THE PARTHENON GROUP

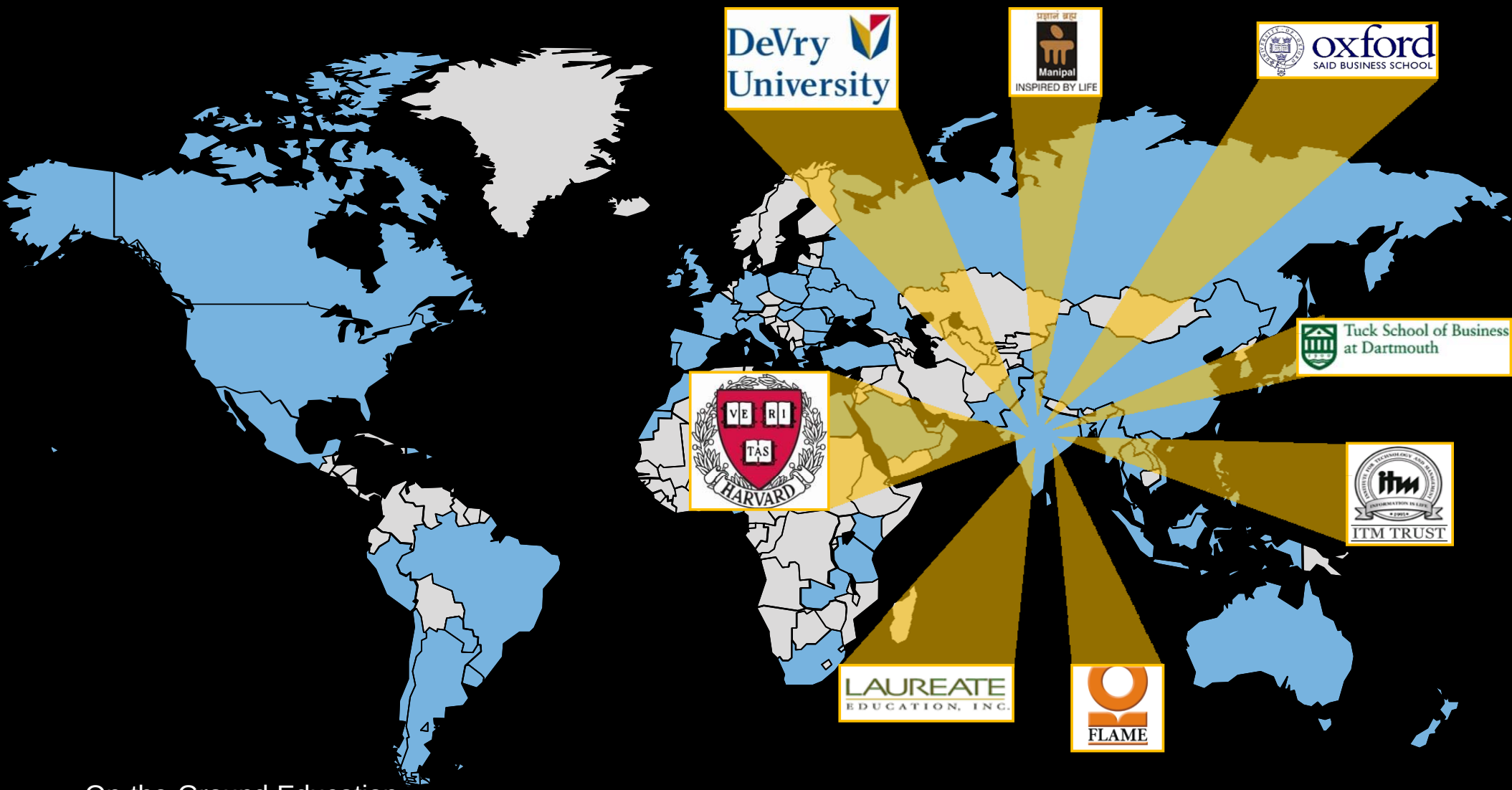
PRIVATE UNIVERSITIES IN INDIA

An Investment in National Development

Prepared by The Parthenon Group

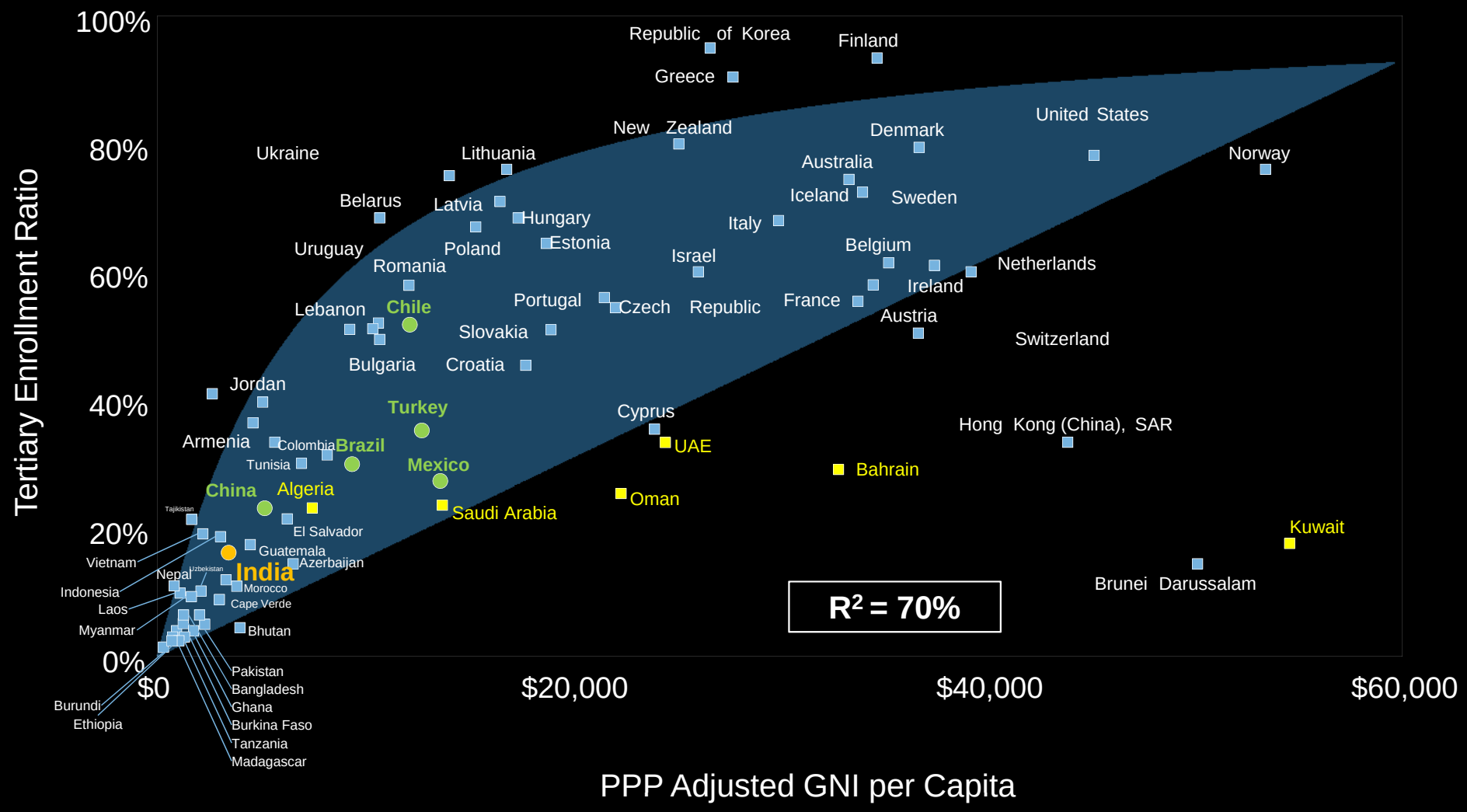
