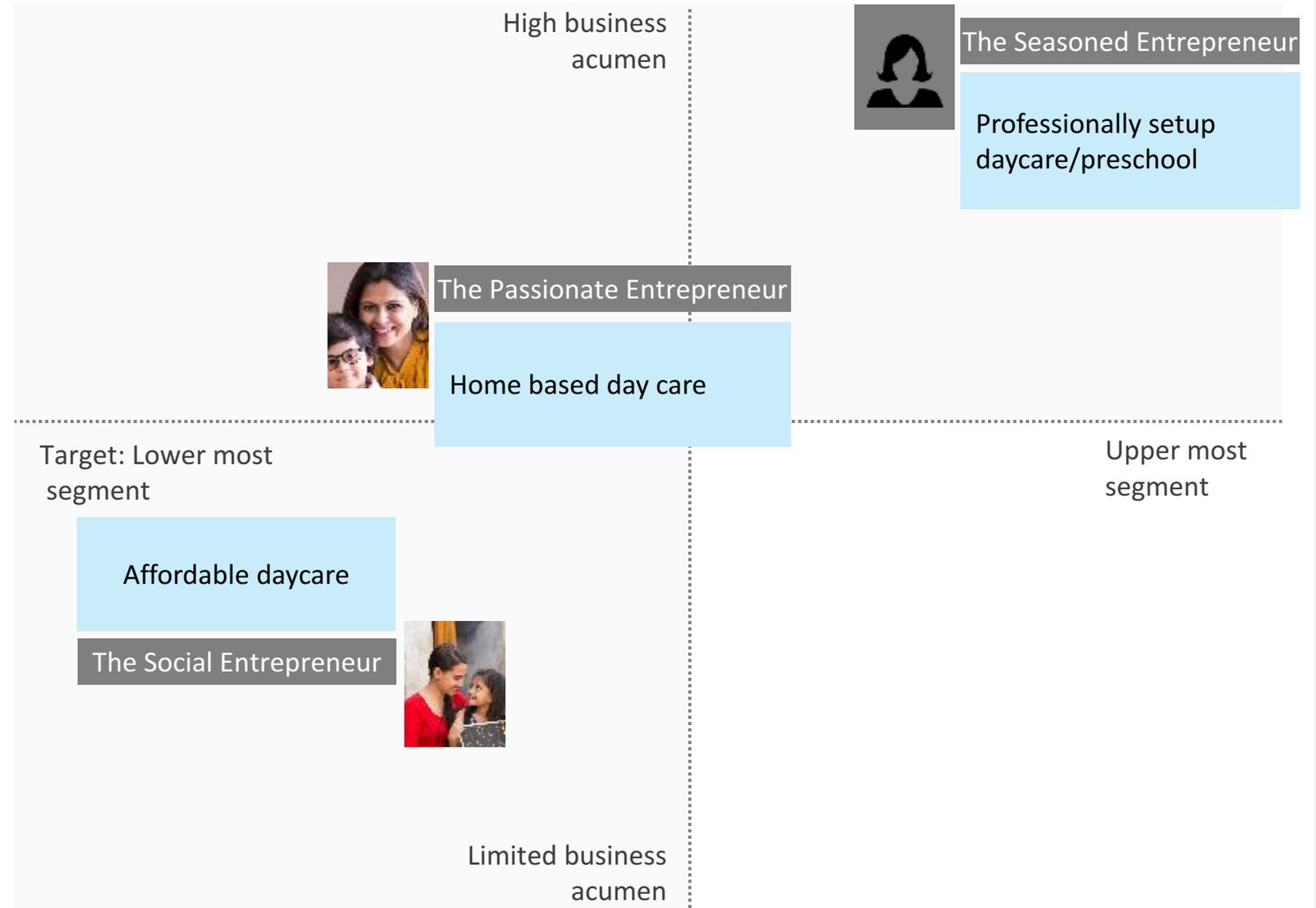
Reputation is everything in this business, building a brand is imperative and there are many complexities like competition, unskilled employees & more

What is an “Archetype”

An archetype is depicted as a specific person but is not a real individual; it is synthesized from observations of many people.

It is a way to communicate and summarize research trends and patterns to others. This fundamental understanding of users is what’s important.

An archetype, also known as “universal symbol”, a character, a theme. Archetypes have a common and recurring representation in a particular context.

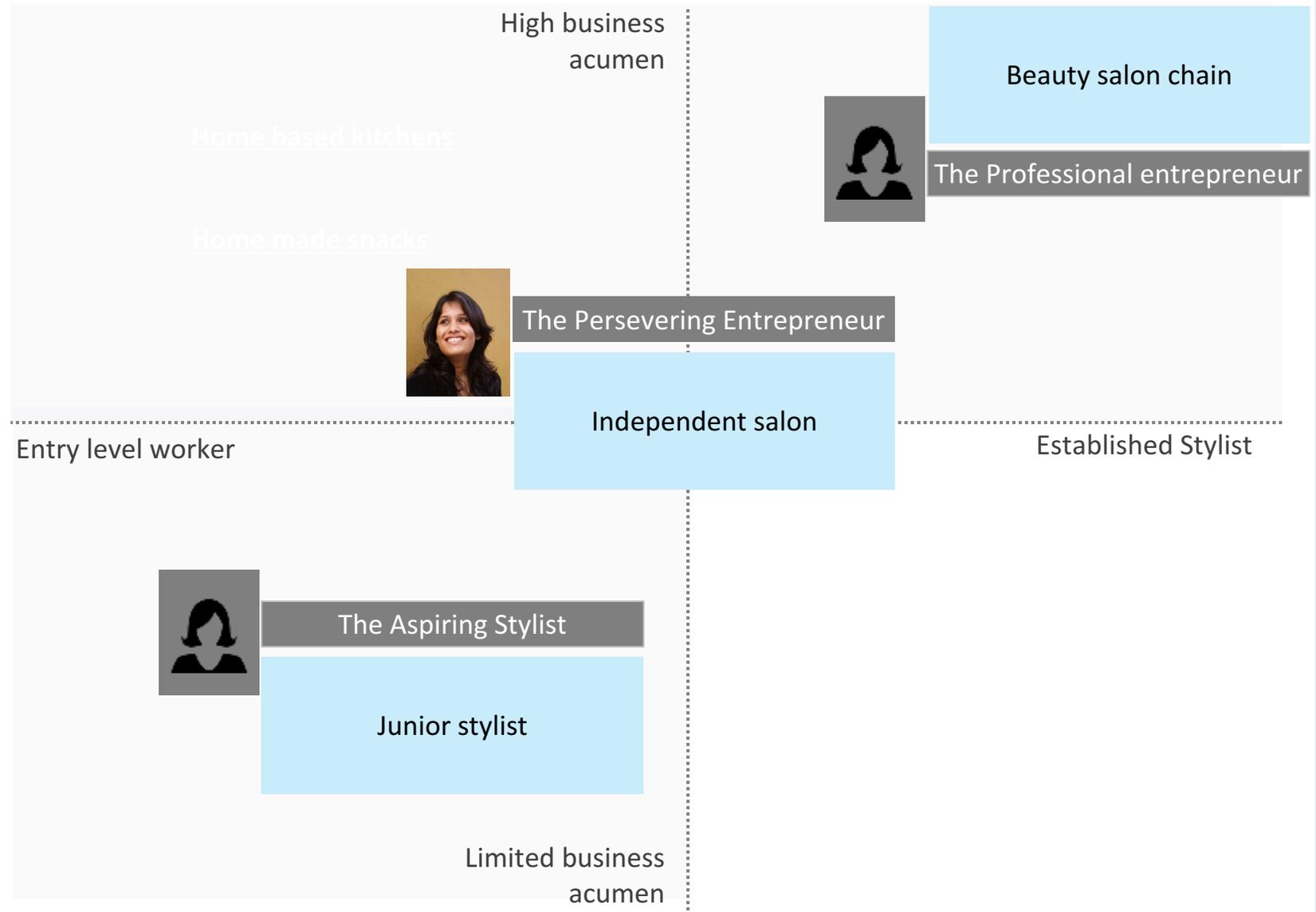


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3 archetypes emerging in the education space



