

**India School Market By Level of Education (Primary, Upper Primary, Secondary, Higher Secondary), By Ownership (Government, Local Body, Private Aided, Private Unaided), By Board of Affiliation (Central Board of Secondary Education (CBSE), Council for the Indian School Certificate Examinations (CISCE), State Government Boards, Others (NIOS, IBs, etc.)), By Region, Competition, Forecast & Opportunities, 2020-2030F**

Market Report | 2024-11-30 | 81 pages | TechSci Research

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**Report description:**

India School Market was valued at USD 52.36 Billion in 2024 and is expected to reach USD 106.15 Billion by 2030 with a CAGR of 12.5% during the forecast period. The India School Market is a multifaceted sector encompassing a wide range of educational services, infrastructure, and associated products catering to the diverse educational needs of school-age children. This market includes different types of schools, ranging from government and private institutions to international schools, offering varied curricula such as CBSE, ICSE, state boards, and international syllabi like IB and Cambridge. India has the world's largest population of 580 million people aged 5 to 24, giving a great opportunity in the education sector. India has the highest number of school-going pupils, at over 250 million. The Study In India (SII) program seeks to enroll over half a million foreign students in higher education in India by 2047. The primary focus of the India School Market is to provide formal education across pre-primary, primary, secondary, and higher secondary levels. This market also covers vocational training and skill development programs that supplement traditional education, preparing students for higher education and employment. Key products within this market include digital learning tools, textbooks, stationery, uniforms, and technological infrastructure like smart classrooms. The market has seen a significant rise in demand for online education platforms, educational apps, and AI-driven personalized learning tools, especially post-pandemic. The India School Market is heavily influenced by government policies and initiatives aimed at improving

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the quality of education and increasing accessibility, such as the National Education Policy (NEP) 2020, which emphasizes holistic development, multidisciplinary learning, and the use of technology in education. The market is also shaped by socio-economic factors, parental expectations, and the increasing penetration of technology in rural and urban areas alike. The competitive landscape of this market is fragmented, with numerous players ranging from traditional educational institutions to Ed-tech startups. The market is witnessing rapid growth due to factors such as increasing literacy rates, government initiatives for education reform, rising disposable incomes, and a growing emphasis on quality education. Moreover, the demand for international education and specialized schools is on the rise, driven by the aspirations of a burgeoning middle class. The India School Market is poised for significant expansion, with increasing private sector participation, technological advancements, and evolving educational paradigms that focus on skill-based learning and digital literacy.

#### Key Market Drivers

##### Government Initiatives and Policies

Government initiatives and policies play a crucial role in driving the India School Market. The introduction of the National Education Policy (NEP) 2020 marks a significant shift in the Indian education system, aiming to transform the traditional learning methods into more holistic, flexible, and multidisciplinary approaches. The policy emphasizes the importance of early childhood care and education (ECCE), foundational literacy and numeracy, and the integration of technology at all levels of education. The NEP 2020 also advocates for increased public spending on education, which is expected to enhance the overall quality of education and infrastructure in schools. Additionally, schemes like Sarva Shiksha Abhiyan (SSA), the Mid-Day Meal Scheme, and the Right to Education (RTE) Act have significantly improved access to education, particularly in rural and underserved areas. The government's push for digital education through initiatives like the Digital India program and e-learning platforms such as DIKSHA (Digital Infrastructure for Knowledge Sharing) has further boosted the market by integrating technology into classrooms, making education more accessible and interactive. Under the Interim Budget 2024-25, the Department of School Education & Literacy's budget allocation for FY 2024-2025 is Rs. 73,498 crores (USD 8.82 billion). The expansion of infrastructure through initiatives like the Atal Tinkering Labs and the Pradhan Mantri Schools for Rising India (PM SHRI) scheme also contribute to the growth of the market. These initiatives aim to develop model schools with state-of-the-art facilities, which not only improve the quality of education but also set benchmarks for other institutions. The government's focus on skill development through vocational training programs in schools aligns with the industry's demand for a skilled workforce, making education more relevant to the job market. Further, public-private partnerships (PPPs) are being encouraged to bring in expertise, resources, and management practices from the private sector into government schools, thereby enhancing the quality of education.

##### Rising Demand for Quality Education

The demand for quality education in India is a significant driver of the school market, fueled by the aspirations of an increasingly educated and economically empowered middle class. Parents today are more aware of the importance of a well-rounded education that goes beyond academic excellence to include extracurricular activities, life skills, and global exposure. This shift in parental expectations is driving demand for private and international schools that offer world-class infrastructure, innovative teaching methods, and a curriculum that prepares students for global opportunities. The proliferation of private schools offering CBSE, ICSE, and international curricula like the International Baccalaureate (IB) and Cambridge International Examinations (CIE) is a testament to this growing demand. These schools often provide state-of-the-art facilities, experienced faculty, and a wide range of extracurricular activities, attracting parents willing to invest in their children's education.

