



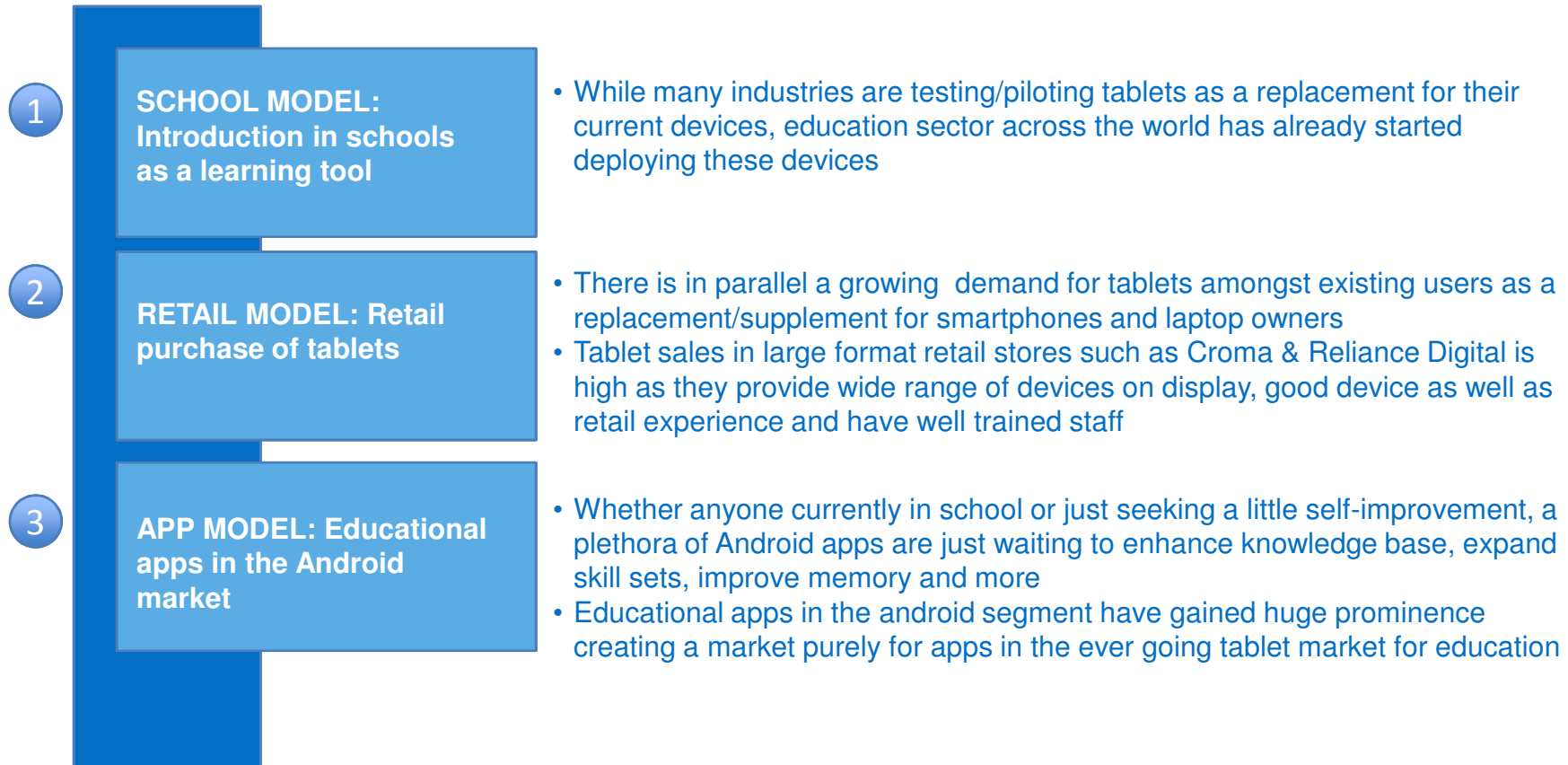
Aiding Personalized Learning with Tablets

