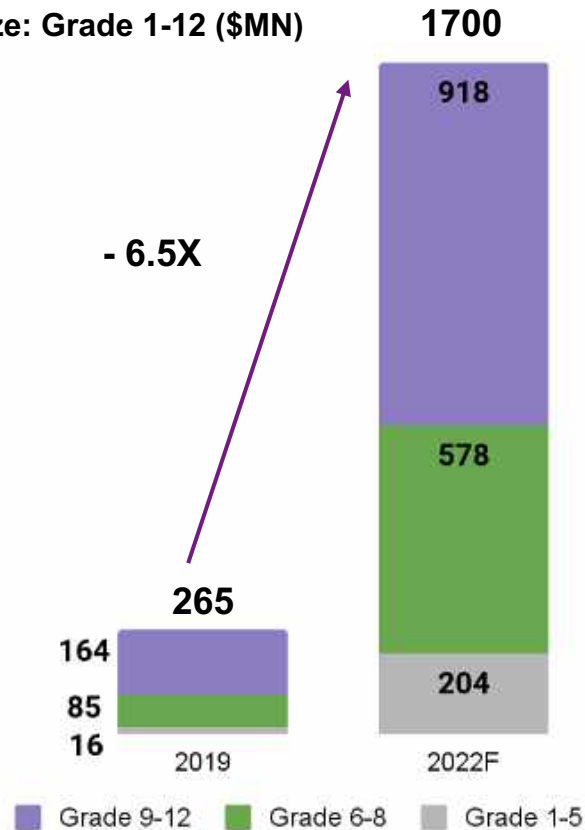**India EdTech Initiative**
Bridging the learning gap

August 2021

While EdTech solutions have scaled, the digital divide continues to grow

With an increase in digitisation, **EdTech solutions for home based learning is growing** and changing the way children in India are learning

EdTech Market size: Grade 1-12 ($MN)

- 6.5X

1700
- 918
- 578
- 204

265
- 164
- 85
- 16

2019   2022F

Grade 9-12   Grade 6-8   Grade 1-5

By 2022, the EdTech market is estimated to grow by 6.5X as compared to 2019

Emergence of EdTech ecosystem for home based learning

1   **4.4x** estimated **growth in EdTech users** by 2022 compared to 2019

2   **50%** increase in time spent online by school students for learning. Primary and secondary students are each spending about **5 hours a day** on average on home learning

3   **40% increase in teacher parent engagement** to motivate students to continue learning online

4   **$2.2 billion** chunky funding was cornered by Indian EdTech players last year, according to a report by IVCA-PGA labs

5   **$16 billion+** of total funding has been collectively raised by 24 EdTech Unicorns around the world and is now collectively valued at $72 billion+

EdTech (a combination of "education" and "technology") refers to hardware and software designed to enhance teacher-led learning in classrooms and improve students' education outcomes.

Source: Oxfam Status Report, ICF Case Study 2018, ASER Report 2021 Wave 1

There is a **growing body of evidence** that demonstrates that EdTech solutions have been able to achieve improved learning outcomes (1/3)

Evidence on Personalised Adaptive EdTech solutions have shown significant improvement in learning outcomes across grades

2-2.4X
faster than control group

Mindspark Delhi RCT (Grades 6-9)

Compared to instructional aids (which are one to many products), **individual-use products have a wider base of evidence showing they could improve learning**

22%
annual growth

QEI-DIB personalised adaptive programme in UP (Grades 1-8)

Interventions that leverage **adaptive technologies** to match instruction to the **learning-level of the user have shown the largest effects**

5-6%
annualised growth

Pan India practice-based learning software (Grades 9-12)

A study conducted by Sattva on EdTech learning applications saw an increase in interest of students in Math from **drastic 25% to 92%** after using the app

6%
annual growth

After school blended learning programme (Grades 6-10)

The technology behind personalised adaptive learning will be implementable, scalable and one that promises **limitless improvement** in the way India learns today.

There is a **growing body of evidence** that demonstrates that EdTech solutions have been able to achieve improved learning outcomes (2/3)

" **ConveGenius** takes our test every week and helps us improve in the sections we performed poorly in. All of us enjoy these classes immensely and look forward to them every week. The WhatsApp classes clear most of my doubts but in case I get stuck, I call my teacher who helps me with it.

- *K. Ramesh, Grade 10, Telangana*

Source for image: gulf news "

" For most of the pandemic, we had to rely on Youtube as we could not meet our teachers. But learning through **ConveGenius** is easier, barely costs us anything and the videos solve most of our doubts. We enjoy these classes because of the animation and its simplicity.

