TECHNOLOGY TRENDS IN EDUCATION
A Big Transformation

Computer to Mobiles

Books to e-books

“Sage on stage to Mentor on side”
The target of the mission is to make 10 lakh people digitally literate by 2015-end
DIGITAL INDIA PROJECT

- Government should partner local communities in ‘Digital India’.
- Google ready to help in Digital India project.
- Microsoft keen to partner Digital India, Make in India programme.
- Investments in broadband need to be encouraged and facilitated in India.
- E-commerce will pave way for Digital India.
- Digital India is about empowering its citizens.
- Telecom Commission defers 8 percent license fee on Internet service providers.
- Private telecom can play big role in Digital India retail rollout.
- BSNL selects key areas as it prepares for Digital India.
With approximately 31 per cent of India’s population between the age group of 0-14 years providing a great opportunity

The schooling segment in India is estimated to reach USD144 billion by 2020 from USD44 billion in 2011

With 20 million students and approximately 36,000 institutions, India’s higher education segment is the largest in the world

Higher education sector in India is expected to increase to USD37.8 billion by 2020 from USD10.1 billion in 2010

Government target of Gross Enrolment ratio (GER) of 30 per cent for higher education by 2020 to drive investments

In the 12th Five Year Plan, the Government plans to provide a budgetary support to the education sector of USD 74.4 billion against USD 37.3 billion in the 11th Five Year Plan
**Advantage India**

**2011**
- **Robust demand**
  - Huge demand supply gap with an additional requirement of 200,000 schools, 35,000 colleges, 700 universities and 40 million seats in the vocational training centers.

**2020E**
- **Schooling segment in India expected to be USD144 billion**

**Competitive advantage**
- Largest population in the world of about ~500 million in the age bracket 5 to 24 years.
- India, having a literacy rate of only 74 per cent compared to the world average of 84 per cent, presents an opportunity for private players to explore the untapped market.

**Increasing investments**
- Increasing foreign direct investment (FDI) in the sector from USD0.04 billion in FY 11 to USD0.26 billion in FY 14.
- An estimated investment of USD200 billion needed by Government to achieve its target of 30 per cent GER for the higher education segment by 2020.

**Policy support**
- 100 per cent FDI (automatic route) is allowed in the Indian education sector.
- To liberalize education, major initiatives like the National Accreditation Regulatory Authority for Higher Educational Institutions Bill, 2010 and the Foreign Educational Institutions (Regulations of Entry and Operations) Bill, 2010 taken.
In 1964, the Kothari Commission was appointed to make a detailed survey of all the education branches in India and advise government on policies for the development of education at all stages and in all its aspects.

In 1992, the National Policy on Education-1986 was revised.

In 1995 the National Programme of Nutritional Support to Primary Education (NP-NPSE) was launched as a sponsored scheme by the Centre.

In 1995, National Council of Rural Institutes (NCRI), an autonomous body was established for the promotion of rural higher education.

RMSA was launched in March 2009 with the objective to enhance access to secondary education.

In 2009 Saakshar Bharat, a centrally sponsored scheme was launched with focus on women and other disadvantaged groups in rural areas of low literacy.

The RTE, became operative in 2010 according to which every child has a right to elementary education.

Higher Education and Research Bill 2011 was introduced in the Rajya Sabha in 2011.

In 2012 the amendment of the Indian Institute of Technology Act, 1961 took place which envisages inclusion of eight new IITs.

