



SCHOOL ERP AND SMART-CAMPUS IOT

ZenCampus

School ERP with an IoT layer: AI attendance, bus tracking, CCTV, energy and environment monitoring and a parent app, priced from ₹10 per student.

Complete v1.0 cutoff 2026-09-15 Session 1 · ZenCampus India · GCC

Validate before selling Confidence medium 54/100

Rax has made no ZenCampus sales: do not sell the smart-campus stack yet; validate the compliance layer (CCTV record, bus alerts on AIS-140 feeds, DPDP consent) with three paid Chennai CBSE pilots and the 300 legacy users, publish one price, and decide by June 2027.

33,151 CBSE schools bound by the 2025 CCTV clause ● Verified S153 S53	184 ₹ Cr Serviceable market, five southern states, per year (2026) ● Estimated S13 S64 S81 S89	0 ZenCampus sales to date (legacy system: 300 users) ● Rax-supplied S183 S6	6 ₹ Cr Obtainable by 2031, about 150 campuses ● Estimated S6 S60	40.0 % Private unaided school enrolment share, 2025-26 ● Verified S13	13 May 2027 DPDP child-data rules commence ● Verified S33
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AT A GLANCE

- Rax has made no sales of the current ZenCampus product: the AI version has 0 users and the only live base is 300 legacy Smart School Campus users; the site's 350+ institutions claim is unreconciled marketing. ● Rax-supplied S183 S6 ● Publicly observed S1
- The paying market is growing: private unaided schools enrol 40.0% of Indian children (9.89 crore of 24.72 crore in 2025-26) and their count rises while government schools shrink. ● Verified S13
- Demand is regulation-led and dated: CBSE clause 4.7.10 (audio-visual CCTV, 15-day retention) binds 33,151 schools, AIS-140 bus tracking is law, DPDP child-data rules start 13 May 2027. ● Verified S153 S53 S25 S33
- Incumbents are cheap and entrenched: Fedena at USD 999 a year, Entab at ₹40.74 crore revenue, NeoTrack tracking 25,745 school vehicles with free hardware; the integrated position is empty because it is unproven, not because it is defensible. ● Publicly observed S63 S64 S81

5. Government software goes to CMMI level 3 IT firms and cameras go to L1 bids; the serviceable market is about 4,866 large private schools in five southern states worth ₹184 crore a year. ● Verified S51 S167 ● Estimated S13
6. With two salespeople, the only routes that scale are Chennai CBSE groups, CCTV dealers as resellers and the legacy base; a realistic 2031 outcome is about 150 campuses and ₹6 crore. ● Estimated S6 S60 ● Recommendation

00 **Verdict**

KEY TAKEAWAYS

- Decision: do not sell the full smart-campus stack yet; validate ZenCampus as a compliance layer (CCTV record, bus alerts on AIS-140 feeds, DPDP consent) with three paid Chennai pilots and the 300 legacy users, and decide by June 2027. ● Recommendation
- Classification: Validate before selling, 54 of 100, medium confidence; readiness scores 4 of 15 because Rax has made no sales of the current ZenCampus product: the AI version has 0 users and the legacy Smart School Campus has 300. ● Rax-supplied S183 S6
- Demand is real, dated and private: CBSE clause 4.7.10 binds 33,151 schools, AIS-140 bus tracking is law, and DPDP child-data rules commence on 13 May 2027. ● Verified S153 S53 S25 S33
- The serviceable market is ₹184 crore a year in five southern states, but what two salespeople can win by 2031 is about ₹6 crore from 150 campuses. ● Estimated S12 S64 S81 S89
- The first ninety days are about credibility, not selling: one price list, site claims that match the audit, an AIS-140 integration and a DPDP pack. ● Recommendation

The decision

Rax should not take ZenCampus to market as an integrated smart-campus platform in 2026. It should spend nine months proving one narrower thing: that a Chennai CBSE school will pay for a single compliance record across its cameras, buses and parental consent, installed and serviced through a local CCTV dealer, with the ZenCampus ERP as the ledger underneath. ● Recommendation

The classification is **Validate before selling**, at **medium confidence**, on a score of 54 of 100. ● Inferred Under the charter's rule a score of 40 to 54 is Validate before selling; the product misses Pilot first by one point, and it is not Partner-led because buyer access scores 5, above the threshold of 4. ● Inferred Three facts drive it. Rax has made no sales of the current ZenCampus product: the AI-enabled version has 0 users, and the only live base is the legacy Smart School Campus with 300 active users. ● Rax-supplied S183 S6 The site's claims of 350-plus institutions and 96% retention are unreconciled marketing: no customer list, case study or review supports them, and they contradict Rax's own audit. ● Publicly observed S1 ● Rax-supplied S6 The demand that exists is regulatory and dated, not a wish for a smart campus. ● Verified S153 S25 S33 And the incumbents are cheap and already inside the schools, so an unreferenced vendor with two salespeople cannot win on features. ● Publicly observed S63 S64 S81 Confidence is medium, not high, because the two facts that would move the score most, what a "user" of the legacy system is and what it costs Rax to serve a campus, are not in the record. ● Unknown

Five findings that matter

The paying buyer is the private unaided school, and that base is growing. Private unaided schools enrol 9.89 crore children in 3,41,689 schools, 40.0% of national enrolment in 2025-26, up from 31.1% in 2021-22, while government schools lost 86 lakh students in two years. Government and aided schools get software free from the state (EMIS, Sampoorana, Shaala Darpan) and buy cameras as L1 goods bids on GeM, so they are not a software market for Rax. Where states do buy school software, they tender whole governance platforms to firms with CMMI level 3 and multi-crore IT turnover, as Gujarat's Vidya Samiksha Kendra RFP and Assam's Shiksha Setu 2.0 call show. ● Verified S13 S47 S48 S51 S167 ● Publicly observed S169

Regulation, not technology, creates the budget and the date. CBSE's notification of 21 July 2025 inserting clause 4.7.10 requires audio-visual CCTV across a campus with 15 days of retention as a condition of affiliation; every new school bus on permit must carry an ARAI-approved AIS-140 tracker with an emergency button; Tamil Nadu's April 2024 directive adds GPS and CCTV on every school bus; and the DPDP Rules put verifiable parental consent and security duties on anyone processing

children's data from 13 May 2027. Verified S153 S25 S31 S33 From 2025-26 CBSE also requires an APAAR ID, generated with parental consent on UDISE+, for every Class IX and XI registration, which makes clean student data a school chore an ERP can take over. Verified S155 A principal buys to pass an inspection. Nobody in the market uses Rax's "smart campus IoT" vocabulary. Inferred

The product is real but unproven, and its public claims hurt it. A live demo tenant shows working fee, attendance, transport and dashboard screens. But there is no named school, no accuracy data for face attendance, no AIS-140 approval for the GT-500M tracker, no ISO 27001, and only a web-app (PWA) parent app. There are also three conflicting prices: ₹10 per student in the decks, a custom quote on the site and ₹1,00,000 per licence on IndiaMART. Publicly observed S1 S2 S9 Verified S29 Rax-supplied S3 S6 The ₹7 lakh of FY2025-26 school-software revenue (0.9% of turnover) came from the legacy Smart School Management line; no ZenCampus sale has been made. Rax-supplied S7 S183

The integrated position is empty because nobody has proven it, not because it is defensible. Forty competitors were profiled. Fedena publishes USD 999 a year for unlimited users. Entab earns ₹40.74 crore from about 1,200 schools. Vidyalaya already integrates biometrics and vehicle tracking. NeoTrack tracks 25,745 school vehicles from Coimbatore and gives the hardware away free. Chennai dealers install a 16-camera school system for about ₹1.07 lakh. Publicly observed S63 S64 S81 S89 S133 Rax can win only where the buyer wants one accountable vendor for compliance, and only once a reference exists. Inferred

The route has to fit two salespeople and a damaged reputation. Referrals are dead and quality failures cost the ATM business about ₹3.22 crore in a year. Rax-supplied S7 The routes that fit are the legacy base (zero acquisition cost), Chennai CBSE groups (one contract, many campuses) and CCTV dealers who are already on campus at inspection time and want a recurring software margin. Publicly observed S89 S148 Recommendation Chennai's Sahodaya cluster of 300-plus CBSE schools means a failed first pilot would be known across the segment within a term. Publicly observed S148 Inferred

33,151

CBSE schools bound by the July 2025 CCTV clause; the dated obligation that gives ZenCampus a reason to be bought this year rather than someday. Verified S153 S53

Three numbers to remember

NUMBER	WHAT IT IS	WHY IT CHANGES THE DECISION	LABEL
33,151	CBSE schools under clause 4.7.10 (audio-visual CCTV, 15-day retention)	Sell the compliance record, not a platform; about 1,350 large Tamil Nadu private schools sit within a day's drive	Verified: S153, S53
₹184 crore a year	Serviceable market: 4,866 private schools above 500 students in TN, KA, TS, AP and PY (UDISE+ 2025-26) at ₹3.78 lakh each	Big enough to matter; transport is 60% of a campus contract, so bus alerts matter more than ERP price	Estimated: S12, S64, S81, S89
0	Sales of the current ZenCampus product to date (AI users: 0; legacy Smart School Campus: 300 active users)	No reference means no sale; the first job is to turn legacy users and pilots into named paying schools	Rax-supplied: S183, S6

A realistic 2031 outcome is ₹6 crore from about 150 campuses, with a range of ₹1.5 to ₹12 crore depending on whether a reference and a group win come early. That makes ZenCampus a fourth recurring revenue line, not a replacement for e-surveillance. Estimated S6 S60

What would change the verdict

Upward, to Pilot first, then Sell now: identify the 300 legacy users and have at least a third respond; get three pilots paid for and closed with signed outcome letters; get parent-app adoption above 80%; and sign two dealers by June 2027. That would lift readiness from 4 to about 9 and access from 5 to 7, taking the score to about 61. Sell now also needs readiness of 10 or more, meaning a named reference, a published price and an AIS-140 integration in production. Inferred Recommendation

Downward, to Defer: the legacy "users" turn out to be logins at a handful of schools; no school pays for a pilot by March 2027; pilot support runs above five tickets per campus per week after week eight; the cost-to-serve study shows a negative margin per campus; or a DPDP enforcement action or CBSE withdrawal removes the compliance urgency. ● Recommendation

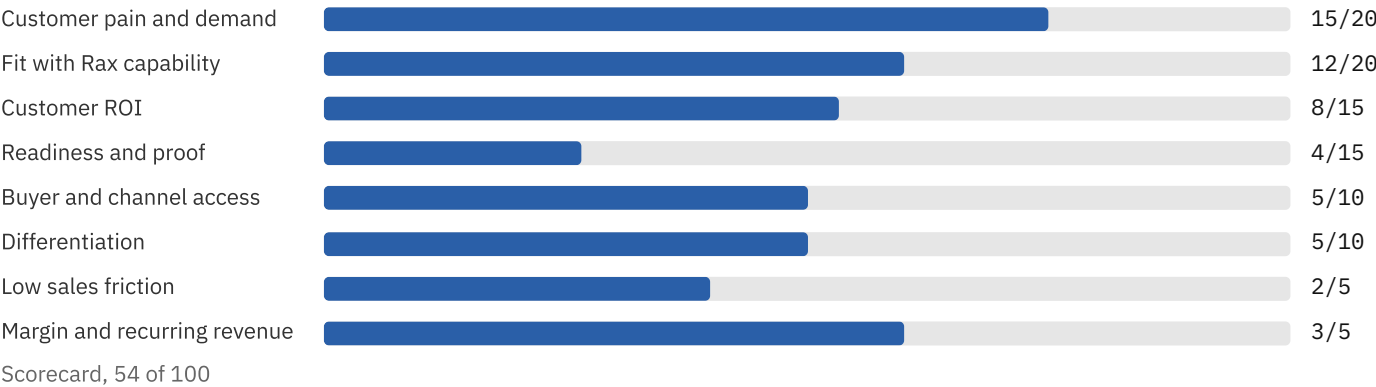
SO WHAT FOR RAX

Treat ZenCampus as a nine-month validation with a budget under ₹20 lakh and one ring-fenced salesperson, not as a launch. The only asset a new school vendor has is credibility, and today Rax's own site spends it. ● Estimated S89

● Recommendation

The first ninety days

ACTION	OWNER	MEASURABLE RESULT	LABEL
Identify all 300 legacy Smart School Campus users, call every one, and sign three as paid pilots or record why not	Sales	Named list by day 45; response rate above 30%; three pilot agreements by day 90	Recommendation
Publish one price list (per-student software at Fedena parity, per-campus hardware with AMC, per-bus transport) and remove the unreconciled 350+ institutions and 96% retention claims	Managing Director	Price list live by day 15; site matches the deck audit	Recommendation
Integrate one ARAI-approved AIS-140 device feed and ship native Android and iOS parent apps	Engineering	Live feed in the demo tenant by day 60; store listings by day 90	Recommendation
Write the DPDP data map, parental consent flow and 15-day CCTV retention procedure, with legal review	Engineering	Compliance pack in every proposal by day 60	Recommendation
Recruit two Chennai CCTV dealers and cost the service model per 1,000-student campus	Sales and Finance	Two dealer agreements; gross margin per pilot known by day 45	Recommendation



DIMENSION	SCORE	RATIONALE
Customer pain and demand	15/20	Dated, budgeted obligations exist for the private segment: CBSE clause 4.7.10 for 33,151 schools, AIS-140 and the Tamil Nadu bus directive, DPDP from May 2027, CBSE's mandatory APAAR IDs; private schools already spend ₹1 lakh-plus on CCTV (Maharashtra reports CCTV in 29,049 private schools) and ₹3,000 to 5,000 per bus per month. Demand for an integrated stack specifically is unproven. ● Verified S153 S31 S33 S53 S81 S89 S164
Fit with Rax capability	12/20	A working ERP with a demo tenant, free software engineering bandwidth, edge video analytics shipping in volume for banks, and an ISO 9001:2015 scope naming software and video analytics; but no school installation network, no ISO 27001, and a service record that stopped referrals. ● Rax-supplied S2 S7
Customer ROI	8/15	The buyer's believable ROI is compliance (passing the CBSE and RTO checks) and fee collection; teacher-time claims in the deck are unsourced; no Rax case quantifies payback. ● Inferred

DIMENSION	SCORE	RATIONALE
Readiness and proof	4/15	No sales have been made of the current ZenCampus product: 0 users on the AI version, 300 active users on the legacy Smart School Campus, no named reference, no AIS-140 path, no security attestation, a PWA-only parent app and three conflicting prices; the site's 350+ institutions claim is unreconciled marketing. The ERP core is live and demonstrable in a demo tenant. ● Rax-supplied S183 S6 S29 S9 S1 S2
Buyer and channel access	5/10	Chennai proximity to about 1,350 large Tamil Nadu private schools and a 300-user legacy base, but two salespeople, dead referrals, no dealer programme and no marketplace presence; state software tenders demand CMMI level 3, which Rax lacks. ● Rax-supplied S7 S13 S167
Differentiation	5/10	The integrated ERP-plus-safety position is empty but thin: incumbents already integrate biometrics and GPS, and NeoTrack and dealers own the hardware layer; Indian manufacture of analytics hardware is a real but unproven edge. ● Publicly observed S62 S81 S133
Low sales friction	2/5	Hardware installation, data migration from an incumbent ERP, parent retraining and a March to June buying window make the cycle long for a new vendor. ● Inferred
Margin and recurring revenue	3/5	Software subscription and AMC attach are recurring; hardware installation carries dealer-level margin; cost to serve is unknown inside Rax. ● Estimated S89

01 Product truth

KEY TAKEAWAYS

- ZenCampus exists as a working web application with a public demo tenant and real screens for billing, attendance, transport and dashboards; it is not a slide-ware product. Publicly observed | S1 | S2
- Its commercial facts conflict across Rax's own surfaces: "from ₹10 per student" in the decks, "custom quote" on the site, and "₹1,00,000 per piece, one-year licence" on IndiaMART. Rax-supplied | S3 | S6 Publicly observed | S1 | S9
- Rax has made no sales of the current ZenCampus product: the AI version has 0 users and the legacy Smart School Campus has 300 active users; the site's "350+ institutions, 96% retention" is unreconciled marketing that the audit contradicts. Rax-supplied | S183 | S6 Publicly observed | S1
- Nothing about the IoT layer is independently proven: no AIS-140 approval for the bus tracker, no accuracy report for CCTV face attendance, no ISO 27001, no named school reference. Verified | S29 Unknown
- The ERP core is the sellable part today; the smart-campus layer is a roadmap that must be proven on one campus before it is priced. Recommendation

What ships today

ZenCampus is presented as a school operating system: fourteen ERP modules (student records, staff and HR, ID cards, billing and accounts, online fee payment, payroll, academics and curriculum, timetable, transfer certificates, library, manual attendance, biometric attendance, inventory, hostel) and twelve smart-campus systems (AI face-recognition attendance from CCTV, CCTV monitoring, bus tracking, boarding alerts, environment sensing, classroom monitoring, energy, water level, parent circulars, analytics, alerts, appointments), with a parent app. Rax-supplied | S3 | S4 | S5

The public site zencampus.ai is a current Next.js application whose home page preloads product screenshots of an admin dashboard, a super-admin dashboard, a login screen, a transport "track vehicle" view, an AI attendance tracking view, an accounts day-book, a new-bill screen, a staff dashboard and redacted student and parent views. The page lists roles for Principal, Admin, Teacher, Parent, Facility Team, Security Team and Super Admin, and add-on modules for biometric and RFID. Publicly observed | S1

A live tenant at zencampus.ai/STJOHN, branded "DEMO PUBLIC SCHOOL", offers academic years 2024-25 to 2027-28, parent self-registration by OTP against a school-linked mobile or e-mail, and installs as a progressive web app on Android and iPhone. The login page lists Student and Staff, Fee and Billing, AI Attendance, IoT Monitoring, Vehicle Tracking, Library, Exams and Results, Hostel, Payroll and Accounts, and Analytics. This is the strongest public evidence that the software runs; it says nothing about how many schools run it. Publicly observed | S2

The product master records the line as RT-SW-SCM, Smart Campus Master, "a complete cloud based school management includes ERP, safety, security and campus data monitoring". Rax-supplied | S8 Rax's IndiaMART storefront still sells "SMART SCHOOL ERP Software" as a ₹1,00,000 per piece item with a one-year licence, Windows and Android platforms, English only, 2 GB RAM minimum and a one-week delivery time, alongside a "School ERP Total IT Solution" listing and a "Vehicle Tracking System GT-500M". Publicly observed | S9 | S10 | S117



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25+

Years of experience

350+

Institutions served

96%

Client retention

Inside the platform

app.zencampus.ai

LIVE DEVICE STATUS
96% Active

ZenCampus

Smart School Management, Advanced
Management, Staff Room, and everything in one place

Manage a Room

Room Allocation

IoT Resources

Attendance Tracking

Security Tracking

Facility

Energy Management

SECURITY ALERTS
All clear

WELCOME BACK!

Sign in to access to your dashboard

Academic Year
2025-2027

Username / Email
Enter your username or email

Password
Enter your password

Remember me

Forgot Password?

ENERGY USAGE
~28% today

CLASSROOM MONITORING
25+ areas live

The zencampus.ai home page as rendered headless on 15 September 2026, with the 350+ institutions and 96% retention claims and quote-based pricing tiers. Source S1

What is verified versus claimed

HEADLINE	CAPABILITY	RAX POSITION	INDEPENDENT EVIDENCE FOUND	LABEL
ERP core (fees, records, attendance, payroll)	14 modules, live	Demo tenant and product screens exist; no customer named	Publicly observed: S1, S2	
350+ institutions, 96% retention	Site claim, unreconciled	Rax states no sales of the current product; deck audit: AI product 0 users, legacy 300 active users; no customer list, case study or review supports the claim	Rax-supplied: S183, S6 contradict S1	
From ₹10 per student	Decks	Site shows custom quote; IndiaMART shows ₹1,00,000 per licence	Rax-supplied: S3; Publicly observed: S1, S9	
AI face attendance from CCTV	Live	No accuracy, lighting or false-match data; no test report	Unknown	
Bus tracking and boarding alerts	Live, GT-500M tracker	Rax absent from ARAI's AIS-140 approved list of 29 January 2026	Verified: S29	
DPDP-ready	Claim	Rules notified 13 November 2025; child-data rules commence 13 May 2027; schools exempt for safety tracking	Verified: S33	
Made in India, GeM-ready	Claim	No GeM catalogue listing for ZenCampus found	Unknown	
Energy, water, environment sensing	Live	No datasheet, sensor list or deployment	Unknown	

The bus-tracking point matters most. Since 1 January 2019 every new public service vehicle, which includes school buses on permit, must carry a vehicle location tracking device with an emergency button to the AIS-140 standard, type-approved by ARAI, feeding a state command centre. Verified S25 S26 S28 A parent-app tracker that is not an AIS-140 device does not discharge the school's legal duty; it can only sit alongside the approved device. Rax's GT-500M does not appear on the ARAI list, so ZenCampus bus tracking must either integrate with the school's existing AIS-140 device feed or be sold as a supplementary parent-alert layer. Verified S29 Inferred

Certifications held, applied and missing

Rax holds ISO 9001:2015 (Bureau Veritas, first cycle from 22 September 2025) with a scope that names software, edge video analytics and customised hardware and software design, plus ZED Silver; BIS CRS is applied for; TEC/MTCTE, CE, UL and other marks are not held. Rax-supplied S7 For a school buyer the relevant gates are different from the ATM business: ISO 27001 or SOC 2 for a cloud holding children's data (competitors such as Truein advertise both), a DPDP-compliant consent flow, and, for bus tracking, AIS-140 device approval. Publicly observed S84 Verified S33 None of the three is held. Which state tenders demand MeitY-empanelled cloud hosting or CMMI levels for school software is Unknown; no tender document for a school ERP was opened in this pass, only aggregator listings. Unknown

Installed base and references

Rax has made no sales of the current ZenCampus product. Rax-supplied S183 That statement matches the audited position: 0 users on the AI-enabled ZenCampus and 300 active users on the legacy Smart School Campus, where whether "users" means schools, logins or students is not stated. Rax-supplied S6 There is therefore no paying ZenCampus customer, no ZenCampus installed base and no ZenCampus reference to name. Rax-supplied S183 S6 The demo path "STJOHN" suggests a school of that name was used as a template, but no school is named publicly and no case study, testimonial or app-store listing for a ZenCampus parent app was found. Publicly observed S2 Unknown The ₹7 lakh of school-software revenue in FY2025-26 (0.9% of ₹7.91 crore) belongs to the legacy Smart School Management line, which is consistent with a few dozen small legacy licences and not with 350 institutions. Rax-supplied S7 Estimated S7

The site's "350+ institutions" and "96% retention" are therefore unreconciled marketing claims. They may count legacy installations over the years, but no list, date range or definition is published, and until Rax reconciles them with the audit they should be treated as unsupported and removed. Publicly observed S1 Rax-supplied S6 Recommendation

Service model

The sales deck promises onboarding, configuration, IoT installation and year-round support in four steps; the government deck adds AMC and on-ground service for district rollouts. Rax-supplied S3 S4 The internal record shows the company's current service pattern: one-year warranty with no AMC on its largest installed base (EVA units at bank sites), frequent support calls including at installation, sample-based QC, and a reputation problem that stops referrals. Rax-supplied S7 A school buyer sees the service model through the parent app: CampusCare's 124,000 Play Store reviews show that forced logins, monthly updates and PDF download failures generate the loudest complaints, so app quality is the service model. Publicly observed S61

Integrations and data duties that gate a sale

A school's evaluator asks what the system connects to before asking what it looks like. Five integrations decide it.

INTEGRATION OR DUTY	WHY THE BUYER NEEDS IT	ZENCAMPUS STATUS	LABEL
UDISE+ student data, APAAR ID and CBSE OASIS	CBSE schools must collect parental consent, generate APAAR IDs on UDISE+, print them on ID cards and integrate them into school IT; from 2025-26 an APAAR ID is mandatory for every Class IX and XI registration, uploaded after OASIS updates with the principal's Aadhaar e-signature	No UDISE+ or APAAR export evidenced; competing ERPs already advertise it	Verified: S154, S155; Publicly observed: S181
Payment gateway for online fees	Fee collection is the module schools pay for first	Online fee payment is listed; the gateway partner is not named	Publicly observed: S1 Unknown

INTEGRATION OR DUTY	WHY THE BUYER NEEDS IT	ZENCAMPUS STATUS	LABEL
AIS-140 vehicle tracking feed	The legal tracker on a permit bus is an ARAI-approved device reporting to the state backend	GT-500M not on the ARAI list of 29 January 2026; no integration evidenced	Verified: S29
Biometric and face terminals	Schools already own eSSL, ZKTeco or Hikvision terminals costing ₹4,700 to ₹28,000	Biometric and RFID offered as add-on modules; supported device list not published	Publicly observed: S1, S174, S175, S176
Cameras and recorders	IP cameras sold from 1 April 2026 must meet MeitY's security Essential Requirements; analog cameras are outside the ER regime	No certified camera list; EVA analytics not ER-tested	Verified: S158, S159
Hosting and security evidence	DPDP duties from 13 May 2027; group IT questionnaires	Hosting location, backup and breach process not published; no ISO 27001	Verified: S33 Unknown

Readiness gaps ranked by commercial impact

1. No sale of the current product, no named reference school and no public customer. A first paying CBSE school willing to be named closes this. Rax-supplied S183 Recommendation
2. Three conflicting prices. One published price list with per-student, per-module and hardware lines closes it. Recommendation
3. No AIS-140 path for bus tracking. Either an integration with approved devices (LocoNav, Fleetx-class feeds) or a partnership with an approved manufacturer. Verified S29 Recommendation
4. No security attestation for children's data. ISO 27001 or at least a documented DPDP data map, consent flow and breach process before the May 2027 commencement. Verified S33 Recommendation
5. No proof for CCTV face attendance. A measured pilot on one campus with published accuracy under real gate lighting. Recommendation
6. Site claims that contradict the audit. Removing "350+ institutions" and "96% retention" until they can be evidenced protects the only asset a small vendor has, which is credibility. Recommendation

Adjacent Rax products that bundle naturally

The Edge Video Analytics line (EVA, EVA Pro) is the plausible origin of the face-recognition attendance claim and already ships in volume for banks; the 4G LTE dual-SIM router and PCMU power unit fit a campus IoT gateway; X-Lite exit signage and emergency lights serve the fire and NBC compliance that CBSE clause 4.7.6 imposes; the Rack Monitoring Controller fits a school server room. Rax-supplied S7 S8 Verified S21 A bundled "safe campus" offer of CCTV analytics, exit signage and ERP is technically coherent, but each element must be proven separately before it is sold together. Recommendation

SIMPLE, EXPANDABLE PRICING

Start small. Add intelligence when the school is ready.

From ₹10 / student

Core ZenCampus platform

A low-friction starting point for school administration and parent-facing workflows.

Grows with AI

Add the capabilities you need

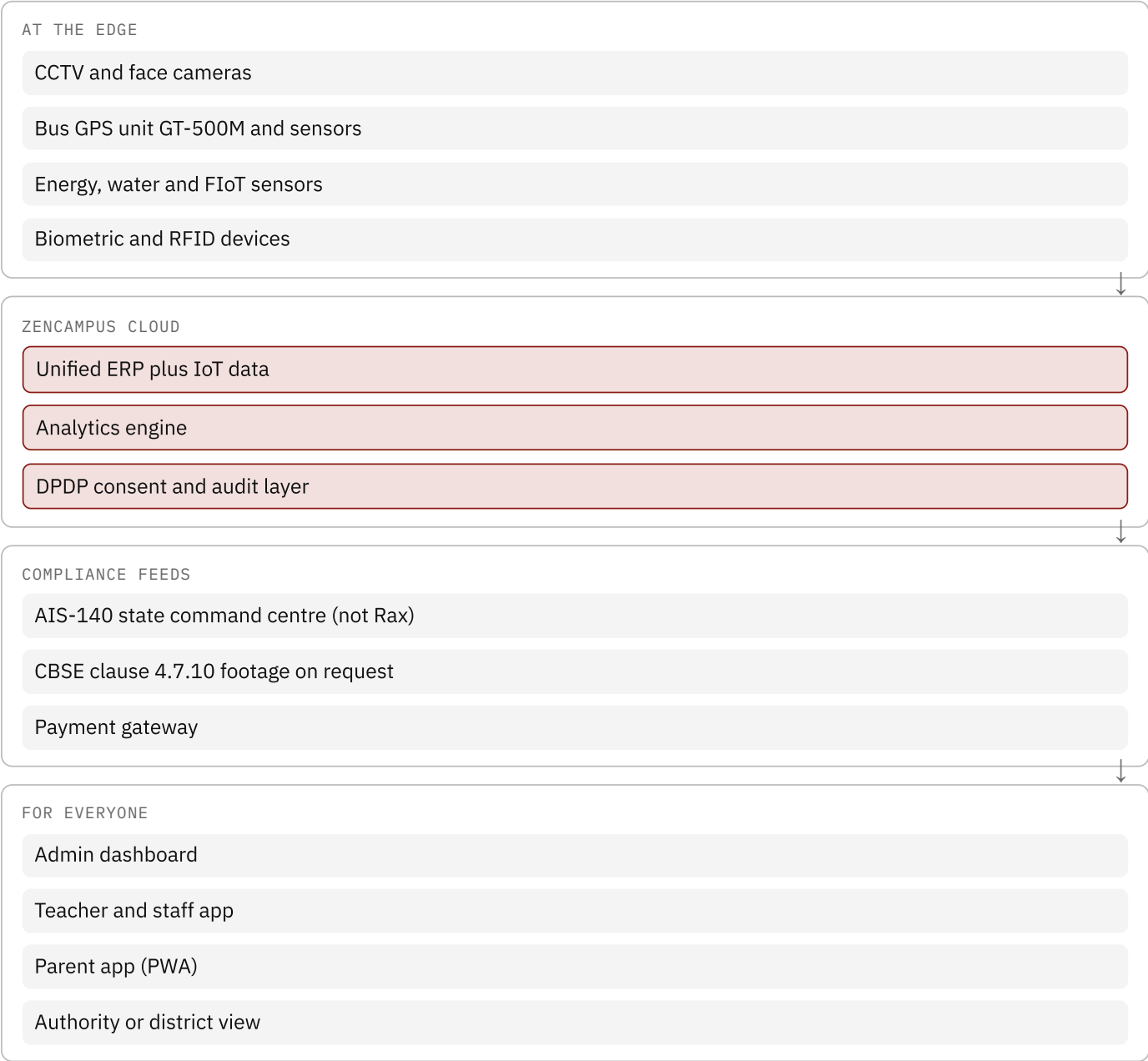
Per-student pricing increases as the school enables additional AI features and automation.

Enterprise rollout: Smart Campus hardware, IoT installation and ongoing support are scoped after a campus assessment. The non-AI predecessor, Smart School Campus, has 300 active users.



Slide 12 of the July 2026 sales deck: from ₹10 per student, rising with AI features; hardware scoped after assessment; 300 legacy active users. Source S3

ZenCampus as presented: edge devices to role-based apps



Rax's own architecture slide, redrawn: cameras, bus units, sensors and biometric devices feed one cloud with an analytics engine and DPDP consent layer, serving admin, teacher, parent and authority views. Only the ERP core and demo tenant are publicly observable; the device layer is unproven. ● Rax-supplied S3 S2

02 Market definition

KEY TAKEAWAYS

- The market is Indian K-12 school administration software plus three campus-safety hardware categories (CCTV, bus tracking, attendance) that regulation is pushing into the same buyer's budget. ● Verified S20 S25 S33
- The addressable buyer is the private unaided school: 3,41,689 schools with 9.89 crore students in 2025-26, 40% of national enrolment and rising, while government schools shrink. ● Verified S13 S17
- Government schools are a separate, largely closed market: free state systems (Sampoorna, Shaala Darpan, EMIS, face-attendance apps) and scheme-funded hardware bought on GeM. ● Verified S36 S47 S48 S49
- Value sits in recurring per-student software and in hardware installation margin; ERP licences are cheap, and the integrated "ERP plus IoT" position that Rax claims is genuinely thin in India. ● Publicly observed S64 S76 S79
- Rax sits at the design and software layer and has no installation or service network for schools; that layer is where competitors have built their moat. ● Rax-supplied S7 ● Inferred

Category and boundaries

The category is software and connected hardware that a school buys to run and secure a campus: student information and fees (the "school ERP"), parent communication apps, staff and student attendance systems, school-bus tracking with parent alerts, campus CCTV and its recording and analytics, and building telemetry (energy, water, air). ZenCampus claims all six.

● Rax-supplied S3 Out of scope are curriculum content, learning management and online classes (the B2C and B2B "EdTech" that IBEF sizes at ₹1,10,198 crore for 2024), smart-classroom hardware bought under Samagra Shiksha ICT grants, and higher education. ● Publicly observed S101 ● Verified S36

Adjacent substitutes a buyer will consider are free government platforms for government and aided schools (Kerala's Sampoorna, Rajasthan's Shala Darpan, KVS Shaala Darpan, Tamil Nadu's EMIS and Aadhaar-based attendance), spreadsheets plus WhatsApp groups plus Tally for fees in small private schools, and a standalone CCTV dealer plus a standalone GPS vendor for the safety layer. ● Verified S47 S48 S49 ● Inferred

The buyer universe, by management type

MANAGEMENT (UDISE+ 2025-26)	SCHOOLS	ENROLMENT (CRORE)	AVERAGE PER SCHOOL	WHO DECIDES TECHNOLOGY	LABEL
Government (state and central)	10,05,245	11.89	118	State department, KVS, NVS; scheme-funded	Verified: S13, S17
Government-aided	79,261	2.46	311	Management with state rules; often on state systems	Verified: S13, S17
Private unaided recognised	3,41,689	9.89	289	Owner, trust, principal; fee-funded	Verified: S13, S17
Others (madrasa, unrecognised)	about 40,000	0.47	119	Marginal	Verified: S12

Private unaided schools are 23.3% of institutions but 40.0% of enrolment, and their share has risen every year of the student-wise series: 31.1% in 2021-22, 31.9%, 34.4%, 38.8%, then 40.0% in 2025-26. ● Verified S17 Government schools lost 86 lakh students between 2023-24 and 2025-26 while private unaided schools gained 88 lakh. ● Verified S13 S17 The commercial market therefore grows even as total enrolment falls from 26.52 crore (2021-22) to 24.72 crore (2025-26). ● Verified S13 S16

Size matters more than count. In 2025-26, 58.0% of all schools had 100 students or fewer, 34.9% had 101 to 500 and only 7.0% had more than 500; a per-student ERP at ₹10 to ₹300 a year cannot support a sales visit to a 60-student school. ● Verified S13 UDISE+ publishes these bands for schools, not for students, and not by management, so how many students sit in each band is Unknown from the booklet. ● Unknown By board, CBSE lists 33,151 affiliated schools; CISCE and state-board counts were not verified from primary sources in this study, and state boards cover the rest, including almost all government

schools outside Delhi, KVs and NVs. ● Verified S53 ● Unknown The serviceable private market is therefore the top of the size distribution: Delhi's private schools average 715 students, Kerala's 559, Tamil Nadu's 507 (531 in 2025-26), Telangana's 381, Karnataka's 296 and Uttar Pradesh's 212. ● Verified S12 ● Estimated S12

Value chain

Component and platform vendors (camera OEMs such as Hikvision through Prama and CP Plus, AIS-140 device makers on the ARAI list, biometric terminal makers eSSL, Matrix and Realtime, payment gateways, cloud hosts) supply parts to three kinds of intermediary: ERP SaaS vendors that sell software direct and through resellers, CCTV and low-voltage integrators that sell and install hardware locally, and telematics vendors that bundle devices with a parent app. ● Publicly observed S29 S85 S86 S87 S88
● Verified S29 Installation and first-line service are almost always local; eSSL states that it does not support end users directly and that technical support is the dealer's responsibility. ● Publicly observed S85

Margin sits in three places. Recurring software subscriptions carry the highest gross margin but the lowest ticket: Fedena sells an unlimited-user school licence for USD 999 a year and Campus 365 for ₹5,999 a month. ● Publicly observed S64 S76
Hardware installation carries a one-time margin and a service tail: a 16-camera school CCTV fit-out costs ₹75,000 to ₹1,40,000 installed, and a school-bus GPS device ₹4,000 to ₹20,000 per bus plus ₹150 to ₹8,000 a month depending on tier. ● Publicly observed S79 S81 S89
Data and integration is the third pool, where a vendor that already holds the fee ledger and parent identities can attach attendance and transport at low marginal cost; this is the position Entab, Vidyalaya and MyClassboard occupy through their parent apps. ● Publicly observed S62 S74 ● Inferred

Rax today designs and manufactures electronics and writes software in Chennai, sells through two salespeople and inbound IndiaMART leads, and has no school installer or dealer network; its e-surveillance business reaches banks only through integrators such as SIS and Securens. ● Rax-supplied S7 It could occupy the software-plus-device layer for schools only by borrowing the local installation layer from CCTV dealers or by building it, which its ATM-segment service record makes the central risk. ● Rax-supplied S7 ● Inferred

How buyers describe and search for the category

Buyers and tenders use "school management software", "school ERP", "student information system", "school app" or "parent app", "fee management software", "biometric attendance", "face attendance", "school bus GPS tracking" or "vehicle tracking", and "CCTV surveillance system". ● Publicly observed S52 S60 S79 S92 Government tenders on GeM use catalogue names such as "Camera for CCTV System (V3)" and "Video Recorder for CCTV System (V2)" and are raised school by school. ● Verified S51
Hardware is specified by standard rather than brand: IS 13252 (Part 1) and the security Essential Requirements (ER-01) for cameras, AIS-140 for bus trackers, and, in state IT tenders, CMMI level 3 for the software house. ● Verified S122 S25 S167 No buyer language for "smart campus IoT" or "energy and water monitoring for schools" surfaced in any listing, tender aggregator or review site opened; that vocabulary is Rax's, not the market's. ● Inferred

Market structure

Software is fragmented and domestic: Entab (₹40.74 crore revenue, FY2025), Vidyalaya, MyClassboard, Skolaro, Schoolpad, Edunext, Campus 365, Chennai Campus and dozens of regional vendors sell to 1,000 to 2,000 schools each; the venture-funded layer (Teachmint USD 118 million raised, LEAD ₹351 crore revenue with 8,000 schools, Uolo 2,500 schools, Next Education claiming 18,000 schools) bundles ERP with content. ● Publicly observed S63 S66 S69 S70 S77 Global players are marginal in K-12 India: Fedena is Indian, Classter and PowerSchool sell to international schools, and Frappe Education is open source. ● Publicly observed S64 S95 S96
Hardware is import-dependent and concentrated: Chinese-origin camera brands dominate through Indian distributors, and the 2024 to 2026 Essential Requirements regime is consolidating the camera market around BIS-registered, STQC-tested models. ● Verified S122 S123 ● Publicly observed S124

Price tiers are visible in the listings: budget ERPs at ₹5,000 to ₹40,000 a year per school, mid-tier per-student pricing of ₹100 to ₹500 a year, and enterprise chains on negotiated contracts; bus tracking from ₹30 per student a month to ₹8,000 per bus a month; CCTV from ₹30,000 to ₹1.4 lakh per campus. ● Publicly observed S80 S81 S89 S92 S93

History: ten years of inflection points

The commercial category dates from the mid-2000s, when even the largest chains ran manually: Sri Chaitanya managed 70 institutions on paper until 2007. ● Publicly observed S108 Four forces shaped the last decade. Safety incidents produced regulation: the 2017 Ryan International death produced the CBSE safety circular and CCTV expectation, Badlapur in 2024

produced Maharashtra's CCTV order, and CBSE's July 2025 amendment made audio-visual CCTV with 15-day retention a condition of affiliation for 33,000-plus schools. ● Verified S20 S23 S44 S53 Bus safety moved from court guidelines (1997) to a device standard (AIS-140, 2016 to 2019) that states enforce at fitness inspection. ● Verified S25 S26 S125 The pandemic pushed fee collection and parent communication online and left schools with several apps; the venture money that followed (Teachmint, LEAD, Uolo) has since retreated to school-facing SaaS. ● Publicly observed S66 S69 S77 ● Inferred Finally, the state moved into the category as a supplier: NIC's Shaala Darpan for KVs (2015), Kerala's mandatory Sampoorana, Andhra Pradesh's face-recognition attendance for 1.67 lakh teachers (2022) and Aadhaar-based attendance in Tamil Nadu, which fences most of the government market off from commercial vendors. ● Verified S46 S47 S48 S49

SO WHAT FOR RAX

Rax should define its market as the top 15% of private unaided schools by size plus school groups, not "India's 1.47 million schools"; the government market is either free-platform or GeM hardware bids, and neither is a software sale.