for EDGE 2012

Parthenon's Education Practice

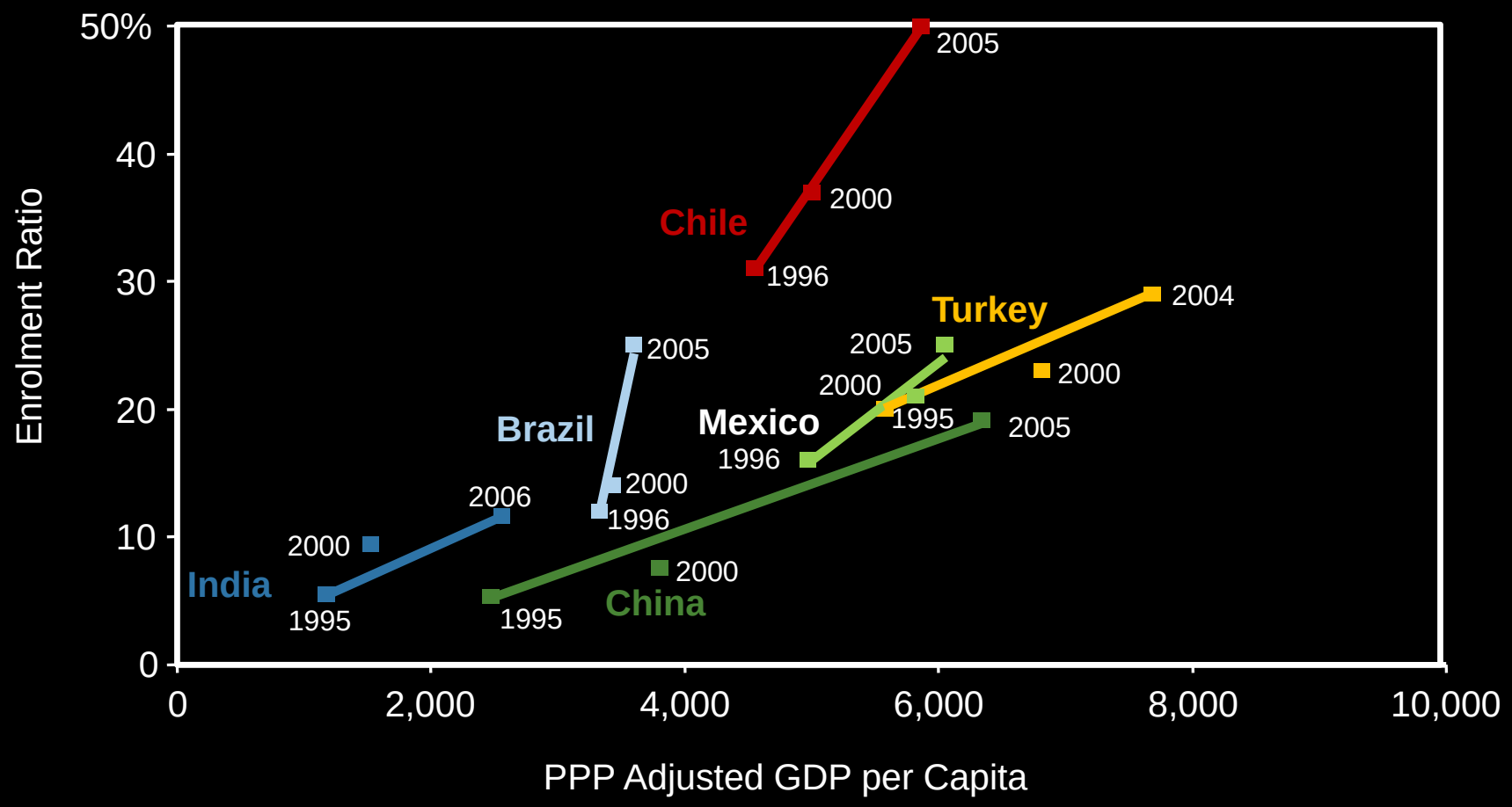


On-the-Ground Education Sector Projects Completed by Parthenon

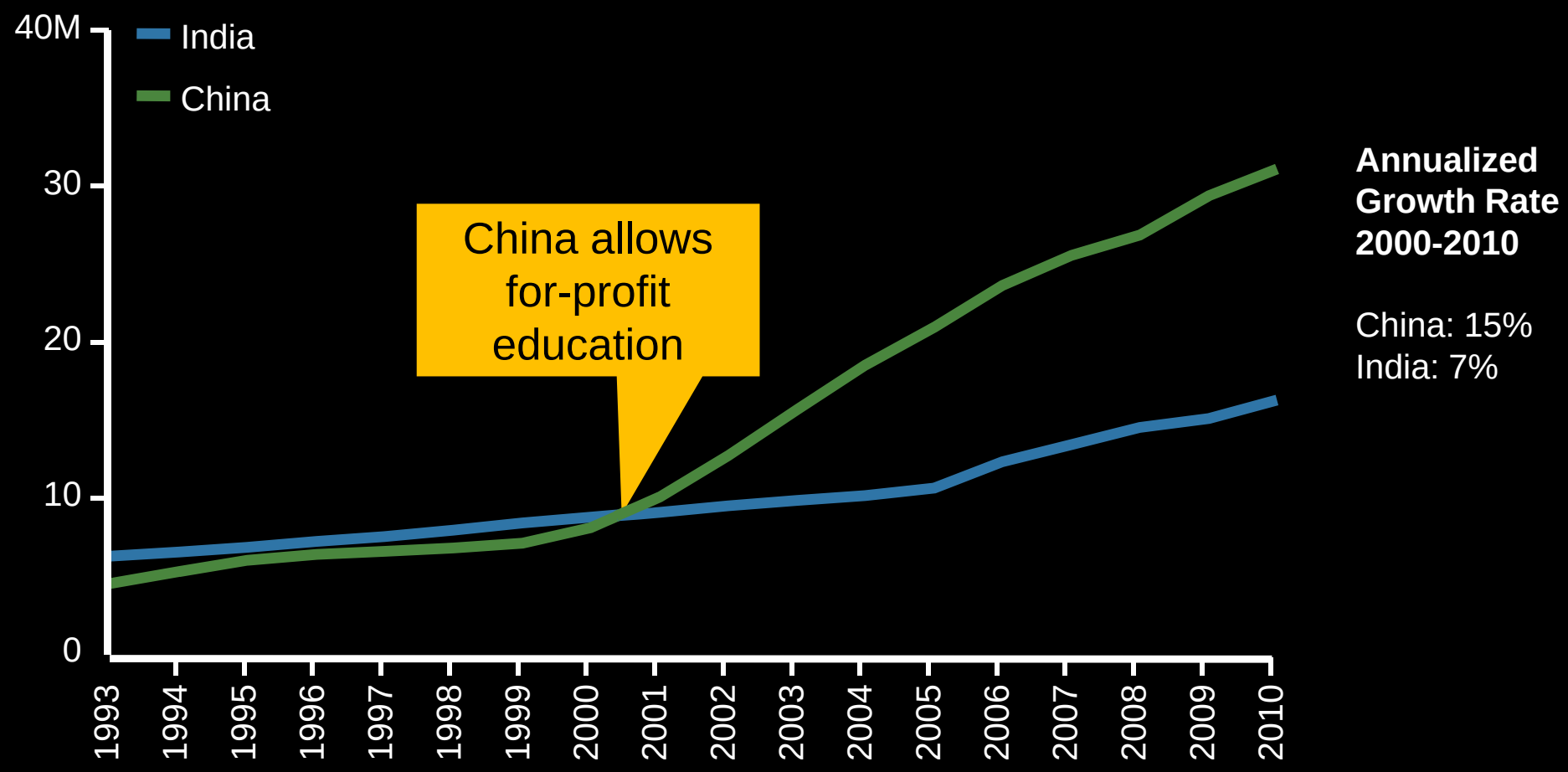
Higher Education Enrolment vs. Income