In 2013, Indian Institutes of Information Technology Bill, 2013 has been formulated and introduced in the Lok Sabha to ensure uniformity and autonomy in governance in respect of all the IITs.
EDUCATION LANDSCAPE IN INDIA

Indian education system

Public sector
- Schools
  - Central Govt. funded institutions
  - State Govt. funded institutions
  - Higher education institutions

Private sector
- Formal setup
  - Schools
  - Higher education institutions
- Non formal setup
  - Pre-schools
  - Coaching classes
  - Multimedia schools
  - Vocational training centers
  - Education material suppliers
OVERVIEW – PUBLIC SECTOR

* With the Government of India allocating USD 13.2 billion budget for the education sector in FY14, Indian education sector presents a huge opportunity for the sector
  * Since FY 2007-08, allocation for education has increased over 2-fold*
* Elementary education accounts for bulk of the expenditure. In FY 2013-14, 52 per cent of the total education budget has been allocated to elementary education

**Government of India spending by education segment (USD million)**

<table>
<thead>
<tr>
<th>Education Segment</th>
<th>FY 08</th>
<th>FY 14</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elementary</td>
<td>6,847</td>
<td>5,043</td>
</tr>
<tr>
<td>Secondary</td>
<td>653</td>
<td>1,781</td>
</tr>
<tr>
<td>Higher education</td>
<td>963</td>
<td>2,307</td>
</tr>
<tr>
<td>Technical Education</td>
<td>527</td>
<td>1,687</td>
</tr>
<tr>
<td>Others</td>
<td>161</td>
<td>558</td>
</tr>
</tbody>
</table>

OVERVIEW – PRIVATE SECTOR

* The private education sector which was valued at USD50 billion in 2008 is estimated to reach USD115 billion by 2015
* The emergence of the un-organised private education sector in India has opened a door of opportunities for many companies
* With increased corporate investments in the sector, the share of private schools in the total number of schools have increased over the past few years
SCHOOLING & VOCATIONAL TRAINING INFRASTRUCTURE IN INDIA

Schools: ~1.3mn
- Govt.: ~1.0mn
- Private: ~0.3mn
- No of students: ~237mn
- Annual intake: ~18mn
- Additional requirement 200,000 schools

Vocational training centers: 18,000
- Politechnic institutions: ~2,250
- ITC: 7,200
- No of students: ~4.5mn
- Annual intake: ~1.8mn
- Additional requirement 40mn seats
### Notable Trends in India's Education Sector - Preschools

- **Entry by big corporates**
  - Owing to preschools being seen as an attractive investment opportunity, a lot of corporates are setting up their own preschools chains for example Camlin Group setting up Alpha Kids

- **Upgrading to K 12**
  - Preschool chains like kidzee and Eurokids are upgrading to K-12 segment in order to retain a majority of their preschool population

- **Partnership with builders**
  - Increasing preschools are partnering with builders to obtain flexibility against high lease rentals for example joint venture to set up a preschool between AEZ group and Mother's Pride

### Notable Trends in India's Education Sector - K-12

- **Private schools adopting franchise models**
  - Various operating models like a mix of franchisee and owned-schools are being used by the private players to ensure their economic viability

- **Emergence of international school segment**
  - With increasing awareness, private Indian players are collaborating with international brands to provide international standard quality education

- **Increasing use of technology**
  - Schools are investing in information and multimedia education technologies to provide better education to students
NOTABLE TRENDS IN INDIA'S EDUCATION SECTOR - HIGHER EDUCATION

International collaborations

- In order to meet the need of today's demanding students who seek international exposure, many Indian universities and colleges have entered into joint venture agreements with international universities to provide world class education.

Multi campus model gaining popularity

- Many private institutions are adopting multi city campus model to scale up their operations and expand in the untapped market of tier 2 and tier 3 cities.

Specialised degrees gaining popularity

- With more and more students opting for industry focused qualifications, the demand for specialised degrees is picking up.
- Most of the universities are offering MBA / Technical degrees with focus on specific sectors.

NOTABLE TRENDS IN INDIA'S EDUCATION SECTOR - VOCATIONAL TRAINING

Increasing interest from PE/VC firms

- Private equity players have become bullish on the fast growing education sector including vocational and supplementary training. Between 2010-13, there were 47 Private Equity deals worth USD 586.1 million. For example, Kaizen Management Advisors invested in Ace Creative Learning Pvt Ltd and WizIQ raised money from Kaizen and Bertelsmann.