THE PASSIONATE ENTREPRENEUR

The need to grow and get to the next level in child education space

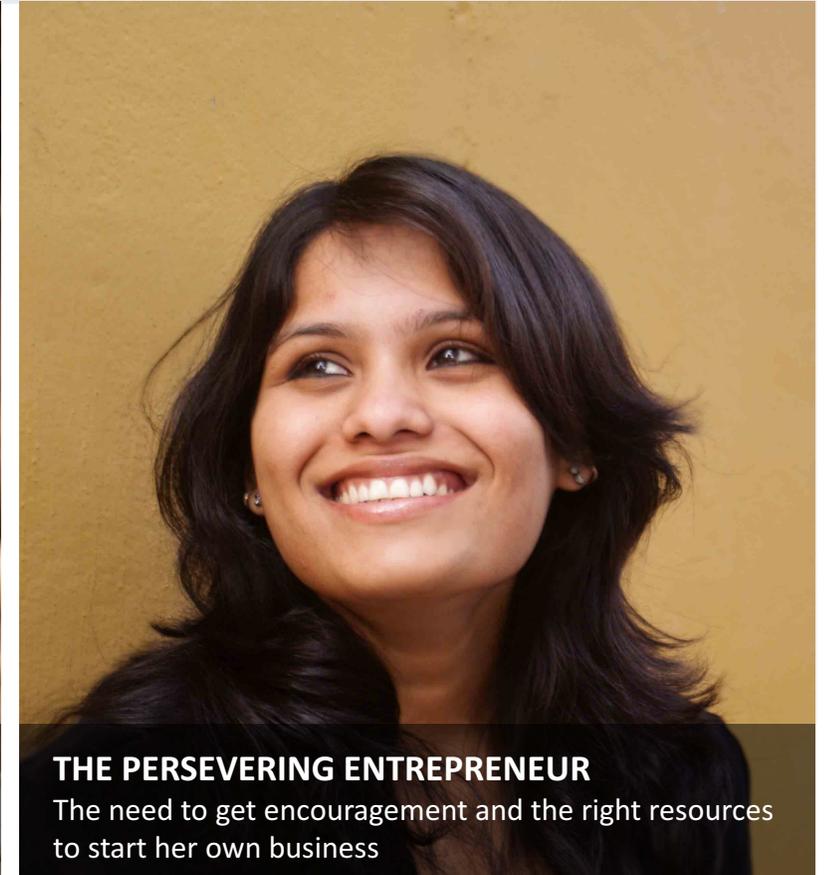
- Passionate about education
- Natural flair for childcare
- Educated, been a professional and eventually followed her passion for child care and created her own business
- Determined to take the next steps



THE SOCIAL ENTREPRENEUR

The need to scale up and have larger impact on society with her work

- Enthusiastic about social impact work
- Formally trained, educated and also experienced
- Values and ethics driven
- Isn't sure how to get over financial troubles and stay afloat



THE PERSEVERING ENTREPRENEUR

The need to get encouragement and the right resources to start her own business

- A middle class background with aspirations to be a change-maker
- Chanced upon finding her own passion
- Took all the opportunities to convert her passion into a business
- Of the mindset that finding the right talent is a challenge



Contents

- Introduction & Summary
- Sector prioritization
- Voice of Market
 - Food sector
 - Education sector
- Voice of Entrepreneur
 - Food sector
 - Education sector
- **Workshops**
- Interventions needed & role of GAME
- Backup



Separate workshops were conducted for prioritized sectors using a fresh out-of-the-box problem solving technique (**design thinking**) on

- How to look into the **end-to-end journey of an entrepreneur** with respect to starting and scaling up a business
- Demand aggregators, entrepreneurs and end consumers together approached and defined problem statements in a time-boxed schedule to draft a starting point for solutioning

Why design thinking workshops?

The workshops were conducted after the voice of market and ethnography research to validate the findings, get additional inputs from experts and to **ideate on possible solutions**

Workshop objectives

- Understand motivations, challenges and emotions of different personas identified through ethnographic research and empathize with them
- Identify the pain points of each of these personas in their entrepreneurial journey
- Find different ideas to solve those painpoints
- Role of the ecosystem to make those solutions a reality

Workshop modus-operandi

- Invite leaders, demand generators covering the industry landscape
- Co-create user personas, user journeys
- Co-create solutions and identify role of stakeholders

The Hackathon process



Personas: Identify Current challenges

Define a key persona and brainstorm current pain points they experience



Journey mapping: Current Entrepreneur Journey

Identify the persona's current experience in concrete steps to walk in their shoes



Ideation: Solutions for the pain points

Use top prioritized pain points to conduct lightning ideation.



Present Hacks

Teams will present their solutions to get quick feedback and build upon one another's ideas





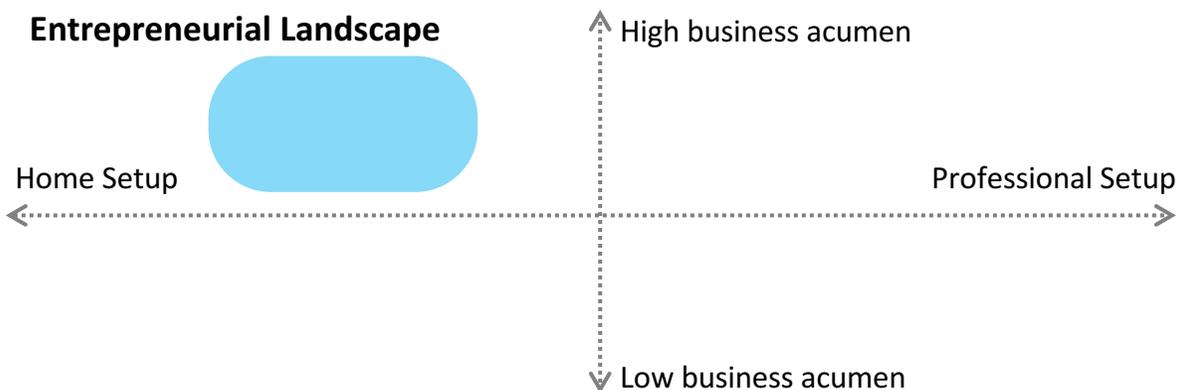
Gloria

The Capable Contemplator

27 years old, recently married, currently employed

Gloria has always been passionate about cooking. She has done a few short courses in baking and western cuisine cooking to further her interest. She always hears encouraging words about starting out on her own but also has heard about failed attempts in the food business and has apprehensions. She wants to quit her job but wants to be sure before she does. She is looking for support to get her going - business advise, pricing advise and the like. She spends time in looking at multiple cooking blogs dreaming of her own business.

Entrepreneurial Landscape



Digital Savviness



Business Savviness



Skills



Motivations

- Wants to do something independent in food space. She wants to further her talent into a successful business
- Wants to stay close to her family & aspires to earn for a good lifestyle for them
- She wants to create an identity of her own and inspired by someone already in the field

Challenges

- Worries about failure stories of others and apprehensive to start her own
- She has done preliminary research but hasn't been able to connect with experts who can help
- Feels guilty about the starting costs
- Worries she won't be able to balance time between family and business
- Unsure of the decision to "quit the job"

"... I am not sure if it is worth the effort trying to scale up my training classes, I have more time for family now"

The Capable Contemplator



Scenario

Realising the business possibilities of her skills

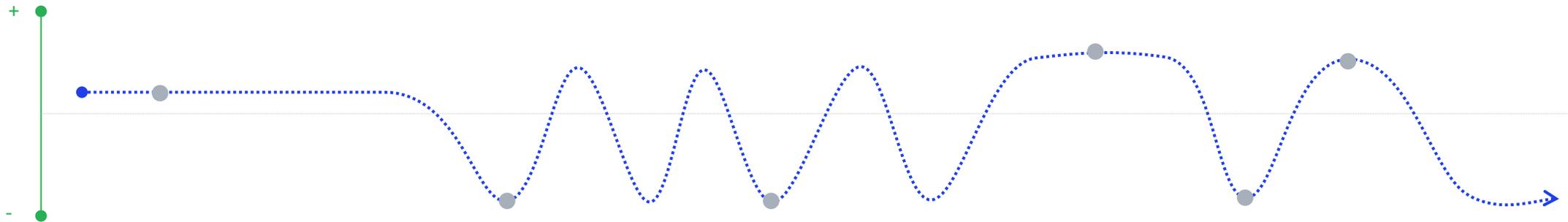
Initial conversations, Googling courses, reading business blogs and inspiration stories

Finding the perfect product offering within the food space

Testing her skills and products on a smaller forgivable scale with friends, family & colleagues

Finding the first set of customers and secure repeat orders

Emotional Curve



Needs / Pain Points

- I didn't know what possibilities are there for me to start a business
- I am not sure what it takes to sell my food online
- Can I start with what I am good at?

- Not sure if I can package baked food, cookies, chocolates
- How to optimize quantity to prepare for orders
- How to package food for delivery

- Where can I learn about food safety and hygiene
- How can I learn to optimize the shelf life of my packed food
- Can I attend a workshop that builds my confidence

- Can I start by selling to my friends and neighbors
- How can I give out samples to people or look for exhibitions
- Join and secure orders through WhatsApp/Facebook/Instagram

- Join and secure orders through WhatsApp/Facebook/Instagram
- Where else can I sell my products
- How do I list on existing platforms

Resources

FACEBOOK ▪ Friends



- Friends and family
- Society/corporate events



Solution Opportunity Space

- Disseminate success stories of entrepreneurs
- Access to **best-of-breed 'curriculum'** for knowledge dissemination
- Interventions to boost self-confidence

- Boost Peer-to-peer connections & learning amongst entrepreneurs

- Curate resource library for self-help & learning
- Masterclass by experts

- Small-scale demand for learning & experimentation

- Interactive marketplace to discover corporate demand
- Supply to local mom-and-pop bakeries



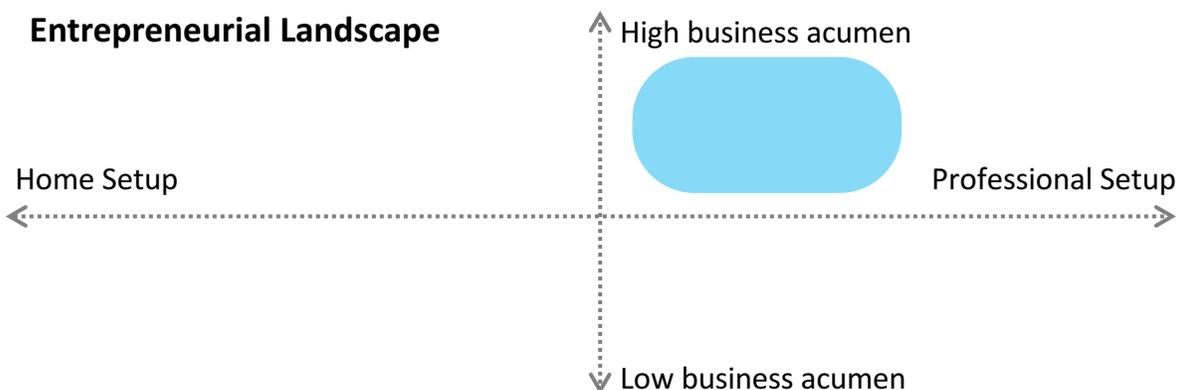
Anuja

The Stretched Hustler

37 years old, she lived with her brother and son, currently runs a catering service

Post her husband's demise, she moved to Bengaluru from Orissa with her brother. To keep herself occupied, she started a small out-of-home catering service. Her food was very well received and with the help of her brother, she took it online. She now worries about handling the scale while retaining quality. She is averse to the idea of partnership since she doesn't want to dilute the decision-making power she has now as she feels that nobody will value her company as she does. Currently her brother helps in her business.

