REPORT

EXTERNAL EVALUATION OF INJINI - AFRICA'S EDTECH INCUBATOR PROGRAMME

Submitted to Injini

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JET EDUCATION SERVICES

RESEARCH | IMPLEMENTATION | MONITORING & EVALUATION

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Acronyms

B2B	Business to Business
B2C	Business to Consumer
B2G	Business to Government
CiTi	Cape Innovation and Technology Initiative
DAC	Development Assistance Committee
DEDAT	Western Cape Department of Economic Development and Tourism
ECD	Early Childhood Development
ED	Enterprise Development
FICA	Financial Intelligence Centre Act
M&E	Monitoring and Evaluation
MSDF	Michael and Susan Dell Foundation
OECD	Organisation for Economic and Cooperation and Development
ToC	Theory of Change
TVET	Technical Vocational Education and Training
WCED	Western Cape Education Department
WCG	Western Cape Government

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EXECUTIVE SUMMARY

Introduction and background

The goal of Injini is to improve education outcomes across Africa through supporting EdTech entrepreneurs with solutions that are evidenced-based, effective and scalable, and can address challenges of access and quality. The Injini programme comprises four main components:

1. Recruitment and selection, which includes in-country promotional events by the Injini team, six rounds of selection of the top applications by Injini till the top 15 and then selection of the top 8 by a panel of judges

2. Provision of equity funding

3. Incubation, which consists of day to day problem solving support, education content and product support, expert workshops, mentoring and advice on business, access to networks and connections to funders and other partners; and

4. Post programme support where the Injini team supports the startups with growth planning and networking.

There were 170 applications for cohort 1 and 805 for cohort 2. The applications for cohort 2 were mostly K12, that is education from early childhood development to the final year of secondary school (47.6%), with only 3.5% of the applications exclusively focused on early childhood development (ECD). The quality of applications for cohort 2 varied, with some applications not EdTech, having underdeveloped ideas, and proposing solutions without a solid evidence base. A majority 59.6% of the applications were at pre-product stage, and over 8% were already earning annual revenue of over $15k. A significant 46% of the applicants had been on an entrepreneurial programme before, 18% of them on the Tony Elumelu programme.

The gender composition of cohort 2 primary applicants was 80% male and 20% female, with 58% of the applicants younger than 30 years. 5% of the applicants to cohort 2 had applied to Injini for cohort 1.

The Injini Africa's EdTech Incubator programme took its first cohort of eight startups through a six-month incubation programme from October 2017 to May 2018, and its second cohort of another eight startups through a five-month incubation programme from July to November 2018. The interventions for cohort 1 provided solutions for challenges with access to affordable good quality teaching and learning resources in primary and high school, ineffective teacher professional development, language barriers to service delivery, and poor access to funding for tertiary studies and career awareness. The solutions for cohort 2 addressed problems of low literacy levels, paper-based school administration, poor language teaching, poor quality of teaching and learning and of resources, lack of finances for tertiary studies, and poor employability skills. Only two startups between the two cohorts focused on ECD, one of them exclusively

and the other, on ECD and K12. Six startups focused on K12 while four focused on skills development. Two companies focused on both university and skills and another two on both K12 and skills.

The home markets of the startups in the two cohorts are in seven African countries: Ethiopia, Kenya, Nigeria, South Africa, South Sudan, Tanzania and Zimbabwe. South Africa has the largest share of startups, with six startups selected across both cohorts, followed by Nigeria with three startups all selected in the second cohort. The following table shows the distribution of cohort 1 and 2 startups selected across the continent:

Country	Number of startups selected		
	Cohort 1	Cohort 2	Cohort 1 and 2
Ethiopia	1	1	2
Kenya	1	1	2
Nigeria	-	3	3
Tanzania	1	-	1
South Africa	4	2	6
South Sudan	1	-	1
Zimbabwe	-	1	1
Total	**8**	**8**	**16**

The external evaluation

In December 2018, Injini commissioned JET Education Services to conduct an external evaluation of the Injini Africa's EdTech Incubator programme. The data collection for the evaluation was conducted from January to March 2019 and focused on cohorts 1 and 2. As such, the evaluation does not reflect on or discuss changes that may have occurred to the programme after cohort 2. Injini is a dynamic company and is always changing processes to be more effective, so changes may already have happened after cohort 2 that are not reported on in this report.

Approach and methodology

The evaluation was qualitative and intended to answer 10 key questions about the relevance of the programme, its effectiveness, impact, scalability and sustainability. The Organisation for Economic Cooperation and Development (OECD) Development Assistance Committee (DAC) evaluation criteria were used to cluster the evaluation questions thematically based on these criteria, as mapped out in the table below:

Evaluation Criteria	Evaluation Questions
Relevance	1. Is this a high-need area that is receiving insufficient attention? • What is unique about Injini's contribution? • Is the support provided to startups appropriate?

Evaluation Criteria	Evaluation Questions
	2. Is the opportunity relevant to the needs of vulnerable children and people of low socio-economic status?[1] • Are the innovations selected and their implementation well positioned to address the needs of vulnerable children and people of low socio-economic status? • Are selection criteria matched to the intended objectives of the programme? • How flexible are delivery mechanisms, and are these mechanisms appropriate to intended beneficiaries?
Effectiveness	3. Does the programme identify and engage with the appropriate stakeholders, which will likely ensure the success of the programme? • How well is Injini liaising with relevant stakeholders? • How well, given the difficulties of working with government, is Injini liaising with policy practitioners? • Are there early indications that Injini is managing to build the right partnerships? 4. Is the support provided to startups adequate and effective? 5. What are the monitoring and evaluation systems in place for Injini and supported startups? • How is Injini planning to share best practice? • Does Injini equip its cohort companies to track impact? • Does Injini sufficiently track the post programme performance of cohort companies? • Is the programme amenable to an impact evaluation in future? • Is there sufficient data in the area to ensure positive impact and wider scale adoption? Since the programme is still in its early stages, what can be done/is recommended to gather data to assess the extent of impact & adoption?
Impact	6. Can this program catalyse a significant change in thinking, bringing EdTech forward? • Does Injini offer a unique opportunity for EdTech startups to fast track their progress compared to before they joined the programme? • Is Injini well structured to positively impact the commercialisation of ideas and business development?

[1] This question is relevant to UBSOF, an Injini funder. The reference to vulnerable children is relevant to UBSOF funding criteria.

Evaluation Criteria	Evaluation Questions
	• How does Injini's programme support innovation related to revenue streams and models of revenue generation? 7. Is this programme likely to strengthen human resources among the EdTech startups it supports? • Is Injini contributing to building strong EdTech ecosystems in the African countries and cities in which it operates? • Are there indications that Injini is on track to increase the understanding of the challenges and opportunities within the *organisations* that they fund? • What is the empirical evidence for innovations selected into the programme to improve outcomes and/or employability?
Scalability	8. Is this opportunity feasible, scalable and replicable (based on evidence from programme implementation)? • Could Injini roll out this programme to more companies, regions or countries? • What can be learnt from implementation of the programme **about scaling up**?
Sustainability	9. Is Injini on track to develop startups that are sustainable businesses 18 months post-programme? 10. What can be done to ensure that this programme contributes to improved policy and practice to ensure lasting benefits, particularly in the case of lasting positive outcomes for vulnerable children and people of low socio-economic status?

The questions were developed collaboratively by JET and Injini.

A sample of eight startups purposively selected to cover different geographic areas, education stages and interventions were engaged through a survey, followed by a telephonic interview which lasted between 30 minutes to an hour. All eight startups completed the survey and the interview. Two staff members of the Injini team were interviewed for the evaluation, for about two hours, and extensive documents were reviewed including pitch decks by start-ups, progress reports by the startups and Injini, cohort 2 theories of change for startups, and strategy documents for survey startups. The interview with the Injini staff was audio recorded and transcribed in full and interviews with the startups were recorded in detail for analysis. Interviews were analysed thematically based on the evaluation criteria.

Limitations to the evaluation include the small sample of surveyed and interviewed startups, and the fact that it was not possible to engage other stakeholders like mentors and experts who had provided support to the programme. Further, there was no means of verification of reported success by startups, as beneficiaries of interventions were not engaged. It was also not possible because of the scope of the evaluation to conduct a literature review of other empirical work on incubators and EdTech. As such, the evaluation findings cannot be benchmarked using other research and evaluation on incubation or EdTech startups.

Key findings and discussion

Programme relevance

The selection criteria for the startups is consistent with Injini's goal to support startups with evidence-based solutions that are likely to succeed in making education more accessible, better and more effective to improve education outcomes. These selection criteria led to the selection of ECD, K12, tertiary and skills interventions that are addressing specific access and quality issues. The delivery mechanisms for the selected solutions, including mobile technology, feature phones, solar powered servers etc. are all appropriate to resource constrained contexts and people of low socio-economic status who cannot afford expensive devices.

The Injini programme is also relevant to startups, who struggle to gain access to finance, knowledge and skills required from ideation to product, and launching, running, and sustaining a business. Many incubators are generic, making Injini, with its focus on EdTech, unique. Injini is also regarded as unique by startups for being African focused, and for expecting the startups it supports to have solutions based on evidence. Startups also indicated that Injini provides a better financial incentive than other incubators that startups are aware of. Further, the fact that the experts who support startups on the Injini programme are themselves successful entrepreneurs is regarded as a great value add to the programme.

In the survey, cohort 1 startups rated the overall relevance of the Injini programme 3/3 and cohort 2 rated it 2.8/3. One to one sessions also received very high ratings of 2.8/3 from cohort 1 and 3/3 from cohort 2. The relevance of equity-based finance was rated 3/3 by cohort 1 and 2.5/3 by cohort 2; while networking sessions were rated highly at 3/3 and 2.5/3 by cohorts 1 and 2 respectively. Startups pointed out that the support from individual Injini team members as well as the funding were catalytic in the development of their businesses.

Programme effectiveness

Partnerships

Injini's success in building partnerships with stakeholders has been mixed. Injini has been successful in getting funding from three funders for the two cohorts. Successful relationships have also been built with experts who speak at events and sit on selection judging panels, and with mentors for the startups. The involvement of these successful experts and entrepreneurs at no cost to the projects is indicative of the high regard they have for Injini, by wanting to be associated with the company and assisting it to succeed.

Traction with government has been slow, characterised by many hours of engagement with government which had yielded limited results for Injini for cohorts 1 and 2 at the time of the evaluation.

Injini's success with service providers was also mixed. Injini cut ties with the Cape Innovation and Technology Initiative (CiTi) Enterprise Development (ED) team that had been contracted to assist Injini with workshops as the work of CiTi ED did not meet the high standards Injini expected. Injini contracted Hyperion to second junior tech developers to work with cohort 1 startups. This aspect was successful as some startups managed to refine their products. Hyperion support also included training, and this part of

the service did not satisfy the needs of startups, prompting Injini to adjust to a tech solution where companies could procure their own tech support.

Startups reported varied successes with partnerships. Syafunda and Mtabe clinched lucrative partnerships with Old Mutual and Vodacom and Twilio respectively. Slatecube has partnerships in South Africa with Weber Wentzel, Afrika Tikkun, and Youth Employment Services. ScholarX has partnerships with Tenco mobile, Sterling Bank and Glo mobile, Learning Factory with the University of Virginia, Birdtracks with the Massachusetts Department of Early Education and Care, and Langbot with Alliance Française in Addis Ababa.

Effectiveness of programme aspects

Multiple programme areas were explored to determine programme effectiveness. Of the seven surveyed startups that completed the programme, six indicated the programme's length was fine and this included three who had completed the six-month cohort 1 programme and three who had completed the five-month cohort 2 programme. The only startup founder who thought the programme was too long raised concerns about the requirement to stay in Cape Town for startups whose home markets are outside Cape Town. Two startups, including one that reported that the programme was of the right length indicated that being in Cape Town took them away from developing and testing their products for too long, as some aspects of their product could not be developed remotely because a lot of instructions needed to be finalised before the documents were developed. This required startup staff to be in the home country and interact with users to get feedback for further programme development. The duration of the programme was reduced by a month in cohort 2, and the programme split into 3 phases: **Phase 1** residential in Cape Town, **Phase 2** where startups could return to their home base before returning to Cape Town again to complete the programme in **Phase 3**.

Adequacy of programme aspects was mostly rated highly by both cohorts (from 2/3 to 2.7/3) although some concerns were raised about poor preparation for pitch day, unclear goals and objectives for pitch day, and the challenges of pitching for a diverse audience. Cohort 1 startups have a low rating of 1.7/3 for adequacy of equity based finance because of the challenges they had with disbursement of funds and effect of a weakening rand on their funding.

Startups were generally positive about the effectiveness of the programme, with a majority of programme aspects receiving average ratings of 2.3/3 to 3/3. Aspects which were singled out in comments as being effective are: training workshops which focused the startups on the business aspect of their companies; the pitch days which led to partnership links and subsequently partnerships; mentors who helped sharpen understanding about revenue models; the one on one sessions with the Injini team which assisted with business strategy; and post incubation support which provided startups with guidance beyond the incubation period.

Although overall satisfied with the effectiveness of the programme, there was disgruntlement with the equity-based funding by cohort 1 startups, who rated it 1.7/3 for effectiveness, based on the aforementioned reasons.

Monitoring and evaluation

Injini has proved itself to be agile in reacting to programme aspects that needed changing to improve programme implementation. They were continuously internally reviewing the programme and making changes. The capacity of startups on M&E was built through a workshop, and cohort 2 startups all developed a theory of change. The theories of change for the startups could be improved by mapping assumptions about business development and growth along the pathway to change.

Confidence levels of startups with Injini

Injini's net promoter score from the survey was 50%, with more than half of the respondents emerging as promoters of the incubator. This is positive feedback for the creation of an alumni network for Injini.

Programme impact

Startups regarded the programme as impactful, and data from both cohorts shows that for most startups, business strategy had changed because of advice from Injini and mentors, and knowledge provided on the programme. Models changed mostly from business to consumer (B2C) to business to business (B2B). Some companies reported that they have started earning revenue or have increased their revenue and improved their products.

Scalability

There seems to be a high demand for EdTech incubation, and Injini has several options for scaling their programme. They can scale according to geographic area, by taking startups from even more countries; volume, by increasing the number of startups from each of the existing countries; or education stage, by increasing the number of startups in currently under-represented levels e.g. ECD. Injini can continue to use partners working for free to achieve growth, establishing and making use of the alumni to help mentor new startups to success through twinning, where an existing startup pairs up with a new one and systematically mentors it, or the creation of platforms where collaboration between new and maturing startups can happen as necessary. The companies that seem to be achieving the greatest scalability are those who are in skills, particularly focusing on employability skills.

Sustainability

There is tangible evidence that the benefits accrued from Injini by startups are likely to be sustained. Whilst most startups seem to be adopting the business to business revenue model as the most viable one, there are gains likely to be achieved through diversifying revenue streams, to also include a business to government (B2G) model.

Conclusions and recommendations

In less than 12 months since the launch of cohort 1, Injini has amongst other things:

- Successfully graduated 15 of the 16 startups they selected from over 900 applications

- Laid a strong foundation for the startup that did not go through with the others to complete the development of its product
- Supported 15 startups in seven African countries with business development knowledge and tech expertise
- Created a strong network of business, education, and tech experts and mentors who can assist Injini in the selection of startups and work with startups, suggesting that they see value in Injini's programme and want to be associated with it and assist in making it successful.
- Supported all 15 startups to grow their business post programme
- Displayed adept adaptive management skills to improve implementation of the programme.

The businesses that Injini has helped grow, have amongst other things:

- Opened access to education for people from low socio-economic status by using delivery platforms that are cheaper and effective
- Created employment for people in their businesses
- Formed strategic partnerships for business growth
- Started earning revenue from their businesses, or increased their revenue
- Developed a better understanding of business strategy and are employing this to get or increase revenue
- Expanded their businesses beyond their home markets
- Indicated that they have found the Injini programme a high value programme.

Six Injini startups, Langbot, eLimu, M-Shule, ScholarX, Zelda, and Mtabe, were among the 10 African startups competing against 24 other finalists for the Next Billion EdTech Prize in Dubai in March 2019.

Injini's success with the two startup cohorts not only addresses the challenge of poor education outcomes, but also addresses the problem of youth unemployment through establishment of successful startups that can employ other youth while improving the quality of Africa's future entrepreneurs and workforce.

With such a high impact programme, the sustainability of Injini should be a priority for funders and governments. The following recommendations can increase the likelihood of Injini's sustainability and enable improvements to the programme for future cohorts:

Relevance

The relevance of the Injini programme is undoubted. What seems to be in doubt, given the difficulties with funding for subsequent cohorts, and uptake by government, is the relevance of Injini to some stakeholders. With the achievements listed above, Injini needs to now develop a strong value proposition, drawing on evidence of success with the startups, and evidence on improvements in education outcomes emerging from the interventions. The strong value proposition can be used to raise funding and garner support from other stakeholders to strengthen Injini, as well as procure business for the alumni.

In terms of relevance of aspects of the programme, a useful suggestion has been made to review the possibility of having different pitch days for different stakeholders, that is, pitch day for funders which is separate from pitch day for customers so that the pitches are targeted for specific audiences.

The point was raised about having to attend workshops that people do not need, and a suggestion was made for workshop attendance to be optional especially for startups that have been on other entrepreneurial programmes that offer similar workshops content.

Effectiveness

Most programme aspects were reported to be effective, and there is room for improvement on a few. To improve the effectiveness of the programme, in future:

- Disbursement issues particularly with foreign accounts should be anticipated and communicated timeously so that contingent plans are made by the affected startups
- Reporting templates need to be developed to standardise reporting so that comparative data that can be used to support the startups is collected. The before and after Injini reporting should be adopted as it can clearly show the change trajectory
- Good practice in reporting ought to be encouraged among startups, e.g. including dates on reports
- ToCs for startups should include business growth and development assumptions in the pathway to change for their interventions
- With two cohorts having successfully completed the programme, it would be useful to establish an alumni network which provides opportunities for continued networking and support among the startups
- Post programme support is highly valued, and it could be more structured.

Impact

The Injini programme has undoubtedly been impactful and its impact can be captured through better reporting by startups and publicising impact by Injini. Video testimonials on the website by startups who have successfully completed the programme will help promote Injini and highlight what it has achieved in its first year of the incubation programme. An impact evaluation should be planned two years from now to determine the long-term impacts of the programme.

Scalability

The demand for EdTech incubation is high, and Injini has options for expansion. Injini can continue to use a scalability mechanism of getting stakeholders to do pro bono work, and such work would include finding an entry point into government by utilising a stakeholder who is able to negotiate deals with government and has the time to do so given Injini's experience of slow traction with government. Injini can also consider diversifying its delivery channels so that it can reach more startups remotely while still offering the knowledge and skills offered currently through workshops.

Sustainability

Continued post programme support will assist the startups to grow. An alumni network will promote communities of practice that can encourage each other to persevere, and with business referrals. Alumni who have found the resources that were shared during the workshops, and the research articles from the Injini team, have suggested that there is value in having access to these resources for refresher purposes. It would be useful to create a repository of resources, including workshop presentations, that alumni can access.

1. Introduction

This report presents the results of the external evaluation of Injini Africa's EdTech Incubator programme, which was conducted from January to March 2019, focusing on cohorts 1 and 2. The evaluation had three main objectives:

1. To develop a monitoring and evaluation (M&E) framework, through an assessment of current M&E practice and recommending future practice by formalising M&E into an M&E framework;
2. Lay the groundwork for an impact assessment to be conducted at a later date (when outcomes/ impact are likely to be more evident);
3. Conduct a formative assessment on the extent to which the program has delivered against its original goals with the aim of identifying key challenges and opportunities to inform/improve the programme.

