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*The Summer Issue*



## EDTECH IN INDIA: A LEARNING CURVE

The EdTech sector in India has been climbing the charts since the pandemic, but with the focus shifting back to offline learning, it has seen a shake-up of sorts. So where is it headed? We speak to industry experts who share their insights.

By BINDU GOPAL RAO

ACCORDING TO THE RECENT 'INDIA E-Learning Market: Industry Trends, Share, Size, Growth, Opportunity and Forecast 2023-2028,' report by International Market Analysis Research and Consulting Group (IMARC Group), India's EdTech industry is on a roll! It's growing at a compounded annual growth rate (CAGR) of 13.7 per cent and is estimated to reach US\$14.1 billion by 2028. Impressive numbers, for sure. However, while the future may be bright, the current scenario is not without its challenges.

It's common knowledge that the pandemic had disrupted traditional learning and forced a shift towards online education. Now, with life returning to the new normal in India, which includes the reopening of schools, the K-12 segment is returning to its earlier offline mode of teaching. That being said, tuition and test prep centres are

still looking at a hybrid model of learning delivery that involves a mix of online and offline classes. While this definitely helps the EdTech sector, it's in the realm of higher education and upskilling of working professionals that online learning really finds its thriving force.

The acceleration of digitalisation, driven by the COVID-19 pandemic, led to significant changes in job dynamics for employers and employees. Moreover, workers' expectations have seen a great shift. With job volatility and inflation, securing a well-paying, stable job that allows long-term career advancement has become critical. As a result, many working professionals are seeking to reskill and upskill themselves to stay relevant in the job market. As a result, executive online learning has emerged as an immensely popular option. The flexibility and convenience it offers

makes it easier for professionals to apply themselves to studying further, enabling them to upskill themselves without compromising their work or family commitments.

The democratisation of education is yet another factor contributing to the growth of online learning, with top universities and industry experts offering high-quality courses at costs that are much lower than those expected in traditional education.

### DOING THE MATH

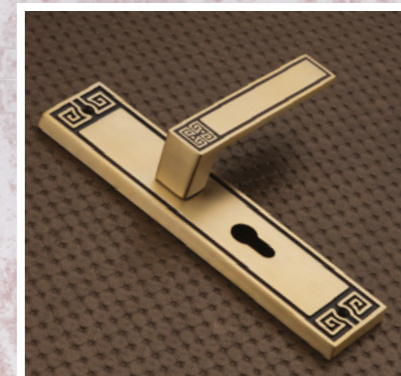
With over 1.5 million schools and more than 300 million students enrolled in them, India is one of the largest education systems in the world. According to an industry estimate, India currently is home to more than 4,000 EdTech start-ups. However, recent reports indicate at least 25 funded start-ups have shut down and the industry has seen over 7,000 layoffs. The sector

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A young girl enjoys an online lesson.



Smart classrooms are shaping the future in India.

technology in school education. In recent years, the government has launched several digital education initiatives such as 'Swayam', a platform offering free online courses from top universities, and the 'Diksha' app, giving teachers access to digital content and resources. Many believe that partnering with the government on these initiatives can also give a fillip to EdTech players. Rajesh Panda, Founder and MD, Corporate Gurukul, a learning

and development firm, says, "The measures announced by the Finance Ministry, such as creating three centres of excellence for Artificial Intelligence, 100 laboratories for the development of 5G apps, and the establishment of a national digital library will also help the development of the EdTech sector in India."

The key to success, however, lies in rebuilding trust, an issue that continues to plague the industry, and is further aggravated by a lack of effective regulation and legislation.

**SHIFTING GEARS**

That's not to say that the industry is relying solely on the government to help them survive and grow. The EdTech sector has been taking its own proactive steps and is looking to make changes to remain relevant

"PAL is a great innovation in EdTech."  
**Puneet Goyal, Co-founder, iDream Education**

and sustainable in the long run. One such great initiative is Personalised Adaptive Learning (PAL), an innovative solution in EdTech that personalises the learning path of every student based on their current learning levels. Every chapter on PAL offers a diagnostic test to the students, identifying their learning level and suggesting supplementary learning content and practice to create a unique learning path for every student. PAL also facilitates access to learning resources of junior classes to cover the historical learning gaps of previous years, helping bring them to grade optimum learning levels. "PAL is a great innovation in EdTech," says Puneet Goyal, Co-founder of iDream Education, which works to facilitate universal access to learning and growth. "It empowers our students to bridge their learning gaps in a personalised and non-judgemental manner. It is also a great boon for our government school students who suffer from the previous year's learning gaps, which are hard to cover up otherwise and become a major obstacle in the learning and growth of last mile learners."