Entrepreneurial Landscape



Digital Savviness



Business Savviness



Skills



Motivations

- Loves the independence that her earnings give her and wants to support her son and help him realise his dreams
- She wants to scale her business without compromising on her operating principles and control
- She wants to acquire new skills

Challenges

- She expects more societal encouragement and does not trust corporates and organizations
- Finding employees who care about quality as much as she does
- Wants to have more time at hand for her son
- She isn't very digitally literate and is financially conservative

"... I am doing well and I really want that push to get to the next level, I know I'm ready!"

The Stretched Hustler



Scenario

Realising the business possibilities of her skills

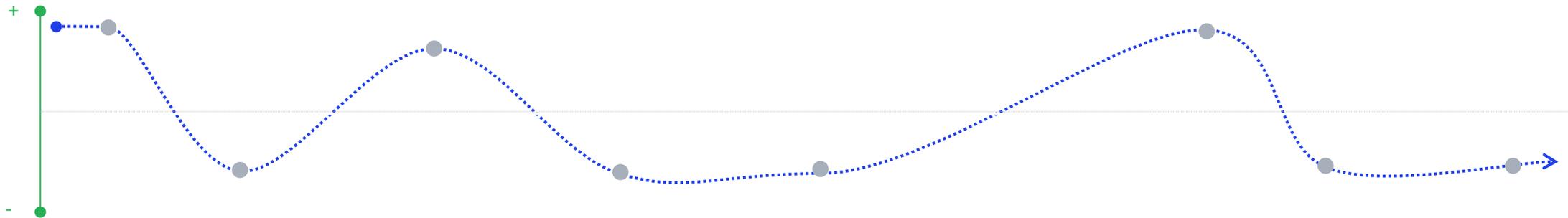
Initial set up, promotions, first customers

Product, pricing, market fit

Improving the value proposition

Promotions, optimizing operations, inspiration from competition

Emotional Curve



Needs / Pain Points

- Its going well but she doesn't know if its possible to take it to next level
- She doesn't know what it will take to scale up
- Packaged food is a good idea but she has never done it before
- She doesn't know how to promote her offerings
- She is unsure of how to find a new set of customers for packaged food
- She doesn't know if people will like her new recipes. How does she collect feedback ?
- There is a lot of food being wasted
- She doesn't know what should be in her menu and how much should she sell it for
- She doesn't have adequate space or equipment

Resources

- TV/Radio
- Newspaper stories

- Friends and family

- Existing customer base
- Society/corporate events



Solution Opportunity Space

- Success stories of entrepreneurs through offline/online channels
- Scale up ideas for inspiration
- Simple business plan checklist

- Online demand generators to provide special promotions on their platform.
- Tie up with corporate office complexes especially for packaged food
- Micro finance to get started

- Society events, market place in corporates to test the recipes
- Meetups to discuss the challenges and learnings
- Trainings on peripheral skills

- Demand generators supporting with menu and pricing

- Rented equipment/space to reduce cost.
- Continuous supply of raw material without price fluctuations



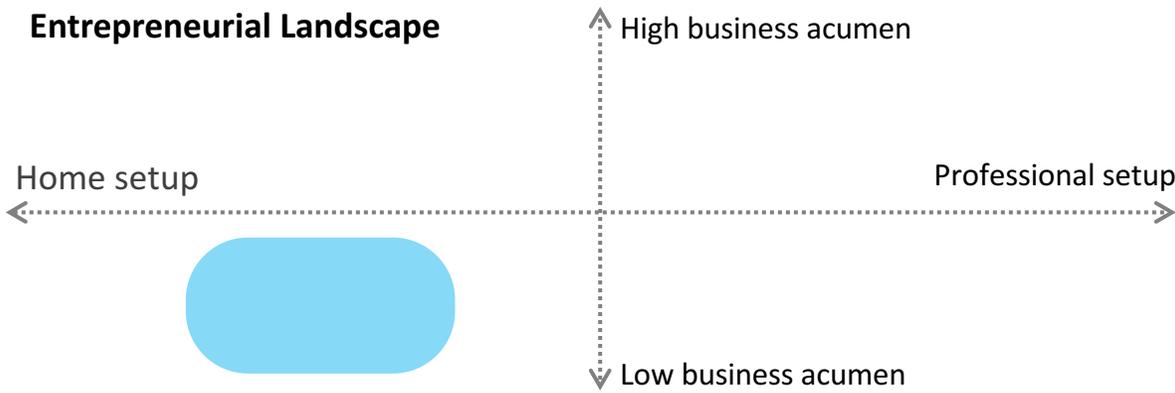
Pushpa

The Aspiring Entrepreneur

36 years, Married
with 2 Young Kids

Pushpa lives in Indore. She hails from a very modest financial background. She currently works as an office cleaning staff and hears about success stories of women entering into the food catering business. She aspires to start a tiffin service for the people in her office but doesn't know how to get started. She feels that this is a distant dream meant for the fortunate. She has spoken to people in her circles but hasn't received any encouragement to venture out.

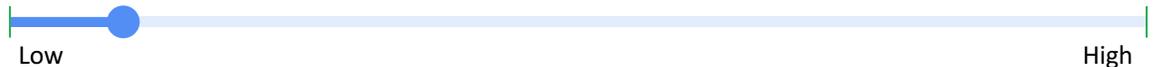
Entrepreneurial Landscape



Digital Savviness



Business Savviness



Skills



Motivations

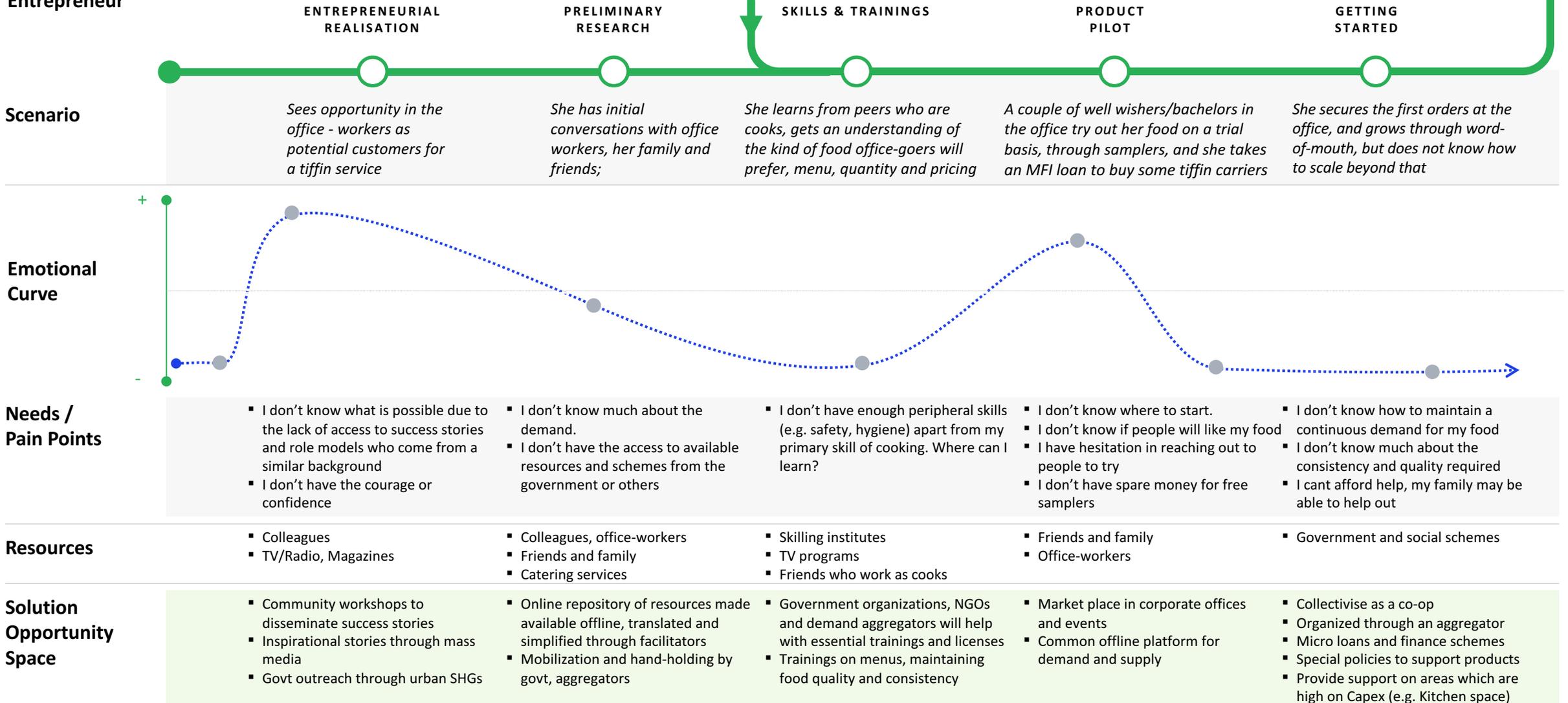
- Pushpa wants to break out of the financial strata that she belongs to. She has the confidence and is willing to commit to delivering quality food
- She expects her husband and eco-system to be more encouraging & supportive of her aspirations
- She has received positive feedback about her skills and is constantly trying to figure out how to further her passions into a venture

Challenges

- She feels it unfair that there aren't avenues for her to get structured guidance
- There is an impression that anything she starts will be capital intensive and hence out of her reach
- She doesn't know how to convince people close to her that she can rise as well as an entrepreneur
- She doubts if she will be able to have the right infrastructure to get started

“ The system is not made for people like me... I also have dreams.. how do I get started?”