● Recommendation

Table 3.5: Number of schools by management and school category, 2024-25: Private Unaided Recognized

India/State /UT	Number of Schools – Private Unaided Recognized										
	Total	Primary	Upper Primary		Secondary				Higher Secondary		
		(1 to 5)	(1-8)	(6-8)	(1-10)	(6-10)	(9-10)	(1-12)	(6-12)	(9-12)	(11-12)
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)
India	339583	77148	112756	15160	45861	10442	6528	45779	8440	6964	10505
Andaman and Nicobar Islands	71	25	25	0	8	0	0	13	0	0	0
Andhra Pradesh	15473	3526	4087	9	2109	3504	0	97	7	0	2134
Arunachal Pradesh	571	133	315	0	89	0	0	33	0	1	0
Assam	6480	521	1587	107	2637	32	117	1067	48	105	259
Bihar	11274	389	8761	5	405	44	359	858	11	104	338
Chandigarh	82	8	15	0	11	0	0	47	1	0	0
Chhattisgarh	7382	1337	3335	74	764	11	20	1687	43	110	1
Dadra and Nagar Haveli and Daman and Diu	63	17	14	0	14	0	0	18	0	0	0
Delhi	2637	965	754	5	209	3	0	692	7	2	0
Goa	141	99	6	0	15	4	0	10	0	0	7
Gujarat	13190	1022	5924	289	841	20	617	2340	71	1523	543
Haryana	8499	686	2270	4	1757	23	0	3697	58	3	1
Himachal Pradesh	2603	445	641	0	811	0	0	683	6	10	7
Jammu and Kashmir	5359	1572	1893	0	1423	1	1	453	4	10	2
Jharkhand	1707	6	199	2	414	305	92	430	9	2	248
Karnataka	19105	2254	5621	76	6150	81	1565	721	10	80	2547
Kerala	3018	356	517	15	1026	20	18	964	38	25	39
Ladakh	111	21	56	0	26	1	0	7	0	0	0
Lakshadweep	0	0	0	0	0	0	0	0	0	0	0
Madhya Pradesh	28212	1755	17634	22	3173	23	71	5201	94	233	6
Maharashtra	18746	3858	4145	77	3418	1582	663	2863	350	160	1630
Manipur	1030	42	281	7	497	4	6	121	5	5	62
Meghalaya	2135	941	216	107	185	30	448	46	6	35	121
Mizoram	1068	162	433	71	27	3	232	3	0	6	131
Nagaland	814	161	176	0	326	0	0	151	0	0	0
Odisha	6107	758	3287	64	529	165	119	256	3	0	926
Puducherry	311	64	22	0	98	0	0	125	0	0	2
Punjab	7589	589	1911	2	2135	7	2	2738	18	53	134
Rajasthan	33548	2534	15388	7	6607	41	7	8715	185	62	2
Sikkim	372	190	138	0	22	0	0	22	0	0	0
Tamil Nadu	11890	4921	707	7	1690	120	1	4189	239	3	13
Telangana	12474	528	4351	0	5949	189	0	136	1	0	1320
Tripura	485	185	145	0	75	1	0	79	0	0	0
Uttar Pradesh	104508	41117	24374	13574	1759	4109	2159	5953	7060	4388	15
Uttarakhand	5352	1292	2592	139	307	39	31	792	109	44	7
West Bengal	7176	4669	936	497	355	80	0	572	57	0	10

Source: UDISE+ 2024-25

Value chain for school administration software and campus safety in India

- 1 **Components and platforms**

Camera OEMs (Hikvision, CP Plus), AIS-140 device makers on the ARAI list, biometric terminals, payment gateways, cloud hosts

Import-heavy for cameras; ER-01 and STQC now filter what can be sold
- 2 **Design and software**

ERP SaaS vendors (Entab, Fedena, Vidyalaya, MyClassboard); Rax Tech

High gross margin, low ticket; white-label programmes common
- 3 **Integration and installation**

Local CCTV and low-voltage dealers, telematics vendors, biometric dealers

One-time margin plus AMC; the layer Rax lacks
- 4 **School operations**

Correspondent, principal, office, transport in-charge, IT coordinator

Buy after an incident, inspection or affiliation deadline
- 5 **Parents and regulators**

Parents on the app; CBSE, RTO, state department, Data Protection Board

The app rating and the inspection are the service model

Margin concentrates in recurring software and in local installation and AMC; Rax holds design and software and lacks the installation layer that dealers and telematics vendors own. Inferred S29 S64 S85 S89

03 Market growth, demand drivers and regulation

KEY TAKEAWAYS

- Demand is regulation-led, not technology-led: CBSE clause 4.7.10 (CCTV, July 2025), AIS-140 bus tracking (in force since 2019), state bus directives and the DPDP Rules (children's data, 2027) each create a budgeted, dated obligation. Verified S20 S26 S31 S33
- The private school base grows about 0.6% a year in count and faster in enrolment share (31% to 40% in four years); the government base shrinks. Verified S13 S17
- Scheme money is large but pays for government schools and hardware on GeM: Samagra Shiksha ₹42,100 crore and PM SHRI ₹7,500 crore in 2026-27; Tamil Nadu's allocation is falling and ₹3,440 crore is withheld. Verified S128 S130
- Counter-drivers are real: 58.0% of schools had 100 students or fewer in 2025-26, fee-regulation acts cap what private schools can pass on, and teachers have already forced one state to suspend app attendance. Verified S13 S57 S58
- The technology shift that matters is CCTV becoming a regulated network device (ER-01, STQC) and face attendance moving from terminals to cameras and phones. Verified S122 Publicly observed S84

Market growth

The best primary series for this category is the count and enrolment of private unaided schools, because they are the fee-paying buyers. Private unaided recognised schools numbered 3,35,844 in 2021-22, 3,23,430 in 2022-23, 3,31,108 in 2023-24, 3,39,583 in 2024-25 and 3,41,689 in 2025-26; government schools fell from 10,22,386 to 10,05,245 over the same years.

Verified S12 S13 S16 Pass 2 re-checked the 2025-26 figures in the primary booklet: 3,41,689 private unaided schools, 9,88,63,908 students out of 24,72,19,766, which is 40.0%. Verified S13 Private unaided enrolment (I to XII) rose from 8.09 crore in 2023-24 to 8.57 crore in 2024-25, and on the pre-primary-to-secondary basis from 9.59 crore in 2024-25 to 9.89 crore in 2025-26; the share of all enrolment went from 31.1% (2021-22) to 40.0% (2025-26). Verified S12 S13 S17 S18 The 2022-23 dip in counts reflects the switch to student-wise data collection and rationalisation, not closures alone.

Verified S16 The outlook in the growth chart extends the latest rates to 2031-32: private unaided schools grow at about 0.6% a year (CAGR 2025-26 to 2031-32) to about 3,54,000, government schools fall about 0.8% a year to about 9,58,000, and the enrolment share keeps moving faster than the counts. Estimated S13 For sizing, the paying base is modelled at 6% a year in value: about 3% from share gains and 3% from price. Estimated S13 S17

Analyst figures for the software category are unreliable and should only triangulate. Grand View states India's education ERP market at USD 0.8 million in 2024, which is smaller than Entab's audited revenue alone; The Business Research Company puts the global school management system market at USD 22.3 billion in 2025 growing 13.4% a year; Data Bridge's 17.1% global CAGR is the number the investor deck quotes; 6Wresearch shows India education ERP growth of 7 to 10% a year since 2022.

Publicly observed S99 S100 S102 S116 None of these publishes an India K-12 school-ERP revenue figure with a stated method, so the sizing in section 04 is built bottom-up. Inferred

40.0%

Share of Indian school enrolment in private unaided schools in 2025-26, up from 31.1% in 2021-22; the paying buyer base is growing while the system shrinks. Verified S17

Regulation and mandates that create demand

INSTRUMENT	ISSUING BODY AND DATE	WHAT IT REQUIRES	ENFORCEMENT REALITY	LABEL
Affiliation Bye-Laws clause 4.7.10	CBSE, notification 21 July 2025	High-resolution CCTV with real-time audio-visual recording at gates, classrooms, corridors, stairs, labs, libraries, canteens, playgrounds, stores; 15-day retention; footage on request	Condition of affiliation for 33,151 schools; inspected at affiliation and extension; no public penalty record yet	Verified: S153, S53

INSTRUMENT	ISSUING BODY AND DATE	WHAT IT REQUIRES	ENFORCEMENT REALITY	LABEL
CBSE safety circular and clause 4.7.6	CBSE, September 2017; bye-laws	CCTV, police verification, psychometric evaluation, security audit reported online in two months; NDMA School Safety Policy 2016	Compliance self-reported on the CBSE portal	Verified: S21, S22, S23
CMVR rule 125H, G.S.R. 1095(E) and AIS-140	MoRTH, 28 November 2016; in force for new PSVs from 1 January 2019	VLT device with emergency button, ARAI type-approved, reporting to a state command centre	Enforced at registration and fitness by RTOs; existing-vehicle deadlines set by states; many states still building command centres	Verified: S25, S26, S27, S28
M.C. Mehta school-bus directions	Supreme Court, 1997; adopted by states	Yellow bus, 40 km/h with speed governor, attendant, first aid, extinguishers, driver experience	Written into permit conditions; inspected at fitness	Verified: S125, S126
Tamil Nadu school-bus rules and 2024 directive	TN Special Rules 2012; Transport Department, April 2024, on Madras HC orders	Permit under section 76; GPS and CCTV fitted; female helpers; drivers with 10 years' experience; details uploaded	Annual fitness before the June reopening; periodic inspections	Verified: S30, S31, S127
Maharashtra CCTV directive and GR	State, August 2024 and 13 May 2025	CCTV at classroom entrances, corridors, gates, playgrounds	Directive gave one month; GR follows a High Court committee	Verified: S44, S45
DPDP Act section 9 and Rules 2025	Parliament, August 2023; MeitY, 13 November 2025	Verifiable parental consent; no tracking or behavioural monitoring of children, except schools and school-transport providers for educational activities and safety	Child-data rules commence 13 May 2027; penalties up to ₹250 crore per contravention	Verified: S32, S33, S35
CCTV Essential Requirements ER-01	MeitY gazette 9 April 2024; BIS guidelines 22 October 2024; MeitY OM 16 January 2026	IP cameras under compulsory registration must pass security testing (STQC or CERT-In lab); non-compliant models delisted after 9 April 2025; the stock-clearance relaxation ended on 1 April 2026; analog cameras are outside the ER regime	Enforced through BIS licences, customs and tender clauses (Gujarat's CCTV rate contract demands the test report)	Verified: S122, S158, S159, S168
Guidelines on School Safety and Security 2021	Ministry of Education, 1 October 2021; enforcement direction to states, August 2024	Accountability of school management, principals and teachers in private unaided schools for safety on campus and in school transport; state notification under RTE section 35(2); fines proportionate to a private school's revenue	Advisory until a state notifies it; MoE asked states for implementation status in 2024	Verified: S156; Publicly observed: S157
APAAR ID and UDISE+ student data	CBSE circulars of 24 January 2025 and 15 September 2025; Ministry of Education	Parental consent forms, Aadhaar-verified student data on UDISE+, APAAR IDs on ID cards and school IT; APAAR ID mandatory for Class IX and XI registration from 2025-26	Enforced at CBSE registration; the Minister told the Rajya Sabha enrolment is voluntary and consent based	Verified: S154, S155, S170
NCPCR manual	NCPCR, September 2021	Consolidated safety norms including CCTV monitoring and maintenance	Referenced by CBSE's 2025 amendment	Verified: S20, S24
NEP 2020 para 23.5	Ministry of Education, July 2020	Technology for administration including admissions, attendance and assessments	Policy, not mandate; drives state platforms	Verified: S131

The DPDP exemption cuts both ways. Fourth Schedule Part A lets an educational institution track and monitor children without parental consent "in the interests of safety of children enrolled", and lets a transport provider track location during travel; this legalises face attendance and bus tracking for schools, but a vendor processing the data for the school remains bound by security and breach duties, and the "DPDP-ready" claim only means something once the May 2027 rules are live and the vendor has a documented data map. ● Verified S33 ● Inferred

Government schemes and budgets

Samagra Shiksha, the integrated school scheme, has a 2026-27 budget of ₹42,100 crore against a revised ₹38,000 crore for 2025-26 and actual spending of ₹35,001.58 crore in 2024-25, figures re-verified in pass 2 against the Union Budget's notes on demands (a news report had given ₹36,288 crore); spending in 2023-24 was ₹32,830 crore and PRS notes 86% average utilisation. ● Verified S160 ● Publicly observed S128 ● Verified S132 Its ICT component pays government and aided schools (classes VI to XII) up to ₹6.40 lakh for an ICT lab plus ₹2.40 lakh a year for five years, and ₹2.40 lakh plus ₹0.38 lakh a year for

two smart classrooms; 1,20,614 ICT labs and 82,120 smart classrooms had been sanctioned by January 2025 and 1,46,040 smart classrooms by July 2025, and all ICT procurement must go through GeM. ● Verified S36 S37 None of these line items names an ERP, attendance system, CCTV or bus tracker; a vendor can only reach this money as a GeM goods supplier of computing hardware, which is not ZenCampus. ● Verified S36 ● Inferred

PM SHRI funds 14,500 model government schools with ₹27,360 crore over 2022-23 to 2026-27, about ₹2 crore per school, with a 2026-27 budget of ₹7,500 crore; the same ₹7,500 crore budgeted for 2025-26 was revised to ₹4,500 crore, and actual spending was ₹3,504.30 crore in 2024-25 and only ₹1,215 crore in 2023-24. ● Publicly observed S38 ● Verified S160 S129 Tamil Nadu has not joined, its Samagra allocation fell from ₹2,733 crore to ₹2,469 crore, and ₹3,440 crore is withheld in the dispute, so the home-state government segment is the least funded in the country for the next budget cycle. ● Verified S130 Disbursement lags are documented: Punjab used only a third of its digital-infrastructure funds, and 11.3% of Samagra's 2023-24 revised estimate went unspent nationally. ● Verified S39 S129

State CCTV programmes are the only scheme money that buys what ZenCampus sells, and they buy cameras, not software: Delhi's ₹597.51 crore for 1.46 lakh classroom cameras in 1,028 buildings (2018, with five-year maintenance and parent live feed), Tamil Nadu's ₹21 crore for 2,800 government high schools and a 4,200-school programme revived in 2024, and Karnataka's ₹10 crore for 3,333 schools. ● Verified S40 S42 S43 The implied budgets, roughly ₹40,000 per camera all-in in Delhi and ₹30,000 to ₹75,000 per school in the southern states, define the price ceiling for any government campus-safety bid. ● Estimated S40 S42 S43

Incidents, litigation and audits

Every major mandate above followed a death: Kumbakonam (2004, 93 children) produced the Supreme Court's building-safety condition; Ryan International (2017) produced the CBSE CCTV circular; Badlapur (2024) produced Maharashtra's order; Madras High Court's 2019 direction on bus CCTV and GPS came from a public-interest petition after bus deaths in Chennai. ● Verified S23 S24 S30 S44 Buyers therefore purchase after an incident or an inspection notice, in a rush and with a compliance checklist, which favours the vendor already on site (the CCTV dealer) over a new platform. ● Inferred

Technology shifts

Three shifts change what buyers expect. CCTV cameras became regulated network devices in 2024 to 2026, which removes grey-market cameras from tenders and rewards vendors with BIS-registered, STQC-tested models. ● Verified S122 S123 Face attendance moved from wall terminals (₹20,500 for a Realtime T501) to phone and tablet software (Truein from ₹290 per user a year) and to state-run apps (Andhra Pradesh for 1.67 lakh teachers, Tamil Nadu's AadhaarFACERD). ● Publicly observed S84 S87 ● Verified S46 S47 Bus tracking converged on AIS-140 devices with parent apps layered on top, and vendors now give hardware free against subscription (NeoTrack) or charge software per school rather than per bus (ProSchool360 at ₹1,000 a month). ● Publicly observed S79 S81 Internet in schools rose from 33.9% (2021-22) to 63.5% (2024-25), and 96.4% of Tamil Nadu's private unaided schools are online, so cloud delivery is no longer the constraint in the target segment. ● Verified S12 S16

Macro and sector indicators

Teachers crossed one crore in 2024-25 (1,02,73,020 in 2025-26), 39.1% of them in private unaided schools, so staff attendance and payroll is a 40-lakh-user problem in the private sector alone. ● Verified S13 S14 S16 Fees in reputable private schools run ₹1 to ₹4 lakh a year in tier 1 and 2 cities and ₹50,000 to ₹2 lakh in tier 3 and 4, against which a ₹100 to ₹500 per-student software line is invisible, while budget private schools charging under ₹1,000 a month cannot absorb it. ● Publicly observed S58 ● Inferred Kendriya Vidyalayas (1,286 schools, 13.7 lakh students) and Navodayas (665 schools, 3.2 lakh students) run on NIC and C-DAC systems and buy CCTV on GeM per school. ● Verified S13 S49 S51

Timing windows

Private schools buy software between the March results and the June reopening, when fee structures are set and parent apps are re-issued; CBSE affiliation extensions and inspections run on the school's affiliation cycle; school-bus fitness certificates fall due before reopening, which is when the April 2024 Tamil Nadu directive was issued. ● Verified S31 ● Inferred The CBSE CCTV clause has no published compliance date, so the practical deadline is each school's next inspection; the DPDP child-data rules give a hard date of 13 May 2027; the CCTV stock relaxation ended on 1 April 2026. ● Verified S20 S33 S123 Samagra's annual PAB approvals are set in the first quarter of each financial year and PM SHRI ends in 2026-27. ● Verified S36 ● Publicly observed S38

Counter-drivers

Small schools dominate by count (58.0% with 100 students or fewer in 2025-26), fee-regulation acts in Tamil Nadu, Gujarat, Punjab, UP and others cap increases and therefore technology pass-through, and Gujarat caps annual fees at ₹15,000 to ₹27,000. ● Verified S13 ● Publicly observed S58 Free government platforms remove the government and aided segments from the software market. ● Verified S47 S48 S49 Users push back when systems ignore their conditions: Uttar Pradesh suspended mandatory app attendance within eight days of launch in July 2024, and Bihar's teachers describe the e-Shikshakosh app as failing "more than 90% of the time". ● Verified S54 S57 Parent app fatigue is visible in 124,000 CampusCare reviews complaining about forced logins and monthly updates. ● Publicly observed S61 Finally, incumbency: the CCTV dealer and the ERP vendor are already inside the school, and switching costs in fee ledgers and parent logins are high. ● Inferred

SO WHAT FOR RAX

The dated obligations that will make a principal sign in the next 18 months are CBSE clause 4.7.10 and bus GPS at fitness time; ZenCampus should be sold as the compliance record for those two, with the ERP as the ledger behind them, rather than as a smart-campus vision. ● Recommendation

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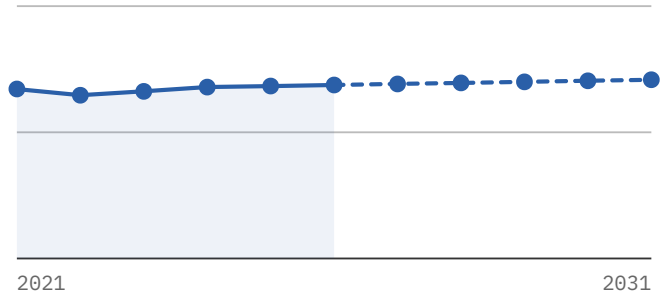
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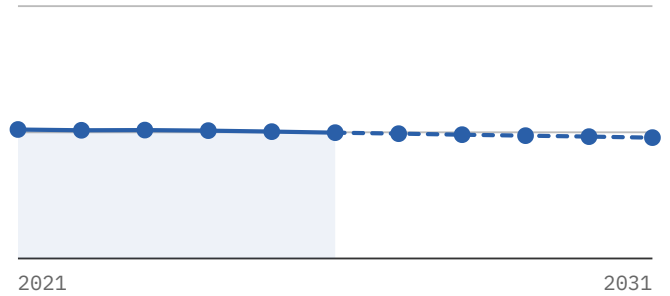
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The Ministry of Education's ICT@Samagra Shiksha page: ₹6.40 lakh ICT lab and ₹2.40 lakh smart-classroom grants, sanction counts, and the instruction that all ICT procurement goes through GeM. Source S36

Private unaided recognised schools 3,54,175 in 2031
3,35,844 in 2021 · +0.5% a year



Government schools 9,57,948 in 2031
10,22,386 in 2021 · -0.6% a year



Recognised schools in India by management, UDISE+, 2021-22 to 2025-26 with outlook. Each panel has its own scale. Dashed from 2026 is outlook. Year is the start of the academic year (2021 = 2021-22). Historical points are UDISE+ report totals (2025-26 re-verified against the primary booklet in pass 2); the 2022-23 dip reflects the move to student-wise data. Outlook to 2031 extends the 2024-25 to 2025-26 rates: private unaided +0.6% a year (CAGR 2025-26 to 2031-32 about 0.6%, to about 3,54,000 schools), government -0.8% a year (to about 9,58,000). Enrolment share moves faster than counts: private unaided schools enrolled 31.1% of children in 2021-22 and 40.0% (9.89 crore of 24.72 crore) in 2025-26.

1997-12-16	REGULATION	Supreme Court school-bus directions in M.C. Mehta v Union of India Origin of the golden-yellow bus, speed-governor, attendant and permit conditions later written into state school-bus rules
2004-07-16	INCIDENT	Kumbakonam school fire kills 93 children Leads to Avinash Mehrotra v Union of India (2009), which makes NBC safety compliance a condition of school recognition
2012	REGULATION	Tamil Nadu Motor Vehicles (Regulation and Control of School Buses) Special Rules Permit, structural and safety conditions for every school bus in Tamil Nadu
2015-06-05	MARKET	KV Shaala Darpan launched for all Kendriya Vidyalayas NIC-built school automation for 1,185 KVs; the central school systems stop being a commercial ERP market
2016-11-28	REGULATION	MoRTH notifies G.S.R. 1095(E): VLT device and emergency button for public service vehicles (CMVR 125H) AIS-140 tracking becomes the legal standard for school buses on permit; effective for new vehicles from 1 January 2019 after deferrals
2017-09-14	REGULATION	CBSE safety circular after the Ryan International, Gurugram death CCTV on premises, police verification and psychometric evaluation of staff, security audit reported online within two months
2018-05-15	SCHEME	Delhi approves 1.46 lakh classroom CCTV cameras for ₹597.51 crore Largest school-CCTV programme in India; includes five-year maintenance, leased lines and a parent live-feed app; still being announced as imminent in 2022
2018-10-18	REGULATION	CBSE Affiliation Bye-Laws 2018 take effect Chapter 4 infrastructure and safety clauses that the 2025 CCTV amendment extends
2019-07-26	REGULATION	Madras High Court orders CCTV and GPS in all Tamil Nadu school buses Basis of the Transport Department's April 2024 directive on GPS, CCTV and female helpers
2020-07-29	REGULATION	National Education Policy 2020 approved Para 23.5 names technology for administration including admissions, attendance and assessments
2021-09-08	REGULATION	NCPCR Manual on Safety and Security of Children in Schools Consolidates court, MoRTH, CBSE, KVS and NVS safety instructions; clause on monitoring and maintaining CCTV
2021-10-01	REGULATION	Ministry of Education issues Guidelines on School Safety and Security Fixes accountability of school managements, including private schools and school transport, after Supreme Court petitions; MoE told states to enforce them in August 2024

2022-09-07	SCHEME	PM SHRI approved: 14,500 schools, ₹27,360 crore to 2026-27 Model-school upgrades including smart classrooms; Tamil Nadu has not signed and ₹3,440 crore is withheld in the dispute
2023-08-11	REGULATION	Digital Personal Data Protection Act 2023 enacted Section 9: verifiable parental consent; no tracking or behavioural monitoring of children
2024-04-09	REGULATION	MeitY notifies Essential Requirements for Security of CCTV (ER-01) Mandatory for BIS-registered cameras from 9 April 2025; stock relaxation withdrawn from 1 April 2026
2024-07-08	INCIDENT	Uttar Pradesh teachers revolt against app-based digital attendance; order suspended 16 July The clearest public signal that attendance technology fails when it ignores connectivity, timing and user burden
2024-08-22	INCIDENT	Badlapur assault: Maharashtra orders CCTV in all schools within a month Followed by a 23-page GR on 13 May 2025 after a Bombay High Court-appointed committee
2025-01-24	REGULATION	CBSE makes APAAR ID the primary student identifier Schools collect parental consent, generate IDs on UDISE+ and integrate them into their IT systems
2025-07-21	REGULATION	CBSE amends bye-laws: clause 4.7.10 mandates audio-visual CCTV with 15-day retention Applies to all 33,000-plus affiliated schools; toilets excluded; footage to be produced on request
2025-09-15	REGULATION	CBSE makes APAAR ID mandatory for Class IX and XI registration Registration data uploaded with the principal's Aadhaar e-signature after OASIS updates; refusals recorded
2025-09-22	RAX	Rax Tech ISO 9001:2015 certificate issued (scope includes software and edge video analytics) First certification cycle, valid to 21 September 2028
2025-11-13	REGULATION	DPDP Rules 2025 notified (G.S.R. 846(E)) Child-data rules commence 13 May 2027; schools exempt from consent for safety tracking under the Fourth Schedule
2025-12-11	INCIDENT	Maharashtra assembly told CCTV is fitted in 29,049 private and 60,049 local body schools Minister's reply after the Badlapur case and the May 2025 GR; opposition questioned the pace
2026-01-16	REGULATION	MeitY withdraws the stock-clearance relaxation for non-ER CCTV cameras from 1 April 2026 Office Memorandum W-18/26/2025-IPHW; analog cameras remain outside the security ERs
2026-02-01	SCHEME	Union Budget 2026-27: Samagra Shiksha ₹42,100 crore, PM SHRI ₹7,500 crore Department of School Education and Literacy ₹83,562 crore, its highest allocation

- 2026-03-22 MARKET
Assam seeks a CMMI level 3 agency for Shiksha Setu 2.0 with facial-recognition attendance
World Bank-funded state governance platform; state school software goes to large IT firms, not ERP vendors
- 2026-07-07 MARKET
UDISE+ 2025-26 released: private unaided schools enrol 40% of children
9.89 crore students in 3,41,689 private unaided schools; government enrolment down 86 lakh in two years
- 2026-07-11 RAX
Rax publishes ZenCampus sales, government and investor decks
Audited traction: 0 users on the AI product, 300 active users on the legacy product
- 2026-09-15 RAX
Rax confirms no sales of the current ZenCampus product
Statement recorded in CONTEXT-RAX; consistent with the deck audit (0 AI users, 300 legacy Smart School Campus users)

Regulation, schemes, incidents and market events that shape demand, in date order.

04 Market sizing

KEY TAKEAWAYS

- Bottom-up TAM of about ₹2,670 crore a year (2026) for India's private unaided schools across ERP and apps (₹1,187 crore), bus tracking (₹918 crore) and CCTV refresh and AMC (₹564 crore). Estimated S12 S13 S64 S81 S89
- Serviceable market of ₹184 crore a year: 4,866 private schools above 500 students in Tamil Nadu, Karnataka, Telangana, Andhra Pradesh and Puducherry (UDISE+ 2025-26) at ₹3.78 lakh per school. Estimated S13 S64 S81 S89
- Obtainable by 2031: about ₹6 crore from 150 campuses, capacity-constrained by two salespeople and the absence of a reference; the range is ₹1.5 to ₹12 crore. Estimated S6 S60
- Today's paid spend is far below potential: current ERP spend is perhaps ₹255 crore against a ₹1,187 crore potential, so the market is under-penetrated, which cuts both ways. Estimated S63
- Analyst numbers for this category are unusable (USD 0.8 million to USD 22 billion); the sizing rests on UDISE+ counts and observed prices. Publicly observed S99 S100

Bottom-up TAM

The addressable unit is the private unaided school, because government and aided schools receive software from the state and buy hardware through schemes on GeM. Verified S36 S48 S49 The arithmetic uses UDISE+ counts and the observed prices in section 07.

COMPONENT	UNITS	PENETRATION OR BASIS	PRICE	ANNUAL VALUE (₹ CRORE)	LABEL
ERP, parent app, attendance	9.89 crore students in 3,41,689 private unaided schools (2025-26)	All students (potential)	₹120 per student per year (between Fedena's ₹85 at 1,000 students and e-School ERP's ₹130 to ₹180)	1,187	Verified: S13; Publicly observed: S64, S93
Bus tracking	85,000 private schools above 300 students (25% of private unaided; national all-management share above 300 is 14%, and private schools average 289 students against 118 for government)	60% run buses, six buses each: 3.06 lakh buses	₹2,500 per bus per month blended (₹225 SIM-only to ₹6,500 premium)	918	Estimated: S12, S17, S79, S81
CCTV refresh and AMC	1.88 lakh private schools above 100 students	₹1.07 lakh estate every five years plus 8% AMC	₹30,000 per school per year	564	Estimated: S12, S89
Total TAM 2026				2,670	Estimated

Two of the three factors are weak. The private-school size distribution is not published in UDISE+ (Table 2.3 is all managements), so the 25% and 55% shares are inferred from the higher private average size; and the bus count per school is an assumption, since no national count of school buses was found. Verified S12 Unknown The ERP line is the most solid because both units and prices are observed.

Top-down triangulation

Entab's audited revenue of ₹40.74 crore across a claimed 1,200-plus schools implies about ₹3.4 lakh per school per year, consistent with per-student pricing on 700-student CBSE schools. Publicly observed S60 S63 Estimated S63 If 15% of the 85,000 private schools above 300 students pay for an ERP at an average ₹2 lakh, current paid ERP spend is about ₹255 crore, roughly a fifth of the ₹1,187 crore software potential; the venture-backed bundlers (LEAD ₹351 crore, of which platform services ₹75 crore) sit largely outside the ERP line. Publicly observed S69 Estimated S63 Analyst figures do not help: Grand View's India education ERP market of USD 0.8 million (2024) is smaller than Entab alone, The Business Research Company's global school management system market is USD 22.3 billion, and IBEF's ₹1.1 lakh crore EdTech figure is mostly consumer learning. Publicly observed S99 S100 S101 The gap between potential and paid spend says the category is early, which means both that room exists and that schools have been able to do without.

Evidence on current adoption

No primary survey measures what share of Indian private schools already run an ERP, bus tracking or CCTV, so penetration is triangulated from partial evidence. Unknown CCTV is the best documented and is already mainstream in private schools: in Maharashtra only 47% of 44,380 private aided and unaided schools had cameras in 2022, half of all 1,08,082 schools had them in March 2025, and by December 2025 the minister reported CCTV in 29,049 private and 60,049 local body schools. Publicly observed S164 S165 S166 The CCTV line in the TAM is therefore mostly refresh, audio upgrade and AMC on an existing estate, not first installation. Inferred For school ERP the only national figures are vendor claims of "fewer than 8%" or "fewer than 15%" of all 14.9 lakh schools using any digital management tool, citing no verifiable source; they are not used. Publicly observed S179 For buses, district inspections give a floor: Kallakurichi's 80 bus-running schools had four buses each and Thanjavur district inspected 1,163 institutional vehicles in May 2026. Publicly observed S162 S163 Entab's own history supports the per-school value: 900 schools and ₹35 crore in FY20, about ₹3.9 lakh a school, against ₹3.4 lakh on 1,200 schools in FY2025. Publicly observed S63 S178

₹184 crore

Annual serviceable market for ZenCampus in 2026: 4,866 private schools above 500 students in five southern states at ₹3.78 lakh each; everything Rax can reach with a Chennai service radius in 36 months. Estimated S13 S64 S81 S89

SAM

Serviceable schools are private unaided schools above 500 students in Tamil Nadu, Karnataka, Telangana, Andhra Pradesh and Puducherry. Pass 2 rebuilt the count on the UDISE+ 2025-26 booklet, the same year as the TAM, using each state's private unaided count and its share of schools above 500 students (Table 2.3 covers all managements, so the share understates private schools, which are larger). Verified S13 Estimated S13

STATE	PRIVATE UNAIDED SCHOOLS, 2025-26	SHARE OF SCHOOLS ABOVE 500 STUDENTS	SERVICEABLE SCHOOLS	LABEL
Tamil Nadu	11,683	11.5%	1,344	Verified: S13; Estimated
Karnataka	19,351	6.2%	1,200	Verified: S13; Estimated
Telangana	13,245	9.8%	1,298	Verified: S13; Estimated
Andhra Pradesh	15,710	6.2%	974	Verified: S13; Estimated
Puducherry	318	15.8%	50	Verified: S13; Estimated
Total	60,307		4,866	Estimated: S13

Each is worth ₹1.08 lakh of software (900 students at ₹120), ₹2.4 lakh of transport (eight buses at ₹2,500 a month) and ₹30,000 of CCTV refresh and AMC, or ₹3.78 lakh a year, giving ₹184 crore; the first pass, on 2024-25 counts, gave 4,659 schools and ₹176 crore. Estimated S12 S13 S64 S81 S89 Tamil Nadu and Puducherry alone are 1,394 schools and ₹53 crore. Estimated S13 The transport assumption survives a check against the fleet: Tamil Nadu permits 32,389 school buses and vans, so eight buses at each of its 1,344 large private schools would be about a third of the state fleet. Publicly observed S161 Estimated S13 S161

SOM and the five-year series

YEAR	TAM (₹ CRORE)	SAM (₹ CRORE)	SOM (₹ CRORE)	ASSUMPTION BEHIND SOM	LABEL
2026	2,670	184	0.2	Three pilots at Fedena-parity software	Estimated
2027	2,830	195	1.0	Pilots convert; legacy base partly upgraded; 25 campuses	Estimated
2028	3,000	207	2.2	Two dealers active; 55 campuses	Estimated
2029	3,180	219	3.6	One group of 15 campuses; 90 campuses	Estimated
2030	3,370	232	4.8	120 campuses	Estimated
2031	3,570	246	6.0	150 campuses at ₹4 lakh average	Estimated

TAM and SAM grow 6% a year: about 3% from private enrolment share gains (1.2 points a year on a 40% base) and about 3% price drift; SOM is a capacity curve, not a share curve, because 150 campuses in five years is what a two-person team plus dealers can install and service, against Entab's 1,200 schools after 25 years. ● Verified S17 ● Publicly observed S60

● Estimated S6 S7

Sensitivity

DRIVER	LOW	BASE	HIGH	NOTE	LABEL
Software price per student (₹80 / ₹120 / ₹200)	₹5.5 crore	₹6.0 crore	₹7.1 crore	Holding 150 campuses, the software line moves –₹0.36 lakh or + ₹0.72 lakh per campus; Fedena parity is ₹85, Entab-class ₹300-plus	Estimated: S64
Buses per campus on transport alerts (4 / 8 / 12)	₹4.2 crore	₹6.0 crore	₹7.8 crore	Transport is ₹1.2, ₹2.4 or ₹3.6 lakh of a ₹2.8, ₹4.0 or ₹5.2 lakh contract	Estimated: S81
Dealer channel (0 / 2 / 5 Chennai dealers)	₹2.4 crore	₹6.0 crore	₹10.0 crore	About 60 direct campuses without dealers; two dealers add about 45 campuses each; five add about 38 each as they compete	Estimated: S89
Reference and group win (none by 2028 / one group 2029 / group in 2027)	₹1.5 crore	₹6.0 crore	₹12.0 crore	Low is about 37 campuses (pilots and legacy only); high is a 30-campus group in 2027 plus dealers recruited on its name, about 300 campuses	Estimated: S109, S142

The sensitivities show where the money is: transport is 60% of a campus contract, so bus attach moves the outcome more than the software price, and the reference and dealer drivers move it more than either. Pricing software at Fedena parity costs Rax about ₹0.5 crore of 2031 revenue; failing to earn a reference costs it ₹4.5 crore. ● Estimated S64 S81 S89

Government versus private, India versus export

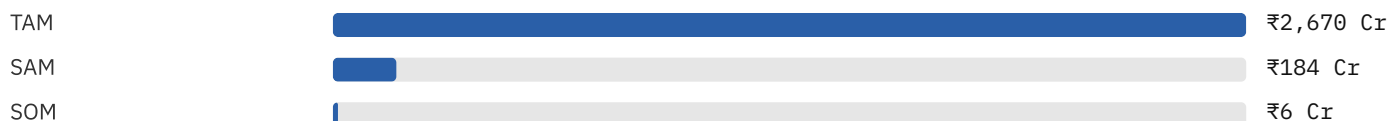
The TAM above is private demand only. Government demand is hardware programmes bought at fixed ceilings: Delhi's ₹597.51 crore (one-off, 2018), Tamil Nadu's ₹21 crore first phase and 4,200-school programme, Karnataka's ₹10 crore, plus per-school GeM bids by 1,951 KVs and NVs; a national annual figure could not be built because state programmes are episodic, and it is Unknown. ● Verified S40 S42 S43 S51 ● Unknown Export demand is sized in the Saudi dossier at SAR 660 million TAM and SAR 40.5 million SAM (about ₹90 crore) for Riyadh, Jeddah and Dammam campuses, on a per-campus assumption of SAR 90,000; Dubai's 227 schools are a further, unsized pool. ● Rax-supplied S11 ● Verified S104 Neither is added to the India figures.

What the sizing does not capture

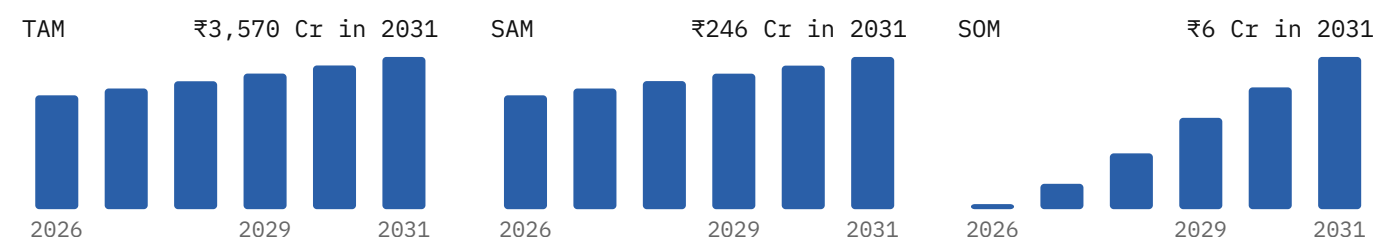
It excludes energy, water and environment telemetry, for which no school price point or buyer language was found; it excludes content and LMS bundles; it treats every private school above 300 students as a bus operator at a fixed fleet size; it uses all-management size shares as a proxy for private schools; and it assumes ₹120 per student when observed prices run from ₹42 (Fedena at 2,000 students) to ₹500. ● Publicly observed S64 ● Unknown The TAM should be read as ₹2,000 to ₹3,500 crore, the SAM as ₹130 to ₹260 crore, and the 2031 SOM as ₹1.5 to ₹12 crore. ● Estimated S12 S64 S81 S89

SO WHAT FOR RAX

The number that should drive the decision is not the ₹2,670 crore TAM but the ₹6 crore SOM: at that scale ZenCampus is a service business of 150 campuses, and the plan must be built around installing and supporting them, not around market share. ● Recommendation



Addressable, serviceable and obtainable market, 2026. Bars share one scale.



	VALUE	DEFINITION	ASSUMPTIONS
TAM	₹2,670 Cr	Annual spend potential of India's private unaided schools on administration software, bus tracking and campus CCTV, 2026 triangulated	9.89 crore students in 3,41,689 private unaided schools (UDISE+ 2025-26) at ₹120 per student per year for ERP, apps and attendance: ₹1,187 crore [S13, S64, S93] - About 85,000 private schools above 300 students (25% of private unaided schools; the all-management share above 300 is 14% and private schools average 289 students against 118 for government) [S12, S17] 60% of those schools run buses, average six buses, blended ₹2,500 per bus per month across SIM-only to premium tiers: 3.06 lakh buses, ₹918 crore [S79, S81] - Bus-count check: Tamil Nadu permits 32,389 school buses and vans for about 62 lakh private unaided students (2025-26); scaled to 9.89 crore private students this implies about 5 lakh school vehicles nationally, so the 3.06 lakh buses assumed is conservative; district inspections show four buses per bus-running school in rural Kallakurichi [S13, S161, S162] 1.88 lakh private schools above 100 students refresh a ₹1.07 lakh CCTV estate every five years and pay 8% AMC: ₹30,000 a year each, ₹564 crore [S89] - CCTV penetration check: Maharashtra reported CCTV in 29,049 private schools in December 2025 against 44,380 private aided and unaided schools counted in 2022 (about 65%), up from 47% in 2022; the refresh-and-AMC line therefore addresses an installed base that already exists in most private schools [S164, S166] - Government and aided schools excluded: software is state-provided and hardware is scheme-funded on GeM [S36, S48, S49] - Triangulation: Entab's ₹40.74 crore across about 1,200 schools implies ₹3.4 lakh per school a year (FY20: ₹35 crore across 900 schools, ₹3.9 lakh); if 15% of the 85,000 private schools above 300 students pay for an ERP at an average ₹2 lakh, current paid ERP spend is about ₹255 crore, roughly a fifth of the software potential; analyst figures for India range from an implausible USD 0.8 million (Grand View) to a global USD 22.3 billion (TBRC) and are not usable [S63, S99, S100]
			● Estimated S12 S13 S17 S64 S79 S81 S89 S93 S63 S99 S100 S161 S162 S164 S166 S178
SAM	₹184 Cr	Private unaided schools above 500 students in Tamil Nadu, Karnataka, Telangana, Andhra Pradesh and Puducherry, serviceable within 36 months bottom-up	4,866 schools: UDISE+ 2025-26 private unaided counts times each state's share of schools above 500 students (Table 2.3, all managements, a conservative proxy since private schools are larger): Tamil Nadu $11,683 \times 11.5\% = 1,344$; Karnataka $19,351 \times 6.2\% = 1,200$; Telangana $13,245 \times 9.8\% = 1,298$; Andhra Pradesh $15,710 \times 6.2\% = 974$; Puducherry $318 \times 15.8\% = 50$ [S13] - Average 900 students per school; ERP at ₹120 per student: ₹1.08 lakh a year [S64, S93] - Eight buses per school at ₹2,500 per bus per month: ₹2.4 lakh a year; Tamil Nadu permits 32,389 school buses and vans, so its 1,344 large schools at eight buses (10,750) would be a third of the state fleet [S81, S161] - CCTV refresh and AMC annualised at ₹30,000 [S89] ₹3.78 lakh per school per year times 4,866 schools = ₹184 crore (pass 1 used 2024-25 counts: 4,659 schools, ₹176 crore) - Grows 6% a year to ₹246 crore in 2031: about 3% from private enrolment share gains (1.2 points a year on a 40% base) and 3% price drift [S13, S17]
			● Estimated S13 S64 S81 S89 S93 S161

	VALUE	DEFINITION	ASSUMPTIONS
SOM	₹6 Cr	Obtainable by 2031 with two salespeople, two Chennai dealer partners and one group win: about 150 campuses bottom-up	- Legacy base conversion, three paid pilots in 2027, dealer channel from 2028, one multi-campus group by 2029 [S6, S7] 150 campuses at ₹4 lakh average annual contract (software, transport, CCTV AMC) - Entab reached 1,200 schools in 25 years; Chennai Campus and Vidyalaya-class vendors add tens of schools a year; capacity, not demand, is the constraint [S60, S133] 2026 value is three pilots at Fedena-parity software pricing - Capacity curve: 25 campuses in 2027, 55 in 2028, 90 in 2029, 120 in 2030, 150 in 2031, each at ₹4 lakh ● Estimated S6 S7 S60 S133

Sensitivity

DRIVER	LOW	BASE	HIGH	NOTE
Software price per student (₹80 / ₹120 / ₹200)	5.5	6	7.1	Holding 150 campuses: the software line of the ₹4 lakh contract moves by -₹0.36 lakh or + ₹0.72 lakh (900 students); Fedena parity is ₹85 at 1,000 students, Entab-class pricing ₹300-plus; SOM 2031 in ₹ crore
Buses per campus taking transport alerts (4 / 8 / 12)	4.2	6	7.8	Transport at ₹2,500 per bus per month is ₹1.2, ₹2.4 or ₹3.6 lakh of the contract; per-campus value ₹2.8, ₹4.0 or ₹5.2 lakh times 150 campuses
Dealer channel activation (0 / 2 / 5 Chennai CCTV dealers reselling)	2.4	6	10	About 60 direct campuses without dealers (₹2.4 crore); two dealers add about 45 campuses each by 2031; five dealers add about 38 each (250 campuses) because they compete for the same schools
First reference and group win (none by 2028 / one group by 2029 / group in 2027)	1.5	6	12	Low: about 37 campuses, legacy upgrades and pilots only, dealers do not sign without a reference; high: a 30-campus Velammal- or Vels-scale group in 2027 plus dealers recruited on its name, about 300 campuses

05 Segments and ideal customer

KEY TAKEAWAYS

- Ten segments scored; the top three are Tamil Nadu CBSE schools and groups (65), South Indian multi-campus groups (58) and Tamil Nadu matriculation schools with bus fleets (55). ● Estimated S12 S20 S31
- The ideal customer is a CBSE school of 800 to 3,000 students within 100 km of Chennai, with 5 to 30 buses, an ageing ERP or parent app, and an affiliation inspection or bus fitness date in the next twelve months. ● Inferred
- The legacy base of 300 Smart School Campus users is the cheapest first conversation, but they are not ZenCampus customers (no ZenCampus sale has been made) and nobody knows what a "user" is; Rax must supply the list. ● Rax-supplied S6 S183 ● Unknown
- Government segments score low because the software is free from the state and the hardware is an L1 GeM bid; they are hardware-only opportunities. ● Verified S47 S48 S49 S51
- Twenty-four named organisations are listed as research targets on public evidence; inclusion is not a relationship. ● Publicly observed S109 S141 S142 S148

Segment table

Scores use the charter's eight dimensions (demand 20, fit 20, ROI 15, readiness 15, access 10, differentiation 10, friction 5, margin 5); the full objects are in `data/segments.json` and render below.