Other crucial changes that are making inroads are the tailor-made solutions, designed to cater to individual needs and preferences, being offered by EdTech companies. Students are now more informed while selecting what they want to

TOP IMAGE: Ground Picture / Shutterstock; BOTTOM IMAGE: iDream Education

**BALD TO BOLD BY  
 "Advanced FUE Hair Transplant"**

**H**aving a vast experience of 10 years with over 4000 hair restoration surgeries and exceptional and consistent results to her credit, Dr Shalini Malhotra, MBBS, DNB (Dermatology), MNAMS, DIPLOMATE of ABHRS (USA), makes sure that you have a crowning glory on your head.

"I perform every hair restoration surgery myself and do not believe in leaving the patient in the hands of technicians. I'm trained in performing an extremely refined procedure for hair transplant called The Advanced FUE technique," says she. She uses extremely fine and technologically advanced instruments called implanters. These are single-use and ensure safety during the procedure as well as quality in results. There is minimal handling of grafts resulting in almost 99 per cent survival of hair follicles.



**Dr Shalini Malhotra is one of the few master surgeons who performs the advanced FUE (Follicular Unit Excision) technique of hair transplant using implanters that's safe, painless, without any visible scarring & gives natural results.**

**What is hair transplantation? How safe is it?**  
 Hair transplantation is a simple surgery done under local anaesthesia. It involves removing hair follicles from the back portion of the scalp called the 'donor site' and transplanting them to a bald or balding area known as the 'recipient site'. It is one of the safest procedure in the medical field provided it's done by a qualified and experienced doctor in a sterilised OT set up.

**Who is qualified for hair transplantation?**

A hair transplant doctor should have degrees such as MD or DNB in Dermatology or Plastic Surgery. A board certification can be of value. The American Board of Hair Restoration Surgery (ABHRS) is the only recognised organization by the International Society of Hair Restoration Surgery (ISHRS) that offers certification for doctors specialising in hair transplantation. Apart from this, a qualified hair transplant doctor is someone who has extensive training in hair transplant surgery, understands the reasons for hair loss well and has many satisfied clients. Looking at one's before and after transplantation results can be a testament to one's skills. Finally, ethics is the key. Too many clinics have aggressive salesmen to push you into a procedure that the surgeon might otherwise think is dangerous or inappropriate. Ethical judgment on when not to operate is very important.

**You are certified by the American Board of Hair Restoration Surgery (ABHRS). What does it actually mean for patients?**

With a post-graduate degree in Dermatology, I underwent rigorous training in hair transplantation from the DHI (Direct Hair Implant) Academy in Greece, where I also worked as a Master Surgeon for over four years. I then cleared the challenging American Board of Hair Restoration Surgery (ABHRS) examination in Chicago, the USA, thereby becoming one of the handful of doctors in India to have earned the prestigious & only certification of ABHRS for hair transplantation globally. I'm the first Indian to be elected to the Board of Directors of ABHRS, which is a matter of great pride for me. The

ABHRS exam stands as the only psychometrically and statistically validated examination for hair restoration surgery. For more information you can visit [www.abhrs.org](http://www.abhrs.org).

**What technique of hair transplantation do you use. Please elaborate?**

There are two basic techniques that are available for hair transplantation worldwide. The FUT or the strip technique and the FUE or the follicular unit excision technique. I perform "The Advanced FUE Technique" using implanters. It is an extremely refined technique of hair restoration performed only by a handful of surgeons globally.

In this technique, individual hair follicles are manually plucked out from the back of the head by a minimally invasive technique and a disposable handheld device. They are then implanted one by one in the bald patch without the creation of any reception holes, using a pen-like device called the implanter. There is minimal handling of grafts resulting in almost 99 per cent survival of the hair follicles. In this procedure no incision or stitches are required.

**How much does a hair transplant cost?**

The cost varies depending on the number of grafts required, the area to be covered, the quality of instruments, the technique used, the experience of the doctor, facilities and infrastructure of the clinic.

**When can you expect to see full results?**

Full results can be expected within nine to 12 months.



The results are so natural that no one can make out that transplant has been done.

**Is hair transplant painful?**

It's a painless procedure barring the first few minutes when local anaesthesia is given. Once the effect of anaesthesia sets in, the patient does not feel any pain.

**Is it necessary to shave one's head to get a hair transplant done?**

NO. Unshaven sessions are possible at our clinic.

**How long does the procedure take?**

The hair transplant procedure takes five to six hours. Patients can go home the same day and resume normal work the very next day.