- *Poorva Jambulkar, Grade 7, MH*

"

There is a **growing body of evidence** that demonstrates that EdTech solutions have been able to achieve improved learning outcomes (3/3)

" I could study sitting at home and it helped me a lot. My counsellor helped me a lot in how to use the app, as well as career counselling. I would like to request the **Toppr** team to make this scholarship programme continuous so that all other school students who are good at studies and belong to poor families can get a quality education.
- *Abhinav, Grade 12, Haryana*

Source for image: gulf news "

" My father is a poor driver. He was unable to provide me any private tuition. During this pandemic, it was very hard for me to study and it was in this time that the **Toppr Asha** scholarship came to my rescue. Through its recorded classes, and live sessions, I was able to clear all my concepts.
- *Aditya Kumar Jha, Grade 11, WB*

"

COVID-19 has **widened the existing gap in learning due to the digital divide** and the economically underprivileged are unable to benefit from EdTech solutions

25%
Only 1 in 4 students in India have access to digital learning

65%
Teachers say that **parents are reluctant** in giving access to technology to girls

16%
Students from low income communities had **access to quality Edtech solutions** during the pandemic

24%
Households have **access to internet** as per National Election Study

42%
Girls are allowed access to a mobile phone for **less than an hour** in a day

58%
Students in rural and low-income communities do **not have access to their own study space**

Addressing this challenge requires a **holistic approach** that accounts for multiple barriers that impede access and effectiveness

Lack of awareness amongst parents
Trust deficit amongst parents on the role of EdTech solution and the need to build buy in the initiative for long term sustainability

Lack of access to affordable solutions and hardware
Access to affordable options across proven EdTech solutions and hardware is a challenge beyond India A+

Lack of engagement with students and parents
Current solutions lack positive incentive & nudges to children and their parents thus affecting the overall engagement of students

Lack of shared knowledge and evidence
Limited evidence at scale on effectiveness of EdTech models with low income communities which impedes access to Philanthropic and outcome-based funding

India EdTech Initiative aims to bridge the digital divide at scale

India EdTech Initiative aims to bridge the digital divide by leveraging at home learning time to ensure quality education and improve learning outcomes for all children

Winning Aspiration

Enable digital access to 1 million underprivileged children in India and demonstrate improved learning outcomes by 2025

Increase awareness
Focus on increasing **awareness amongst** parents about EdTech through active on-ground engagement

Improve affordability and access
Enable access for the underprivileged to proven EdTech products **free of cost**, increase hardware access through partnerships

Improve engagement and adoption
Increase student engagement by designing positive incentives on the platform

Improve learning outcomes
Focus on improved learning levels from baseline to endline on the app and third party assessments

Building knowledge for replication & scale
Build on learning from Initial phase to scale impact

India EdTech Initiative will take a phased wise approach to demonstrate outcomes and scale impact

Phase I: Demonstrate outcomes	**Phase II: Scale impact**

Demonstrate improved engagement and learning outcomes for home-based personalised learning solutions in key geographies

Scale execution models through a platform based approach to bridge digital divide in education

August 2021 - March 2022

April 2022 onwards

Reach: 100,000 children

Impact: 1 Million children

For more information on Phase II, click here

India EdTech Initiative will curate EdTech solutions for students from low income communities to ensure continued learning at home beyond school reopening