Classteacher Learning Systems

9th December 2011



Tablets in the education sector in India exist in the following segments



Tablets are being adopted as primary devices in various industry verticals for diverse uses and applications



Healthcare

Typical use cases of tablets in the Healthcare industry include:

- Electronic Medical Records
- Speech Therapy
- Digital Imaging
- Patient Education
- Sign out
- Billing

Education

Typical use cases of tablets in the Education industry include:

- Digitized Textbooks
- Annotate Notes and Textbooks
- Interactive apps for education
- Note taking
- Streaming of educational content

Aviation

Typical use cases of tablets in the Aviation industry include:

- Flight Charts
- Access to Terminal Approach & Procedures Charts
- Airport/Facility Directory
- Weather Briefing
- Altitude Charts

Retail

Typical use cases of tablets in the Retail industry include:

- Point of sale terminals
- Customization
- Sales assistant
- E-commerce
- Digital Signages
- Online catalogs

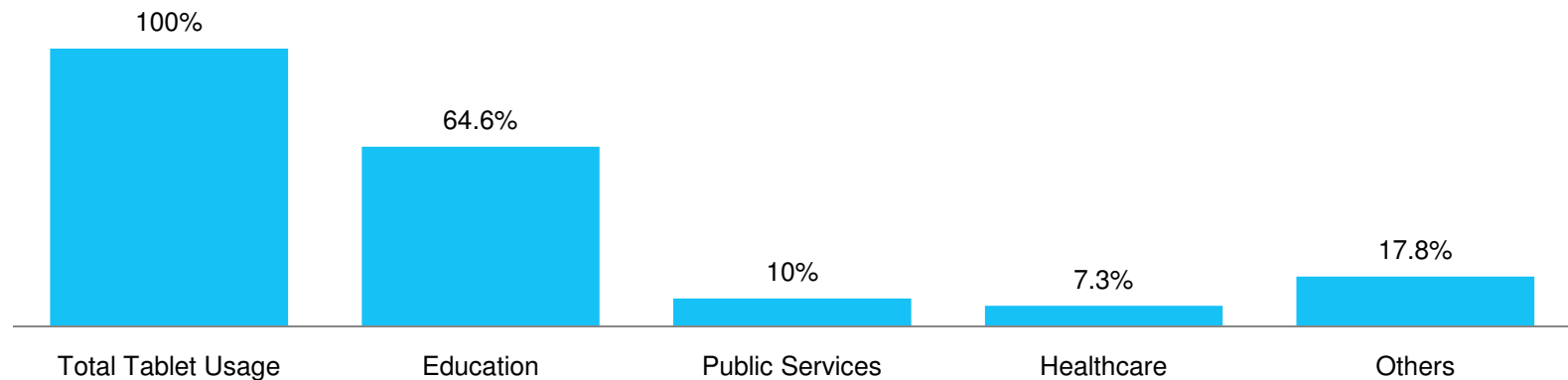


While some industries are still in the pilot mode, education industry across the world has gone ahead to adopt tablets full time



Large scale tablets deployment across the world – Share by Industry Vertical (July 2011)

July 2011



- While many industries are testing/piloting tablets as a possible replacement for their current devices, education sector across the world has already started deploying these devices
- Various universities and colleges are providing tablets to faculty and students (sometimes as loaner devices for the duration of the course) for downloading digital textbooks, podcasts, assignments, etc.