The Aspiring Entrepreneur





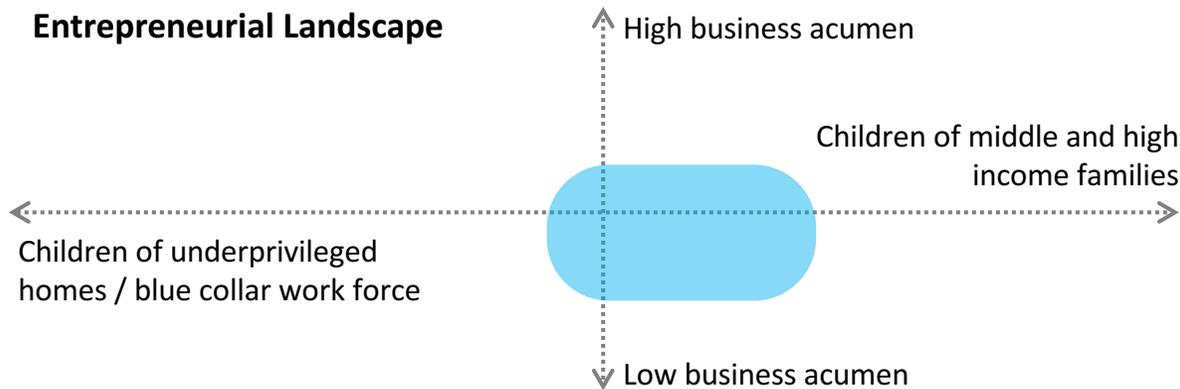
Neha

The Passionate Entrepreneur

31 years old, married with 2 children, supplementing her household income

Neha comes from a middle-class family that values education. Always fond of children, she started baby-sitting cousins and neighborhood kids as a teenager. Post graduation, she worked in the corporate sector for a few years but quit to pursue her calling in the childcare space. After her wedding she started a small day-care out of her living room. Currently, she has 9 kids at her day-care. She feels, unless she takes the next steps and starts a pre-school she won't be able to grow, and is unsure of how she should do it.

Entrepreneurial Landscape



Digital Savviness



Business Savviness



Skills



Motivations

- Providing high quality child care to the working mother
- Ensuring holistic development for children between 6 months to 6 yrs.
- Building a brand & identity for her business
- Wants to scale beyond her living room to a more professionally run center

Challenges

- Fighting mom-n-pop day cares that are lower priced and offer poor quality service
- Convincing parents to pay a premium for her high quality services
- Managing her finances to finance the next one, finding the ideal place for the next outlet
- Screening candidates to run the next

“ How do I fight off low quality centers mushrooming everywhere while creating a brand for myself that can be more than just a day-care? I think I will have to become a pre-school...”

The Passionate Entrepreneur



Scenario

Neha was always driven by her passion for children. Her entrepreneurial drive kicked in when she had her first child

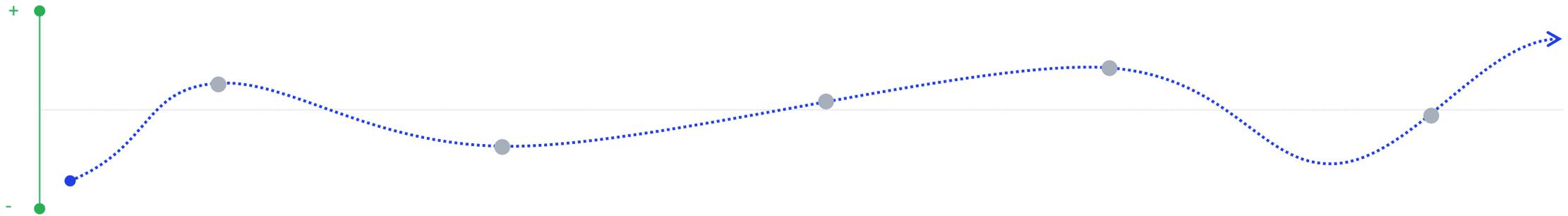
She doesn't find the answers that will help her get started, she has support but no guidance

She connected with courses online and did a short 6 month course to get started

As she ran her center, she picked up a lot of skills like selling her proposition, basic accounting amongst others

She raises capital from friends & family to get started from her living room. She hires a few maids to assist

Emotional Curve



Needs / Pain Points

- After her baby, she finds it difficult to go back to work since there aren't any good day-cares around. She finds a lot of women like her looking for quality centers
- She decides to start one herself & now wants to know what will it take?
- She has no one to learn from - she starts checking online for the types of day cares that exist, reading on best-in-class, dos and don'ts
- She needs to understand price, first customers, baby proofing, maids to help
- It's difficult to find courses that will help her do a great job,
- How will she put together the curriculum & services that her center will offer
- How will she train her maids & help to ensure quality service
- From the feedback & encouragement from her customers she realizes that this business has potential and so does she
- She now starts penning down a larger & long term plan
- The new plan needs finance and that is hard to come by for her profile, she is hesitant to take debt
- There is a need for more teachers & help who aren't easy to find & quality ones don't fit into her estimations

Resources

- Inner drive to improve society



FACEBOOK

YouTube



ASSOCIATION MONTESSORI INTERNATIONALE

- On job training
- External courses

- Friends & family
- Short term loan

Solution Opportunity Space

- Community Centers that empower women for entrepreneurship
- Networking opportunities with other successful women in this space
- Clear communication of certifications that will help her create the brand and service promise
- Templates for business that can help her get started
- Accredited Training and skilling programs that help her upskill and make her relevant to the industry
- Training designed around her life, schedule and finances
- Regulations that provide guidelines, to address low quality mom & pop centers
- Connecting her to experts like curriculum, marketing & sales that help build her brand
- Micro-financing products designed for her
- Dos & Don'ts of the franchise model
- Business skill programs that demystify entrepreneurship



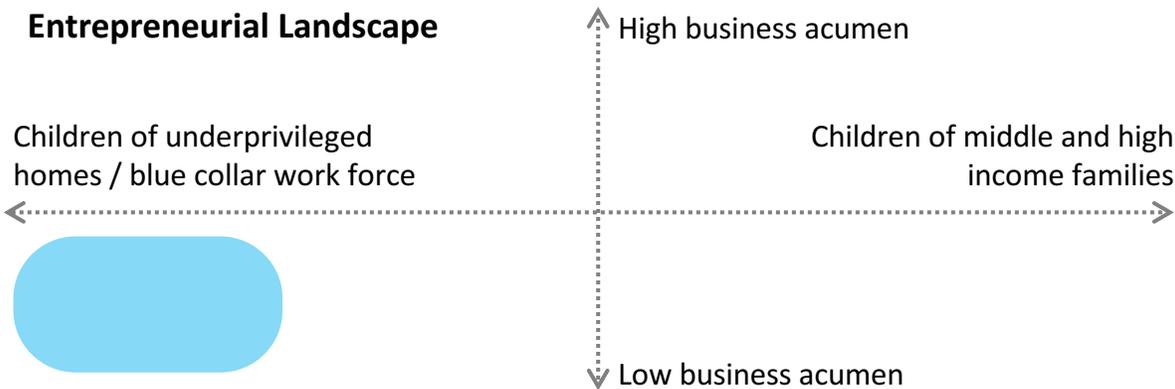
Geeta

The Social Entrepreneur

32 years old, married with 2 children, supplementing her household income

Geeta comes from a middle-class family in Mumbai. Graduated from TISS with a focus to work for underprivileged children. She volunteered with the Govt. ICDS program in Pune. She has taken the ICDS charter and is implementing it the way it ideally should be. She now has over 50 children that she is taking care of. These are children of day-wage and other blue-collar parents. Most pay a nominal fee between 100 to 500 rupees per month and some are not charged. She wants to scale but is finding it difficult to stay afloat.