Aggregate low-income communities

Curate proven EdTech solutions

Ensure active engagement with parent & students

Gather data to ensure growth in learning and engagement

Design positive incentives towards achieving outcomes

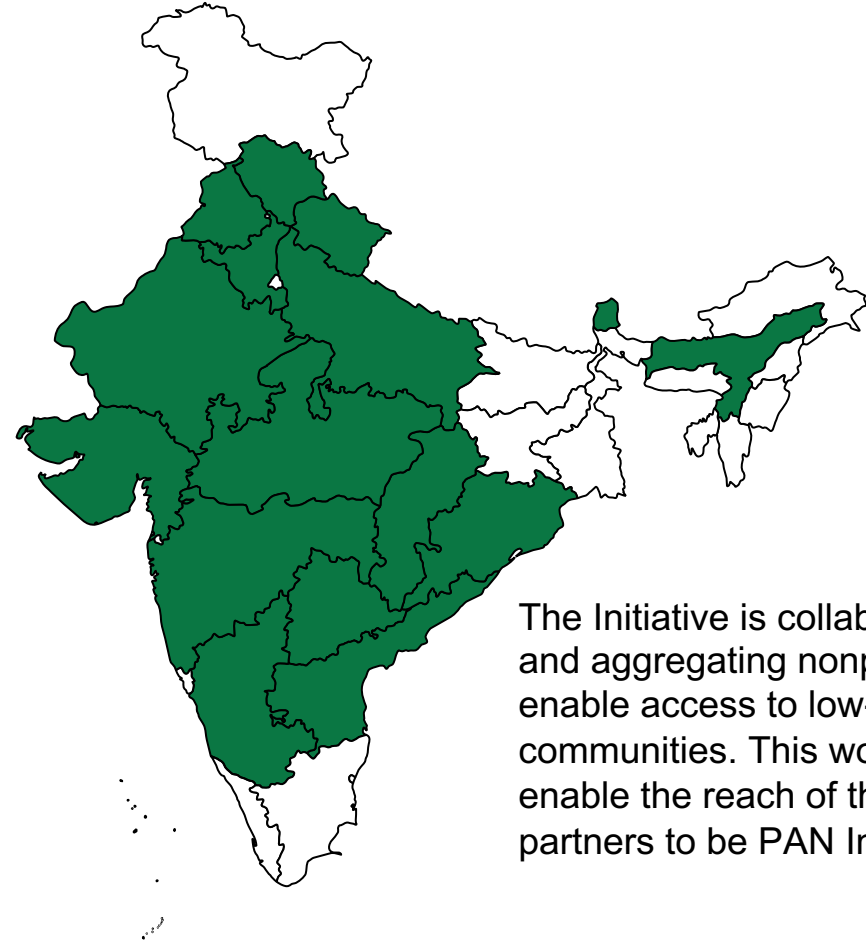**Demonstrate unit economics to balance viability and scalability**

The collective will enable partnerships with **NGOs in low-income communities** with a strong focus on underserved geographies to ensure equitable access

Our target segment

- **Age group:** 9-17 years (Grades III-XII)

- **Family profile:** Monthly income upto ~INR 25,000

- **Key focus Geographies**:
  - Low income communities in urban & rural areas
  - Aspirational districts
  - North East India (districts in Assam)

- **Acquisition strategies:**
  - Government officials in remote districts
  - NGO* partners and community aggregators
  - Existing communities of funders

*EdTech partners are currently in conversations with NGOs and nonprofits such as SOS Children's Village, Teach for India, Educate Girls, Calcutta Rescue, DCPCR, Haqdarshak, Bal Utsav, Ektara, Sitare, Akanksha Foundation, etc.

Current reach of partners

The Initiative is collaborating with and aggregating nonprofits to enable access to low-income communities. This would further enable the reach of the EdTech partners to be PAN India

India EdTech Initiative

For more information on regions and languages covered by partners click here

Proven EdTech partners have been selected through a rigorous process that evaluated their past track record and the suitability to the target population

Partner Shortlisting Criteria

- **Mission alignment:** Aligned with focus on engagement and adoption by underprivileged families

- **Proven Impact:** Demonstrated impact through scale and third-party assessments

- **On-ground engagement:** Commitment to ensure engagement with parents and children to drive adoption

- **Quality of data**: Rich data on reach, engagement and impact collected and shared near real-time

- **Viability at scale:** Appropriate unit economics and co-funding potential to ensure adoption at scale

Potential pipeline: Extramarks, Embibe, Byju's

Confirmed partners

| **India EdTech Initiative**

For more information, click here

EdTech partners will **focus on parent engagement** to build awaress and ensure adoption and engagement of home based learning solutions

Channels for engagement

- **E-PTMs:** Virtual interactions with parents to share student progress reports

- **Community Labs:** Physical spaces for students to use infrastructure in the community

- **Phone-based engagement through:** Calls, WhatsApp, SMS, and IVR nudges

- **Activity-based engagement conducted virtually:** Well being sessions for parents, Counselling for the parents on a case to case basis

Resources for parents

Progress Report
of **Vikas** for the month of **April and May'21**

Academic Progress

	Subject Name	Maths	Physics	Chemistry	Total
Benchmark Test Result	Attempted (Yes or No)	Yes	Yes	Yes	
	Marks	36	22	18	76
	Max. Marks	36	35	36	107
	Marks (%age)	100.00%	62.86%	50.00%	70.95%
	Class Average (%age)	38.93%	36.72%	46.47%	38.33%
	Performance in the Top	0.60%	6.90%	48.10%	
Other Academic Data	No. of Assignment attempted	1	16	18	35
	No. of Doubts asked	0	0	0	0
	Attendance (%age)	0.00%	92.31%	87.18%	89.75%
Previous Exam Name	Benchmark Test	Main test-1	Advanced Test-1	Main Test -2	Advanced Test-2
Percentage (%)	70.95%	58.64%	#N/A	72.00%	63.17%

Sample student progress report to be shared with parents

Data will be collected in the centralised dashboard towards improving effectiveness of the programme & supporting partners to drive decisions on engagement