The results of objectives 1 and 2 are presented in the M&E framework, which is a separate deliverable. This evaluation report focuses on the results for objective 3, which will assist Injini and its funders determine the extent to which the programme is relevant, implementation has been effective, the expected short and intermediate outcomes have been achieved, and the implications for scalability and sustainability. The results can help Injini strengthen the incubation programme.

The report draws on data from document review, the interview with Injini staff, and the survey of and the interviews with the eight startups that were selected for the evaluation, to present its findings. In the evaluation of the programme design and implementation, the report will rely more on cohort 2 data, as the implementation of the programme evolved between cohort 1 and 2, based on internal assessment of the cohort 1 programme. The Injini staff who were interviewed confirmed in the interview with them that the evaluation should focus more on cohort 2, as this was the cohort programme that would inform future implementation of the incubation programme. However, cohort 1 data is drawn on where it is useful to elaborate some relevant aspects of the incubation programme, for example its impact, and where comparative analysis between the two cohorts would be useful.

2. About the Injini EdTech Incubator Programme

2.1 Programme overview

Injini aims to improve education outcomes in Africa by supporting local education technology (EdTech) entrepreneurs to develop, launch, and scale evidence-based quality EdTech that solves Africa's education challenges. Injini does this by selecting and recruiting cohorts of eight startups and supporting them through an incubation programme whose structure is elaborated in section 2.2 below.

For cohort 1 and 2, Injini had a small operations team, whose organogram at the beginning of the cohort 1 program had a core of four staff members (Injini Western Cape Government (WCG) Report, February 2018):

- The Director is responsible for overall leadership of Injini and day-to-day executive decision-making and leads on the company's network development - through identifying and developing

partnerships for funding and collaboration in other areas both for Injini and the cohort companies. The Director also provides support to the startups through workshop facilitation and one-on-one sessions on strategy, fundraising, pitching and other areas.

- The head of operations is responsible for day-to-day running of the Injini programme, particularly the workshops, mentoring and tech support, as well as provision of hands-on support to the startups in operational matters.
- The head of data insights and analytics is responsible for conducting research on behalf of the cohort companies and assists them to understand and implement her findings. She also runs some workshops and provides one on one support to companies.
- The EdTech specialist was responsible for EdTech research and assistance with product development. She took the lead on EdTech events run by Injini and assisted the director with the development of Injini's network by engaging relevant contacts.

The incubation programme officially kicked off in October 2017, and two cohorts had completed the programme at the time of the external evaluation.

The first intake of start-ups completed a six-month incubation programme from October 2017 – May 2018, and based on feedback from this cohort, the second cohort's programme was reduced to five months and ran from 9 July to 30 November 2018. At the time of writing this report, Injini had advertised for applications for the third cohort of the incubation programme.

The 16 startups that constitute Injini's cohorts 1 and 2 have their home markets in seven countries in Sub Saharan Africa as highlighted in table 1.

Table 1: Distribution of selected cohort 1 and 2 startups

Country	Number of startups selected		
	Cohort 1	Cohort 2	Cohort 1 and 2
Ethiopia	1	1	2
Kenya	1	1	2
Nigeria	-	3	3
Tanzania	1	-	1
South Africa	4	2	6
South Sudan	1	-	1
Zimbabwe	-	1	1
Total	**8**	**8**	**16**

The following visual map highlights the location of the startups for both cohorts.

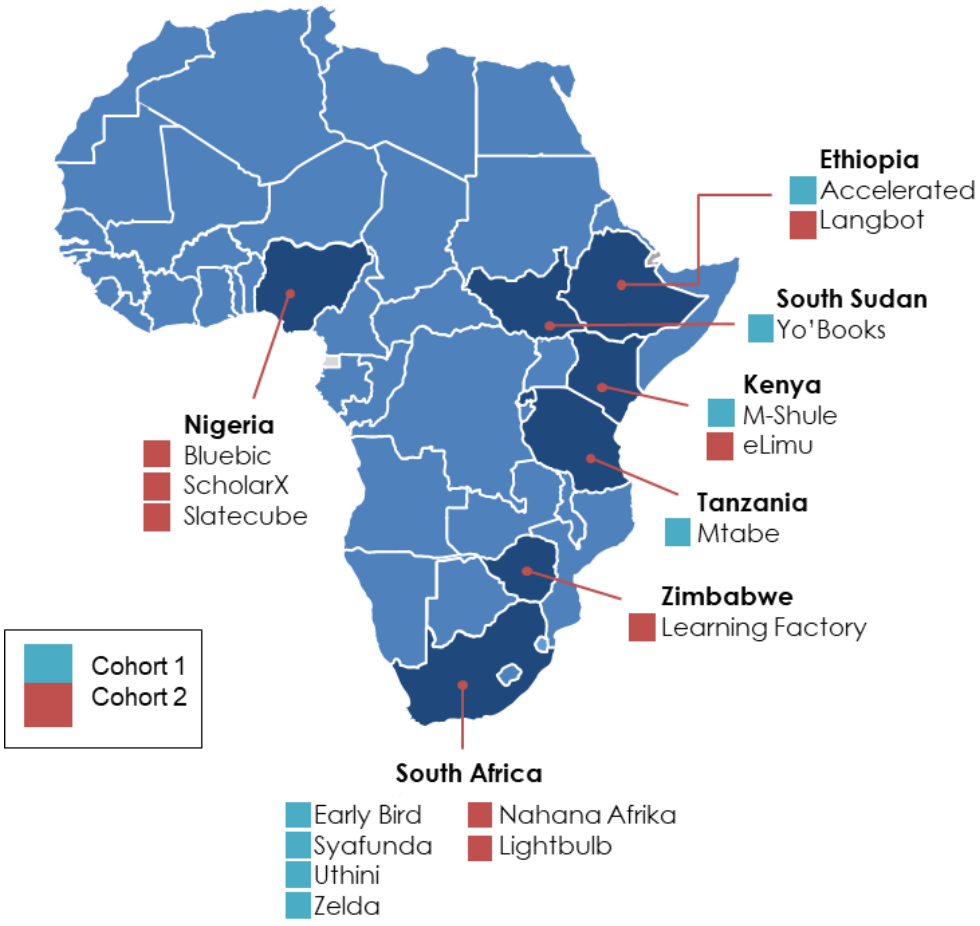


Figure 1: Map of Injini cohort 1 and 2 startups

The spread of the programme across seven countries is consistent with Injini's goal to improve education outcomes across the continent and highlights geographic areas of opportunity for recruitment and growing new startups.

One startup in cohort 2, Nahana Afrika, left 3.5 months into the 5 month-long programme because it took the startup a long time to define its product. Without a satisfactorily defined product, the South Africa focused funder (MSDF) was reluctant to give equity funding to the startup, which led to its eventual withdrawal from the programme.

2.2 Structure of the programme

The Injini programme has four interventions: (1) recruitment and selection; (2) provision of equity funding; (3) incubation programme and (4) post programme support.

2.2.1 Recruitment and selection of cohorts

The recruitment of startups starts with several promotional events before the call for applications is made. The evaluation team analysed selected aspects of applications data for cohort 1 and drew on the analysis of cohort 2 applications data done by Injini.

2.2.1.1 Cohort 1

There were 171 applications for the cohort 1 programme, and most applicants indicated they had heard about the Injini programme through a friend or by word of mouth[2] as highlighted in figure 2.

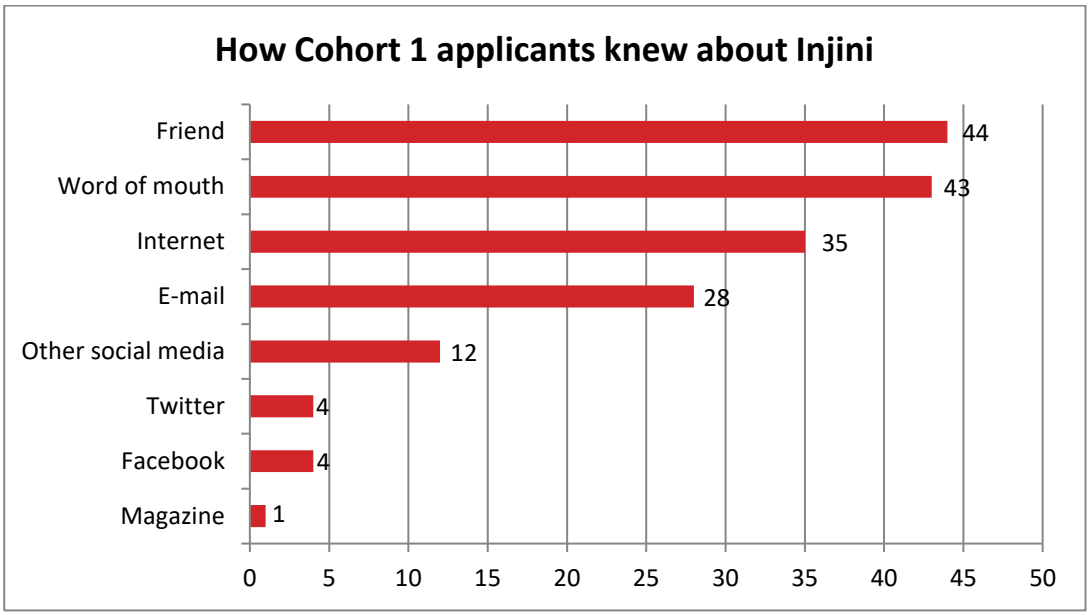


Figure 2: How cohort 1 applicants knew about Injini

Source: Injini cohort 1 application data

Eighty-seven applicants answered the question about whether they had been or were on another entrepreneurial programme before, and 47% responded in the affirmative. The data on the programmes they had been on did not show any patterns of high affinity to specific programmes, with the only programmes mentioned by more than one applicant being the Tony Elumelu, Telkom and Sinapis Entrepreneurship Training programmes.

South Africa had the highest number of applications as shown in the figure 3 overleaf.

[2] These categories look similar but were presented as distinct on the application form. The analysis did not combine them as word of mouth could have been attendance at an Injini event, versus being informed by a friend.

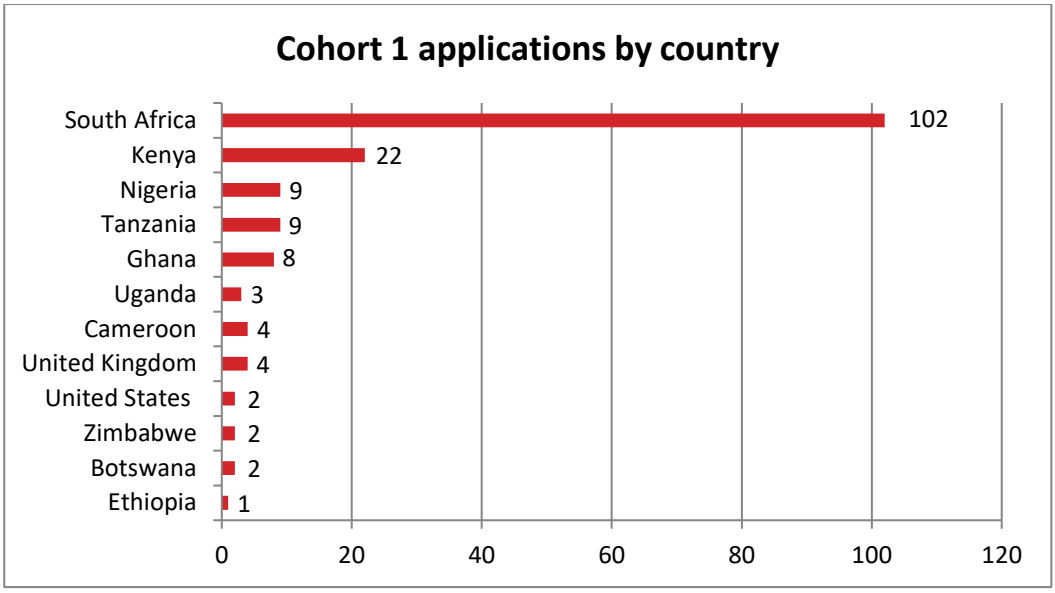


Figure 3: Cohort 1 applications by country

Source: Injini cohort 1 application data

Male applicants constituted 76% of applicants while female applicants constituted only 24%. The average age of applicants was 35, and 61% of the applicants were between the ages of 18 – 30.

Cohort 1 startups are highlighted in figure 4 below. The startups focused on different stages of education, from ECD, primary and high school, and university level education, to continuing professional development.

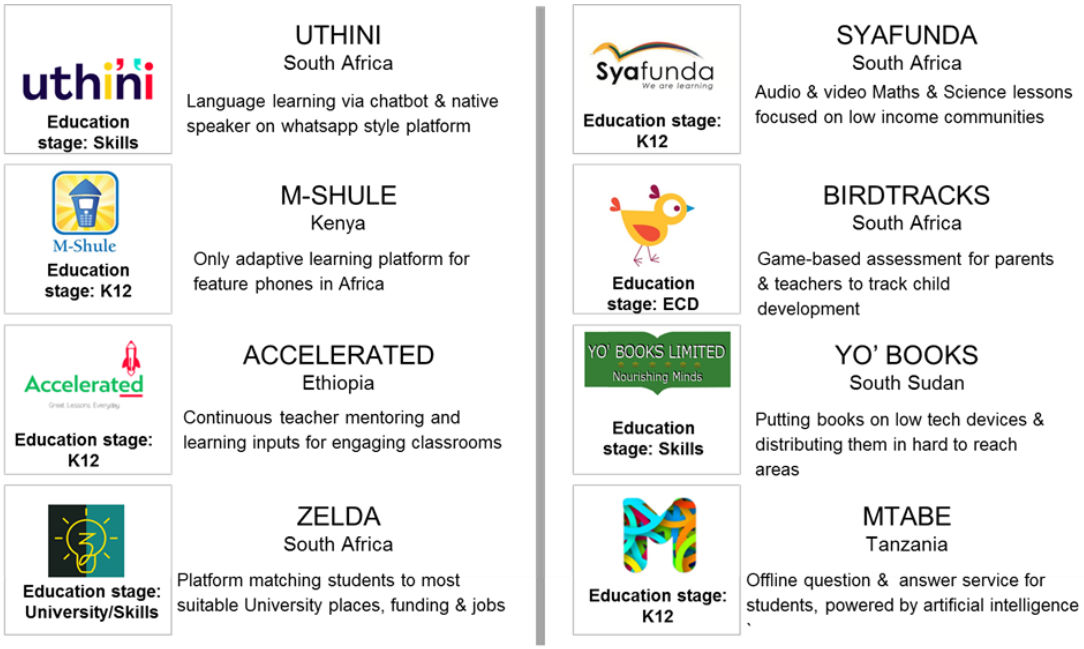


Figure 4: Overview of Injini Cohort 1 startup products and educational stages

Source: WCG Injini Report, March 2018

2.2.1.2 Cohort 2

The surge of applications from 170 for cohort 1 to 805 for cohort 2 points to the demand for the Injini programme. Of the 805 applications for cohort 2, Nigeria had the most applications (252), followed by South Africa (173). The top 10 of applications for cohort 2 are presented in figure 5.

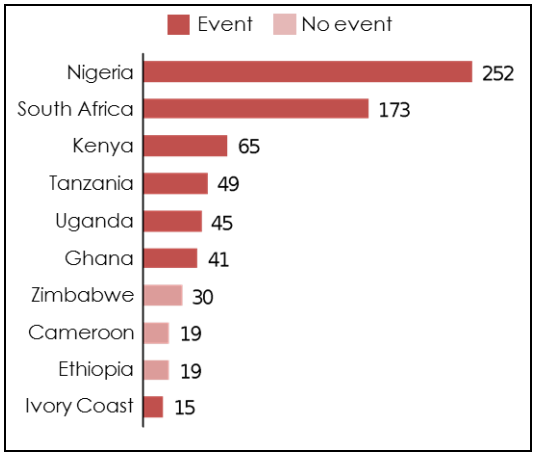


Figure 5: Injini Top 10 applications for Cohort 2

Source: Injini, Analysis of cohort 2 applications

Before advertising for cohort 2 applications, Injini held multiple events in Lagos, Accra, Nairobi, Dar es Salaam, Kampala, Cape Town and Abidjan, to promote the programme and learn more about EdTech in each country. Up to 60 people attended each event, although attendance was sometimes much lower than the sign up for some of the events (Injini, March 2018). The highest number of applicants came from countries where there had been promotional events.

The high number of applications from a country was not necessarily reflective of the quality of applications. Nigeria, which had the highest number of applications only had 14% of these in the top 15% of applications, compared to Uganda which had 29% of their 45 applications in the top 15%, and Benin, which had its only application making it to the top 2.5%. The number of applications per country are juxtaposed with the number of applications from those countries that were in the top 15% and top 2.5% respectively, in figure 6.

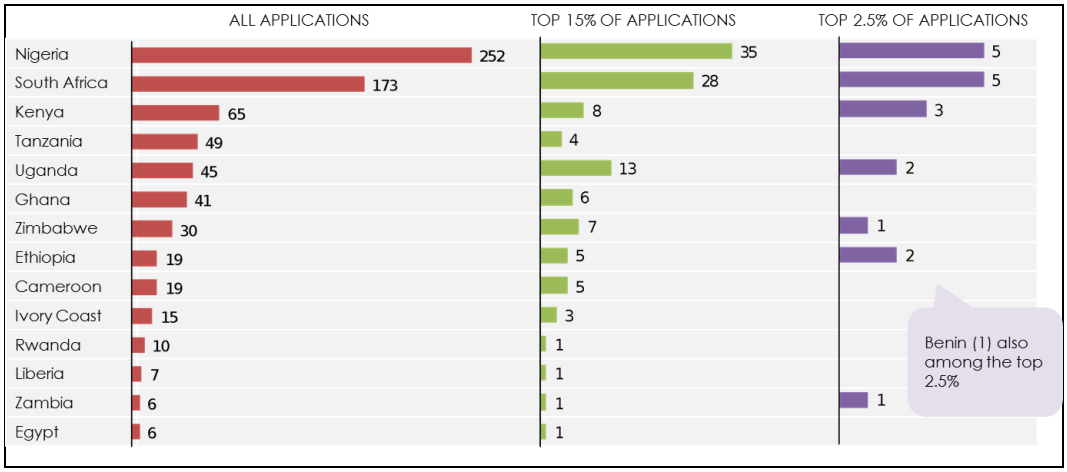


Figure 6: Cohort 2 highest application countries and their performance in the top 15% and top 2.5%

Source: Injini, Analysis of cohort 2 applications

Injini's analysis of common reasons why applications were rejected sheds light on some of the quality issues with the applications. Some applications showed **weak team and company structure**, with founders who would not commit full-time to their business, had no developers or tech capability within the company, or had significant equity held by external parties (e.g. an investor with a large or controlling stake).

Underdeveloped ideas including lack of traction after several years of working on an idea or having non-distinct or unclear ideas for a product/service discouraged selectors. Applications with products or services that were not education-technology, from fields like agriculture and health, were not considered. Some ideas were not **relevant** for solving Africa's educational challenges and others **contradicted** evidence on what works in education. Other applicants failed because they were looking for venture capital, or angel investment, which Injini does not provide.

The most dominant education stage among the applications was K12[3], followed by tertiary, with ECD constituting a marginal number of the applications as reflected in figure 7.

[3] K12 is the term used in the United States, Canada and other countries to describe the educational stage from Kindergarten, and Grades 1 – 12.