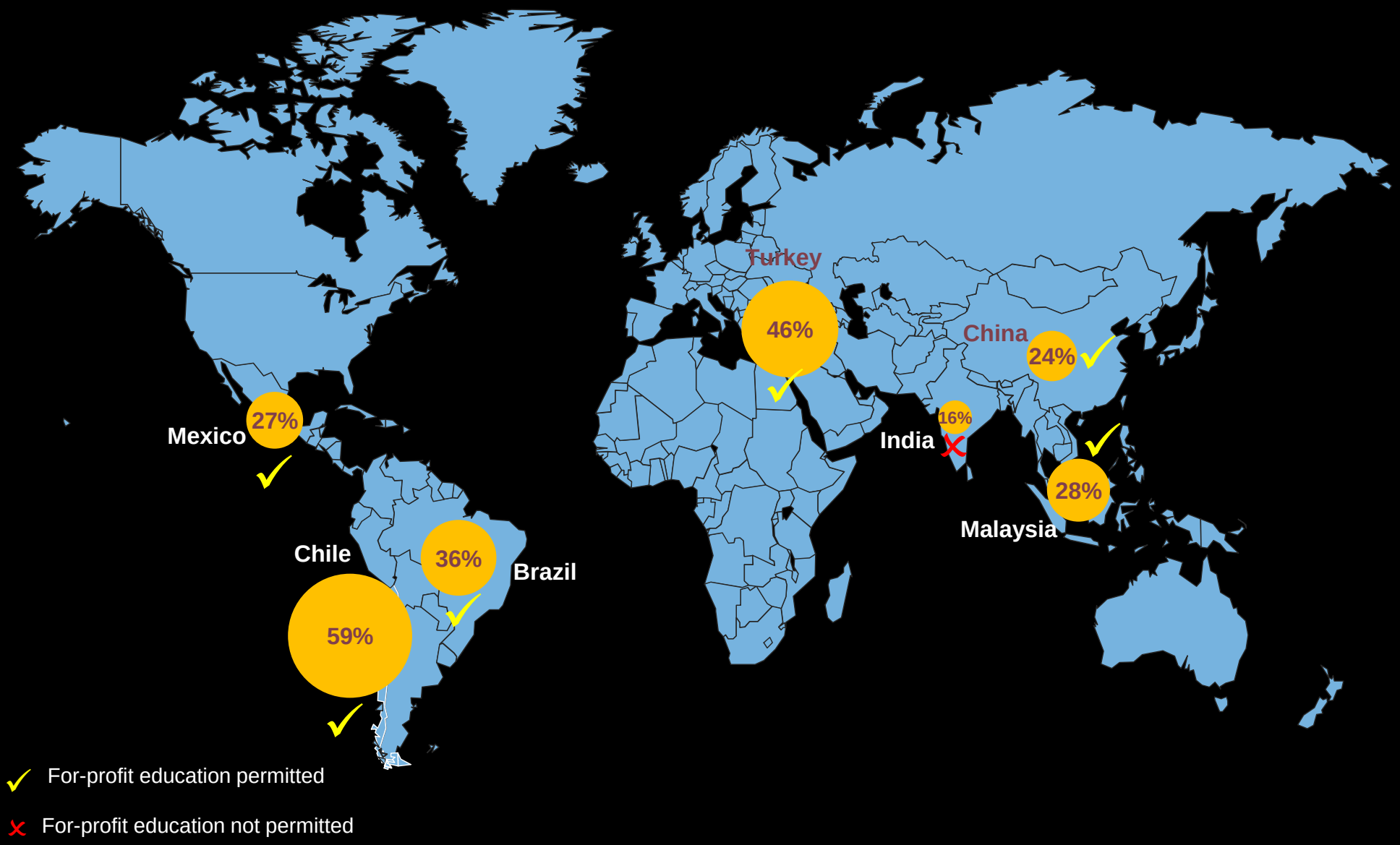
Higher Education Enrolment vs. Income



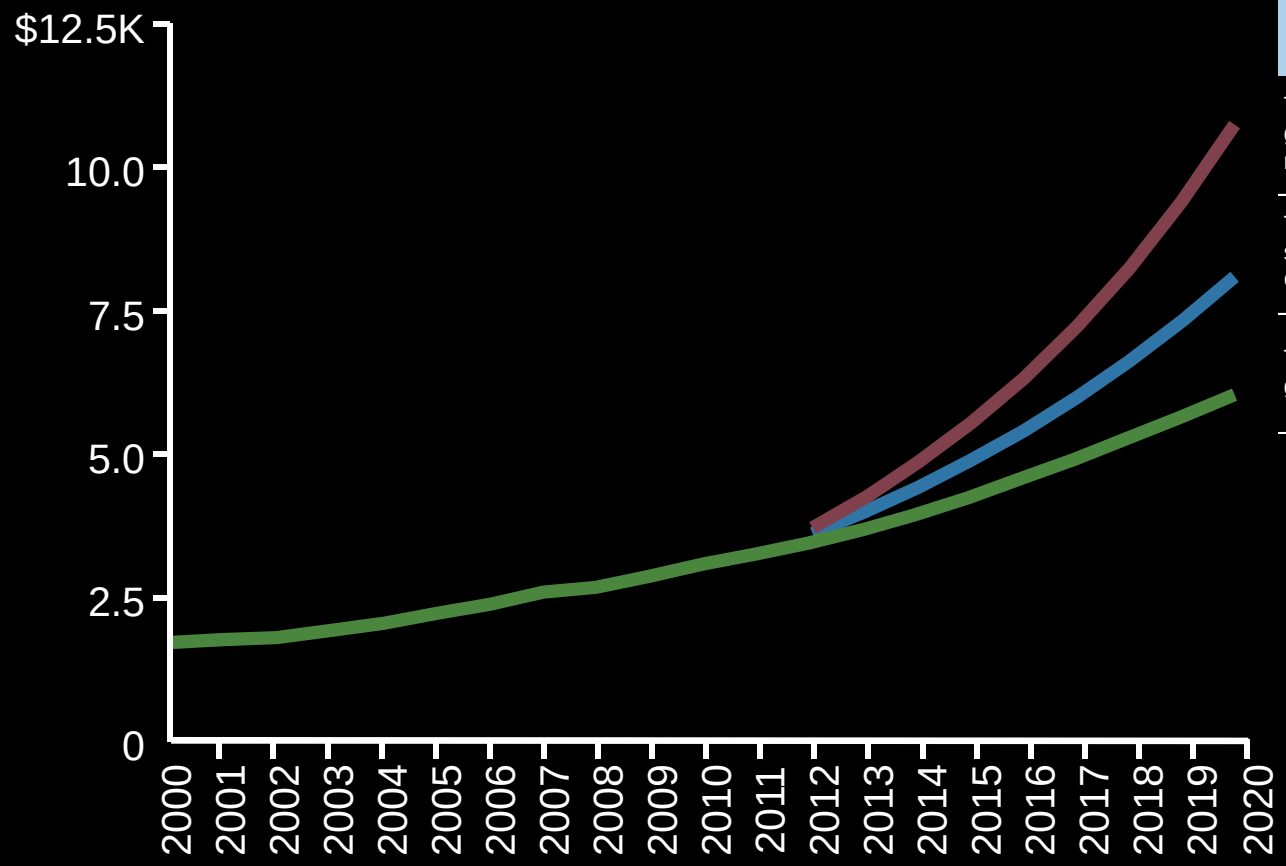
Number of Students Enrolled in Higher Education (Degree & Diploma)