Reach

- **Number of students** reached (geography wise/ grade wise)
- % students **willing to continue learning** on platform
- % of parents expressing interest to **continue subscription** beyond school reopening

Engagement

- **Stickiness*** on the platform
- % of **students continued engaging** post 6 months of intervention
- **Churn rate** (=number of students who dropped off in a month/total number of students at the beginning) *100)
- % **increase in attendance** of parents who attended e-PTMs
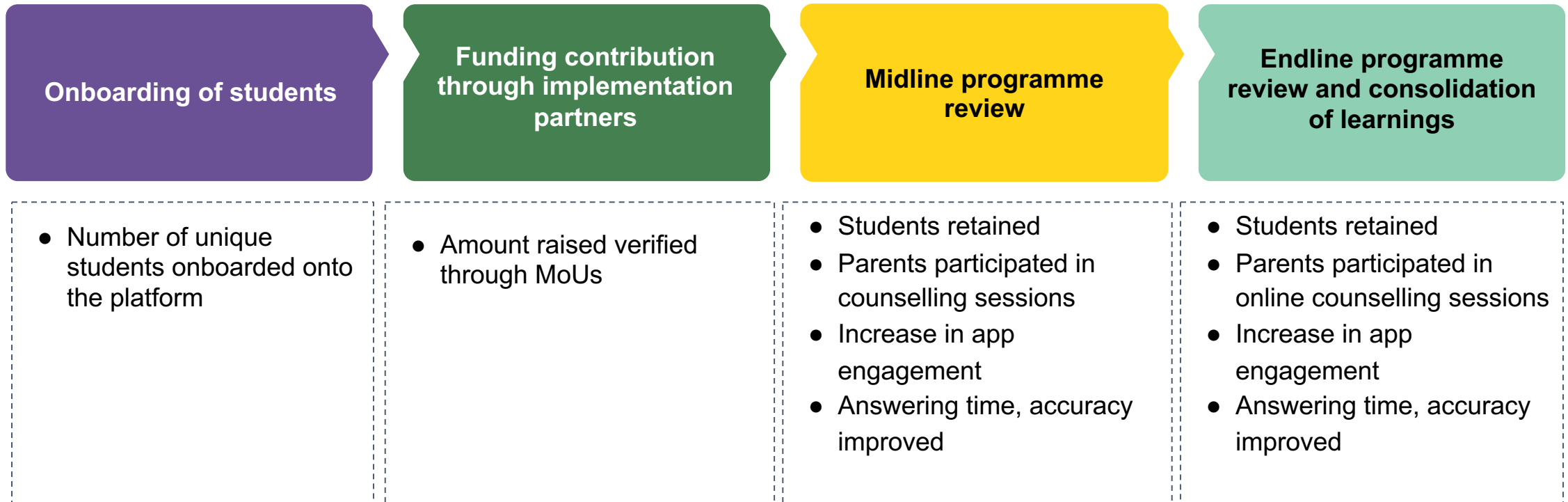
Learning outcomes

- % **growth from baseline to endline** at a student level (On learning app)
- % growth from **baseline to endline assessments** conducted via third party assessments
- **Qualitative feedback** from parents and students on student learning

*Stickiness ratio = Total length of session attended or engaged (in mins) / Total length of session

India EdTech Initiative will ensure **strong focus and accountability for outcomes**

Outcome linked milestones* will be review for disbursement of funds to EdTech partners

Onboarding of students	Funding contribution through implementation partners	Midline programme review	Endline programme review and consolidation of learnings
• Number of unique students onboarded onto the platform	• Amount raised verified through MoUs	• Students retained • Parents participated in counselling sessions • Increase in app engagement • Answering time, accuracy improved	• Students retained • Parents participated in online counselling sessions • Increase in app engagement • Answering time, accuracy improved

Key considerations for disbursement of funds: Co-funding contribution, Cost per child, Proven model as per 3rd party assessment, Parent engagement strategies, Ability to impact learning outcomes for the target segment at scale

*Sattva and Give India will co-govern the outcome linked payment milestones

India EdTech Initiative will leverage unit economics to balance viability and scalability

