# The Director's Atlas

Sector Outlook



### Market size and valuation

- ~$1.2B - $1.8B market estimate
- High-volume outbound growth
- 11-13% CAGR from students and leisure

### Primary economic engine

Mass outbound migration for higher education, STEM labour export, and growing leisure / business travel.

## Boardroom Focus

01 **Allocate capital and strengthen rupee collections**

02 **Expand global VAC capacity and adopt enterprise AI**

03 **Negotiate INR-denominated fees with foreign missions**

**For Business, Finance and Function Directors:**
A starting point for roundtable conversations on growth, resilience and stakeholder alignment.

# Transformations Our Programs Deliver

OUR COACH

**For Business, Finance and Function Directors**

| Two outcomes | Foresight to lead through disruption.<br>Influence to align stakeholders before action.<br>Camera confidence, eloquence, vocal gravitas and a six-week peer network. |
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## 01 ENTERPRISE RESILIENCE

Foresight → Recognised Strategic Leadership

**INSIDE YOUR COMPANY**

Be recognised as the director who identifies structural shifts early and turns them into a clear agenda for investment and action.

**OUTSIDE YOUR COMPANY**

Build a reputation for judgement that clients seek by name, partners trust and competitors benchmark against.

## 02 STAKEHOLDER ALIGNMENT

Functional Authority → Enterprise-wide Influence

**INSIDE YOUR COMPANY**

Build a function backed by peers and the C-suite. Articulate ideas with clarity, eloquence and vocal gravitas, with confidence in the room and on camera.

**OUTSIDE YOUR COMPANY**

Be known for ethical influence and strategic judgement, supported by a trusted peer network built over six weeks.

# Five paradigm shifts

What changes the basis of competition

### 01 Structural

Fixed VAC dependency → distributed biometric submission.

### 02 Technology

Manual document checking → AI vision and OCR triage.

### 03 Evidence and trust

Agent-led paper checks → real-time verification.

### 04 Economics

High consultation fees → B2B subscription platforms.

### 05 Socio-cultural

Visa processing → mainstream education and career infrastructure.

**FOR YOUR NEXT LEADERSHIP DISCUSSION**

Which of these shifts could change your competitive position - and which is missing from your leadership agenda?

# Opportunity & Disruption

Where value can move in visa services

### 01 Market opportunity

AI-assisted visa documentation and processing platforms for agents, students and mobility desks.

### 02 Disruption

Rejections, scarce appointment slots, shifting visa rules and higher proof standards.

### 03 Sector impact

Fraud, delays and poor transparency can slow enrolments, travel and corporate mobility.

### 04 Strategic response

Real-time slot trackers, document pre-checks, agent portals and trusted data trails.

**Opportunity → Disruption → Impact → Strategic Response**

# Sector Movement

Signals to fund, reshape or leave behind

EVOLVE

## Reshape existing lines

Student recruitment, corporate mobility, verification technology and cross-border FX.

SURGE

## Scale emerging lines

AI filing platforms, INR fee portals and corporate mobility desks.

SHRINK

## Reduce exposure

Traditional agents, document runners and unhedged fee brokers.

SUNSET

## Exit structurally weak models

Paper-based agents, unhedged foreign-fee collection and unverified document shops.

FOR YOUR NEXT LEADERSHIP DISCUSSION

What should your business fund, reshape or stop - and where does the leadership team disagree?

# Governance Agenda

Regulatory and board priorities

## 01 Regulatory drivers

- MEA guidelines for agents and service providers
- DPDP Act / Rules - privacy, consent and phased compliance
- FEMA / RBI rules for remitting consular fees to foreign missions

## 02 Board oversight priorities

- Scale digital processing capacity without weakening trust
- Ensure DPDP compliance, auditability and customer-data discipline
- Build direct consular API integrations where commercially viable

# Director's Future Role

Strategy, finance and operations

### Strategy

Model geopolitical visa-quota shifts and track B2B mobility demand.

### Transformation

Shift paper processing to AI-enabled workflows with governance controls.

### Finance

Rework SaaS margins, INR collections and multi-currency fee exposure.

### Risk & Compliance

Audit AI decisions for bias, fraud and DPDP compliance.

### Operations

Streamline biometric hubs, capacity planning and AI processing queues.

### Supply Chain

Secure biometric hardware, scanners and mission-critical vendors.

**FOR YOUR NEXT LEADERSHIP DISCUSSION**

Are strategy, finance and operations working from the same assumptions about growth, investment and risk?

# Director's Future Role

Commercial, customer and product

### Quality & Excellence

Own accuracy, speed and error reduction across AI-assisted processing.

### Business Development

Grow partnerships with travel desks, universities and study-abroad agents.

### Sales

Lead B2B visa SaaS adoption through education and mobility aggregators.

### Marketing

Position platforms on processing speed, trust and approval transparency.

### Client Experience

Use multilingual AI support for real-time application updates.

### Product & Technology

Govern AI architecture and dashboards for scale, accuracy and usability.

# Director's Future Role

Data, people and governance

### Data & Analytics

Analyse approval trends, appointment availability and service leakage.

### Information Security

Set zero-trust, encryption and vendor-risk expectations.

### People & Culture

Retrain agents for digital visa operations and trusted advisory.

### Learning & Development

Upskill operations teams in AI tools, judgement and service quality.

### Legal

Navigate DPDP obligations and structure B2B contracts.

### ESG & Sustainability

Reduce VAC footprint while balancing access, service and cost.

# Turn Sector Intelligence into Enterprise Action

For Business, Finance and Function Directors

Which business priority needs clearer direction or stronger support?

**EXPLORE ROUNDTABLE THEMES**

### 01 Enterprise Resilience

Turn disruption into growth with a financially grounded resilience roadmap.

### 02 Enterprise Transformation

Convert strategy into execution, ownership and measurable change.

### 03 Stakeholder Alignment

Move from functional authority to enterprise-wide influence.

**Let others see the capability those closest to you already recognise.**

Grow in confidence, express yourself with eloquence, and become more recognised for the value you bring.

**REQUEST AN INVITATION**

**Discuss your priority on WhatsApp**

Bring one live business challenge. Let’s explore which roundtable is relevant to your priorities.

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