RANK	SEGMENT	SIZE	BUYER AND BUDGET	PAIN	TOTAL	LABEL
1	Tamil Nadu CBSE private schools and groups, 500 to 3,000 students	About 1,344 private schools above 500 students (all boards, 2025-26), CBSE share Unknown; Chennai Sahodaya lists 300-plus CBSE schools	Correspondent; fee income of ₹50,000 to ₹1.7 lakh per student	Clause 4.7.10 CCTV, bus directive, DPDP, APAAR data, parent-app fatigue	65	Estimated: S13, S153, S31, S141, S148
2	South Indian multi-campus groups (5 to 30 campuses)	40 to 60 groups; Velammal above 1 lakh students, Vels 12 campuses, PSBB Millennium 11,000	Group CEO and IT head; central budget	Uniform compliance, group dashboards, one vendor for all campuses	58	Estimated: S109, S142, S143
3	Tamil Nadu matriculation and budget schools with bus fleets, 300 to 800 students	About 5,000 schools of 201 to 500 students	Owner; fee-capped under the 2009 Act	Annual bus fitness, GPS and CCTV on buses, fee collection	55	Estimated: S12, S31, S58
4	Legacy Smart School Campus users (not ZenCampus customers; no ZenCampus sale has been made)	300 active users, definition unknown	Whoever bought the licence	Old software, no app	55	Rax-supplied: S6, S183
5	Karnataka, Telangana and Andhra Pradesh private schools above 500 students	About 3,000 schools	Same committee; strong local vendors	Same mandates; incumbents entrenched	52	Estimated: S12, S74, S108
6	State education departments buying CCTV for government schools	TN 4,200 schools, Karnataka 3,333, Maharashtra all	Director of School Education; tender at ₹30,000 to ₹75,000 per school	Court and incident-driven CCTV	42	Verified: S42, S43, S44
7	International and IB or Cambridge schools in metros	Low hundreds	Head and board; ₹3 to 10 lakh a year	Enterprise security expectations	37	Inferred
8	GCC private schools through iibdaei and Gulf Connect	Dubai 227 schools; Saudi 7,337	Group COO; ministry approvals	Bus GPS and CCTV rules; NOOR and KHDA data	36	Rax-supplied: S11; Verified: S104, S105

RANK	SEGMENT	SIZE	BUYER AND BUDGET	PAIN	TOTAL	LABEL
9	Kendriya Vidyalayas and Navodayas	1,951 schools	Principal via GeM goods bids	CCTV and networking only	35	Verified: S13, S49, S51
10	Budget private schools under 300 students nationally	About 2.4 lakh schools	Owner; referral-driven	Paper and WhatsApp work well enough	35	Estimated: S12, S18

Scores by dimension and the reasoning behind them

RANK	SEGMENT	DEMAND /20	FIT /20	ROI /15	READINESS /15	ACCESS /10	DIFF. /10	FRICTION /5	MARGIN /5	TOTAL
1	Tamil Nadu CBSE schools and groups	16	13	10	6	7	6	3	4	65
2	South Indian multi-campus groups	14	12	10	5	5	6	2	4	58
3	Tamil Nadu matriculation schools with buses	13	11	9	5	6	5	3	3	55
4	Legacy Smart School Campus users	9	14	8	7	6	4	4	3	55
5	Karnataka, Telangana, Andhra Pradesh schools above 500	14	10	9	4	4	5	2	4	52
6	State departments buying school CCTV	12	9	7	4	3	4	1	2	42
7	International and IB schools in metros	10	6	7	3	3	3	1	4	37
8	GCC private schools via group entities	11	5	7	2	2	4	1	4	36
9	KVs and NVs	8	8	6	4	4	2	1	2	35
10	Budget private schools under 300 students	9	7	5	5	3	3	2	1	35

Reasoning, dimension by dimension. **Demand** is highest where a dated obligation and a fee budget meet: segment 1 carries clause 4.7.10, the Tamil Nadu bus directive, DPDP and CBSE's mandatory APAAR registration at once, while legacy users (9) and KVs (8) have weaker or hardware-only needs. ● Verified | S153 | S31 | S33 | S155 **Fit** is highest for the legacy users (14) because they already run Rax software and sit in Rax's service radius, and lowest for GCC (5) and international schools (6), which need Arabic, NOOR or enterprise security Rax does not have. ● Rax-supplied | S6 | S11 **ROI** is believable only where compliance or fee collection is at stake (10 for CBSE schools and groups); state and budget buyers see a cost, not a return. ● Inferred **Readiness** is low everywhere because no ZenCampus sale or reference exists; the legacy segment scores 7 only because it is a known upgrade path on software those users already run. ● Rax-supplied | S183 | S6 **Access** rewards Chennai proximity and associations (7 for segment 1 through Chennai Sahodaya) and penalises L1 tenders, GeM goods bids and export (2 to 4). ● Publicly observed | S148 ● Verified | S51 | S167 **Differentiation** is 6 at best: an integrated compliance record is a real gap in Chennai CBSE schools, but incumbents already integrate biometrics and GPS. ● Publicly observed | S133 | S81 **Friction** is 3 or 4 only where a school buys direct in the March to June window or is already a user; tenders and export score 1. ● Inferred **Margin** is 4 where recurring software plus AMC attach is likely and 1 to 2 where L1 pricing or fee caps squeeze it. ● Estimated | S89 ● Publicly observed | S58

The ideal customer profile

Firmographics: a CBSE-affiliated private unaided school or a group of them, 800 to 3,000 students on a campus, 5 to 30 buses, within 100 km of Medavakkam, fees of ₹50,000 to ₹1.7 lakh a year, online (96.4% of Tamil Nadu private schools are), and already paying for an ERP or parent app it complains about. Verified S12 Publicly observed S58 S141 Trigger events: a CBSE affiliation extension or inspection after the July 2025 amendment, the bus fitness renewal before the June reopening, a parent complaint or incident, an expiring ERP contract, or a new campus opening. Verified S20 S31 Inferred Current alternative: Entab, Vidyalaya, MyClassboard or Chennai Campus for ERP; a CCTV dealer for cameras; NeoTrack or a device vendor for buses; WhatsApp for everything else. Publicly observed S61 S78 S81 S133 Budget holder: the correspondent or trustee, with the principal as champion; decision timeline three to six months, decided between March and June. Inferred Willingness to pay: Chettinad Vidyashram's class 10 fee is ₹86,975 a year, so a ₹150 per-student technology line is 0.2% of fees; the school already buys buses, cameras and an ERP. Publicly observed S141 Estimated S141

Buying committee

The committee diagram in `data/diagrams.json` names six roles. The economic buyer is the correspondent, trustee or group CEO, who needs one price, a reference and the certificates an inspector will ask for; a school with three conflicting prices in front of it will not sign. Inferred Rax-supplied S3 The champion is the principal, whose test is fewer apps and less teacher time; the CBSE teacher-time claim in Rax's deck is the principal's language. Rax-supplied S3 The technical evaluator is the IT coordinator or group IT head, who asks about migration from the incumbent's fee ledger, APIs, hosting and a DPDP data map, and who will reject a PWA-only parent app when the school's parents already use a native app with a 4-star rating. Publicly observed S61 S138 Risk and compliance sits with the school management committee and its parent representative, who now hold a copy of the DPDP Rules and will ask how face recognition of children is consented and how long footage is kept. Verified S20 S33 Procurement and finance want annual software in advance and milestone hardware payments; "hardware scoped after assessment" without a ceiling kills the file. Rax-supplied S3 Inferred End users are teachers, transport staff and parents; the Bihar and Uttar Pradesh attendance revolts show what happens when an attendance system ignores network, timing and burden, and the CampusCare reviews show what parents punish. Verified S54 S57 Publicly observed S61

For a state department the committee is different: the Director of School Education sets the programme, the state IT agency runs the tender, integrators bid L1, and Chief Education Officers inspect; a Kendriya Vidyalaya's principal raises a GeM goods bid open for a day; in Dubai and Saudi Arabia the group COO decides but KHDA, the RTA and the Ministry's NOOR system set the technical conditions. Verified S42 S51 S104 S105 Publicly observed S107 Rax-supplied S11

Jobs to be done and willingness to pay

SEGMENT	JOB TO BE DONE	WHAT THEY PAY TODAY	EVIDENCE	LABEL
CBSE schools and groups	Pass the CBSE inspection and the RTO fitness check; collect fees on time; stop parent complaints about the app	₹1 to 5 lakh a year ERP, ₹1 lakh CCTV fit-out, ₹3,000 to 5,000 per bus per month	Entab revenue per school; dealer and NeoTrack prices	Estimated: S63, S81, S89
Matriculation schools with buses	Keep the buses legal and the parents informed at the lowest cost	₹1,000 a month software plus ₹4,000 to 8,000 per device, or ₹30 per student per month	ProSchool360, MyClassAdmin	Publicly observed: S79, S80
Groups	See every campus on one dashboard; standardise compliance	Central contracts; in-house builds at the largest chains	Sri Chaitanya, K12 Techno	Publicly observed: S108, S111
State departments	Put cameras in schools after an incident, within budget, through a tender	₹30,000 to ₹75,000 per school; ₹41,000 per camera over five years in Delhi	TN, Karnataka, Delhi programmes	Estimated: S40, S42, S43
GCC groups	Meet RTA and ministry rules; integrate with NOOR or KHDA	SAR 90,000 per campus modelled in the Saudi dossier	IIBDAEI model	Rax-supplied: S11

Case studies from public evidence

The three case studies below describe what a deployment in each top segment looks like using public evidence; none is a Rax deployment.

Case study 1: a Chennai CBSE school after the 2025 CCTV amendment

Chettinad Vidyashram in Rajah Annamalaipuram has 8,019 students, 484 teachers, 210 classrooms, a bus service across Chennai and a class 10 annual fee of ₹86,975. Publicly observed S141 Clause 4.7.10 requires audio-visual cameras in every classroom, corridor, lab, library, canteen and playground with 15 days of retention; at 210 classrooms plus common areas this is a 250-camera estate, and at dealer prices of ₹5,000 to ₹9,000 per installed camera it is a ₹15 to 20 lakh fit-out with storage sized for 15 days of audio-video, plus an AMC. Verified S20 Estimated S89 S141 The same school must show GPS and CCTV on each bus at fitness time under the April 2024 directive, and from May 2027 must hold a consent record for any biometric processing of children. Verified S31 S33 The buyer's question is not "which ERP" but "who gives me one compliance record across cameras, buses and consent, and services it the same day"; that is the sale ZenCampus should design for, with the ERP as the ledger behind it. Inferred Recommendation

Case study 2: a multi-campus group standardising across districts

Velammal runs more than a lakh students and about 12,000 staff across Chennai and nine Tamil Nadu districts under several brands; Vels lists twelve campuses from Neelankarai to Erode; the PSBB group's Millennium network alone has 11,000 students. Publicly observed S109 S142 S143 Sri Chaitanya, the largest chain, ran 70 institutions manually until 2007 and now owns an edtech subsidiary, which shows both the trigger (manual systems break at scale) and the ceiling (the biggest groups build in-house). Publicly observed S108 A group buyer values one dashboard across campuses, a per-student rate that falls with volume, a vendor that can install and service in Madurai as well as Mogappair, and a migration path from whatever each campus runs today. Inferred Skolaro's Kolkata trust with 13 institutions and 20,000 students and Vidyalaya's six-school operator are the public examples of groups that bought a mid-market ERP for exactly these reasons. Publicly observed S73 S133 For Rax a group is the only way to reach a hundred campuses with two salespeople, and the only segment where the group's own IT team can shoulder deployment. Recommendation

Case study 3: a matriculation school with ten buses before the June inspection

Tamil Nadu's April 2024 directive, issued on Madras High Court orders, requires GPS and CCTV on every school bus, female helpers, drivers with ten years' experience and no police case, and upload of vehicle and driver details to the department. Verified S30 S31 A 600-student matriculation school with ten buses faces a choice the market has already priced: NeoTrack-class tracking with free hardware on subscription, a ProSchool360-class ERP at ₹1,000 a month with ₹4,000 to ₹8,000 devices from any vendor and ₹150 to ₹300 SIMs, or a per-student parent charge of ₹30 a month. Publicly observed S79 S80 S81 The AIS-140 device on a permit bus is a separate legal requirement whose feed the school's app should consume rather than duplicate. Verified S25 S26 The school's owner pays from fees regulated under the 2009 Act and will choose the option with no capital outlay and a Tamil-speaking support line; the sale is won on the transport in-charge's phone, not in the correspondent's office. Publicly observed S58 Inferred

Named research targets

Inclusion is a research target on public evidence, not a relationship or an expression of interest.

ORGANISATION	SEGMENT	PUBLIC EVIDENCE FOR FIT	LABEL
Velammal Educational Trust, Chennai	Group	More than a lakh students, 12,000 staff, nine districts, CBSE and matriculation brands	Publicly observed: S109
Vels Group schools, Chennai and Erode	Group	Twelve-plus campuses including Medavakkam, 3 km from Rax	Publicly observed: S142
PSBB and PSBB Millennium schools, Chennai	Group	Multiple CBSE campuses; Millennium network of 11,000 students	Publicly observed: S143
Chettinad Vidyashram, Chennai	CBSE school	8,019 students, 210 classrooms, bus service, ₹86,975 fee	Publicly observed: S141
DAV Group of Schools, Chennai	Group	Multi-campus CBSE group in Chennai (count Unknown)	Publicly observed: S148
Maharishi Vidya Mandir, Chennai	CBSE school	Chennai Sahodaya member; senior secondary	Publicly observed: S148

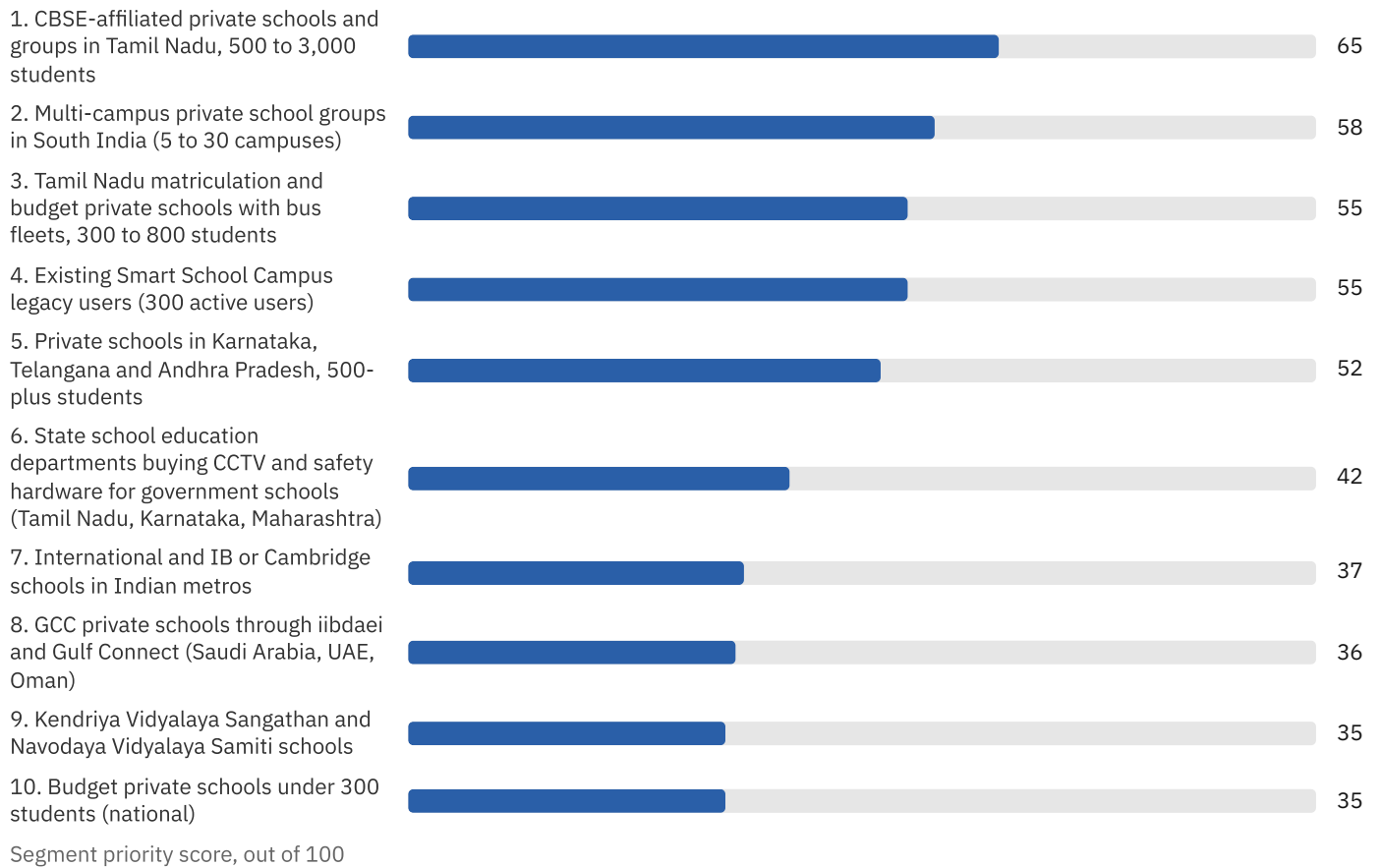
ORGANISATION	SEGMENT	PUBLIC EVIDENCE FOR FIT	LABEL
SRM Public School, Guduvanchery	CBSE school	Sahodaya member on the GST Road corridor	Publicly observed: S148
Crescent School, Vandalur	CBSE school	Sahodaya member near Rax's service radius	Publicly observed: S148
Velammal Bodhi Campus and Velammal Vidhyashram, Chennai	Group campuses	Listed Sahodaya members of the Velammal group	Publicly observed: S148
Greenfield Chennai International School, Madhavaram	CBSE school	Sahodaya member; international-branded	Publicly observed: S148
Chennai Sahodaya Schools Complex	Association	300-plus CBSE member schools, principal conclaves	Publicly observed: S148
Sri Chaitanya Educational Institutions	Chain	750 institutions, 650,000 students; in-house tech; 200 new CBSE schools planned	Publicly observed: S108
Narayana group (Telangana and Andhra Pradesh)	Chain	Peer of Sri Chaitanya; count Unknown	Inferred
Orchids The International School (K12 Techno)	Chain	75,000-plus students, 25-plus cities, PE-funded; central procurement	Publicly observed: S110, S111
Lighthouse Learning (EuroKids), KKR-owned	Chain	PE-owned pre-school and K-12 chain	Publicly observed: S111
Bhashyam Group of Schools	Chain	Teachmint reference in Telangana and Andhra Pradesh	Publicly observed: S135
Delhi Public School societies (franchise schools in Tamil Nadu)	CBSE chain	Teachmint reference; Entab-class incumbents	Publicly observed: S135
Tamil Nadu School Education Department (CCTV programme)	State	4,200 government high and higher secondary schools; ₹21 crore first phase	Verified: S42
Karnataka Department of School Education	State	₹10 crore CCTV sanction for 3,333 schools	Verified: S43
Kendriya Vidyalayas, Chennai region	Central	Per-school GeM CCTV and networking bids	Verified: S51
Navodaya Vidyalaya Samiti, Hyderabad region	Central	665 residential schools; hostel and safety needs	Verified: S13, S50
Ataa Educational and NCLE, Saudi Arabia	GCC	Listed groups with 45,200 and 32,000 students; targets in the Saudi dossier	Rax-supplied: S11
KHDA-regulated Dubai school groups	GCC	227 private schools; GPS and CCTV bus rules	Verified: S104, S105
Existing Smart School Campus users	Legacy	300 active users to be identified by Rax	Rax-supplied: S6

SO WHAT FOR RAX

Sell to the correspondent of a Chennai CBSE group, not to "schools": the group has the budget, the inspection dates and the IT staff, and one signed group is worth a hundred cold calls. ● Recommendation

Regardless of Price & features, what a School will require the most is SUPPORT & Vidyalaya provides us with that.

Ms. Suprabha Menon, Principal (CBSE), Navrachana Education Society, Vadodara, on the Vidyalaya site ● Publicly observed S133



#	SEGMENT	BUYER	SIZE	SCORE	EVIDENCE
1	CBSE-affiliated private schools and groups in Tamil Nadu, 500 to 3,000 students Fee-funded schools bound by CBSE clause 4.7.10 (audio-visual CCTV, 15-day retention), the Tamil Nadu bus directive (GPS, CCTV, helpers) and DPDP; they already run an ERP or parent app and need one accountable compliance record. Within a day's service radius of Chennai.	Correspondent or trustee decides; principal champions; transport in-charge and IT coordinator evaluate; parents on the school management committee are the risk voice	About 1,344 Tamil Nadu private unaided schools above 500 students across all boards (11.5% of 11,683, UDISE+ 2025-26); the CBSE subset is Unknown (the CBSE directory's state filter was not queried); Chennai Sahodaya alone lists 300-plus CBSE schools; 20 to 30 lakh students	65	Estimated S13 S153 S31 S148
2	Multi-campus private school groups in South India (5 to 30 campuses) Groups such as Velammal, Vels, PSBB, Sri Chaitanya and Narayana with central procurement, standard fleets and a group IT function; they want group dashboards, uniform compliance and a vendor who can service every campus.	Group CEO or trustee decides; group IT head evaluates; campus principals adopt; finance negotiates a per-student rate	Roughly 40 to 60 groups in Tamil Nadu, Karnataka, Telangana and Andhra Pradesh with 10 lakh-plus students combined; Velammal alone above 1 lakh	58	Estimated S108 S109 S142 S143

#	SEGMENT	BUYER	SIZE	SCORE	EVIDENCE
3	Tamil Nadu matriculation and budget private schools with bus fleets, 300 to 800 students State-board schools whose main dated obligation is the annual bus fitness inspection; they run fees on Tally and parents on WhatsApp, and buy transport tracking from NeoTrack-class vendors. Price-sensitive under the 2009 fee act.	Owner-correspondent decides; transport in-charge and office administrator evaluate; the RTO inspection is the trigger	About 3,300 Tamil Nadu private schools of 301 to 500 students plus part of the 1,700 of 201 to 300 (Table 2.3); 15 to 20 lakh students	55	Estimated S12 S31 S58 S81
4	Existing Smart School Campus legacy users (300 active users) Rax's own installed base on the non-AI predecessor; the cheapest conversion pool if it consists of schools, and a source of references if any will speak. These are users of the legacy Smart School Campus product; Rax has made no sales of the current ZenCampus product, so this segment is an upgrade prospect, not an existing ZenCampus customer base.	Whoever bought the legacy licence; unknown roles; contact data held by Rax	300 active users; whether users are schools, staff logins or students is Unknown	55	Rax-supplied S6 S7 S183
5	Private schools in Karnataka, Telangana and Andhra Pradesh, 500-plus students Second-ring states with 47,000 private schools and full internet coverage, but strong local incumbents (MyClassboard, Next Education, Sri Chaitanya in-house) and a service distance of 350 to 650 km.	Same committee as segment 1; more often served by Hyderabad or Bengaluru vendors	About 3,000 schools above 500 students across the three states; 40 lakh-plus students	52	Estimated S12 S70 S74 S108
6	State school education departments buying CCTV and safety hardware for government schools (Tamil Nadu, Karnataka, Maharashtra) Programmes such as Tamil Nadu's 4,200-school CCTV rollout and Karnataka's ₹10 crore sanction buy cameras and recorders through tenders and GeM at ₹30,000 to ₹75,000 per school; software is state-built and free.	Director of School Education and the state IT agency (ELCOT-type) tender; integrators bid L1; Chief Education Officers inspect	Tamil Nadu 4,200 schools, Karnataka 3,333, Maharashtra all schools after Badlapur; ₹20 to 60 crore per programme	42	Verified S42 S43 S44 S47
7	International and IB or Cambridge schools in Indian metros High-fee schools that buy global SIS (Classter, PowerSchool) and enterprise CCTV; expect ISO 27001, SOC 2 and native apps; 80 to 200 institutions concentrated in Delhi, Mumbai, Bengaluru, Hyderabad and Chennai.	Head of school and IT director; board approves; international parent body demanding	Low hundreds of schools; small student numbers but ₹3 to 10 lakh a year technology budgets	37	Inferred S95 S11

#	SEGMENT	BUYER	SIZE	SCORE	EVIDENCE
8	GCC private schools through iibdaei and Gulf Connect (Saudi Arabia, UAE, Oman) Dubai's 227 private schools and Saudi Arabia's 7,337 private schools face GPS and CCTV bus rules and NOOR or KHDA data exchange; the July 2026 Saudi dossier rates the product conditional pending Arabic UI, PDPL and hosting.	Group COO or owner; IT and incumbent SIS owner; ministry approvals; local integrator for buses	Dubai 227 schools and 387,441 students; Saudi 7,337 private schools; first target 15 campuses by year three per the Saudi model	36	● Rax-supplied S11 S104 S105
9	Kendriya Vidyalaya Sangathan and Navodaya Vidyalaya Samiti schools 1,286 KVs and 665 NVs run NIC and C-DAC systems for administration and buy CCTV and networking school by school on GeM as goods; no ERP purchase exists.	Principal and vidyalaya management committee raise GeM bids; KVS regional offices approve; L1 wins	1,951 schools, 16.8 lakh students; a few lakh rupees of hardware per school per cycle	35	● Verified S13 S49 S51
10	Budget private schools under 300 students (national) The bulk of the 3.4 lakh private schools; run on paper, WhatsApp and Tally; fee-capped; served, if at all, by ₹5,000 to ₹40,000 flat-price ERPs and app-based bus trackers.	Owner; decision on price and a neighbour's referral	About 2.4 lakh private unaided schools below 300 students; 3 to 4 crore students	35	● Estimated S12 S18 S58

Buying committee in a CBSE private school or group

Economic buyer

Correspondent, trustee or group CEO

NEEDS One price, a reference school, compliance certificates for CBSE and RTO inspection

KILLS THE DEAL Three conflicting prices; no named customer

Champion

Principal

NEEDS Fewer apps for teachers and parents, a working parent app, staff time saved

KILLS THE DEAL A second app on top of the existing ERP; training burden

Technical evaluator

IT coordinator or group IT head

NEEDS Data migration from the current ERP, APIs, uptime, hosting location, DPDP data map

KILLS THE DEAL PWA-only app; no ISO 27001; vendor holds fee ledger hostage

Risk and compliance

School management committee, parents' representative, DPDP-aware counsel

NEEDS Parental consent flow, 15-day footage retention, no profiling of children

KILLS THE DEAL Face recognition of students without a consent and retention policy

Procurement and finance

Accountant or group finance

NEEDS Annual invoice in advance for software, milestone payments for hardware, AMC terms

KILLS THE DEAL Hardware scoped 'after assessment' with no ceiling

End users

Teachers, transport in-charge, drivers and attendants, parents

NEEDS Attendance that works at the gate in one second, bus alerts that arrive, no daily logins

KILLS THE DEAL Slow app, wrong GPS, forced updates

Roles observed in vendor testimonials, review sites, tender documents and the CBSE and transport rules; the correspondent signs, the principal champions, the transport in-charge and IT coordinator can veto on practicality.

KEY TAKEAWAYS

- Forty competitors profiled, nineteen of them direct school-ERP vendors; the Indian ERP market is fragmented, domestic and price-transparent at the bottom (Fedena USD 999 a year, Campus 365 ₹5,999 a month).
(Publicly observed | S64 | S76)
- No incumbent sells ERP plus CCTV analytics plus bus hardware as one product, but every incumbent already integrates third-party biometric and GPS feeds, so "integration" is a feature they have, not a moat Rax has.
(Publicly observed | S62 | S133)
- The safety layer is owned locally: CCTV dealers install for ₹75,000 to ₹1.4 lakh a campus and NeoTrack tracks 25,745 school vehicles from Coimbatore with free hardware. (Publicly observed | S81 | S89)
- Rax's home city has a direct local rival (Chennai Campus) and its site borrows the exact claim language of Vidyalaya ("25+ years", "96% retention"). (Publicly observed | S1 | S120 | S133)
- Rax can win only where the buyer needs one accountable vendor for compliance across ERP, cameras and buses, and only after a named reference exists; it loses on price, references and app polish everywhere else. (Inferred)

Landscape overview

The competitive set falls into five layers. Direct competitors are Indian school-ERP suites sold to private schools: Entab, Fedena, Vidyalaya, MyClassboard, Skolaro, Schoolpad, Edunext, Campus 365, Chennai Campus, ProSchool360 and the venture-backed content-plus-ERP bundlers Teachmint, LEAD, Uolo, Next Education and Extramarks.

(Publicly observed | S60 | S64 | S69 | S70 | S71 | S73 | S74 | S75 | S76 | S77 | S78 | S79 | S97) Indirect competitors sell one function each: bus tracking (NeoTrack, LocoNav, Chakravier, Conjoinix), attendance (Truein, eSSL, Matrix, Realtime), and CCTV (CP Plus, Prama Hikvision, Matrix). (Publicly observed | S81 | S82 | S83 | S84 | S85 | S86 | S87 | S88 | S140) Substitutes are free government platforms in government and aided schools, spreadsheets and WhatsApp in small private schools, open-source Frappe Education, and in-house builds by large chains. (Verified | S46 | S48 | S49) (Publicly observed | S96 | S108) Partner-competitors are the local CCTV dealers, ICT-scheme vendors and AIS-140 device makers who own the installation layer and could carry or block a ZenCampus sale. (Publicly observed | S89 | S98) (Verified | S29) Pass 2 added five profiles. Videonetics (Kolkata) and Staqu (Gurugram) are Indian video-analytics platforms that already sell face-recognition attendance and campus vehicle tracking on existing cameras, the exact capability Rax's EVA line would bring to schools; both sell through integrators to universities and enterprises rather than K-12. (Publicly observed | S172 | S173) Airtel Xsafe is a telecom-backed cloud camera service at ₹999 a year per camera, a substitute for a recorder in pre-schools and small schools, though not designed for a CBSE audio-visual estate. (Publicly observed | S171) EduGradUP publishes a flat ₹9,000 a year for a 43-module ERP, the floor of the price ladder. (Publicly observed | S179) Embibe, named in the brief, sells learning content, not administration software, and competes for a different budget line. (Publicly observed | S182)

Imports matter only in hardware: cameras and recorders are mostly Chinese-origin through Indian distributors, now filtered by the ER-01 security regime; software is entirely domestic, with global SIS vendors (Classter, Classe365, PowerSchool) confined to international schools and the GCC. (Verified | S122) (Publicly observed | S94 | S95) (Rax-supplied | S11) Price tiers run from free (government platforms, spreadsheets) through budget ERPs at ₹5,000 to ₹72,000 a year per school, mid-market per-student pricing of ₹100 to ₹500 a year, to content bundles that charge per student for books and content with the ERP thrown in. (Publicly observed | S76 | S92 | S93) (Inferred)

Competitor profiles

The full profiles, with type, threat, price band, strengths and weaknesses, are in `data/competitors.json` and render below this section. Five deep-dives follow for the vendors Rax will meet most often in a Chennai CBSE school.

Deep-dive 1: Entab CampusCare

Entab Infotech (Delhi, founded 2001) is the largest Indian K-12 ERP by revenue at ₹40.74 crore in FY2025, up 5%, and claims 1,200-plus schools. (Publicly observed | S60 | S63) Its CampusCare parent app has 4 lakh-plus installs and 124,000 Play Store reviews at 4.0 stars; the company's 2026 site leads with AI analytics, at-risk prediction, a chatbot, multi-factor authentication and "compliance with global data protection standards". (Publicly observed | S61 | S62 | S139) Its bus-tracking is a module inside the parent app fed by third-party GPS, not a device. (Publicly observed | S62) Pricing is quote-only; a review aggregator puts

Indian K-12 ERPs at ₹100 to ₹500 per student a year, and Entab's revenue implies roughly ₹3.4 lakh per school a year across its claimed base, which is consistent with per-student pricing on 700-student CBSE schools. Publicly observed S60

Estimated S63 Weaknesses buyers voice are the app itself: forced logins, monthly updates that eat data, PDF download failures and crashes. Publicly observed S61 Entab is the benchmark Rax will be measured against in any CBSE school in Delhi, and its per-school revenue is the ceiling of what a mature Indian ERP earns.

Deep-dive 2: Fedena (Foradian Technologies)

Fedena, from Bengaluru, is the price anchor. It publishes three plans at USD 999, 1,399 and 1,699 a year per institute with unlimited users and free cloud hosting, a 14-day trial, and an enterprise tier on quote; the basic code is open source and an OEM programme lets resellers sell "your label, your price with our code". Publicly observed S64 S65 It claims 40,000-plus institutes worldwide and 20 million users, integrates biometric devices, location and payment gateways, and sells a multi-school edition for groups. Publicly observed S64 S65 Its testimonials are small schools in Goa, Assam and Prayagraj. Publicly observed S64 For a 1,000-student school Fedena costs about ₹85,000 a year, or ₹85 per student, which is below Rax's stated ₹10 per student only if "₹10" is per month; that ambiguity in Rax's own price must be resolved before any comparison is made. Estimated S64 Rax-supplied S3 Fedena's white-label programme is also the fastest way any local integrator, including a CCTV dealer, could add an ERP to its offer, which is exactly the partner Rax wants.

Deep-dive 3: Vidyalaya School ERP

Vidyalaya (Ahmedabad) claims 25-plus years, 2,000-plus clients, 96% client retention, 1.5 million students and 40-plus modules, with 487 SoftwareSuggest reviews averaging 5/5. Publicly observed S71 S133 It is the closest functional match to ZenCampus among incumbents because its integrations already cover biometric attendance, vehicle tracking, WhatsApp, Tally, barcode and online payment, and its 2026 site advertises "AI powered school transport management" and "AI based attendance". Publicly observed S133 Its stated weaknesses are in the reviews: occasional slowness and bugs and slow support responses, and its field presence is Gujarat-centred. Publicly observed S71 The zencampus.ai home page carries the same three claims, "25+ years", a client count and "96% client retention", which for Rax's AI product (0 users) is not sustainable and for Vidyalaya is at least plausible; a buyer who searches both sites will notice. Publicly observed S1 S133 Inferred

Deep-dive 4: Teachmint

Teachmint raised USD 118 million, has 10 million-plus app downloads at 4.5 stars, and lists Delhi Public School, City Montessori School, Daly College and the Bhashyam group among references. Publicly observed S66 S135 S136 Its 2026 home page leads with Teachmint X, 75- and 86-inch interactive boards with a three-year on-site warranty and an AI teaching assistant, and gives a Dubai contact address alongside Saudi and Philippine references, so its centre of gravity has moved from school ERP to classroom hardware and international sales. Publicly observed S135 Reviews praise ease of use and fee collection and complain of crashes during online tests, weak parent support and the lack of a local office (Kerala). Publicly observed S67 S68 Teachmint shows what a funded competitor does when ERP margins are thin: it attaches hardware with a warranty, which is the same instinct behind ZenCampus, executed with a balance sheet Rax does not have.

Deep-dive 5: NeoTrack (NeoSay Technologies, Coimbatore)

NeoTrack is the incumbent for the bus layer in Rax's own state: 650-plus schools, 25,745 vehicles, 320,060 subscriptions, a 4.7-star app, RFID or face attendance on the bus, alerts in regional languages and AI reporting. Publicly observed S81 Its commercial model is the one Rax must price against: hardware and installation free, the school pays only a subscription, against a market where basic trackers cost ₹3,000 to ₹5,000 with ₹1,500 to ₹3,000 a month and premium AIS-approved kits cost ₹12,000 to ₹20,000 with ₹5,000 to ₹8,000 a month per bus. Publicly observed S81 NeoTrack's own buyer checklist, which asks whether hardware is free, how often GPS updates, whether attendance is automated and what the hidden SIM and maintenance fees are, is the checklist a Tamil Nadu transport manager will apply to ZenCampus. Publicly observed S81 Chennai Campus (eHash) plays the same local-incumbent role for the ERP: a Chennai company since 2013 with seven releases and Tamil-speaking support. Publicly observed S78 S120

Feature and price comparison against Rax

CRITERION	ZENCAMPUS	ENTAB	FEDENA	VIDYALAYA	NEOTRACK	CP PLUS	LABEL
BUYERS USE	(CLAIMED)					VIA DEALER	
Fees, records, payroll, exams	Yes, 14 modules	Yes	Yes, 59 modules	Yes, 40-plus	No	No	Rax-supplied: S3; Publicly observed: S64, S133

CRITERION BUYERS USE	ZENCAMPUS (CLAIMED)	ENTAB	FEDENA	VIDYALAYA	NEOTRACK	CP PLUS VIA DEALER	LABEL
Parent app maturity	PWA demo tenant	124K reviews, 4.0	Branded iOS and Android	Parent and management apps	4.7-star app	None	Publicly observed: S2, S61, S64, S81, S133
Bus tracking	Own GT-500M, not AIS-140	Module on third-party GPS	Location integration	Vehicle-tracking integration	AIS-approved options, hardware free	Mobile DVR with GPS	Verified: S29; Publicly observed: S62, S81, S88
CCTV and face attendance	From CCTV, unproven	No	Biometric integration	Biometric integration	Face attendance on bus	Cameras, analytics, panic buttons	Publicly observed: S64, S81, S88, S133; Unknown for Rax
Energy, water, environment	Yes, claimed	No	No	No	No	No	Rax-supplied: S3
Published price	₹10 per student; ₹1 lakh licence on IndiaMART	Quote	USD 999 to 1,699 a year	Quote	Subscription only	₹25,000 to ₹1.4 lakh per campus	Rax-supplied: S3; Publicly observed: S9, S64, S81, S89
Security attestation	None public	MFA, "global standards"	Cloud hosting, encryption	Secure cloud	Not stated	STQC-certified models required by law	Publicly observed: S139; Verified: S122; Unknown for Rax
Named references	None	DPS-class schools	Small schools	Navrachana Vadodara, six-school operator	650 schools	Every dealer's local schools	Publicly observed: S64, S81, S133; Unknown for Rax

Positioning map narrative

On the map in `data/positioning.json` the horizontal axis is what a 1,000-student school pays a year for comparable scope and the vertical axis is scope from one function to an integrated ERP-plus-safety stack. The crowded space is the middle: ERP suites at ₹1 to 5 lakh a year with parent apps and third-party integrations (Entab, Vidyalaya, MyClassboard, Teachmint, Uolo). Publicly observed S61 S133 S137 S138 The bottom-left is occupied by free government platforms and spreadsheets, and the bottom row by single-function safety vendors (NeoTrack, Truein, CP Plus dealers). Verified S48 Publicly observed S81 S84 S89 The top of the map, ERP plus cameras plus buses plus telemetry from one vendor, is empty, which is where Rax places itself; it is empty partly because no one has proven a school will pay one vendor for all of it, and partly because the installation layer is local and low-margin. Inferred LEAD and Uolo sit high on price because they bundle content, not because they bundle hardware. Publicly observed S69 S77

Where Rax wins and loses

Rax wins where a school group wants one accountable vendor for the compliance stack that CBSE clause 4.7.10, the bus directive and DPDP now require, where the buyer values Indian design and manufacture of the camera analytics and gateway, and where a Chennai address means same-day service. Verified S20 S31 S33 Rax-supplied S7 It can also win the small-fleet transport case that NeoTrack under-serves if it integrates AIS-140 feeds rather than selling its own tracker.