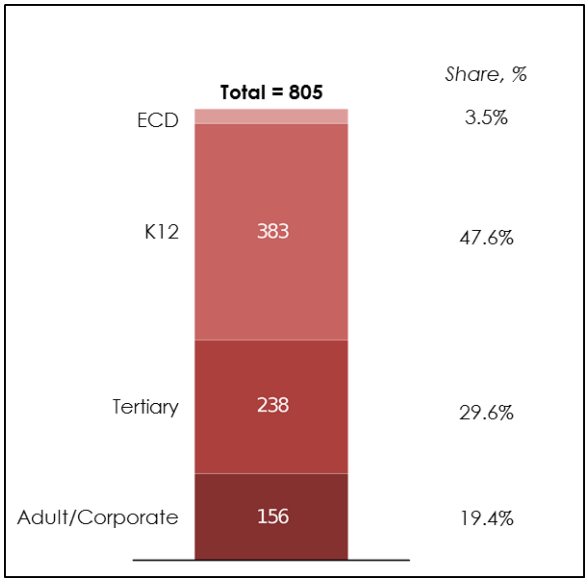


Figure 7: Cohort 2 applications stages of education

Source: Injini analysis of cohort 2 applications

The product stage that applicants were mostly at was pre-product as reflected in figure 8, which shows that 59.6% of the applications were at this stage.

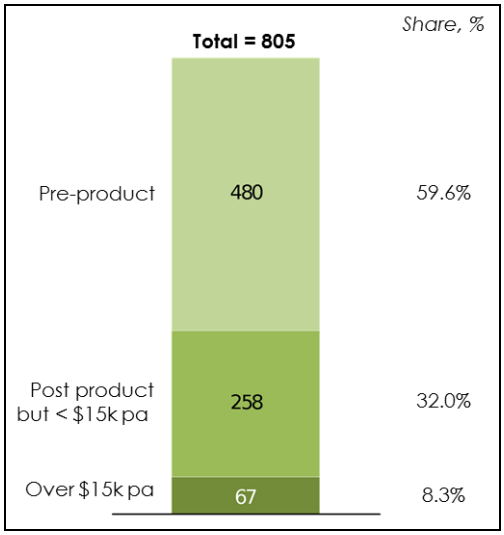


Figure 8: Stages of product development of cohort 2 applications

Source: Injini Cohort 2 applications analysis

A significant number (32%) of the startups already had products with an annual revenue of less than $15 000, while 8.3% who also had products were generating over $15 000 annual revenue.

Other significant finds from the data for cohort 2 applications is:

- 80% of applicants were male and only 20% female
- 58% of applicants were younger than 30 years

- 5% of applicants had applied for cohort 1

Like some cohort 1 applicants, a significant number (46%) of cohort 2 applicants had participated or were participating in another entrepreneurial programme, with 18% indicating that they had been on the Tony Elumelu programme which had been attended by 5% of cohort 1 applicants. A quick search about this programme revealed that it is the largest African philanthropic entrepreneurial initiative, which received 216 025 applications for the 2019 cycle whose applications closed on 1 March and has to date funded 7 520 entrepreneurs (https://tonyelumelufoundation.org/).

Injini went through a rigorous selection process for cohort 2 which ran over several days and included the following process as detailed by Injini:

- The Cape Innovation and Technology Initiative (CiTi) shortlisted 100 applicants from the 805 applications
- Injini and CiTi narrowed the shortlist down to the top 20
- CiTi communicated to the 20 shortlisted applicants that they had made it through to the next round of the selection process, and informed the unsuccessful candidates
- The 20 startups sent videos of their team to CiTi and Injini and CiTi did due diligence (collecting company documents, getting evidence of claims made in the application etc.)
- CiTi and Injini selected the top 15 for pitch day from the videos and communicated with startups about pitch day. The five who did not make the top 15 were also informed and reasons for rejection provided
- Travel arrangements to Cape Town were made for South African based startups that were in the top 15
- A panel made up of funders (Western Cape (WC) government and Michael and Susan Dell Foundation (MSDF)) educators, the Injini team, the Injini board (CiTi) picked the final 8 on pitch day, and identified the startups ranked 9 – 11 in case of any withdrawals from the selected 8
- Injini communicated with the selected 8 and informed the three applicants ranked 9 – 11 that they were on the shortlist and also informed them about when they would hear of the final outcome
- Injini also communicated with those in the top 15 who had not been selected for the cohort, informing them of the reasons why they were unsuccessful.

The selection of the eight startups was done by a judging panel of 11 judges for cohort 1, and 12 judges for cohort 2, comprising funders, partners, investors, and the founder of Injini. The Injini staff who were not on the judging panel also did their own judging on the side lines for comparison with the judges' benchmarks. The judges were given a clear brief by Injini, with the following criteria for selection of startups:

- *A team with the talent (including tech) experience to succeed*
- *An idea that is well thought through and that solves an important education problem*
- *Practical use of tech to make education better/cheaper/faster, but does not have to be space age*
- *Relevant to most of the population, and many countries*

- *Early Childhood Development (ECD) or primary as a priority focus*
- *Alignment with the Western Cape Department of Economic Development and Tourism (DEDAT)/and the Western Cape Education Department's (WCED's) goals for digital education*
- *Evidence supports or at least does not contradict the idea [4](Injini Cohort 2 selection day judges briefing 23 April 2018).*

Criteria included that which would meet Injini's goal to improve education, as well as focus areas for funders, ECD for UBS and alignment with the WCED's and DEDAT's digital goals because of the funding by UBS and the Western Cape Government (WCG).

Like the cohort 1 startups, the cohort 2 startups had diverse interventions at various educational levels, as summarised in Figure 9.

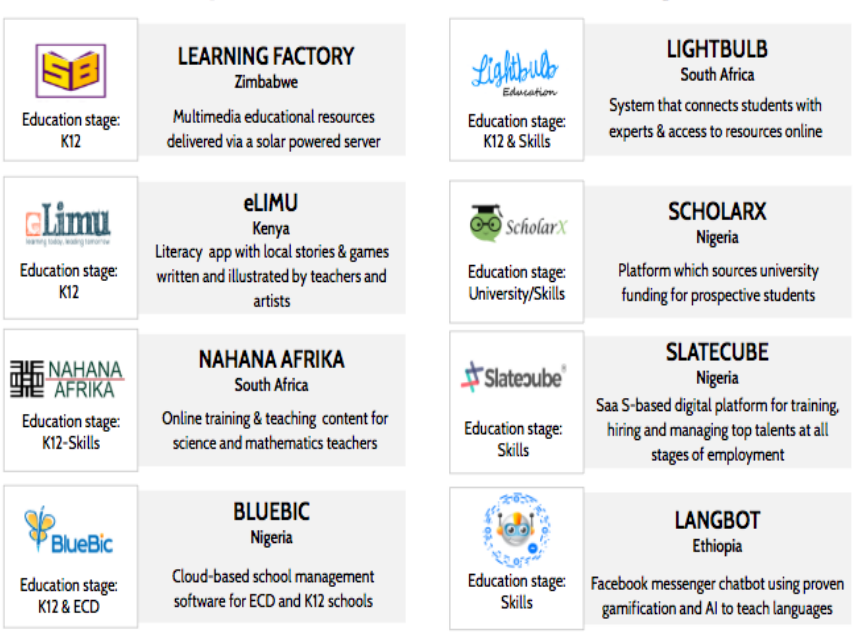


Figure 9: Overview of Injini Cohort 2 startup products and educational stages

Source: Injini Exco Deck

Cohort 2 comprises fewer startups from South Africa than cohort 1 and introduces startups from new countries (Nigeria and Zimbabwe). There are also more companies in cohort 2 with a dual focus on education stage – four companies in cohort 2 had a dual focus compared to only one in cohort 1.

[4] The shortlisted finalists presented a pitch deck to the judges, and one of their slides provided the empirical evidence about the problem for their solution. The solution had to be well aligned with the problem.

2.2.2 Provision of equity funding

Cohorts 1 and 2 received equity-based finance of R500k - 600k, for an equity stake of up to 15% for Injini, although this could be lower depending on the startup's valuation. Startups provide a budget of what they will use the money for (which were made available to the evaluation team), but Injini does not monitor expenditure through financial reporting from startups, trusting that the startups will use the money for the intended purposes as specified in their budgets. The Injini staff elaborated in the interview:

> *We trust startups as businesses, they are independent businesses who we are investing in, we are not running them, they are not doing a project we are managing, they are entrepreneurs, running a business that we have chosen to support. If we don't trust them [to manage the funds we give them on their own], then we should not give them the money in the first place* (Injini staff interview).

This view is consistent with the fact that startups who stay on the programme till the disbursement of the first tranche of the funding, eight weeks into the programme are committed to their business and Injini programme.

2.2.3 Incubation programme

When the startups have been selected, implementation of the three-phase five-month[5] incubation programme starts. For cohort 2, **Phase 1** was **nine weeks** long and was a residential component in Cape Town, where startups were equipped with knowledge and skills on business development, learning design, sales, impact measurements, and ended with the startups presenting their pitch on pitch day. The engagement with the startups during Phase 1 was through workshops, one to one sessions with the Injini team and experts, and with mentors. **Phase 2** was **six weeks** long and the startups went back to their home markets for user testing, business development, marketing and sales. The Injini team actively supported this process in the startups' home markets. **Phase 3** was **five weeks** long and the startups came back to Cape Town from their home markets to prepare for demo day through sprints. After demo day, the startups headed back to their home markets. This incubation programme is summarised in figure 10 overleaf.

[5] The programme was six months long for cohort 1, and adjusted to five months for cohort 2

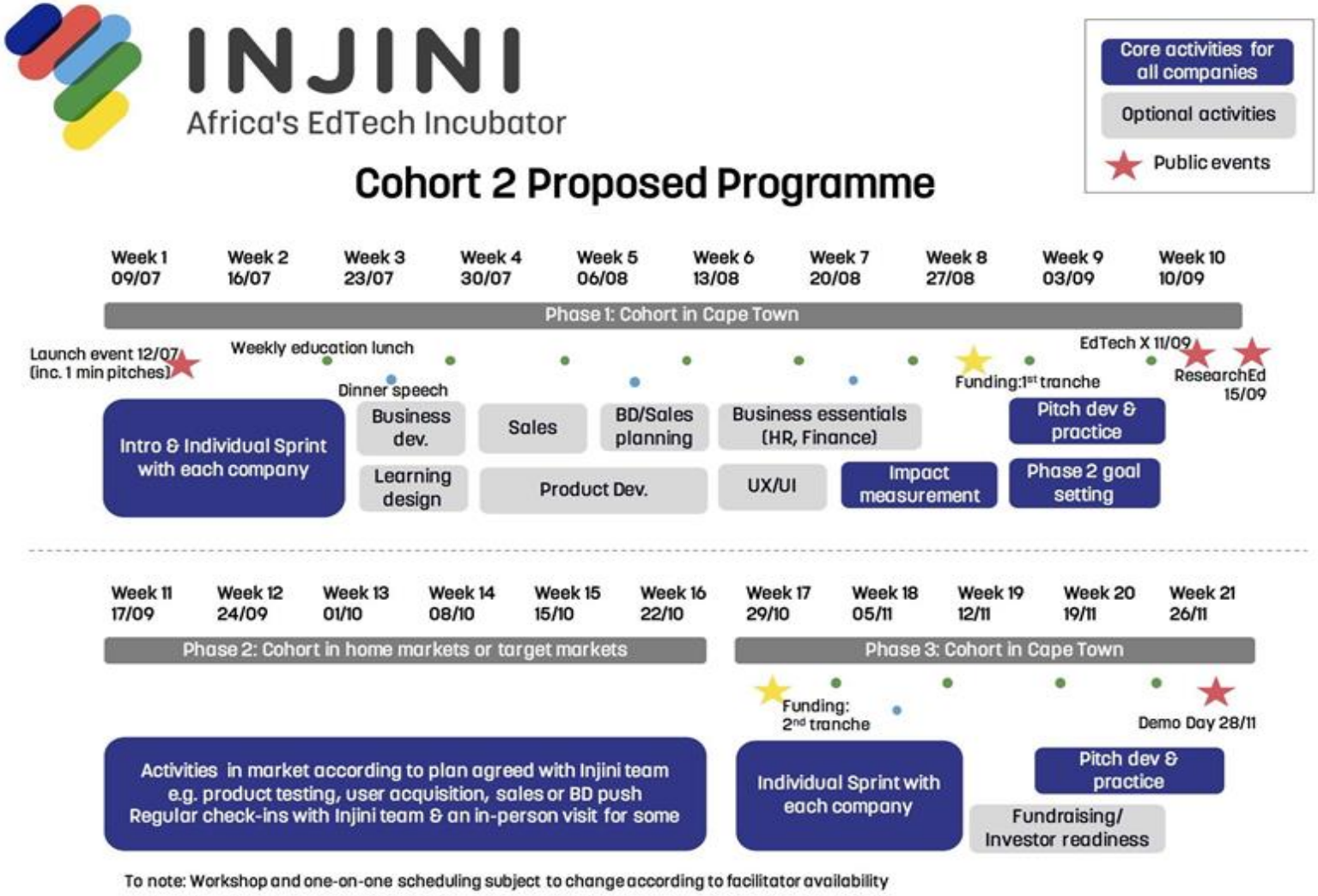


Figure 10: Cohort 2 incubation programme

Source: Injini close out report to the Michael and Susan Dell Foundation, January 2019

2.2.4 Post programme support

The Injini team provided support to cohort 1 and 2 startups back in their home markets with in-person support in South Africa, Tanzania, and Kenya. Some startups received multiple visits in their home countries. Support was also provided telephonically or via email; the phone calls or email conversations or meetings lead *"… to what specific support startups need, such as introductions to people, advice on people to talk to on an issue, reviewing something they did, suggesting changes*". Outside of scheduled meetings, startups can contact the Injini team at any time to ask for support, including introduction to funders and assistance with applications for funding. This assistance has resulted in positive outcomes for one of the startups focusing on ECD that received funding from a funder based on Injini assistance. Injini is looking to systematise and continuously improve the post-programme support as there is now a sizeable and growing alumni which elevates the significance of this component of the programme and the need to continuously improve it to serve the alumni better.

3. Evaluation Approach and Methodology

3.1 Evaluation questions

The evaluation sought to answer questions to evaluate the relevance of the programme, how effective it was, what its impact was on startups, how scalable it is, and whether there were signs that the programme is supporting startups that become sustainable. The focus on relevance, effectiveness, impact, scalability and sustainability speaks to issues about the design, implementation, and outcomes of the programme. **Relevance, effectiveness, impact** and **sustainability**, are part of the Organisation for Economic and Cooperation and Development (OECD) Development Assistance Committee (DAC) evaluation criteria. The DAC criteria provide an appropriate framework for synthesising and consolidating evaluation findings and are based on the notion that evaluation is an assessment "to determine the relevance and fulfilment (appropriateness) of objectives, developmental efficiency, effectiveness, impact and sustainability" of efforts …. (OECD, 1991. The DAC criteria used by JET for the Injini evaluation are:

- **Relevance**: the extent to which an intervention is suited to the priorities and policies of the target group, recipient, and funder.
- **Effectiveness**: the extent to which an intervention achieves its intended objectives.
- **Impact**: positive and negative changes produced by an intervention, whether these have been produced directly or indirectly.
- **Sustainability**: whether the benefits of an intervention are likely to continue after the programme supporting it has come to an end.

The criterion of **scalability,** which is not one of the DAC criteria, but is necessary for the evaluation was added to the criteria. **Scalability** is about the extent to which an intervention can be expanded.

The evaluation questions were initially developed by Injini and shared with JET for discussion and refinement. JET reviewed the questions and suggested changes which Injini agreed to, and the questions were finalised collaboratively with Injini. The changes that were made pertained to reducing the scope of a question which sought to establish the impact of Injini's work on the African continent in line with what was realistic to measure at the time of the evaluation. The suggestion was made to rather measure the impact on the cohort of startups as this was specific, measurable, and realistic. The scope of some questions was broadened, e.g. where a question was asking about the impact on teachers, this was opened to beneficiaries because not only teachers were benefitting from the interventions. The exact changes made to questions are noted in footnotes in the evaluation questions below.

Table 2 groups the evaluation questions according to the evaluation criteria.

Table 2: Evaluation questions

Evaluation Criteria	Evaluation Questions
Relevance	1. Is this a high-need area that is receiving insufficient attention? • What is unique about Injini's contribution? • Is the support provided to startups appropriate? 2. Is the opportunity relevant to the needs of vulnerable children[6] and people of low socio-economic status? • Are the innovations selected and their implementation well positioned to address the needs of vulnerable children and people of low socio-economic status? • Are selection criteria matched to the intended objectives of the programme? • How flexible are delivery mechanisms, and are these mechanisms appropriate to intended beneficiaries?[7]
Effectiveness	3. Does the programme identify and engage with the appropriate stakeholders which will likely ensure the success of the programme? • How well is Injini liaising with relevant stakeholders?[8] • How well, given the difficulties of working with government, is Injini liaising with policy practitioners?

[6] This question is relevant to UBSOF, an Injini funder. The reference to vulnerable children is relevant to UBSOF funding criteria.

[7] The question was changed from *vulnerable children* to *beneficiaries* in recognition of the wide range and scope of startups. Vulnerable children are only one group of beneficiaries, other beneficiaries are high school students, university students, graduates, teachers, etc.

[8] This question was changed from: *How well is Injini liaising with teachers and the wider education system* to *How well is Injini liaising with the relevant stakeholders*? because teachers are only one of the target groups of the Injini startups. The original question also combined two very different components i.e. beneficiaries and an education system, which made it too broad, so the change was made to focus on beneficiaries and their range rather than address too broad a question.

Evaluation Criteria	Evaluation Questions
	• Are there early indications that Injini is managing to build the right partnerships? 4. Is the support provided to startups adequate and effective? 5. What are the monitoring and evaluation systems in place for Injini and supported startups? • How is Injini planning to share best practice? • Does Injini equip its cohort companies to track impact? • Does Injini sufficiently track the post programme performance of cohort companies? • Is the programme amenable to an impact evaluation in future? • Is there sufficient data in the area to ensure positive impact and wider scale adoption? Since the programme is still in its early stages, what can be done/is recommended to gather data to assess the extent of impact & adoption?
Impact	6. Can this program catalyse a significant change in thinking, bringing EdTech forward? • Does Injini offer a unique opportunity for EdTech startups to fast-track their progress compared to before they joined the programme? • Is Injini well-structured to positively impact the commercialisation of ideas and business development? • How does Injini's programme support new innovation related to revenue streams and models of revenue generation? 7. Is this programme likely to strengthen human resources among the EdTech startups it supports? • Is Injini contributing to building strong EdTech ecosystems in the African countries and cities in which it operates? • Are there indications that Injini is on track to increase the understanding of the challenges and opportunities within the *organisations* that they fund?[9] • What is the empirical evidence for innovations selected into the programme to improve outcomes[10] and/or employability?
Scalability	8. Is this opportunity feasible, scalable and replicable (based on evidence from programme implementation)?

[9] The initial question was: *Are there indications that Injini is on track to increase the understanding of the challenges and opportunities in African EdTech?* JET has changed *African EdTech* to *organisations that they fund* as this was more realistically measurable and more useful to Injini in this evaluation which took place only a few months after the completion of the incubation programme for both cohorts.

[10] The initial Injini question indicated *to improve learning* and JET replaced it *with improve outcomes*. This is because not all startups are learning projects. There are some on enabling access, access to funds, teacher education etc. and outcomes covers the range of results from different projects.

Evaluation Criteria	Evaluation Questions
	• Could Injini roll out this programme to more companies, regions or countries? • What can be learnt from implementation of the programme **about scaling up**?
Sustainability	9. Is Injini on track to develop startups that are sustainable businesses 18 months post-programme? 10. What can be done to ensure that this programme contributes to improved policy and practice to ensure lasting benefits, particularly in the case of lasting positive outcomes for vulnerable children and people of low socio-economic status?

The evaluation criteria of relevance, effectiveness, impact, scalability and sustainability are used to frame the results of the evaluation presented in Section 4.