Entrepreneurial Landscape



Digital Savviness



Business Savviness



Skills



Motivations

- Ensuring holistic development for underprivileged children: nutrition, education, health & wellness
- Campaigning for improving the condition of children in our country by touching & improving as many children's lives
- Empowering & encouraging women to work in this space

Challenges

- Finding a usable place that is free/cheap
- Finding women (sevikas) motivated enough to do this at nominal pay
- Raising finance on a continuous basis to meet running costs
- Convincing day-wage labors to continue care at home – and send the children regularly
- Ensuring a nutritious daily diet for the children

“ I hate the stress of how am I going to pull through the next few months. It's so difficult to find people & organizations motivated to help this cause... they exist but are far and few”

The Social Entrepreneur



Scenario

Geeta has always been socially motivated, wanting to work for the underprivileged since she was in college

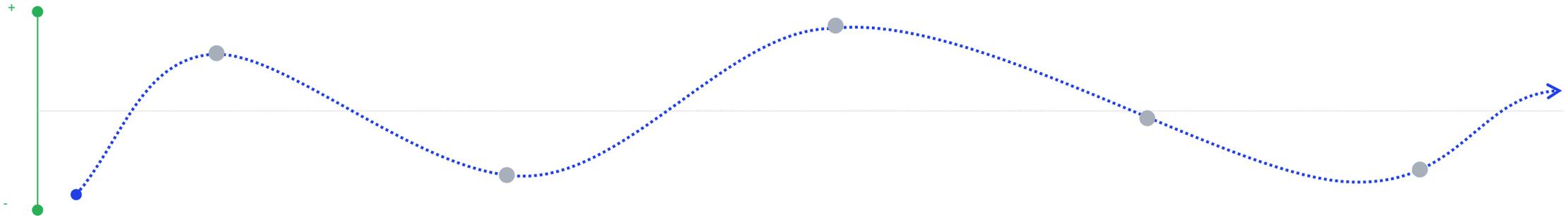
She has been volunteering at every chance she gets – at her college, in her society, at home with various agencies

She has picked up most of her information, skills, inspirations volunteering with ICDS & others. She's ECC certified professional

Opening her first center and working with the first 20 children is what cemented her passion and made her understand her value & skills

She raises capital from friends, family & CSR budgets of corporates. She gets started in a garage close by

Emotional Curve



Needs / Pain Points

- Geeta is very moved by the care, health & nutrition needs of underprivileged children
- She was very motivated after her degree at TISS and has a lot of ideas about how to meet those needs
- Her network at TISS has helped her identify the way forward, but it is very broken & fragmented in many ways
- There aren't enough people in the system to execute plans the way they should be
- Geeta tries to equip herself with all the knowledge and approaches many corporates for things like space, activities, donations for diet programs and is confident of delivering quality service
- Everyday operations demotivate her as it is tough to make ends meet financially
- Finding committed helpers is tough, she has high churn
- She is torn between raising finances & running her center
- There are moments of delight when funding comes through, when new volunteers join
- Meeting other entrepreneurs in this space is encouraging, but challenges still remain
- There are several unique challenges in engaging with children and families in this background

Resources

- Inner drive to make an impact



- Volunteering
- External courses



- Friends & family
- Short term loan



Solution Opportunity Space

- Social impact related courses could teach entrepreneurship, to encourage people in this space
- Platforms to showcase great work will attract talent to work for the underprivileged
- Community platform that connects entrepreneurs from various social initiatives so that they can leverage services – like catering for *aaganwadis* or volunteer-teaching by college seniors
- Govt. skilling programs that help execute the objectives accurately
- Trainings could be made free/subsidized
- The govt. could help social entrepreneurs by providing subsidies for real estate, procurement and other operational needs
- Platform to synchronize CSR budgets that can help Geeta sustain & scale
- A credit system that encourages people to work in the social sector



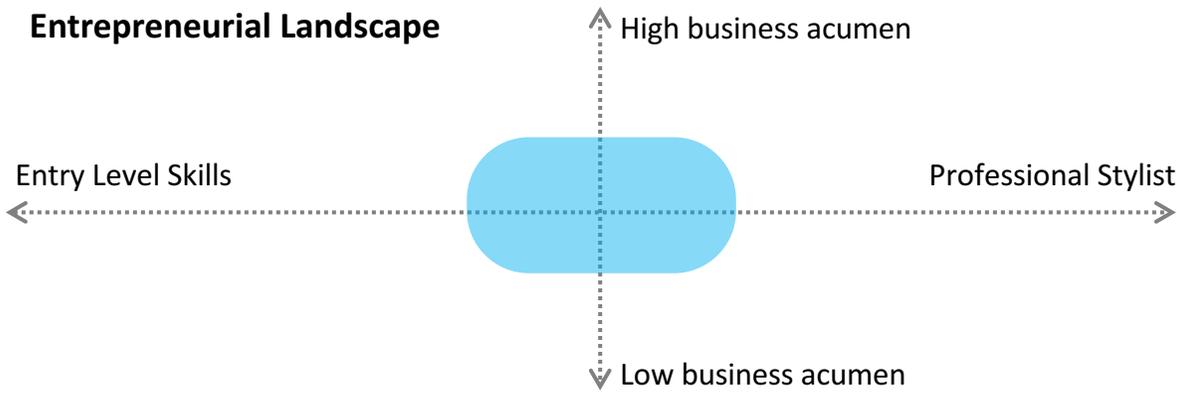
Payal

The Persevering Entrepreneur

30 years old, married with a child,
primary bread-winner of the family

Payal hails from a middle class family from a small town in Assam. She didn't complete her education after the 12th grade and ran away from home to find her own identity. She found her passion in beauty, glamour and wellness. Recognizing the easiest point of entry, she joined a local beauty parlour as a cleaner. She got married early and had a child at 22. She stopped working to do a 6 month beauty course to become a stylist, eventually becoming a lead stylist at a national salon brand. She's been an entrepreneur for 10 years.

Entrepreneurial Landscape



Digital Savviness



Business Savviness



Skills



Motivations

- Self worth & standing out in society
- Aspiring lifestyle for self and family by supplementing the household income
- Freedom from economic dependency on her husband
- Good education for her children
- Become a recognizable brand in the beauty space

Challenges

- Upskilling herself amidst poor-quality training institutes
- Finding dependable employees & retaining them beyond 12 months
- Finding new customers
- Managing her expenses & creditors
- Cross-selling beauty products that she stocks on her shelves

“ Everywhere I went, the first question was – how educated are you? Can you speak in English? The only question the lady at the beauty parlour asked me was – when can I start?”

The Persevering Entrepreneur



Scenario

Payal picked up her skills on the job and has seen stylists earn a lot of money in tips & commissions

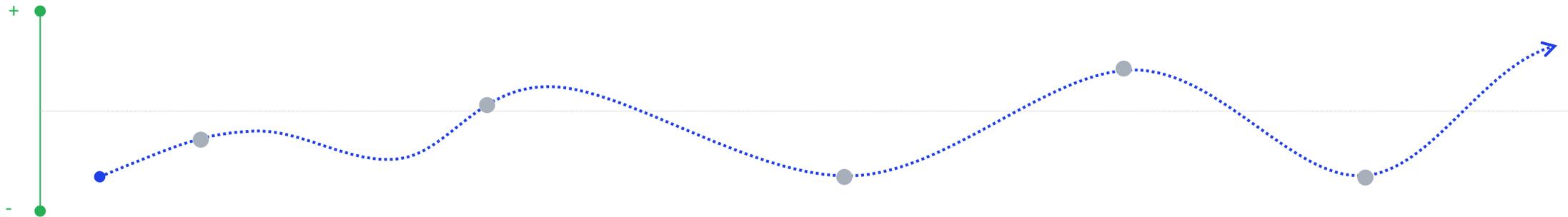
Talking to her colleagues she learns that she can make a lot of money by upskilling herself

She sees courses online, she asks her seniors for recommendations, also approaches salon chains

She learns on the floor, shadowing seniors and practicing every opportunity she gets to showcase value

She raises capital from friends, family & customers to get started on her dream of owning a parlour

Emotional Curve



Needs / Pain Points

- She finds her passion in beauty, an industry that welcomed her without judgement of education or socio-economic background
- She hears success stories of women from similar backgrounds making it big in beauty & wellness
- She speaks to seniors and peers who encourage her to chase her passions
- She approaches other experts & professionals in the industry to learn more about the trade & trends
- She struggles to work and learn together, she would have to stop working to pick up or sharpen her skills
- She is worried about the money she will need to do a formal training
- She realizes that she has skills because of the peer & client feedback
- She starts to make a lot more money now that she is a stylist
- She looks forward to growing
- It was difficult to raise funds since this is a capital intensive venture
- Managing creditor expectations are tough
- Payal doubts her business skills and fears failure

Resources

- Colleagues & Seniors
- On the job observations



- On job training
- External courses

- Friends & family
- Regular customers

Solution Opportunity Space

- Community Centers that empower women to take up entrepreneurship
- Like-minded peer group meet-ups
- Success story meet-ups
- Easily understood policies and programs that help her plan and structure her future
- A supportive immediate network groomed through social messaging
- Accredited Training and skilling programs that help her upskill and make herself relevant to the industry
- Training designed around her life, schedule and finances
- Experience based trainings that help her showcase her skills and command a commensurate value
- Connecting her to experts and job opportunities
- Micro-financing products designed for her
- Business skill programs that demystify entrepreneurship



Contents

- Introduction & Summary
- Sector prioritization
- Voice of Market
 - Food sector
 - Education sector
- Voice of Entrepreneur
 - Food sector
 - Education sector
- Workshops
- **Interventions**



In summary, 11 interventions emerge for women ME (1/2)