Verified S29 Inferred

Rax loses on references (none named against 650 to 2,000 for incumbents), on app polish (a PWA against native apps with hundreds of thousands of reviews), on published price clarity, on security attestations, and on channel: every incumbent has a partner programme and Rax's own channel attempts have failed. Publicly observed S61 S65 S81 S133 Rax-supplied S7 Buyers say of incumbents that support is what they value most ("Regardless of Price & features, what a School will require the most is SUPPORT", a Vadodara principal on Vidyalaya), that parent apps become a "monopoly with the schools" (a CampusCare reviewer), and that transport vendors hide recurring fees. Publicly observed S61 S81 S133

Competitor responses to expect

If ZenCampus gains share in Tamil Nadu, Vidyalaya and Entab will point to their existing vehicle-tracking and biometric integrations and match any bundle with a partner; NeoTrack will extend its free-hardware model to on-campus face attendance, which it already runs on buses; CP Plus dealers will bundle a Fedena white-label ERP with camera installations; Chennai Campus will compete on Tamil support and price; and the funded players will ignore Rax until it has a hundred schools.

Publicly observed S65 S81 S88 S133 Inferred The response Rax cannot match is free hardware against subscription, which requires capital; the response it can pre-empt is a reference and a published price. Recommendation

Substitutes in practice

The substitute that matters most by count is no software at all: 8,50,511 schools have fewer than 100 students and most of the private ones run on paper registers, a WhatsApp group per class and Tally at the fee counter; the largest chains ran that way until 2007. Verified S18 Publicly observed S108 The substitute that matters most by value is the state: Kerala's

Sampoorna is mandatory for every government and aided student, KVS and NVS run NIC and C-DAC systems, and Andhra Pradesh and Tamil Nadu run face and Aadhaar attendance for staff, so a commercial vendor cannot sell any of those functions into those schools. Verified S46 S47 S48 S49 Open-source Frappe Education removes the licence line for a school with an IT partner, and chains such as Sri Chaitanya and K12 Techno build in-house, so the real addressable base is the private unaided

school between 300 and 3,000 students that is not part of a technology-owning chain. Publicly observed S96 S108 S111

Inferred

SO WHAT FOR RAX

Rax should stop positioning against Entab and Fedena as an ERP and position against the CCTV dealer and NeoTrack as the compliance layer, partnering with a white-label ERP where the school already has one. Recommendation

COMPETITOR	TYPE	PRODUCTS IN INDIA	PRICE BAND	INDIA PRESENCE	THREAT
Campus 365 India (online)	direct	School ERP with 60-plus modules, live classes, proctored exams, RFID attendance integration, payment gateway; reseller and OEM programme with device discounts	Lite ₹5,999 per month billed yearly for under 300 students; Enterprise on quote	Sells direct online and through OEM resellers	medium
Chennai Campus (eHash Softwares) Chennai	direct	Cloud school ERP with mobile apps: admissions, attendance, exams, fees, transport, HR, library	Quote; free demo	Tamil Nadu and South India school ERP since 2013; seven releases; IndiaMART listing	high
Classe365 Global (India customers)	direct	SIS, LMS and CRM for schools and colleges	Benchmark USD 2 to 15 per student per month globally; Capterra lists USD 100 per user per month starting price	Global SaaS with Indian schools among users; Capterra top-rated	low
Classter Greece (sells into GCC and international schools)	direct	Modular SIS, LMS, CRM with 40-plus integrations	EUR 21.5 per active student per year in the published example	Marginal in India; relevant to the GCC route	low
EduGradUP India (online vendor)	direct	Cloud school ERP with 43 modules, parent app, transport GPS module	Flat ₹9,000 a year, all modules	Claims schools in 15-plus states, mostly north and central India, in six languages	low
Edunext Technologies Noida	direct	School ERP, mobile apps, digital platforms	Price on request	North-India school ERP with mobile apps; customer count not published on the page opened	medium
Entab CampusCare New Delhi	direct	School ERP and student information system, parent and teacher apps, LMS, website, GPS bus tracking module, AI analytics dashboard (2026)	Quote-based; industry-typical ₹100 to ₹500 per student per year	1,200-plus schools claimed; ₹40.74 crore revenue FY2025; CampusCare parent app with 124K Play reviews	high
Extramarks Noida	direct	Smart class content, assessments, and a school ERP layer	Quote-based	Claims 5,000-plus schools; Smart Class Plus with ERP-type features	low
Fedena (Foradian Technologies) Bengaluru	direct	Cloud school ERP with 20 core, 17 standard, 10 premium and 12 ultimate modules; branded iOS and Android apps; biometric, location, payment gateway and online-class integrations; OEM white-label programme	USD 999 to 1,699 per institute per year, unlimited users; enterprise on quote	Claims 40,000-plus institutes worldwide; open-source core; India HQ	high
LEAD Group Mumbai	direct	Integrated school system: curriculum, books, smart classes, teacher training and an ERP, sold as a bundle to affordable private schools	Bundle priced per student per year; product sales 79% of revenue	8,000-plus partner schools in 400-plus cities; revenue ₹351 crore FY24; loss ₹143 crore	medium

COMPETITOR	TYPE	PRODUCTS IN INDIA	PRICE BAND	INDIA PRESENCE	THREAT
MyClassAdmin Vasai Virar, Maharashtra	direct	School bus tracking and transport management app sold with a school admin suite	₹30 per student per month; ₹5,900 listing	IndiaMART listing	low
MyClassboard Hyderabad	direct	SaaS school ERP, finance, admission, HR, LMS, connect; safety and security solutions listed	Price on request	1,200-plus schools claimed; MCB parent app 10 lakh-plus downloads	high
Next Education (NextERP) Hyderabad and Noida	direct	School ERP integrated with digital content and LMS; admission, fees and transport monitoring	Quote-based	Claims 18,000 schools and 12 million students; products TeachNext and NextERP	medium
ProSchool360 India (online)	direct	School ERP with fee, attendance and parent app, GPS bus tracking integration with RFID boarding alerts on WhatsApp; hardware-agnostic (Teltonika, Concox, Queclink)	Premium ₹1,000 per month per school; GPS hardware ₹4,000 to ₹8,000 per bus from any vendor	500-plus schools in 18-plus states	medium
Schoolpad Chandigarh	direct	Cloud school ERP for K-12: attendance, exams, report cards, fees, transport, library, HR, payroll, parent communication; a personal coach per school	Contact vendor	8,000-plus educators, 1.5 lakh student profiles, 45,000 online fee transactions	low
Skolaro Delhi NCR	direct	Cloud school ERP with 50-plus modules for schools, colleges and universities; branded iOS and Android apps	Quote-based; positioned as affordable	Testimonials from a Kolkata trust with 13 institutions and 20,000 students and from India International School, Ghaziabad	medium
Teachmint Bengaluru (contact address in Dubai)	direct	School ERP and LMS, parent app, fee collection; from 2025 the lead product is Teachmint X interactive boards (75 and 86 inch) with EduAI	Software plans on quote; a listing cites USD 5 per user per year; boards priced on demo	10 million-plus app downloads; USD 118 million raised; references include DPS, City Montessori School, Daly College, Bhashyam group	medium
Uolo Gurugram	direct	Practice-based learning programmes bundled with a school management platform and parent app (Uolo Learn, 1 million-plus downloads)	Per-student programme fees; platform bundled	2,500 paying schools with 1.1 million paying students (2025); site claims 15,000 schools and 5.5 million students; USD 41.2 million raised	medium
Vidyalaya School ERP Ahmedabad	direct	40-plus module school ERP with parent, school and management apps; integrations for biometric attendance, vehicle tracking, WhatsApp, Tally, barcode, e-exam, online payment	Quote-based	Claims 2,000-plus clients, 1.5 million students, 25-plus years, 96% retention; 487 SoftwareSuggest reviews	high
Chakraview Mumbai	indirect	App-based school-bus tracking using attendant and operator phones instead of a GPS device	Low; app-based	Parent app on Google Play	low
Conjoinix XSSecure Pathankot	indirect	GPS bus tracking with parent app, pick-up and drop alerts, breakdown alerts	Quote-based	School Bus Tracker app with 2.33K reviews	low

COMPETITOR	TYPE	PRODUCTS IN INDIA	PRICE BAND	INDIA PRESENCE	THREAT
CP PLUS New Delhi	indirect	Cameras, NVRs, campus reference design with panic buttons and audio analytics, mobile DVR with GPS for school buses	16-camera packages ₹25,000 to ₹1,00,000-plus; per camera ₹650 to ₹9,000	Leading Indian CCTV brand with a published campus solution and mobile DVR for school vans	high
Embibe Bengaluru	indirect	AI learning videos, practice and tests for school boards	Consumer subscription; free Jio trial	Learning content platform in 12 languages; Jio user offer	low
eSSL Security Bengaluru	indirect	Fingerprint and face terminals (AI-Face series), access control, boom barriers	Device pricing through dealers	Claims 40 lakh customers; dealer network; education listed	medium
LocoNav Gurugram	indirect	AIS-140 certified GPS trackers with SOS, geofencing, parent app, driver behaviour, fuel	Quote-based	National telematics vendor with school-bus line	medium
Matrix Comsec Vadodara	indirect	COSEC access control and attendance (to 10 lakh users), IP cameras compliant with ER-01	Quote-based	National access-control, time-attendance and CCTV maker; STQC-certified cameras	medium
NeoTrack (NeoSay Technologies) Coimbatore	indirect	AI school-bus tracking with RFID or face attendance on the bus, parent alerts in regional languages, analytics; hardware and installation free against subscription	Subscription only; market ranges ₹1,500 to ₹8,000 per bus per month by tier	650-plus schools, 25,745 vehicles, 320,060 subscriptions; 4.7-star app	high
Prama Hikvision Mumbai	indirect	Cameras, NVRs, face-recognition terminals, analytics	Through distributors; entry cameras ₹2,500 to ₹20,000	Hikvision's Indian joint venture; dominant camera brand in Indian distribution	high
Realtime Biometrics (via HBS Automation) New Delhi	indirect	Standalone face-recognition attendance terminals	₹20,500 per device (T501 on IndiaMART)	Marketplace terminals	low
Truein Pune	indirect	Hardware-less face-recognition attendance on any phone or tablet kiosk with geofencing and payroll reports	₹290 to ₹390 per user per year; USD 4 to 6 per user plus a ₹69,000 base on another listing	Enterprise and school staff attendance; ISO 27001 and SOC 2	medium
Airtel Xsafe New Delhi (Bharti Airtel)	substitute	Indoor and outdoor Wi-Fi cameras, cloud recording, person detection, app alerts	₹999 a year per camera plus ₹699 per additional camera; cameras ₹2,499 to ₹4,499	Wi-Fi cameras with Airtel cloud storage and installation in 40-plus cities including Chennai	low
Frappe Education (ERPNext) Mumbai (open source)	substitute	Enrolment, classes, assessments, fees on the ERPNext platform, AGPL-3.0	Free software; implementation and hosting paid	Open-source ERP for academic institutes; hosted on Frappe Cloud; Indian IT shops implement it	low
In-house builds by school chains (Sri Chaitanya, K12 Techno/Orchids) Hyderabad, Bengaluru	substitute	Proprietary ERP, parent apps and learning platforms (Infinity Learn, Rankguru)	Internal cost	Chains with 75,000 to 650,000 students run their own technology subsidiaries	medium

COMPETITOR	TYPE	PRODUCTS IN INDIA	PRICE BAND	INDIA PRESENCE	THREAT
Spreadsheets, WhatsApp groups and Tally None	substitute	Excel or Google Sheets registers, WhatsApp class groups, Tally for fees, paper diaries	Effectively free	The default in most of the 3.4 lakh private schools below 300 students	high
State and central government platforms (Sampoorna, Shaala Darpan, EMIS, AP face attendance) State governments, NIC, C-DAC, KITE	substitute	Free student information, attendance and reporting systems built and hosted by government agencies	Free to schools	Mandatory in government and aided schools of Kerala, Rajasthan, all KVs and NVs, Tamil Nadu; AP face attendance for 1.67 lakh teachers	high
AIS-140 VLT device makers on the ARAI list Across India	partner-competitor	Type-approved GPS and NavIC trackers with panic buttons, state-backend integration	₹6,000 to ₹11,000 per device	About 90 approved manufacturers on the January 2026 ARAI list	medium
iDream Education (ICT-scheme vendor) Gurugram	partner-competitor	Tablet labs, LMS, smart-class content for government schools	Scheme grant ceilings (₹2.40 lakh and ₹6.40 lakh per school)	Sells ICT labs, smart classrooms and tablets to states under Samagra Shiksha ICT grants	low
Local CCTV and low-voltage dealers (SBM Technologies-type, Chennai) Chennai and every district town	partner-competitor	Camera supply, cabling, NVR, UPS, installation and AMC	₹9,000 (2 cameras) to ₹1,40,000 (16 cameras) installed	Install 16-camera school systems for ₹75,000 to ₹1,40,000; sell CP Plus and Hikvision	medium
Staqu Technologies (JARVIS) Gurugram	partner-competitor	JARVIS AI video analytics on existing cameras: facial recognition attendance and access, intrusion, fire, ANPR; ERP and HRMS integration by API	Quote-based	200-plus clients claimed; state police, retail, manufacturing and a university	low
Videonetics Kolkata	partner-competitor	Video management system, AI video analytics, facial recognition with automated attendance, campus traffic and bus tracking	Quote-based, integrator-led	Indian video management and analytics vendor sold through system integrators; education campus solution page	medium

Competitor profiles

– **Campus 365** direct · threat medium Publicly observed S76

India (online) · Sells direct online and through OEM resellers · Lite ₹5,999 per month billed yearly for under 300 students; Enterprise on quote

STRENGTHS

- Lowest published entry price with unlimited students
- Reseller programme

WEAKNESSES

- Thin support at the Lite tier
- No hardware installation

– **Chennai Campus (eHash Softwares)** direct · threat high Publicly observed | S78 | S120

Chennai · Tamil Nadu and South India school ERP since 2013; seven releases; IndiaMART listing · Quote; free demo

STRENGTHS

- Local, Tamil-speaking support in Rax's home city
- Sells to matriculation schools that Rax would target

WEAKNESSES

- Small company; no safety hardware
- Low web presence

– **Classe365** direct · threat low Publicly observed | S94

Global (India customers) · Global SaaS with Indian schools among users; Capterra top-rated · Benchmark USD 2 to 15 per student per month globally; Capterra lists USD 100 per user per month starting price

STRENGTHS

- High review scores
- Modern integrations

WEAKNESSES

- Dollar pricing far above Indian norms
- No India field presence

– **Classter** direct · threat low Publicly observed | S95

Greece (sells into GCC and international schools) · Marginal in India; relevant to the GCC route · EUR 21.5 per active student per year in the published example

STRENGTHS

- Modular per-student pricing
- GCC presence

WEAKNESSES

- Not localised for Indian boards or fees

– **EduGradUP** direct · threat low Publicly observed | S179

India (online vendor) · Claims schools in 15-plus states, mostly north and central India, in six languages · Flat ₹9,000 a year, all modules

STRENGTHS

- Lowest published flat price found
- Transport GPS module included

WEAKNESSES

- No named customers or school count verified
- Unsourced market claims on its own site

– **Edunext Technologies** direct · threat medium Publicly observed | S72 | S92

Noida · North-India school ERP with mobile apps; customer count not published on the page opened · Price on request

STRENGTHS

- Long-standing CBSE-school ERP
- Listed alongside MyClassboard in comparison sites

WEAKNESSES

- No public pricing or scale figures
- Limited southern presence

– **Entab CampusCare** direct · threat high Publicly observed | S60 | S61 | S62 | S63 | S139

New Delhi · 1,200-plus schools claimed; ₹40.74 crore revenue FY2025; CampusCare parent app with 124K Play reviews · Quote-based; industry-typical ₹100 to ₹500 per student per year

STRENGTHS

- Largest Indian K-12 ERP by revenue
- Deep CBSE and Delhi-NCR base with 4 lakh-plus app installs
- Adding AI analytics and security messaging (MFA, role-based access)

WEAKNESSES

- Parent app reviews complain of forced logins, monthly updates, data use and crashes
- Quote-only pricing
- No campus IoT or CCTV analytics

– **Extramarks** direct · threat low Publicly observed | S97

Noida · Claims 5,000-plus schools; Smart Class Plus with ERP-type features · Quote-based

STRENGTHS

- Content brand recognition in schools

WEAKNESSES

- ERP is secondary; no safety hardware

– **Fedena (Foradian Technologies)** direct · threat high Publicly observed | S64 | S65

Bengaluru · Claims 40,000-plus institutes worldwide; open-source core; India HQ · USD 999 to 1,699 per institute per year, unlimited users; enterprise on quote

STRENGTHS

- Published flat pricing that undercuts per-student models for large schools
- Open-source lineage and white-label resellers extend reach
- Multi-school edition for groups

WEAKNESSES

- Flat price per institute leaves little service margin for on-site support
- No hardware, CCTV or AIS-140 offer
- Testimonials skew to small schools

– **LEAD Group** direct · threat medium Publicly observed | S69

Mumbai · 8,000-plus partner schools in 400-plus cities; revenue ₹351 crore FY24; loss ₹143 crore · Bundle priced per student per year; product sales 79% of revenue

STRENGTHS

- Scale and a field sales force reaching tier-2 and tier-3 schools
- Unicorn funding (USD 180 million raised)
- Owns the academic relationship, so the ERP rides on the bundle

WEAKNESSES

- ERP is secondary to content
- Loss-making; cost control
- No safety hardware

– **MyClassAdmin** direct · threat low Publicly observed | S80

Vasai Virar, Maharashtra · IndiaMART listing · ₹30 per student per month; ₹5,900 listing

STRENGTHS

- Per-student transport pricing that parents can be charged directly

WEAKNESSES

- Marketplace-grade vendor with no scale evidence

– **MyClassboard** direct · threat high Publicly observed | S74 | S92 | S137

Hyderabad · 1,200-plus schools claimed; MCB parent app 10 lakh-plus downloads · Price on request

STRENGTHS

- Strong in Telangana and Andhra Pradesh, the second ring for Rax
- Established SaaS model

WEAKNESSES

- Parent app rated 3.2 stars across 60K reviews, the weakest of the majors
- No published pricing

– **Next Education (NextERP)** direct · threat medium Publicly observed | S70

Hyderabad and Noida · Claims 18,000 schools and 12 million students; products TeachNext and NextERP · Quote-based

STRENGTHS

- Large claimed base and content bundle
- South Indian presence

WEAKNESSES

- Claims unverified by audited figures
- No API per listing; no safety hardware

– **ProSchool360** direct · threat medium ● Publicly observed S79

India (online) · 500-plus schools in 18-plus states · Premium ₹1,000 per month per school; GPS hardware ₹4,000 to ₹8,000 per bus from any vendor

STRENGTHS

- Cheapest integrated ERP plus bus tracking observed
- No per-bus software fee

WEAKNESSES

- Thin brand; support depth unknown

– **Schoolpad** direct · threat low ● Publicly observed S75 S114

Chandigarh · 8,000-plus educators, 1.5 lakh student profiles, 45,000 online fee transactions · Contact vendor

STRENGTHS

- Service-heavy onboarding model
- Parent engagement metrics published

WEAKNESSES

- Small scale, single review on Capterra
- North-India footprint

– **Skolaro** direct · threat medium ● Publicly observed S73

Delhi NCR · Testimonials from a Kolkata trust with 13 institutions and 20,000 students and from India International School, Ghaziabad · Quote-based; positioned as affordable

STRENGTHS

- Multi-institution trusts as customers
- Custom app delivery

WEAKNESSES

- No published pricing
- No safety hardware

– **Teachmint** direct · threat medium ● Publicly observed S66 S67 S68 S135 S136

Bengaluru (contact address in Dubai) · 10 million-plus app downloads; USD 118 million raised; references include DPS, City Montessori School, Daly College, Bhashyam group · Software plans on quote; a listing cites USD 5 per user per year; boards priced on demo

STRENGTHS

- Well funded and widely installed
- Brand recognition among teachers
- Bundles hardware boards with three-year on-site warranty

WEAKNESSES

- Strategic pivot to hardware boards and international markets
- Reviews cite crashes during online tests and weak parent support
- No campus safety hardware

– **Uolo** direct · threat medium ● Publicly observed S77 S134 S138

Gurugram · 2,500 paying schools with 1.1 million paying students (2025); site claims 15,000 schools and 5.5 million students; USD 41.2 million raised · Per-student programme fees; platform bundled

STRENGTHS

- Funded and growing (USD 7 million in December 2025)
- Parent app rated 4.2

WEAKNESSES

- ERP is an adjunct to content sales
 - Claims on site far exceed reported paying base
-

– **Vidyalaya School ERP** direct · threat high ● Publicly observed S71 S133

Ahmedabad · Claims 2,000-plus clients, 1.5 million students, 25-plus years, 96% retention; 487 SoftwareSuggest reviews · Quote-based

STRENGTHS

- Broadest integration list among Indian mid-market ERPs, including vehicle tracking and biometrics
- Strong review volume and CBSE testimonials
- Partner programme

WEAKNESSES

- Reviewers report slowness, bugs and slow support
- Gujarat-centred field presence
- Hardware supplied by third parties

– **Chakrerview** indirect · threat low ● Publicly observed S83

Mumbai · Parent app on Google Play · Low; app-based

STRENGTHS

- No hardware
- Cheap for small fleets

WEAKNESSES

- Not an AIS-140 device; depends on attendant phones

– **Conjoinix XSSecure** indirect · threat low ● Publicly observed S118

Pathankot · School Bus Tracker app with 2.33K reviews · Quote-based

STRENGTHS

- Working parent app at scale (3.6 stars)

WEAKNESSES

- Low ratings; regional

– **CP PLUS** indirect · threat high ● Publicly observed S88 S90

New Delhi · Leading Indian CCTV brand with a published campus solution and mobile DVR for school vans · 16-camera packages ₹25,000 to ₹1,00,000-plus; per camera ₹650 to ₹9,000

STRENGTHS

- Every CCTV dealer stocks it
- Already ships bus DVR with GPS

WEAKNESSES

- No ERP; sells through dealers who own the school relationship

– **Embibe** indirect · threat low ● Publicly observed S182

Bengaluru · Learning content platform in 12 languages; Jio user offer · Consumer subscription; free Jio trial

STRENGTHS

- Content scale and Reliance distribution

WEAKNESSES

- No ERP, attendance or campus-safety product found; competes for the school's digital budget, not the administration budget

– **eSSL Security** indirect · threat medium ● Publicly observed S85

Bengaluru · Claims 40 lakh customers; dealer network; education listed · Device pricing through dealers

STRENGTHS

- Dealer network in every city
- Cheap terminals

WEAKNESSES

- No end-user support; hardware only

– **LocoNav** indirect · threat medium ● Publicly observed | S82

Gurugram · National telematics vendor with school-bus line · Quote-based

STRENGTHS

- AIS-140 certification and state backend integration
- Fleet-grade analytics

WEAKNESSES

- Generic fleet product; school features are a skin

– **Matrix Comsec** indirect · threat medium ● Publicly observed | S86 | S124

Vadodara · National access-control, time-attendance and CCTV maker; STQC-certified cameras · Quote-based

STRENGTHS

- Indian OEM with STQC and BIS compliance done
- Education vertical

WEAKNESSES

- Enterprise sales motion; not a school ERP

– **NeoTrack (NeoSay Technologies)** indirect · threat high ● Publicly observed | S81

Coimbatore · 650-plus schools, 25,745 vehicles, 320,060 subscriptions; 4.7-star app · Subscription only; market ranges ₹1,500 to ₹8,000 per bus per month by tier

STRENGTHS

- Tamil Nadu-based and already at scale in Rax's first ring
- Hardware-free commercial model that a school will compare against

WEAKNESSES

- Bus-only; no ERP or CCTV
- Depends on subscription volume

– **Prama Hikvision** indirect · threat high ● Publicly observed | S89 | S140

Mumbai · Hikvision's Indian joint venture; dominant camera brand in Indian distribution · Through distributors; entry cameras ₹2,500 to ₹20,000

STRENGTHS

- Scale and dealer depth
- Face-recognition cameras at commodity prices

WEAKNESSES

- ER-01 and STQC scrutiny of Chinese-origin models
- No school software

– **Realtime Biometrics (via HBS Automation)** indirect · threat low ● Publicly observed | S87

New Delhi · Marketplace terminals · ₹20,500 per device (T501 on IndiaMART)

STRENGTHS

- Cheap, offline terminals

WEAKNESSES

- No integration; per-device attendance

– **Truein** indirect · threat medium ● Publicly observed | S84

Pune · Enterprise and school staff attendance; ISO 27001 and SOC 2 · ₹290 to ₹390 per user per year; USD 4 to 6 per user plus a ₹69,000 base on another listing

STRENGTHS

- Security attestations schools will ask Rax for
- Per-user price that makes staff attendance trivial to add

WEAKNESSES

- Staff-focused; student attendance at gate scale unproven

– **Airtel Xsafe** substitute · threat low ● Publicly observed S171

New Delhi (Bharti Airtel) · Wi-Fi cameras with Airtel cloud storage and installation in 40-plus cities including Chennai · ₹999 a year per camera plus ₹699 per additional camera; cameras ₹2,499 to ₹4,499

STRENGTHS

- Telecom brand, doorstep installation, cloud retention without an NVR
- Very low entry price for pre-schools and small schools

WEAKNESSES

- Home-oriented; no audio-visual classroom estate design or 15-day retention guarantee for a CBSE campus
- No school software

– **Frappe Education (ERPNext)** substitute · threat low ● Publicly observed S96

Mumbai (open source) · Open-source ERP for academic institutes; hosted on Frappe Cloud; Indian IT shops implement it · Free software; implementation and hosting paid

STRENGTHS

- Zero licence cost for a school with IT capacity
- Accounting-grade ledger

WEAKNESSES

- Needs an implementer; no parent app polish; no safety hardware

– **In-house builds by school chains (Sri Chaitanya, K12 Techno/Orchids)** substitute · threat medium

● Publicly observed S108 S111

Hyderabad, Bengaluru · Chains with 75,000 to 650,000 students run their own technology subsidiaries · Internal cost

STRENGTHS

- Central IT teams and PE funding
- Control of data and pricing

WEAKNESSES

- Closed to outside ERP vendors; may still buy hardware

– **Spreadsheets, WhatsApp groups and Tally** substitute · threat high ● Inferred

None · The default in most of the 3.4 lakh private schools below 300 students · Effectively free

STRENGTHS

- No training, no vendor, no subscription
- Parents already on WhatsApp

WEAKNESSES

- No audit trail, no consent management, no compliance record for CCTV or bus rules

– **State and central government platforms (Sampoorna, Shaala Darpan, EMIS, AP face attendance)**

substitute · threat high ● Verified S46 S47 S48 S49

State governments, NIC, C-DAC, KITE · Mandatory in government and aided schools of Kerala, Rajasthan, all KVs and NVs, Tamil Nadu; AP face attendance for 1.67 lakh teachers · Free to schools

STRENGTHS

- Zero price and mandatory use
- Owned by the buyer's regulator

WEAKNESSES

- Not available to private unaided schools
- Usability complaints (Bihar, UP)

– **AIS-140 VLT device makers on the ARAI list** partner-competitor · threat medium ● Verified S29 S91

Across India · About 90 approved manufacturers on the January 2026 ARAI list · ₹6,000 to ₹11,000 per device

STRENGTHS

- Legal compliance that Rax lacks
- Data feeds ZenCampus could consume

WEAKNESSES

- Commodity margins; many sell direct to bus operators

– **iDream Education (ICT-scheme vendor)** partner-competitor · threat low Publicly observed S98

Gurugram · Sells ICT labs, smart classrooms and tablets to states under Samagra Shiksha ICT grants · Scheme grant ceilings (₹2.40 lakh and ₹6.40 lakh per school)

STRENGTHS

- Knows state PAB and GeM procurement
- Could carry a campus-safety layer into state bids

WEAKNESSES

- Content-led; competes for the same GeM budget

– **Local CCTV and low-voltage dealers (SBM Technologies-type, Chennai)** partner-competitor · threat medium

Publicly observed S89

Chennai and every district town · Install 16-camera school systems for ₹75,000 to ₹1,40,000; sell CP Plus and Hikvision · ₹9,000 (2 cameras) to ₹1,40,000 (16 cameras) installed

STRENGTHS

- Already inside the school and trusted by the principal
- Same-day service

WEAKNESSES

- Cannot offer software; would resell an ERP for margin

– **Staqu Technologies (JARVIS)** partner-competitor · threat low Publicly observed S173

Gurugram · 200-plus clients claimed; state police, retail, manufacturing and a university · Quote-based

STRENGTHS

- Runs on any camera brand, which is the EVA pitch
- Government and enterprise references

WEAKNESSES

- No school ERP or parent app
- Not positioned for K-12 budgets

– **Videonetics** partner-competitor · threat medium Publicly observed S172

Kolkata · Indian video management and analytics vendor sold through system integrators; education campus solution page · Quote-based, integrator-led

STRENGTHS

- Indian-made VMS with education references (IIT Delhi, about 300 cameras)
- Face attendance and campus vehicle tracking in one platform

WEAKNESSES

- Higher-education and enterprise focus; no K-12 ERP
- Integrator-dependent, priced for large campuses

07 Pricing and unit economics

KEY TAKEAWAYS

- Thirty-four observed price points across five categories: ERP per school runs ₹5,000 to ₹1.4 lakh a year, ERP per student ₹85 to ₹500 a year, bus tracking ₹225 to ₹8,000 per bus a month, CCTV ₹25,000 to ₹1.4 lakh per campus, face attendance ₹290 per user a year. Publicly observed S64 S76 S79 S81 S84 S89 S92
- Rax's three prices (₹10 per student, ₹1,00,000 per licence, custom quote) contradict each other and none states a period or scope. Rax-supplied S3 Publicly observed S1 S9
- A 1,000-student CBSE school with 10 buses represents about ₹6 to 9 lakh of first-year spend across ERP, cameras and tracking, with ₹2 to 4 lakh recurring; software alone is under a fifth of it. Estimated S64 S79 S81 S89
- Cost to serve is unknown inside Rax (no COGS, margin or receivables data); the plan only works if hardware installation margin funds the service visits that the software price cannot. Rax-supplied S7 Recommendation
- Government price ceilings are visible in awards: ₹30,000 per school in Karnataka, ₹41,000 per camera over five years in Delhi, ₹2.40 lakh per smart classroom under Samagra. Estimated S40 S43 Verified S36

Observed price points

The full list with URLs and dates is in `data/prices.json` and renders as a ladder below. The pattern by category:

CATEGORY	LOW	TYPICAL	HIGH	WHAT IS INCLUDED	LABEL
ERP per school per year	₹5,000 (VigoCamp); ₹9,000 flat (EduGradUP)	₹72,000 (Campus 365 Lite) to ₹85,000 (Fedena Standard)	₹1.44 lakh (Fedena Ultimate)	Unlimited users, cloud hosting, apps; support level varies	Publicly observed: S64, S76, S92, S179
ERP per student per year	₹85 (Fedena at 1,000 students)	₹130 to ₹180 (e-School ERP)	₹500 (aggregator upper bound for Entab-class)	Modules, parent app; SMS and gateways extra	Publicly observed: S60, S64, S93
Staff attendance	₹290 per user per year (Truein)	₹390 per user (Truein Advanced) on phones; ₹4,699 (Hikvision) to ₹10,500 (eSSL) per face terminal	₹20,500 (Realtime T501) to ₹27,645 (ZKTeco SpeedFace-V5L) per terminal	Software on a phone kiosk versus a wall terminal with face, card and fingerprint	Publicly observed: S84, S87, S174, S175, S176
Bus tracking	₹225 per bus per month (SIM only) plus ₹4,000 device	₹4,000 per bus per month mid-tier; or ₹1,000 per school per month software plus device	₹6,500 per bus per month premium; ₹30 per student per month	Device, SIM, parent app, alerts; AIS-140 adds ₹8,500 per device	Publicly observed: S79, S80, S81, S91
CCTV per campus	₹25,000 (CP Plus 16-camera package, bare)	₹1.07 lakh (16 cameras installed with NVR, storage, UPS)	₹1.4 lakh and above (IP, PoE, PTZ)	Cameras, recorder, storage, cabling, installation; AMC extra; cloud alternative ₹999 a year per camera (Airtel Xsafe)	Publicly observed: S89, S90, S171

Two structural facts stand out. Software is cheap and flat: Fedena's unlimited-user plan means a 2,000-student school pays ₹42 a student and Campus 365 charges the same ₹5,999 a month regardless of size below 300 students.

Publicly observed S64 S76 Hardware is where money moves: a 10-bus fleet on a mid-tier subscription costs ₹4.8 lakh a year, more than five ERP licences, and a 16-camera fit-out is a one-time ₹1.07 lakh with a service tail. Publicly observed S81 S89

Estimated S81 S89

Rax current pricing and inconsistencies

The decks say "from ₹10 per student", rising as AI features are enabled, with smart-campus hardware, installation and support "scoped after a campus assessment"; the deck audit fixed this as the approved fact. Rax-supplied S3 S6 The site shows no number: a 30-day free demo, then Professional and Enterprise editions on custom quote with GST extra and biometric and RFID add-ons. Publicly observed S1 The IndiaMART storefront lists the older Smart School ERP at ₹1,00,000 per piece with a one-

year licence. Publicly observed S9 The ₹10 figure has no period: at ₹10 per student per year a 1,000-student school pays ₹10,000, a tenth of Fedena and unserviceable; at ₹10 per student per month it pays ₹1.2 lakh, in line with Entab-class pricing. Estimated S3 S64 Rax must pick one and publish it. Recommendation

₹1.07 lakh

Installed cost of a 16-camera school CCTV system in Chennai in 2026, roughly what a CBSE school spends to satisfy clause 4.7.10; it is more than a year of ERP subscription at any incumbent's price. Estimated S89

Price architecture options

ARCHITECTURE	HOW IT WORKS	FITS WHICH SEGMENT	EVIDENCE IT WORKS	LABEL
Per student per year, modular	Core at one rate, attendance and transport modules as add-ons	Mid and large private schools, CBSE groups	Entab, Vidyalaya, e-School ERP all price this way	Publicly observed: S60, S93, S133
Flat per school per year	One price, unlimited users	Small schools under 500 students; resellers	Fedena, Campus 365	Publicly observed: S64, S76
Hardware free, subscription per bus	Vendor funds devices, recovers through monthly fees	Transport-heavy schools	NeoTrack's model; needs capital	Publicly observed: S81
Hardware plus AMC	One-time installation, annual maintenance at 8 to 12 percent	CCTV, campus IoT	Every CCTV dealer; Delhi tender budgeted five years' maintenance	Publicly observed: S89; Verified: S40
Per bus per month bundled with software	School pays per bus, parents' app included	Small fleets	Mid-tier vendors at ₹3,000 to ₹5,000 per bus	Publicly observed: S81
Charged to parents per student	Transport app fee passed through fees	Budget schools with fee caps	MyClassAdmin at ₹30 per student per month	Publicly observed: S80

For Rax the workable structure is three lines: a per-student annual software fee with the ERP core, attendance and parent app included; a per-campus hardware and installation price with an AMC; and a per-bus monthly fee for tracking that consumes the school's existing AIS-140 device feed where one exists. Recommendation The first pilot should be priced at Fedena parity for software so that the comparison is on the integrated layer, not on the licence. Recommendation

Cost to serve and margin hypotheses

Nothing is known about Rax's cost of goods, margin, receivables or support cost; the internal record contains no cost data for any product. Rax-supplied S7 Unknown What can be reasoned: a per-student software fee at ₹100 to ₹150 a year on a 1,000-student school yields ₹1 to 1.5 lakh, which pays for perhaps four to six on-site visits a year at Chennai engineer rates; the ATM business shows Rax's installations generate frequent support calls, so the software margin alone will not fund the service model. Rax-supplied S7 Estimated S64 For the plan to work, hardware installation must carry at least the 25 to 35 percent gross margin that CCTV dealers imply when they price a 16-camera system at ₹75,000 to ₹1.4 lakh against component costs of ₹25,000 to ₹60,000, and the AMC must be sold at signing. Estimated S89 S90 Recommendation

Subsidy and scheme effects

No scheme pays a private school for ERP, CCTV or bus tracking; the buyer pays from fees, which fee-regulation acts in Tamil Nadu, Gujarat, Punjab and Uttar Pradesh cap or index. Publicly observed S58 Verified S36 In government schools the scheme money buys hardware at fixed ceilings (₹2.40 lakh per school for two smart classrooms, ₹6.40 lakh for an ICT lab, ₹30,000 per school for Karnataka CCTV, about ₹41,000 per camera over five years in Delhi) through GeM, and the software is free from the state. Verified S36 S40 S43 The effective price of ZenCampus to a government buyer is therefore zero for the ERP and the GeM L1 price for any camera or device, which Rax's Chennai-built hardware would have to meet against Chinese-origin OEMs. Inferred

Tender pricing dynamics

School technology tenders are L1 goods bids: a Kendriya Vidyalaya in Bhopal bought 993 items of cameras, recorders, cabling, switches and a rack in one GeM bid open for one day, with the value in the document. Verified S51 State CCTV programmes budget per school or per camera and award to integrators; Delhi's ₹597.51 crore was split into execution, five-year maintenance and leased lines, so bidders competed on total cost of ownership, not camera price. Verified S40 GeM catalogue prices for cameras and recorders set the reference, and MII (local content) preference applies, which is where Rax's own manufacture could matter if its cameras or gateways were BIS-registered and ER-01 certified. Verified S122

Rax-supplied S7 Inferred The cost of entering a tender is itself a price signal: Gujarat's state CCTV rate contract charged a ₹17,700 bid fee, demanded a ₹20 lakh EMD and a ₹15 crore three-year turnover, and Gujarat's school-MIS RFP asked for a ₹6 lakh EMD and CMMI level 3. Verified S167 S168 Past award prices for a school ERP could not be found; the 51 school-software tenders counted for 2026 sit behind aggregator paywalls. Publicly observed S52 Unknown

Payment terms and receivable risk

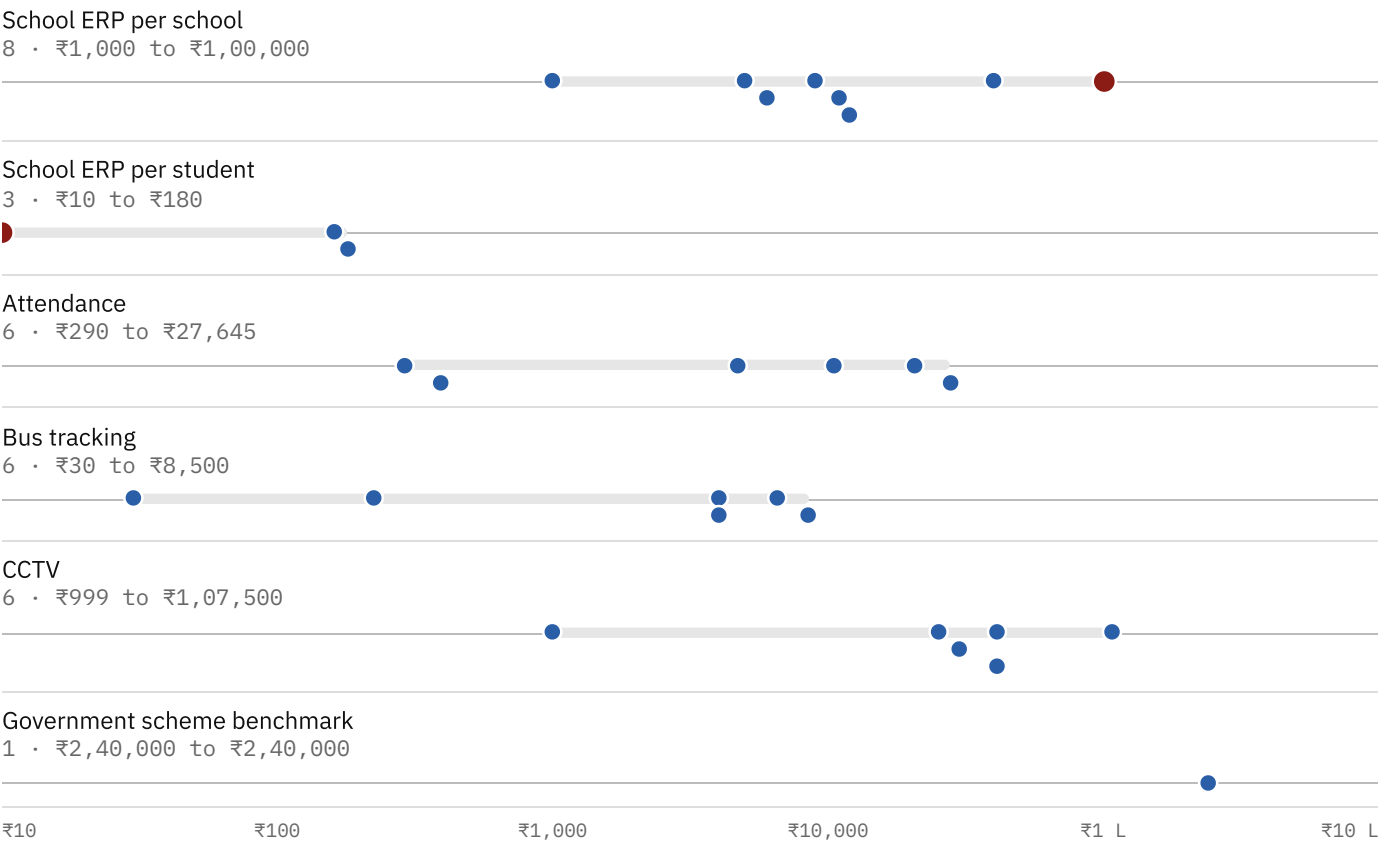
Private schools collect fees in three or four instalments and buy technology between March and June; annual software is normally paid in advance, hardware on delivery with 10 to 20 percent retention until commissioning. Inferred Budget private schools under fee caps are the highest receivable risk, as the pandemic-era fee disputes showed; chains and CBSE groups pay on contract; government buyers pay on GeM terms after inspection, which for an unproven vendor means months of working capital. Publicly observed S58 Verified S51 Inferred Rax's largest-account collapse in FY2025-26 shows its exposure to a few accounts; school pricing should therefore be annual in advance for software and milestone-based for hardware.