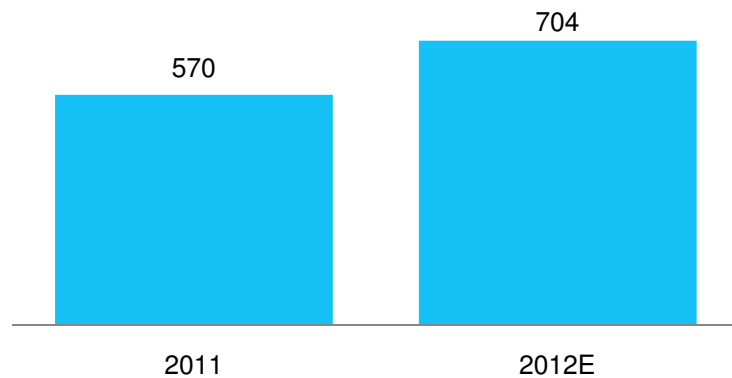
Sources: CC Analysis, iPad Pilots – K12 Learning

Indian Education sector is armed with high spending towards IT infrastructure in schools



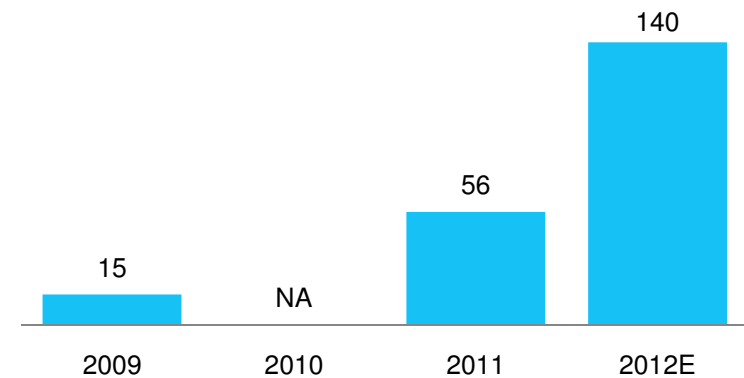
IT spending of Indian Schools

In USD millions

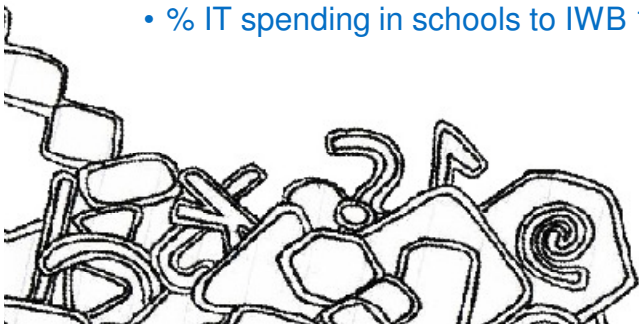


IWB Sales in India

In USD millions



- IT spending of Indian schools is increasing at a CAGR of 19% per annum indicating the readiness of the Indian education market of new technology
- Currently, about 3000 schools are estimated to contain 280,000 IWBs
- Sales on IWB estimated at 70,000 with net revenues of 700crore INR (\$140million) in the year 2012
- % IT spending in schools to IWB 10.1% in 2011 and 19.1% in 2012E



Sources: Springboard research report; Future Source Consulting

Tablets in Indian schools to be deployed in two models Trolley model and One tablet per child (OTPC) model



- Trolley model pioneered by Classteacher in India features use of tablets by multiple students in a school
- The innovative ClassPad Trolley are designed as a resourceful means of storing and charging holding 40 tablets in each
- ClassPad trolleys feature one trolley (40 tablets) for every section of nearly 400 students with a 1:10 tablet to student ratio