3.2 Research design and methodology

A formative, process and outcomes evaluation was carried out by JET with the aim to inform Injini and funders about what is working well in the implementation of the programme and how this can be enhanced. The evaluation also identified the key challenges to the programme, with a view to making recommendations about improvement.

3.2.1 Sample size

Eight startup founders were purposively sampled for the evaluation, for in-depth analysis – these startups represent 50% of the total startups incubated in the Injini programme. The startups were selected to cover a range of interventions, different education stages, and different geographic areas. Four startups were sampled from each of the two cohorts. All cohort 1 startups and three cohort 2 startups were implementing their interventions at the time of the evaluation. Nahana Afrika, a startup in cohort 2 had withdrawn from the programme because of unsatisfactory progress after more than 10 weeks on the programme. The lack of progress consequently led to one of Injini's funders, MSDF, expressing reluctance for funding to be awarded to the startup at that stage, which resulted in the founder's decision to leave the programme. The startup continued to make progress with product development after leaving the incubation programme and at the time of the evaluation was building the minimum viable product (MVP). Four startups from each cohort were interviewed – the founders were interviewed as they were the most knowledgeable about the application processes and they had all participated in the incubation programme.

Two Injini staff constituted the other evaluation respondents, so 10 people were engaged with for this evaluation.

3.2.2 Evaluation methods

The evaluation was largely qualitative due to the small number of respondents, with a survey which contained some rating scale questions that were analysed quantitatively. A review of documents supplied by Injini constituted a major part of the evaluation, and reviewed documents included application data and

reports, Injini funder reports, startup pitch decks, and startup reports to Injini. The document review of startup data focused on all 16 startups to provide information on the overview of the incubation programme as it concerned all 16 startups. Documentary data on the eight startups that were purposively sampled for the evaluation was augmented with and enriched by survey and interview data collected from these eight startups for the evaluation.

The evaluation team conducted a face to face interview with two of the Injini staff members. A self-completed survey of eight startups, four from each cohort, was distributed by email, and used to collect data on company information and perceptions of relevance, adequacy, effectiveness, and impact of the Injini programme on their companies. Follow up telephonic interviews were conducted with a founder from each company, to clarify aspects that were not clear from the survey responses, and to get further elaboration about their experience on the incubation programme and their perceptions of effectiveness and impact.

The interview with the Injini team was recorded and transcribed in full while those with the startups were captured in detail for analysis. Analysis of interviews was thematic, according to the evaluation criteria of relevance, effectiveness, impact, scalability and sustainability.

3.3 Limitations

The evaluation focused on only eight of the 16 startups to gather data on the relevance, adequacy, quality and effectiveness of the programme. This sample is adequate in providing information about perceptions of design, process and outcome, as an evaluation of the programme can never be generalised, given that it is focusing on diverse institutions with diverse interventions. Data from the startups was triangulated with an extensive review of project documentation to improve the credibility of the evaluation.

The founder of the startup that withdrew from the cohort 2 programme in Phase 2 was unable to talk about impact beyond the startup's participation in Phases 1 and 2 of the Injini programme. Although the founder of this startup had not completed the programme, she had participated significantly and the withdrawal of the startup provided a useful deviant case for the programme, which had a 94% retention and completion rate at the end of the incubation programme for the first two cohorts.

The scope of the evaluation did not allow for engagement with international literature, external stakeholders involved in various aspects of the Injini programme, users of startup interventions or an analysis of the financial statements of the startups to verify reported increase in revenue. As such, there was neither external comparative research and evaluation to benchmark the evaluation findings, nor verification of self-reported successes by startups.

4. Key Findings and Analysis

This section presents the evaluation findings and analysis based on the evaluation criteria of relevance, effectiveness, impact, scalability and sustainability. The data used for the analysis presented in this section comes from the review of documents supplied by Injini, the Injini staff interviews, and from the survey and interview responses from the sample of eight startups.

4.1 Programme relevance

In this section, the relevance of the Injini programme to education in Africa broadly, and particularly to vulnerable children and people of low socio-economic status, as well as to startups in EdTech is explored.

Key Insights

- Based on its articulated goal, and selection of startups that address specific education challenges, the Injini programme is relevant to the needs of the African education system
- The Injini programme is regarded as unique because of its focus on African EdTech, which is a neglected area
- Injini's uniqueness also comes from the fact that it expects startups' solutions to be evidence-based
- The programme was also found to be relevant by startups with overall relevance rated 2.9/3
- Startups struggle to find finance to start their businesses, and the Injini programme provided this support as well as other forms of support. The average rating of relevance of equity-based finance was 2.8/3
- Programme elements including, mentoring, training workshops etc. were rated as relevant or extremely relevant with an average rating of more than 2/3 for all aspects of the programme.

To reiterate, relevance is about the extent to which an intervention is suited to the priorities and needs of the target group, recipient, and funder. The evaluation explored programme relevance at two levels:

- Level 1: Relevance of the selected innovations to addressing educational challenges in Africa, including responding to the needs of vulnerable children and people of low socio-economic status;
- Level 2: Relevance of the programme to the needs of startups.

With respect to level 1, the evaluation explored the extent to which the innovations that were selected and their delivery mechanisms were well-positioned to address the challenges in education and the needs of vulnerable children and people of low socio-economic status on the continent. The evaluation explored three measures of relevance of the programme for improving outcomes in education broadly and for vulnerable children and people of low socio-economic status in particular: (a) appropriateness of selection criteria for innovations (b) the innovations themselves and (c) the flexibility of delivery mechanisms of the innovations.

Regarding level 2, the evaluation investigated whether there was a specific need for EdTech incubation programmes on the continent, and whether the support provided to startups was appropriate.

4.1.1 Relevance of programme to the needs of education and vulnerable children and people of low socio-economic status

Education in Africa is in a crisis, with existing systems and interventions failing to significantly increase access, improve quality and learning outcomes for most of the students, and prepare students effectively to meet the requirements for employment. Since the adoption of the sustainable development goal 4 in 2015, there has been no progress in reducing the number of children and youth who are not in school - in 2016, 263 million children and youth in Sub-Saharan Africa were out of school, constituting a fifth of the global population in this age group (UNESCO, 2018). Quality of education is so poor that after four years of schooling, about 75% of children are functionally illiterate (The Economist, 2018, quoted in Injini, 2019), and the rate is higher for South Africa, where 78% of the learners are functionally illiterate after the same period in school (Spaull, 2013, cited in Injini, 2019; Howie, Combrinck, Tshele, Roux, Palane, and Mokoena, 2018). The continent has high numbers of unemployed youths without the requisite skills for the world of work, either in formal employment or entrepreneurship.

Injini views EdTech as offering a solution to these challenges, and believes that a way to develop relevant, quality and effective, EdTech solutions is through supporting EdTech startups with innovations that are backed by evidence and are likely to succeed. These innovations should make education more accessible, better, and cheaper.

In order to evaluate whether the Injini programme is relevant to the objective to improve education in Africa and for vulnerable children and people of low socio-economic status, we reviewed the selection criteria presented in Section 2.1.2 and concluded that the selection criteria were well matched to this objective. The top applications had to exhibit well thought out ideas that **explicitly identified an educational problem** and provided an **evidence-based solution** relevant to **most of the population**, and **many countries**, and could make education **better, cheaper, and faster.** In cohort 2, **early childhood development** was prioritised**,** and applications focusing on ECD were given greater scrutiny to ensure they were evidence based and met the same stringent criteria for selection as for other applications. The poor provision of ECD is regarded as a major perpetuator of poor education outcomes in later schooling, and a focus on this stage of learning particularly on the continent addresses the need to bolster early learning, particularly for vulnerable children who may not be exposed to structured cognitive, social, and emotional development opportunities at home. The focus on provision of EdTech solutions that are cheaper, for example through negotiated zero rated data on some telecommunication networks for students to access learning materials, caters to provision of access to people of low socio-economic status, as well as those in remote and hard to reach locations.

The following table provides an overview of the education challenge that the startups are solving according to their pitch, the solution to the problem, and the delivery mechanism. This mapping shows how the innovations are responding explicitly to an educational problem and relevant to most of the population, and vulnerable children and people of low socio-economic status in particular, and how the intervention could make education better and more affordable. The data in table 3 is drawn from the pitch and demo day decks as well as cohort company progress reports.

Table 3: Mapping cohort 1 and 2 interventions

Startup	Education challenge	Solution and targeted users	Delivery mechanism
Cohort 1			
Accelerated	Ineffective teacher training which does not improve teaching skills	Personalised teacher mentoring to schools	Blended model, face to face training and app which is still being developed
Birdtracks	Lack of good formative assessment options for children at ECD level Assessment practice is time consuming and costly	Game based assessment for teachers to track child development	Apps in ECD centres
M-Shule	Lack of differentiated learning to suit different learners	Use of adaptive learning engine to measure learning level of each learner to deliver supplementary content that matches that child's learning level Learning aimed at supplementing what is taught in schools Dashboard for parents and teachers to monitor learner's progress	Short message service (SMS) so affordable feature phones can be used
Mtabe	Lack of access to quality textbooks by low income high school students	Provision of curriculum-aligned questions and answers and content to students anytime, anywhere Aiming to reach 1 million secondary students in Tanzania by 2020	App that can be used on feature phones Offline access so limited costs
Syafunda	Lack of access to quality teaching and learning resources in rural high schools Lack of access to finances for studies	Provision of digital content and libraries in low income schools through remote servers to enable rural and township students and teachers to access digital resources without going online Linking students to a platform for bursary applications	Offline servers preloaded with content and placed in schools. Servers can be accessed using any digital device
Uthini	Lack of language skills by professionals like doctors and other health professionals as well as teachers etc. hampers service delivery	Professionals who work with communities, e.g. teachers and doctors, are taught language skills to better serve the community they work in, to improve intended outcomes	Telegram messaging platform like WhatsApp so accessible
Yo'Books	Lack of access to affordable books	Supplying affordable digital books	Computers and basic smart phones

Startup	Education challenge	Solution and targeted users	Delivery mechanism
Zelda	Limited access to funding, university places and career awareness	Provides free online career guidance to high school students and links them to bursary opportunities to academic pathways that suit their strengths and personalities	Mobile app
Cohort 2			
Bluebic	High percentage of schools in Africa that use paper for administration, which is risky and can present high error margins and can be damaged. Safe storage can be expensive, and accessibility of data can be challenged	Affordable, secure, flexible, easy to use school management system	Mobile platform
eLimu	Low literacy rates	Reading app in different languages, written by teachers, illustrated by artists and voiced by actors and celebrities Stories have questions, exercises and games that enhances comprehension skills	Literacy App available on mobile devices
Langbot	Poor methods for language teaching and learning and high dropout rates in language learning courses	Use of artificial intelligence to teach languages in a conversational manner	Facebook messenger chatbot
Learning Factory	Limited access to textbooks in schools in Zimbabwe Textbooks are expensive	Low cost multimedia educational resources for students Teacher training on how to use the materials	Solar powered server Materials accessible online and offline
Lightbulb	Lack of access to expert and skilled tutors	Digital learning management system that allows users to engage with subject matter experts and access digital resources developed by experts	Cloud based system which can be accessed using any internet connectable device
ScholarX	High dropout rates because of lack of funding	Fund management for companies Loan access to students	Platform that manages funding and applications by students
Slatecube	Lack of employable skills among graduates Mismatch between skills and demand Difficulty faced by companies in recruiting	Upskills tertiary students and graduates with skills for employability in partnership with employers	Cloud based online platform

Startup	Education challenge	Solution and targeted users	Delivery mechanism
	graduates for entry level skills	Matches them to employers looking for entry level workforce Students access training for free because recruiters pay	

As can be observed from the table, the cohorts had interventions to address the challenges of access, quality, and employability skills, and offered solutions that were affordable and could reach many students and adults. The innovations that address the needs of students in rural areas and refugee communities particularly respond to the needs of vulnerable children and people of low socio-economic status. The delivery mechanisms which include mobile, online and offline platforms, capitalise on high mobile penetration to deliver interventions, making it affordable and widening access quickly. There are however a limited number of interventions that focus on early childhood development, only two of the 16 startups offered interventions in ECD which is an important area for development as some of the problems associated with later learning stem from a lack of a solid foundation at ECD stage.

4.1.2 Relevance of programme to startups

There is compelling evidence that EdTech can help alleviate some of the educational challenges on the continent. In South Africa, for example, poor access, poor quality and poor outcomes in basic education have enduring effects on social mobility and quality of life, perpetuating social inequality along racial, geographic and socio-economic lines (Moses, van der Berg and Rich, 2017).The extensive educational challenges facing the continent identified by Injini in their reports, and by the startups in their pitch decks could be addressed by EdTech. However, the growth of EdTech has been slow and although there is a huge number of incubators supporting startups, there are very few EdTech incubators focusing on the African continent – the surge of applications from 170 for the first cohort to 805 for the second is strong but partial evidence that EdTech incubation is a high interest area.

The evaluation survey asked respondents what was unique about the Injini programme, and how relevant, adequate and effective the programme was. The discussion of uniqueness, relevance, adequacy and effectiveness addresses aspects about programme design, process, and outcomes.

4.1.2.1 Uniqueness of Injini

Broadly, the Injini programme's unique contribution in supporting startups on the African continent, and the Injini team's ability of coupling the imperative to grow and scale businesses with an unwavering commitment to improving education outcomes through evidence-based quality interventions, were cited as unique. According to the Injini staff, the programme stands out because of its Pan African and EdTech foci. The Pan African focus opens opportunities for scalability, as was expressed by a startup founder during an interview:

> *… really getting down to what is relevant for your specific industry, within the African context, that was the most valuable aspect of the programme. Also because we were all African, our stories and experiences were quite similar, so you start to identify opportunities in other countries, but you also start to see that the challenges are also very similar* (Startup Interview).

The EdTech focus enables the combination of business development with pedagogic design for improving education outcomes:

> *With EdTech there is a very specific education aspect, there needs to be understanding of how kids learn, how teachers are trained, and you don't get that kind of training or workshops organised by a generic incubator. All they do is tell you what business strategy looks like for a good startup. So there is also the need to address the education issue by having a very sector specific incubator* (Injini Staff Interview).

According to Injini staff, combining the development of the educational product with sound pedagogical theory requires a strong focus on evidence and impact, which is a departure from approaches that are not critical of the technology. They elaborated:

> *What we also find interesting, is the focus on impact and the evidence for education versus just throwing our technologies at people to buy. We focus on whether they will actually work, and we increased that focus with the second cohort* (Interview with Injini staff).

One of the startups that were surveyed, like the Injini staff, mentioned the African focus as unique, and other respondents concurred that the focus on EdTech was also unique, as Injini is the first EdTech incubator in Africa. Other factors highlighted by the startups in the survey, about why the Injini programme is unique are:

- It provides direct funding along with support
- It provides hands on assistance from the Injini team and the experts
- The assistance offered is mostly tailored to each business

Acknowledging its lack of a reference point, one of the startups concurred with the view of the Injini staff about the importance of measuring impact, by pointing out in the survey that the Injini programme was comprehensive and focused on impact:

> *I haven't been part of any other incubator programmes so I have no frame of reference for the uniqueness of the programme. From what I have heard from others, however, it seems to be one of the* ***most comprehensive*** *and* ***supportive*** *programmes on the* ***continent****. There is also a* ***huge emphasis on impact in education****, which is part of why we chose an EdTech specific programme. The goal of Injini and its cohort companies is* ***never simply business success - they always aim to improve education outcomes on the continent*** (Startup survey).

Another startup highlighted the level of funding and the involvement of successful business people on the programme as distinct.

> *Compared to other programmes that I have heard about the funding is a lot more. The programme is also very good, the experts who give talks and the mentors are highly experienced and have achieved a high level of success as entrepreneurs themselves and they provide valuable advice* (Interview with startup).

A face value comparison was done by the evaluation team, of the Injini programme with the Tony Elumelu programme, which is also African focused. This programme was explored because 18% of the 370 cohort 2 applicants who indicated they had participated in an entrepreneurship programme prior to applying to Injini indicated that they had attended this programme.

The Elumelu programme has seven components, some of which are similar in approach to Injini's interventions, but differently structured. The similar components are presented in both bold and italicised font, while the other components of the Elumelu programme are just bolded in the description in the textbox below.

The **12-week startup enterprise toolkit** equips startups with basic skills to start and run their businesses at early growth stage. It covers topics on starting and scaling a business, business development, marketing strategy, effective management, product design etc., and is supported by an **online resource library** with videos, case studies, reading materials, templates etc. The programme also has ***meet-ups*** at country and state level to "*facilitate personal exchanges, formation of strong ties with one another and with local hubs and key government agencies"* (Tony Elumelu Foundation website). The **online *mentoring system*** enables startups to access mentors from across Africa and internationally who have faced the same challenges as the startups and overcome them. The **annual entrepreneurship forum** brings together African and global entrepreneurs that can connect with their startups. After completing the 12-week programme, startups become part of **the alumni network**, which is an "*online and offline network [that] promotes sector-based and geography-based communities, collaboration across Africa as well as a healthy competition* (Tony Elumelu Foundation website). Each startup on the programme receives non-returnable **seed capital of $5 000** for *to support early growth, proof-of-concept and/or enhance their business operation. This seed capital is tied to clear milestones in a well-articulated and relevant business plan (*Tony Elumelu Foundation website).

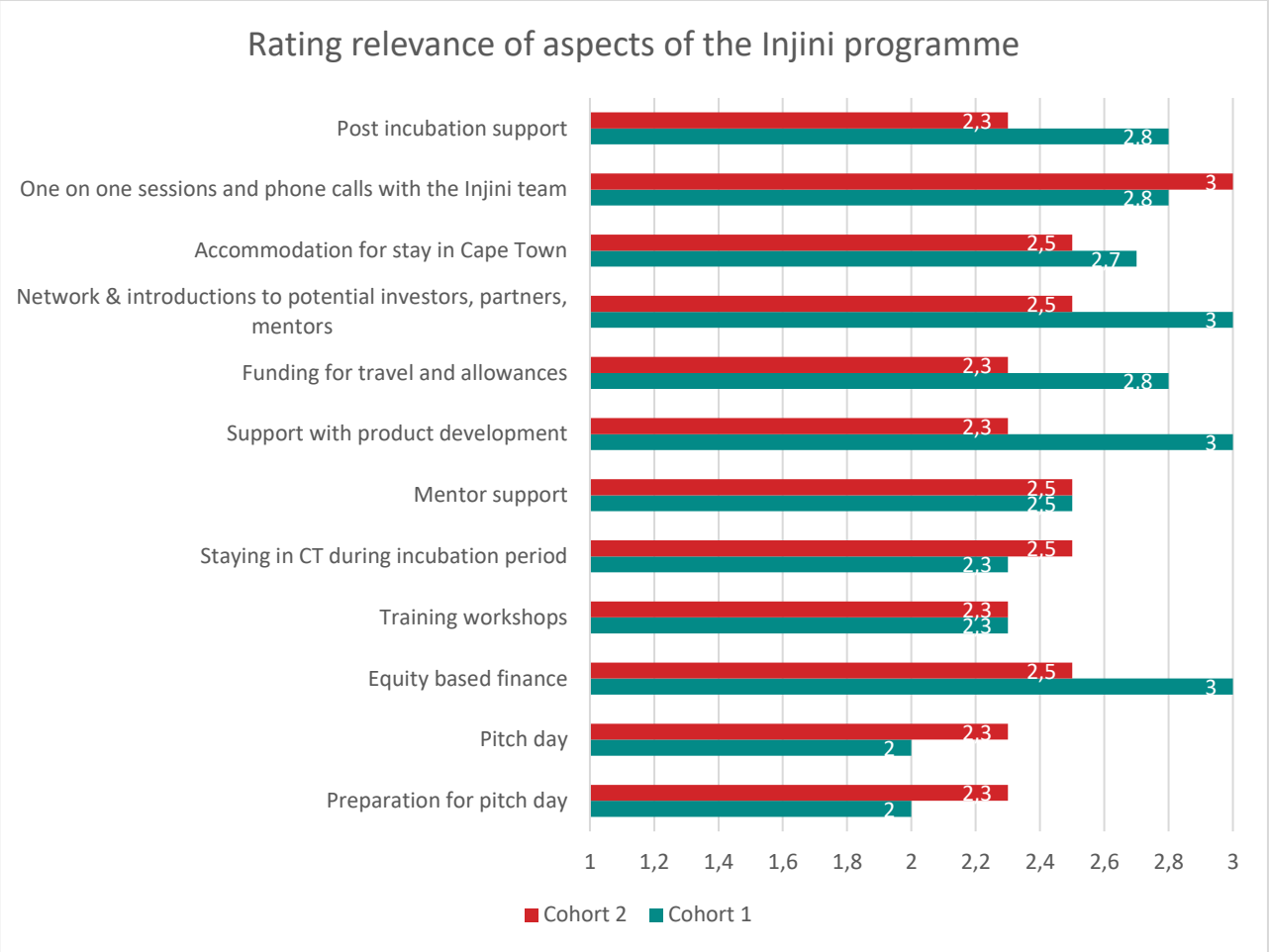
The uniqueness of the Injini programme can also be inferred from the fact that Injini is featured as the only African focused EdTech incubator of the 11 profiled in an *EdTech Review* article on the "11 EdTech incubators focused to change education forever" (Debroy, 2018).