Rax-supplied S7 Recommendation

SO WHAT FOR RAX

Publish one price list before the first pilot: software at Fedena parity per student, hardware at dealer parity per campus with an AMC, transport per bus per month. Without it every conversation starts with a credibility problem.

Recommendation



● Rax ● Observed market price — Observed range

Log scale, INR. Hover or tap a point for item, vendor, basis and date; every point is listed in the table below.

CATEGORY	ITEM	PRICE	BASIS	EVIDENCE
Attendance	Time Capture plan, face recognition on phone or tablet Truein (Techjockey listing)	₹290 per user per year	published 2026-09-15	 Publicly observed S84
Attendance	Truein Advanced plan Truein (Techjockey listing)	₹390 per user per year	published 2026-09-15	 Publicly observed S84
Attendance	Hikvision DS-K1T320MFWX face recognition terminal Digital Automation, Vadodara (IndiaMART)	₹4,699 per terminal	observed 2026-09-15	 Publicly observed S174
Attendance	eSSL face recognition attendance system Precision Pro Secure, Ahmedabad (IndiaMART)	₹10,500 per terminal	observed 2026-09-15	 Publicly observed S175
Attendance	Realtime T501 face recognition attendance terminal HBS Automation (IndiaMART)	₹20,500 per device	observed 2026-09-15	 Publicly observed S87
Attendance	ZKTeco SpeedFace-V5L face and fingerprint terminal AmpleTrails (authorised distributor)	₹27,645 per terminal	published 2026-09-15	 Publicly observed S176
Bus tracking	Transport app charged per student MyClassAdmin (IndiaMART)	₹30 per student per month	published 2026-09-15	 Publicly observed S80
Bus tracking	Data SIM for a GPS device, midpoint of ₹150 to ₹300 ProSchool360	₹225 per bus per month	estimated 2026-09-15	 Estimated S79

CATEGORY	ITEM	PRICE	BASIS	EVIDENCE
Bus tracking	Standard AVL GPS device with SIM slot, lower bound ProSchool360 (any Indian GPS vendor)	₹4,000 per bus one-time	published 2026-09-15	Publicly observed S79
Bus tracking	Mid-tier school bus tracking subscription, midpoint of ₹3,000 to ₹5,000 NeoTrack (market ranges)	₹4,000 per bus per month	estimated 2025-09-18	Estimated S81
Bus tracking	Premium AIS-approved tracking subscription, midpoint of ₹5,000 to ₹8,000 NeoTrack (market ranges)	₹6,500 per bus per month	estimated 2025-09-18	Estimated S81
Bus tracking	AIS-140 approved VLT device, midpoint of ₹6,000 to ₹11,000 Fleetx (market guide)	₹8,500 per device	estimated 2026-09-15	Estimated S91
CCTV	Airtel Xsafe cloud camera plan, one camera, annual Bharti Airtel	₹999 per camera per year	published 2026-09-15	Publicly observed S171
CCTV	CP Plus 16-camera package with DVR/NVR, lower bound CP Plus dealers (price guide)	₹25,000 per package	published 2025-04-02	Publicly observed S90
CCTV	Karnataka government school CCTV sanction, ₹10 crore for 3,333 schools Karnataka Department of Education	₹30,000 per school	estimated 2018-09-01	Estimated S43

CATEGORY	ITEM	PRICE	BASIS	EVIDENCE
CCTV	Delhi government classroom CCTV programme, all-in per camera (₹597.51 crore for 1.46 lakh cameras including five-year maintenance and leased lines) Delhi PWD (tender estimate)	₹40,925 per camera over five years	estimated 2018-05-16	 Estimated S40
CCTV	8-camera setup complete, midpoint of ₹32,000 to ₹50,000 SBM Technologies, Chennai	₹41,000 per site installed	estimated 2026-05-29	 Estimated S89
CCTV	16-camera school or multi-floor setup complete, midpoint of ₹75,000 to ₹1,40,000 SBM Technologies, Chennai	₹1,07,500 per campus installed	estimated 2026-05-29	 Estimated S89
Government scheme benchmark	Samagra Shiksha smart classroom grant, two classrooms per school, non-recurring Ministry of Education	₹2,40,000 per school	published 2025-01-10	 Verified S36
School ERP per school	Standard plan, web app, unlimited users Fedena	USD 999 per institute per year	published 2026-09-15	 Publicly observed S64
School ERP per school	ProSchool360 Premium including GPS integration and parent app ProSchool360	₹1,000 per month per school	published 2026-09-15	 Publicly observed S79
School ERP per school	Ultimate plan, web app, 59 modules Fedena	USD 1,699 per institute per year	published 2026-09-15	 Publicly observed S64

CATEGORY	ITEM	PRICE	BASIS	EVIDENCE
School ERP per school	VigoCamp starting price VigoCamp (Techjockey listing)	₹5,000 per year	published 2026-09-15	 Publicly observed S92
School ERP per school	Lite plan, under 300 students, billed yearly Campus 365	₹5,999 per month	published 2026-09-15	 Publicly observed S76
School ERP per school	EduGradUP flat plan, all 43 modules EduGradUP	₹9,000 per school per year	published 2026-05-11	 Publicly observed S179
School ERP per school	Vedcool starting price Vedcool (Techjockey listing)	₹11,000 per licence	published 2026-09-15	 Publicly observed S92
School ERP per school	Shineing School ERP starting price Shineing (Techjockey listing)	₹12,000 per year	published 2026-09-15	 Publicly observed S92
School ERP per school	E-School ERP starting price E-School ERP (Techjockey listing)	₹40,000 per licence	published 2026-09-15	 Publicly observed S92
School ERP per school	SMART SCHOOL ERP Software, one-year licence Rax-Tech International (IndiaMART)	₹1,00,000 per licence per year	published 2026-09-15	 Publicly observed S9
School ERP per student	Teachmint starting price as listed Teachmint (Software Finder listing)	USD 5 per user per year	observed 2026-04-22	 Publicly observed S67
School ERP per student	ZenCampus core platform entry price Rax Tech International	₹10 per student (period not stated; read as per year)	published 2026-07-11	 Rax-supplied S3 S6
School ERP per student	Classter example, 1,000-student institution, core plus academics Classter	EUR 21.5 per active student per year	published 2026-08-03	 Publicly observed S95

CATEGORY	ITEM	PRICE	BASIS	EVIDENCE
School ERP per student	e-School ERP, schools up to 500 students (lower bound) Imran Malik School Management Software (G2)	₹160 per student per year	published 2026- 09-15	Publicly observed S93
School ERP per student	Classunify starting price Classunify (Techjockey listing)	₹180 per month	published 2026- 09-15	Publicly observed S92

08 Channels and go-to-market

KEY TAKEAWAYS

- Two salespeople with no referral base cannot cold-call 3.4 lakh schools; the routes that fit are direct to Chennai CBSE groups, through CCTV dealers who already service campuses, and conversion of the 300 legacy users. ● Rax-supplied S6 S7 ● Recommendation
- Seventeen named intermediaries are assessed: dealer, association, white-label, marketplace, tender and group-entity routes; only dealers and associations put Rax in front of a principal at low cost. ● Publicly observed S65 S89 S145 S148
- Tenders and GeM are hardware-only for this product: KVs and states buy cameras as goods bids at L1; the software is free from the state. ● Verified S47 S48 S51
- Rax's earlier channel-partner and digital-marketing failures were for ATM products sold to integrators; a school dealer programme differs because the dealer already has the customer and needs a software margin. ● Rax-supplied S7 ● Inferred
- Buyers find vendors through referrals, Play Store ratings, marketplace listings and Sahodaya events, not through advertising; the proof asset that matters is a named school. ● Publicly observed S61 S148 S150

Every route, assessed

ROUTE	INTERMEDIARY OR MECHANISM	ECONOMICS	CYCLE	WHAT RAX MUST PROVIDE	EVIDENCE IT WORKS IN THIS CATEGORY	VERDICT	LABEL
Direct to school groups	Correspondents and group IT heads in Chennai (Velammal, Vels, PSBB, Chettinad, DAV)	Per-student software plus hardware per campus; no commission	3 to 6 months, March to June window	Reference, price list, demo tenant, DPDP data map	Skolaro's 13-institution trust; Vidyalaya's six-school operator	First route	Publicly observed: S73, S133; Recommendation
Existing-account expansion	300 legacy Smart School Campus users	Upgrade price; zero acquisition cost	Weeks, if the list exists	The list, a migration tool, a reason to upgrade	Standard SaaS practice; no Rax evidence	Do first	Rax-supplied: S6; Recommendation
CCTV and low-voltage dealers	Chennai dealers of CP Plus and Hikvision (SBM Technologies-type); eSSL and Matrix dealers	15 to 25% software margin plus their own hardware margin	Ongoing; they sell at every inspection	Dealer kit, training, tier-2 support, lead registration	eSSL routes all support through dealers; Fedena and Campus 365 run reseller programmes	Second route	Publicly observed: S65, S76, S85, S89
White-label and OEM	Fedena OEM programme, Campus 365 partner plan (as a supplier of the ERP core to Rax, or Rax supplying analytics to them)	Licence share	Months	An integration or a decision to stop building an ERP	Both programmes are public and used by resellers	Option to evaluate	Publicly observed: S65, S76
Associations and clusters	Chennai Sahodaya (300-plus CBSE schools), Tamil Nadu Nursery Primary Matric HS and CBSE Schools Association, Federation of Associations of Private Schools in TN, ARISE (1,800 schools, ₹1 lakh a year), NISA (budget schools)	Membership or sponsorship; access to principal conclaves	Event-driven	A talk on clause 4.7.10 and DPDP compliance, not a product pitch	Sahodaya runs principal conclaves and award functions; ARISE runs a principal forum	Third route	Publicly observed: S112, S145, S146, S148

ROUTE	INTERMEDIARY OR MECHANISM	ECONOMICS	CYCLE	WHAT RAX MUST PROVIDE	EVIDENCE IT WORKS IN THIS CATEGORY	VERDICT	LABEL
Software marketplaces	SoftwareSuggest (Basic listing about USD 4,000 for six months), Techjockey, Capterra, G2, TradeIndia, IndiaMART (Rax's existing inbound)	Listing fees or per lead	Continuous	Reviews, a published price, screenshots	Vidyalaya has 487 reviews on SoftwareSuggest; Rax already gets inbound from IndiaMART	Maintain, low cost	Publicly observed: S71, S150, S151; Rax-supplied: S7
App stores	Google Play and App Store parent apps	Free	Continuous	A native app with a rating; today a PWA	CampusCare 124K reviews, MCB 60K, Uolo 38K; ratings are read by principals	Prerequisite	Publicly observed: S61, S137, S138
Tenders and GeM	State CCTV programmes (TN, Karnataka, Maharashtra), KV and NV per-school GeM goods bids, state IT agencies	L1 goods pricing; 30 to 90 day payment	6 to 18 months for programmes; days for GeM bids	BIS-registered, ER-01 certified cameras and devices; GeM catalogue; MII certificate	KV Bhopal bid of 993 items; Delhi ₹597 crore programme; TN ₹21 crore	Hardware only, after certification	Verified: S40, S42, S51, S122
Government schemes and agencies	Samagra Shiksha ICT and PM SHRI through state implementation societies; iDream-class vendors	Grant ceilings per school on GeM	Annual PAB cycle	Computing hardware, not ZenCampus	1.46 lakh smart classrooms sanctioned; all ICT through GeM	Not a fit	Verified: S36, S37
System integrators	NIC and C-DAC for KVS and NVS; state IT agencies (ELCOT-type)	Subcontract	Long	Empanelment	KV Shaala Darpan built by NICSI	Closed	Verified: S49
Telematics partners	AIS-140 device makers on the ARAI list; LocoNav; NeoTrack	Data-feed integration or co-sell	Months	An API consuming AIS-140 feeds	LocoNav sells AIS-140 school kits; NeoTrack has 650 schools	Integrate, do not compete	Verified: S29; Publicly observed: S81, S82
Education exhibitions	DIDAC India (school owners and principals)	Stand cost	Annual	Demo and references	Visitor profile is owners and principals	Optional, year two	Publicly observed: S149
Export via group entities	iibdaei (Dammam) and Gulf Connect (Muscat)	Distribution margin	12 to 24 months	Arabic UI, NOOR or KHDA integration, hosting, an Indian reference	Saudi dossier: conditional; Dubai bus rules exist	After an Indian reference	Rax-supplied: S11; Verified: S104, S105

Named intermediaries assessed

- Chennai Sahodaya Schools Complex: 300-plus CBSE schools, principal conclaves, award functions; the cheapest way to stand in front of every target principal in one room. Publicly observed S148
- Tamil Nadu Nursery, Primary, Matric, Higher Secondary and CBSE Schools Association: represents private managements to the state; a venue for compliance briefings. Publicly observed S146
- Federation of Associations of Private Schools in Tamil Nadu: the other state-level management body. Publicly observed S146 S147
- ARISE (formerly FICCI ARISE): 1,800 premium schools nationally; ₹1 lakh a year; a national principal forum, better suited to year two. Publicly observed S144 S145
- NISA: budget private schools; relevant only for the ₹1,000-a-month tier. Publicly observed S112
- SBM Technologies-type Chennai CCTV dealers: install 16-camera systems at ₹75,000 to ₹1.4 lakh and hold the AMC; the natural reseller of a compliance layer. Publicly observed S89

7. CP Plus and Prama Hikvision distributors: every dealer buys from them; a programme with the distributor reaches hundreds of dealers. Publicly observed S88 S140
8. eSSL and Matrix dealer networks: biometric and access-control dealers who already sell attendance terminals to schools. Publicly observed S85 S86
9. Fedena OEM programme: an ERP core under Rax's label if Rax decides its own ERP cannot reach parity. Publicly observed S65
10. Campus 365 partner programme: same option at the budget tier. Publicly observed S76
11. LocoNav and the ARAI AIS-140 manufacturers: the legal tracking feed ZenCampus should consume. Verified S29
Publicly observed S82
12. NeoTrack: the dominant Tamil Nadu bus vendor; a co-sell or integration partner rather than a target. Publicly observed S81
13. SoftwareSuggest, Techjockey, Capterra and G2: review marketplaces where every competitor is listed and Rax is not. Publicly observed S71 S92 S150
14. IndiaMART and TradeIndia: Rax's current inbound source; 547 school-software listings compete there at ₹2,500 to ₹55,000. Rax-supplied S7 Publicly observed S151
15. GeM: mandatory for all ICT procurement by government schools and the route for KV and state hardware bids; requires a service or product catalogue and, for cameras, BIS and ER-01 compliance. Verified S36 S51 S122
Publicly observed S152
16. DIDAC India: the annual owner-and-principal exhibition. Publicly observed S149
17. iibdaei and Gulf Connect: the group's GCC entities; no sales yet; the Saudi dossier sets the gates. Rax-supplied S7 S11

Procurement mechanics

Private schools buy on a quotation, a demo and a reference call; groups issue a comparison sheet and negotiate a per-student rate; the CBSE inspection and the RTO fitness certificate are the documents that force a date. Verified S20 S31 Inferred

Government CCTV programmes run as state tenders with an estimate per school, five-year maintenance and internet lines built into the price (Delhi's ₹597.51 crore split into ₹384.85 crore execution, ₹57.69 crore maintenance and ₹154.97 crore leased lines), while KVs buy through GeM goods bids using catalogue item names, open for as little as a day, with EMD and MII conditions. Verified S40 S51 Pass 2 opened three state procurement documents, and they settle the question of whether Rax can bid. Verified S167 S168 Publicly observed S169

DOCUMENT	WHAT IT BUYS	KEY ELIGIBILITY CLAUSES	CAN RAX QUALIFY TODAY	LABEL
Gujarat Council of School Education, RFP SSA/2022-23/VSK (May 2023, on GeM)	Upgrade of state school MIS, including a School Management System and a Vehicle Tracking System for School Transport	Seven years in business; average IT turnover ₹3 crore a year; 25 IT employees; three e-governance projects; CMMI level 3; EMD ₹6 lakh	No: no CMMI, no e-governance projects, software turnover far below ₹3 crore	Verified: S167
Gujarat Informatics, IP CCTV rate contract HWT18092024 (September 2024)	IP cameras, recorders, cabling and maintenance for government offices	One project of 1,000 IP cameras or two of 750 in five years; OEM authorisation; Gujarat office; ₹15 crore turnover over three years; OEM seven years in India; STQC or CERT-In security test report; EMD ₹20 lakh	Turnover yes (₹47.51 crore across FY2020-21 to 2022-23, the period the bid names); the IP-camera project reference and ER test report are Unknown or absent	Verified: S168; Rax-supplied: S7
Samagra Shiksha Axom, Shiksha Setu 2.0 EOI (March 2026, World Bank)	State governance platform with multi-modal attendance including facial recognition	CMMI level 3; five years on multilateral or government-funded projects; education-system implementations; facial recognition only after legal review with opt-in consent	No	Publicly observed: S169

Government school software is therefore bought as a state platform from large IT firms, and government cameras as rate contracts from integrators with big references; neither is a route for ZenCampus in the next 36 months. Inferred Pilot-to-scale paths exist in the government decks' "pilot cluster to district" narrative, but no state has run a private-vendor ERP pilot that was found. Rax-supplied S4 Unknown

What Rax tried before and why this differs

Rax has tried digital-marketing agencies and channel partners with their own sales teams; both failed, and referrals are dead. Rax-supplied S7 Those attempts sold ATM and e-surveillance products to integrators who resold to banks, a market where the integrator owns the bank relationship and squeezes the OEM. The school dealer route differs in two ways that must be stated honestly: the CCTV dealer already has the school and needs a recurring line, so the incentive runs toward Rax; and the product is sold on a compliance date, so the dealer has a reason to raise it. Inferred Digital marketing is not re-proposed; review-marketplace listings and Play Store ratings are, because that is where school buyers look. Publicly observed S61 S71

Recommendation

Sales motion and enablement for a two-person team

The motion is: identify the 300 legacy users and call every one; select ten Chennai CBSE groups and secure three paid pilots priced at Fedena parity; recruit two Chennai CCTV dealers as installation and AMC partners; speak once at a Chennai Sahodaya conclave on clause 4.7.10 and DPDP. Recommendation Proof assets required before the first meeting: a one-page price list, a demo tenant with the school's own data loaded, a DPDP consent flow and data map, an AIS-140 integration note, a camera and storage bill of materials for a 200-camera campus, and a reference letter from the first pilot. Recommendation The pilot design is in section 12; its purpose is to produce the reference that every route above depends on. Recommendation

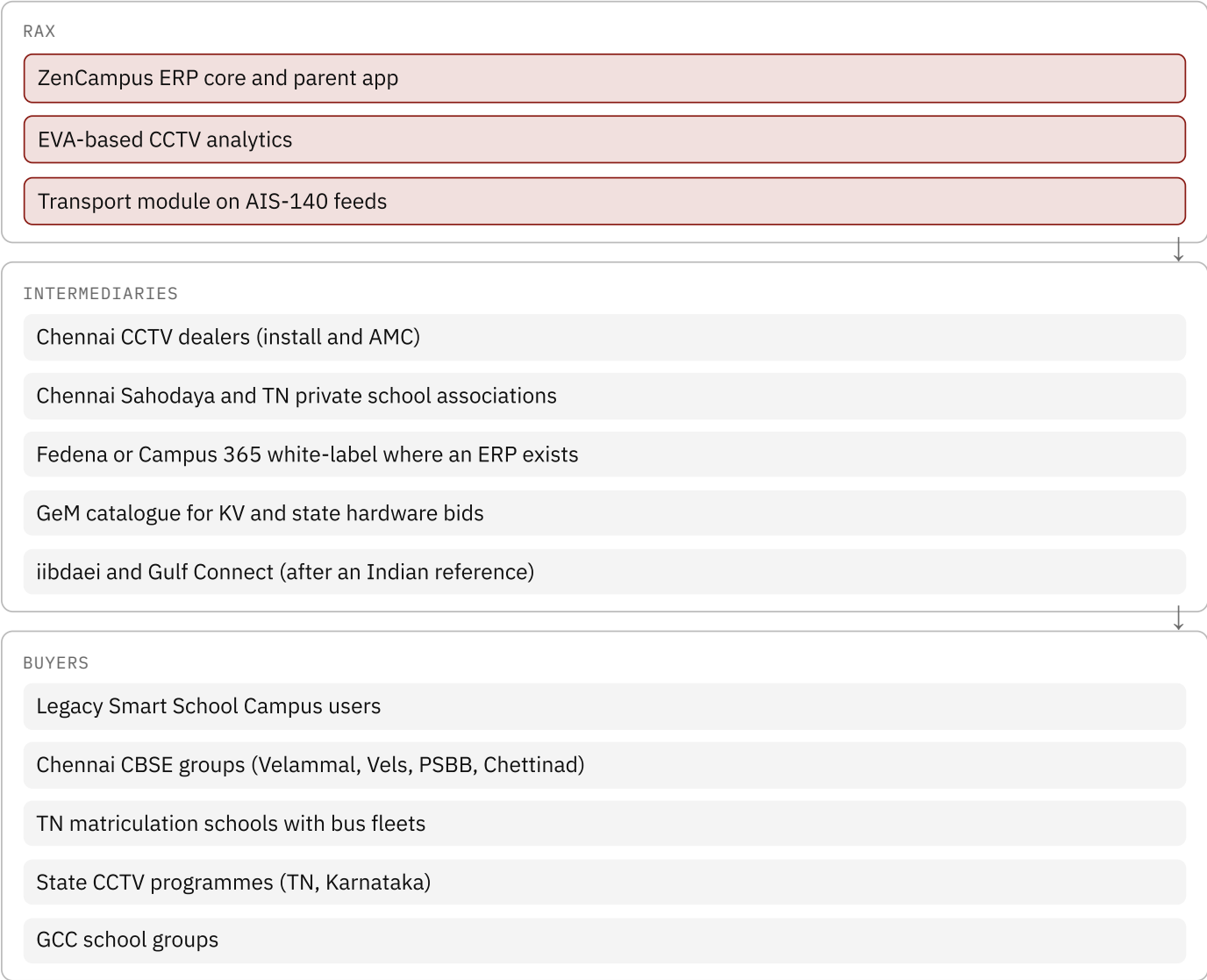
Marketing that matches how buyers find suppliers

Principals search "school ERP", read Play Store ratings and review sites, ask peers at Sahodaya meetings, and take dealer advice at inspection time; the evidence is the review counts (CampusCare 124K, MCB 60K, Uolo 38K, Vidyalaya 487 on SoftwareSuggest), the association calendars, and Rax's own inbound from IndiaMART. Publicly observed S61 S71 S137 S138 S148 Rax-supplied S7 Marketing spend should therefore go to a native parent app, marketplace listings with real reviews, a compliance guide for CBSE schools, and Sahodaya sponsorship, in that order. Recommendation

SO WHAT FOR RAX

Treat the Chennai CCTV dealer as the sales force Rax cannot hire: he is inside the school before every inspection, and a 20% software margin costs Rax less than a third salesperson. Recommendation

Routes to market that fit two salespeople



Three routes are viable in the first year: direct to Chennai CBSE groups, through CCTV dealers who already service the campus, and conversion of the legacy base; tenders and the GCC follow a reference. ● Recommendation

09 Geographic priorities

KEY TAKEAWAYS

- Tamil Nadu first: 11,890 private unaided schools averaging 507 students, 96% online, a state CCTV programme and a bus directive, all within a day's drive of Medavakkam. Verified S12 S31 S42
- Karnataka, Telangana and Andhra Pradesh are the second ring: 47,000 private schools and 1.5 crore private students, but Hyderabad is the home of the strongest incumbents. Verified S12 Publicly observed S74 S108
- Delhi has the largest schools (715 students on average) and the highest fees, and is Entab's home market; it is a later expansion, not a start. Verified S12 Publicly observed S58 S60
- Export through the group entities is a GCC school-transport and ERP story that needs Arabic, NOOR integration and local hosting; the July 2026 Saudi dossier already rates the product "conditional". Rax-supplied S11
Verified S104 S105
- Sequence: Chennai and Coimbatore pilots, then Tamil Nadu districts and Puducherry, then Bengaluru; the GCC only after an Indian reference exists. Recommendation

India: states ranked

The tile map in `data/geography.json` scores fifteen states and Puducherry on five factors: private unaided school count and average size, fee capacity and metro density, state mandate and scheme activity for CCTV, GPS and attendance, private-school digital readiness, and proximity to Chennai for a company with two salespeople and no field network. Estimated S12 The evidence behind the top ranks follows.

STATE	PRIVATE UNAIDED SCHOOLS (2024-25)	PRIVATE UNAIDED STUDENTS	AVERAGE SIZE	PRIVATE SCHOOLS ONLINE	SCHOOLS OVER 500 STUDENTS	SCORE	LABEL
Tamil Nadu	11,890	60.3 lakh	507	96.4%	11.4%	92	Verified: S12
Karnataka	19,105	56.6 lakh	296	83.4%	6.0%	78	Verified: S12
Telangana	12,474	47.5 lakh	381	89.3%	9.2%	72	Verified: S12
Andhra Pradesh	15,473	47.0 lakh	304	100%	6.2%	70	Verified: S12
Maharashtra	18,746	65.4 lakh	349	93.5%	9.6%	66	Verified: S12
Delhi	2,637	18.9 lakh	715	100%	48.3%	62	Verified: S12
Kerala	3,018	16.9 lakh	559	98.8%	24.1%	60	Verified: S12
Uttar Pradesh	1,04,508	2.21 crore	212	59.2%	5.6%	55	Verified: S12

The table uses 2024-25 counts; the 2025-26 booklet, checked in pass 2, shows the same order: Tamil Nadu 11,683 private unaided schools with 62.0 lakh students (average 531), Karnataka 19,351, Telangana 13,245, Andhra Pradesh 15,710 and Puducherry 318, and Tamil Nadu's share of schools above 500 students at 11.5%. Verified S13 Tamil Nadu ranks first on every factor except raw count. Its private unaided schools are the largest among the big states, almost all are online, the state has revived a CCTV programme for 4,200 government high and higher secondary schools after a ₹21 crore first phase, and the Transport Department's April 2024 directive requires GPS, CCTV and female helpers on every school bus with details uploaded to the department. Verified S12 S31 S42 The Chennai region also holds the CBSE groups (Velammal with more than a lakh students, DAV, PSBB, Chettinad and others) that are the named research targets in section 05. Publicly observed S109 Two

cautions apply: the Tamil Nadu Schools (Regulation of Collection of Fee) Act 2009 fixes maximum fees by district for three years, which limits what a school can pass on, and the state's central scheme money is shrinking while it stays outside PM SHRI.

Publicly observed S58 Verified S130

Karnataka has more private schools than Tamil Nadu but smaller ones, a lower share online, and a ₹10 crore state CCTV programme for 3,333 government schools; Bengaluru's international and CBSE schools are dense and reachable in a day.

Verified S12 S43 Telangana and Andhra Pradesh have 28,000 private schools between them and full internet coverage in Andhra Pradesh, but Hyderabad is home to MyClassboard (1,200-plus schools), Next Education and the Sri Chaitanya and Narayana chains, which run their own systems, and Andhra Pradesh's government already runs face attendance for 1.67 lakh teachers. Verified S12 S46 Publicly observed S70 S74 S108 Maharashtra's CCTV mandate after Badlapur is the strongest state-level CCTV driver outside CBSE, but the state is 1,300 km away. Verified S44 S45

Delhi is the richest market per school: average private school size of 715, 48.3% of all schools above 500 students, fees of ₹1 to 4 lakh, and a government CCTV programme of ₹597.51 crore; it is also Entab's home and the most contested.

Verified S12 S40 Publicly observed S58 S60 Uttar Pradesh has 1,04,508 private schools and 2.21 crore private students, the largest base by far, but they average 212 students, only 59% are online, and the 2024 teacher revolt against app attendance shows the operating conditions. Verified S12 S57 Kerala's private unaided sector is small and its aided sector runs on the free Sampoorana system. Verified S12 S48

Cities within the first ring, in order of service reach from Medavakkam: Chennai and its suburbs (Tambaram, Medavakkam, OMR corridor, Mogappair), Kancheepuram and Thiruvallur districts, Puducherry (160 km), Vellore, Coimbatore (500 km, home of NeoTrack), Madurai, Trichy, then Bengaluru (350 km). Publicly observed S81 S109 Inferred Rax's existing e-surveillance accounts are in Mumbai (16), Delhi (8), Chennai (4), Bengaluru (3) and Kerala (2), which does not help: they are ATM integrators, not school dealers. Rax-supplied S7

Export

The GCC is the only export route with a group entity behind it. Dubai has 227 private schools with 387,441 students (2024-25) and school transport there has required GPS on every bus since the 2015 bylaw, with CCTV and 3+2 seating enforced through RTA fines (1,642 buses fined in one campaign); newer standards specify seven cameras per bus. Verified S104 S105

Publicly observed S106 S119 Saudi Arabia has 7,337 private schools, 3,062 of them international, and private schools exchange enrolment, attendance and grades with the Ministry's NOOR system, so any ERP must integrate with it; the July 2026 IIBDAEI dossier concluded the product was concept-level for Saudi buyers and set gates of Arabic and right-to-left UI, PDPL data mapping, Saudi hosting, documented APIs and a pilot on two campuses of a group such as Ataa or NCLE.

Rax-supplied S11 Publicly observed S107 Oman (Gulf Connect) has one OEM client and no school evidence was collected; Europe (RaxTech Europe, Warsaw) is out of scope for a K-12 product built for Indian boards. Rax-supplied S7 Unknown

The export requirements are therefore: Arabic and RTL interface, KHDA or ADEK and NOOR data exchange, in-country hosting (Saudi PDPL) or at least a documented transfer basis, a local integrator for bus hardware to RTA specifications, and a reference deployment in India to show. None exists today. Rax-supplied S11 Inferred

Europe, through RaxTech Europe in Warsaw, is not a route for ZenCampus in the planning horizon. The entity has traded since November 2025 without a sale, no evidence of European demand for an Indian school ERP or campus IoT stack surfaced in this study, and the gates would be heavier than in the GCC: GDPR with its stricter rules on children's data and biometric processing, local-language interfaces, national school information systems, and CE marking for any camera or gateway, which Rax does not hold. Rax-supplied S7 Inferred Europe should be revisited only if an Indian reference and a CE-marked analytics unit both exist; until then RaxTech Europe's effort belongs to products with existing certification paths. Recommendation

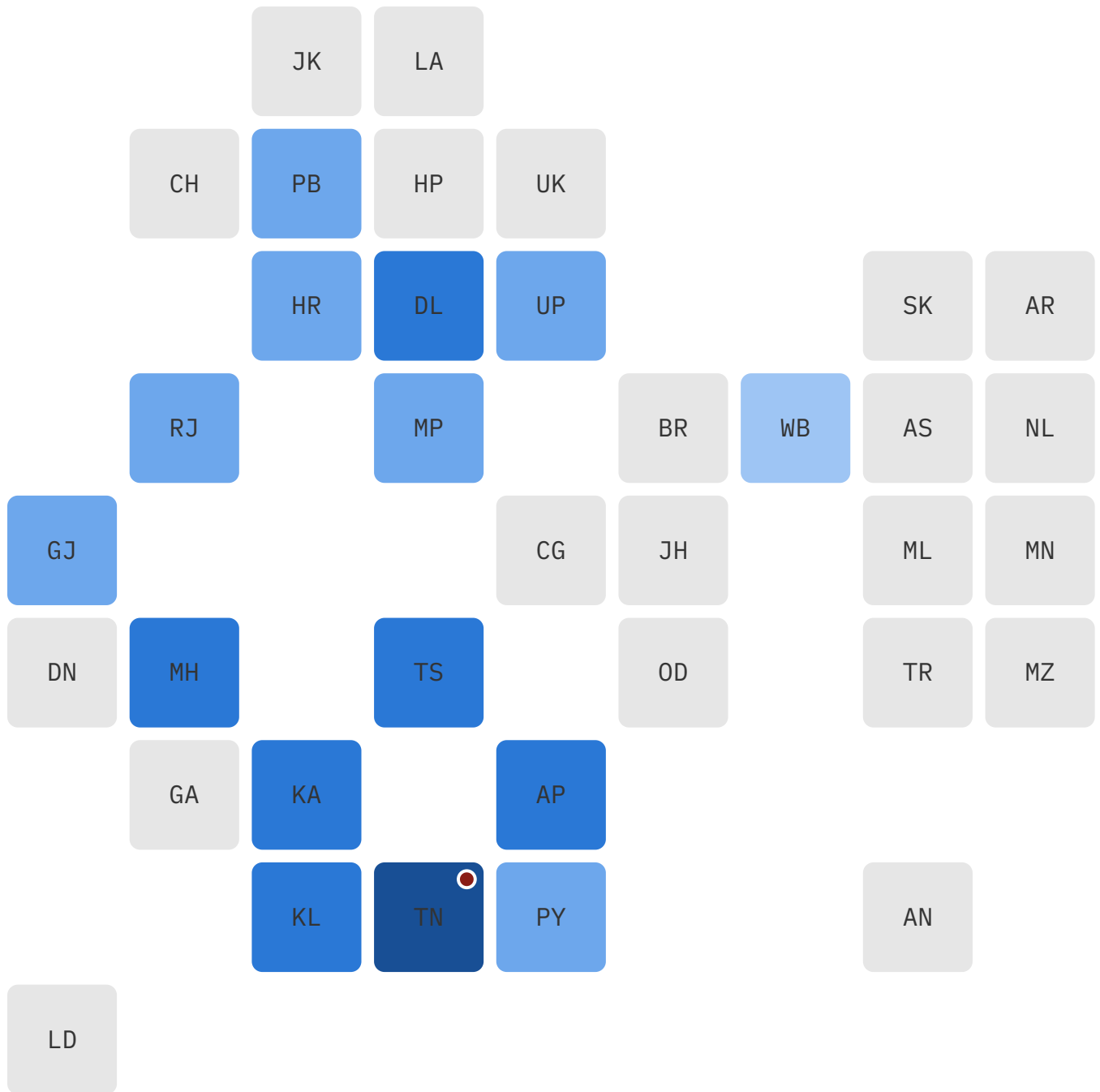
Sequence

First, Chennai: three pilot schools within 30 km of the office, chosen for CBSE affiliation and a bus fleet, so that clause 4.7.10 and the bus directive are both in play. Second, Tamil Nadu districts and Puducherry through the groups that already span them (Velammal spans nine districts). Third, Bengaluru through a CCTV-dealer partner once the pilot reference exists. The trigger for each step is a signed reference and a service partner in the next city, not a sales target. Recommendation The GCC waits for an Indian reference, an Arabic build and the readiness gates in the Saudi dossier. Rax-supplied S11 Recommendation

SO WHAT FOR RAX

Geography argues for a Tamil Nadu-only plan for twelve months: it is the one state where the mandates, the school size, the connectivity and the service radius all line up, and where a failed installation can be fixed the same day.

● Recommendation



- 1. TN Tamil Nadu 92**
 11,890 private unaided schools with 60.3 lakh students (average 507 per school, the highest among large states); 96.4% of private schools online; 11.4% of all schools above 500 students; state CCTV programme for 4,200 government schools and a 2024 bus directive on GPS, CCTV and female helpers; home state, service reach by road
- 2. KA Karnataka 78**
 19,105 private unaided schools with 56.6 lakh students (average 296); 83.4% online; Bengaluru is a five-hour drive; ₹10 crore CCTV programme for 3,333 government schools; dense CBSE and international-school market
- 3. TS Telangana 72**
 12,474 private unaided schools with 47.5 lakh students (average 381); 89.3% online; Hyderabad hosts Sri Chaitanya, Narayana, MyClassboard and Next Education, so incumbents are strong
- 4. AP Andhra Pradesh 70**
 15,473 private unaided schools with 47.0 lakh students (average 304); 100% online; the state already runs face-recognition attendance for 1.67 lakh teachers, so government demand is served; private chains headquartered in Vijayawada and Guntur
- 5. MH Maharashtra 66**
 18,746 private unaided schools with 65.4 lakh students (average 349); 93.5% online; CCTV made mandatory after Badlapur (2024) and a state GR of May 2025; 1,300 km from Chennai

6. DL Delhi 62

2,637 private unaided schools with 18.9 lakh students (average 715, the largest schools in India; 48.3% of all Delhi schools exceed 500 students); 100% online; fee levels ₹1 to 4 lakh; Entab's home market; government CCTV programme of ₹597.51 crore

7. KL Kerala 60

3,018 private unaided schools with 16.9 lakh students (average 559); 98.8% online; 24.1% of schools above 500 students; aided sector dominant and served by the free Sampoorana system

8. PY Puducherry 58

311 private unaided schools with 1.42 lakh students (average 458); 99% online; 160 km from Chennai; small but serviceable pilot territory

9. UP Uttar Pradesh 55

1,04,508 private unaided schools with 2.21 crore students, the largest base, but average 212 students and only 59.2% online; Samagra's largest recipient (₹6,264 crore FY25); teachers forced suspension of digital attendance in 2024; 1,800 km from Chennai

10. GJ Gujarat 52

13,190 private unaided schools with 44.8 lakh students (average 339); 96.2% online; fee ceilings of ₹15,000 to ₹27,000 under the 2017 Act limit willingness to pay

Tile cartogram, priority score 0 to 100; darker is higher. The red dot marks Chennai. Score weights: private unaided school count and average size (30), fee capacity and metro density (20), state scheme or mandate activity for CCTV, GPS and attendance (20), digital readiness of private schools (internet share, 10), proximity to Chennai for a two-person team with no field service network (20). Counts are UDISE+ 2024-25 Table 3.5 and 5.4; internet share is Table 7.11 (private unaided column); share of schools above 500 students is Table 2.3.

KEY TAKEAWAYS

- Thirty-four sourced signals in `data/quotes.json` from Play Store reviews, teacher protests, officials, a state assembly reply, a Rajya Sabha answer, tender clauses, principals and vendors; the loudest theme is attendance apps that fail in the field. Publicly observed S54 S55 S61
- Parents punish friction, not features: forced logins, monthly updates, data use and PDF errors dominate 124,000 CampusCare reviews. Publicly observed S61
- Principals buy support before price ("what a School will require the most is SUPPORT"). Publicly observed S133
- Officials buy CCTV to monitor and to be seen to monitor; they name chief education officers, live feeds and retention periods, which are the tender clauses. Publicly observed S40 S42
- No public signal about Rax or ZenCampus exists: no review, no complaint, no reference. Unknown

What buyers complain about

The strongest voice is the government teacher forced onto an attendance app. In Bihar, headmasters told Scroll that "We open the app and just stare at it as the loading sign keeps on turning and turning", that the app placed them "12,000 metres away" while sitting in the office, and that it failed "more than 90% of the time"; a teacher with 31 years' service asked for a biometric terminal instead because "we don't need to be reliant on network for that". Publicly observed S54 In Uttar Pradesh the head of the Lucknow primary teachers' association said "the online digital attendance system is not working well and due to this the teachers are not able to register attendance within the given time", the state relaxed the window within days and suspended the order on 16 July 2024. Publicly observed S55 Verified S57 These are exactly the failure modes of a face-attendance product at a school gate: network, timing, location accuracy and punishment.

Teachers who live close by can easily skip classes by just logging into the app, and others can come within the given radius, give their attendance and go back home. So this app is not solving any problems.

Anil Kumar Roy, education activist, Bihar, to Scroll.in, 7 November 2024 Publicly observed S54

Parents complain about the app as a chore. On the CampusCare listing, the top recent reviews say the app "is good for fee payment but very very very bad in some cases. Each and every time we need to log in to open the app which consumes internet and moreover every month we have to update it", that PDF downloads fail and the app crashes, and that "it's monopoly with the schools & parents have little choice". Publicly observed S61 The MCB parent app's 3.2-star rating across 60,000 reviews says the same in numbers. Publicly observed S137 Reviewers of Teachmint report crashes during online tests and no local office; a Vidyalaya reviewer reports slowness, bugs and slow support. Publicly observed S67 S68 S71

Officials and legislators add the enforcement voice. Answering the Maharashtra assembly in December 2025, the school education minister counted CCTV in 29,049 private and 60,049 local body schools and promised "strict monitoring" of the rest, after opposition members pressed on the pace. Publicly observed S164 In the Rajya Sabha the Education Minister answered privacy concerns about student IDs by saying APAAR enrolment "is voluntary and consent based", while CBSE's own circular makes the ID mandatory for Class IX and XI registration; schools are left to manage that tension, and a vendor that holds consent records helps them do it. Verified S170 S155 Tamil Nadu's transport commissioner has for years published failure counts from pre-reopening bus inspections, 1,263 vehicles in one 2019 round. Publicly observed S161

What buyers say they want

Principals and trustees want support and continuity. "Regardless of Price & features, what a School will require the most is SUPPORT", says a CBSE principal in Vadodara on Vidyalaya's site; a Kolkata trustee with 13 institutions and 20,000 students praises "outcomes and benefits"; a Goa school praises "saving our valuable time as well as paper".