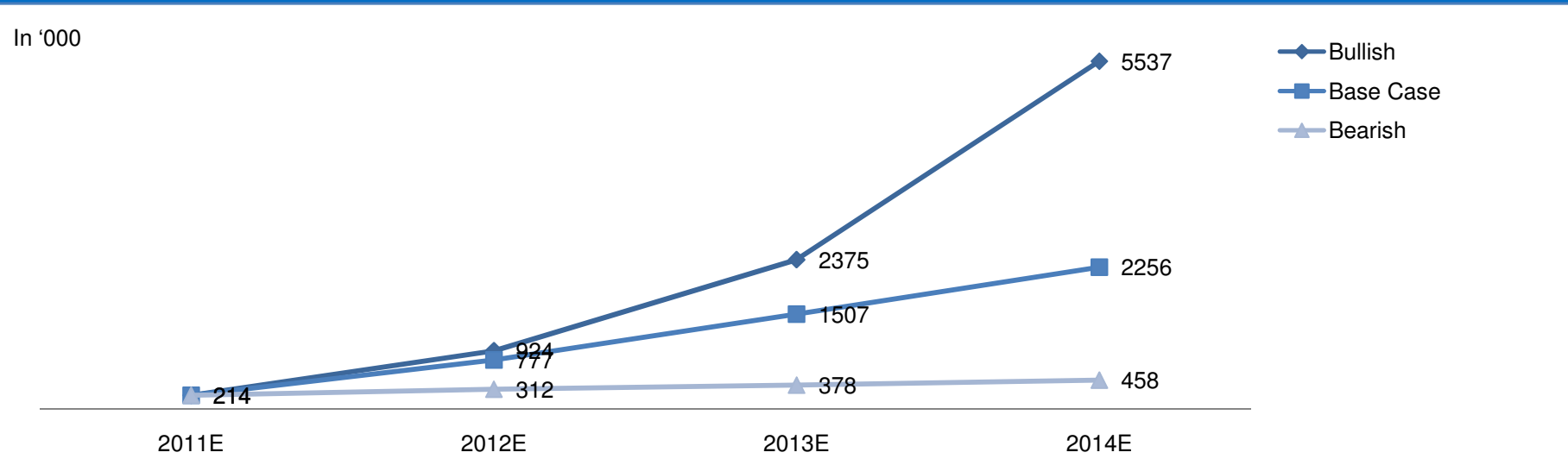


- The One tablet per child model ensures a tablet each in the hands of students in top level schools in India
- This tablet to serve a personalized device for each student to gain valuable learning under the guidance of the teacher

Tablets in India could potentially reach the sales of over 5.5 million in 2014



Forecasts for Tablet Sales in India by Year (2011-2014, in Thousands)



- Globally, tablets are following the adoption path of smartphones, and not of netbooks. It is widely believed it will be a similar case in India as well
- In 2012, majority of the sales are expected to come from the retail channels, and the consumers (especially, mid-tier segment) will choose to purchase either a smartphone or a tablet but not both



Source: CC Estimates and Analysis

Opportunities for Tablet ecosystem in India to explode



There exist a number of potential drivers on the demand side...

Parameter	Key Statistic
Number of active internet users in India	~ 97 million
Number of existing PC users in India	Over 52 million
Number of TV households in India	~ 141 million
Number of unique mobile device owners in India	Over 540 million
Number of unique smartphone users in India	Over 20 million

- Coupled with the Indian government's ambition for the education sector through Aakash and the forecast for global tablet sales in 2012 (projected) at over 110 million; India presents a huge opportunity in the educational tablet market



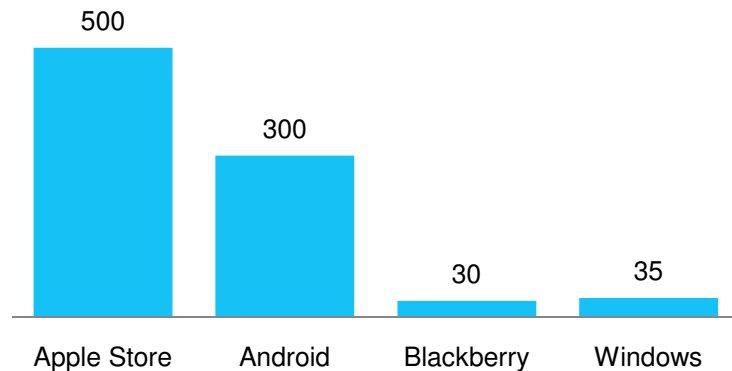
Source: CC Estimates and Analysis

The apps (available on each platform's app store) play a key role in the tablets ecosystem