Tertiary Enrolment Ratio by Country and Allowance of For-profit Higher Education

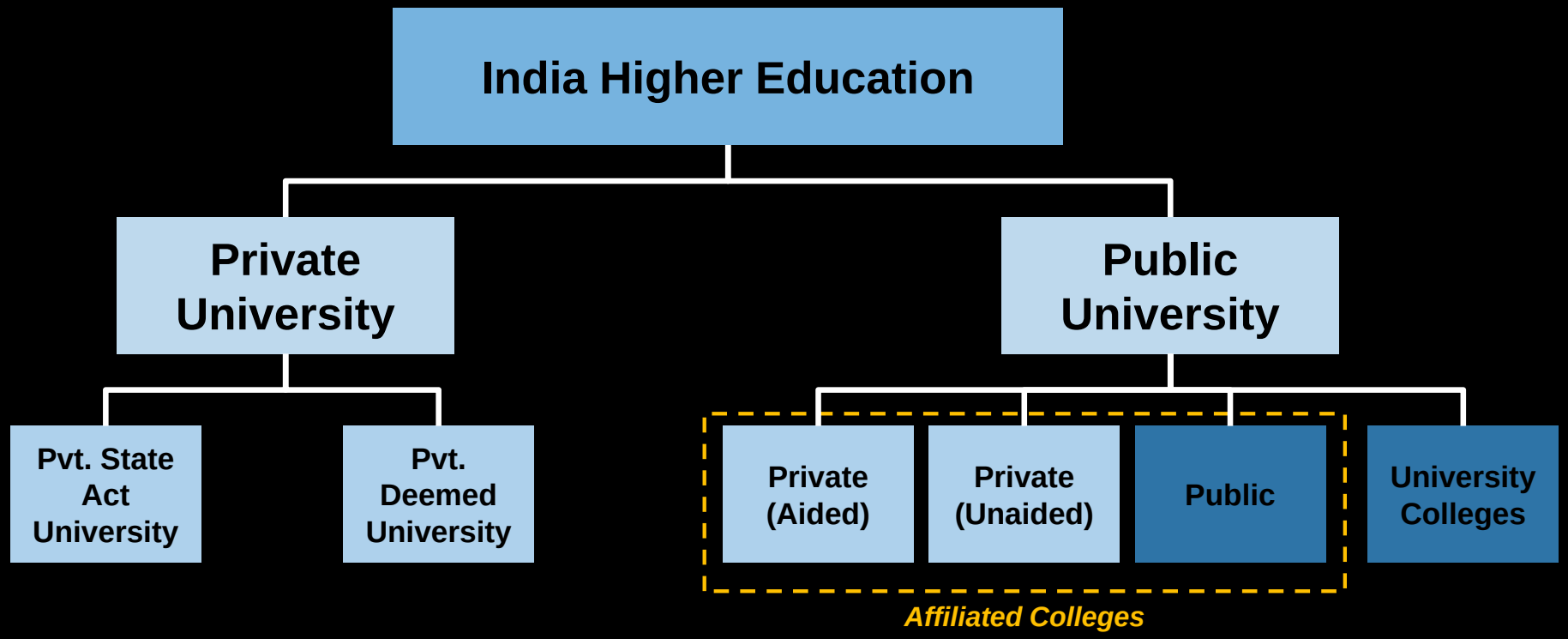


Higher Education Enrolment Growth Required by Growth Scenarios

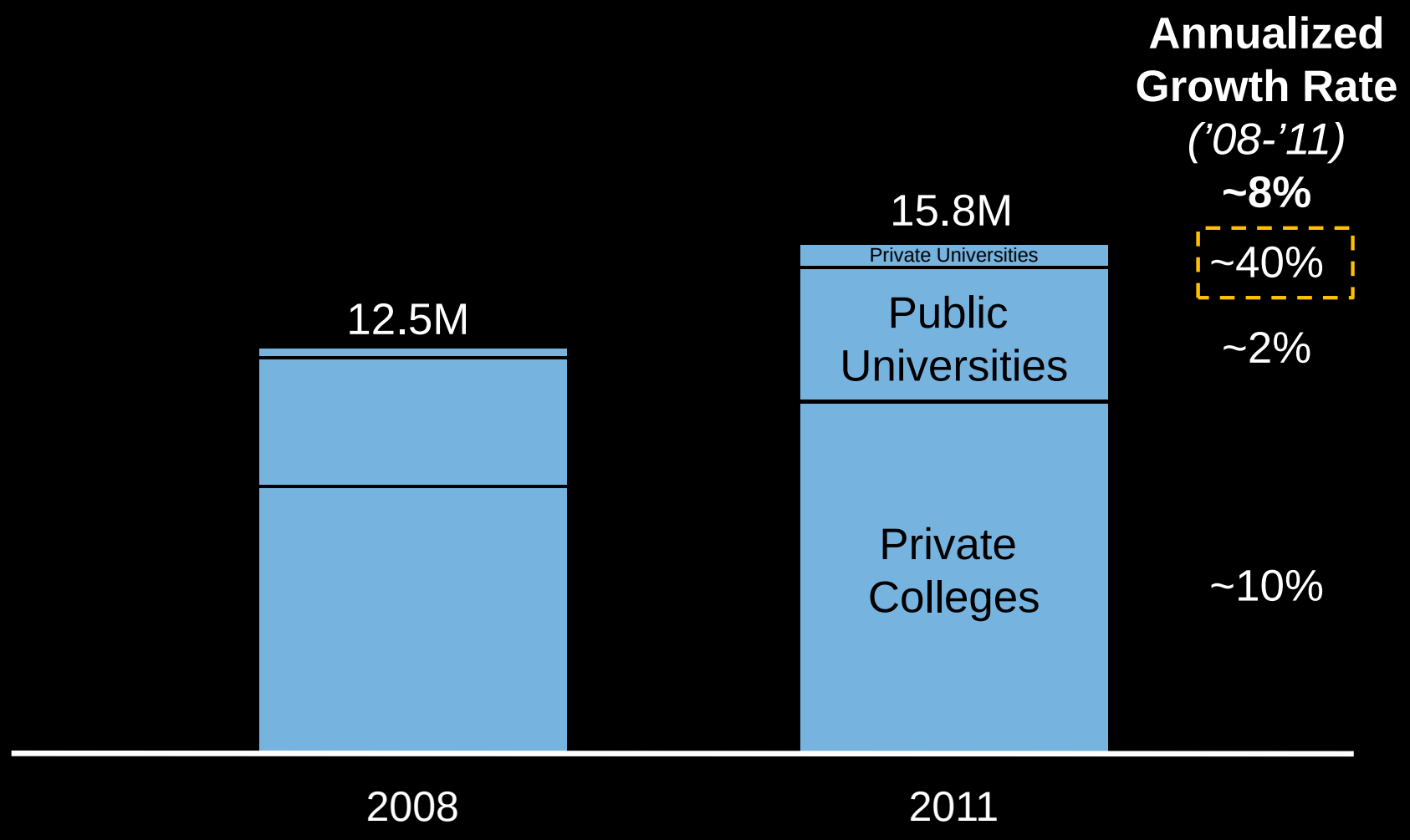


India Growth Scenario	Annual Incremental Enrolment	Annual Minimum CapEx Required
Tertiary enrolment grows at same rate as China	2.7M	Rs.27,000 Cr
Tertiary enrolment grows such than India's 2020 GDP per capita =$8K	1.8M	Rs.18,000 Cr
Tertiary enrolment grows at historic rate	0.9M	Rs.9,000 Cr