Publicly observed S64 S73 S133 Transport buyers want accuracy and legality: "Best in tracking, better in AIS140 especially", writes a LocoNav customer, and NeoTrack's own buyer checklist asks how often GPS updates, whether attendance is automated and what the hidden SIM and maintenance fees are. Publicly observed S81 S82 Officials want oversight: Tamil Nadu's official

says "all the CCTV footage will be closely monitored by chief education officers", and Delhi's minister promised parents "user ID and password for the classroom of their child" with 30-day storage. Publicly observed S40 S42 The Tamil Nadu Teachers Welfare Association supported CCTV to "curtail violent activities in the school campus". Publicly observed S42

Requirements observed in rules and procurement, clause by clause

SOURCE	CLAUSE-LEVEL REQUIREMENT	IMPLICATION FOR ZENCAMPUS	LABEL
CBSE bye-laws clause 4.7.10 (21 July 2025)	High-resolution CCTV with real-time audio-visual recording at gates, classrooms, corridors, stairs, labs, libraries, canteens, playgrounds, stores; toilets excluded; minimum 15 days' retention; footage to authorities on request	Storage sizing for audio-video, a retention log, an export function	Verified: S20
CMVR rule 125H and AIS-140	VLT device with emergency button, ARAI type approval, state backend	Integrate approved devices; do not sell GT-500M as compliance	Verified: S25, S28, S29
Tamil Nadu directive, April 2024	GPS and CCTV on buses, female helpers, driver experience and police record, details uploaded	Bus roster, driver records and upload-ready reports	Verified: S31
DPDP Rules, rule 10 and Fourth Schedule	Verifiable parental consent; schools and transport providers exempt for safety tracking only; commencement 13 May 2027	Consent register, purpose limitation, deletion, breach process	Verified: S33
MeitY ER-01 and BIS CRO	Only ER-compliant, registered cameras saleable after 1 April 2026	Camera bill of materials must be certified models	Verified: S122, S123
Delhi CCTV tender (2018)	30-day storage, parent live feed, five-year maintenance, leased lines	Government bids are total-cost-of-ownership bids	Verified: S40
KV GeM bid GEM/2025/B/6833509	Catalogue items: camera V3, recorder V2, Cat-6, switch, rack; one-day window	GeM catalogue presence is a precondition	Verified: S51
CBSE registration circular, 15 September 2025	APAAR ID mandatory for every Class IX and XI registration; OASIS data updated first; upload under the principal's Aadhaar e-signature	An ERP that exports clean, consented student records saves the school a registration-season chore	Verified: S155
Gujarat school MIS RFP SSA/2022-23/VSK	CMMI level 3, ₹3 crore average IT turnover, 25 IT staff, three e-governance projects	State software tenders are closed to Rax	Verified: S167
Gujarat Informatics CCTV rate contract HWT18092024	1,000-camera reference, OEM authorisation, STQC or CERT-In security test report, local office	Government camera supply needs certified OEM hardware and a large reference	Verified: S168
Assam Shiksha Setu 2.0 EOI	Facial recognition attendance only after legal review and opt-in consent; offline sync	Consent and offline operation are now written into tenders, not just DPDP	Publicly observed: S169

Signals about Rax specifically

None were found. Searches for "Rax Tech Smart School Campus", "ZenCampus", the demo tenant name and the Rax IndiaMART listings returned only Rax's own pages; the IndiaMART storefront's ten reviews concern exit signs and remote terminal units, not school software. Publicly observed S9 Unknown The absence is itself a signal: the product has no public footprint to be complained about or recommended.

Patterns and what they imply

Four patterns cut across the signals. First, reliability under real conditions beats features: teachers and parents describe loading times, wrong locations, forced logins and update sizes, never module counts. Publicly observed S54 S61 Second, the app is the product: a school is judged by its parents on the parent app, so a PWA without a store rating starts behind. Publicly observed S61 S137 S138 Third, buyers want a person, not a portal: "SUPPORT", "office in Kerala", "problem solution"

recur. Publicly observed S68 S133 Fourth, compliance language is precise and dated: officials and rules speak in retention days, device standards and inspection dates, and a vendor who speaks the same language gets the meeting.

Verified S20 S31 Inferred

For positioning this means ZenCampus should be presented as the compliance record and the service promise (same-day Chennai support, a named engineer), not as an AI vision; for product it means a native parent app, an attendance path that works offline and on a wall terminal as well as a camera, and honest claims. Recommendation

SO WHAT FOR RAX

The Bihar and Uttar Pradesh attendance revolts are the cheapest product research Rax will ever get: build face attendance to work when the network does not, and never tie a penalty to it. Recommendation

- THEMES Attendance app failure6 Government CCTV demand4 Tender clause3 Parent app friction2
- Vendor lock-in2 Product reliability2 Support over price2 Bus tracking expectations2
- Government intent for attendance technology1 Group buyer1 Time saved1 Price pressure1
- Digitisation trigger1 Willingness to pay1 Local presence1 Enforcement pressure1
- Student data consent1 Portal data burden1 Bus fitness enforcement1

The app is good for fee payment but very very very bad in some cases. Each and every time we need to log in to open the app which consumes internet and moreover every month we have to update it and it consumes a lot of data.

Munmun Mallick, parent reviewer · Google Play review of CampusCare (Entab) · 2026-04-15 · source Publicly observed S61

Parent app friction

sometimes when downloading a file it takes little bit more time than other apps and sometimes downloading PDF it shows error while downloading and also takes a lot of time to download PDFs. the app crashes sometimes. the app UI should be improved.

Sourav Mandal, reviewer · Google Play review of CampusCare (Entab) · 2026-07-10 · source Publicly observed S61

Parent app friction

Unfortunately it's monopoly with the schools & parents have little choice.

Parent reviewer · Google Play review of CampusCare (Entab), as surfaced in search · 2026 · source Publicly observed S61

Vendor lock-in

Updates are important to have new information, technology, features, etc. our motive is to make the app more effective and user-friendly.

Entab Infotech (vendor reply) · Google Play developer response · 2026-04-17 · source Publicly observed S61 Vendor lock-in

We open the app and just stare at it as the loading sign keeps on turning and turning. Instead of giving our attendance and starting other work, we end up stressing over the app and fearing punishment.

Headmaster and teachers' association leader, Bihar (anonymous) · Scroll.in report on the e-Shikshakosh app · 2024-11-07 · source Publicly observed S54 Attendance app failure

When I'm right here in the office, it will say I am 12,000 metres away and this happens to almost every teacher in my school.

Headmaster, Bihar (anonymous) · Scroll.in report on the e-Shikshakosh app · 2024-11-07 · source Publicly observed S54
Attendance app failure

They can instead have the biometric system. That can track our timings and we don't need to be reliant on network for that.

Teacher with 31 years' service, Bihar (anonymous) · Scroll.in report on the e-Shikshakosh app · 2024-11-07 · source Publicly observed S54
Attendance app failure

Teachers who live close by can easily skip classes by just logging into the app, and others can come within the given radius, give their attendance and go back home. So this app is not solving any problems.

Anil Kumar Roy, education activist, Bihar · Scroll.in report on the e-Shikshakosh app · 2024-11-07 · source Publicly observed S54
Attendance app failure

The teachers are troubled because the online digital attendance system is not working well and due to this the teachers are not able to register attendance within the given time.

Sandeep Kumar, President, Lucknow Metropolitan Primary Education Association · ANI, quoted by Business Standard · 2024-07-09 · source Publicly observed S55
Attendance app failure

We are implementing such digital initiatives to curb absenteeism and neglect of duty. Ensuring teachers are present and accountable will help improve the overall educational environment and learning outcomes for students.

Senior official, Uttar Pradesh basic education department · India Today · 2024-07-14 · source Publicly observed S56
Government intent for attendance technology

If required all the CCTV footage will be closely monitored by chief education officers and concerned officials.

Senior official, Tamil Nadu School Education Department · DT Next · 2024-01-22 · source Publicly observed S42
Government CCTV demand

Installing CCTV cameras will help curtail violent activities in the school campus.

K Ganapathy, Tamil Nadu Teachers Welfare Association · DT Next · 2024-01-22 · source Publicly observed S42
Government CCTV demand

Parents will be provided user ID and password for the classroom of their child for viewing the video feed on their phone through a mobile app. The storage of video recording of each camera will be available for 30 days at school-level.

Satyendar Jain, PWD Minister, Delhi · Press Trust of India via NDTV · 2018-05-16 · source Publicly observed S40
Government CCTV demand

Some of my students have complained that the app crashed during the test they were taking and time ran out, so they couldn't restart and complete it.

Teacher reviewer · Software Finder review of Teachmint · 2023-04-01 · source Publicly observed S67 Product reliability

However, some users have reported that the system can occasionally be slow and buggy, and customer support can be slow in responding to issues.

Verified reviewer · SoftwareSuggest review of Vidyalaya School ERP · 2024 · source Publicly observed S71 Product reliability

Regardless of Price & features, what a School will require the most is SUPPORT & Vidyalaya provides us with that.

Ms. Suprabha Menon, Principal (CBSE), Navrachana Education Society, Vadodara · Vidyalaya customer testimonial · undated · source Publicly observed S133 Support over price

Our trust runs 13 schools and colleges in which approximately 20,000 students are enrolled. We are very happy with the outcomes and benefits of using Skolaro.

Krishna Damani, Trustee, South Point Education Society, Kolkata · Skolaro customer testimonial · undated · source Publicly observed S73 Group buyer

Fedena has simplified our admission procedures, data management process, data accessibility and communication between the stakeholders thereby saving our valuable time as well as paper.

Vidya Vikas Academy, Goa · Fedena customer testimonial · undated · source Publicly observed S64 Time saved

Best in tracking, better in AIS140 especially. App UI gives great user experience, unlike other competitors this app is clean and gives accurate information.

Dhinakaran S, customer · LocoNav school-bus page review · undated · source Publicly observed S82 Bus tracking expectations

NeoTrack offers the hardware free for schools, so that schools only handle the subscription, which is transparent and competitive compared to what you'd pay other providers.

Mohamed Anosh, NeoTrack · NeoTrack blog on GPS tracker cost · 2025-09-18 · source Publicly observed S81 Price pressure

A 'temporarily down' GPS for weeks is a violation of the state school bus rule and the Supreme Court directions on school bus safety. Send the school an email with 5 dated screenshots, give 7 days, and in parallel file a complaint at the RTO.

Parent guide author · righttoinformation.wiki school bus complaint guide · 2026-09-01 · source Publicly observed S59
Bus tracking expectations

Until 2007 when the number of Sri Chaitanya institutions had grown to 70, the administrative and accounts systems were managed manually.

EducationWorld profile of the Sri Chaitanya group · EducationWorld · 2025-06-26 · source Publicly observed S108
Digitisation trigger

In Tier 1 and 2 cities, annual fees of reputable private schools now range between Rs.1 lakh and Rs.4 lakh, while in Tier 3 and 4 cities, they range between Rs.50,000 and Rs.2 lakh.

EducationWorld (citing surveys) · EducationWorld cover story on fee regulation · 2025-06-26 · source Publicly observed S58
Willingness to pay

Not having an office in Kerala, if I may say so :)

Principal, Kerala (Capterra reviewer who switched from CampusCare to MyClassCampus/Teachmint) · Capterra review of Teachmint · 2022 · source Publicly observed S68
Local presence

1. Training 2. Problem solution 3. Overall software is too good

Reviewer listing cons · Capterra review of Teachmint (MyClassCampus) · 2020 · source Publicly observed S68
Support over price

Regardless of how early teachers in his school came to work, the app only began to work properly around 10 am or 11 am.

Scroll.in, paraphrasing a teacher with 31 years' experience · Scroll.in report on the e-Shikshakosh app · 2024-11-07 · source Publicly observed S54
Attendance app failure

So far, the programme has resulted in CCTV systems being fitted in approximately 60,049 local body government schools and 29,049 private schools, covering a significant number of institutions statewide

Maharashtra School Education Minister Bhuse, replying in the state assembly · NDTV report of the assembly reply · 2025-12-11 · source Publicly observed S164
Government CCTV demand

Regional education offices had been instructed to expedite installation work urgently; there will be strict monitoring to ensure adherence to safety standards.

Maharashtra School Education Minister Bhuse, answering opposition members on the pace of implementation · NDTV report of the assembly reply · 2025-12-11 · source Publicly observed S164 Enforcement pressure

The APAAR ID enrolment is voluntary and consent based. The consent is provided by the parents/ guardians in case of school students.

Minister of Education, statement laid in reply to Rajya Sabha starred question 342 · Rajya Sabha · 2025-04-02 · source Verified S170 Student data consent

This year, APAAR ID of each student who will be registered for Class IX / XI is being made mandatory.

CBSE, instructions to affiliated schools · CBSE circular on registration data for 2025-26 · 2025-09-15 · source Verified S155 Portal data burden

About 1,263 vehicles failed to meet the standards prescribed in the Tamil Nadu Motor Vehicles (Regulation and Control of School Buses) Special Rules 2012.

C Samayamoorthy, Transport Commissioner, Tamil Nadu · The New Indian Express · 2019-05-23 · source Publicly observed S161 Bus fitness enforcement

Facial recognition usage must follow explicit legal review and opt in/consent policies.

Samagra Shiksha Axom, Department of School Education, Assam (EOI scope clause) · Shiksha Setu 2.0 EOI as summarised by The EduPress · 2026-03-22 · source Publicly observed S169 Tender clause

The CCTV Cameras should comply with the Requirements for security prescribed by MeitY to ensure the security of the CCTV systems at the time of supply.

Gujarat Informatics Limited, eligibility criterion 8 · Bid document HWT18092024 · 2024-09-18 · source Verified S168 Tender clause

The bidder should have valid CMMi level 3 or above certification as on the bid submission date.

Gujarat Council of School Education, Samagra Shiksha, pre-qualification criterion 5 · RFP No. SSA/2022-23/VSK · 2023-05-20 · source Verified S167 Tender clause

11 Risks and compliance

KEY TAKEAWAYS

- Fifteen risks registered; the two rated 5 on impact are that no ZenCampus sale or reference exists and a repeat of the service failures that stopped referrals in the ATM business. Rax-supplied S183 S6 S7
- Three regulatory gates are live or dated: AIS-140 approval for any tracker sold as compliance, ER-01 and BIS registration for cameras (sales bar since 1 April 2026), and DPDP child-data rules from 13 May 2027. Verified S29 S33 S158
- The credibility risk is self-inflicted and fixable: site claims that contradict the audit and three conflicting prices. Publicly observed S1 S9 Rax-supplied S6
- Dependencies on components, connectivity and partners are all unmanaged today: no certified camera list, no dealer, no AIS-140 integration. Unknown
- Early warnings to watch: pilot support tickets, app-store rating, dealer sign-ups, and the legacy-user response rate. Recommendation

Risk register

The register is in `data/risks.json` and renders below with a likelihood-impact matrix. The seven highest by product of likelihood and impact:

RISK	CATEGORY	L	I	MITIGATION	OWNER	LABEL
No sale of the current ZenCampus product and no reference	Product	5	5	Three paid pilots from the legacy base or Chennai CBSE schools before any wider selling	Sales	Rax-supplied: S183, S6
Service failures repeat the ATM reputation problem inside a tightly networked Sahodaya community	Operational	4	5	Dealer installation with SLA, named engineer, weekly pilot reviews, fix before scale	Operations	Rax-supplied: S7
Public claims contradict the audit (350+ institutions, 96% retention, three prices)	Reputational	4	4	Remove claims, publish one price list	Managing Director	Publicly observed: S1, S9
Bus tracking sold as compliance without AIS-140 approval	Regulatory	4	4	Integrate approved devices; state the supplementary role in writing	Engineering	Verified: S25, S29
Sales bandwidth diverted to the collapsing e-surveillance accounts	Operational	4	4	Ring-fence one salesperson for twelve months	Managing Director	Rax-supplied: S7
Cameras not BIS-registered and ER-01 certified	Regulatory	4	3	Sell certified models only; keep references in quotes	Operations	Verified: S122, S123
Face attendance fails in field conditions and triggers user revolt	Product	3	4	Offline-first, terminal fallback, no penalties, measured accuracy	Engineering	Verified: S54, S57

Compliance map

REQUIREMENT	APPLIES TO	STATUS AT RAX	LEAD TIME	GATE FOR WHICH SEGMENT	LABEL
CBSE clause 4.7.10: audio-visual CCTV, 15-day retention, footage on request	Every CBSE-affiliated school	Product must size storage and log retention; not designed yet	Product work, weeks	Segments 1, 2, 5	Verified: S20

REQUIREMENT	APPLIES TO	STATUS AT RAX	LEAD TIME	GATE FOR WHICH SEGMENT	LABEL
AIS-140 type approval (ARAI) for VLT devices with emergency button	Any device sold as the legal tracker on a permit bus	GT-500M not on the ARAI list	6 to 12 months for approval; or integrate an approved device now	Segments 1, 2, 3	Verified: S25, S29
Tamil Nadu bus directive: GPS, CCTV, helpers, driver records uploaded	Every Tamil Nadu school bus	Reports not built	Weeks	Segments 1, 2, 3	Verified: S31
DPDP Act section 9 and Rules 2025 (rule 10 consent, Fourth Schedule exemptions), commencing 13 May 2027	Any processing of children's data; schools exempt from consent only for safety tracking	"DPDP-ready" claimed; no data map or consent flow evidenced	Months; legal review	All	Verified: S32, S33
ISO 27001 or SOC 2 (buyer expectation, not law)	Cloud holding children's and fee data	Not held	9 to 12 months	Segments 2, 7, 8	Publicly observed: S84 [Unknown for Rax]
BIS CRO and ER-01 (STQC) for CCTV cameras and recorders	Any IP camera or recorder sold or imported; MeitY OM of 16 January 2026 bars non-ER sales from 1 April 2026; analog cameras exempt from the ER; state CCTV tenders demand the STQC or CERT-In test report	BIS CRS applied, in process; no ER-01 evidence	Testing weeks; licence months	Any hardware sale; all tenders	Verified: S122, S158, S159, S168 ● Rax-supplied S7
GeM catalogue and MII certificate	Government and KV hardware bids	No listing found	Weeks	Segments 6, 9	Verified: S51 ● Publicly observed S152
KHDA, RTA (Dubai) and NOOR (Saudi) integration; Saudi PDPL and hosting	GCC schools	None; Saudi dossier rates readiness conditional	12 to 24 months	Segment 8	Rax-supplied: S11 ● Verified S104 S105
CBSE APAAR ID and UDISE+ student data (circulars of 24 January and 15 September 2025)	Every CBSE school registering Class IX and XI students	No UDISE+ or APAAR export evidenced	Weeks of product work	Segments 1, 2, 4	Verified: S154, S155
MoE Guidelines on School Safety and Security 2021, as notified by states	Private school managements and school transport	Product can supply the audit trail; no mapping done	Weeks	Segments 1, 2, 3	Verified: S156
CMMI level 3 and e-governance project references	State school MIS and attendance platforms (Gujarat, Assam)	Not held; not planned	Years	Government software (excluded)	Verified: S167; Publicly observed: S169
ISO 9001:2015 with software scope	Tender eligibility, buyer comfort	Held since 22 September 2025	Done	All	Rax-supplied: S7

The reputation and quality constraint

The internal record is explicit: no one refers Rax, support calls are frequent including at installation, QC is sample-based, component dependency causes missed deliveries, and the largest accounts left over quality and service. ● Rax-supplied S7

Schools are a worse place to carry this than banks: Chennai's CBSE principals meet at Sahodaya conclaves, a parent app is rated in public, and the buyer's own words say support is what they buy. ● Publicly observed S133 S148 A failed first pilot would be

known across the segment within a term. The mitigation is structural, not promissory: dealer-based installation with an AMC, a named engineer per pilot, a public app rating that Rax watches weekly, and no second pilot until the first has a signed outcome letter. ● Recommendation

Dependencies

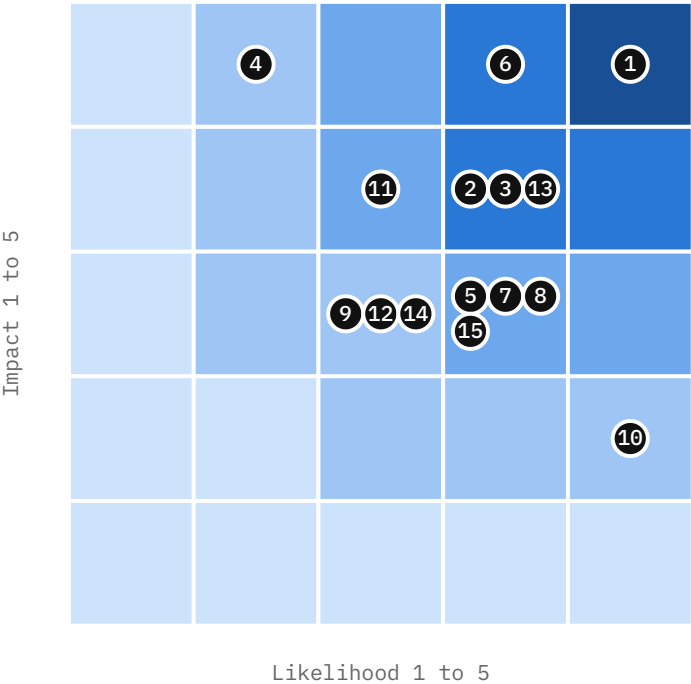
Components: cameras and recorders must be certified models, which narrows the supply to a shortlist of ER-compliant OEMs; GPS devices must be ARAI-approved; biometric terminals must be compatible. ● Verified S29 S122 Connectivity: 96.4% of Tamil Nadu private schools are online, but bus tracking rides on 4G SIMs at ₹150 to ₹300 a month and face attendance at a gate needs local processing when the link drops; the Bihar and Uttar Pradesh experiences show what network dependence does. ● Verified S12 S54 S57 ● Publicly observed S79 Partners: everything in section 08 depends on two dealers and one association that do not yet exist as relationships. ● Recommendation Scheme money: none flows to private schools; government hardware programmes are episodic and Tamil Nadu's central allocation is falling. ● Verified S36 S130

Early-warning indicators

Watch, monthly: legacy-user response rate (below 30% means the base is not convertible); pilot support tickets per campus per week (above five means the service model is failing); parent-app rating (below 4.0 after 500 reviews is the CampusCare warning line); dealer sign-ups (zero after 90 days means the channel thesis is wrong); AIS-140 integration status; the DPDP countdown to 13 May 2027; and any state or CBSE enforcement action under clause 4.7.10, which would accelerate demand. ● Publicly observed S61 ● Verified S33 ● Recommendation

SO WHAT FOR RAX

The only risk Rax controls completely is credibility: fix the site, publish the price and integrate an approved tracker before the first meeting, or every other mitigation is wasted. ● Recommendation



Numbers refer to the register below. Shade deepens with likelihood × impact.

#	RISK	L	I	MITIGATION
1	No sale of the current ZenCampus product and no named reference (AI version 0 users; legacy Smart School Campus 300 users); buyers will not sign without a school they can call product · owner Sales	5	5	Convert three legacy users or Chennai CBSE schools into paid, referenceable pilots before any wider selling ● Rax-supplied S183 S6

#	RISK	L	I	MITIGATION
2	Unreconciled site marketing (350+ institutions, 96% retention) and three different prices contradict the audit and Rax's statement that no ZenCampus sale has been made, and will be discovered by any buyer who searches reputational · owner Managing Director	4	4	Remove unsupported claims from zencampus.ai; publish one price list; state the legacy base honestly ● Publicly observed S1 S6 S9 S183
3	Bus-tracking sold as compliance when the GT-500M is not an ARAI-approved AIS-140 device regulatory · owner Engineering	4	4	Integrate approved device feeds; state in writing that ZenCampus supplements, not replaces, the AIS-140 device ● Verified S25 S29
4	Children's data breach or consent failure under the DPDP Act once rules commence on 13 May 2027; penalties up to ₹250 crore per contravention regulatory · owner Engineering	2	5	Data map, consent register, retention and deletion policy, breach process, ISO 27001 roadmap before May 2027 ● Verified S33 S35
5	Own or resold cameras not BIS-registered and ER-01 certified after 1 April 2026, blocking sale and tenders regulatory · owner Operations	4	3	Buy only certified camera models until Rax's own units pass STQC; keep the certificate references in every quote ● Verified S122 S158 S168
6	Service failures on the first school installations repeat the ATM-segment reputation problem and kill referrals in a tightly networked Sahodaya community operational · owner Operations	4	5	Dealer-based installation with SLA; named engineer per pilot; weekly pilot reviews; fix before scale ● Rax-supplied S7
7	Competitors give hardware free against subscription (NeoTrack) and price ERP flat (Fedena), making a hardware-plus-software bundle look expensive competitive · owner Sales	4	3	Price software at Fedena parity; consume existing devices; sell the compliance record, not the device ● Publicly observed S64 S81
8	Incumbent ERP holds the fee ledger and parent logins; migration cost and parent retraining block switches competitive · owner Product	4	3	Offer a compliance layer alongside the incumbent ERP; white-label or integrate rather than replace ● Publicly observed S61 S65
9	Fee-regulation acts in Tamil Nadu, Gujarat, Punjab and UP cap what schools can pass on, suppressing budgets in the matriculation segment market · owner Sales	3	3	Target CBSE schools with fees above ₹50,000; keep the budget tier at ₹1,000 a month software ● Publicly observed S58
10	Government and aided schools are closed to commercial ERP (state platforms) and buy hardware at L1 on GeM market · owner Managing Director	5	2	Treat government as a hardware-only, post-certification opportunity; do not build a bid team now ● Verified S47 S48 S49 S51
11	Face attendance fails in field conditions (network, lighting, timing) and triggers the user revolt seen in Uttar Pradesh and Bihar product · owner Engineering	3	4	Offline-first design, terminal fallback, no penalties tied to the system, measured pilot accuracy ● Verified S54 S57
12	Working capital: government and group buyers pay after inspection; a hardware-heavy bundle ties up cash the company no longer has after three years of decline financial · owner Finance	3	3	Annual software in advance; hardware on milestones; no government bids before 2028 ● Rax-supplied S7
13	Two salespeople are pulled back to the collapsing e-surveillance accounts and the school effort stalls operational · owner Managing Director	4	4	Ring-fence one person for schools for twelve months with named targets; dealer channel for reach ● Rax-supplied S7
14	One multi-campus group becomes the whole business and repeats the top-four-accounts concentration problem financial · owner Finance	3	3	Cap any single group at 40% of school revenue; keep the dealer channel alive ● Rax-supplied S7
15	Parent app remains a PWA with no store rating while every incumbent has a native app with tens of thousands of reviews product · owner Product	4	3	Ship native Android and iOS apps before the second pilot; collect reviews ● Publicly observed S2 S61 S137

12 Strategy and recommendation

KEY TAKEAWAYS

- The plan starts from zero: Rax has made no sales of the current ZenCampus product; the AI version has 0 users and the only live base is 300 legacy Smart School Campus users. ● Rax-supplied | S183 | S6
- Three options: sell the full smart-campus stack direct (Option A), become the compliance layer sold with and through CCTV dealers on top of any ERP (Option B), or license the ERP to a white-label partner and keep only the analytics hardware (Option C). ● Recommendation
- Option B is recommended: it fits two salespeople, uses the dated obligations that make principals sign, and does not require beating Entab or Fedena on their own ground. ● Recommendation
- Ninety days go to credibility (price list, site claims, AIS-140 integration, DPDP pack) and to three paid pilots; twelve months go to 25 campuses, two dealers and one group proposal, for about ₹40 to 60 lakh of mostly people-time against a 2027 revenue of about ₹1 crore. ● Recommendation ● Estimated | S89 | S122
- Kill criteria are explicit: no paid pilot by March 2027, a pilot app rating below 4.0, no dealer signed by June 2027, or a legacy-base response under 30%. ● Recommendation

Starting point

Every option below begins with no paying ZenCampus customer. Rax has made no sales of the current product; the audited base is 0 users on the AI version and 300 active users on the legacy Smart School Campus, whose definition of a user is unknown.

● Rax-supplied | S183 | S6 The public claims of 350-plus institutions and 96% retention are unreconciled marketing and cannot be used as proof in any proposal. ● Publicly observed | S1 ● Recommendation The first milestone of any option is therefore the first paid school, not market share.

Three options

	OPTION A: FULL STACK, DIRECT	OPTION B: COMPLIANCE LAYER WITH DEALERS	OPTION C: LICENSE THE ERP, KEEP THE HARDWARE
What is sold	14-module ERP plus all twelve smart-campus systems as one platform, hardware scoped per campus	CCTV record (clause 4.7.10), bus alerts on AIS-140 feeds, DPDP consent and parent app, with the ERP core as ledger; installed and serviced by dealers	ERP core white-labelled to Fedena- or Campus 365-class partners or to dealers; Rax sells EVA-based camera analytics and gateways only
To whom	Any private school	Chennai CBSE schools and groups, then matriculation schools with buses	Dealers and ERP vendors as OEM customers
Investment	Highest: field team, energy and water sensors, own trackers through ARAI, own cameras through STQC	Moderate: native apps, AIS-140 integration, compliance pack, dealer kit, certified camera shortlist	Lowest: API and licensing; certification of analytics hardware
Time to revenue	12 to 18 months; long cycles	6 to 9 months; pilots in the March to June window	9 to 12 months; partner-dependent
What must be true	Schools pay one vendor for everything; Rax can install and service statewide; the IoT layer works	Principals buy the compliance record; dealers want a software margin; the ERP is good enough as a ledger	A partner wants Rax's ERP; Rax's analytics beat Hikvision and CP Plus at certified prices
Evidence for and against	Against: no school has bought a full stack from anyone; NeoTrack and dealers own the hardware layer ● Publicly observed S81 S89	For: every mandate is dated; dealers already sell at inspection time; Fedena and Campus 365 prove reseller models ● Verified S20 S31 ● Publicly observed S65 S76	For: OEM programmes exist; against: the ERP has no scale advantage over Fedena's open core ● Publicly observed S64 S65
Verdict	Reject for now	Recommended	Hold as fallback if pilots fail

Option A loses because it asks the buyer to believe six unproven things at once and asks Rax to build a statewide field force it has never had. Rax-supplied | S7 Inferred A fourth route, selling ZenCampus into state school platforms, was considered and dropped: Gujarat and Assam tender those platforms to firms with CMMI level 3, multi-crore IT turnover and years of e-governance projects, none of which Rax holds. Verified | S167 Publicly observed | S169 Option C loses because a white-label ERP competes with a free open-source core and earns the least, and because it discards the one asset Rax has in schools, its Chennai presence. Publicly observed | S64 Option B wins because it sells what the inspection demands, on the date the inspection sets, through the person already in the school. Recommendation

Ninety-day plan

ACTION	OWNER	COST	MILESTONE	KPI
Identify and call all 300 legacy users; sign three paid pilots	Sales	Time	Day 45: list; day 90: three agreements	Response rate above 30%; three signed
Publish one price list; remove unsupported site claims	Managing Director	Nil	Day 15	Site and deck audit agree
Integrate one ARAI-approved AIS-140 device feed; write the supplementary-role note	Engineering	₹2 to 4 lakh	Day 60	Live feed in the demo tenant
Ship native Android and iOS parent apps	Engineering	₹5 to 10 lakh	Day 90	Store listings live
DPDP data map, consent flow, 15-day retention procedure, legal review	Engineering and counsel	₹2 to 3 lakh	Day 60	Compliance pack in every proposal
Recruit two Chennai CCTV dealers; agree margin and SLA	Sales	Margin	Day 90	Two agreements
Present at a Chennai Sahodaya conclave on clause 4.7.10 and DPDP	Managing Director	Sponsorship	Next conclave	Ten principal meetings booked
Cost the service model per 1,000-student campus	Finance	Time	Day 45	Gross margin per pilot known

Recommendation The plan's spend is under ₹20 lakh; its scarce input is one salesperson's full attention for ninety days. Estimated | S89

Twelve-month plan

By June 2027: three pilots complete with signed outcome letters and one public reference; 25 campuses live (legacy upgrades plus pilots plus dealer referrals); two dealers selling; one multi-campus group proposal submitted; a certified camera shortlist and, if the EVA-based analytics unit is to be sold as hardware, ER-01 testing started; a GeM catalogue entry only if a state programme appears in Tamil Nadu. Recommendation Costs: native apps and integrations ₹10 to 15 lakh, DPDP and ISO 27001 preparation ₹8 to 12 lakh, STQC testing for one camera model ₹5 to 10 lakh including BIS fees of ₹30,000 per application, dealer kit and Sahodaya sponsorship ₹5 lakh, one dedicated engineer ₹8 to 10 lakh: about ₹40 to 60 lakh. Verified | S122 Estimated | S89 KPIs: campuses live, app rating, tickets per campus, dealer-sourced share of pipeline, days from proposal to signature.

Proof pilots

Design: three campuses, one from the legacy base and two Chennai CBSE schools of 800 to 2,000 students with at least five buses, twelve weeks each, paid at Fedena-parity software plus dealer-priced hardware, with a written charter. Recommendation Scope: the ERP core migrated from the incumbent or spreadsheets, the parent app live for every family, the CCTV retention log and export tested against a mock CBSE request, bus alerts consuming the school's AIS-140 feed for every trip, staff face attendance measured for accuracy and time per person at the gate, and the DPDP consent register populated. Verified | S20 | S31 | S33 Success criteria: parent-app adoption above 80% of families, attendance accuracy above 98% with no queue longer than one minute, bus alerts delivered within two minutes of boarding on 95% of trips, fewer than three support tickets per campus per week by week eight, and a signed outcome letter the school allows Rax to name. Recommendation What a pilot must demonstrate to unlock scale: that a principal will pay for the compliance record and that a dealer will resell it.

Investment and revenue scenario

The base case reaches ₹1 crore in 2027, ₹2.2 crore in 2028 and ₹6 crore by 2031 from about 150 campuses at ₹4 lakh average, against an investment of ₹40 to 60 lakh in year one and one dedicated engineer and salesperson thereafter; the high case with an early group win reaches ₹12 crore. Estimated S6 S60 At those numbers ZenCampus is a fourth revenue line comparable to today's OEM design business, not a replacement for e-surveillance; it should be judged on whether it produces recurring revenue and references, not on scale. Rax-supplied S7 Estimated S7

Dependencies on other Rax lines

The EVA edge video analytics line supplies the face-attendance capability and must be certified as a camera or analytics device if sold into schools; X-Lite exit signage and emergency lights fit the NBC and CBSE safety checklist and can ride on the same dealer; the 4G router and PCMU serve as campus gateways; the DeepSea Master and rack-monitoring efforts compete for the same firmware engineers, which are already booked. Rax-supplied S7 S8 Verified S21 Software engineering has free bandwidth, which is the one internal condition that favours ZenCampus now. Rax-supplied S7

Kill criteria

Stop the plan if, by March 2027, no school has paid for a pilot; if the first pilot's parent app rates below 4.0 after 300 reviews; if the legacy-base response rate is under 30% by day 90; if no dealer has signed by June 2027; if a pilot generates more than five tickets per campus per week after week eight; or if a state or CBSE decision removes the clause 4.7.10 obligation. Recommendation Any of these means the compliance-layer thesis is wrong, and Option C, licensing the ERP and selling only certified analytics hardware, becomes the fallback.

SO WHAT FOR RAX

ZenCampus can be a ₹6 crore recurring line by 2031 if Rax spends the next twelve months earning one reference and two dealers, and it will be nothing if Rax spends them selling a vision. Recommendation

13 Evidence gaps

KEY TAKEAWAYS

- The unknowns that move the verdict most are internal: who the 300 legacy "active users" are, and what it costs Rax to install and serve a campus; Rax has confirmed no ZenCampus sale has been made. ● Rax-supplied S183 S6 S7
● Unknown
- Pass 2 closed three external gaps: tender eligibility clauses (three state documents opened), private-school CCTV adoption (Maharashtra assembly data) and the Tamil Nadu school-bus fleet (32,389 vehicles). ● Verified S167 S168
● Publicly observed S161 S164
- ERP, bus-tracking and attendance adoption in private schools remains unmeasured; the only national figures are unsourced vendor claims. ● Publicly observed S179 ● Unknown
- Four sizing assumptions stay load-bearing and unverified: ₹120 per student, buses per school, the private-school size distribution, and ₹4 lakh per campus contract. ● Estimated S13 S64 S81
- Next research is internal first (legacy list, cost to serve, face-attendance accuracy), then a 60-school phone survey in Tamil Nadu. ● Recommendation

Internal facts Rax must supply

GAP	WHY IT MATTERS	WHO HOLDS IT	WHAT CLOSES IT	LABEL
Identity of the 300 legacy Smart School Campus "active users": schools, logins or students; names, cities, contract dates, last payment	Segment 4, the ninety-day plan and the upward case for the verdict depend on it; these are legacy-product users, not ZenCampus customers	Sales lead; SSMS billing records	An exported customer list with a status column	Rax-supplied: S6, S183 ● Unknown
Cost to serve per campus: engineer visits, hosting, SMS and SIM costs, camera and storage bill of materials, AMC cost	The plan assumes hardware margin funds service; no cost, margin or receivables data exists for any Rax product	Finance and operations	A costed model for one 1,000-student campus	Rax-supplied: S7 ● Unknown
Face-recognition attendance accuracy, false-match rate, throughput at a gate, offline behaviour	Central to the AI claim and to consent risk; field failures ended attendance apps in Bihar and Uttar Pradesh, and Assam now writes consent and offline sync into its tender	Engineering (EVA analytics team)	A measured test on one campus	Verified: S54, S57; Publicly observed: S169 ● Unknown
GT-500M tracker specification and any AIS-140 test history	Bus tracking cannot be sold as compliance without ARAI approval	Engineering	Datasheet and a decision to integrate an approved device	Verified: S29 ● Unknown
Basis of the site's 350+ institutions and 96% retention claims	Unreconciled with the audit and with Rax's statement that no ZenCampus sale has been made	Managing Director; site owner	A dated list and definition, or removal	Publicly observed: S1 ● Rax-supplied S6 S183
The authoritative price, its period and scope	Three prices conflict; ₹10 per student has no period	Managing Director	A published price list	Rax-supplied: S3 ● Publicly observed S9
Payment gateway, hosting location, backup and breach process, UDISE+ and APAAR export	Buyer IT questionnaires, DPDP duties from 13 May 2027, CBSE registration	Engineering	A data map and integration note	Verified: S33, S155 ● Unknown
Pipeline: school leads from IndiaMART per month, win and loss reasons	Sets the start of the SOM curve	Sales	A lead log for the last 12 months	Rax-supplied: S7 ● Unknown

External unknowns, what pass 2 found and what would close them

UNKNOWN	PASS 2 SEARCHES	FOUND	STILL OPEN	LABEL
Share of private schools using an ERP, fee software, attendance, bus tracking or CCTV, by metro, tier-2 and tier-3	Parallel: "percentage of private schools in India using school ERP", "school management software adoption survey India", "private schools CCTV percentage India survey", "schools installed CCTV cameras percent state audit India"; UDISE+ 2025-26 booklet text searched for CCTV and biometric indicators	Maharashtra: CCTV in 47% of 44,380 private schools (2022), in 29,049 private schools (December 2025); vendor claims of under 8% or under 15% digital-management use with no traceable source; no CCTV or ERP indicator in the UDISE+ booklet	ERP, bus-tracking and attendance adoption; any tier split	Publicly observed: S164, S166, S179 Unknown
Eligibility clauses for state school software and CCTV tenders	Parallel: "RFP face recognition attendance system schools Samagra Shiksha", "request for proposal school management information system state education department", "tender CCTV cameras government schools RFP eligibility"	Gujarat school MIS RFP (CMMI 3, ₹3 crore IT turnover), Gujarat CCTV rate contract (1,000-camera reference, STQC report, ₹15 crore turnover), Assam Shiksha Setu 2.0 EOI (CMMI 3, consent for face recognition)	A Tamil Nadu tender; award prices	Verified: S167, S168; Publicly observed: S169
School-bus fleet and buses per school	Parallel: "Tamil Nadu school vehicles inspected 2025 reopening", "number of school buses in India registered", "Tamil Nadu 30,000 school buses"	Tamil Nadu permits 32,389 school buses and vans (2019); four buses per bus-running school in Kallakurichi (2026); 1,163 institutional vehicles in Thanjavur district (2026)	National count; buses per large private school	Publicly observed: S161, S162, S163
CBSE schools in Tamil Nadu	Parallel: "CBSE schools in Tamil Nadu number 2025", "CBSE affiliated schools total number 2026"	National total 33,151 confirmed; state-wise figures only from lead-list sellers of unknown quality	The CBSE directory's state filter needs a form submission, which this study does not make	Verified: S53 Unknown
Students by school size band and by management	UDISE+ 2025-26 Table 2.3	School shares by band (58.0% at 100 students or fewer, 7.0% above 500), all managements	Student counts by band and management	Verified: S13 Unknown
Demand for energy, water and environment telemetry in schools	Checked across the pass 1 listings, tender aggregators and review sites and the three tender documents opened in pass 2	No buyer language, price point or tender clause	Pilot interviews	Unknown
CISCE and state-board school counts	Not verified from a primary source	Third-party estimates only	CISCE affiliation list	Unknown

Load-bearing assumptions

ASSUMPTION	USED IN	BASIS	RISK IF WRONG	LABEL
₹120 per student per year for ERP, app and attendance	TAM, SAM	Between Fedena's ₹85 and e-School ERP's ₹130 to ₹180	TAM software line of ₹1,187 crore could be ₹800 to ₹2,000 crore	Estimated: S64, S93
60% of private schools above 300 students run buses, six each; eight buses for SAM schools	TAM, SAM, SOM	Tamil Nadu fleet check suggests the national figure is conservative; district data shows four per rural school	Transport is 60% of a campus contract	Estimated: S81, S161, S162
State shares of schools above 500 students (all managements) applied to private schools	SAM	UDISE+ publishes no private-only size bands	SAM understated if private schools are larger, which their averages suggest	Estimated: S13
₹4 lakh average annual contract and 150 campuses by 2031	SOM	Capacity of two salespeople plus two dealers	SOM range ₹1.5 to ₹12 crore	Estimated: S6, S60
15% of large private schools pay for an ERP today	Top-down triangulation	Entab revenue per school (₹3.4 lakh in FY2025, ₹3.9 lakh in FY20)	Current paid spend could be half or double	Estimated: S63, S178

Recommended next research, in priority order

1. Rax exports the legacy user list and the SSMS billing history; Sales calls every user with a five-question script. ● Recommendation
2. Finance costs one campus end to end; Engineering measures face-attendance accuracy at one gate. ● Recommendation
3. A 60-school phone survey (30 Chennai CBSE, 30 tier-2 Tamil Nadu matriculation) on current ERP, bus-tracking and CCTV vendors, spend, contract dates and APAAR workload. ● Recommendation
4. An RTI to the Tamil Nadu Transport Department for current school-bus permit counts by district. ● Recommendation
5. One Tamil Nadu school-education or ELCOT tender document for CCTV or attendance, to replace the Gujarat and Assam proxies. ● Recommendation