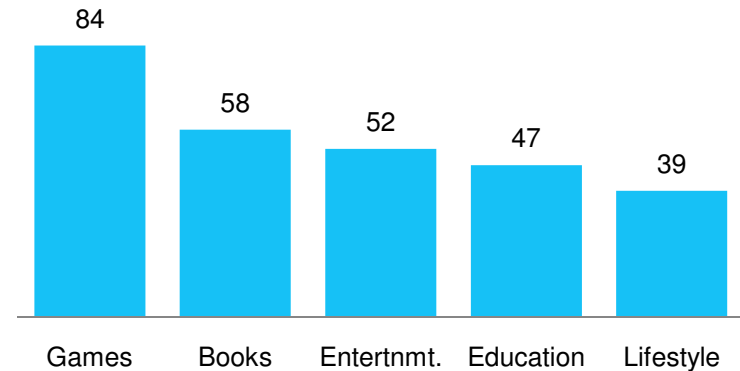
¹No. of active apps by Operating System App Store

In '000, Sept 2011

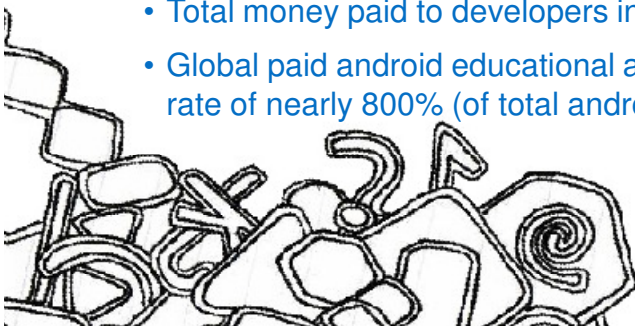


Top Categories of Apple App Store Apps ('000)

