ED SET GO

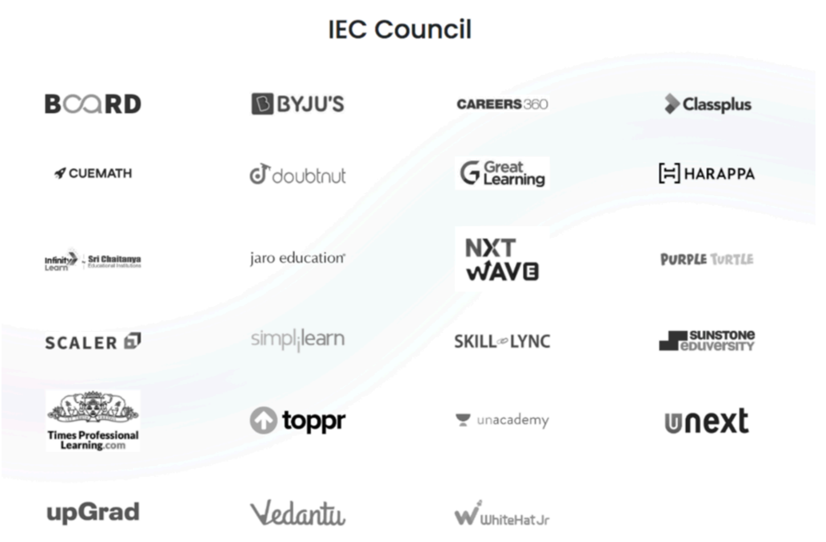
School edtech wants to be a whole other vibe

A new association of edtechs will rival the old guard

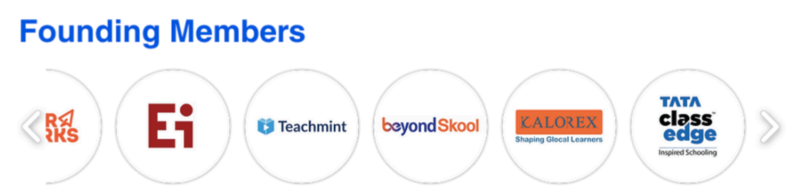
Monday, 17 July 2023

There's a new edtech body in town. The Association of School Ed-Tech Providers, or ASEP, was announced last week to promote "digital education" in India, with a special focus on implementing the tenets of the new National Education Policy (NEP) in Indian schools.

ASEP already looks and feels different to its older counterpart, the Indian Edtech Consortium (IEC). (We've written about IEC a whole bunch in this newsletter). There's almost no overlap in the listed members of these two bodies.



ASEP's founding members:



Now, both these groups are nascent, and as Indian edtech matures, these memberships may diversify and overlap. It's clear, though, that ASEP has made a concerted effort to differentiate itself from IEC. While the IEC is focused on the relationship between edtechs and their end consumers, ASEP is a dedicated platform for the growing category of "school edtech".

The first wave of edtech belonged decidedly in the consumer internet category. Edtech products were supplemental, after-school, tuition-replacements, often built without disrupting the *system* of learning too much. They were D2C, and had very little to do with schools. In parallel, schools were adopting tech too, but their approach to digitising themselves looked very different. Tech within school ecosystems existed either as hardware (tablets, smartboards) or as backend learning management systems.

When hit with the pandemic, this bifurcation quickly melted away. Neat categories gave away to messy, free-for-all land grabs of student consumers. All of a sudden, schools found that on a digital plane, they were almost irrelevant, and consumer edtechs found they were vastly underprepared to teach within the rigorous boundaries of a typical school day. This chaos birthed a few new ideas too, like the edtech Teachmint, which taught teachers how to run online classes. But mostly, the pandemic left the edtech sector confused about where it fit in.

ASEP, I now argue, is a clear signal that school edtech wants to carve out its own territory, and its own reputation.

Proactive, not reactive

Let's be fair. IEC's character was heavily influenced by the circumstances around its creation. Consumer edtech was reeling from a slew of accusations about its unethical sales practices and lack of any real accountability for edtech firms. Things got so bad that parliamentarians were debating how to regulate Indian edtech, China-style. IEC's members offered to calm tempers by committing to self-regulate, deal with consumer grievances, and basically shield edtechs from any real official penalties.

In theory, IEC did want to move from a reactive body to a more proactive one, lobby for its members' interests, and maybe even win a few government contracts. But its DNA is still heavily engineered to solve grievances first, keep its stakeholders happy, and then figure out a way to add more agendas.

You can even argue that IEC ran so a body like ASEP could walk. The former, at least, tried to improve the optics around edtech, and became a sponge for some of the damaging PR about its member companies. (Byju's might have single-handedly ruined this effort, though).

So, ASEP's starting point can be different. More proactive, more compliant. And most importantly, more school-oriented.