The increasing competition for college admissions, both in India and abroad, has led to a greater emphasis on holistic development, encouraging schools to focus on overall student growth, including cognitive, social, and emotional development. This has resulted in the rise of schools that offer specialized programs, such as STEM education, arts and humanities, and sports, catering to the diverse interests and talents of students. The demand for quality education is also driving the adoption of technology in schools, with smart classrooms, e-learning platforms, and AI-driven personalized learning becoming increasingly common. Parents are willing to pay a premium for schools that integrate technology into their teaching methods, offering a more interactive and engaging learning experience for their children.

##### Technological Advancements in Education

The integration of technology in education is revolutionizing the India School Market, making learning more accessible, interactive, and personalized. The advent of digital classrooms, e-learning platforms, and educational apps has transformed

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traditional teaching methods, offering students a more engaging and immersive learning experience. The COVID-19 pandemic further accelerated the adoption of technology in education, with schools rapidly transitioning to online learning platforms to ensure continuity of education during lockdowns. Smart classrooms equipped with interactive whiteboards, projectors, and internet connectivity are becoming increasingly common in schools across India. These classrooms facilitate a blended learning approach, combining traditional teaching with digital resources such as videos, simulations, and online assessments, making learning more interactive and engaging for students. The use of AI and machine learning in education is also gaining traction, with personalized learning platforms that adapt to the individual learning pace and style of each student, offering tailored content and assessments. In FY22, Indian edtech businesses got a total of USD 3.94 billion in funding across 155 agreements. PhysicsWallah, an edtech platform, became India's 101st unicorn in June 2022 after collecting USD 100 million in Series-A funding from WestBridge Capital and GSV Ventures, valuing the company at USD 1.1 billion. The proliferation of smartphones and internet connectivity has enabled the rise of e-learning platforms and educational apps that provide students with access to quality education anytime, anywhere. Platforms like BYJU'S, Unacademy, and Vedantu have gained immense popularity, offering a wide range of courses and resources that supplement traditional classroom learning. These platforms also offer live classes, doubt-clearing sessions, and interactive quizzes, making learning more interactive and student-centric. The government's push for digital education through initiatives like the Digital India program and the establishment of e-learning platforms like DIKSHA has further boosted the adoption of technology in schools. These initiatives aim to bridge the digital divide and make quality education accessible to students in remote and underserved areas.

#### Urbanization and Socio-Economic Changes

Urbanization and socio-economic changes are significant drivers of the India School Market, as they lead to increased demand for education and better infrastructure in urban areas. The rapid urbanization of India, with a growing number of people moving to cities for better job opportunities and living conditions, has resulted in a rising demand for quality schools in urban centers. This trend is particularly evident in metropolitan cities like Delhi, Mumbai, Bangalore, and Hyderabad, where the demand for private and international schools offering world-class education is on the rise. The increasing disposable incomes of urban households have also led to a shift in parental expectations, with parents willing to invest more in their children's education. This has driven the demand for schools that offer modern infrastructure, innovative teaching methods, and a curriculum that focuses on holistic development. The rise of dual-income families in urban areas has further contributed to this trend, as parents seek schools that provide a safe and nurturing environment for their children, with facilities such as daycare and after-school programs. The socio-economic changes brought about by globalization and exposure to global education standards have led to a growing demand for international schools in India. These schools offer curricula like IB and Cambridge, which are recognized worldwide, making them an attractive option for parents who aspire to send their children abroad for higher education. The increasing number of expatriates and NRIs returning to India has also contributed to the demand for international schools that offer a global perspective in education. The shift towards nuclear families in urban areas has led to a greater emphasis on education as a means of securing a better future for children. This has resulted in a growing demand for schools that offer a well-rounded education, focusing on academic excellence as well as extracurricular activities, life skills, and character development.

#### Key Market Challenges

##### Access and Equity in Education

Despite significant progress in improving access to education in India, achieving equity remains a major challenge. The disparity in educational infrastructure, resources, and quality between urban and rural areas, as well as between different socio-economic groups, poses a significant barrier to achieving universal access to quality education. Government schools, particularly in rural and underserved areas, often suffer from inadequate infrastructure, shortage of qualified teachers, and lack of basic amenities such as clean drinking water and sanitation facilities. The Right to Education (RTE) Act mandates free and compulsory education for children aged 6 to 14 years, but its implementation faces several challenges, including insufficient funding, lack of awareness among parents, and socio-cultural barriers such as child labor and early marriage. The high dropout rates, particularly among girls and children from marginalized communities, further exacerbate the issue of access and equity in education. The digital divide remains a significant challenge, with students in rural areas and low-income families having limited access to digital devices and internet.