Online channel gaining momentum

- With rising internet penetration in India, vocational training companies are selecting the online channel to offer courses and increase their national reach.

Corporate partnerships

- In a recent trend, vocational training companies have entered into agreements with corporate houses to train their existing employees with the required skill sets.
- Also through corporate partnerships, vocational training companies are training college passouts with both soft and hard skills required by their corporate partners.
Increasing disposable income and willingness of people to spend on education is a key driver for the Indian education industry.

Education in India

- Formal education
  - K-12
    - Increasing awareness and sub standard government school structure in India is driving private schools enrollments
  - Higher education
    - High demand of qualified employees from the growing service sector

- Informal education
  - Coaching institutes
    - Higher competition for professional courses
  - Pre-schools
    - Franchisee models and increasing awareness in tier 2 and 3 cities is set to drive the sector
  - Vocational education
    - Increasing demand for skilled labour
    - Low employability levels
This change is already underway in India
Tablets resonating even in “affordable” private schools
India International School delivers high-quality learning through the effective integration of technology

India International School, based in Bangalore, India, is in its endeavor to provide holistic value-based education to their students. They integrated technology into their learning system and transformed their education delivery system, ultimately resulting in a positive impact on their overall education system.

Challenges
- Fostering better understanding of various concepts
- Shifting from a traditional model of direct instruction to student-centric learning
- Delivering global learning for a complete learning experience

Solutions
- India International School effectively integrated technology into their education system
- Empowering teachers with technology to deliver better learning experiences
- Encouraging students to use PCs/laptops in the classroom
- Enabled independent, skill-based, interactive, and collaborative learning for students
- Increased the quality of teaching through the effective utilization of technology by teachers
- Succeeded in providing a high-quality education for students

Indus International School, Bangalore, adopts 1:1 learning methodology for equipping students with 21st century skills

Indus International School, Bangalore, and Indus International Community School, true to their commitment to providing education beyond the classroom, are imparting 21st century skills to their students through Intel's 1:1 learning methodology and are enabling lifelong learning — helping their students become actively engaged citizens of the world.

Challenges
- Creating an educational system that prepares students for success in the 21st century
- Shifting from a top-down and hierarchical learning to a more inclusive student-centric learning system
- Empowering teachers to integrate technology into the classroom

Solutions
- Intel 1:1 Indus International School collaboration to support new ideas and innovative programs
- Specific initiatives to make PCs and the Internet more accessible and to make them integral to the teaching system
- Extensive teacher professional development on how to integrate technology into the classroom
- Indus International School implemented 1:1 e-learning for all students enabling student-centered lifelong learning
- Teachers are integrating technology and 21st century skills when delivering lessons
- Students are developing skills in critical thinking, problem solving, and collaboration
Millennium @ EDU Sole Lab

The Management, Staff and Students of
S J T Surana Jain Vidyalaya & Junior College, Chennai
GT Aloha Vidhya Mandir, Chennai
Takeshila Group of Schools, Ambar
Vidhyasagar Global School, Chengalpet

jointly invite you to the grand inauguration of

Sole Lab
(SELF-ORGANIZED LEARNING ENVIRONMENT)

Dr. Sugata Mitra
Professor of Educational Technology, New Castle University, UK
Recipient of prestigious JOS and Honorary of Savage Schools
will inaugurate and deliver keynote address in the presence of
Mr. Mario Franco
Chairman and Founder, Millennium@EDU - Sustainable Education, Portugal

ICDL will be signed as partners in Global Education

Mr. Pratik Mehta
Director and Country Head - Education, Microsoft
will confer the title "Microsoft Innovation School" on the organizers.

on FRIDAY, 25th JULY 2014 at 11.30 a.m.

at THE MUSIC ACADEMY, P.T. Road, Chennai - 600 001

We solicit your enthusiastic response to boost our educational endeavors.