4.1.2.2 Relevance of programme aspects to startups

The evaluation team compiled a list of key aspects of the Injini programme from reviewing programme reports and documents and checked the accuracy of this list with the Injini staff, who then recommended adjustments before approving a list for use for the survey. The Injini staff provided clarity that the sprints were not part of cohort 1, and the Baobab Network Consultancy was part of cohort 1 but was not included in cohort 2, so a not applicable option was provided for these programme aspects to avoid any confusion by the survey respondents. Startups were asked to rate the provided list of aspects of the programme, and if necessary, provide explanations for their ratings.

The overall rating of relevance of the Injini programme in relation to startups' needs was very high, with cohort 1 giving a rating of 3/3 and cohort 2 giving a rating of 2.8/3. Rating of individual programme aspects is discussed below, highlighting that startups consistently rated Injini very highly, for relevance, adequacy and effectiveness for all programme aspects.

The average rating of various components of the Injini incubation programme by the eight surveyed startups was very high, with one-on-one sessions rated a very high 2.8/3 and 3/3 by cohorts 1 and 2 respectively, networking sessions rated and equity-based finance each rated 3/3 by cohort 1 and 2.5/3 by cohort 2. Rating of other aspects were all above 2/3. An overview of ratings of relevance of the Injini programme by cohort are presented in figure 11.



Rating scale: 1 – Not relevant at all; 2 – Relevant; 3 – Extremely relevant

Figure 11: Rating relevance of aspects of the Injini programme

Additional to the aspects mentioned above, four companies in cohort 1 were treated to dedicated one on one sessions for two weeks with professionals from JP Morgan, Accenture, L'Oreal who collaborated as part of the Baobab Network. The relevance of the Baobab Network Consultancy was rated a high of 2.8/3 by all the cohort 1 startups that participated in the survey. Cohort 2 had sprints, and the relevance of preparation for sprints was rated 2.6/3 while sprints themselves were rated 2.9/3 by all cohort 2 survey respondents.

Reasons provided for the high rating of aspects of programme relevance in surveys and interviews are related to the support and funding provided by the Injini team:

> *… the support from Injini in the lead-up to pitching events was incredibly useful in terms of understanding and defining the value proposition of the company, to both investors and clients* (Startup interview).
>
> *Doreen Nabaho was an amazing resource. She provided us with excellent research, consultation and direction"* (Startup survey).
>
> *… the equity funding enabled startups to develop their products and partnerships, hire more staff and dedicate to the development of their businesses on a full-time basis* (Startup survey).

While there was a generally high level of agreement about the relevance of the programme and its aspects, some startups found some of the aspects of the programme irrelevant to them for the following reasons:

- One startup founder indicated that training workshops were irrelevant, as he had joined the programme for the money, because he had been in other entrepreneurial programmes and had received so much training from these and he was not really interested in the training hence he found it irrelevant. He rated the training workshops 1/3.
- Some workshops were considered irrelevant, especially by some cohort 1 startups, who indicated that the different needs of startups were not considered as they had to attend all workshops. They expressed the need to choose the workshops that were relevant to them and then spend more time with that specific facilitator.

It is important to note that Injini addressed this concern in the second cohort, where a needs analysis was conducted at the beginning of the programme, although it is not clear whether startups that did not need a particular workshop were exempt from attending.

A startup questioned the relevance of the format of pitching, commenting:

> *Entrepreneurship in Africa is different to the cliched Silicon-Valley style entrepreneurship, and pitching doesn't quite serve the same purpose. That being said, the support from Injini in the lead-up to pitching events was incredibly useful in terms of understanding and defining the value proposition of the company, to both investors and clients* (Startup survey).

This is a useful point, which suggests that the Injini's pitching exercises are considered western centric, and Injini may want to consider how African business models are unique and how their programme may focus on this.

4.2 Programme effectiveness

This section discusses findings with respect to programme effectiveness. Effectiveness is the extent to which an intervention achieves its intended objectives.

Key Insights

- Injini has had mixed success in building partnerships with stakeholders:
  - Injini had a successful relationship with three funders, the Michael and Susan Dell Foundation, UBSOF and the Western Cape Government who funded cohorts 1 and 2
  - The relationship with mentors and experts has worked well, with both offering free services to support the startups
  - Startups have had varied successes in developing partnerships, with some like Langbot, Mtabe and Syafunda getting lucrative business deals through partnerships
  - Partnerships with service providers have had mixed results. The partnership with the Cape Innovation and Technology Initiative (CiTi) Enterprise Development team started well but became ineffective because of low standards of deliverables. The partnership with Hyperion which was providing tech support worked well with the seconded junior developers, but the training component of this partnership did not work well
  - Injini has also struggled to get local media coverage
- Most startups felt that the duration of the Injini programme was fine
- The duration of the programme affected startups with their home base outside Cape Town as they were unhappy about being away from product development and testing for so long
- Most programme aspects were rated highly by both cohorts, with ratings ranging from 2/3 to 3/3 for adequacy. Only equity based finance received a low rating of 1.7/3 from cohort 2 startups, largely because of the disbursement issues that had been experienced with this cohort.
- Startups were generally positive about effectiveness of most programme aspects, rating them between 2.3/3 and 3/3. Mentor support and equity based finance were rated the most effective by cohort 1 startups, both receiving 3/3, while preparation for pitch day received the highest rating by cohort 2 startups, with a rating of 2.7/3. As with the low rating for adequacy of equity based finance, effectiveness of equity based finance received a low rating of 1.7/3 from cohort 2 startups.
- Difficulties were cited with disbursement of equity-based finance, including depreciation of funding because of a weaker rand, and difficulties transferring funding outside South Africa
- Programme effectiveness was aided by Injini's agility with monitoring, and they changed any aspect that was reported to be not working to improve programme implementation

Three key areas were explored to determine programme effectiveness: partnerships, programme components, and monitoring and evaluation. The interest in partnerships was whether the Injini team was building the right partnerships, identifying and engaging with the appropriate stakeholders to increase the success of the programme, and how well the team was liaising with relevant stakeholders, including policy practitioners.

Effectiveness of programme components was determined by investigating perceptions of effectiveness of these components by startups, including programme duration, adequacy of programme, and overall effectiveness.

With respect to monitoring and evaluation, the evaluation investigated whether there were M&E systems in place for Injini and supported startups, how Injini is planning to share best practice, and whether the programme has laid the groundwork for an impact evaluation in the future and what more is needed to ensure a rigorous impact evaluation.

The overall effectiveness of the programme is judged using the net promoter score.

4.2.1 Effectiveness of partnerships

The main stakeholders in the EdTech ecosystem that Injini specified as important in contributing to the success of the Injini programme during the design of the evaluation and in their reporting are startups, organisations involved in innovative education and incubation, impact investors, banks, telecommunication companies (telcos), the media, government This section discusses Injini's success in developing and nurturing partnerships with funders, experts, service providers, and government, as well as the success of startups in forming partnerships with various stakeholders. While some partnerships were identified upfront and pursued by Injini, other partnerships have grown organically through programme implementation.

The evaluation found that Injini's success in building strong partnerships for the programme, both for Injini operations and for startups was mixed. Injini experienced relative success with partnerships with funders, experts and startups, and experienced some difficulties with service providers, slow traction with national government, and the local traditional media's appetite for covering Injini events was low.

4.2.1.1 Partnerships with funders

For cohort 1 and 2 start-ups, Injini had good funding support from the Michael and Susan Dell Foundation (MSDF), UBS Optimus Foundation, and the Western Cape Government. Conditions of MSDF funding shifted between cohorts 1 and 2, to focus on South African startups, and there were disbursement issues with WCG funding.

4.2.1.2 Partnerships with experts

Injini has had some good success with experts in the field, who have offered their services to be judges, experts at Injini lunch and dinner events, and mentors to startups. The involvement of these experts on the programme is a huge endorsement for Injini as these experts believe in the Injini programme and want to contribute to its success.

4.2.1.3 Partnerships built by startups

As indicated previously, Injini connects startups with potential partners, and cohorts have attained varied levels of success in sealing some lucrative deals for their companies. From the efforts of companies to get partnerships to benefit their business, Injini has learned that some partnerships grow organically and telcos and banks have emerged as key stakeholders because of the following deals that have been concluded with the startups:

- Syafunda made a deal with Old Mutual bank to supply digital resources to 23 schools in rural KwaZulu-Natal (Syafunda progress report, January 2018),
- Mtabe have a partnership with Vodacom and Twilio. Vodacom provides zero rates for sms costs for students with Vodacom sim cards, and Twilio provides discounts in their voice services that they will be launching (Interview with Mtabe).

4.2.1.4 Partnerships with service providers

a. Partnerships for workshop delivery

To augment its lean staff complement, Injini outsourced the organisation and facilitation of workshops to the CiTi Enterprise Development (ED) team. Workshops are an important aspect of the Injini incubation programme and Injini expected high quality services from the service provider given CiTi ED's notable experience in entrepreneur development. However, the partnership with CiTi's ED team did not go as well as anticipated as the team

> *… [had] not met their expectations by a long way. The logic in programme 1 was that CiTi ED would do a lot of startup engagement for Injini, so they organised workshops and one-on-ones, but this did not go well, and ended up being more expensive than when we run it ourselves* (Interview with Injini Staff).

A progress report to UBS sheds light on the services that were required from CiTi ED and the reasons for the breakdown in the relationship. Injini reports that

> *The Entrepreneurial Development team at our partners CiTi were contracted to supply us with General Business Incubation (workshops and one-on-ones), reporting and selection assistance. The reporting assistance was particularly poor, since they lacked the necessary proximity to our activities and the selection assistance was in fact replaced by work by the Injini Team due to slip-ups. In terms of general business incubation, while the workshops were good quality, the topics chosen were not always the most relevant and they were not good value for money compared to Injini organising the workshops ourselves. We have therefore decided to stop using CiTi ED for our second cohort* (Injini, UBS July 2018 progress report).

It is positive that Injini can assess whether partnerships are beneficial and disengage if necessary. The unavailability of CiTi ED to fulfil its responsibilities with workshops, as well as their limited involvement with fundraising and involvement with cohort companies in cohort 1 stretched the Injini staff who had to take on an additional load and had to deliver on their own team's load as well as what had been assigned to CiTi ED.

b. Partnerships for technical support

At the beginning of the cohort 1 programme, tech support was provided by Injini in partnership with Hyperion Development that assisted startups with their tech needs. Each cohort company had either a junior developer seconded to them or tailored training courses for developers in their company, and consultancy support for a senior developer. This was effective and beneficial for startups - Mtabe, Accelerated and Zelda built entirely new apps after joining the Injini programme and M-Shule and Uthini

used senior support to help them build and refine their existing products. Yo'Books used the tech support to transition to build a new platform for providing e-books in partnership with Snapplify and to expand into Uganda (Injini, February 2018 UBS report). However, startups that took the Hyperion training courses were not entirely satisfied and felt Hyperion wasn't well suited to their needs. Injini decided they would not be using Hyperion for the second cohort but would instead consider other suppliers in line with the needs of the cohort (Injini, July 2018 UBS report).

Injini changed the approach to tech support for cohort 2 based on the learnings with Hyperion in cohort 1. Injini consulted cohort 2 startups on their tech requirements before they arrived in Cape Town for the residential programme and invited a few Cape Town tech companies to a meet-up event to discuss the needs of the startups and the possibility of supplying them with advice, consulting services, and other tech support. This would enable the startups to choose a better fit for them for the tech support instead of relying on one supplier like for cohort 1. Slatecube decided to utilise one of the suppliers from the meet, but most of the startups wanted more control and more local options for their tech support, and after checking alignment with funder allocations and requirements, Injini transferred R120 000 tech support funds to each cohort 2 company to spend on tech support as they saw fit (Injini, 28 September 2018, MSDF Quarterly Progress Report).

4.2.1.5 Partnership with government

Traction with government was slow - during the cohort 1 programme Injini had several meetings with the DBE, the Department for Science and Technology, the Technology and Innovation Agency and the Western Cape Government to explore partnerships. Although enthusiasm was shown at these meetings, the follow up did not match the enthusiasm and the returns do not seem to have been commensurate with the investment by Injini in these engagements. As a result, Injini does not consider government as a key stakeholder anymore although engagement with those where benefits have accrued will continue. For example, the Western Cape Government has provided some funding to Injini for cohort 1, and the Western Cape Education Department has enabled access for Uthini to pilot their platform in Cape Town schools, after 25 meetings between Uthini and the WCED (Injini, MSDF Close out Report, 18 January 2019).

4.2.1.6 Partnership with the media

Media play a key role in publicising organisations and events, and Injini reported that they had struggled to get significant traction with traditional media coverage despite contacting local newspapers and broadcasters. The only notable success with local media recorded for cohort 2 implementation is an invitation for an interview at Cape Talk radio. Injini will in future continue to push for better results with local media and complement these efforts with social and global and international press which seems to have given Injini better reception (Injini, February 2018 UBS Progress Report). During the Injini staff interview, a future need was expressed to hire someone who is good with social media and communication to assist both Injini and startups. CiTi ED used to do communications and their lack of involvement has now created a gap in this area. Self-promotion would benefit Injini more than media coverage which shifts so quickly from one event to the next and may be more focused on covering events that attract more readership or viewership than education.

4.2.2 Effectiveness of programme according to startups

Multiple questions were posed to startups determine effectiveness; duration of the programme, adequacy of aspects of the programme, effectiveness of programme aspects, and confidence levels about the programme.

4.2.2.1 Duration of programme

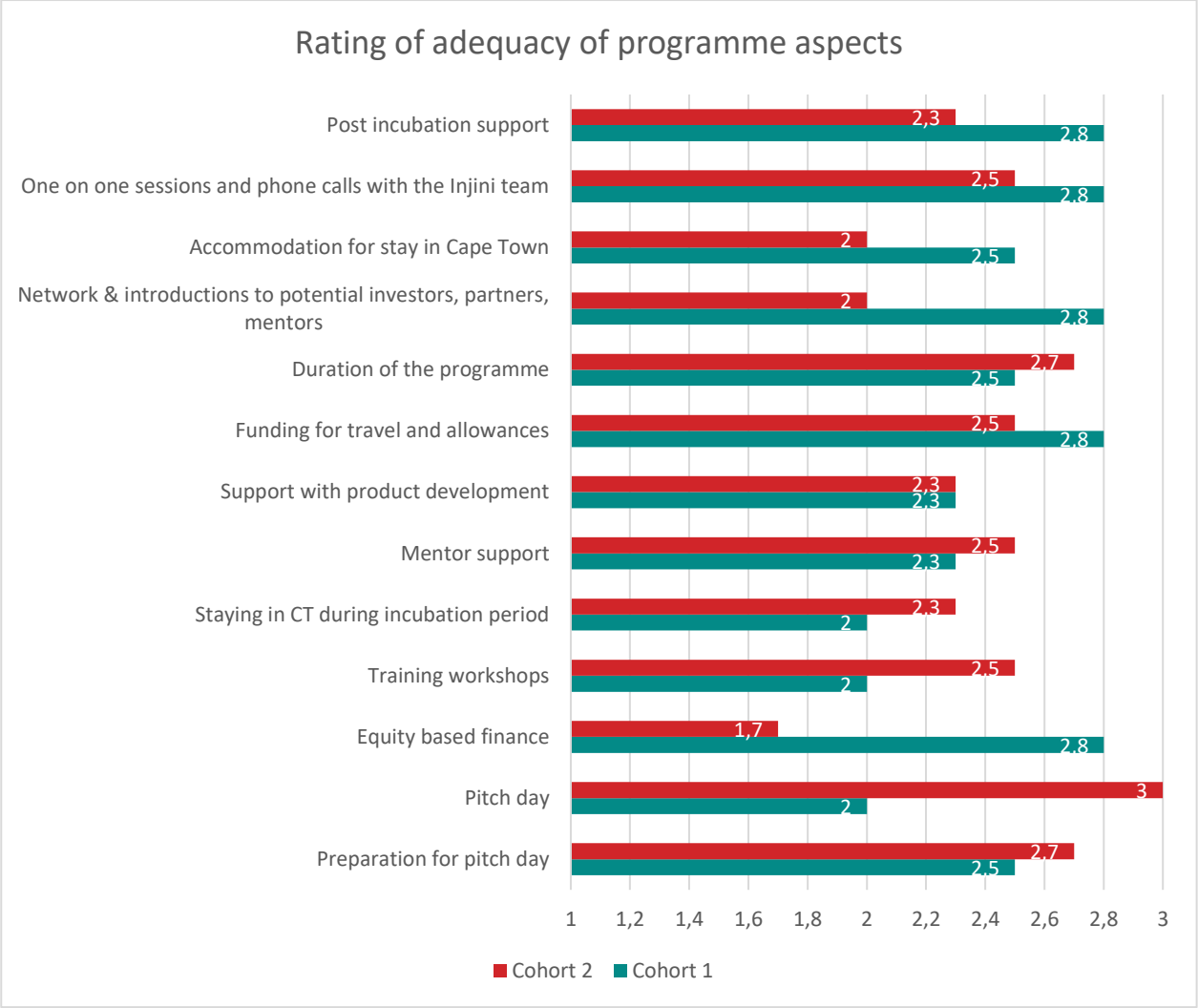
Startups were asked to rate the duration of the programme and indicate whether they thought it was too short, too long or the right length. One of the startup founders who left the programme in the second phase did not provide a rating but indicated that the duration was just about right and post programme support was ideal. Even though the length of the programme varied for the two cohorts (6 months for cohort 1 and 5 months for cohort 2) six of the seven respondents to this question felt that the programme was the right length. Only one respondent, whose home market is outside South Africa, felt that the cohort 1 programme was too long because being in Cape Town removed startups from their base, where they could continue to develop their software and test their products. According to Injini reports to funders, the requirement to stay in Cape Town was a major constraint and at one point four startups in cohort 1 were unable to attend workshops before demo day as they stayed in their home markets to address demands on product development, and chose to come back for demo day. The effects of the length of the programme and the need to stay in Cape Town as well as the nimbleness of the Injini team to accommodate the startups outside South Africa can be summed up by the following submission by a startup:

> *Because we are based in Cape Town, the length of the programme has minimal negative effects on us and simply extended the period of direct support for our business. I believe the programme has been restructured to better suit companies from different regions* (Startup survey).