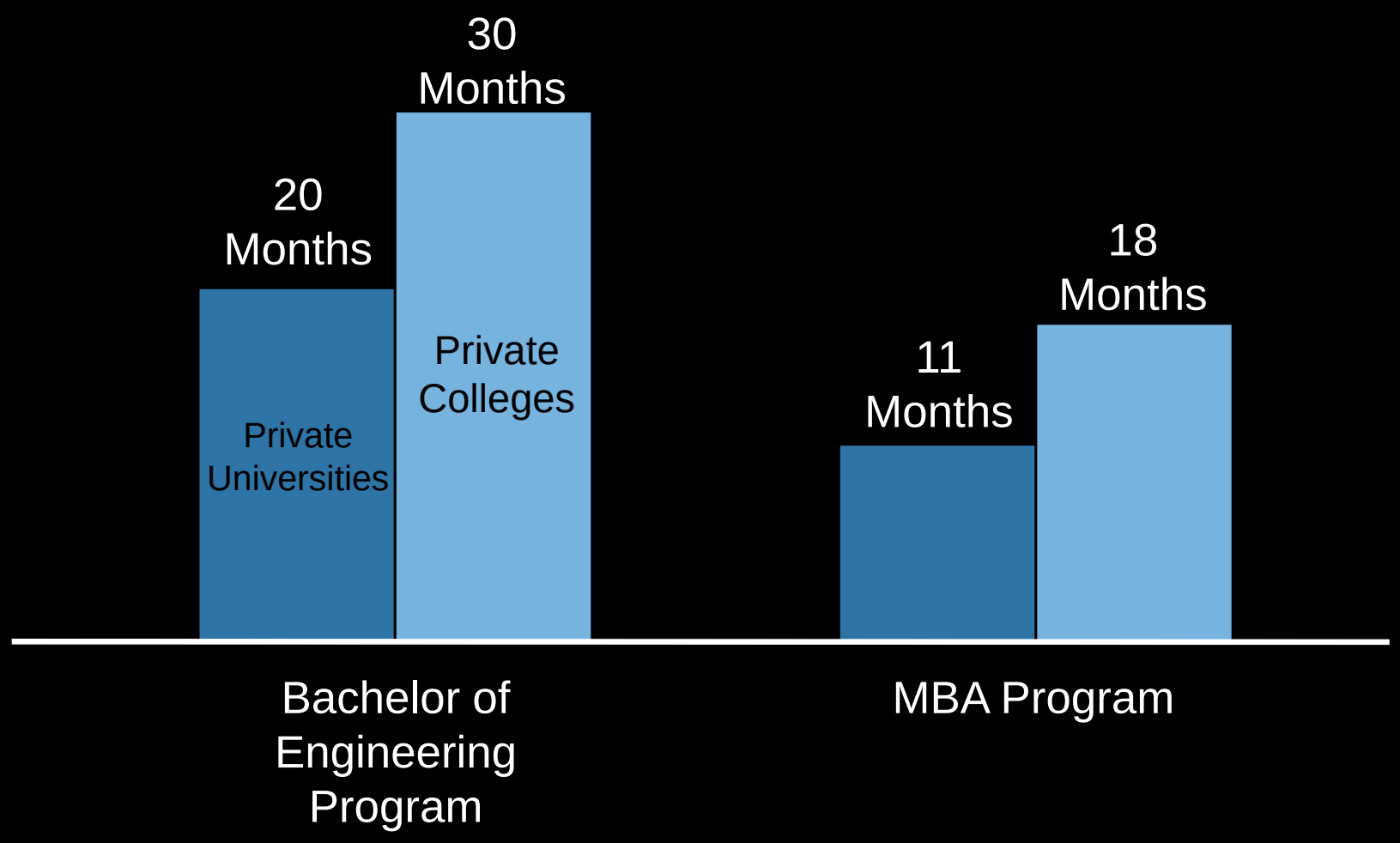
Current Indian Higher Education Landscape



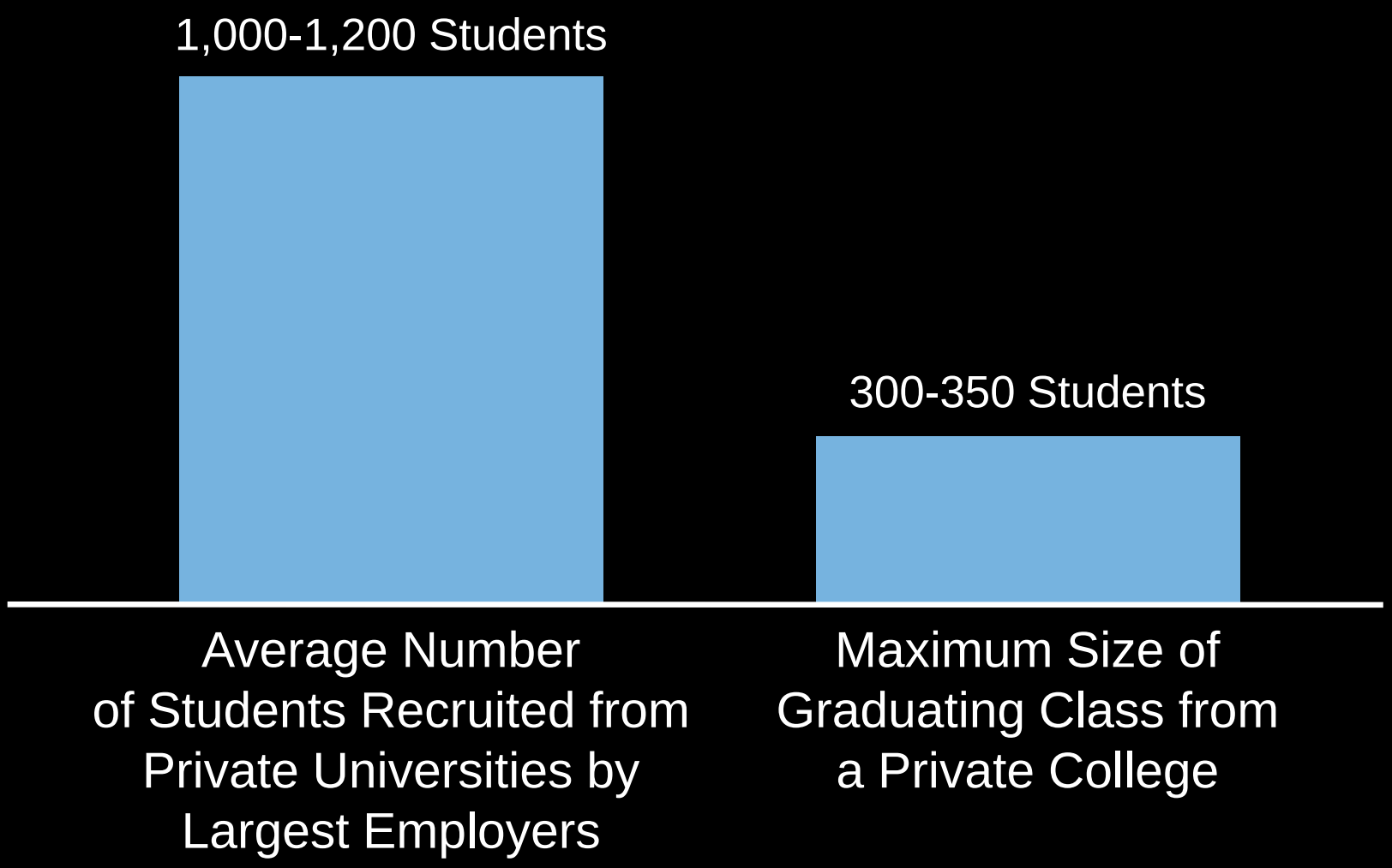
Indian Higher Education Enrolments by Type of Institution, 2008-2011



Average Payback Period for Private Universities by Course Type

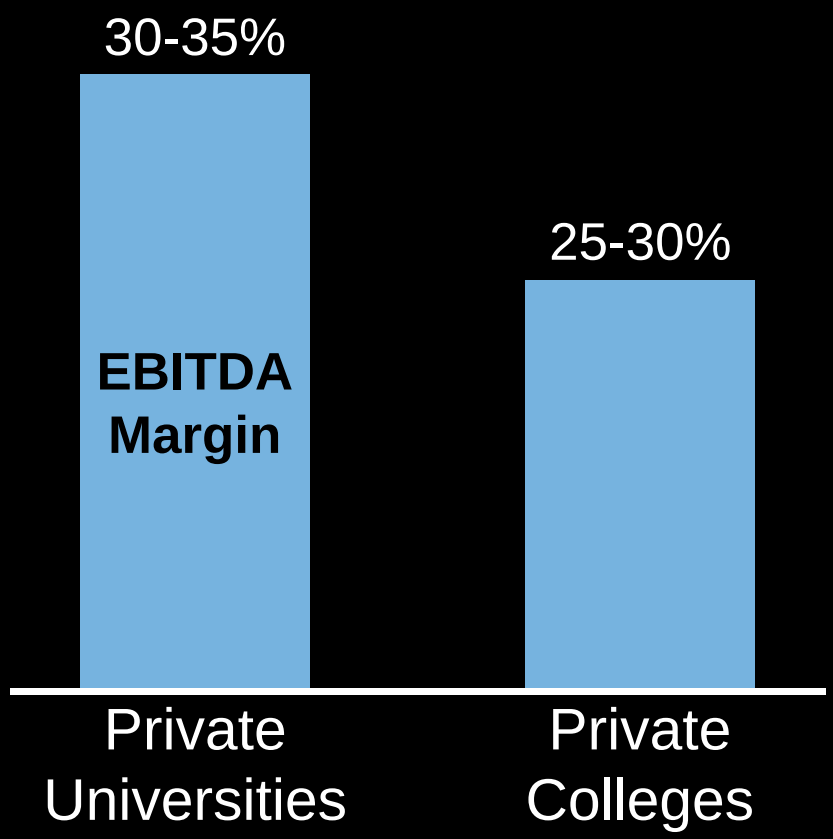


Comparison of Students Recruited from Private Universities with Scale of Graduation Class from Private Colleges