PPP pipe dreams

ASEP's intentions are clear—it's going to provide a bridge between schools and the kind of tech-driven innovations that the National Education Policy (NEP) wants to bring. Consumer edtech maybe flashy and cutting edge, but it doesn't always translate well to the needs of a K-12 classroom. Instead, companies like LEAD, EI, and Teachmint—all ASEP founding members—have built products specifically for schools, and can tap into the current need for these schools to digitise. It's website says as much:

> *The pandemic deeply impacted the overall schooling system which is now estimated to pivot towards a learner centric model with critical pieces related to faculty development, pedagogy, infrastructure undergoing various degrees of transformation. Emerging key thrust areas including learning management system adoption, peer learning, hybrid model for learning teaching delivery, internet connection, online assessments, and availability of digital devices require collective response from ed tech players in terms of defining acceptable standards and quality.*

Like I mentioned earlier, the pandemic left the learning ecosystem quite muddied. Classrooms can't completely de-digitise, and they shouldn't. Teacher training, assessments, personalised feedback, and remediation are all things that can be complemented with tech, provided tech doesn't just replace human interaction.

It's also a matter of state policy now that classrooms shouldn't lose their digital edge. Post-Covid, the NEP doesn't just want to introduce more tech to classrooms, but also create common quality standards that edtechs in the future will have to adhere to if they want to collaborate with private and public schools. It's useful, then, to have an industry body that can lobby for the interests of school-tech providers before these standards are set.

In fact, school edtech sees itself as an essential part of NEP implementation in schools. In a interview about ASEP, this what Mihir Gupta, the co-founder of Teachmint, said:

> *…there exists a significant gap in the dialogue today surrounding the sustainable impact of technology in education. Through the ASEP, we are dedicated to bridge this gap by enabling and empowering the existing school ecosystem and bolstering digital infrastructure for both educators and learners…*

As a category, school edtech will have a much wider ambit than consumer edtech. From putting schools online and managing their backend to training teachers to creating digital content that's compatible with all types of classrooms. While the core need for good educators may never go away, how much is covered in a physical classroom and what can be taught digitally could look very different in the future. I can think of two early uses. One, formative assessments and practice could become automated. Second, we're looking into a future where climate disasters, constant migration, and new career pathways might disrupt the traditional physical classroom. Schools have to account for uncertainty.

From a business perspective, the school-based edtech model has the kind of uninterrupted access that consumer edtech can only dream of. School edtech providers can expand their total addressable market to basically all years of schooling, and beyond.

That said, school edtech may have the luxury of multi-year contracts and better access to teachers, parents and students in one shot, but they also have to deal with schools as their main customers, who are notoriously bad at shifting strategies and paying for services promptly. Complying with the NEP might add some momentum, but school edtech and ASEP have their work cut out for them.

Back Bench

Byju's, the world's largest edtech, has the uncanny and persistent ability to churn out good news right on the heels of very bad news. When the media reported on the delay in its financial reports, news broke soon after that Byju's had raised more money. Just as large scale layoffs were being reported, Byju's announced that it would take Aakash, its best-performing acquisition, to the public markets. When three board members resigned on the same day as its auditor Deloitte, however, it finally seemed like Byju's couldn't spin a counter narrative immediately. The dread only grew when the Indian financial regulator came knocking to scrutinise its book-keeping.

But Byju's has been quick to recover. On Thursday, the company announced that TV Mohandas Pai, the former co-founder of Infosys and former SBI chairman Rajnish Kumar would form Byju's newly constituted "Advisory Council". Pai's and Kumar's years of experience can potentially lessen Byju's spiralling financial and governance woes. Kumar has already indicated that there is a need for a clean-up in how the world's largest edtech runs its business. Phrases like fixing their "financial hygiene" are doing the rounds. Pai and Kumar both seemed convinced that Byju's heart is in the right place, and they've only veered off track because they were too busy growing at a breakneck speed. The duo's public comments indicate they've come in to clean house, and bring some grown-up supervision to Raveendran's personal fiefdom.

It remains to be seen how much the founders abide by all the new advice they'll get. Outside counsel hasn't really worked well before with Byju's, and it eventually resulted in the three board members quitting over "differences". Maybe Pai and Kumar, as prominent startup advisors, will arrest the rot in the system. Or maybe they are strategic shields, put up by the company against further raids and summons from financial regulators. Better yet, the Pai and Kumar connection can make Byju's look like a viable investment option again. This time, maybe public lenders can get in on the game too.

Byju's can ensure a whole roster of good news stories this way to counter more unravelling threads.

That's a wrap for this week. Please write to edsetgo@the-ken.com with your ideas and feedback.

Take care.

Regards,

Olina

Share this edition

Here's the link to this edition for you to share. Or you can use the easy share buttons below

https://the-ken.com/edsetgo/school-edtech-wants-to-be-a-whole-other-vibe/

Ed Set Go is published by The Ken—a digital, subscription-driven publication focussing on technology, business, science and healthcare.

Kenrise Media Private Limited, 3582, 2nd Floor, 13th G Main, 4th Cross, Doopanahalli, Indiranagar, Bangalore 560008