

# MONTHLY SECTOR UPDATE

# EDUCATION



“

Most problems of teaching  
are not  
problems of growth  
but  
helping cultivate growth.”

- Noam Chomsky

1 We Believe

2 Steering  
the Course

3 Reports in  
Review

4 On the Trail

## We Believe

India's development model relies on building competent, sustainable and resilient societies, where learning communities of school and college systems lay the foundations to drive inclusive growth. While COVID-19 has challenged the very premise of our education provision, can we use this moment in time to effect a dramatic shift in the New Education Policy? We hope that the experiences from different parts of the country as a response to alternate learning approaches straddling offline and online can help inform policy across primary, secondary and tertiary education.

It is imperative that we start looking at education from the lens of our students. In the race for academic excellence, our 'learning blinders' has created a divide between the decision-makers and the beneficiaries. An ASSOCHAM-Primus Partners survey recorded that 88% of student were missing out on interactions with their teachers, peers, and friends while 51% of students missed extracurricular activities such as physical education, sports, art, music, and dance. Mental health which has proved to be an area of concern impacting physical and emotional well-being, needs more attention in the education policy.

This period has brought out the realisation that the 21st century skills required to navigate the learning landscape are beyond those imparted on an ordinary school/ college day. Much of the knowledge and experience sharing that took place over the ether during the 'Covidean'-scape involved virtual collaboration and can continued to be used effectively to explore the uses of a blended classroom. To transition to digital systems which make learning viable we need to innovate EdTech models responsibly to honour 'no child left behind' in letter, spirit and action.

While educators understand that the classroom may have its limitations, it still remains a place for locating great possibilities of experiential learning. While much has been written about the hastily made transition, it is important to understand that there has been a shift in the entire teaching and learning process and may impact generations to come. One thing is clear - the classroom will never be the same again.

“It is important to provide equal opportunities for learning to each individual. It is only through education that he/she will be able to stand out as an equal with others from different walks of life irrespective of religion, economic background, gender and colour.”

-Renu Punhani  
Education Expert  
Primus Partners

Charu Malhotra  
Co-founder & MD  
Primus Partners

# Steering the Course

## Ensuring Free doesn't mean Quality Free | Free learning content available through the PM's e-VIDYA Programme

The recent economic package announced by the Finance Minister comes as relief to the education system in the wake of COVID-19 pandemic. The PM e-VIDYA initiative introduced 12 DTH channels for K-12 learning content psycho-social support platform named 'Manodarpan'. The initiative employs platforms such as Diksha, Swayam, Shiksha Vaani, IITPAL, Radio and e-content for the visual and hearing impaired. Top 100 universities were also permitted to begin online courses by May end. While this extensive platform aims to increase access to learning content, the challenge lies in ensuring that the quality of education is not compromised on. There needs an emphasis on assessments and examinations as we try to rebuild our educational infrastructure.

“

Students must get a platform for feedback and comments on digital learning. After all we are the ones who are affected the most and are used as subjects for the experiment of digital teaching.”

- Mr Bhumanyu Singh  
Mayoor Choupasani  
School, Jodhpur

## Is this the year PPP shines? | Opportunity for PPP business models in education

The increased prominence in distance education has reinforced the requirement and scope for our government institutes to be equipped with phygital processes and infrastructure and with the additional demand-supply gap, we are currently falling short. A Public-Private Partnership model for education has been widely promoted for its advantages which include the expansion of the reach of the public-school system, innovations in existing government school infrastructure, development of curriculum and administrative processes, increase in the access to quality affordable schools and greater accountability on behalf of government institutions. India will require policy support to enable PPP models to be pushed to the fore. This can be tapped into through Rs 3,000 crore outlined in the Union Budget for investments in education and an expected 38% growth in blended learning over the next few years. The NITI Aayog has also recognized the benefits and is promoting PPP in Indian medical colleges.

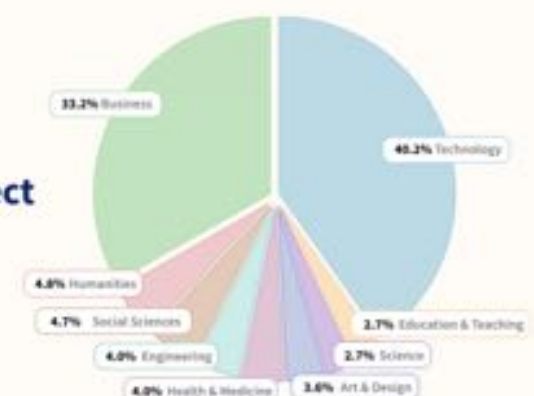
## Online graduation ceremonies: An event of the future | Preference for specialized education, MOOCs guiding the way

With the gaining popularity of specialized courses and degrees, platforms like Coursera have had a 644% increase in sales over the past month, with most pursuing business or technology courses. The recent resurgence of digital education has provided EdTech

players with the opportunity to further tap into accreditation and provide online certification, diplomas and degrees. The provision of online degrees by tertiary education institutes are supported by the reform to University Grants Commission (Online Courses) Regulation in 2018.