**Who performs surgery at your clinic?**

The complete implantation is done by me. Technicians are not allowed to perform surgeries in my operation theatre.

**What is the USP of a hair transplant procedure at your clinic?**

Since I perform the surgery and take full responsibility, the patient is in the safest hands. I use the Advanced FUE procedure using implanters which gives dense hair with natural looking results. Patients can resume normal activities from the next day. There is no need to shave the hair. We have a state-of-the-art facility wherein all sterilisation protocols are strictly followed.

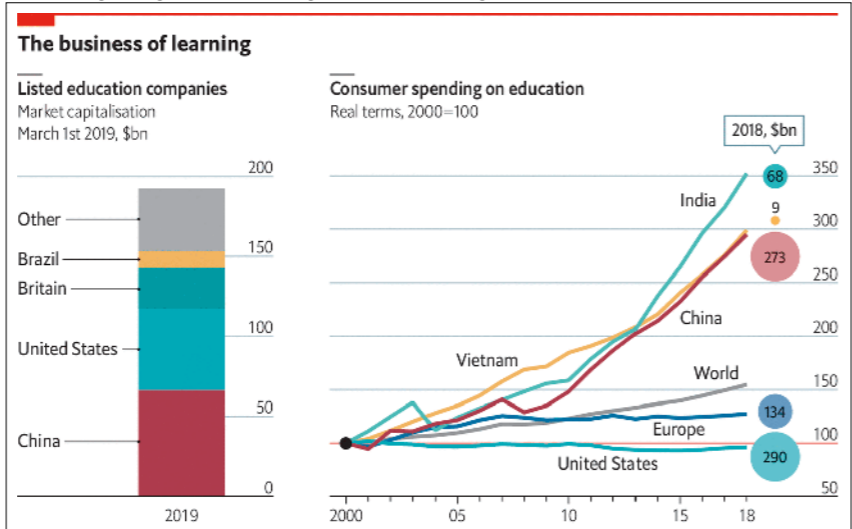
“The demand for flexible, on-demand learning solutions has increased, with students seeking customised content and delivery that fits their schedules and specific requirements.”

Sachin Sandhir, Founder and CEO of GENLEAP

EDUCATIONAL TECHNOLOGY MARKET SIZE IN INDIA (IN US\$ BILLION)		
Segment	2020	2025 (Projection)
K-12	US\$1.16 billion	US\$4.3 billion
Test preparation	US\$0.8 billion	US\$3.99 billion
Online certification	US\$0.58 billion	US\$1.38 billion
Skill development	US\$0.26 billion	US\$0.73 billion
<b>Total</b>	<b>US\$2.8 billion</b>	<b>US\$10.4 billion</b>

Courtesy india-briefing.com

There is a growing trend of investing in education among Indian consumers.



Courtesy economist.com

learn and when they want to learn it. “As a result, the demand for flexible, on-demand learning solutions has increased, with students seeking customised content and delivery that fits their schedules and specific requirements,” says Sachin Sandhir, Founder and CEO of GENLEAP, India’s first DNA-based self-discovery and career management platform.

**A PERFECT BLEND**

Recognising the staying power of offline learning and, indeed, the necessity to work in cohesion, the industry has now shifted focus to a hybrid model, combining online and offline learning. For instance, in a spate of recent collaborations between prominent EdTech companies and brick-and-mortar teaching centres—BYJU’s acquired Aakash and started BYJU’s Tuition Centre; Physics Wallah created PW Pathshala; and Unacademy started Unacademy World and Unacademy Center as their offline brands.

**MONEY TALKS**

The proof is in the pudding, as they say. The fact that all these private and government-led initiatives and

changes are making an impact is evident in the financial investments coming their way, despite the downturn. As per EdTechReview, a reputed education platform, several of these major players received massive funding in 2022: BYJU’s (US\$800 million), Allen Career (US\$600 million), upGrad (US\$435 million), Eruditus (US\$350 million), and Physics Wallah and LEAD School (US\$100 million each).

Girish Singhania, CEO of EduBridge, an EdTech company, says, “Workforce development

platforms and skill development platforms received handsome funds from angel investors and venture capitalists for propelling the youth from underserved parts of the country to secure placement opportunities at reputed multinationals. These consolidations bridge the technological gap and ensure that they (the companies) evolve from strength to strength.”

Essentially, the EdTech industry in India is on a sharp learning curve. It remains to be seen if they pass with flying colours! ⚙️

TOP TABLE: india-briefing.com; BOTTOM GRAPH: economist.com



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