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## Infrastructural Deficiencies

India's school market faces significant infrastructural challenges, particularly in rural and remote areas. Despite government initiatives such as the Right to Education Act and the Sarva Shiksha Abhiyan, which aim to improve the quality of education, many schools still lack basic facilities like adequate classrooms, sanitation, and drinking water. Poor infrastructure directly impacts student attendance and learning outcomes. In rural areas, the absence of well-maintained school buildings, libraries, and laboratories severely limits the educational opportunities available to children. Moreover, the digital divide exacerbates these issues, with many schools lacking access to the internet and digital learning tools, further widening the gap between urban and rural education. Addressing these infrastructural challenges requires substantial investment from both the government and the private sector. Public-private partnerships can play a crucial role in improving school infrastructure, particularly in underserved areas. However, ensuring that these initiatives are effectively implemented and reach the intended beneficiaries remains a significant challenge.

## Quality of Education and Teacher Training

Another major challenge in the India school market is the quality of education, which is closely linked to the availability of trained and motivated teachers. Despite various efforts to improve teacher training and recruitment, there remains a significant shortage of qualified teachers, particularly in subjects like mathematics, science, and English. Many teachers, especially in rural areas, lack the necessary qualifications and are often underpaid, leading to low motivation and high turnover rates. The quality of teacher training programs is also inconsistent, with many teachers not receiving adequate training in modern teaching methods and technologies. This directly affects student performance, as poorly trained teachers are unable to deliver the curriculum effectively or engage students in the learning process. To address this challenge, there needs to be a focus on improving teacher training programs and providing continuous professional development opportunities for teachers. Additionally, better remuneration and working conditions for teachers could help attract and retain qualified professionals in the education sector.

## Regulatory and Policy Issues

The India school market is heavily regulated, with numerous policies and guidelines governing the establishment, operation, and management of schools. While these regulations are intended to ensure the quality and accessibility of education, they often create significant challenges for schools, particularly private institutions. One of the key regulatory challenges is the complex and often inconsistent approval processes for setting up new schools. Private school operators must navigate a maze of bureaucratic hurdles, including obtaining multiple licenses and adhering to various state-specific regulations. This not only increases the cost of establishing new schools but also discourages potential investors from entering the market.

Frequent changes in education policies and regulations create uncertainty for schools, making it difficult for them to plan and implement long-term strategies. For example, changes in the curriculum, assessment methods, or teacher recruitment policies can disrupt school operations and negatively impact students' learning experiences. To overcome these challenges, there is a need for more streamlined and transparent regulatory processes, as well as greater consistency in education policies across states. Engaging with stakeholders, including private school operators and educators, in the policy-making process can also help ensure that regulations are practical and conducive to the growth of the school market.

## Key Market Trends

### Digital Transformation in Education

The India school market is experiencing a significant shift towards digital education, driven by the increasing penetration of smartphones and the internet, particularly in urban areas. The COVID-19 pandemic further accelerated this trend, as schools were forced to adopt online learning platforms to ensure continuity in education. The adoption of digital tools in education is not limited to online classes. Schools are increasingly incorporating technology into their teaching methods, using tools such as smart boards, educational apps, and virtual reality to enhance the learning experience. These technologies not only make learning more interactive and engaging but also help cater to different learning styles, making education more personalized.

The digital transformation of education also presents challenges, particularly in terms of accessibility. While urban schools are rapidly adopting digital tools, rural schools often lack the necessary infrastructure, such as reliable internet connectivity and access to digital devices. This has led to a digital divide, where students in urban areas have access to a wealth of online resources, while those in rural areas are left behind. To address this issue, there is a need for targeted government initiatives to improve digital infrastructure in rural areas. Public-private partnerships can also play a crucial role in bridging the digital divide,

with private companies providing technology and training to schools in underserved areas. Efforts should be made to ensure that digital education is inclusive, with content and platforms available in multiple languages and accessible to students with disabilities.