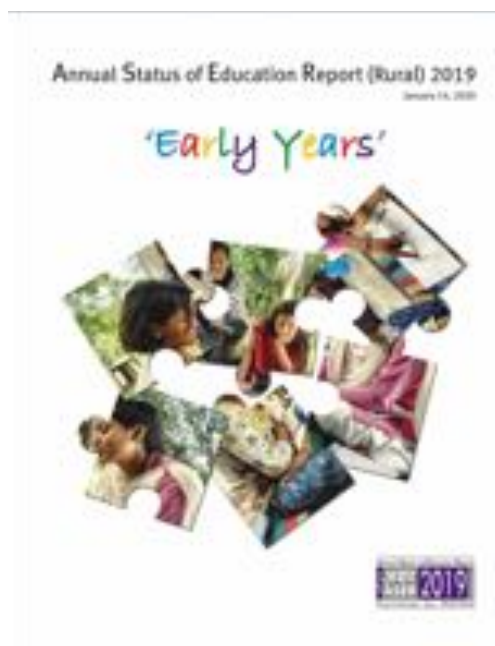
CLASS CENTRAL

### Microcredential Distribution by Subject





# Reports in Review



## Annual Status of Education Report (Rural) 2019 'Early Years'

**Summary:** The ASER 'Early Years' Report explored the performance of children aged 4-8 across key competencies namely; cognitive, socio-emotional, language and numeracy development.

**Key Findings:** The report recorded three educational trends for this age group. First, 30% and 16% of children of age 3 and 4 respectively are not enrolled in preschool, especially in Rajasthan, Uttar Pradesh and Bihar. Second, while the appropriate age to begin formal schooling is age 6, around 33% of students were already beginning at age 5, a 23% majority being enrollments in government schools. Third, the report established a correlation between strong cognitive, language and numeracy skills and improved performance on subject learning.

**Recommendations:** First, Anganwadis have the capability to increase their exposure and access to children of the ages 3 and 4 as well as improve school readiness activities for its students. Second, a standard age for school enrollment needs to be enforced, as younger children face learning drawbacks as opposed to their older peers. Third, students need to improve their developmental skills at an early age rather than be pushed into subject learning in order to provide a smooth transition to formal learning. [Read Here](#)



## How artificial intelligence will impact K-12 teachers

**Summary:** The report surveyed around 2,000 teachers from four EdTech strong countries: the United Kingdom, and the United States, Canada and Singapore. The aim was to analyze the time spent by teachers on 37 key activities the effects of the implementation of digital solutions within the classroom.

**Key Findings:** The study found that on average 69% of teachers find time to be the biggest impediment to personalized learning in the classroom and spend most of their time preparing for their lessons, evaluating and administrating as opposed to directly interacting and engaging with their students. It was found that on average 61% of a teacher's time is spent away from the student.

**Recommendations:** First, investment needs to be focused on serving teachers and improving student performance. Second, having simple yet effective solutions gradually equips the teacher with the skills to comfortably handle more advanced and complete solutions. Third, collaboration between similar stakeholders for insight and innovation towards best practices. Fourth, teachers and students must be equipped to efficiently adopt EdTech solutions through blended learning and flipped classrooms. [Read Here](#)

# On the Trail

## Top 5 News on the sector

The Finance Minister announces multi-mode access to digital and online education, a psycho-social support platform and the start of university online courses. [Read Here](#)

Promotion of innovation and entrepreneurship a focus of the newly launching MHRD DTH digital TV channel. [Read Here](#)

On the recommendation of a NIMHANS report, the Karnataka State Department of Primary and Secondary Education ordered a ban on online education upto class 5. [Read Here](#)

Formal recognition provided by the MHRD to Teacher Education Programs conducted by Central and State Government Institutions. [Read Here](#)

The MHRD is working on guidelines for the reopening of schools post lockdown, stated to take place post August. [Read Here](#)

## Top 5 Sector Player News

The Kerala State Literacy Mission Authority has developed online courses and will set up learning centers for Tribal and other marginalized sections. [Read Here](#)

The Indian Olympic Association is hosting the nation's first ever event to promote Olympic values-based education and activities for sports education. [Read Here](#)

The University Grants Commission has ratified the suggestions for higher education institutions to contribute towards funding of the Swayam portal. [Read Here](#)

The higher-education platform, UpGrad has witnessed a jump in sales post COVID as more people opt in for online education upskilling opportunities. [Read Here](#)

IIT Delhi to partner with private players and launch online certifications, paperless exams and AI based attendance. [Read Here](#)

“ In the time of this pandemic, we have created a firefighting response via online learning without any impact analysis. We need to create a balance between the physical and digital learning experience for our education system in the long run.”

- Mrs Rekha Krishnan  
Principal, Vasant Valley  
School

## About Primus Partners

Primus Partners has been set up to partner with clients in 'navigating' India, by experts with decades of experience in doing so for large global firms. Set up on the principle of 'Idea Realization', it brings to bear 'experience in action'.

Idea Realization'— a unique approach to examine futuristic ideas required for the growth of an organization or a sector or geography, from the perspective of assured on ground implementability.

India is and will continue to be a complex opportunity. Private and Public sector need trusted advisory partners in order to tap into this opportunity. Primus Partners is your go-to trusted Advisory for both public and private sector organizations involved intricately with nation building, and the creation and growth of robust corporations as engines of progress.

Our core strength comes from our founding partners, who are goal-oriented, with extensive hands-on experience and subject-matter expertise, which is well recognized in the industry. Our core founders form a diverse cohort of leaders from both genders with experience across industries (Public Sector, Healthcare, Transport, Education, etc), and with varied specialization (engineers, lawyers, tax professionals, management, etc).

Primus Partners brings experience of working in more than 30 countries with private and public sector, including working with Government of India, building and leading large consulting teams at the leadership level, and creating one of the largest public sector consulting practice in India. They also represent 200 person years of experience in leading global and Indian consulting firms and the public sector.

The founding team is supported by a distinguished advisory board that includes experts with leadership experience across government, large corporate and notable civil society organisations.

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