ANAND SINGHI
SECRETARY GENERAL
MILLENIUM@EDU SUSTAINABLE EDUCATION

BHARATI TOSHI
SECRETARY ADMINISTRATION
GT ALOHA VIDHYA MANDIR

VIKAS SURANA
SECRETARY GENERAL
VIDHYASAGAR GLOBAL SCHOOL

ANAND P. SURANA
SECRETARY ADMINISTRATION
VISTASHI GLOBAL SCHOOL

CONNOISSEUR ELECTRONICS PVT. LTD.
For a holistic digital learning experience in classrooms

Sole Labs will enable students to learn in collaborative work groups with close guidance of teachers through a digital platform.

While the students would work out problems on the devices, with this programme, the teachers would be able to assist the students instantly. The model could also help teachers analyse student performance at the spot, said Mehta.

As this was a relatively new technology, Microsoft would train the teachers for using the software through self-learning applications, Mehta added.

Currently, four schools in Tamil Nadu and one in Puducherry are the only Indian schools amongst 45,000 others in the world which have been conferred with the MS Innovative School Award. These schools would have a direct link with Microsoft, which would help in the necessary information transfer.

Connoisseur Electronics Pvt. Ltd.
**Millennium @ EDU Projects:**

**MILLENNIUM @ EDU classroom setup done in the below list of Schools:**

1. Kakrola School-Delhi.
2. Society for All Round Development (SARD) - Delhi.
5. SJT Surana Jain School-Chennai.
6. Chennai City Corporation School-Chennai.
7. Takshila School-Vellore.
Millennium classroom setup in Karkola School-Delhi
Millennium classroom setup in Karkola School-Delhi
Millennium classroom setup in SARD-Delhi
Millennium classroom setup in mountain view school-Chikmagalur
Millennium @ EDU Projects:

Millennium @ EDU Projects completed:
2. SJT Surana Jain School-Chennai.
3. Chennai City Corporation School-Chennai.
4. Takshila School-Vellore.

MILLENIUM @ EDU PROJECTS UNDER EXECUTION:
Kerala literacy: Kerala is the most literate state in India, with 93.91% literacy. Kerala has the highest literacy rate among the states of India, followed by the state of Mizoram. Kerala topped the Education Development Index (EDI) among 21 major states in India in year 2006–2007. More than 94% of the rural population has access to primary school within 1 km, while 98% of population benefits one school within a distance of 2 km. An upper primary school within a distance of 3 km is available for more than 96% of the people, whose 98% benefit the facility for secondary education within 8 km. The access for rural students to higher educational institutions in cities is facilitated by widely subsidized transport fares. Kerala’s educational system has been developed by institutions owned or aided by the government. In the educational system prevailed in the state, schooling is for 10 years which is subdivided into lower primary, upper primary and high school. After 10 years of secondary schooling, students typically enroll in Higher Secondary Schooling in one of the three major streams—liberal arts, commerce or science.
Millennium @ EDU & Connoiseur is executing the project in Kerala State Government under honorable Mr. P K Adbu Rabb the Minister of Education Government of Kerala who is supporting the pilot Millennium@ EDU Digital Classroom set up in the below mentioned Government Schools.

FUTURE MILLENNIUM @ EDU UNDER CONSIDERATION IN KARNATAKA:

- Millennium, Pasco and Connoiseur working with Government of Karnataka Principal Secretary Mr. Bharat Lal Meena - Higher Education, Govt. of Karnataka.
FUTURE MILLENNIUM @ EDU UNDER CONSIDERATION IN MAHARASHTRA:

- Millennium and Connoiseur is already positioned Millennium @ EDU in Government of Maharashtra and meetings are scheduled.
- Setting up of Millennium @ Edu Digital Classroom setup @ Nagesh Karajagi Orchid School, Solapur in Nov 2015.
Work in progress for several Millennium @ Edu Digital Classroom deployment.

Thank you!!!