Top interventions

Entrepreneurial skills & mindsets

- 1 Boost **Peer-to peer connections & learning** amongst entrepreneurs (most were brought in through friends & family) through channelized group discussions. Crucial for imparting sensitive / trust-led learnings e.g. high-earning potential in beauty space
- 2 Disseminate **success stories** of entrepreneurs with relatable personas (overall perception that failure stories spread faster) e.g. networking sessions with successful home chefs from FoodyBuddy, local inspirational stories on mass media. Cultivate into a **mentorship channel** for individual support
- 3 Access to **best-of-breed 'curriculum'** for knowledge dissemination e.g. Swiggy on how to cook consistently at scale, Klay on best practices for child-care, Akshaya Patra on nutrition for day cares, online course by Udemy on **self-confidence**. Leverage partners / ecosystem to keep this knowledge current and well-curated
 - Curate **resource library** for self-help & learning e.g. bullet check-list on how to get day-care accredited, list of licensing requirements for making packaged foods etc..
 - **Hand-holding** and high touch model through facilitation by government or non-profits

Financial and business model support

- 4 Enable entrepreneurs build **clear business plans** basis needs & aspirations e.g. deAsra encouraging beauty entrepreneurs to do a local market survey to assess pricing
 - Increase **awareness** on **business model options** & pros and cons e.g. beauty expert has choice of beauty salon vs. skilling vs. Urbanclap
- 5 **Unbundle** components (esp. areas of **high CAPEX**) for **better unit economics** of entrepreneur e.g. 'WeCook' for chefs to access better equipment, 'WeSpace' for govt. school space for low-cost day-cares

In summary, 11 interventions emerge for women ME (2/2)

Top interventions

Financial and business model support

- 6 **Unlock and demystify govt. support** for entrepreneurship e.g. navigating the Mudra loans process which is perceived complex, securing NSDC support for beauty skilling institutes
 - Drive group discussions on **policy changes** e.g. govt. support for affordable day-care (similar to affordable private schools), emphasizing entrepreneurship content in the **NSDC curriculum, certifications and regulations** for day-care, **customized financial products, marketplaces** (offline, online) and unifying **brand, demand aggregation** for group-led micro-enterprises
- 7 **Co-operative models** for entrepreneurs who gain from working as a group eg: homepreneurs who need flexi-time can band together to ensure production/service consistency, SHG members who are mobilized and supported by the government and can avail of group loans

Demand & market linkages

- 8 Connect with and champion for **value-chain stakeholders** needed for successful business e.g. demand aggregators to sign up entrepreneurs, packaging consultants for home-based snacks, networking sessions with employees from nearby institutes, workshops with representatives from food circle, marketing and sales experts
- 9 Facilitate access to **small-scale demand** for learning & experimentation e.g. pop-up kitchens in housing societies for home chefs, home-based skilling for beauty
- 10 Establish interactive **marketplace to discover corporate demand** and to augment interactions with demand generators for common understanding of needs e.g. Swiggy on what cuisine they need prepared in the micro-market
- 11 Build an efficient '**registry**' of **entrepreneurs** & subsequent **clearinghouse** of **local supply and demand** e.g. mom-and-pop bakeries needing local home-based chefs, local corporate demand in cafeterias

How 11 interventions play out in food sector (1/3)

Interventions

What can be done

Entrepreneurial skills & mindsets

- | Interventions | What can be done |
|--|--|
| <p>1 Boost peer-to-peer connections & learning amongst entrepreneurs</p> | <ul style="list-style-type: none"> ▪ Offline Community centers will provide a platform for entrepreneurs to meetup and discuss. ▪ Online platforms like Facebook, Microsoft Kaizala, Whatsapp, will be leveraged to create online support groups to connect and discuss challenges and interventions
e.g. WhatsApp groups to connect entrepreneurs hyper-locally, Facebook communities like #Shemeansbusiness to start a chapter in Bangalore |
| <p>2 Disseminate success stories</p> | <ul style="list-style-type: none"> ▪ Successful entrepreneurs thriving in different operational formats will be identified and invited to share their stories, best practices and tips to encourage exploring entrepreneurs ▪ e.g. TEDx platform to conduct talks & events to share success stories |
| <p>3 Provide access to best-of-breed 'curriculum' for knowledge dissemination</p> | <ul style="list-style-type: none"> ▪ Emphasis will be placed on pedagogy and content that builds self-confidence amongst women to think big and increase their risk appetite ▪ Marketplaces like Swiggy & Zomato will conduct programs such as - how to cook consistently at scale, how to optimize production costs. ▪ Other expert-led local institutes will also undertake sessions on primary and periphery skills
e.g. Experts to conduct "Cook & Bake with ..." to skill entrepreneurs in food hygiene, food quality, preservation techniques and packaging ▪ Not-for-profits and Government can provide hand-holding and facilitation of curriculum, integration into skilling centers and SHG interactions |

How 11 interventions play out in food sector (2/3)

Financial and business model support

Interventions

- 4 Enable entrepreneurs build clear business plans
- 5 Unbundle components for better unit economics for entrepreneur
- 6 Unlock and demystify govt. support for entrepreneurship & drive policy changes
- 7 Co-operative/group models for entrepreneurs who gain from working as a group

What can be done

- **Business plan templates** will be made available to the entrepreneurs via DeAsra.
- Community centers will host sessions by experts on **pricing, operation optimization, branding and business development**

Leveraging the expertise from partners like Swiggy, Zomato & Big Basket, **unit economics for different formats will be templated** for entrepreneurs to leverage e.g. help women create business accounts across the value chain to use **standard, subsidized rates**. Standardized raw material costs for home cooked meals or packaged snacks from Big Basket

- A collective of experts from big box players, marketplaces, successful entrepreneurs will **simplify the communication** around govt. finance, infrastructure, skilling policies that support women entrepreneurship. Where required, this **collective will work closely with govt. bodies** to influence, **guide & evolve these policies**
- Support for **Food sector (processing, snacks, meals)** can be advocated and initiated by relevant departments, in partnership with Alliance members for value-chain representation – processing parks, **marketplace** (offline, online) under an umbrella **brand, demand aggregation** and development of **group-led micro-enterprises (eg Kudumbashree Kitchen in Kerela)**, etc

- Demand aggregators eg Swiggy can assist with the setup of **co-operatives of home-based chefs** in a locality, ensuring regular supply
- Non-profits eg Aga Khan Development Network set up Zaika-e-Nizamuddin - a **self help group** comprising of the mothers of Hazrat Nizamuddin Basti who offer catering, home-delivery etc.
- Avail other benefits eg access to **group loans**

How 11 interventions play out in food sector (3/3)

Demand & market linkages

Interventions

What can be done

- | | |
|--|---|
| <p>8 Connect with and champion for value-chain stakeholders</p> | <ul style="list-style-type: none"> ▪ Aggregators can be championed for/formed to bridge smaller entrepreneurs to larger players like Swiggy, etc; Connections made with entrepreneurs offering packaging, marketing, access to distribution networks, logistics; Retailers, corporates can be roped in to promote niche Indian flavours |
| <p>9 Facilitate access to small-scale demand (or corporate demand) for learning & experimentation & help entrepreneurs find their value proposition</p> | <ul style="list-style-type: none"> ▪ Partner with top 100 brands for fairs and small-scale events that will help identify trends, opportunity areas – customer needs & possible clients. ▪ Small scale events in residential complexes, corporate office complexes, large institutions or manufacturing units will be approached to pilot product offerings (flavors, quantity) price points & other aspects of the food business. ▪ Successful pilots can then be scaled to SLAs that would be served by a collective or individual entrepreneurs. This will help new entrepreneurs find their ground faster and exploring entrepreneurs stabilize and growing entrepreneurs scale
e.g. A place where Swiggy can meet potential home chefs, local bakeries can connect with Home bakers, event managers and corporates can connect with caterers |
| <p>10 Establish interactive marketplace to discover corporate demand</p> | <ul style="list-style-type: none"> ▪ A tech platform by government or for-profit startups/tech giants, to facilitate B2B interactions for the food industry, between small-scale suppliers and demand generators, showcasing a common understanding of needs e.g. Swiggy on what cuisine they need prepared in the micro-market |
| <p>11 Build an efficient ‘registry’ of entrepreneurs & subsequent clearinghouse of local supply and demand</p> | <ul style="list-style-type: none"> ▪ Along with being a networking place, community centers will also track the progress of the associated entrepreneurs. ▪ Through ‘local champions’, the centers will maintain the most recent & validated directory of suppliers & vendors to help entrepreneurs get all solutions under one roof |

Case Study: Kudumbashree Kitchen

Kudumbashree Kitchen

- An online competitive aggregator platform to harness market potential, by Kerala State Govt.
- Currently in trial, generating livelihood for >100 women in 20 Microenterprises
- Supply of unadulterated, quality food to consumers
- A model for emulation in other districts & rest of India

About Kudumbashree

Kerala State Poverty Eradication Mission, launched 1998 by the **Kerala State Government** with the active support of Government of India and NABARD. **43 lakh women** are organised into **2.7 lakh Neighbourhood Groups**, operating in Microfinance, Microenterprises, Social Development and partner in NULM, NRLM and DDUGKY