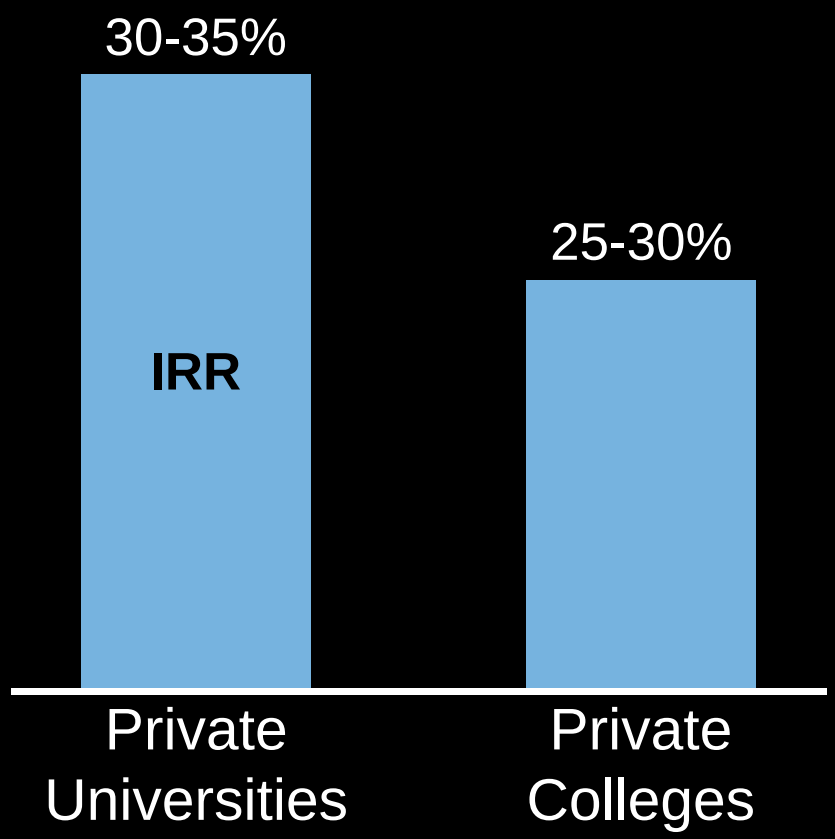


Comparison of Key Financial Metrics of Private Universities and Private Colleges

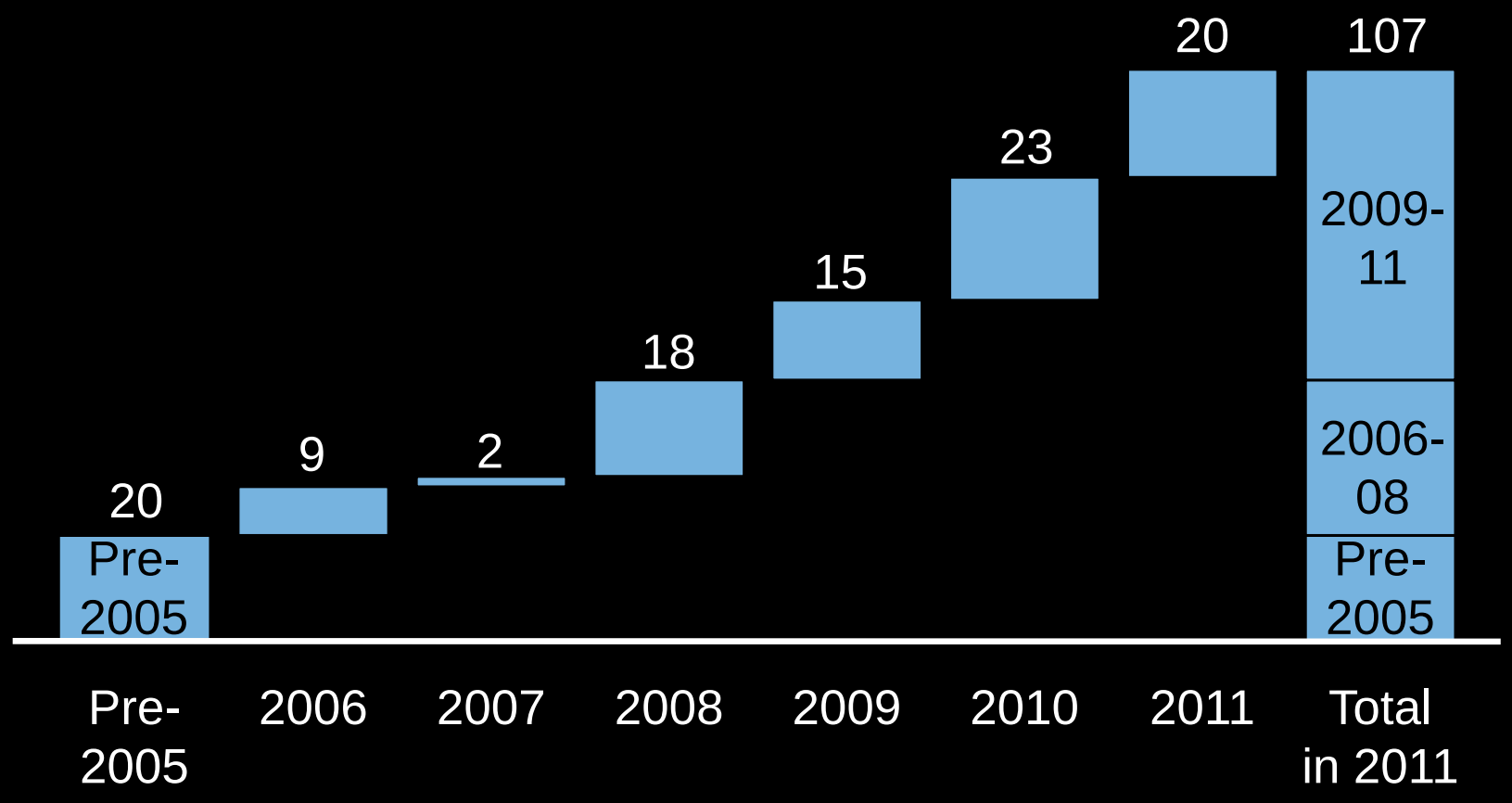
EBITDA Margin Comparison
(At the scale university level)