The Injini team responded quickly to the challenge with programme duration for startups outside Cape Town who struggled to commit to six months, by redesigning the cohort 2 programme and making it five months long. There was a six-week period in Phase 2, where the startups could go to their home markets, with regular catch-up telephonic or face to face meetings with the Injini team during this period (MSDF Injini Quarterly Report, June 2018).

4.2.2.2 Adequacy of programme aspects

Adequacy is about sufficiency, and the question to rate programme aspects intended to gather feedback on whether the level of effort for each programme aspect was enough to make a difference to the startups' development. Overall, the startups rated aspects of the Injini programme as adequate or extremely adequate as reflected in figure 12. A startup particularly singled out product development as extremely adequate by highlighting that the tech person assigned by Injini had helped them to "develop their first mobile app" (Startup interview).



Rating scale: 1 – Not adequate; 2 – Adequate; 3 – Extremely adequate

Figure 12: Rating adequacy of aspects of the Injini programme

Despite the generally high approval ratings for adequacy, some startups found some aspects of the programme inadequate for the following reasons:

- Inadequate preparation - the startup highlighted that the actual preparation at the venue for pitch day for one of the cohorts was regarded as inadequate. Ideally, startups should have gone to the venue before the pitch day to test the microphones and practice at the venue. However, the startup reported that the preparation for the main demo day was very good (Startup interview).
- Inexplicit goals and objectives – it was reported that clear goals and objectives were not set for the pitch days as the startups had different objectives, e.g. some were pitching to funders while others to partners. The audience was diverse and included different stakeholders and it was difficult for the startups to target their pitch. Startups should have received clear guidance about who would be in the audience and how they could create their pitch around the specific audience. It was

suggested that it would have been useful to tailor pitch days according to the audience, e.g. a pitch day for investors and a separate pitch day for partners etc. (Startup survey and interview).

- Support with product development - this was regarded as inadequate by a startup founder, who indicated that there are many aspects to product development and Injini assisted with some of those aspects, but there was a gap. The startup founder indicated that they did not receive in-house support from Injini as Injini did not have a staff member who understood product development (Startup interview).
- Networking – a startup interviewee expressed dissatisfaction with network connections to funders, reporting that expectations to get connected to funders were not met as this startup had not received any introductions to potential funders. The startup acknowledged that the South African funding landscape is difficult, but they were unsure whether the reason they were not connected to funders was because of Injini or the funding environment (Startup interview).

4.2.2.3 Effectiveness of aspects of the programme

Broadly, startups were mostly positive about the effectiveness of aspects of the programme in enabling them to meet their intended objectives to develop their products and launch them and start earning revenue and grow their companies. The rating of effectiveness of various aspects of the programme averaged from 2.3/3 to 3/3 for cohort 1 startups and 1.7/3 to 2.7/3 for cohort 2 startups as highlighted in figure 13.

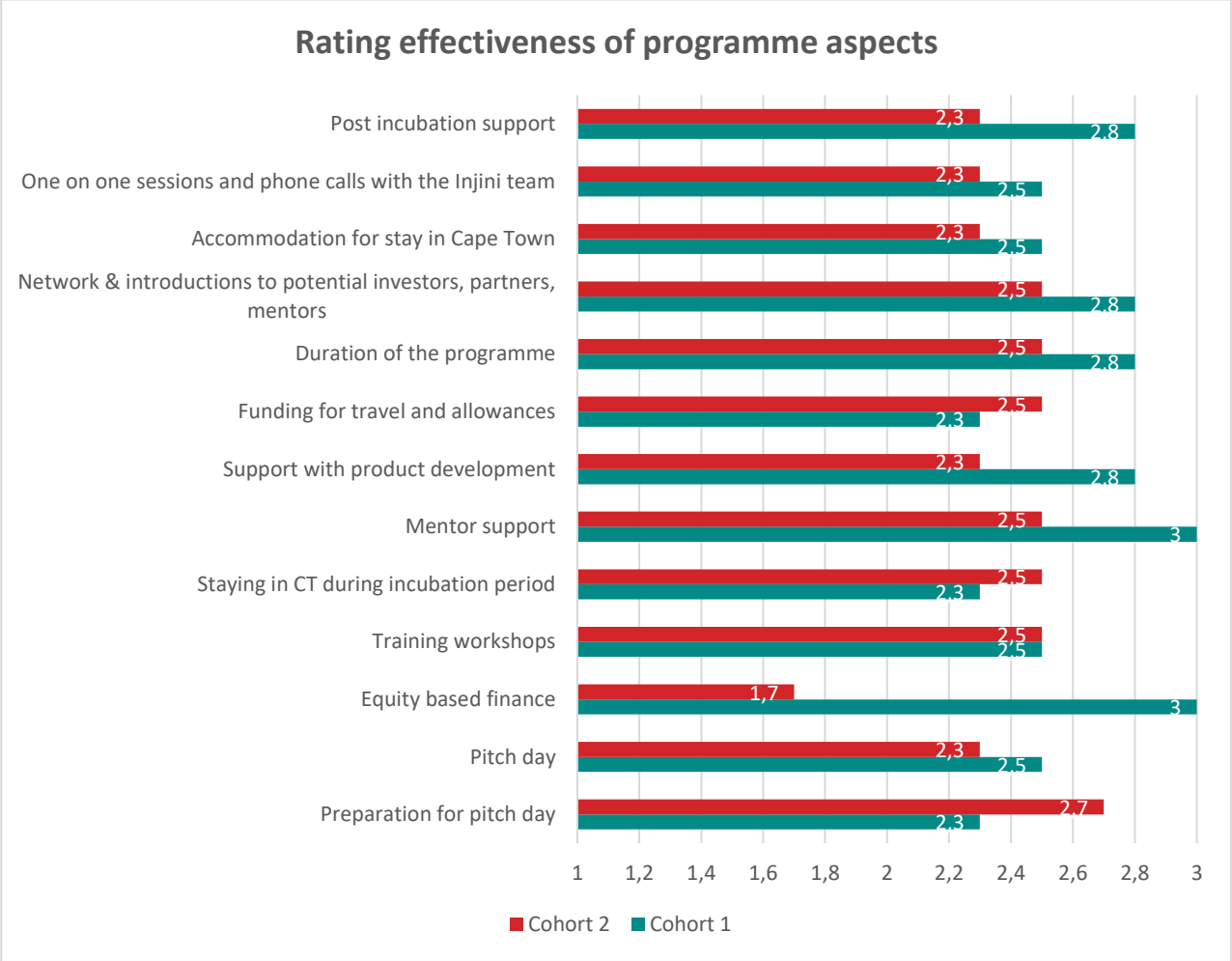
Specific positive comments relating to effectiveness were:

- the training workshops were extremely effective, they assisted startups to focus on business and social impact. The workshops also guided startups when they had little or no experience (Startup survey).
- training sessions contributed towards developing a startup's business and tech side and the structures (Startup interview).
- the training sessions helped with better understanding of our product and how to communicate it (Startup survey).
- the pitch days were highly effective as they resulted in most of the startups' key partnerships and the development of their network (Startup interview).
- mentors assisted a startup, in consultation with Injini, to change their focus from business to consumer (B2C) to business to business (B2B) market as they stated how small the B2C market was for the product (Startup interview).
- a startup mentioned how effective it was for the business to spend a lot of one-on-one time with Jamie, to discuss business ideas. Jamie assisted the startup with information to develop the startup's networks (Startup interview). The effectiveness of one to one support was corroborated by another startup who said:

> *We found that often working with the individuals from Injini, if we sit down with Ruth and have a session with her, or if we sit down with Doreen and have a very focused data session with her, after doing some research, it's a lot more productive than a group discussion where everyone*

just gives a quick overview. I think some quite effective sessions were very focused one-on-one sessions as opposed to broader catch up sessions (Startup interview).

- One startup found the post incubation support to be highly effective as Injini has kept close contact with them, indicating "*Injini has been very supportive to us over the long term and they (Injini) still have regular one-on-one sessions with us*" (Startup interview).



Rating scale: 1 – Not effective; 2 – Effective; 3 – Extremely effective

Figure 13: Rating effectiveness of aspects of the Injini programme

The high rating of workshops and the Injini team during the evaluation is consistent with that of Injini workshop evaluations which took place during the implementation of the incubation programme. Injini reports that

> *Workshops were overall rated on average 4.3/5; with facilitators rated on average 4.4/5 and usefulness of content rated on average 4.4/5.*
>
> *We were pleased to receive very positive feedback again from Cohort 2 on the team's support for them - this was mostly through verbal discussions but we also conducted a survey. The team's*

average support rating rose from 4.3/5 in phase 1 to 4.5/5 at the end of phase 3 (Injini, 18 January 2019, MSDF Quarterly & Close Out report).

There was however some considerable degree of dissatisfaction with the administration of equity funding. It proved very difficult for Injini to move money out of South Africa to startups in other countries because of the Financial Intelligence Centre Act (FICA) regulations. According to Injini, Mtabe received one of their payments late and threatened to end their contract as the lack of funds forced a business shutdown (Exco decks, April 2018). There were also complications with payment to startups with foreign accounts which created tensions between Injini and the startups, and which Injini acknowledges in funding reports. Despite the delays in receiving funding, and other complaints about the depreciation of the value of the funding because of a weakened rand (both which were not the doing of Injini), all startups that received funding were highly appreciative of this funding.

Following on from the effectiveness rating, startups were asked in the survey if they would choose to retake the Injini programme, and all cohort 1 startups said they would, with two out of three cohort 2 startups responding in the affirmative. The startup that dropped out of the programme did not answer this question. Supporting statements from the survey for confirming that they would go through the programme again were:

- *The programme has had the biggest impact on our business of any decision we've made so far.*
- *Market exposure and network access were good.*
- *Injini has been a valuable partner on fund raising and networks locally and internationally.*
- *Injini has been a great network and ecosystem. It also gave us the funding we needed to deliver on our contracts … having the Injini team there as a sounding board was also extremely valuable.*

4.2.3 Monitoring and evaluation

Monitoring and evaluation (M&E) are useful management tools for improving programme effectiveness and impact. Although there was no explicitly defined M&E framework for the Injini programme prior to this evaluation, the Injini team had embarked on an outcome mapping exercise for the programme, defining 17 outcomes comprising seven short term outcomes, six medium term outcomes and five long term outcomes leading to the impact statement of *African EdTech companies improving education outcomes for African learners, supporting richer economies and stronger societies across the continent*. As indicated in the methodology section, this assignment had a separate deliverable to develop an M&E framework for the programme, which has been submitted as a separate deliverable, and which drew from the 17 outcomes.

The absence of an explicit M&E framework was no barrier for effective adaptive management by Injini, for, in practice, Injini continuously improved programme implementation through evaluation of services (particularly post workshop evaluation), reflection on the results, and making immediate changes where necessary. Notable examples of this include:

- The programme duration was changed from 6 months in cohort 1 to 5 months in cohort 2 because of feedback from cohort 1 that it was too long for startups to be away from their home markets.

- For cohort 2 the delivery structure for the programme included a period in phase 2 where startups could go back to their home markets for 5 weeks to do user testing.
- The tech support model changed from cohort 1 to 2 twice, first from use of a single supplier to offer tech support, to invitation of multiple suppliers for cohort 2 startups to choose from, to providing funding for startups to manage tech support individually when the startups indicated that they needed to hire locally based support.

This agility by Injini is commendable, especially for a programme with such short delivery timeframes, where problems need to be addressed quickly to improve effectiveness of delivery.

Injini also empowered the startups to imbibe M&E into their businesses. A theory of change workshop was facilitated by Injini, and cohort 2 startups developed a theory of change (ToC) for their products. The ToCs that were reviewed by the evaluation team were found to be very precise in mapping the pathway to change for the product, and for specifying the metrics for success. However, the ToCs assume that the businesses are stable and sustainable. It would be useful for the startups to map assumptions about product development and business growth into the intervention pathway so that the business development dimension is not lost in the articulation of outcomes and impact for the intervention.

The data provided by Injini to JET for the evaluation shows that each startup for both cohorts wrote one progress report during the incubation programme, with cohort 1 reports having been submitted four months into the programme and cohort 2 reports a month into the programme. Both cohorts' reports are varied and not written on a specific template, but they report on achievements, some very briefly and others very elaborately. Cohort 2 reports are particularly useful in the way they present their progress at the time of writing the reports in comparison to where they were as businesses before joining Injini. This makes it easier to discern the difference Injini is making to the startups, and is a useful structure which can be improved further by specifying aspects that startups should report on, based on the metrics that Injini needs to use to measure its own success in programme delivery as specified in its own ToC, e.g. before Injini and after Injini in relation to:

- Employment
- Partnerships
- Product development
- Users
- Strategy
- Sales
- Revenue etc.

Such categories in a template will streamline reporting and make it easier to capture data that can give Injini an overview of progress by their startups. A mapping of this data according to category can also easily expose gaps or too much focus on specific aspects of the business over others, which will enable Injini to intervene and offer targeted support based on what the data is telling them. It can also show them if some businesses are focusing more on some aspects of business development and ignoring others, and this will inform the appropriate intervention and support. The data capture template that JET developed as part of this evaluation (Appendix C) for mapping progress reported by startups, can be used to design a tool to

collect data from the startups. This data can then be captured and used to review where there are gaps. A support plan for the alumni can then be developed based on areas where Injini perceives the gaps to be for each startup.

What also seems to be a weakness is that reporting was not based on the phases of implementation. It would have been ideal to have progress reports at the end of each phase, and a few months during the post programme support phase for continuous tracking of change. Finally, although it may seem like a minor issue, reports that are not dated are not useful to work with. A dated report quickly gives the necessary context e.g. what was happening at that time in the incubation programme and how long the startup had been in the programme when the report was written. The evaluation team accessed the dates when reports were written through document properties, which shows when documents were created.

4.2.4 Confidence levels about Injini programme

A net promoter score was administered in the survey, asking startups if they would recommend Injini. The question was, "On a scale of 1 to 10, with 1 being not at all likely and 10 being extremely likely" how likely are you to recommend the Injini programme to other startups? The following figure shows the responses:

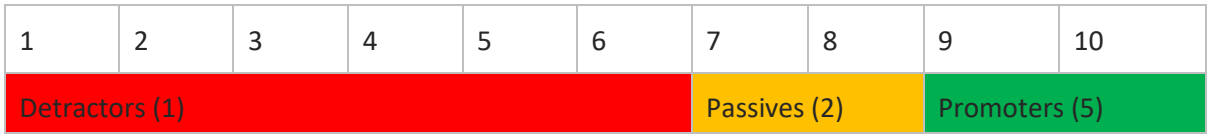


Figure 14: Injini Net promoter score

All eight startups answered this question and the net promoter score for Injini based on this survey and the sample is 50% (63% - 13% = 50%), which is regarded as very good as more than half of the respondents are promoters. The only detractor is the founder of the startup that did not complete the cohort 2 programme, who cited that Injini is not suitable for early stage startups but mature ones. This fairly high level of confidence about Injini is consistent with the high ratings about the relevance, adequacy, and effectiveness of the Injini programme as judged by startups. It also suggests that Injini has the basis for establishing an alumni that can positively promote Injini, which would be valuable given the positioning of the startups in several African countries and Injini's plans for the future to start EdTech hubs across the continent.

4.3 Programme impact

Impact in this evaluation refers to positive and negative changes produced by an intervention, whether these have been produced directly or indirectly. This section discusses findings on the impact of the Injini programme on startups and the education system in Africa.

Key Insights

- The Injini programme was regarded as impactful by startups
- The programme improved startups' understanding of business strategy, improved product development, and increase in revenue
- The companies that seem to be achieving the greatest gains are those in skills especially where business can purchase the product in bulk. Those focusing on K12 are realising that parents are unlikely to pay for extras outside school fees, no matter how affordable a product is

The evaluation determined programme impact by exploring specific areas of impact for startups. These are discussed below:

4.3.1 How the programme has changed EdTech startups

There are very strong indications that the Injini programme expedites the launch of products that come to them when they are already well developed. Cohort 1 provided progress reports to Injini after four months on the programme and cohort 2 provided these reports a month into the programme. The cohort 2 reports that are based on where the startups were before they joined Injini and how they had progressed a month into the Injini programme show that huge strides had been made in realisations about company structure and strategy, there were changes in employment, partnerships, number of users, revenue, and product development. The full scope of these changes is mapped out in Appendix C, and illustrative examples are provided below, a month into the Injini programme for cohort 2:

- eLimu realised there was a need to reduce the size of its workforce and increase productivity by employing staff with more capacity
- Learning Factory had content for 2 subjects, History and Heritage Studies when they joined Injini, and a month later they were producing content for maths and science, with improvements in instructional design
- Slatecube was operating in Nigeria only, and in July 2018 was integrating its product into the South African market
- ScholarX's revenue was $15 000 and had gone up to $20 000 within a month, and its verified users increased from 18 000 to 20 000

Ten months after completing the incubation programme, during the evaluation, cohort 1 startups were recording the following achievements:

- Uthini had revenue of over R1 million, had a core staff complement of four people, and was piloting its platform in the Western Cape in public schools
- Zelda had six permanent staff, had improved product development, and had established partnerships to reach students across South Africa
- Syafunda was reaching 58 000 students and 779 teachers, and had revenue of over R2 million

- Mtabe had 1 200 users, partnerships with Vodacom and Twilio, and an annual revenue of over $100 000

Cohort 2 startups recorded the following achievements four months post the incubation programme:

- Langbot had partnered with Alliance Française Addis Ababa before joining Injini, and after joining Injini had finalised its first contract with them. At the time of the evaluation, Alliance Française were using the Langbot platform to develop content, and a revenue split model of 70:30 had been agreed for any content developed by Alliance Française that would be used by Langbot's other paying customers
- Lightbulb had adopted a B2B model from B2C, and had revenue of over R450 000
- Slatecube's users rose from 8 000 in August 2018 to 9 624 in December 2018 and their revenue was $30 000. Slatecube had also managed to adopt a model where business paid so that students could access skills training for free

These examples show that the Injini programme was able to fast track the progress of startups, positively impacting the commercialisation of ideas and business development and supporting new revenue streams and models of revenue generation. The trend though seems to be that startups that are in the skills and post school stages catering for older students are doing better than those that are focusing on ECD to K12 because parents do not seem to have an appetite to pay for extras after school fees (Injini, January 2019) so a business to consumer model is unlikely not work for this education stage.

Companies were able to employ more people with the funding they received, and yet others were able to evaluate their human capacity and make changes towards efficiency. In their own words, startups acknowledged the impact Injini has had on them and development of various facets of their businesses as follows:

> *We went there with just an idea and a prototype, we left with a business and a product. It was a big change, because we knew what we wanted to create, but did not have the means to do it in terms of how to turn an idea into a product into a business, how to put together the structures, like the team, who do we need. With Injini's help we put together a proposal for Vodacom - that was good, they really helped us. We do not think we would have been able to come up with a better proposal or a better guideline than we got from Injini. We were able to expand due to the Injini programme* (Startup Interview).

> *Joining the programme encouraged and allowed us to work on our business full-time, rather than getting part time jobs or pursuing postgraduate studies. This alone has had a huge impact. However, even if we'd be able to focus on this full time, none of us had prior experience or expertise running such a large project and had very specific engineering knowledge. The programme gave us the knowledge essential to running a company, specifically in tech, specifically in education, and specifically in Africa. I learned more on this programme that I could have imagined possible. It opened a lot of opportunities for us, because people are directly reaching out to us as a result of the Injini programme. It has had the biggest impact on our business of any decision we've made so far* (Startup interview).

> *We pivoted our model from a business to consumer model to focus more on the business to business model. We found that focusing on the product yielded more benefits than focusing on the consumer market services. We also focused more on partnerships and collaboration than just direct sales* (Startup survey).