Micro-Enterprise Catering units were struggling

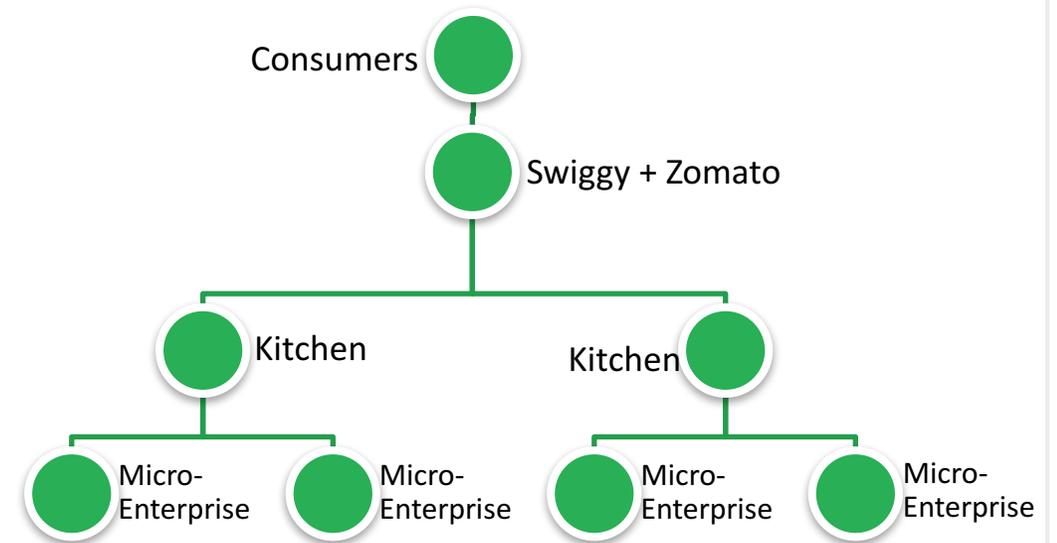
>20,000 micro enterprises | >150 Kudumbashree Café | **>1K Catering service units.**
Catering service units struggled due to 1) Lack of **access to urban markets** 2) Lack of **marketing skills**
3) Lack of **online market opportunities** 4) Inability to **scale**

The solution: Demand aggregation

A concept developed by Kudumbashree Facility Management Centre, this is a platform that **aggregates home-based-catering** micro enterprises to operate profitably at scale, offering both online and offline operations (initial funding: American India Foundation)

USP to Consumers

Authentic Kerala Cuisine (Naadan Bhakshanam) | Distributed in organic packages | Homely food with no artificial content | Lower prices as there is no large investment



Fed up with junk foods....?
Here comes homely food
at your finger tips....
Natural food With no artificial contents

Kudumbashree Kitchens

Vyttila, Kaloor, Kalamasserry, Kakkannad

Now at



What can be done to overcome challenges and entry barriers

Home-cooked meals

- The category of home-cooked meals needs to be distinguishable from restaurant-sourced meals, evangelized and built
- Building trust with consumers is paramount – this requires paying attention to quality, consistency and hygiene
- Consumers care about Taste – entrepreneurs should offer variety and go beyond tiffin-like services
- Entrepreneurs need to be equipped with resources on quality, hygiene, use of industrial-grade equipment for efficiencies, standardized recipes
- Evaluate the option of giving entrepreneurs access to a safe, hygienic, modern centre that takes care of secondary activities, where women can focus on cooking healthy meals
- Aggregators need to build an effective business model to ensure growth and margins as home-cooked meals have a lower price point compared to restaurants; establish a network and hyperlocal supply

Packaged Foods

- Building trust and reputation is a priority
- For online/e-commerce markets, focus on brand and modern, attractive packaging, a unique positioning
- New products can make their entry into offline retail through hyperlocal retailers, cafes, bakeries; build demand to ensure that the product moves fast in kirana stores
- Entry into large-format retail outlets will require capital due to competition with established brands (~40% margins), high listing fees, marketing spends

Interventions

What can be done

Entrepreneurial skills & mindsets

- | Interventions | What can be done |
|---|---|
| <p>1 Boost peer-to-peer connections & learning amongst entrepreneurs</p> | <ul style="list-style-type: none"> ▪ Weekly group discussions of members on challenges in setting-up & running preschool & daycare centers and how to overcome them (e.g. meeting regulatory requirements, issues in finding right manpower, access to funding, customer acquisition, pricing, branding & marketing) ▪ Online platforms like Facebook, Microsoft Kaizala, Whatsapp, to create online support groups to connect and discuss challenges and interventions
e.g. WhatsApp groups to connect entrepreneurs hyper-locally, Facebook communities like #Shemeansbusiness to start a chapter in Bangalore |
| <p>2 Disseminate success stories</p> | <ul style="list-style-type: none"> ▪ Periodic interactive sessions with successful founders of: <ul style="list-style-type: none"> – Large chain of preschools/daycares – Independent preschools & daycares – Social enterprises offering preschools/daycares ▪ Inspirational stories circulated within teachers' forums to encourage entrepreneurship |
| <p>3 Provide access to best-of-breed 'curriculum' for knowledge dissemination</p> | <ul style="list-style-type: none"> ▪ Emphasis on pedagogy and content that builds self-confidence amongst women to think big and increase their risk appetite (e.g. online course by Udemy on self-confidence) ▪ Organize monthly informative sessions from industry experts, successful entrepreneurs (e.g. Klay), other stakeholders (e.g. Akshaya Patra) to provide knowledge on specific topics (e.g. best practices for child-care, how to get day-care accredited, nutrition for day cares) ▪ Provide regular online course/ video sessions by experts on topics to help nurture soft skills ▪ Not-for-profits and Government to provide hand-holding and facilitation of curriculum and standards, information on compliances, relevant skilling courses at NSDC centres and certifications, entrepreneurship skills at skilling centers |

How 11 interventions play out in preschool & daycare sector (2/3)

Interventions

What can be done

Financial and business model support

- | Interventions | What can be done |
|---|--|
| <p>4 Enable entrepreneurs build clear business plans</p> | <ul style="list-style-type: none"> Organize periodic counselling/ mentoring sessions with industry advisors (e.g. session with representative from Sylvant Advisors to draft business strategy) Business templates for small day-care setups can be made available, with curated list of locally relevant partners eg corporates, curriculum-providers, franchisers |
| <p>5 Unbundle components for better unit economics for entrepreneur</p> | <ul style="list-style-type: none"> Identify and help entrepreneurs find cost-effective space providers (e.g. government school space) to set-up affordable / low-cost preschool/daycare centers Builders' associations to make common space at apartment complexes available to group of mothers to run day-care/pre-school – for children of all income segments (eg residents, staff) though both profit-making and non-profit approaches |
| <p>6 Unlock and demystify govt. support for entrepreneurship & drive policy changes</p> | <ul style="list-style-type: none"> Navigate regulatory environment to set-up governing policies for preschool/ daycare (e.g. credibility requirements of person operating a preschool/ daycare center) Drive discussion on policy changes to invoke government support for setting-up affordable day-care (similar to APS) Promotion and incentive package to stimulate and support the day-care industry, specially in cities with larger in-migration and white-collar employment opportunities for women |
| <p>7 Co-operative/group models for entrepreneurs who gain from working as a group</p> | <ul style="list-style-type: none"> Mothers and home-makers can band together to form co-operatives of day-care/pre-school in a locality or complex, ensuring flexi-working hours; supported by builders' associations, non-profits. |

How 11 interventions play out in preschool & daycare sector (3/3)

Demand & market linkages

Interventions

What can be done

- | | |
|--|---|
| <p>8 Connect with and champion for value-chain stakeholders and network</p> | <ul style="list-style-type: none"> ▪ Connect entrepreneurs with accreditation organizations like CENTA to help understand requirements and assess teacher competencies ▪ Connect with curriculum providers, marketing and branding experts, franchisers, large builders looking for on-site setups at complexes/sites, non-profits working with low-income families ▪ Corporates with CSR grants available for day-care and pre-school for blue-collar workers ▪ Connect with child-care and school associations for standards, tie ups on admissions, curriculum, etc |
| <p>9 Facilitate access to small-scale demand for learning & experimentation & help entrepreneurs find their value proposition</p> | <ul style="list-style-type: none"> ▪ Help matchmake parents with occasional and short-term (hourly, daily) creche/babysitting needs, with women in the neighbourhood who can provide the service ▪ Support women in offering short courses and camps during summer/Dussehra holidays across academia and extra-curricular activities, to build a clientele and get experience to help them transition to a more permanent business |
| <p>10 Discovery of corporate demand and augment interactions with demand generators to have common understanding of needs</p> | <ul style="list-style-type: none"> • Provide information on what Kidzee/ Eurokids expects from franchisees • Provide counselling & liaising help for small day-cares to scale their offering to corporates • Setup associations of day-care providers who can network with corporates • Establish platform for networking with schools |
| <p>11 Build an efficient 'registry' of entrepreneurs & subsequent clearinghouse of local supply and demand</p> | <ul style="list-style-type: none"> ▪ Maintain repository of entrepreneurs willing to set-up franchisees of established preschool/ daycare and connect them to demand side of Kidzee/ Eurokids, or with other entrepreneurs looking to scale-up through franchisee route |

Entrepreneurial skills & mindsets

Interventions

1 Boost peer-to-peer connections & learning amongst entrepreneurs

2 Disseminate success stories

3 Provide access to best-of-breed 'curriculum' for knowledge dissemination

What can be done

- **Weekly group discussions of members** on challenges in **setting-up & running parlor cum training institutes** and how to overcome them (e.g. addressing attrition, curating curriculum, acquiring trainees, pricing, branding & marketing, helping trained students to get started)
- **Online platforms** like Facebook, Microsoft Kaizala, Whatsapp, to create online support groups to connect and discuss challenges and interventions
e.g. WhatsApp groups, Facebook communities like #Shemeansbusiness to start a chapter in the city