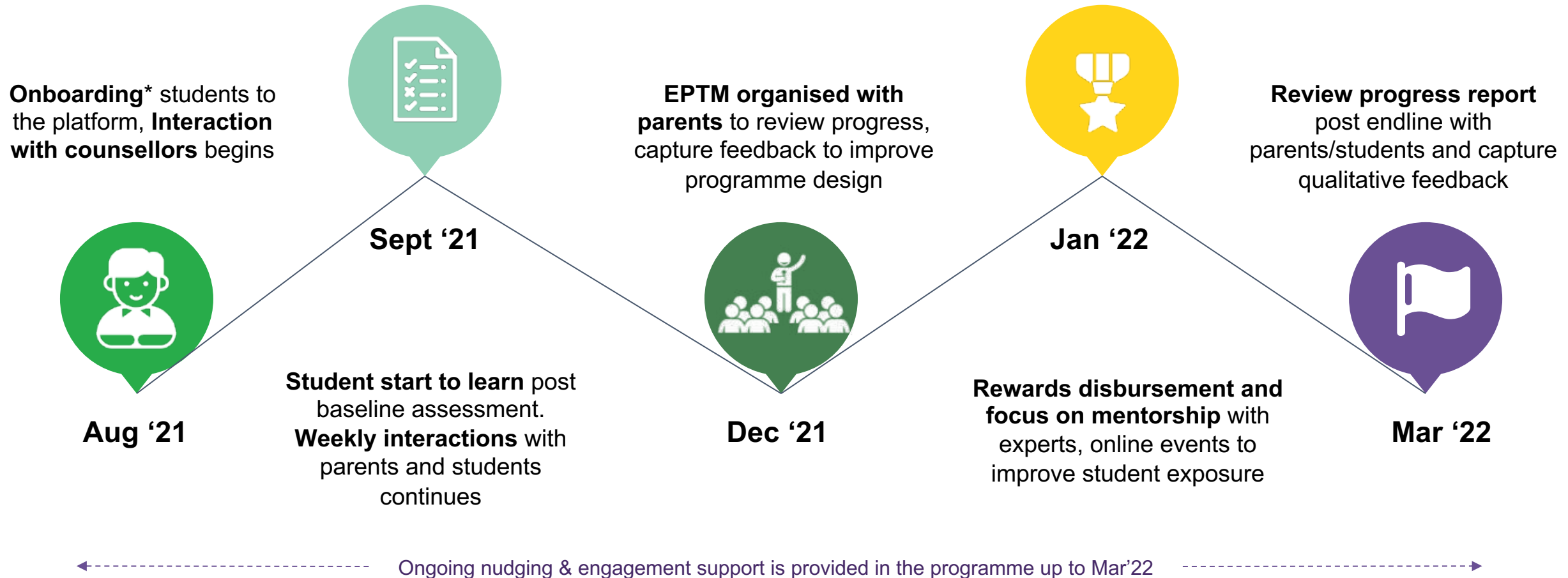**The Initiative aims to provide a highly subsidised subscription to design for viability in Phase I**

₹48,599 — Subscription A cost

₹40,000 — Subscription B cost

₹10,599 — Subscription C cost

₹4,000 — India EdTech Initiative cost

₹6,000 Tuition fee for a year[1]

Market rates*

*Market rates include the cost of various subscriptions available for a 9th grader across service providers in the EdTech ecosystem

Key project cost heads

5% **Student acquisition:** Cost to conduct outreach in low income communities or fee charged by onboarding partner

35% **Provision of learning products:** Cost of subscription for the product to be provided by the EdTech partner

50% **Engagement and nudging:** Costs related to nudging student and parent to build engagement