KEY TAKEAWAYS

- 183 sources were opened and registered across two passes (152 in the first, 31 in the second); 41 are primary or regulatory, and 170 concern India. Verified S13 S29 S33 S153 S160
- School and enrolment counts come from the UDISE+ 2024-25 and 2025-26 reports; regulation from CBSE, MoRTH, ARAI, MeitY, BIS and court orders; prices from vendor pages and marketplaces. Verified S12 S13 S25 S29 S122
- Rax's own claims were checked against the July 2026 deck audit and internal context, which override the public site. Rax-supplied S6 S7
- Analyst market-size reports were read only for triangulation and are rated low confidence; every sizing factor is shown. Publicly observed S99 S100
- Pass 2 re-verified ten load-bearing numbers against primary documents and corrected one (Samagra Shiksha 2024-25 actual spending); limits remain no primary survey and no logged-in browser. Verified S160 Unknown

Search strategy

Research ran on 15 September 2026 in five phases matching the report sections: product truth, market and regulation, competitors and pricing, buyers and channels, and sizing and strategy. A gap audit and a second pass followed. Searches used the Parallel search tool (several queries per call, then page fetches for exact wording), direct page fetches, and headless page capture for evidence images. Inferred

Query families followed the buyer's language: "school management software", "school ERP", "parent app", "fee management", "face attendance", "school bus GPS tracking", "CCTV for schools", plus regulatory terms ("clause 4.7.10", "AIS-140", "rule 125H", "DPDP Rules children", "Essential Requirements CCTV") and scheme terms ("Samagra Shiksha ICT", "PM SHRI", "PAB"). Inferred Portals and databases opened directly include the UDISE+ reports and PIB releases, the CBSE SARAS directory and affiliation bye-laws, the MoRTH gazette, ARAI's approved VLT list, the MeitY DPDP Rules, BIS guidelines on Essential Requirements, the Samagra Shiksha ICT page, NCPCR's safety manual, Kerala Sampoorna, KV Shaala Darpan, NVS tenders, GeM bids through an aggregator, and KHDA statistics for Dubai. Verified S12 S19 S25 S29 S33 S36 S48 S49 S51 S53 S104 S122 Commercial evidence came from vendor sites, pricing pages and OEM programmes; IndiaMART listings; Google Play review pages; SoftwareSuggest, Capterra, G2 and Techjockey; Tracxn and company-data pages for revenue and funding; and trade and national news. Publicly observed S60 S61 S63 S64 S66 S151

The date range runs from the Supreme Court's 1997 school-bus order to September 2026, with the weight on 2024 to 2026. The evidence is mostly English. Tamil-language parent and teacher forums were not searched systematically, which is a limit for voice of customer in the priority state. Verified S125 Unknown

Source mix and confidence

TYPE	COUNT	HOW USED
Vendor	56	Competitor products, prices, claims (Publicly observed)
News	35	Incidents, programmes, enforcement, assembly replies, funding
Primary	25	Government releases, budget documents, tender documents, court orders, parliamentary answers, directories
Reference	21	Company data, statute mirrors, aggregators
Regulatory	16	Bye-laws, circulars, gazettes, office memoranda, approved lists
Forum	9	App-store reviews and review sites
Internal	8	Decks, deck audit, product master, internal context, Saudi dossier, Rax statement of 15 September 2026
Analyst	6	Triangulation only

TYPE	COUNT	HOW USED
Academic and dataset	7	UDISE+ reports and analyses

Confidence was set per source. **High** means an official statistic, statute, gazette, court order, approved list or a national newspaper reporting an official act. **Medium** means a vendor's own page on its own product, a company-data aggregator, or trade media. **Low** means undated vendor blogs, marketplace listings, analyst teasers and reference sites. Inferred Of the 183 sources, 60 are high confidence, 86 medium and 37 low. Thirteen concern the GCC or global markets, about 7% of the total. Inferred Evidence labels follow the charter. A number is Verified only when the primary document was opened. A vendor's statement about itself is Publicly observed. Anything from a Rax deck or the internal record is Rax-supplied, even where it is plausible. Inferred

Limits and workarounds

Analyst reports (Grand View, The Business Research Company, Mordor, 6Wresearch, Data Bridge) are paywalled; only their public summaries were read, and the report does not rely on them. Publicly observed S99 S100 S102 S103 S116 Tender bid documents on eProcure sit behind captchas and aggregator paywalls; the first pass therefore relied on one GeM bid summary and programme budgets, and the second pass found three state documents published openly on state sites (two Gujarat tenders and an Assam EOI summary). Verified S51 S167 S168 Publicly observed S169 The CBSE school directory's state-wise count requires submitting a search form, which this study does not do, so the Tamil Nadu CBSE count stays Unknown. Unknown Scanned government circulars were read as page images where text extraction failed. Verified S154 zencampus.ai is a client-rendered single-page app that returns an empty body to plain requests; it was read through a rendering fetch and a headless screenshot. The UDISE+ 2023-24 booklet link returned an HTML shell, so that year was taken from secondary analyses of the same data. Publicly observed S1 Verified S16 No logged-in browser identity was used, no forms were submitted and no vendor was contacted, so all prices are published or observed, never quoted. Inferred

Changes between the first and second pass

The first pass wrote all fifteen sections from 152 sources. The gap audit, logged in `gaps.md`, checked every section brief, the fourteen questions in the session prompt, the depth floors and cross-section consistency, and listed eleven shortfalls. Inferred

The second pass added 31 sources and changed the report in five ways. First, it replaced secondary citations with primary ones for the numbers that carry the verdict: the CBSE notification inserting clause 4.7.10, the MeitY office memorandum ending non-compliant CCTV sales, the Union Budget notes for Samagra Shiksha and PM SHRI, the UDISE+ 2025-26 booklet, the DPDP Rules gazette and the ARAI list. Verified S153 S158 S160 S13 S33 S29 Second, it rebuilt the serviceable market on 2025-26 counts, moving it from ₹176 crore (4,659 schools) to ₹184 crore (4,866 schools), and corrected Samagra Shiksha's 2024-25 actual spending to ₹35,001.58 crore. Estimated S13 Verified S160 Third, it opened three state procurement documents and added clause-level evidence that state school software and camera contracts are closed to Rax. Verified S167 S168 Fourth, it added adoption and fleet evidence (Maharashtra CCTV counts, the Tamil Nadu school-bus fleet), CBSE's APAAR and UDISE+ data duties, the Ministry of Education's safety guidelines, five competitor profiles, five price points and eight buyer signals. Publicly observed S161 S164 Verified S155 S156 Fifth, it recorded Rax's statement that no ZenCampus sale has been made and made every section consistent with it. Rax-supplied S183

Source list

- S1

ZEN CAMPUS: The Intelligent School Operating System (home page) <https://zencampus.ai/>

Rax Tech International · undated · accessed 2026-09-15 · India · vendor · confidence medium · Claims 25+ years, 350+ institutions, 96% retention; pricing shown as Free Demo (30 days), Professional and Enterprise on custom quote; add-ons Bio-Metric and RFID; roles Principal, Admin, Teacher, Parent, Facility, Security, Super Admin
- S2

ZenCampus demo tenant: DEMO PUBLIC SCHOOL login (PWA) <https://zencampus.ai/STJOHN>

Rax Tech International · undated · accessed 2026-09-15 · India · vendor · confidence medium · Live tenant with academic years 2024-25 to 2027-28, parent self-registration by OTP, installable PWA; module list on the login page