- Periodic **interactive sessions with successful entrepreneurs**:
 - Small entrepreneurs trained in skilling institutes run by Pratham etc.
 - Founders of large branded training institutes (e.g. LTA for beauty)
 - Founders of branded captive training cum salon chain like YLG etc.
- Local inspirational stories on mass media

- Emphasis will be placed on **pedagogy and content** that builds **self-confidence** amongst women to think big and increase their risk appetite
- Organize **monthly informative sessions from industry experts** (e.g. founder of YLG), other stakeholders (e.g. Pratham) to provide knowledge on specific topics (e.g. customer relationship management, trainee mobilization, accreditation & international standards of beauty & wellness training)

Financial
and business
model
support

Interventions

What can be done

- | | |
|---|---|
| <p>4 Enable entrepreneurs build clear business plans</p> | <ul style="list-style-type: none"> Organize periodic counselling/ mentoring sessions with industry advisors (e.g. session with representative from SkillPlan to sharpen overall business plans) Business templates for small setups can be made available, with curated list of locally relevant partners eg input suppliers for training, beauty product manufacturers for cross-sell opportunities, wedding organisers, franchisers, curriculum providers |
| <p>5 Unbundle components for better unit economics for entrepreneur</p> | <ul style="list-style-type: none"> Identify, educate and help entrepreneurs leverage cost-effective models like staffing model Evaluate Rent-a-chair model for entrepreneurs to bring their own products and customers |
| <p>6 Unlock and demystify govt. support for entrepreneurship & drive policy changes</p> | <ul style="list-style-type: none"> Liaise with NSDC to provide support for entrepreneurs in terms of standardization and accreditation with skill development council Navigate policy change to include training in entrepreneurship as part of NSDC curriculum Mobilisation of trainees from NSDC's skilling centres Evaluate incentivisation through apprenticeship scheme |
| <p>7 Co-operative/group models for entrepreneurs who gain from working as a group</p> | <ul style="list-style-type: none"> Women can band together to form co-operatives for setting up salon-and-training institutes in beauty and wellness, meeting their need for flexi-working hours, and complementing each others' specialisations to offer comprehensive salon and training services Avail other benefits eg access to group loans |

Interventions

What can be done

Demand & market linkages

- | | |
|--|---|
| <p>8 Connect with and champion for value-chain stakeholders and network</p> | <ul style="list-style-type: none"> ▪ Connect entrepreneurs with NSDC / skilling consultants on requirements from skilling centers for support and talent ▪ Bring in financial institutions to establish loan package for trainees ▪ Connect with franchisers to understand demand and build a pipeline for graduates, Entrepreneurship development organisations, non-profits and government to support trainees, Curriculum providers such as Aptech ▪ Connect with organisations seeking trained service partners eg UrbanClap |
| <p>9 Facilitate access to small-scale demand for learning & experimentation</p> | <ul style="list-style-type: none"> ▪ Help set-up home-based beauty skilling institute on a trial basis by connecting to localized demand pool (e.g. medium-sized salons in the vicinity) |
| <p>10 Discovery of corporate demand and augment interactions with demand generators to have common understanding of needs</p> | <ul style="list-style-type: none"> ▪ Facilitate interactive sessions with industry leaders like Lakme and UrbanClap to help understand industry requirements for micro-market trainers, and curate training curriculum for relevance |
| <p>11 Build an efficient 'registry' of entrepreneurs & subsequent clearinghouse of local supply and demand</p> | <ul style="list-style-type: none"> ▪ Maintain repository of entrepreneurs offering training in beauty & wellness and connect them to demand side of organized salons like YLG, Naturals etc. |

NON-EXHAUSTIVE

What can be done to overcome challenges and entry barriers

Day-care/ Preschool

- Day-care needs to be evangelized as a viable and dignified profession
- There is a need to educate the market to professional day-care as an alternative to existing methods (family, domestic help); and to alleviate the social stigma of using professional day-care
- New businesses need to focus on solving for the primary decision drivers of price, proximity, quality and safety

TVET (beauty & wellness entrepreneurship)

- Lay emphasis on talent management and maintaining quality
- Franchisers look for those with people management, leadership and business skills, hence all are important
- Quality of education imparted makes a huge difference: there are certain minimum standards to be met, which will be a differentiator compared with many existing options
- NSDC compliance will help with scaling

India currently ranks 121st of 131 countries in female labour force participation*. It is imperative to address this in mission mode, to find a path to bring back the missing women in the workforce, as the country becomes more industrialised.

We set out to look into which sectors could offer mass entrepreneurship opportunities to urban women (specifically those with some home-care responsibilities but eager to generate an income) and how could those opportunities be best unlocked. We found that the Food and Education sectors provided the highest economic potential at scale, easy-to-start business models at/near home, and had larger numbers of employed and enterprise owners forming a ready talent base.

Within these, certain sub-sectors can be catalyzed through a range of interventions that require both high-touch physical (eg: community-centers) as well as digital delivery modes. Market sensitivity and relevance is crucial for the sustained success of women-owned businesses, and this can be achieved through early engagement and close partnerships with demand-side players: corporates, industry associations, demand aggregators, etc. It will require co-ordination and active engagement in the part of all players to bring efforts of government and non-profit entities in line with business expectations of for-profit enterprises.

This study and report would not have been possible without the support of several individuals and organisations; our well-wishers, advisors, partners, experts, industry players, who gave so generously of their time and expertise. We are extremely grateful to:

- The committed research team that worked on the various elements of the report
- All those who graciously accepted and participated in the Food and Education sector solutioning workshops (a list is given in the following slides)
- Industry experts who provided valuable insights and recommendations
- The leadership team at Facebook and GAME for their guidance and resources that made the study possible.

- GAME Research

Industry leaders at the Food sector workshop

Category	Perspectives	People who attended			
1 Food service	<ul style="list-style-type: none"> Business opportunities in homecooked meals/ cloud kitchen / catering 	 <p>Rashmi Daga Founder – Freshmenu</p>	 <p>Saumya Dubey Product Manager Swiggy</p>	 <p>Rachna Rao Co-founder – Foody-Buddy</p>	 <p>Pavandeep Singh Co-founder - Tasty Tales</p>
2 Food merchandisers	<ul style="list-style-type: none"> White spaces and potential for artisanal / home-made food products 	 <p>Seshu Kumar Head- Buying & Merchandising – Big Basket</p>	 <p>Hrishikesh Thakur Coordinator – Café Kudumbashree Govt of Kerela SRLM</p>	 <p>Dilraj K Manager, Kudumbashree Kitchens, Govt of Kerela SRLM</p>	
3 Experts / enablers	<ul style="list-style-type: none"> Specialists - market insights on business operations e.g. quality, licenses, packaging Venture Capital – feasibility / scalability of ideas (unit economics perspective) 	 <p>Ajay Macaden ED– Nielsen</p>	 <p>Pradnya Godbole CEO – deAsra Foundation</p>	 <p>Srinivas Murthy FMCG Expert- ex Coca-Cola, GSK</p>	
4 Entrepreneurs	<ul style="list-style-type: none"> 3-4 current / potential food entrepreneurs 	 <p>Basabi Sengupta</p>	 <p>Deepali Sawant</p>		
5 Policy support	<ul style="list-style-type: none"> Government schemes and policies that enable women entrepreneurs set up/scale businesses 	 <p>Swaroop Commissioner's office – MSME, Govt of Karnataka</p>			

Design thinking workshop for Food sector



Industry leaders at Education sector workshop

Category	Perspectives	People who attended			
1 Pre-school and creche founders	<ul style="list-style-type: none"> Business opportunities in corporate creches and franchised preschools 	 <p>Anju Cherian Director The Alchemy Nursery</p>	 <p>Priya Krishnan Founder Klay</p>	 <p>Neelu Kapur Founder First Steps Nursery School</p>	
2 Tuition & Vocational education	<ul style="list-style-type: none"> Opportunities in the K12 tuitions & vocational education space 	 <p>Bimaljeet Bhasin <i>President, Skills & Careers NIIT</i></p>	 <p>Pavithra K.L Associate Director Dream A Dream</p>	 <p>Sivaram Rajangam CEO Skillplan</p>	
3 Venture Capital	<ul style="list-style-type: none"> Feasibility / scalability of ideas (unit economics) 	 <p>Sunita Vishwanathan <i>Lead, Employability sector</i> Unitus</p>	 <p>Anand Sudarshan Founder & Director Sylvant Advisors</p>		
4 Enablers	<ul style="list-style-type: none"> Government policies Curriculum expertise (design & delivery) Teacher capacity building 	 <p>Ramya Venkataraman Founder & CEO CENTA</p>	 <p>Brinda Kathrani Pre-school Curriculum Consultant</p>	 <p>Vaijayanti Co-founder YLG</p>	 <p>Priyansha Rawat State Engagement Asst. NSDC</p>
5 Entrepreneurs	<ul style="list-style-type: none"> 3-4 current / potential education entrepreneurs 	 <p>Prapulla Sandeep Hippocampus</p>	 <p>Saumil Majmudar CEO & MD SportZVillage</p>	 <p>Shraddha Deo CEO Sneh Foundation</p>	

Design thinking workshop for Education sector





Thank You