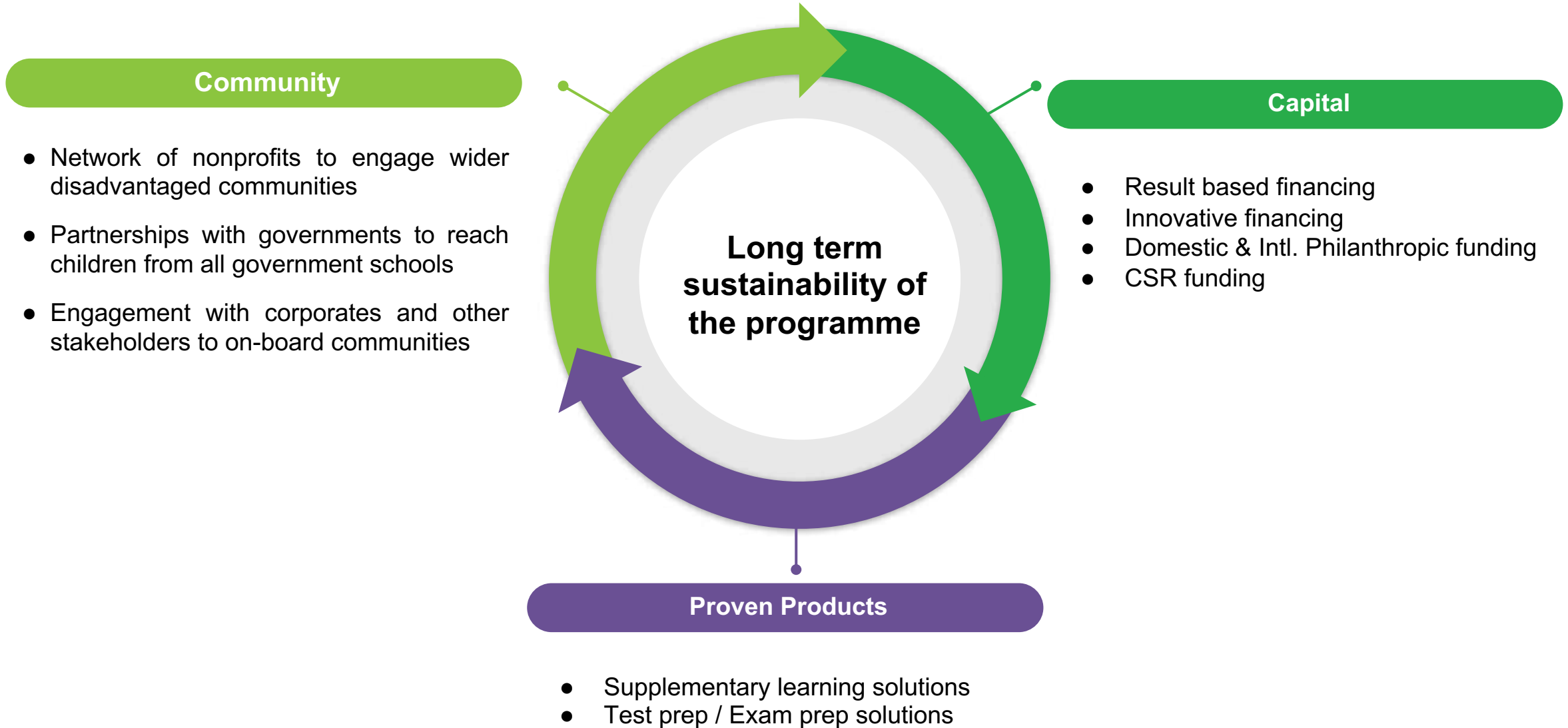**10%** **Miscellaneous:** Costs covering dashboards, reports, delivery and conveyance

[1]*The tuition fee per child for a year is that for all subjects based on the actual costs in low income communities @Rs. 500 for a month*

Learning journey of a student focused on building motivation for consistent engagement on the platform

Onboarding* students to the platform, **Interaction with counsellors** begins

EPTM organised with parents to review progress, capture feedback to improve programme design

Review progress report post endline with parents/students and capture qualitative feedback

Sept '21

Jan '22

Aug '21

Student start to learn post baseline assessment. **Weekly interactions** with parents and students continues

Dec '21

Rewards disbursement and focus on mentorship with experts, online events to improve student exposure

Mar '22

Ongoing nudging & engagement support is provided in the programme up to Mar'22

Onboarding refers to an unique student registering on the platform and starting their learning journey

Beyond Phase I, the initiative will scale its reach to ensure effective EdTech adoption

India EdTech Initiative aims to build an ecosystem of enabling capabilities that would continue engagement on the platform beyond school reopening

Community

- Network of nonprofits to engage wider disadvantaged communities
- Partnerships with governments to reach children from all government schools
- Engagement with corporates and other stakeholders to on-board communities

Capital

- Result based financing
- Innovative financing
- Domestic & Intl. Philanthropic funding
- CSR funding

Long term sustainability of the programme

Proven Products

- Supplementary learning solutions
- Test prep / Exam prep solutions

India EdTech Initiative will **aggregate communities across stakeholders** and build active engagement to ensure adoption of solutions

Aggregation of communities

Engagement with corporates and other stakeholders to on-board communities

Aggregate network of nonprofits to engage wider disadvantaged communities

Partnerships with government to reach children from all government schools

At scale engagement

Trusted recommendations on proven products that are relevant to parents

Subsidised pricing for solutions by reducing cost of customer acquisition

Standardised nudges that can be 'platformised' across solutions

Rich data across parents and solutions on engagement and adoption

India EdTech initiative will be **designed to build a strong body of evidence** towards outcome based deployments and innovative financing

While 30% of **CSR funding** is focused on education, less than **6% funding is focused on Ed-Tech solutions**, with even **lesser focus on outcomes**

Aggregate **CSR Funding** towards **outcome-based deployments of EdTech in specific geographies** leveraging proven products & outcome reporting
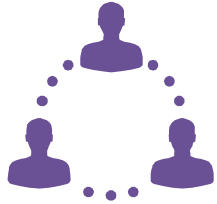
Lack of robust data and evidence impeding result-based financing models in EdTech to enable larger adoption