> *Before the program, we were building with very little consideration for the changing needs of businesses. The Injini program made us always incorporate feedback from all of our customer segments before revamping the product or introducing new solutions* (Startup interview).

Quizzed about what aspects about the programme had resulted in the reported impact, startups pointed to a range of the programme aspects, as illustrated in the following quote:

> *The pitching events and Injini network have led to most of our key partnerships. The funding ensured that we were able to employ staff and grow our product offering as quickly as we have done. The validation and credibility of the programme have supported the development of our own network, including the resulting angel investment. The workshops and mentorship have ensured that we focus on business and social impact and guided us where we had little or no experience* (Startup interview).

Asked to reflect on whether, without Injini, they would have achieved the progress that they had achieved, the verdict was unanimous that companies would probably have, but it would have taken much longer for them. The funding provided by Injini enabled startups to focus on their businesses full time, and the support they received through workshops and startups equipped them with the knowledge and skills for success.

Injini achieved success within the programme with 15 out of 16 of the startups. Based on the first two cohorts, not all startups who come to Injini at pre-product stage would succeed, even though they may be entrepreneurial. The startup which did not succeed withdrew as it was not moving quickly enough beyond the ideation stage, but it persisted and continued to develop its product after leaving Injini, crediting Injini for the assistance with research during the time the startup was on the programme. The research was said to have laid good groundwork for understanding the product better, an endorsement of Injini's focus on the need for evidence-based interventions.

4.3.2 Building strong EdTech ecosystems in the African countries and cities where Injini works

As has been reported earlier, Injini held promotional events in Lagos, Accra, Nairobi, Dar es Salaam, Kampala, Cape Town and Abidjan as part of preparations for cohort 2 applications, and this seemed to have boosted the number of applications received from some of these countries. Injini has plans to increase efforts to strengthen the EdTech ecosystems in the countries it works in, so as to improve the quality of startups applying to Injini. This was indicated in an interview with Injini staff:

> *Starting in 2019, Injini will develop official partnerships with other established tech hubs across Africa with people who work with entrepreneurs, so that top startups in these hubs' network can*

apply to Injini, to improve the quality of the applications and the startups that Injini gets. This will involve Injini running ideation programmes while they are in the countries of interest, to enable Injini to assess the startups before they apply into the programme (Injini staff interview).

These hubs will most likely strengthen the ecosystems in these countries.

4.4 Scalability

Key Insights

- There is a high demand for EdTech incubation in Africa
- Injini's success in supporting 15 startups to completion, some who are on their way to sustainability suggests that there is value in them expanding and supporting more startups towards success

The response to the Injini programme in cohort 2, based on the volume of applications received, suggests the extensive need among entrepreneurs for EdTech incubation. Based on the mapping of current startups in Figure 1, scalability can be determined by geographic area, e.g. expanding further into West Africa and including Ghana and some Francophone countries, or saturating Southern and East Africa etc. Another option for expansion is volume, where Injini can support more startups in countries where they now have startups. Scalability could also be based on targeting specific education stages – based on the current startups, ECD seems to be under served and there is potential to expand at that stage.

The implementation of the incubation programme has exposed one scalability attribute (Nielsen and Lund, 2015) that Injini has capitalised on to achieve the success they have had on a lean staff complement. Injini has leveraged partners working for free, through mentors and experts supporting startups and providing their services. Initially, Injini received operational support from CiTi ED, which augmented Injini's small team, and this seemed useful until it no longer proved to be beneficial. However, this, and the ability to get industry experts to work on the programme for free is an excellent scalability attribute, if the partners consistently produce high quality of service. Injini could continue to pursue this model so that it can continue to achieve more with the lean staff, given funding challenges that seem to have started emerging.

Injini will pursue this scalability attribute in the recruitment of startups by strengthening partnerships with hubs in other African countries who will assist with promotional events for recruitment, which will reduce the input required from Injini for the recruitment process. In the selection process, this will reduce time spent on going through poor applications as the aim would be to get only the best and competitive ideas and products to choose from.

While scalability is desirable given the tangible impacts on startups that are on the Injini programme, the main challenge to scalability is funding. Injini has realised that investors are not as keen on EdTech as they are on FinTech, and it has been a struggle to raise funding for the continuation of the programme. Funding challenges are reported on extensively in Injini reports to funders. Perhaps the funding challenges should encourage Injini to consider scalability through new distribution channels. Injini could pilot delivering their

programme remotely and focusing on providing the business development support and mentoring as well as one on one support digitally. This model however would be challenged by the variations in connectivity among the African countries where Injini works, and by the fact that the equity funding required to maintain cohorts of eight is over R4 million a cohort.

4.5 Sustainability

Key Insights

- 10 months after the end of the cohort one programme, and four months after the end of the programme for the second cohort, startups are doing well, improving their business models and products, and some have started earning revenue while others have increased their revenue
- Startups have found the research and workshops useful, and would like to access them for refreshers when there are knowledge gaps

There is tangible evidence that the benefits accrued from Injini by startups are likely to continue. The first cohort is now almost a year out of the incubation programme and there is evidence that they have continued to strengthen their products and some of them are now earning revenue or have increased the revenue from the baseline when they applied to Injini. The B2B model that most of the startups are prioritising also seems to be a better revenue model, which can be supplemented by B2C and business to government (B2G) models.

Although Injini seems to be discouraged by the response of government to the Injini programme, it has had a policy influence encounter with the WCED. Injini reports to UBS that

> *The biggest policy change that will hopefully be achieved as a result of this project is a change in Western Cape Education Department's approach to education technology including procurement. We were a key stakeholder in shaping their new strategy for education technology, attending discussion sessions are their invitation and commenting on the final report. They are also working on a streamlined procurement process focused on Injini companies, allowing them to get a better chance of bringing innovations into the government sector in the Western Cape. One of the main officials behind it then sat on the Injini cohort 2 selection panel to align our selection with that strategy* (UBS July 2018 report).

Injini's strategy of post incubation support is also useful for business sustainability and is highly valued by the startups. However, as the completing cohorts grow, post programme support could stretch the resources of Injini, and a self-sustaining alumni network may be a useful platform to continue with peer driven post programme support. Lessons on how to set this up and manage this can be learned from other sustained entrepreneurial alumni networks like the Allan Gray Orbis Foundation Fellowship.

5. Conclusions and Recommendations

In less than 12 months since the launch of cohort 1, Injini has amongst other things:

- Processed 975 applications from 36 African countries
- Put together a team that is rated highly by the startups
- Conducted 22 ecosystem building events in eight African cities, attended by more than 2000 people
- Awarded over $500k direct funding to cohort companies
- Put together a programme which is regarded as effective by startups
- Successfully graduated 15 of the 16 startups they have recruited
- Established presence in seven Sub-Saharan countries, through the 15 startups
- Laid a strong foundation for the startup that did not go through with the others, to complete the development of her product
- Created a strong network of business, education, and tech experts and mentors who can assist Injini in the selection of startups and work with startups for free
- Is supporting all 15 startups to grow their business post programme
- Displayed adept adaptive management skills to improve implementation of the programme

The businesses that Injini has supported, amongst other things:

- Opened access to education for vulnerable children and people of low socio-economic status by using delivery platforms that are cheaper and effective at promoting learning
- Created employment for more people in their businesses
- Formed strategic partnerships for business growth
- Started earning revenue from their businesses, or increased their revenue
- Developed a better understanding of business strategy and are employing it to get or increase revenue
- Expanded their businesses beyond their home markets
- Indicated that they have found the Injini programme a high value programme.

Six Injini startups, Langbot, eLimu, M-Shule, ScholarX, Zelda, and Mtabe, were among the 10 African startups competing against 24 other finalists for the Next Billion EdTech Prize in Dubai in March 2019.

Injini's success with the two startup cohorts not only addresses the challenge of poor education outcomes, but also addresses the problem of youth unemployment through establishment of successful startups that can employ other youth while improving the quality of Africa's future entrepreneurs and workforce.

With such a high impact programme, the sustainability of Injini should be a priority for funders and governments. The following recommendations are made to increase the likelihood of Injini's sustainability and for improvements to the programme for future cohorts:

Relevance

The relevance of the Injini programme and the programme aspects is undoubted. What seems to in doubt, given the difficulties with funding, and uptake by government, is the relevance of the Injini programme to some stakeholders. With the achievements listed above, Injini needs to now develop a strong value proposition, drawing on evidence of success with the startups, and evidence on education outcomes emerging from the interventions that it can use to raise funding and support from funders and other stakeholders, as well as procure business for the alumni.

In terms of relevance of aspects of the programme, a useful suggestion has been made to review the possibility of having different pitch days for different stakeholders, that is, pitch day for funders which is separate from pitch day for customers so that the pitches are targeted for specific audiences.

The point was raised about the Injini pitches being Silicon-valley oriented and Injini should take this up by asking about what makes African entrepreneurship unique. There is need to research and reflect on this and incorporate any Afrocentric approaches to entrepreneurship into the Injini programme.

Traditional media has not been effective in promoting Injini, and Injini must do more self-promotion. It would be particularly useful for Injini to have dedicated communication on the achievements with startups to promote the incubator and increase interest from relevant stakeholders for strengthening the incubator.

Effectiveness

Most programme aspects were reported to be effective, though there is room for improvement in a few. To improve the effectiveness of the programme, it is recommended in future:

- Disbursement issues particularly with foreign accounts should be anticipated and communicated timeously with startups before delays happen for contingency plans to be made
- Reporting templates need to be developed to standardise reporting so that usefully comparative data that can be used to support the startups is collected. The before and after Injini reporting should be adopted as it clearly shows the change trajectory and good practice in reporting by startups ought to be encouraged, e.g. including dates on reports
- ToCs for startups should include business growth and development assumptions in the pathway to change for their interventions
- With two cohorts having successfully completed the programme, it would be useful to establish an alumni which provides opportunities for continued networking and support among the startups
- Post-programme support is highly valued by the startups, but suggestions have been made to make it more structured in terms of its regularity and having an agenda to inform what will be discussed in meetings
- There is also need for diversification of programme provision. Mentoring, which was rated as being highly effective, can be provided remotely.

Further, Injini should not give up on building strong relationships with government as doing this is risky. Despite the discouraging engagement so far, it is useful to continue pursuing partnerships with government, especially in South Africa where the government through the Department of Higher Education

and Training budgets for efficiency and success. It is important for Injini to identify the most effective points of entry for government, especially since Injini's goal to improve education outcomes converges so well with that of government. Currently, based on the White Paper for Post School Education and Training (DHET, 2013), and work underway in government to finalise the National Plan for Post School education and training, as well as the fee free policy that will be phased in to first time entry students in universities over the next four years, as well as the new push to expand technical vocational education and training (TVET) provision, the potential entry points into government are:

- The National Student Financial Aid Scheme (NSFAS) – all the funding that is going into fee free education will be wasted if the graduates are not employed. The Slatecube innovation, which is already in South Africa, and which focuses on graduate employability, would be an attractive solution for NSFAS administrators
- The move to expand TVET is taking place in line with calls to expand the provision of occupational programmes, which employers believe prepare students better for the world of work. The challenge is that employers are not too open to providing the workplace experience needed for occupational qualifications because of unfavourable labour law legislation. There is potential in this area then for simulated workplace experience.
- The TVET sector has for years battled with an ineffective and bureaucratic examination system, and a solution to this would be considered because there is a high certification backlog, which is causing unrest in colleges.

These are only a few policy entry points to consider which have potential for the current Injini alumni. There may be need for Injini's research support to go into the policy space to look for possibilities that can be capitalised by the alumni to grow their businesses. The frustration with government engagement is understandable given the size of the Injini team, and perhaps engagement with government can be achieved through partners working for free on behalf of Injini. Government is realising more and more that in order to meet the policy targets of the National Development Plan, there must be partnerships with the private sector.

With two very successful cohorts who have completed the programme, Injini needs to develop a strong value proposition to prove its relevance to government so that government can procure from Injini startups to solve the efficiency and success challenges in the education system, particularly in South Africa.

The risk of not engaging with government and understanding policy trajectories and government projects is that startups may develop interventions that overlap or compete with some government programmes. A case in point is the Zelda career awareness and university applications solution which seems to be like the Department of Higher Education and Training's Central Applications Service and Career Advice Portal. In this regard, Injini should add another criterion to their selection criteria, that there should be evidence of a review of the landscape to see what is planned by government and whether the solution being proposed is not being offered elsewhere in the same country.

Impact

Injini has undoubtedly been impactful and its impact can be captured through better reporting by startups and publicising it by Injini. Video testimonials on the website by startups who have successfully completed the programme will help promote Injini. Further, startups should acknowledge Injini in their engagement with their stakeholders and on their websites to promote the Injini brand. Startups can play a role in the development of future cohorts of startups, given that they have experienced the incubation programme and have learned about what works or not that they can use to advise other upcoming businesses. An impact evaluation should be planned two years from now to determine the long-term impacts of the programme.

Scalability

The demand for EdTech incubation is high, and Injini has many options for expansion, geographically through spreading to regions where Injini is not operating currently, by volume, by increasing the number of startups in countries where there is already presence, and by education stage by considering increasing startups working on stages that have limited coverage e.g. ECD. Injini can continue to use a scalability mechanism of getting stakeholders to do work for free for their expansion, and this includes finding an entry point into government through a stakeholder who is able to negotiate deals with government and has the time to do so given Injini's experience of slow traction with government. Injini can also consider diversifying its delivery channels so that it can reach more startups remotely while still offering the knowledge and skills offered currently through workshops. Injini will need to diversify its sources of funding to achieve scale, and in this regard should research what other viable avenues exist for funding.

Sustainability

Continued post programme support will assist the startups to grow. An alumni will promote communities of practice that can encourage each other to persevere, and with business referrals. Alumni can also mentor new startups based on their business and product knowledge and experience of the Injini programme. Alumni who have found the resources that were shared during the workshops, and the research articles from the Injini team, have suggested that there is value in having access to these resources for a refresher. It would be useful to create a repository of resources, including workshop presentations, that alumni can access.

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7. Appendices

Appendix A: Injini Staff Interview Instrument

PURPOSE OF THE INTERVIEW

JET has been appointed to conduct the external evaluation of the Injini Africa's EdTech Programme. This interview forms an important aspect of the key informant interviews which will be held with Injini staff and key informants from the selected startups. The purpose of the interview is to gather information from Injini staff, about the conceptualisation, design, implementation and perceived effectiveness of the programme. The information gathered from the interview will provide insights that can enhance the theory of change and that will be useful for the development of the monitoring and evaluation (M&E) framework for the programme. The data will also be used for refining the instruments that will be used to collect data from startups. By participating in this interview, you will be contributing to the external evaluation of the Injini EdTech programme external evaluation and assisting in efforts to improve the implementation and effectiveness of the programme.

Confidentiality

The data that is collected remains strictly confidential. No names will be used in reporting evaluation findings. Participation is voluntary. It is important for JET to have an accurate record of our discussion so I would like to take notes and record the discussion. The notes and recording will be stored safely and securely and only members of the evaluation team will have access to them. Because of the small sample size, no names or job designations will be mentioned in the evaluation report – reference will be made only to Injini staff. Is this OK for you?

Thank you for taking part, your involvement is invaluable.

Please sign below, to confirm that you understand the nature and purpose of the evaluation and agree to participate.

Date: _____ Signature: _____

Interviewers:		**Date of interview:**	
Start time of interview:		**End time of interview:**	

SECTION A: Interviewee details and programme responsibilities	
Q1	Please confirm your job title:
Q2	How long have you had this position?
Q3	What are your key responsibilities?
Q4	Who reports to you?
Q5	Who do you report to?
Q6	In your opinion, does Injini have adequate staff capacity to adequately carry out its envisaged functions currently? Please elaborate your response.

SECTION B: Clarifying the need for and relevance of the EdTech programme, its goals and objectives		
Q1	Please describe the EdTech programme. What is the programme about and what are its key components?	
	a.	Broad overview of programme
	b.	Programme components
Q2	What motivated the conceptualisation, design and implementation of this programme?	
Q3	What are the assumptions underpinning the design and implementation of the programme?	
Q4	What is unique about the Injini EdTech programme?	
	a. What differentiates Injini from other incubators?	
Q5	What are the goals (the desired end state) of the EdTech programme?	
Q6	What are the objectives of the programme? (specific measurable results needed to achieve this goal)	
Q7	What are the outcomes of the programme? (short- and medium-term results on beneficiaries – startups and users)	
Q8	What are the indicators for success of the EdTech programme?	
Q9	Other than staff, what resources are channelled into the programme to achieve the intended outcomes?	
Q10	How are the resources utilised by startups?	
Q11	How are the startups selected? What are the selection criteria for startups?	

Q12	Has the support provided evolved from cohort 1 to cohort 2? If so, what are the modifications and why have they been necessary?
	a. What, if at all, further changes to programme support will be made based on what you have learned from cohort 2?
	b. What capacity constraints and challenges have you identified among the startups? How were these constraints identified?
	c. How have these constraints and challenges been addressed?
	d. Can you give examples of improvements in skills from the beginning to the end of the incubation period, in the identified areas where there were challenges?
Q13	What is unique about the startups that are supported by Injini?
	a. How, if at all, do the startups' innovations address the needs of vulnerable children?
	b. How, if at all, do the startups' innovations address the needs of other people of low socio-economic status?
Q14	What are the delivery mechanisms of the startup innovations?
	a. How flexible are these delivery mechanisms?
	b. Are they appropriate to intended beneficiaries? Why or why not?

SECTION C: Implementation of the EdTech programme	
Q1	What support does Injini provide to startups?
	a. How is the support to be provided determined?
	b. What aspects of support given to startups is generic, or provided to all startups?
	c. Which aspects of support provided, if any, are specifically designed or tailored in response to a specific need?
	d. Is the amount of support given by Injini sufficient to help the startups achieve their goals, *and* to achieve the goals of the EdTech programme?
	e. Can you please give examples of ways in which the support offered assisted the startups to achieve their goals
	f. Do you think further assistance is needed by the startups? If so, in what areas?
Q2	What are the stakeholder groupings from which Injini stakeholders are selected?
	a. What are the specific criteria for selection of stakeholders?
	b. How are the specific stakeholders identified?
	c. To what extent are approached stakeholders willing to be part of the ecosystem?
	d. Are there any key stakeholders who are not part of the ecosystem who you feel need to be brought on board?
	e. How does Injini manage its relationship with stakeholders? Is the relation formal/informal?
Q3	How do the stakeholders contribute to the programme?

	a. What have been the successes and challenges with stakeholder involvement?
	b. What happens when stakeholders are not contributing as they should?
	c. Do you consider the contributions of the stakeholders adequate? What else, if anything, would you like them to do further?
Q4	How does Injini monitor implementation of the EdTech programme during the incubation period?
	a. How, if at all, is startup performance monitored after the incubation period? Is this sufficient and effective?
	b. How, if at all, do startups monitor and evaluate their interventions?
Q5	How is the EdTech programme evaluated internally? How often does internal evaluation take place?
Q6	How, if at all, does Injini communicate 'best practice' to startups and stakeholders?
Q7	What data is available on the programme that can be used for longer-term evaluation?
Q8	What are the most notable implementation achievements of the programme?
Q9	What implementation challenges (besides capacity) have you experienced with the startups? How have you addressed these?
Q10	To what extent and how has Injini increased an understanding of the opportunities within EdTech in Africa?
Q11	To what extent and how has Injini increased awareness of challenges likely to be faced by EdTech startups and/or other challenges?