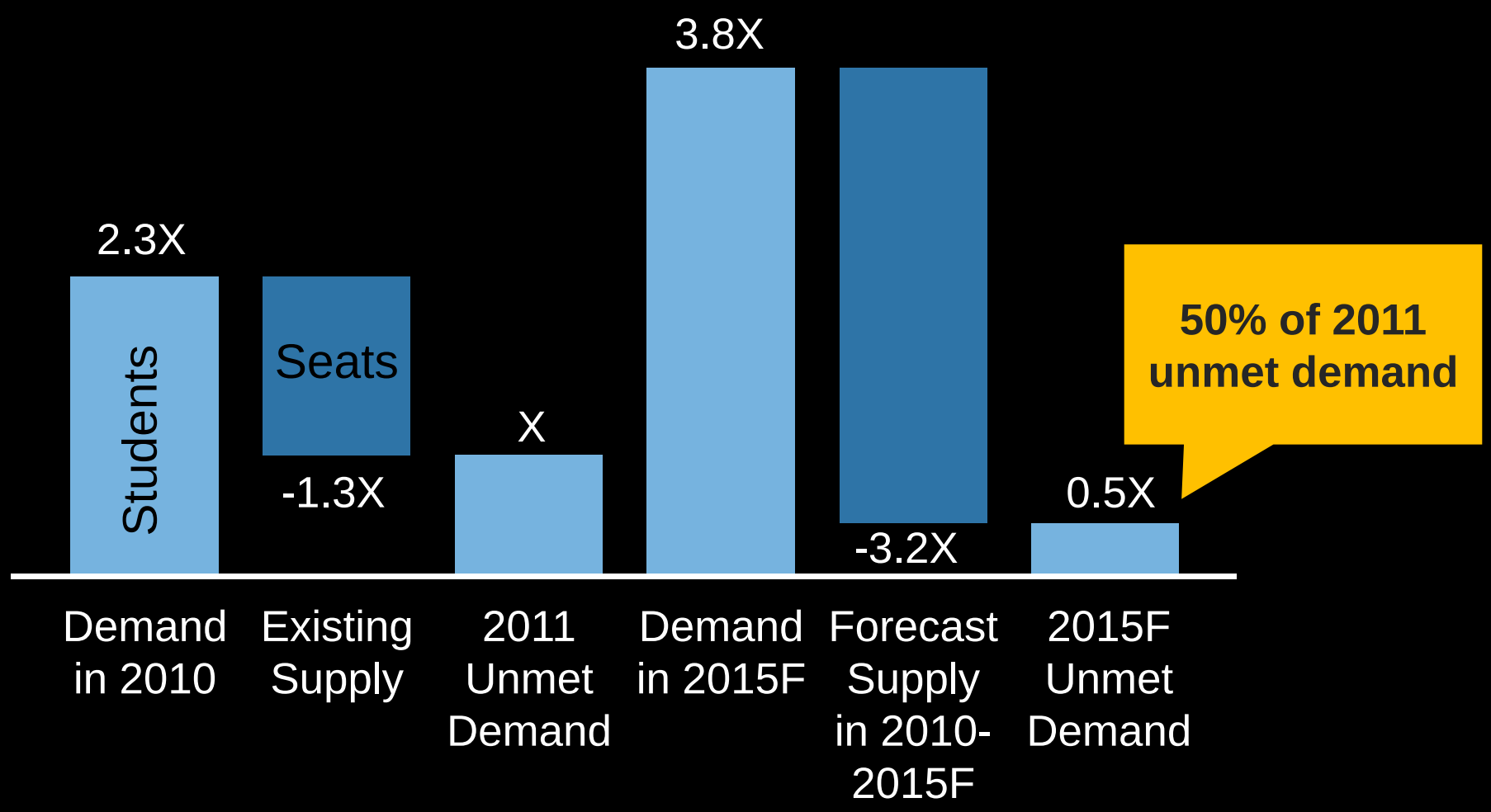
IRR Comparison



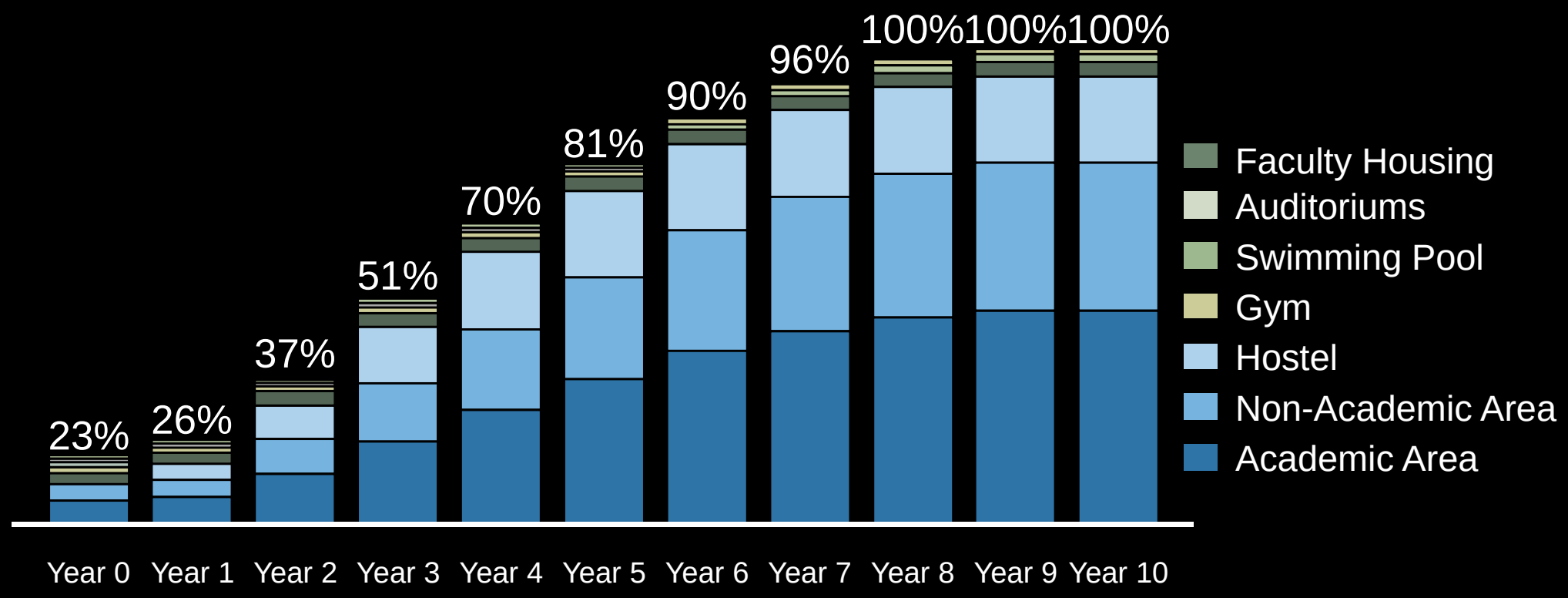
Number of Private State Act Universities in India by Year of Opening