Build a strong body of evidence enabling baselining of outcomes and **identification of proven products to enable Result-based financing**

Public and Philanthropic Investments in Hardware provisioning to families ineffective due to lack of proven solutions to enable learning

Establish synergies with public procurement of devices with philanthropic funding for solutions and ongoing engagement with parents

India EdTech initiative will **curate the proven solution models** of engagement and scale towards impact

Enable customer acquisition through aggregated communities

Validate parents' willingness to pay and price points for solutions

Provide deep customer insight through active engagement

Facilitate public partnerships for solution deployment

Enable access to Impact investment and result-based financing

Enable partnerships with organisations for increasing hardware access

India EdTech Initiative is a multi stakeholder initiative and will collaborate with diverse stakeholders to drive outcomes

India EdTech Initiative will drive collective action by bringing together key stakeholders

Collective Funders

- Provision of capital for design and implementation
- Facilitate partnerships*

Programme design and management

- Design programme for Phase 1
- Onboard and manage centralised partnerships
- Create and track learning and monitoring systems
- Synthesise, disseminate learnings

Existing education based nonprofit grantees or Saajha/Sarathi

- Disbursement, management of funds
- Support in reporting of programme level milestones
- Enable access to beneficiaries
- Generate parent awareness on learning continuity and home based engagement

Implementation partners

- Onboard and engage with students to the platform
- Engage with parents to drive adoption
- Consolidate, share progress reports and drive implementation

Education based nonprofits

- Onboard nonprofits both grassroot and scale that can be leveraged to onboard students across geographies
- Potential nonprofits:

Lending partners for hardware

- EdTech partners will initiate campaigns to provide loans and refurbished devices
- Enable partnerships with lending partners to provide loans to buy devices for learning

Partnerships will be leveraged for hardware support

We invite you to **join the India EdTech Initiative** and enable continued learning for students across the country in any of the following proposed way

Join us as anchor funders to ensure strategic direction and holistic programme engagement

Provide strategic guidance on the program design and support in forging partnerships

Support across India in deployment & adoption of EdTech solutions, irrespective of geography

Intervene in any geography/community on-boarded by the edtech partner and nonprofit

Support deployment & adoption of EdTech solutions in **specific communities/target segment of choice**

Support by providing access to existing communities you are engaging with

Encourage outcome focus by supporting outcome-linked payments to partners
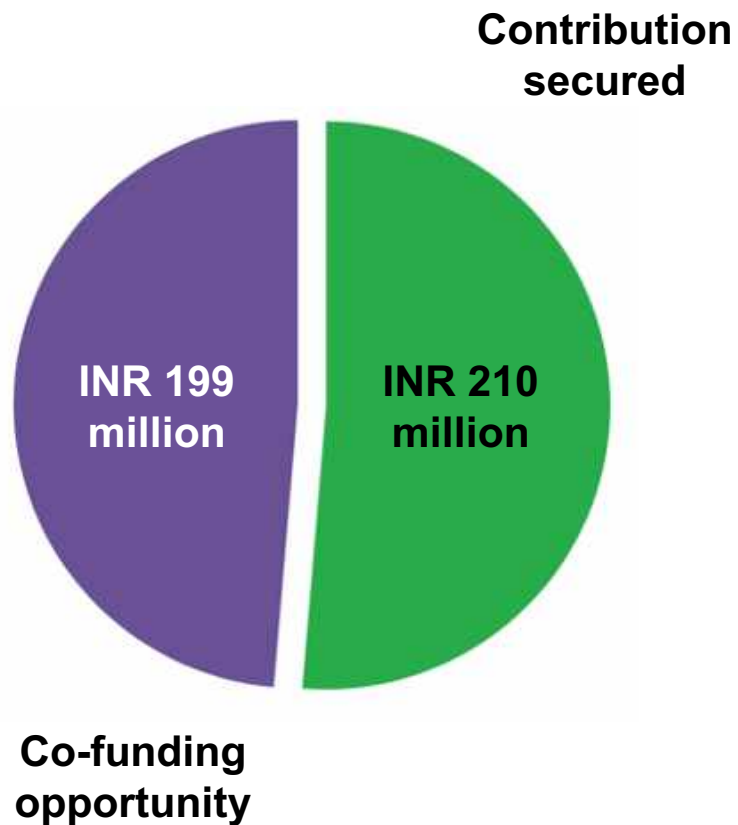
Fund in incentive based payment & drive collective towards outcomes

Advocate for **gender lens** by joining as girl child focused funders

Support payment for gender based low income target segments

With **catalytic funding from our anchor partner MSDF**, we wish to collectively amplify impact by engaging the ecosystem and expanding our pool of partners