- S3** ZenCampus sales deck, 14 slides <https://rax-decks-july-11.pages.dev/zencampus/sales>
Rax Tech International · 2026-07-11 · accessed 2026-09-15 · India · internal · confidence medium · From ₹10 per student; 14 ERP modules; 12 smart-campus systems; 300 legacy active users; teacher-time and fee-collection statistics attributed to UDISE+, EdTechReview and Deccan Chronicle; PDF copy in RAX-Pitch-Decks/ZenCampus/ZenCampus_Sales.pdf
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- S4** ZenCampus government and tender deck, 13 slides <https://rax-decks-july-11.pages.dev/zencampus/government>
Rax Tech International · 2026-07-11 · accessed 2026-09-15 · India · internal · confidence medium · Cites 14.7 lakh schools, 24.8 crore students, PM SHRI ₹27,360 crore, Samagra ICT grants ₹2.40 lakh and ₹6.40 lakh, DPDP, NBC; pilot cluster to district rollout; AMC; PDF copy in RAX-Pitch-Decks/ZenCampus/
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- S5** ZenCampus investor deck, 13 slides <https://rax-decks-july-11.pages.dev/zencampus/investor>
Rax Tech International · 2026-07-11 · accessed 2026-09-15 · India · internal · confidence medium · States 0 users on the AI product and 300 users on the legacy product; positions ERP plus IoT quadrant against Entab, Fedena, Teachmint, LEAD and CCTV/GPS vendors; cites 17% CAGR (Data Bridge/MRFR), \$29B India EdTech by 2030 (IBEF), 18.8% IoT-in-education CAGR
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- S6** Deck placeholder and brand audit: approved product facts <landings/RAX-Pitch-Decks/docs/deck-placeholder-audit.md>
Rax Tech International (internal) · 2026-07-11 · accessed 2026-09-15 · India · internal · confidence high · Approved facts: from ₹10 per student rising with AI capabilities; current AI-enabled ZenCampus 0 users; legacy Smart School Campus 300 active users; go-to-market direct enterprise sales
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- S7** Rax Tech International: verified internal context (CONTEXT-RAX) and ground-truth record <landings/rax-market-research/c harter/CONTEXT-RAX.md>
Rax Tech International (internal analysis) · 2026-08-05 · accessed 2026-09-15 · India · internal · confidence high · Audited turnover FY2017-18 to FY2025-26; SSMS 0.9% of ₹7.91 Cr in FY2025-26; two salespeople; failed channel and agency attempts; ISO 9001:2015 scope; BIS CRS applied; reputation constraint
-
- S8** Rax product master, 57 models landings/_rax-data/_analysis/rax-product-master.csv
Rax Tech International (internal extract) · 2026-08-04 · accessed 2026-09-15 · India · internal · confidence high · Row 43: Software, RT-SW-SCM, Smart Campus Master, cloud-based school management including ERP, safety, security and campus data monitoring
-
- S9** SMART SCHOOL ERP Software: product listing on Rax-Tech's IndiaMART storefront <https://www.rax-tech.in/school-managem ent-erp.html>
Rax-Tech International via IndiaMART (rax-tech.in) · undated · accessed 2026-09-15 · India · vendor · confidence medium · Approx. price ₹1,00,000 per piece, licence duration 1 year, Windows and Android, English only, 2 GB RAM, delivery 1 week, item code 8524; storefront rating 3.9/5 from 10 reviews (none for the school product)
-
- S10** Rax-Tech International product list including Vehicle Tracking System GT-500M <https://www.rax-tech.in/quality.html>
Rax-Tech International via IndiaMART (rax-tech.in) · undated · accessed 2026-09-15 · India · vendor · confidence low · Lists a Vehicle Tracking System GT-500M among Rax products; no AIS-140 approval stated
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- S11** RT-SW-SCM Zen Campus: Saudi commercial market research dossier <landings/IIBDAEI-Saudi-Market-Research-2026/research-v2/ products/rt-sw-scm.md>
IIBDAEI / Rax Tech (internal research, evidence cut 2026-07-19) · 2026-07-19 · accessed 2026-09-15 · Saudi Arabia · internal · confidence medium · Verdict CONDITIONAL; GASTAT counts 7,337 private schools (2024) of which 3,062 international; SAR-denominated TAM/SAM/SOM scenario; competitor notes on PowerSchool, Fedena, Classter, Naseej
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- S12** Report on Unified District Information System for Education Plus (UDISE+) 2024-25 https://dashboard.udiseplus.gov.in/repo rt-new-v.6-demo2025/static/media/UDISE+2024_25_Booklet_existing.118ba29d4773e6372f72.pdf
Department of School Education and Literacy, Ministry of Education, Government of India · 2025-08 · accessed 2026-09-15 · India · dataset · confidence high · 189-page booklet opened with pdftotext: total schools 14,71,473; government 10,13,322; aided 79,349; private unaided recognised 3,39,583; enrolment 24,69,32,680 of which private unaided 9,58,56,710; Tables 2.3 (enrolment brackets), 3.5 and 5.4 (state rows), 7.9 and 7.11 (computers, internet)
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- S13** **Report on UDISE+ 2025-26 (NEP structure)** https://dashboard.udiseplus.gov.in/report2026/static/media/UDISE+2025_26_Booklet_nep.94ceae1e8c2210549d21.pdf
Department of School Education and Literacy, Ministry of Education, Government of India · 2026-07 · accessed 2026-09-15 · India · dataset · confidence high · 175-page booklet opened with pdftotext: total schools 14,66,682; government 10,05,245; aided 79,261; private unaided 3,41,689; KVs 1,286; NVs 665; enrolment 24,72,19,766 of which private unaided 9,88,63,908 and government 11,89,03,585; teachers 1,02,73,020
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- S14** **Ministry of Education releases report on UDISE+ 2024-25** <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2161543®=48&lang=2>
Press Information Bureau, Government of India · 2025-08-28 · accessed 2026-09-15 · India · primary · confidence high · Teachers cross 1 crore in 2024-25
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- S15** **UDISE+ 2025-26 Report (NEP structure): dropout and enrolment highlights** <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2300408&lang=2®=48>
Press Information Bureau, Government of India · 2026-08-17 · accessed 2026-09-15 · India · primary · confidence high · Dropout 1.8% preparatory, 7.0% secondary, 3.6% middle
-
- S16** **Status of school education in India: an analysis based on UDISE+ 2021-22 to 2024-25** <https://educationforallinindia.com/status-of-school-education-in-india-an-analysis-based-on-udise-2021-22-to-2024-25>
Education for All in India (Prof. Arun C. Mehta) · 2026-05-30 · accessed 2026-09-15 · India · academic · confidence medium · Year series: total schools 14,89,115 / 14,66,109 / 14,71,891 / 14,71,473; private unaided 3,35,844 / 3,23,430 / 3,31,108 / 3,39,583; enrolment pre-primary to XII 26.52 / 25.18 / 24.80 / 24.69 crore; internet access 33.9% (2021-22) to 63.5% (2024-25)
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- S17** **Private schools cross the 40% enrolment mark: the government-to-private shift in UDISE+ 2025-26** <https://educationforallinindia.com/private-schools-cross-the-40-enrolment-mark-the-government-to-private-shift-in-udise-2025-26/>
Education for All in India (Prof. Arun C. Mehta) · 2026-07-20 · accessed 2026-09-15 · India · academic · confidence medium · Private unaided share of enrolment 31.1% (2021-22), 31.9%, 34.4%, 38.8%, 40.0% (2025-26); private unaided 23.3% of schools; average enrolment per private unaided school 289, government 118
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- S18** **Analysis of UDISE+ 2024-25 data** <https://educationforallinindia.com/analysis-of-udise-2024-25-data-by-prof-arun-c-mehta/>
Education for All in India (Prof. Arun C. Mehta) · 2025-08-31 · accessed 2026-09-15 · India · academic · confidence medium · 57.8% of schools (8,50,511) have fewer than 100 students; 6.6% have 500 or more; private unaided enrolment I-XII 85.70 million (36.80%) in 2024-25, up 4.82 million on 2023-24
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- S19** **Affiliation Bye-Laws 2018** https://saras.cbse.gov.in/SARAS/ui/assets/affiliation_bye_laws/Affiliation-Bye-Laws-English.pdf
Central Board of Secondary Education · 2018-10-18 · accessed 2026-09-15 · India · regulatory · confidence high · Chapter 4 physical infrastructure; clause 14.17 schools bound by CBSE circulars; clause 14.19 records; basis for the 2025 CCTV amendment
-
- S20** **CBSE introduces real-time CCTV guidelines for safer school environments** <https://www.sconline.com/blog/post/2025/07/22/cctv-cameras-in-schools-cbse-guidelines-2025-surveillance-student-safety/>
SCC Online Blog (EBC Publishing) · 2025-07-22 · accessed 2026-09-15 · India · news · confidence medium · Notification of 21 July 2025 inserts clause 4.7.10 in Chapter 4: high-resolution CCTV with real-time audio-visual recording at entry and exit, classrooms, corridors, stairs, labs, libraries, canteens, playgrounds, store rooms; toilets excluded; 15-day retention; aligns with NCPCR manual clause 1(X)
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- S21** **Safety of children in schools: clause 4.7.6 and safety references** <https://www.cbse.gov.in/cbsenew/safety.html>
Central Board of Secondary Education · undated · accessed 2026-09-15 · India · regulatory · confidence high · Clause 4.7.6 binds schools to NDMA School Safety Policy 2016 and related guidelines
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- S22** **CBSE circular 2017: safety of children in schools (security audit, CCTV, police verification)** https://www.cbse.gov.in/cbsenew/Examination_Circular/2017/16_CIRCULAR.pdf
Central Board of Secondary Education · 2017-09 · accessed 2026-09-15 · India · regulatory · confidence high · Schools to get a security audit from the local police station and report compliance online within two months
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- S23** CBSE issues circular on safety of students <https://www.thehindu.com/education/schools/cbse-issues-circular-on-students-safety/article19684817.ece>
The Hindu · 2017-09-14 · accessed 2026-09-15 · India · news · confidence high · Circular issued days after the Ryan International, Gurugram death: CCTV on premises, police verification and psychometric evaluation of staff
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- S24** Manual on Safety and Security of Children in Schools https://ncpcr.gov.in/public/viewPdf/165650391762bc3e6d27f93_manual-on-safety-and-security-of-children-in-schools-sep-2021.pdf
National Commission for Protection of Child Rights · 2021-09-08 · accessed 2026-09-15 · India · regulatory · confidence high · Compiles Supreme Court Avinash Mehrotra directions after the Kumbakonam fire (93 children), MoRTH bus guidelines, CBSE transport bye-law changes, KVS and NVS instructions; CCTV monitoring and maintenance
-
- S25** Notification G.S.R. 1095(E): vehicle location tracking device and emergency buttons (CMVR rule 125H) https://mort.h.nic.in/sites/default/files/notifications_document/Notification_no_G_S_R_1095_E_dated_28_11_2016_regarding_Installation_of_Vehicle_Tracking_Device_and_Emergency_buttons_0.pdf
Ministry of Road Transport and Highways, Government of India · 2016-11-28 · accessed 2026-09-15 · India · regulatory · confidence high · All public service vehicles (except two- and three-wheelers and e-rickshaws) to be fitted with VLT device and one or more emergency buttons; originally effective 1 April 2018
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- S26** Vehicle Location Tracking Devices and Emergency Buttons mandatory for all new public service vehicles registered after 1 January 2019 <https://www.pib.gov.in/PressReleasePage.aspx?PRID=1551387>
Press Information Bureau (MoRTH) · 2018-10-31 · accessed 2026-09-15 · India · primary · confidence high · AIS-140 devices mandatory for new PSVs from 1 January 2019; states to decide for existing vehicles
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- S27** GPS tracking system for vehicles (Lok Sabha reply) <https://www.pib.gov.in/PressReleasePage.aspx?PRID=1563379>
Press Information Bureau (MoRTH) · 2019-02-07 · accessed 2026-09-15 · India · primary · confidence high · States reported lack of command and control centres; implementation of rule 125H deferred by S.O. 1663(E) of 18 April 2018
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- S28** S. Rajaseekaran v Union of India: order on vehicle tracking systems and rule 125H <https://indiankanoon.org/doc/74316463/>
Supreme Court of India via Indian Kanoon · 2026-05-13 · accessed 2026-09-15 · India · primary · confidence high · Court records the Motor Vehicles (VLT Device and Emergency Button) Order 2018 (S.O. 5453(E) of 25 October 2018) and amendments of 25 October 2018 and 23 October 2019; VLTD data flows to a state command centre
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- S29** List of ARAI approved vehicle tracking systems (VLT devices and backend) as per AIS 140 https://www.araiindia.com/wp-content/uploads/2025/09/List-AIS-140-as-on-29.01.2026_Updated.pdf
Automotive Research Association of India · 2026-01-29 · accessed 2026-09-15 · India · regulatory · confidence high · Opened with pdftotext; searched for 'rax': no Rax Tech entry (only Traxsmart/Autotrax matches). Rax's GT-500M is therefore not an AIS-140 approved device on this list
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- S30** Ensure all school buses have CCTV cameras, GPS: Madras HC to TN govt <https://www.indiatoday.in/education-today/news/story/ensure-all-school-buses-have-cctv-cameras-gps-madras-hc-to-tn-govt-1574171-2019-07-27>
India Today · 2019-07-27 · accessed 2026-09-15 · India · news · confidence high · Madras High Court directs Tamil Nadu to instruct all schools to install CCTV and GPS in buses
-
- S31** Tamil Nadu: CCTV, female helpers made mandatory on school buses <https://www.newindianexpress.com/states/tamil-nadu/2024/Apr/05/tamil-nadu-cctv-female-helpers-made-mandatory-on-school-buses>
The New Indian Express · 2024-04-05 · accessed 2026-09-15 · India · news · confidence high · Directives based on court orders: drivers with 10 years' experience and no police case, GPS and CCTV fitted, vehicle and driver details uploaded
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- S32** Digital Personal Data Protection Act 2023, Section 9 (processing of personal data of children) <https://www.dpdpa.com/dpdpa2023/chapter-2/section9.html>
dpdpa.com (statute text with commentary) · 2026-01-09 · accessed 2026-09-15 · India · reference · confidence medium · Section 9(1): verifiable consent of parent or lawful guardian before processing a child's data; 9(3): no tracking, behavioural monitoring or targeted advertising directed at children; child means under 18
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- S33** Digital Personal Data Protection Rules, 2025, G.S.R. 846(E) https://www.dpdpa.com/DPDP_Rules_2025_English_only.pdf
Ministry of Electronics and Information Technology, Gazette of India Extraordinary Part II Section 3(i) · 2025-11-13 · accessed 2026-09-15 · India · regulatory · confidence high · Opened with pdftotext. Rule 1(4): rules 3, 5 to 16, 22 and 23 commence eighteen months after publication (13 May 2027); rule 4 (consent managers) after twelve months; rule 10 verifiable parental consent; rule 12 and Fourth Schedule Part A item 3: educational institutions exempt from s.9(1) and (3) for tracking and behavioural monitoring restricted to educational activities and safety of enrolled children; item 5: school transport providers exempt for location tracking during travel
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- S34** DPDP Rules 2025: clear mandates for data fiduciaries, retention, and child data exemptions <https://brandequity.economictimes.indiatimes.com/news/digital/dpdp-rules-2025-clear-mandates-for-data-fiduciaries-retention-and-child-data-exemptions/125321212>
ETBrandEquity (The Economic Times) · 2025-11-14 · accessed 2026-09-15 · India · news · confidence medium · Summary of Third and Fourth Schedules; educational institutions and school transport exemptions
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- S35** Navigating privacy risks for edtech platforms and educational institutions under India's data protection regime <https://ksandk.com/data-protection-and-data-privacy/dpdp-act-compliance-for-edtech-schools/>
King Stubb & Kasiva · 2026-07-27 · accessed 2026-09-15 · India · reference · confidence medium · Penalties up to ₹250 crore per contravention; schools and LMS providers are data fiduciaries; self-declared age and school-level permissions not sufficient
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- S36** ICT@Samagra Shiksha: financial provisions and sanctions <https://dse.education.gov.in/en/scheme/ict-samagra>
Department of School Education and Literacy, Ministry of Education · 2025-01-10 · accessed 2026-09-15 · India · regulatory · confidence high · ICT lab non-recurring up to ₹6.40 lakh plus ₹2.40 lakh per year for five years; smart classrooms ₹2.40 lakh non-recurring plus ₹0.38 lakh recurring (two per school); 1,20,614 ICT labs and 82,120 smart classrooms sanctioned; all ICT procurement through GeM; coverage is government and aided schools classes VI to XII
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- S37** Govt approves 1.46 lakh smart classrooms across India under Samagra Shiksha (Lok Sabha reply) <https://ddnews.gov.in/en/govt-approves-1-46-lakh-smart-classrooms-across-india-under-samagra-shiksha/>
DD News (Prasar Bharati) · 2025-07-28 · accessed 2026-09-15 · India · primary · confidence high · 1,46,040 smart classrooms approved; Maharashtra 5,155, Madhya Pradesh 9,531; BharatNet broadband to all government secondary schools in rural areas announced in Budget 2025
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- S38** PM SHRI Schools scheme guide <https://schemesinindia.in/central/pm-shri-schools-scheme>
Schemes in India (reference site) · 2026-05-02 · accessed 2026-09-15 · India · reference · confidence low · 14,500 schools, ₹27,360 crore, 2022-23 to 2026-27, about ₹2 crore per school over five years; official portal pmshrischools.education.gov.in not opened
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- S39** Punjab utilised only one-third of Samagra Shiksha funds for digital infra in schools <https://www.hindustantimes.com/cities/chandigarh-news/punjab-utilised-only-1-3rd-of-samagra-shiksha-funds-for-digital-infra-in-schools-101742325597540.html>
Hindustan Times · 2025-03-19 · accessed 2026-09-15 · India · news · confidence medium · Disbursement lag: sanctioned ICT and smart classroom grants under-utilised
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- S40** Delhi government to install 1.46 lakh CCTV cameras in its schools <https://www.ndtv.com/delhi-news/delhi-government-to-install-1-46-lakh-cctv-cameras-in-its-schools-1853178>
NDTV / Press Trust of India · 2018-05-16 · accessed 2026-09-15 · India · news · confidence high · EFC approval: ₹597.51 crore for 1,028 school buildings; ₹384.85 crore execution, ₹57.69 crore five-year maintenance, ₹154.97 crore leased-line internet; 30-day storage; parent app for live classroom feed; seven bidders
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- S41** Delhi govt schools to be installed with CCTV cameras soon, live feed to be shared with parents <https://www.indiatoday.in/cities/delhi/story/delhi-govt-schools-installed-cctv-cameras-live-feed-shared-parents-1972824-2022-07-07>
India Today · 2022-07-07 · accessed 2026-09-15 · India · news · confidence medium · Four years after approval the rollout was still being announced as imminent
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- S42** **CCTV to be installed in all govt high and higher secondary schools** <https://www.dtnext.in/news/tamilnadu/cctv-to-be-installed-in-all-govt-high-and-higher-secondary-schools-762646>
DT Next · 2024-01-22 · accessed 2026-09-15 · India · news · confidence medium · About 4,200 TN government high and higher secondary schools (25 lakh students) without CCTV; earlier announcement of ₹21 crore for 2,800 schools; project planned for 2020 stalled by COVID; tender to be floated; quotes from a School Education official and K Ganapathy of the TN Teachers Welfare Association
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- S43** **Karnataka: 3,333 government schools to be in CCTV radar** <https://bangaloremirror.indiatimes.com/bangalore/others/karnataka-3333-government-schools-to-be-in-cctv-radar/articleshow/65774141.cms>
Bangalore Mirror · 2018-09 · accessed 2026-09-15 · India · news · confidence medium · ₹10 crore sanctioned for cameras in 3,333 government schools (about ₹30,000 per school); The News Minute reported the same ₹10 crore release for 3,000-plus schools in May 2021
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- S44** **Schools in Maharashtra ordered to install CCTV after Badlapur violence** <https://www.securitytoday.in/schools-in-maharashtra-ordered-to-install-cctv-after-badlapur-violence/>
Security Today · 2024-08-29 · accessed 2026-09-15 · India · news · confidence medium · State directive to all schools to install CCTV within a month after the Badlapur sexual-abuse case
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- S45** **Badlapur assault case: Maharashtra issues guidelines for students' safety in schools** <https://www.thehindu.com/news/national/maharashtra/badlapur-assault-case-maharashtra-issues-guidelines-for-students-safety-in-schools/article69572279.ece>
The Hindu · 2025-05-13 · accessed 2026-09-15 · India · news · confidence high · 23-page GR of 13 May 2025 following a Bombay High Court-ordered expert committee: enhanced CCTV at classroom entrances, corridors, entrances and exits, playgrounds
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- S46** **Andhra Pradesh: face recognition app has stabilised attendance system in schools, says official** <https://www.thehindu.com/news/national/andhra-pradesh/andhra-pradesh-face-recognition-app-has-stabilised-attendance-system-in-schools-says-official/article65934934.ece>
The Hindu · 2022-09-25 · accessed 2026-09-15 · India · news · confidence high · 1.67 lakh teachers and 7,000 non-teaching staff marked attendance through the state face-recognition app on 24 September 2022; real-time data on teachers, students and mid-day meals
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- S47** **Tamil Nadu School Education Department attendance dashboard (AadhaarBAS and AadhaarFACERD)** <https://tnschools.attendance.gov.in/>
Government of Tamil Nadu / attendance.gov.in · undated · accessed 2026-09-15 · India · primary · confidence medium · State-run Aadhaar-based biometric and face attendance for school staff; a free government substitute for staff attendance
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- S48** **Sampoorna school management software** <https://education.kerala.gov.in/2019/07/27/sampoorna/>
General Education Department, Government of Kerala (KITE) · 2019-07-27 · accessed 2026-09-15 · India · primary · confidence high · Launched by KITE in 2010; mandatory for all students Std 1 to 12 in government and aided schools; built on free and open source software; a free government substitute for core ERP
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- S49** **Kendriya Vidyalaya Shaala Darpan** <https://informatics.nic.in/article/482>
National Informatics Centre (Informatics) · undated · accessed 2026-09-15 · India · primary · confidence high · KV Shaala Darpan implemented by NICSI on NIC cloud for 1,185 Kendriya Vidyalayas; school automation, parent SMS, admissions; KVS does not buy commercial ERP
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- S50** **Navodaya Vidyalaya Samiti: tenders, notifications and agreements** <https://navodaya.gov.in/nvs/en/Tender/>
Navodaya Vidyalaya Samiti · undated · accessed 2026-09-15 · India · primary · confidence medium · Tender history is dominated by internet leased lines, manpower, housekeeping and vehicle hire; personnel information system hosted by a contractor (dcservices.in); no school ERP or CCTV tender listed at HQ level
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- S51** Kendriya Vidyalaya Sangathan GeM bid GEM/2025/B/6833509: cameras, video recorders, cabling, switches, rack (Bhopal, Madhya Pradesh) <https://www.tendershark.com/details/madhya-pradesh-tender/kendriya-vidyalaya-sangathan/06a14ffb-57a0-4153-b081-e41c1fb80ea4>
TenderShark (GeM bid aggregator) · 2025-11-24 · accessed 2026-09-15 · India · reference · confidence medium · 993 items across CCTV camera V3, video recorder V2, Cat-6 cable, layer-2 switch and server rack; published 29 October 2025, closed 24 November 2025; goods category; value in document; shows KVs buy CCTV as GeM goods bids school by school
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- S52** School management software tenders in India (2026 count) <https://www.tenderdetail.com/Indian-tender/school-management-software-tenders>
tenderdetail.com · undated · accessed 2026-09-15 · India · reference · confidence low · Aggregator reports 51 school management software tenders published in 2026; individual documents behind paywall
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- S53** CBSE schools directory (SARAS 7.0) <https://saras.cbse.gov.in/saras/AffiliatedList/ListOfSchdirReport>
Central Board of Secondary Education · undated · accessed 2026-09-15 · India · primary · confidence high · Total number of schools affiliated with CBSE: 33,151 on the date of access; 493 disaffiliated or closed
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- S54** Bihar is using an app to track teachers' attendance, much to their anger <https://scroll.in/article/1075292/bihar-is-using-an-app-to-track-teachers-attendance-much-to-their-anger>
Scroll.in · 2024-11-07 · accessed 2026-09-15 · India · news · confidence high · e-Shikshakosh app: photo plus location within 500 m between 8.30 and 9 am; verbatim headmaster and teacher complaints about loading, wrong location, network; activist quote 'this app is not solving any problems'
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- S55** UP digital attendance system for teachers, launched on July 8, suspended https://www.business-standard.com/india-news/up-on-line-attendance-for-teachers-up-digital-attendance-system-for-teachers-launched-on-july-8-suspended-124071700465_1.html
Business Standard · 2024-07-17 · accessed 2026-09-15 · India · news · confidence high · Quote from Sandeep Kumar, Lucknow Metropolitan Primary Education Association; time window relaxed on 12 July; system suspended
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- S56** 'Why only us?': reasons UP govt teachers are against new online attendance <https://www.indiatoday.in/india-today-insight/story/why-only-us-reasons-up-govt-teachers-are-against-new-online-attendance-2566680-2024-07-14>
India Today · 2024-07-14 · accessed 2026-09-15 · India · news · confidence high · Attendance between 7.45 and 8 am with location; poor rural connectivity; official quote on curbing absenteeism
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- S57** U.P. govt backs off on digital attendance rule amid teachers' protest <https://www.thehindu.com/news/national/uttar-pradesh/up-govt-backs-off-on-digital-attendance-rule-amid-teachers-protest/article68411344.ece>
The Hindu · 2024-07-16 · accessed 2026-09-15 · India · news · confidence high · Mandatory digital attendance put on hold on 16 July 2024
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- S58** Private school fees: beware government regulation trojan horse <https://educationworld.in/private-school-fees-beware-government-regulation-trojan-horse/>
EducationWorld · 2025-06-26 · accessed 2026-09-15 · India · news · confidence medium · Estimates 450,000 private schools with 110 million children; fee levels ₹1 lakh to ₹4 lakh in tier 1 and 2 cities, ₹50,000 to ₹2 lakh in tier 3 and 4; state-by-state fee regulation acts including Tamil Nadu 2009 and Gujarat 2017 ceilings
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- S59** School bus fee, safety and GPS complaint: India parent guide 2026 <https://righttoinformation.wiki/school-bus-fee-safety-gps-complaint-india>
righttoinformation.wiki · 2026-09-01 · accessed 2026-09-15 · India · reference · confidence low · Parent-side escalation routes; CMVR rule 125C, state school bus rules, Supreme Court directions; treats a GPS down for weeks as a fitness defect
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- S60** Entab: pricing, features and reviews <https://www.softwaresuggest.com/entab>
SoftwareSuggest · 2018-06-18 · accessed 2026-09-15 · India · forum · confidence medium · Entab claims 1,200-plus schools and 18 years; custom pricing; 4.4/5 from 8 reviews; competitors listed MySchool, Skool Manager, IDSPRime
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- S61** **CampusCare app listing and user reviews** <https://play.google.com/store/apps/details?id=com.campuscare.entab.ui>
Google Play (Entab Infotech Pvt Ltd) · 2026-07-30 · accessed 2026-09-15 · India · forum · confidence high · 4.0 stars from 124K reviews; verbatim complaints dated April to July 2026 about forced logins, monthly updates, data use, PDF download errors and crashes; Entab's public reply
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- S62** **India's most trusted school parent app and student mobile app** <https://www.entab.in/mobile-apps.html>
Entab Infotech (CampusCare) · undated · accessed 2026-09-15 · India · vendor · confidence medium · CampusCare apps claim more than 4 lakh installs and 4.3-star ratings; bus tracking with live GPS included in the parent app
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- S63** **Entab Infotech Private Limited: company insights (FY2025 revenue)** <https://www.thecompanycheck.com/company/entab-infotech-private-limited/U72200DL2001PTC110768>
The Company Check · undated · accessed 2026-09-15 · India · reference · confidence medium · Revenue ₹40.74 crore for FY2025, up 5% year on year; Tracxn places the same company in the ₹10 to ₹50 crore band
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- S64** **Fedena pricing and plans** <https://fedena.com/pricing-and-plans>
Foradian Technologies (Fedena) · undated · accessed 2026-09-15 · India · vendor · confidence high · Standard USD 999, Premium USD 1,399, Ultimate USD 1,699 per year (web app), unlimited users, free cloud hosting; enterprise on quote; 14-day trial; claims 40,000-plus institutes worldwide; basic version open source
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- S65** **Fedena partner and OEM programme** https://fedena.com/channel_partner
Foradian Technologies (Fedena) · undated · accessed 2026-09-15 · India · vendor · confidence medium · White-label OEM programme: 'your label, your price with our code and services'; vendor and consultant reseller programme
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- S66** **Teachmint: company profile, funding and financials** https://tracxn.com/d/companies/teachmint/___20hzJsaQqn1Rx--LmV-MYhMY7hVCfzgx9GyitF_ntU8
Tracxn · 2026-08-07 · accessed 2026-09-15 · India · reference · confidence medium · Total funding USD 118 million over five rounds from 28 investors
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- S67** **Teachmint: pricing, free demo and features; user reviews** <https://softwarefinder.com/lms/teachmint>
Software Finder · 2026-04-22 · accessed 2026-09-15 · India · forum · confidence low · Lists a starting price of USD 5 per user per year (unverified by vendor); reviewer reports app crashes during tests
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- S68** **Teachmint reviews (including MyClassCampus users)** <https://www.capterra.com/p/163105/Teachmint/reviews>
Capterra · undated · accessed 2026-09-15 · India · forum · confidence medium · Reviews by principals and administrators; one switched from CampusCare; cons include training and problem resolution
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- S69** **LEAD hits Rs 350 Cr revenue milestone in FY24; cuts losses by 56%** <https://entrackr.com/fintrackr/lead-hits-rs-350-cr-revenue-milestone-in-fy24-cuts-losses-by-56-8556872>
Entrackr · 2024-12-24 · accessed 2026-09-15 · India · news · confidence high · Revenue from operations ₹351 crore FY24 (product sales 79%, platform services ₹75 crore); loss ₹143 crore; partnered with 8,000-plus schools in 400-plus cities; USD 180 million raised; unicorn in 2022
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- S70** **Next Education company profile** <https://www.datanyze.com/companies/next-education/372578691>
Datanyze · undated · accessed 2026-09-15 · India · reference · confidence low · Claims 18,000 schools and 12 million students; products TeachNext and NextERP; Hyderabad and Noida
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- S71** **Vidyalaya School ERP: pricing, features and reviews** <https://www.softwaresuggest.com/vidyalaya>
SoftwareSuggest · undated · accessed 2026-09-15 · India · forum · confidence medium · Ahmedabad; 487 reviews averaging 5/5; custom pricing; one reviewer notes slowness, bugs and slow support
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- S72** **Edunext Technologies: school ERP and mobile apps** <https://edunexttechnologies.com/>
Edunext Technologies · undated · accessed 2026-09-15 · India · vendor · confidence low · Noida-based school ERP, apps and digital platforms; customer count not published on the page opened
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- S73** **Skolaro school ERP (50-plus modules)** <https://www.skolaro.com/>
Skolaro · undated · accessed 2026-09-15 · India · vendor · confidence medium · Cloud ERP for schools, colleges and universities; testimonial from a Kolkata trust running 13 institutions with 20,000 students; India International School, Ghaziabad
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- S74** **MyClassboard school ERP (login page and site)** <https://school.myclassboard.com/>
MyClassboard Educational Solutions Pvt Ltd · undated · accessed 2026-09-15 · India · vendor · confidence medium · Hyderabad SaaS school ERP catering to 1,200-plus schools; products ERP, Finance, Admission, HR, LMS, Connect; safety and security solutions
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- S75** **Schoolpad school management software** <https://schoolpad.in/>
Schoolpad · undated · accessed 2026-09-15 · India · vendor · confidence medium · 8,000-plus educators, 1,50,000-plus student profiles, 45,000-plus online fee transactions; Capterra lists contact-vendor pricing
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- S76** **Campus 365 plans and pricing** <https://www.campus365.io/plans-and-pricing>
Campus 365 · 2020-10-05 · accessed 2026-09-15 · India · vendor · confidence high · Lite ₹5,999 per month billed yearly for institutes under 300 students; Enterprise on quote; OEM and reseller programme; RFID and GPS device discounts
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- S77** **Edtech start-up Uolo bags \$7 mn funding from Five Sigma, other investors** <https://www.outlookbusiness.com/start-up/investors/edtech-start-up-uolo-bags-7-mn-funding-from-five-sigma-other-investors>
Outlook Business · 2025-12-12 · accessed 2026-09-15 · India · news · confidence medium · Uolo in 2,500-plus schools with 1.1 million paying students; Tracxn records USD 41.2 million total funding
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- S78** **Chennai Campus school ERP software** <https://www.chennaicampus.com/>
eHash Softwares (Chennai Campus) · 2024-04-24 · accessed 2026-09-15 · India · vendor · confidence medium · Chennai-based school ERP founded 2013, seven releases, web and mobile; sales@ehashsoft.com; a direct local competitor
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- S79** **GPS school bus tracking software: how it works and what it costs** <https://proschool360.com/gps-school-bus-tracking-software>
ProSchool360 · undated · accessed 2026-09-15 · India · vendor · confidence medium · 500-plus schools in 18-plus states; GPS hardware ₹4,000 to ₹8,000 per bus one-time; SIM ₹150 to ₹300 per bus per month; Premium software ₹1,000 per month per school with no per-bus fee; compatible with Teltonika, Concox, Queclink
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- S80** **MyClassAdmin school bus tracking app and software** <https://www.indiamart.com/proddetail/school-bus-tracking-app-software-25860939488.html>
IndiaMART listing (Vasai Virar) · undated · accessed 2026-09-15 · India · vendor · confidence medium · ₹5,900 per piece listing; states ₹30 per student per month for the transport app
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- S81** **How much does a GPS tracker cost? What schools in India should know** <https://neotrack.ai/school-bus-gps-tracker-cost-india/>
NeoTrack (NeoSay Technologies, Coimbatore) · 2025-09-18 · accessed 2026-09-15 · India · vendor · confidence medium · Market ranges: basic ₹3,000 to ₹5,000 device and ₹1,500 to ₹3,000 per bus per month; mid-tier ₹6,000 to ₹12,000 and ₹3,000 to ₹5,000; premium AIS-approved ₹12,000 to ₹20,000 and ₹5,000 to ₹8,000 per month; NeoTrack gives hardware free; 650-plus schools, 25,745 vehicles, 320,060 subscriptions on its home page
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- S82** **School bus tracking system** <https://loconav.com/school-bus-tracking-system>
LocoNav · undated · accessed 2026-09-15 · India · vendor · confidence medium · AIS-140 certified trackers with SOS, geofencing and parent app; customer review by Dhinakaran S; pricing on request
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- S83** **Chakravier School Bus Tracker (parent app)** https://play.google.com/store/apps/details?hl=en_US&id=com.chakravier.parent
Google Play (Chakravier Solutions Pvt Ltd, Mumbai) · 2026-06-10 · accessed 2026-09-15 · India · vendor · confidence medium · App-based tracking using attendant and operator phones as an alternative to GPS devices
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- S84** **Truein face attendance: pricing and plans** <https://www.techjockey.com/detail/truein-face-attendance>
Techjockey · 2021-04-29 · accessed 2026-09-15 · India · vendor · confidence medium · Time Capture from ₹290 per user per year, Advanced from ₹390; SoftwareSuggest lists USD 4 to 6 per user per year plus a ₹69,000 base; hardware-less tablet or phone kiosk; ISO 27001 and SOC 2
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- S85** **Face recognition attendance and access control systems** <https://esslsecurity.com/face>
eSSL Security · undated · accessed 2026-09-15 · India · vendor · confidence medium · Face terminals for offices, schools and colleges; claims 40 lakh customers; dealer-only support model
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- S86** **COSEC CENTRA on-premise access control and time-attendance** <https://www.matrixcomsec.com/product/cosec-centra>
Matrix Comsec · 2025-02-28 · accessed 2026-09-15 · India · vendor · confidence medium · Scales to 65,000 door controllers and 10 lakh users; education listed as an industry; quote-based
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- S87** **Realtime face recognition attendance machine T501** <https://www.indiamart.com/proddetail/face-recognition-attendance-machine-12573109862.html>
IndiaMART listing (HBS Automation, New Delhi) · undated · accessed 2026-09-15 · India · vendor · confidence medium · ₹20,500 per piece observed price for a standalone face terminal
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- S88** **Campus (education) surveillance solution** <https://cpplusworld.com/education>
CP PLUS · undated · accessed 2026-09-15 · India · vendor · confidence medium · Reference design: bullet cameras at gates with licence-plate recognition, corridor mode, panic buttons, audio analytics, mobile DVR with GPS for school vans; no list prices
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- S89** **How much should a complete CCTV setup cost in India in 2026? Honest price breakdown** <https://www.sbmtechnologies.in/post/how-much-should-a-complete-cctv-setup-cost-in-india-in-2026-honest-price-breakdown>
SBM Technologies (Chennai CCTV dealer) · 2026-05-29 · accessed 2026-09-15 · India · vendor · confidence medium · 16-camera school or multi-floor setup ₹75,000 to ₹1,40,000 complete with NVR, 6 to 8 TB storage, PoE, UPS and installation; 8 cameras ₹32,000 to ₹50,000
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- S90** **CP Plus CCTV camera price guide** <https://cctvcamerawholesaleprice.com/cp-plus-cctv-camera-price-guide/>
cctvcamerawholesaleprice.com · 2025-04-02 · accessed 2026-09-15 · India · vendor · confidence low · 16-camera package ₹25,000 to ₹1,00,000-plus; DVR/NVR ₹2,000 to ₹30,000; installation ₹1,000 to ₹5,000
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- S91** **What is Automotive Industry Standard 140 (AIS-140) in India?** <https://blog.fleetx.io/blog-gps-ais140/>
Fleetx · undated · accessed 2026-09-15 · India · vendor · confidence medium · AIS-140 GPS device price ₹6,000 to ₹11,000; VLTID components and certification chain (ARAI, Vahan, state backend)
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- S92** **MyClassboard pricing and reviews, with comparison table** <https://www.techjockey.com/detail/myclassboard>
Techjockey · 2022-05-25 · accessed 2026-09-15 · India · vendor · confidence medium · Comparison prices on the page: Vedcool ₹11,000, School Magica ₹20,000, E-School ERP ₹40,000, Shineing ₹12,000 per year, VigoCamp ₹5,000 per year, Classunify ₹180 per month, MyAppClass ₹11,999; MyClassboard price on request
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- S93** **School management software pricing (e-School ERP)** <https://www.g2.com/products/imran-malik-school-management-software/pricing>
G2 · undated · accessed 2026-09-15 · India · vendor · confidence low · Vendor states ₹160 to ₹180 per student for schools up to 500 students and ₹130 to ₹160 per student per year above 500
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- S94** **How much does school management software cost in 2026?** <https://www.classe365.com/blog/how-much-does-school-management-software-cost-in-2026/>
Classe365 · undated · accessed 2026-09-15 · Global · vendor · confidence low · Global benchmark USD 2 to 15 per student per month; not an India price
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- S95** **Classter pricing** <https://www.classter.com/pricing/>
Classter · 2026-08-03 · accessed 2026-09-15 · Global · vendor · confidence medium · Per-student modular pricing example: Core EUR 8.50, Academics and LMS EUR 6.50 per student; example EUR 21.5 per active student per year for a 1,000-student institution
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- S96** **Frappe Education: open source ERP for academic institutes** <https://frappe.io/education>
Frappe Technologies · undated · accessed 2026-09-15 · Global · vendor · confidence medium · AGPL-3.0 open source ERP for enrolment, classes, assessments and fees; hosted on Frappe Cloud; the ERPNext education substitute
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- S97** **Extramarks Education: digital education solutions (IndiaMART profile)** <https://www.indiamart.com/extramarks-education/>
Extramarks via IndiaMART · undated · accessed 2026-09-15 · India · vendor · confidence low · Claims more than 5,000 schools and about a million students across India, South Africa and the Middle East; Smart Class Plus with ERP features
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- S98** **ICT scheme under Samagra Shiksha Abhiyan** <https://www.idreameducation.org/samagra-shiksha-ict-scheme-india/>
iDream Education · 2026-05-30 · accessed 2026-09-15 · India · vendor · confidence medium · Vendor view of the ICT lab, smart classroom and teacher tablet grants; tablet revision from PAB 2025-26; example of a government-scheme channel player
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- S99** **India education ERP market size and outlook, 2025-2030** <https://www.grandviewresearch.com/horizon/outlook/education-erp-market/india>
Grand View Research (Horizon) · 2025-01-13 · accessed 2026-09-15 · India · analyst · confidence low · States USD 0.8 million (2024) to USD 3.4 million (2030) at 27.7% CAGR, which is implausibly small against vendor revenues (Entab alone ₹40.74 crore); cited only to show analyst figures for this category are unreliable
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- S100** **School management system global market report 2026** <https://www.thebusinessresearchcompany.com/report/school-management-system-global-market-report>
The Business Research Company · 2026-07-31 · accessed 2026-09-15 · Global · analyst · confidence low · Global USD 22.3 billion (2025) to USD 42.66 billion (2030), 13.4% CAGR; Asia-Pacific fastest growing
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- S101** **India's edtech surge: opportunities in online education and training** <https://www.ibef.org/blogs/india-s-edtech-surge-opportunities-in-online-education-and-training>
India Brand Equity Foundation · 2025-11-03 · accessed 2026-09-15 · India · analyst · confidence medium · India EdTech valued at ₹1,10,198 crore (USD 12.75 billion) in 2024, projected ₹5,29,384 crore by 2035; includes B2C learning, not only school software
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- S102** **India education ERP market (2025-2031)** <https://www.6wresearch.com/industry-report/india-education-erp-market>
6Wresearch · undated · accessed 2026-09-15 · India · analyst · confidence low · Year-wise growth rates 2021 -2.9%, 2022 9.5%, 2023 7.6%, 2024 7.2%, 2025 7.6%, 2026 7.5%; base value not disclosed
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- S103** **School information management system market: size and forecast** <https://www.mordorintelligence.com/industry-reports/school-information-management-system-market>
Mordor Intelligence · 2026-01-14 · accessed 2026-09-15 · Global · analyst · confidence low · States India is channelling INR 57 billion (USD 685 million) into state-level SIS rollouts; basis not shown
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- S104** **KHDA data and statistics: Dubai private schools 2024-25** <https://web.khda.gov.ae/en/Resources/KHDA-data-statistics>
Knowledge and Human Development Authority, Dubai · 2025-01 · accessed 2026-09-15 · UAE · primary · confidence high · 227 private schools and 387,441 students in 2024-25; ten new schools opened that year; 25 new institutions announced for 2025-26
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- S105** **Administrative Resolution No. (196) of 2015 issuing the implementing bylaw of Executive Council Resolution No. (2) of 2008 regulating school transport in the Emirate of Dubai** [https://dlp.dubai.gov.ae/Legislation%20Reference/2015/Administrative%20Resolution%20No.%20\(196\)%20of%202015.html](https://dlp.dubai.gov.ae/Legislation%20Reference/2015/Administrative%20Resolution%20No.%20(196)%20of%202015.html)
Government of Dubai Legal Affairs Department · 2015 · accessed 2026-09-15 · UAE · regulatory · confidence high · A school bus must have a GPS to enable tracking of its location
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- S106** **Why 1,642 school buses were fined in Dubai** <https://gulfnews.com/uae/transport/why-1642-school-buses-were-fined-in-dubai-1.2157647>
Gulf News · 2018-11-05 · accessed 2026-09-15 · UAE · news · confidence medium · RTA technical regulations: mandatory GPS tracking, CCTV cameras, 3+2 seating; enforcement by fines
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- S107** **School management system development in Saudi Arabia: NOOR, SADAD and PDPL compliance guide** <https://logiolegion.com/blogs/school-management-system-development-saudi-arabia-noor-sadad-pdpl>
Logio Legion (vendor guide) · 2026-07-04 · accessed 2026-09-15 · Saudi Arabia · reference · confidence low · Private schools under MOE supervision exchange enrolment, attendance, grades and certificates with the NOOR system; Iqama verification for expatriate students
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- S108** National rollout of India's largest private schools chain (Sri Chaitanya) <https://educationworld.in/national-rollout-of-indias-largest-private-schools-chain/>
EducationWorld · 2025-06-26 · accessed 2026-09-15 · India · news · confidence medium · 750 institutions, 650,000 students, 322 Techno Schools, 107 CBSE schools; administration was manual until 2007 at 70 institutions; plans 200 CBSE schools in three years; in-house edtech subsidiary
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- S109** The Velammal Educational Trust <https://velammaltrust.com/>
Velammal Group of Institutions · undated · accessed 2026-09-15 · India · vendor · confidence medium · Group of more than a lakh students and about 12,000 staff across Chennai and nine Tamil Nadu districts; brands Velammal International, Bodhi Campus, Vidyalaya, Matriculation
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- S110** ORCHIDS The International School <https://www.orchidsinternationalschool.com/>
K12 Techno Services · undated · accessed 2026-09-15 · India · vendor · confidence medium · 75,000-plus students across 25-plus cities; smart classrooms
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- S111** As PE firms return to schools, Kedaara-backed K-12 Techno looks to raise \$150-200 million <https://www.livemint.com/companies/start-ups/k12-techno-services-pe-deal-orchids-the-international-school-education-industry-11766469247044.html>
Mint · 2025-12-24 · accessed 2026-09-15 · India · news · confidence medium · K-12 Techno (Orchids) valuation USD 800 to 900 million; KKR's Lighthouse Learning (EuroKids) also PE-owned; chains have central procurement
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- S112** National Independent Schools Alliance (NISA) <https://nisaindia.org/>
NISA Education · undated · accessed 2026-09-15 · India · primary · confidence medium · Platform of budget private schools across India with a registered-member programme; an association channel
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- S113** Sri Chaitanya Educational Institutions https://en.wikipedia.org/wiki/Sri_Chaitanya_Educational_Institutions
Wikipedia · 2026-07-31 · accessed 2026-09-15 · India · reference · confidence low · Over 8.5 lakh students; 321 junior colleges, 322 Techno Schools, 107 CBSE schools; tertiary reference
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- S114** SchoolPad software review 2026 <https://www.capterra.com/p/202429/SchoolPad>
Capterra · 2026-08-20 · accessed 2026-09-15 · India · forum · confidence low · Contact-vendor pricing; one review; positions Schoolpad for small organisations
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- S115** India's school education crisis: what UDISE+ data reveals <https://frontline.thehindu.com/the-nation/udise-report-india-education-enrollment-government-schools-crisis/article71253359.ece/amp>
Frontline (The Hindu group) · 2026-07-22 · accessed 2026-09-15 · India · news · confidence medium · State ranking of private unaided schools: Uttar Pradesh 1,07,905, Rajasthan 33,903, Madhya Pradesh, Maharashtra 17,824 (2025-26)
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- S116** Global school management system market <https://www.databridgemarketresearch.com/reports/global-school-management-system-market>
Data Bridge Market Research · 2025-03-04 · accessed 2026-09-15 · Global · analyst · confidence low · USD 21.94 billion (2024) to USD 77.57 billion (2032), 17.10% CAGR; the source of the investor deck's 17% figure; lists Foradian and Buzzyyears among players
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- S117** School ERP Total IT Solution (IndiaMART listing) <https://www.indiamart.com/raxtech/school-erp-total-it-solution.html>
Rax-Tech International via IndiaMART · undated · accessed 2026-09-15 · India · vendor · confidence low · Second Rax school-ERP listing on IndiaMART; no price captured
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- S118** School Bus Tracker (Conjoinix XSSecure) app listing and reviews https://play.google.com/store/apps/details?hl=en_US&id=com.conjoinix.smartparent
Google Play (Conjoinix Total Solutions, Pathankot) · 2024-05-21 · accessed 2026-09-15 · India · forum · confidence low · 3.6 stars from 2.33K reviews; parent reviews on pick-up alerts and breakdown alerts
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- S119** Ensuring student safety: UAE's school bus safety standards <https://totalsecureme.com/blogs-all/ensuring-student-safety-uaes-comprehensive-school-bus-safety-standards-and-modifications/>
TotalSecure ME · 2025-06-28 · accessed 2026-09-15 · UAE · reference · confidence low · Seven CCTV cameras per bus (four outside, three inside); Sharjah mandates IP cameras
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- S120** Chennai Campus: best school ERP software company in Chennai (blog) <https://www.chennaicampus.com/best-school-erp-software-company-in-chennai/>
eHash Softwares (Chennai Campus) · 2023-11-11 · accessed 2026-09-15 · India · vendor · confidence low · Founded 2013; seven major releases; sells across Tamil Nadu and South India; local competitor evidence
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- S121** Rax-Tech International: introduction (IndiaMART profile) <https://www.rax-tech.in/profile.html>
Rax-Tech International via IndiaMART · undated · accessed 2026-09-15 · India · vendor · confidence low · Established 2000; lists School Management System Software and Student Management System Software alongside industrial products; still shows ISO 9001:2008
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- S122** Guidelines for implementation of Essential Requirement(s) for Security of CCTV (Registration/MeitY/CCTV Camera) https://www.crsbis.in/BIS/app_srv/tdc/gl/docs/CCTV_Implementation_guidelines.pdf
Bureau of Indian Standards, Registration Department · 2024-10-22 · accessed 2026-09-15 · India · regulatory · confidence high · CCTV cameras and recorders under compulsory registration (IS 13252 Part 1) via the Electronics and IT Goods (Requirements for Compulsory Registration) Order 2021; MeitY notified ER-01 on 9 April 2024; implementation extended to 9 April 2025; non-compliant models deleted from licence scope after that date; fee ₹30,000 per application plus ₹20,000 per extra test report
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- S123** India mandates BIS ER compliance for CCTV cameras by 2026 <https://www.certification-india.com/en/india-mandates-bis-er-compliance-for-cctv-cameras-by-2026/>
certification-india.com · 2026-04-16 · accessed 2026-09-15 · India · reference · confidence medium · MeitY Office Memorandum of 16 January 2026 withdrew the stock-clearance relaxation; from 1 April 2026 only ER-compliant, certified CCTV cameras may be sold
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- S124** STQC certification and ER compliance for CCTV cameras <https://www.matrixcomsec.com/stqc-certification-er-compliance-for-cctv-cameras>
Matrix Comsec · 2026-06-04 · accessed 2026-09-15 · India · vendor · confidence medium · Vendor timeline of the CRO, ER and STQC mandate; market consolidation as only certified models remain saleable
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- S125** M.C. Mehta v Union of India, order of 16 December 1997 (school bus safety directions) <https://indiankanoon.org/doc/534459/>
Supreme Court of India via Indian Kanoon · 1997-12-16 · accessed 2026-09-15 · India · primary · confidence high · Modifies the 20 November 1997 order on Delhi traffic and school transport; origin of the yellow-bus, speed-governor and attendant rules later adopted by states
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- S126** We The People v Union of India, PIL Civil 2163 of 2017 (Allahabad High Court), quoting Uttar Pradesh school bus guidelines of 20 November 2012 https://www.livelaw.in/pdf_upload/pdf_upload-370334.pdf
Allahabad High Court via LiveLaw · 2019-07-11 · accessed 2026-09-15 · India · primary · confidence high · Court records M.C. Mehta (1997) 8 SCC 770 as the source of school bus safety directions and the UP 2012 guidelines: 40 km/h limit with speed governor, fire extinguishers, first aid, golden-yellow colour, permit conditions enforced at fitness test
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- S127** Tamil Nadu Motor Vehicles (Regulation and Control of School Buses) Special Rules, 2012 <https://indiankanoon.org/doc/92026828>
Government of Tamil Nadu via Indian Kanoon · 2012 · accessed 2026-09-15 · India · regulatory · confidence high · No school bus without a permit under section 76; structural and safety conditions; the 2024 directive on GPS, CCTV and female helpers builds on these rules
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- S128** National Education Mission receives ₹42,100 crore allocation in Budget 2026 <https://www.cnbctv18.com/budget/national-education-mission-receives-rs-42100-crore-allocation-in-budget-2026-ws-l-19836754.htm>
CNBC TV18 · 2026-02-01 · accessed 2026-09-15 · India · news · confidence high · Samagra Shiksha BE 2026-27 ₹42,100 crore; RE 2025-26 ₹38,000 crore; FY25 actual ₹36,288 crore; FY24 actual ₹32,830 crore; PM SHRI ₹7,500 crore; DoSEL ₹83,562 crore; 60:40 centre-state funding; UP largest recipient ₹6,264 crore in FY25
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- S129** Analysis of Department of School Education budget allocations (2025-2026) <https://educationforallindia.com/analysis-of-department-of-school-education-budget-allocations-2025-2026/>
Education for All in India (Prof. Arun C. Mehta) · 2025-02-04 · accessed 2026-09-15 · India · academic · confidence medium · Samagra Shiksha BE 2025-26 ₹41,250 crore; 2023-24 actual ₹32,830 crore left ₹4,180 crore (11.3%) of RE unspent; PM SHRI actual 2023-24 ₹1,214.68 crore against BE 2025-26 ₹7,500 crore; only 46.2% of government schools had internet in 2023-24
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- S130** Samagra Shiksha fund allocation to Tamil Nadu dips for second year <https://www.newindianexpress.com/states/tamil-nadu/2026/July/17/samagra-shiksha-fund-allocation-to-tamil-nadu-dips-for-second-year>
The New Indian Express · 2026-07-17 · accessed 2026-09-15 · India · news · confidence high · Allocation falls from ₹2,733 crore to ₹2,469 crore; the Centre continues to withhold ₹3,440 crore in the PM SHRI-NEP dispute with Tamil Nadu
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- S131** NEP 2020 actionable points: chapter 23, technology use and integration (para 23.5) https://innovateindia.mygov.in/nep_citizen_theme/chapter-23-technology-use-and-integration-para-23-3/
MyGov / Ministry of Education · undated · accessed 2026-09-15 · India · primary · confidence high · Para 23.5: technology to streamline educational planning, management and administration including admissions, attendance and assessments; para 23.3: National Educational Technology Forum
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- S132** Demand for Grants 2026-27 analysis: Education <https://prsindia.org/budgets/parliament/demand-for-grants-2026-27-analysis-education>
PRS Legislative Research · 2026 · accessed 2026-09-15 · India · reference · confidence medium · Samagra Shiksha allocations 36,502 / 38,000 / 42,100 crore; on average 86% of the allocation is utilised annually
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- S133** Vidyalaya school management system (official site) <https://www.vidyalayaschoolsoftware.com/>
Vidyalaya School Software (Ahmedabad) · undated · accessed 2026-09-15 · India · vendor · confidence medium · Claims 25+ years legacy, 2,000+ satisfied clients, 96% client retention, 1.5 million students, 40+ modules; integrations for biometric, vehicle tracking, WhatsApp, Tally, online payment; testimonials from Navrachana (Vadodara) and a six-school operator; the same three headline phrases (25+ years, 96% retention) appear on zencampus.ai
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- S134** Uolo: practise-based scholastic programs and school platform (official site) <https://www.uolo.com/>
Uolo Edtech Pvt Ltd · undated · accessed 2026-09-15 · India · vendor · confidence medium · Claims 15,000+ schools and 5.5 million+ students; sells learning programmes (Tekie, Speak, Amplify) with a school management app; Outlook Business reports 2,500 paying schools
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- S135** Teachmint X: AI-powered connected classroom device (official site) <https://www.teachmint.com/>
Teachmint Technologies · undated · accessed 2026-09-15 · India · vendor · confidence medium · Home page now leads with 75- and 86-inch interactive digital boards with three-year on-site warranty; reference logos include Delhi Public School, City Montessori School, Daly College, Bhashyam Group and Saudi schools; contact address in Dubai South
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- S136** Teachmint: AI study app (Google Play listing) https://play.google.com/store/apps/details?id=com.teachmint.teachmint&hl=en_US
Google Play (Teachmint) · undated · accessed 2026-09-15 · India · vendor · confidence medium · 10 million+ downloads, 4.5 stars from 186K reviews; positioned for teachers, tutors and coaching institutes
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- S137** MCB Parent App (Google Play listing) https://play.google.com/store/apps/details?id=com.mcb.myclassboard.activity&hl=en_IN
Google Play (Myclassboard Educational Solutions Pvt Ltd) · undated · accessed 2026-09-15 · India · forum · confidence medium · 10 lakh+ downloads, 3.2 stars from 60.3K reviews; the lowest rating among the major parent apps observed
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- S138** Uolo Learn (Google Play listing) https://play.google.com/store/apps/details?hl=en_US&id=com.uolo.notes
Google Play (Uolo Edtech Pvt Ltd) · undated · accessed 2026-09-15 · India · forum · confidence medium · 1 million+ downloads, 4.2 stars from 37.8K reviews; fees, homework and announcements for schools on Uolo
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- S139** **Entab: turn school data into leadership intelligence (official home page)** <https://www.entab.in/>
Entab Infotech Pvt Ltd · undated · accessed 2026-09-15 · India · vendor · confidence medium · 2026 positioning on AI analytics, chatbot, predictive at-risk detection; ERP, LMS, website; multi-factor authentication and role-based permissions; 'compliant with global data protection standards'
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- S140** **Prama Hikvision Pvt Ltd (company page)** <https://linkedin.com/company/prama-hikvision-pvt.-ltd>
LinkedIn · undated · accessed 2026-09-15 · India · reference · confidence low · Hikvision's Indian joint venture; about 456 employees on LinkedIn; Hikvision recognised as the number one DVR supplier by IMS Research; India distribution of the dominant camera brand
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- S141** **Chettinad Vidyashram, Rajah Annamalaipuram, Chennai: admission, fee, affiliation** <https://school.careers360.com/schools/chettinad-vidyashram-rajah-annamalaipuram-chennai>
Careers360 (school directory) · undated · accessed 2026-09-15 · India · reference · confidence medium · CBSE, private unaided, 8,019 students, 484 teachers, 210 classrooms, school bus service; class 10 annual cost ₹86,975 (tuition ₹81,775); the school's own site says 9,500-plus students
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- S142** **Vels Group: school education (list of campuses)** <https://velsgroup.in/vels-schools/>
Vels Group · undated · accessed 2026-09-15 · India · vendor · confidence medium · Twelve-plus campuses (Vael's International, Vels Vidyashram CBSE, Vels Global) across Chennai, Pallavaram, Tambaram, Medavakkam, Mogappair and Erode; group states over 10,000 students a year across institutions
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- S143** **The PSBB Millennium School, Chennai** https://gropikipedia.com/page/the_psbb_millennium_school_chennai
Gropikipedia (reference compilation) · 2026-01-03 · accessed 2026-09-15 · India · reference · confidence low · PSBB Millennium network of more than 11,000 students across Chennai campuses (2024); CBSE affiliation numbers 1930201 and 1930377; ISO 9001:2015; Padma Seshadri Bala Bhavan group founded 1958
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- S144** **FICCI School Education (FICCI ARISE) sector page** <https://www.ficci.in/sector/school-education-ficci-arise>
Federation of Indian Chambers of Commerce and Industry · undated · accessed 2026-09-15 · India · primary · confidence medium · ARISE incubated in FICCI in 2016; network of more than 1,800 schools serving over 1.6 million students with state chapters
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- S145** **Become a member: ARISE (Association for Reinventing School Education)** <https://ariseedu.in/membership/>
ARISE · 2026-06-15 · accessed 2026-09-15 · India · primary · confidence medium · Independent since 2024; 20 states, 1,800-plus schools, 1.5 million students, 95,000-plus teachers; membership ₹1,00,000 joining and ₹1,00,000 a year plus GST; principal forum, annual conference, excellence awards
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- S146** **State Education Policy committee meets private school management associations** <https://www.thehindu.com/news/cities/chennai/state-education-policy-committee-meets-private-school-management-associations/article66258885.ece>
The Hindu · 2022-12-13 · accessed 2026-09-15 · India · news · confidence medium · Names the Federation of Associations of Private Schools in Tamil Nadu and the Tamil Nadu Nursery, Primary, Matric, Higher Secondary and CBSE Schools Association as the bodies that represent private school managements to the state
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- S147** **School Voice: Tamilnadu All Private Schools Association** <https://tnprivateschools.com/>
Tamil Nadu private schools association site · undated · accessed 2026-09-15 · India · primary · confidence low · Federation of Private Schools started in 1977; grew from the Tamil Nadu Nursery, Primary and Matriculation association
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- S148** **Chennai Sahodaya Schools Complex** <https://www.chennaisahodaya.org/>
Chennai Sahodaya Schools Complex (CBSE cluster body) · undated · accessed 2026-09-15 · India · primary · confidence medium · First Sahodaya complex in Tamil Nadu (2003); 300-plus member CBSE schools in 10-plus clusters including Velammal, Maharishi Vidya Mandir, SRM Public School and Crescent; runs common examinations, principal conclaves and award functions
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- S149** **DIDAC India: the event (visitor profile)** <https://didacindia.com/visitors/the-event>
DIDAC India (India Didactics Association) · 2026-04-16 · accessed 2026-09-15 · India · reference · confidence low · Annual education-technology exhibition and conference for school owners, principals and heads; three days of exhibition, conferences and workshops
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- S150** **SoftwareSuggest pricing 2026: plans and hidden costs** <https://toolradar.com/tools/softwaresuggest/pricing>
ToolRadar · undated · accessed 2026-09-15 · Global · reference · confidence low · SoftwareSuggest 'Basic' vendor listing at USD 4,000 for six months; G2 and Capterra offer performance-based lead options
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- S151** **School management software: manufacturers, suppliers and prices (547 listings)** <https://www.tradeindia.com/manufacturers/school-management-software.html>
TradeIndia · 2026-08-15 · accessed 2026-09-15 · India · vendor · confidence low · Marketplace price points: ₹2,500 (student management), ₹12,000, ₹30,000, ₹45,000 and ₹55,000 per licence for school ERP; Chennai and Coimbatore among supplier cities
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- S152** **How to list a service on the GeM portal** <https://www.bidz365.com/blog/how-to-list-a-service-on-the-gem-portal>
Bidz365 (GeM training provider) · 2025-01-30 · accessed 2026-09-15 · India · reference · confidence low · Service catalogue steps: category, SLA, project experience with work orders, pricing standard or on demand, admin approval; GeM has 335 service categories
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- S153** **CBSE notification: amendments in Chapter 4 of the Affiliation Bye-Laws 2018 w.r.t. safety in schools (clause 4.7.10, CCTV)** https://www.cbse.gov.in/cbsenew/documents/Amendments_Chapter_4_21072025.pdf
Central Board of Secondary Education · 2025-07-21 · accessed 2026-09-15 · India · regulatory · confidence high · Opened in pass 2. No. CBSE/AFF./Notification/2025/01310 dated 21.07.2025, signed by Secretary Himanshu Gupta: clause 4.7.10 requires high-resolution CCTV with audio-visual facility at entry and exit points, lobbies, corridors, staircases, all classrooms, labs, library, canteen, store room, playground and common areas except toilets, with real-time audio-visual recording and storage of at least 15 days' footage accessible to authorities
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- S154** **CBSE circular: implementation of APAAR ID as the primary identifier for students of CBSE-affiliated schools** https://www.cbse.gov.in/cbsenew/documents/Circular_Implementation_APAAR_ID_24012025.pdf
Central Board of Secondary Education · 2025-01-24 · accessed 2026-09-15 · India · regulatory · confidence high · Scanned 8-page circular read as page images in pass 2. Schools conduct PTMs, collect signed physical consent forms, verify Aadhaar-linked details on UDISE+, generate APAAR IDs, print them on ID cards and integrate them into the school's IT systems
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- S155** **CBSE circular: submission of registration data of Class IX and XI students for 2025-26 (APAAR linkage)** https://www.cbse.gov.in/cbsenew/documents/Submission_Registration_Data_Class_IXXI2526_15092025.pdf
Central Board of Secondary Education · 2025-09-15 · accessed 2026-09-15 · India · regulatory · confidence high · Opened with pdftotext in pass 2. APAAR ID of each student registered for Class IX or XI made mandatory; OASIS and HPE portal data must be updated first; data uploaded with the principal's Aadhaar-linked e-signature; parental refusal recorded as REFUSED
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- S156** **Guidelines on School Safety and Security 2021 (D.O. letter and guidelines)** https://dsel.education.gov.in/sites/default/files/2021-10/guidelines_sss.pdf
Ministry of Education, Department of School Education and Literacy · 2021-10-01 · accessed 2026-09-15 · India · primary · confidence high · Issued pursuant to Supreme Court writ petitions (CrI) 136 of 2017 and (C) 874 of 2017 to fix accountability of school management, including private unaided schools and school transport; states notify under section 35(2) of the RTE Act; fines for private schools proportionate to the previous year's revenue
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- S157** **Guidelines on school safety and security released by Education Ministry (states directed to enforce)** <https://www.edexlive.com/news/2024/Aug/24/guidelines-on-school-safety-and-security-released-by-education-ministry>
EdexLive (The New Indian Express group) · 2024-08-24 · accessed 2026-09-15 · India · news · confidence medium · MoE directed all states and UTs in August 2024 to enforce the 2021 guidelines and report implementation status; accountability covers government, aided and private schools
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- S158** Office Memorandum W-18/26/2025-IPHW: withdrawal of extension for compliance with Essential Requirements for security of CCTV cameras <https://www.meity.gov.in/static/uploads/2026/01/06f42f7b81035795b9db65ae4f339227.pdf>
Ministry of Electronics and Information Technology · 2026-01-16 · accessed 2026-09-15 · India · regulatory · confidence high · Primary text opened in pass 2: the 21 May 2025 stock-clearance relaxation stands withdrawn from 1 April 2026; no sale of CCTV cameras not conforming to the ERs notified on 9 April 2024 is allowed from that date
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- S159** BIS Registration Department circular: non-applicability of security ER to analog CCTV cameras https://www.crsbis.in/BI/S/app_srv/tdc/gl/docs/analog_circular_final.pdf
Bureau of Indian Standards · 2025-04-01 · accessed 2026-09-15 · India · regulatory · confidence high · MeitY clarified on 12 March 2025 that the CCTV security ERs do not apply to analog cameras; analog models need only IS 13252 (Part 1) test reports and a self-declaration
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- S160** Notes on Demands for Grants 2026-27, Demand No. 25, Department of School Education and Literacy <https://www.indiabudget.gov.in/doc/eb/sbe25.pdf>
Ministry of Finance, Union Budget · 2026-02-01 · accessed 2026-09-15 · India · primary · confidence high · Opened with pdftotext in pass 2. Samagra Shiksha: actual 2024-25 ₹35,001.58 crore, BE 2025-26 ₹41,249.98 crore, RE 2025-26 ₹38,000 crore, BE 2026-27 ₹42,100 crore. PM SHRI: actual 2024-25 ₹3,504.30 crore, BE 2025-26 ₹7,500 crore, RE 2025-26 ₹4,500 crore, BE 2026-27 ₹7,500 crore
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- S161** 1,263 school buses, vans fail fitness test across Tamil Nadu <https://www.newindianexpress.com/states/tamil-nadu/2019/may/23/1263-school-buses-vans-fail-fitness-test-across-tamil-nadu-1980710.html>
The New Indian Express · 2019-05-23 · accessed 2026-09-15 · India · news · confidence high · Transport Commissioner C Samayamoorthy: 32,389 buses and vans permitted to carry school children in Tamil Nadu; Salem 2,603, Kancheepuram 2,233, Coimbatore 2,015; 10,549 inspected in 25 districts by 17 May, 1,263 failed
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- S162** Officials check school buses for road worthiness in Kallakurichi <https://www.thehindu.com/news/national/tamil-nadu/officials-check-school-buses-for-road-worthiness-in-kallakurichi/article71017083.ece>
The Hindu · 2026-05-24 · accessed 2026-09-15 · India · news · confidence high · 320 buses from 80 schools inspected in Kallakurichi and Ulundurpet on 23 May 2026 (four buses per bus-running school); 20 found not roadworthy
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- S163** Vehicles of educational institutions inspected (Thanjavur district) <https://www.thehindu.com/news/cities/Tiruchirapalli/vehicles-of-educational-institutions-inspected/article70982873.ece>
The Hindu · 2026-05-15 · accessed 2026-09-15 · India · news · confidence high · Annual inspection of 1,163 vehicles owned or hired by educational institutions in Thanjavur district on 15 May 2026 (Thanjavur 538, Pattukottai 365, Kumbakonam 260)
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- S164** Over 89,000 CCTV cameras installed in Maharashtra schools: minister (assembly reply) <https://www.ndtv.com/india-news/over-89-000-cctv-cameras-installed-in-maharashtra-schools-minister-9793698>
NDTV · 2025-12-11 · accessed 2026-09-15 · India · news · confidence high · School Education Minister Bhuse in the assembly: CCTV fitted in about 60,049 local body government schools and 29,049 private schools under the 13 May 2025 GR; 4,888 schools registered on the state School Portal; 1,03,703 schools confirmed POCSO adherence
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- S165** Only 50% schools under CCTV watch puts students at risk <https://timesofindia.indiatimes.com/city/pune/only-50-schools-under-cctv-watch-puts-students-at-risk/articleshow/119316964.cms>
The Times of India (Pune) · 2025-03-21 · accessed 2026-09-15 · India · news · confidence medium · Minister: only 50,000 of 1,08,082 Maharashtra schools had installed CCTV; costs to be borne by schools through CSR and public participation
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- S166** All private schools must install CCTV cameras: Maharashtra minister <https://timesofindia.indiatimes.com/city/mumbai/all-pvt-schools-must-install-cctv-cameras/articleshow/90450767.cms>
The Times of India (Mumbai) · 2022-03-26 · accessed 2026-09-15 · India · news · confidence medium · After a 2016 circular, only 47% of 44,380 private aided and unaided schools had installed cameras; only 1,624 of 65,000 government schools
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- S167** RFP No. SSA/2022-23/VSK: selection of IT service provider for augmentation and upgradation of MIS applications and dashboards at Vidya Samiksha Kendra https://www.ssagujarat.org/VSK%20Consultants_%20RFP.pdf
Gujarat Council of School Education, Samagra Shiksha · 2023-05-20 · accessed 2026-09-15 · India · primary · confidence high · Opened with pdftotext in pass 2. Pre-qualification: seven years' existence; average annual IT turnover ₹3 crore over three years; 25 full-time IT employees; three e-governance projects; CMMI level 3. EMD ₹6 lakh, bid fee ₹15,000, tendered on GeM. Existing state apps include a School Management System and a Vehicle Tracking System for School Transport
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- S168** Bid document HWT18092024: rate contract for IP CCTV and display solutions on turnkey basis for Gujarat government departments <https://gil.gujarat.gov.in/tendercms/TenderDocs/2024918114958853.pdf>
Gujarat Informatics Limited · 2024-09-18 · accessed 2026-09-15 · India · primary · confidence high · Opened with pdftotext in pass 2. Eligibility: system integrator; one project of 1,000 IP cameras or two of 750 in five years; OEM authorisations; office in Gujarat; total turnover ₹15 crore over three years; OEM seven years in India; STQC or CERT-In lab security test report per MeitY notification of 6 March 2024. EMD ₹20 lakh; fee ₹17,700
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- S169** Assam invites partners for Shiksha Setu 2.0 digital overhaul (EOI summary) <https://www.theedupress.com/2026/03/rfp-eoi-tender/strengthening-school-governance-assam-invites-partners-for-shiksha-setu-2-0-digital-overhaul/>
The EduPress · 2026-03-22 · accessed 2026-09-15 · India · news · confidence medium · World Bank-funded ASAP project EOI by Samagra Shiksha Axom: CMMI level 3, five years in multilateral or government-funded projects; multi-modal attendance engine (biometric, facial recognition, SMS, offline); facial recognition subject to legal review and opt-in consent; UDISE+ and PFMS integration; submission closed 1 April 2026
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- S170** Rajya Sabha starred question no. 342: APAAR ID system and data privacy https://sansad.in/getFile/annex/267/AS342_pcwtYu.pdf?source=pqars
Rajya Sabha, Ministry of Education · 2025-04-02 · accessed 2026-09-15 · India · primary · confidence high · Minister's statement: APAAR ID enrolment is voluntary and consent based, with consent from parents or guardians for school students; MeitY data security guidelines followed
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- S171** Airtel Xsafe subscription plans <https://www.airtel.in/xsafe/subscription>
Bharti Airtel · undated · accessed 2026-09-15 · India · vendor · confidence medium · ₹999 a year for one camera with free installation, additional camera ₹699 a year, or ₹119 a month; cameras ₹2,499 to ₹4,499; India cloud storage; home and small-office oriented
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- S172** AI video surveillance for education and campus security <https://www.videonetics.com/education>
Videonetics · undated · accessed 2026-09-15 · India · vendor · confidence medium · Kolkata VMS and analytics vendor: campus zones, facial recognition for staff and visitor entry and automated attendance, campus vehicle and bus tracking, multi-campus command centre; IIT Delhi case study with about 300 cameras through integrator Supreme Audiotek
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- S173** What is JARVIS? AI video analytics and VMS platform <https://www.staqu.com/what-is-jarvis>
Staqu Technologies · undated · accessed 2026-09-15 · India · vendor · confidence medium · Gurugram video analytics vendor claiming 200+ clients; facial recognition attendance and access; state police deployments; Vijaybhoomi University testimonial; integrates attendance events into ERP and HRMS
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- S174** Hikvision face recognition terminal DS-K1T320MFWX (IndiaMART listing) <https://www.indiamart.com/proddetail/hikvision-face-recognition-terminal-ds-k1t320mfwx-2851056251812.html>
Digital Automation, Vadodara, via IndiaMART · undated · accessed 2026-09-15 · India · vendor · confidence low · ₹4,699 per piece listed
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- S175** eSSL face recognition system (IndiaMART listing) <https://www.indiamart.com/proddetail/essl-face-recognition-system-15687551888.html>
Precision Pro Secure, Ahmedabad, via IndiaMART · undated · accessed 2026-09-15 · India · vendor · confidence low · ₹10,500 per piece listed
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- S176** ZKTeco SpeedFace-V5L face recognition attendance and access terminal <https://attendancemachine.in/products/zkteco-speedface-v5l>
AmpleTrails (authorised distributor store) · undated · accessed 2026-09-15 · India · vendor · confidence low · Sale price ₹27,645 (regular ₹33,176); 6,000 face templates; marketed to educational institutions among others
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- S177** **Entab Infotech financials and company details** <https://www.tozler.in/entab-infotech-private-limited/company/U72200DL2001PTC110768>
Tozler (MCA filings aggregator) · 2026-07-29 · accessed 2026-09-15 · India · reference · confidence medium · Revenue band ₹25 to 50 crore on March 2024 numbers; incorporated 9 May 2001; corroborates the order of magnitude of The Company Check's ₹40.74 crore FY2025
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- S178** **Entab media coverage and press releases** <https://www.entab.in/coverages.html>
Entab Infotech · undated · accessed 2026-09-15 · India · vendor · confidence medium · Coverage excerpt: Entab had signed up 900 schools and made ₹35 crore revenue in FY20 (about ₹3.9 lakh per school)
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- S179** **EduGradUP school management software, from ₹9,000 a year** <https://schoolsoftwareindia.com/>
EduGradUP (schoolsoftwareindia.com) · 2026-05-11 · accessed 2026-09-15 · India · vendor · confidence low · Flat ₹9,000 a year with 43 modules; claims fewer than 8% of India's 14.89 lakh schools use digital management software, citing an unverifiable 'National Education Technology Forum' estimate; a sister page claims fewer than 15%
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- S180** **Rethinking classroom surveillance: trust teachers over cameras** <https://educationforallinindia.com/rethinking-classroom-surveillance-trust-teachers-over-cameras/>
Education for All in India · 2025-09-07 · accessed 2026-09-15 · India · academic · confidence low · Blog estimate, no stated source: 50 to 60% of private unaided schools have CCTV against 30 to 40% of government schools
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- S181** **UDISE+ and APAAR ID integration (school ERP feature page)** <https://unityedu.ai/udise-apaar/>
Unity Education · undated · accessed 2026-09-15 · India · vendor · confidence low · ERP vendor advertising automated UDISE+ submission and APAAR ID integration, evidence that data-exchange with government portals is now a selling point
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- S182** **EMBIBE: AI-powered learning platform (home page)** <https://www.embibe.com/>
Embibe · undated · accessed 2026-09-15 · India · vendor · confidence medium · Consumer and school learning content in 12 languages with a Jio user offer; no school ERP, attendance or campus-safety product on the home page
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- S183** **Statement from Gabriel (Rax) on ZenCampus sales, recorded in CONTEXT-RAX** <landings/rax-market-research/charter/CONTEXT-RAX.md>
Rax Tech International (internal) · 2026-09-15 · accessed 2026-09-15 · India · internal · confidence high · Statement 4: no sales have been made of the current ZenCampus product, consistent with the deck audit (AI ZenCampus 0 users; legacy Smart School Campus 300 active users)
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ZenCampus · version 1.0 · research cutoff 2026-09-15 · updated 2026-09-15