In '000

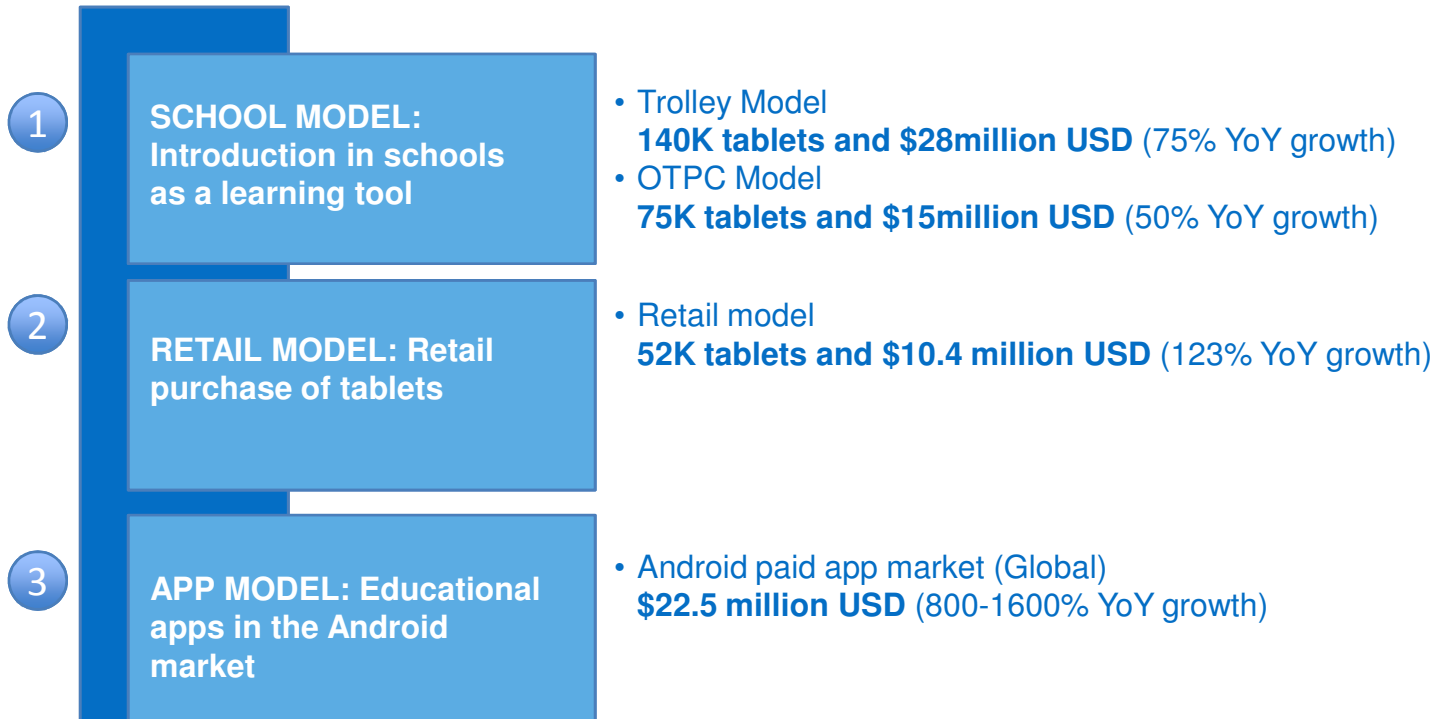


- With a total no. of apps of near 300k, android based apps have clocked nearly 7 billion installed apps
- Android Market features 67% of free apps – the highest percentage of any major app store – compared to 37% for Apple App Store
- Educational apps contribute to 9.4% of total apps in the apple store. Extrapolating the total educational apps in the Android store should be in the range of ~ 28200
- Total money paid to developers in the Android market - \$240 million compared to \$3.4billion for apple developers
- Global paid android educational app market can be estimated at **9300 apps and \$22.5million** with a YoY growth rate of nearly 800% (of total android app market)



Sources: CC Analysis; Androlib, Apple, Piper Jaffray estimates
¹Note: includes both smartphone and tablet apps

Tablet market estimates for tablets in India for 2012



- ❑ India represents a huge market in terms of tablet deployment across schools, through the retail model or development of paid apps in the android market
- ❑ Total market in 2012 can be estimated in India conservatively as ~ 55million USD with estimates of over 100% YoY growth



ClassPad App – ClassPad as a Learning Tool (1/2)



ClassPad **changes the experience of accessing learning material** for both Students and Teachers

1

➤ **Knowledge at your fingertips!**

- Interactive tool to engage students and make classroom study more interesting
- Teachers can now utilize teaching hours for explaining a given topic in detail
- Students can now download teacher notes instantly and provide undivided attention to class lessons

2

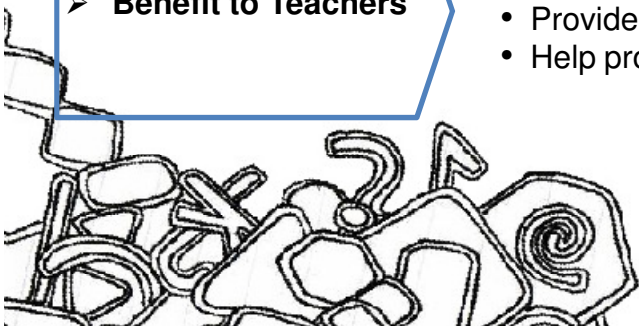
➤ **Personalized and Interactive Learning**

- Various content K-12 modules pushed by the teacher will be accessible on the tablet
- iPerform and Assessment Centre also integrated in the ClassPad
- Ebooks, Classwork, Lessons from the teacher will also be accessible on the ClassPad

3

➤ **Benefit to Teachers**

- Teachers can provide their own content instantly
- Conduct tests and assessment hassle free
- Provide classwork through ClassPad
- Help provide personalized feedback to students on the basis of their understanding



ClassPad App – ClassPad as a Learning Tool (2/2)



ClassPad Student Dashboard:

- ☐ My Lessons
- ☐ My Tests
- ☐ My Class Work
- ☐ eBooks
- ☐ Games



STUDENT DASHBOARD

- Students can easily see the class modules
- Access etests allocated by the teacher
- Complete homework anywhere, anytime!
- Read eBooks
- Play Games!



Don't leave an image, leave an impression!



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