Contribution secured

INR 199 million

INR 210 million

Co-funding opportunity

	INR million	USD million	GBP million
Total budget of the programme	**409**	**5.5**	**4.0**
Project Costs	349	4.7	3.4
Assessments costs	10	0.1	0.1
Programme management costs	32	0.4	0.3
Fund management costs	19	0.3	0.2

Note: Tentative budget currently chalked out for 1 Lakh children
USD 1 = INR 74.5
GBP 1 = INR 102.5

Thank you

Rathish Balakrishnan
Managing Partner and Co-founder, Sattva
rathish@sattva.co.in

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Annexure

In phase II of the programme, India EdTech Initiative will forge partnerships to expand its reach to 1 million students

Government

Partnerships with state governments can be leveraged as pilot in one of the states or a multi-state initiative towards scale-up

Potential and Reach
(number of students enrolled in grades 3 to 12)

Haryana	Delhi	Himachal Pradesh
1.3M	**4.1M**	**1.3M**

NGO Partners

Collaborations with large scale nonprofits will be leveraged to unlock access to 50k to 1L children per organisation

Potential and Reach
(number of students the organisation impacted)

KAIVALYA EDUCATION FOUNDATION	educate girls	Pratham	STIR education
5M	**0.9M**	**4.3M**	**6M**

Corporate Communities

Through our partnerships with Corporates, the Initiative will enable access to CSR communities (especially corporates in manufacturing) adjacent to plants and factories

BAJAJ   Ambuja Cement   Castrol   ACC   Cipla

Other Partnerships

The Initiative will work with organisations such as Varthana and Lead to unlock the potential of collaboration with school chains to create greater impact

varthana   LEAD   Kaizenvest

350+ schools	**0.8M+** students

Proven EdTech partners with past track record and the suitability to the target population will join the collective to amplify the impact

	Geographies	Reach	Product fitment	Outcomes
ConveGenius Nudging Education	CG works in 16 states of India	5.4 lakh students from aspirational districts	Available in 10 languages	Remedial learners in Nanhikali (Grades 6-10) have demonstrated the highest growth (10%) followed by intermediate learners at 6%.
e1 MINDSPARK	2 states of India, 13 districts	5 lakh students from underprivileged communities	Available in 9 languages	Mindspark Delhi RCT showed 2-2.4 times faster growth compared to control group for grades 6-9
toppr	Toppr Asha was implemented across low income communities 8+ states in North India	5000 students were provided scholarships	Product is available in English	In Math, 46% grade 9 students reached grade level
Vedantu	Help India Learn initiative will be implemented PAN India	12000 students from underprivileged and remote geographies	2 languages	-

India EdTech Initiative's partners are present across states in India, with products available in multiple languages

Geographies for the Initiative

Partner	Geography
ConveGenius	Assam, Andhra Pradesh, Gujarat, Himachal Pradesh, Madhya Pradesh, Maharashtra, Orissa, Punjab, Rajasthan, Sikkim, Telangana, Uttar Pradesh
EI Mindspark	Maharashtra, Rajasthan, Gujarat, Himachal Pradesh, Uttar Pradesh, Madhya Pradesh, Uttarakhand, Telangana, Chattisgarh
Toppr	North and north east India, Gujarat, Karnataka, Maharashtra
Vedantu	PAN India

The Initiative's EdTech partners have products available in 11 languages to cater to students PAN India

Language	CG	EI	Toppr	Vedantu
English	✔	✔	✔	✔
Hindi	✔	✔		✔
Punjabi	✔	✔		
Marathi	✔	✔		
Gujarati	✔	✔		
Bengali	✔			
Telugu	✔	✔		
Urdu	✔	✔		
Tamil	✔	✔		
Odia	✔			
Kannada		✔		

India EdTech Initiative would maximise impact from the get-go with key stakeholders

Michael and Susan Dell Foundation (MSDF) is a global philanthropic foundation dedicated to transforming the lives of children living in urban poverty through improving their education, health and family economic stability. MSDF's work includes supporting underserved students to improve their academic performance and get access to quality education, through incubation and growth of innovative service providers

GiveIndia exists to alleviate poverty by enabling the world to give. Established in 2000, it is the largest and the most trusted giving platform in India today. GiveIndia partners with corporations, foundations and philanthropists to consult and design long term impactful programmes, especially 'giving collectives' and 'collective impact' models, project manage grants and provide M&E and reporting services

Sattva is a social impact consulting firm focused on developing scalable solutions for corporates, foundations, social and multilateral organisations to facilitate achievement of their social impact goals. Sattva brings extensive experience of working in the education sector, including conducting diagnostic and landscape studies, demonstrating impact and efficacy of EdTech solutions, and running large scale programmes

Assessment Partner

TBD