SECTION D: Programme effectiveness	
Q1	To what extent have the innovations selected into the programme improved their intended outcomes?
	a. Have the startups succeeded in commercialising their innovations? i. How was Injini involved in commercialisation? ii. What are the structures, systems, processes and mechanisms through which commercialisation is achieved?
	b. Have the startups succeeded in creating employment within their companies?
	c. Have the startups reached their target market successfully?
Q2	Has the support provided by Injini been able to fast-track the progress of the startups towards solidly establishing themselves as sustainable enterprises?
	a. Can you please give examples where you feel Injini support expedited the progress of startups in establishing themselves?
Q3	What do you think is the status of EdTech ecosystems in the areas where Injini is active?
	a. How do you think the status has changed since Injini started working in these areas?
	b. How has Injini contributed to improving the EdTech ecosystems in these areas?

	c. What further plans are in place in this regard?
Q4	What innovations in terms of revenue streams and models of revenue generation have been developed with Injini support?
	a. What revenue models are in use by startups?
Q5	In what way, if at all, are you on track to developing startups that are sustainable businesses beyond the incubation period?
Q6	What intervention, if any, is required to ensure that startups become sustainable?

SECTION E: Expansion and Sustainability	
Q1	What, if any, are the plans for Injini rollout to more startups, regions or countries?
Q2	What would be the contributing factors to determine expansion?
Q3	What capacity, if any, would have to be built within Injini before any expansion can take place?
Q4	How can the positive outcomes of the programme be maintained and improved upon?

SECTION F: Conclusion
Is there anything else which you think is important that we should know?

Appendix B: Survey for Startups

INTRODUCTION AND PURPOSE OF THE SURVEY

JET has been appointed to conduct the external evaluation of Injini's Programme. This survey forms an important aspect of the evaluation and is an initial method to gather data from selected startups, to be followed by an interview should this be deemed necessary based on the completeness of the data provided in the survey. There will be no follow up interview if comprehensive information is provided in the survey. The purpose of the survey is to gather information from startups, about their organisation and the focus of their intervention, their motivation for joining the incubation programme, the support they received during the incubation programme and post the incubation period, and to get perceptions about the effectiveness of the programme. The information gathered from the survey will provide insights that can be used for refining the Injini programme. By participating in this survey, you will be contributing to the external evaluation of the Injini EdTech programme and assisting in efforts to improve the implementation and effectiveness of the programme for future cohorts. This survey may contain questions that you have been asked before by Injini in their own monitoring of the programme. We ask for your patience in responding to these questions in full as they are now being asked by an external evaluator, as a necessary requirement for a credible external evaluation. Please feel free to add additional rows if needed. The survey will take about an hour to complete.

CONFIDENTIALITY

The data that is collected remains strictly confidential. Unless permission is granted, no company or individuals' names will be used in reporting evaluation findings. Please select one of the options below by marking with an X, to confirm whether you would like to stay anonymous during reporting, or whether you are happy for your company and individual identity to be revealed.

Confidentiality Option	Yes	No
I would like to participate in this evaluation anonymously		
I am happy for my company and my identity to be revealed in the reporting		

If you would like to provide any supporting documents that you think will clarify your responses to this survey, please send them to: monica@jet.org.za and hilde@jet.org.za. These documents will only be viewed by the evaluation team and will be stored securely.

Thank you for taking part, your participation is invaluable.

For any follow ups from the evaluators, please provide the details of the person completing the survey below:

Name:

Position in the company:

Contact details:

The deadline for returning the completed survey is Friday 1 February 2019

Section A: Company Details

1. Company Name	
2. Company CEO	
3. When was the company established?	
4. Company size: Number of employees	
5. Company size: Annual Revenue	
6. Key components of the business e.g. software design, training etc.	
7. Name of intervention being supported by Injini	
8. Description of intervention being supported by Injini- What does the intervention focus on?	
9. Delivery mechanism for intervention and why these are used	
10. When did you start developing the intervention?	Year: Month:
11. Education challenge that the intervention is addressing	
12. Who are the beneficiaries?	
13. What is the intervention's reach?	• Number and name of countries where intervention is utilised: • Number of people utilising the innovation:

(You can include other metrics here)	
14. At what stage of development is your innovation?	
15. Please list those whom you consider as your partners and indicate their roles	

Section B: Relevance of the Injini EdTech Programme

16. Why did you become involved in the Injini EdTech Programme? Evaluate these reasons in order of importance by ticking the appropriate value for as many reasons as you can identify.

Reasons for getting into the Injini EdTech programme	1.Not important	2.Important	3. Very important
Saw advert and decided to get involved			
Wanted to develop a product and did not have money			
Needed financial assistance for product development			
Needed business development support			
Needed assistance with market penetration			
Seemed like a good opportunity			
Other (please explain below)			

Other reasons for joining the incubation programme:

17. What were your expectations when you joined the programme? Please tick as many as applicable.

Expectations	√
To get the equity-based financing	
To get business training	
To get connected to funders	
To network with other startups and get their support	
Other (please specify)	

Other expectations:

18. To what extent where these expectations met? Rate the expectations you have selected using the following scale: 1. Expectations not met; 2. Expectations met; 3. Expectations exceeded. Tick against the appropriate scale.

Expectations	1. Expectations not met √	2. Expectations met √	3.Expectations exceeded √
To get the equity-based financing			
To get business training			
To get connected to funders			
To network with other startups and get their support			
Other (please specify)			

19. What would you say is unique about the Injini EdTech Programme?

20. Please rate the relevance of the Injini programme overall (Relevance refers to appropriateness in relation to your needs), based on the following scale:

Rating scale	√
1. Not relevant	
2. Partially relevant	
3. Extremely relevant	

21. Using the same scale as above: 1. Not relevant at all; 2. Relevant; 3. Extremely relevant, rate the following specific aspects about the Injini programme in terms of their relevance to you.

Aspects of the Injini EdTech programme	1. Not Relevant √	2. Relevant √	3.Extremely relevant √
Preparation for pitch day			
Pitch day			
Equity based finance			
Preparation for sprints (If applicable)			
Sprints (If applicable)			
Baobab Network Consultancy session (If applicable)			
Training workshops			
Staying in CT during incubation period			
Mentor support			
Support with product development			
Funding for travel and allowances			
Network & introductions to potential investors, partners, mentors			
Accommodation for stay in Cape Town			
One on one sessions and phone calls with the Injini team			
Post incubation support			
Other (please specify)			

22. If you have any specific comments about your ratings above, please write them below:

23. What do you feel about the duration of the incubation programme?

Feelings about length of programme	

1. Too short	
2. Too long	
3. Right length	

Any comments on the duration:

24. Please rate the support provided for each of these programme aspects in terms of adequacy:

Aspects of the Injini EdTech programme	**1.Not adequate √**	**2.Adequate √**	**3.Extremely adequate √**
Preparation for pitch day			
Pitch day			
Equity based finance			
Preparation for sprints (If applicable)			
Sprints (If applicable)			
Baobab Network Consultancy session (If applicable)			
Training workshops			
Staying in CT during incubation period			
Mentor support			
Support with product development			
Funding for travel and allowances			
Duration of the programme			
Network & introductions to potential investors, partners, mentors			

Aspects of the Injini EdTech programme	1.Not adequate √	2.Adequate √	3.Extremely adequate √
Accommodation for stay in Cape Town			
One on one sessions and phone calls with the Injini team			
Post incubation support			
Other (please specify)			

Comments on adequacy of support:

25. Please rate the following Injini support in terms of their effectiveness (effectiveness refers to the extent to which the support helped you to achieve intended results for your startup)

Aspects of the Injini EdTech programme	1.Not effective√	2.Effective√	3.Highly effective√
Preparation for pitch day			
Pitch day			
Equity based finance			
Preparation for sprints (If applicable)			
Sprints (If applicable)			
Baobab Network Consultancy session (If applicable)			
Training workshops			
Staying in CT during incubation period			
Mentor support			
Support with product development			
Funding for travel and allowances			
Duration of the programme			

Aspects of the Injini EdTech programme	1.Not effective√	2.Effective√	3.Highly effective√
Network & introductions to potential investors, partners, mentors			
Accommodation for stay in Cape Town			
One on one sessions and phone calls with the Injini team			
Post incubation support			
Other (please specify)			

Comments on effectiveness

26. What has been the impact of the Injini EdTech programme on your business? If possible, reflect on what your situation was before you joined the EdTech programme and elaborate the changes that you feel were resultant from the programme. This can include changes in business approach, company size, capacity, marketing, product visibility, growth in revenue, etc.

27. What particular aspect about the Injini programme has contributed to this impact?

28. Would you have achieved this impact without the Injini programme? Please explain your answer.

29. Where do you see your business in the next year?

30. How do you track changes or progress in your business?

31. What metrics do you track to monitor your business's performance?

32. If you were to go back into the past and you were given a chance to be on the Injini programme would you take up the offer? Please explain your answer.

33. On a scale of 1 to 10, with 1 being not at all likely and 10 being extremely likely how likely are you to recommend the Injini programme to other startups? Please tick.

1	2	3	4	5	6	7	8	9	10

Comments:

Section E: Programme Improvements

34. What aspects, if any, of the Injini EdTech Programme need improvement and how can they be improved?

Aspects of the Injini EdTech programme	Improvement √	How they can be improved
Preparation for pitch day		
Pitch day		
Equity based finance		
Preparation for sprints (If applicable)		
Sprints (If applicable)		
Baobab Network Consultancy session (If applicable)		
Training workshops		
Staying in CT during incubation period		
Mentor support		
Support with product development		
Funding for travel and allowances		
Duration of the programme		
Network & introductions to potential investors, partners, mentors		
Accommodation for stay in Cape Town		
One on one sessions and phone calls with the Injini team		
Post incubation support		
Other (Please specify)		

Section F: Additional Comments

35. If there are any other comments you would like to make about the programme which have not been addressed by the questions, please raise them here.

Please send any supporting documentation that you think may clarify some of your responses or give additional meaningful data to the evaluation team.

Thank you for your participation. Your feedback is highly valuable

Appendix C: Overview of Reported Impact from Reports, Surveys and Interviews

Cohort 1 reports on progress (*the data in italics is interview and survey data 10 months post programme***)**

Startup	Product development	Employment	Partnerships	Revenue	Users	Strategy (sales/marketing)	Sharing practice/Debate
Uthini	Chat bots have improved in performance. Built a better database Tested 3 new features important for language learning *Piloting in the WCED*	Contracted a research psychologist *4*		Providing programme to 600 3rd and 4th year med students at WITS using platform *R1.4 million*	*600*	Refined strategy and target market *A focus on a B2B market rather than B2C*	
M-Shule	Developed 13,200 pieces of content in C4-C8 English & Maths Began designing advanced conceptual knowledge maps Launched pilot with basic SMS learning system Developed and experimented with onboarding, training, and support programs for all learning stakeholders	Grew the content team to 3 full-time members and 3 contractors Grew the tech team to 1 full-time member and 1 contractor			30 schools onboarded 40 school manager meetings/trainings conducted 12 new schools onboarded through referrals	Considering efficient and scalable customer acquisition, retention, and support strategy through blended mode Parents and schools are consistently willing to and do pay for their students to learn and for the data & insights they receive. Started testing revenue model of half price service in August, with transition to full cost in September	

Startup	Product development	Employment	Partnerships	Revenue	Users	Strategy (sales/marketing)	Sharing practice/Debate
Accelerated	Modularising training Developing and testing goal setting framework Developing app for teacher coaches Developed telegram based chatbot	Employed a new coach	Developing partnerships with schools, funding partners and channel partners Signed MoU for impact evaluation	Delivery to 400 teachers in 15 schools		Updating website Preparation for fund raising under way	
Zelda	Currently developing Alpha launch of android app Updated landing site Platformed backed Angular framework designed and prototyped Psychometrics machine learning algorithm researched and designed with help of experts Conducted a pre-product user survey with more than 250 respondents nationwide *We have begun working on a project with a large long-term client.*	Roles of the founders were formalised Appointed a head of Content Generation Took on an intern *6 full-time, 1 part-time, 1 internship*	Currently discussing the establishment of partnerships with Pearson, Siyavula, ProPrep, Nedbank and Feenix *We have established partnerships to reach students across South Africa* *We have received external investment*		*500*	Target market refined Explored various revenue sources Generated a more in depth assessment of the market size and potential for key service Defined preliminary pricing structure	Presented at NY Edtech Week Invited to present at Silicon Cape Tech Talk

Startup	Product development	Employment	Partnerships	Revenue	Users	Strategy (sales/marketing)	Sharing practice/Debate
Syafunda		Hired a business development manager *6*	Awarded Old Mutual SA contract to provide digital learning materials to 23 schools in KZN Partnered with a school in Pretoria West that will serve as a prototype/champion school in GP	*R2 700 000*	*58 000 students and 779 teachers*		
Birdtracks	Plan to develop working prototypes for at least two games between March and August, 2018	About to put together a game-development team	Collaborated with the Massachusetts Department of Early Education and Care to identify the learning and development areas that ascertain future academic success				
Yo'Books			Discussion with biggest publishing house in Uganda	Expanding into Uganda and selling a lot more e-books		Established legal business and small office in Kampala	
Mtabe	Developed a dashboard to track user activities. Tested app with 60 users in Dar es Salaam, Tanzania. Got advice from User experience experts in EdTech		Vodacom Foundation in Tanzania has shown interest in buying Mtabe in bulk Met a director of Ministry of Education who pledged to assist Mtabe with accessing schools				

Cohort 2 progress reports (data in italics is from surveys and interviews four months after the incubation programme**)**

Startup	Product development		Employment		Partnerships	
	Before Injini	1 month into Injini	Before Injini	1 month into Injini	Before Injini	1 month into Injini
Bluebic		These team members will improve digital content strategy and UI/UX and help with building a good help-bot		Hired a UI/UX designer, content strategist and a support team		
eLimu	eLimu also used their own funds to create an android version for consumers.	They would like to run trials with learners in order to evaluate the impact on their real clients Have applied for projects to create literacy apps in refugee camps Have learned how to use agile systems, user personas and UX principles a lot better		Realised that they need to reduce the size of workforce yet increase productivity by employing staff "with more capacity"		Began developing partnerships in South Africa, and met with literacy organizations like FunDza and potential partners working in literacy like WordWorks, Nalibali and Zander; school chains like Curro, Future Nation and Spark Schools
Langbot	MVP won the Facebook messenger bot challenge in 2017 Finalist in the Seedstars World Competition in 2018 and was named "Most Promising Start-up in Addis Ababa" Launched Belta in December, 2017	Worked on a product for schools			Partnered with Alliance Française in Addis Ababa, which is the third biggest French school in Africa.	Finalised first contract with Alliance Française Addis Ababa, who is coming to Cape Town to help build a French-teaching Chatbot. Prioritised partner strategies. Made valuable connections that will be developed.
Learning factory	Had a prototypes Studybox kit and content for 2 subjects – History and Heritage Studies.	Producing content for Maths and Science, which will be used to	1 full-time employee	3 Fulltime employees		Entered an arrangement with the University of Virginia

Startup	Product development		Employment		Partnerships	
	Before Injini	1 month into Injini	Before Injini	1 month into Injini	Before Injini	1 month into Injini
		test scalability of company Improvement in instructional design Improvement of design of multi-format content Content is more interactive A digital literacy training manual is being prepared for teachers for piloting in October 2018 YouTube analytics are being used to improve design of educational videos.	Worked with Teachers and other professionals on a project basis	Enlisted 3 additional teachers for content development Engineers have been contracted to develop the prototypes to market-ready products		
Lightbulb		Now understand how to create better experience for the user – Updates recommended from the product and UI/UX positions		*4*		Started to forge partnerships with companies to gain market access
Scholarx	No scholarship management system Selected for the Wise accelerator award in Qatar in 2018-19 (only African Startup that was selected)	Scholarship management system put online Identity verification established (Smile Identity API integration)			190 sponsors (70% diaspora) Partnered with AB review to provide access to scholarship listings and education	220 sponsors (75% diaspora). Working on key partnerships with Tenco Mobile, Sterling bank and glo Mobile.

Startup	Product development		Employment		Partnerships	
	Before Injini	1 month into Injini	Before Injini	1 month into Injini	Before Injini	1 month into Injini
		Clear understanding of Product Development Phases and team management UX/UI redesign of ScholarX Platform (web and mobile)			crowdfunding services for students in Accra	
Slatecube	Redesigned tools to ensure usability	80% conversion into internships/ full-time jobs 25% hiring increase from businesses.		*11*	10 SAP student communities across 10 tertiary institutions in Nigeria	*Recruited 16 student ambassadors to the Slatecube Ambassador programme who signed up 1 600 new users from October 2018 to December 2018* *Integrated product into South African market in July 2018* - *Skilling and upskilling candidate attorneys for Weber Wentzel for Johannesburg and Cape Town offices starting in February 2019* - *Pilot project with Afrika Tikkun to upskill and place 600 beneficiaries in entry level positions in South Africa* - *Formed partnership with*

Startup	Product development		Employment		Partnerships	
	Before Injini	1 month into Injini	Before Injini	1 month into Injini	Before Injini	1 month into Injini
						Youth Employment Services to train unemployed youths using Slatecube solution - *Working with the dean of Henley Business School in Johannesburg exploring possibility of using Slatecube programmes to upskill MBA candidates*

Startup	Revenue		Users		Strategy (sales/marketing)	
	Before Injini	1 month into Injini	Before Injini	1 month into Injini	Before Injini	1 month into Injini
Bluebic		39 Schools currently pay for BlueBic 19 Schools have applied for license to use BlueBic in the new term		5 schools are active on Injini for free		Refined strategy and better structured processes and plans.
eLimu	Released first consumer version of app in the google play store in July 90%+ of revenue comes from institutional sector. Contracted to develop the app for four languages for grades 1&2 in Kenya and Uganda by Aga Khan Foundation for 250 000 USD		Literacy apps (in 4 languages) are in 70 schools in Kenya and Uganda. The Somali version is used by 1 200 refugee youths within 6 community centres in Dadaab		eLimu used part of the grant to develop a content management system to lower the development costs of future apps in different languages Realised that more effort needs to be put into sales and forming partnerships with the NGO sector and with	

Startup	Revenue		Users		Strategy (sales/marketing)	
	Before Injini	1 month into Injini	Before Injini	1 month into Injini	Before Injini	1 month into Injini
					different channels and, therefore, have tapped into Injini's network	
Langbot		*Allais Francaise developing content and if content sold to Langbot users then 70% for Allais and 30% for Langbot*		*240 000*		Strengthened framework. Better overview of the operation of Edtech businesses. Gained knowledge in key areas. i.e.: sales and impact strategies *Pivoted into B2B model so schools can pay*
Learning factory	Sold educational films on DVD for use by teachers. 12 Units sold to Mt Pleasant, Harare.					YouTube subscriber count has increased by 14
Lightbulb		*R450 000*		*800*	*Business model was business to customers* *Sales directly to customers*	Re-aligned business model approach: Now business to business instead of a more client-based thing Restructured key marketing and sales strategies
Scholarx	Made 15 000 USD in revenue	20 000 USD in revenue	18 000 verified students	20 000 Verified students	Managed BTA education scholarship award (1st edition) Organised Education Scholarship Fair with Kedge Consulting Limitedfor Graduate Students.	Managed BTA education Scholarship Award (2nd Edition) Organised Zayed Sustainability prize information session (worth 100 000 USD) for

Startup	Revenue		Users		Strategy (sales/marketing)	
	Before Injini	1 month into Injini	Before Injini	1 month into Injini	Before Injini	1 month into Injini
						50 Schools in impoverished areas Managed Seyi Shay Education Scholarship award Organised School Technology day for 200 + schools in impoverished areas to raise funds for scholarships. Renewed focus on Scholarship Financiers
Slatecube	352% monthly average increase in paying B to C users.	*$30 000 gross revenue for 2018* *33 corporate accounts as of December 2018*	7 274 registered B to C users	Number of Statecube users has increased to 8 000 *9 624 users as of December 2018*		Refined business model Streamline operations *Buying financial accounting courses for revenue split of 70:30 for every student hired from doing that course*