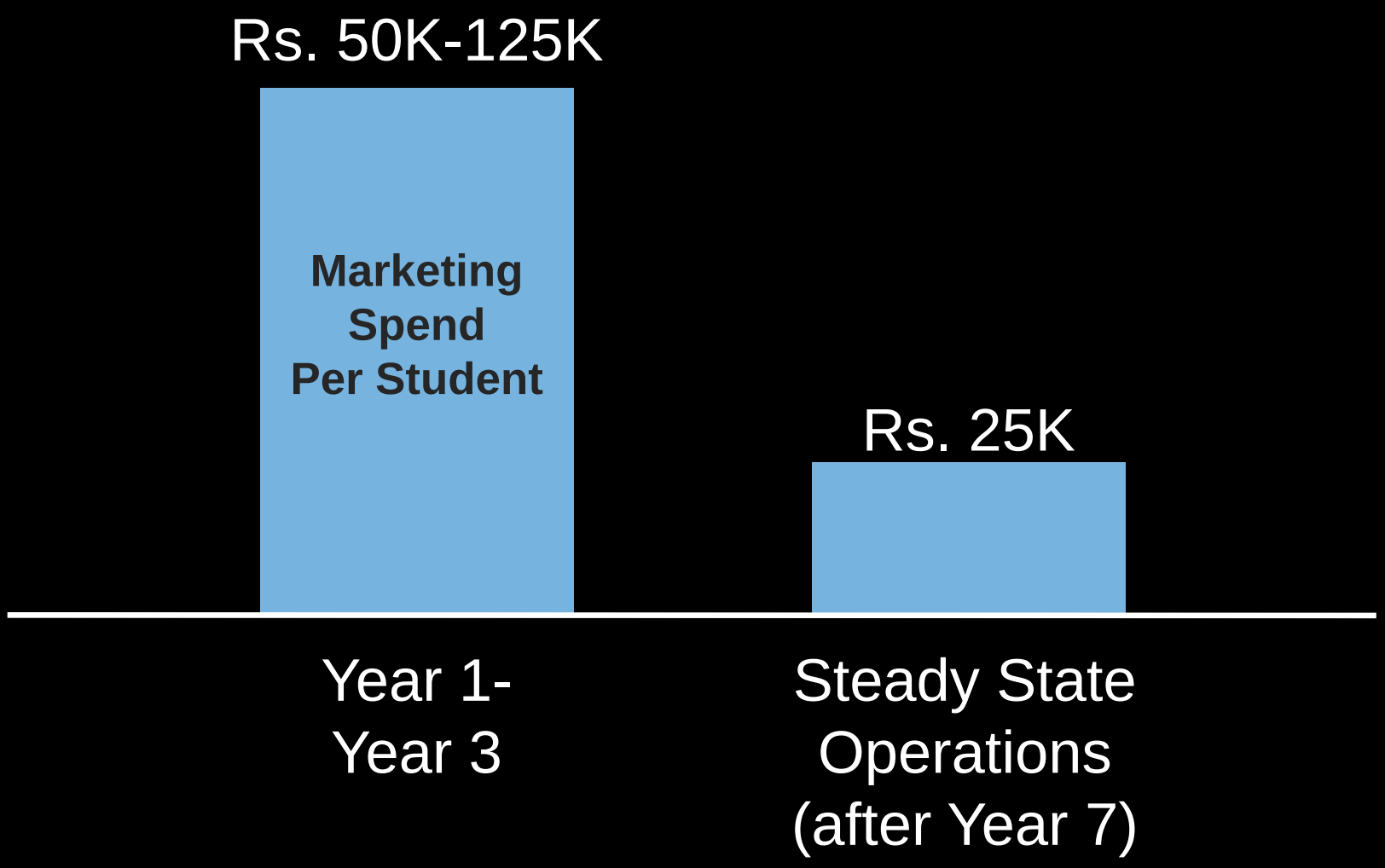
Demand vs. Supply Scenario in North India, 2010-2015F



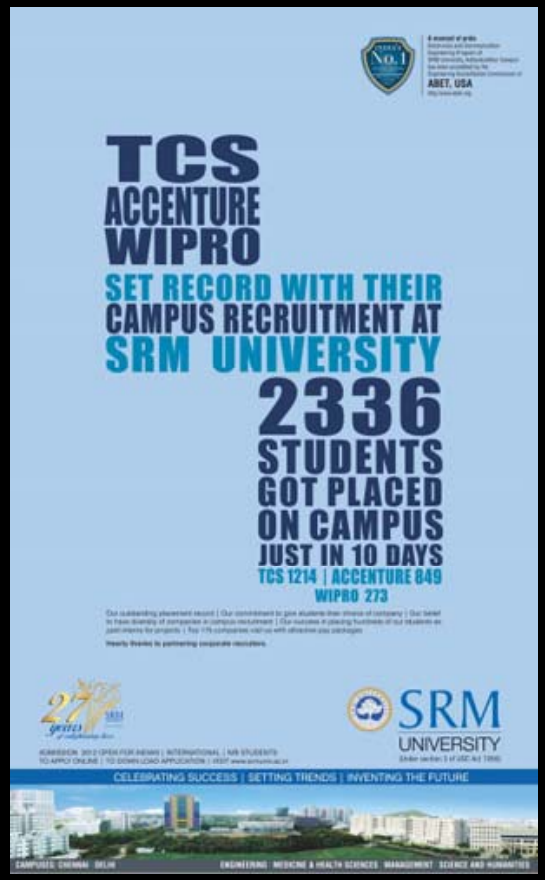
Optimal Ramp-up of Built Area for a Scale Private University, Year 0 to Year 10



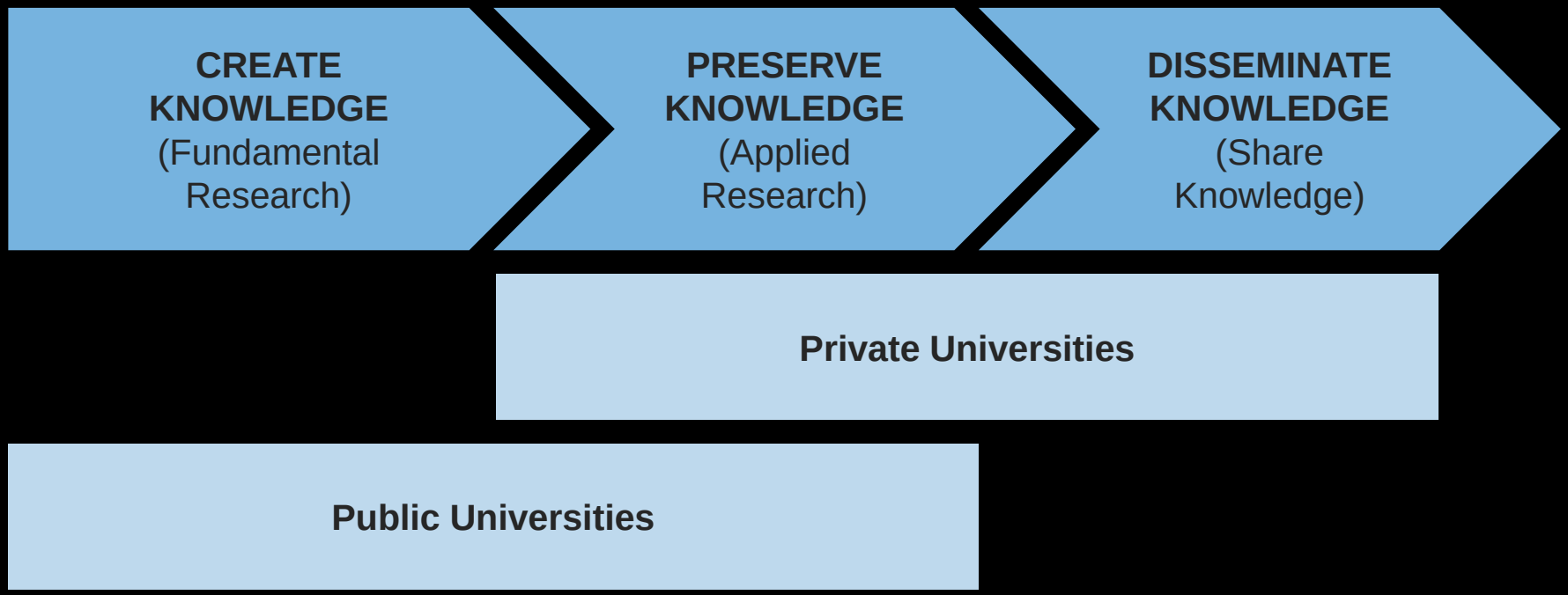
Marketing Spend per Student for a Private Scale University



Examples of Marketing by Private Universities



Goals of Higher Education Institutes in India



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About The Parthenon Group's Education Practice

The Parthenon Group is a leading advisory firm focused on strategy consulting, with offices in Boston, London, Mumbai, and San Francisco. Parthenon's Education Practice is the largest advisory team to focus on the education sector, both for-profit and non-profit/government. Parthenon has 40 professionals focused on advising the MENA and Asian education sectors. The Education Practice is a leading advisor to the global education industry with clients across diverse sectors that include publishing, primary and secondary education, higher education, consumer education, vocational education, corporate training, governments, foundations, NGOs, and other non-profit organizations. Parthenon completes more than 150 education projects per year in over 60 countries globally.

Learn more about our Education practice at **www.parthenon.com/industries/education**

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