#### Increasing Focus on Holistic Education

Another key trend in the India school market is the increasing focus on holistic education, which emphasizes the development of the whole child, including their physical, emotional, and social well-being, in addition to academic achievement. This trend is being driven by growing awareness of the importance of mental health and well-being, particularly in the wake of the COVID-19 pandemic. Holistic education includes a range of activities and programs aimed at promoting physical fitness, emotional resilience, and social skills. Schools are increasingly incorporating physical education, yoga, and mindfulness programs into their curricula, as well as offering extracurricular activities such as sports, music, and art, which help students develop a range of skills and interests. One of the key drivers of this trend is the growing concern about the impact of academic pressure on students' mental health. With increasing competition for college admissions and jobs, students are under more pressure than ever to perform well academically. This has led to a rise in stress and anxiety among students, prompting schools to focus more on mental health and well-being.

#### Segmental Insights

##### Level of Education Insights

In the India School Market, the primary education segment is the leading segment based on the level of education. The primary education segment in India has the highest enrolment numbers compared to other segments. This is primarily because primary education (typically covering Grades 1 to 5) is mandatory and forms the foundation of a child's education. Several government initiatives, such as the Sarva Shiksha Abhiyan (SSA) and the Right to Education (RTE) Act, have focused heavily on improving access to primary education across the country. These programs have significantly increased enrolment rates in primary schools, particularly in rural and underserved areas. Primary education is crucial for developing basic literacy and numeracy skills. There is a strong emphasis on ensuring that all children acquire these fundamental skills, leading to a higher focus on the primary segment. There is an increasing awareness among parents about the importance of early childhood education, which often leads to an emphasis on quality primary education. The growth of pre-primary education (kindergarten) also feeds into the primary segment, ensuring that children are prepared for formal schooling from an early age. A significant portion of government spending on education is allocated to primary education. This includes funding for infrastructure, teacher training, mid-day meal programs, and learning materials, all aimed at improving the quality and reach of primary education. The government's policies aimed at achieving universal access to education have been particularly effective at the primary level, ensuring that almost all children of school-going age are enrolled in primary schools. Primary schools are widespread across both urban and rural areas, with almost every village in India having access to at least one primary school. This extensive reach further cements primary education as the leading segment. The quality of education at the primary level is a priority, with various programs aimed at improving teacher quality, curriculum, and student outcomes. The National Education Policy (NEP) 2020 also emphasizes foundational literacy and numeracy, further highlighting the importance of the primary segment. Given these factors, the Primary Education segment holds a dominant position in the India school market, driven by government support, widespread access, and the critical role it plays in the overall education system.

##### Regional Insights

In the India school market, the North region emerges as a leading area due to several key factors. The North region includes states like Delhi, Haryana, Uttar Pradesh, Punjab, and Rajasthan, which are known for their strong emphasis on education and significant investments in educational infrastructure. The North region, particularly Delhi NCR, is economically prosperous, allowing for higher educational expenditure. This prosperity translates into better facilities, higher enrollment rates, and a competitive academic environment.

The governments in this region have implemented various policies aimed at improving education. For instance, initiatives like the Midday Meal Scheme and scholarships for economically disadvantaged students have bolstered enrollment and retention rates. The North is home to some of India's most prestigious schools and educational institutions, including those affiliated with Central Boards like CBSE (Central Board of Secondary Education) and ICSE (Indian Certificate of Secondary Education). This concentration of quality institutions attracts students from across the country. Rapid urbanization in cities like Delhi, Gurgaon, and Noida has led

to the development of world-class educational infrastructure. This region is also a hub for educational technology companies, further enhancing the quality of education. States like Delhi and Haryana boast higher literacy rates, which reflect the importance placed on education by the population. This cultural emphasis on education has driven demand for better schools and educational services. The North region's leadership in the India school market is characterized by its strong economic base, governmental support, urban development, and a deep-rooted cultural value placed on education.

#### Key Market Players

- St. Xavier's Collegiate School
- The Doon School
- Shree Swaminarayan Gurukul International School
- Little Flowers Public Sr. Sec School
- The Mother's International School
- Bombay Scottish School
- St. John's High School
- Sainik School
- Greenwood High International School
- Emerald Heights International School

#### Report Scope:

In this report, the India School market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### □□ India School Market, By Level of Education:

- o Primary
- o Upper Primary
- o Secondary
- o Higher Secondary

#### □□ India School Market, By Ownership:

- o Government
- o Local Body
- o Private Aided
- o Private Unaided

#### □□ India School Market, By Board of Affiliation:

- o Central Board of Secondary Education (CBSE)
- o Council for the Indian School Certificate Examinations (CISCE)
- o State Government Boards
- o Others (NIOS, IBs, etc.)

#### □□ India School Market, By Region:

- o North
- o South
- o East
- o West

#### Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the India School Market.

#### Available Customizations:

India School Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

#### Company Information

- Detailed analysis and profiling of additional market players (up to five).

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