

IN FOCUS...EDTECH INVESTMENT IN THE TIME OF COVID-19

The last decade has seen huge investment increases for education technology, which has promised much but not always delivered. Nathan Martin, Editor-in-Chief for EdTech Publik, takes us briefly over these developments in the EdTech landscape and what needs to change to improve the effects for teachers and learners.

WHY IT MATTERS

Responding to the rise in demand for EdTech resources and support, investors like Owl Ventures have rolled out substantial new funds, with US \$5.6b in new funding entering the market as of the end of October and, [going to 479 EdTech companies](#). The numbers are gargantuan and, largely, not based in the US or UK. India's Byju raised an additional US \$622m while two Chinese companies, Yuanfudao and Zuoyebang, brought in US \$1b & US \$750m respectively.

Making sense of this global market requires the intelligence of a worldwide community. That's why we launched the beta of EdTech Publik, a free and open database for EdTech, covering the last 10+ years of the industry, with over 30,000 nodes, 7,000 organisations and 5,000 transactions. The idea is to join up fit-for-purpose tools with the insights of the EdTech community.

WHAT'S HAPPENING IN EDTECH?

At EdTech Publik, we watch the market and research, [summarising the latest movers and shakers](#) in digest form. As we approach our 50th digest, here's what we see:

- **Show me the online tutoring:** Solutions promising to mitigate learning loss, support students stuck at home, and help them advance in their career have seen a massive surge of interest. A slew of [tutoring providers](#) such as Classplus, Unacademy and [GoPeer](#) are competing to attract students and vetted tutors. The surge in interest has even pushed two teenage brothers in [McClean, Virginia to launch a free offering, InTutorly](#). The interest is real, the question is how big this bubble can grow.
- **The rise of the pods and virtual learning communities:** Students are looking for options when it comes to in-person learning experiences, whether that's the rise of learning pods or virtual high schools, such as [Sora](#).
- **The holy grail of Virtual Professional Development:** Upskilling and supporting instructors is critical to this process of change and virtual paid-for PD is top at the agenda of governments across the world. [ISTE successfully experimented](#) with online learning and certification this summer. Groups like [Better Lesson](#) and [Chalk-Lit](#) are worth watching.

- **Employability, direct-to-consumer courses and financing:** Whether it's groups like Whitehat Jr, Lambda School or [Newton School](#), there is a rise in courses tailored to helping students to earn key employment skills but also offering financial support and income-based repayment to do so.

HAS EDTECH LIVED UP TO ITS PROMISES?

The period covered by the EdTech Publik database covers a major shift of capital and attention to education technology. In 2010, Rupert Murdoch spent [\\$300m on Wireless Generation](#); 2012 heralded the [rise of the MOOCs](#); and we saw an endless stream of products dedicated to adaptive learning and AI in education (see [Knewton and 2015's Tutor in the Sky](#)).

Headlines were dominated by blockchain, augmented reality and coding bootcamps. EdTech promised to transform, disrupt, upend, accelerate and revolutionise learning. While there have been gains, improved technology, a focus on efficacy, democratised content and new support systems, EdTech results in the classroom have rarely lived up to the promises on the tin.

LOOKING TO THE FUTURE

For the next ten years to deliver on the promise of EdTech, and avoid becoming a flat circle, it will require governments to act progressively:

- Purchasing new products as well as addressing underlying systemic issues such as procurement, broadband support, nutrition and mental health of students and teachers.
- Creating products that are informed by quality research, building on the work of groups like the Education Endowment Foundation.
- Retaining central implementation but tailoring products to local contexts.
- Measuring investment success using different metrics, rather than looking to other parts of their portfolio.
- Focusing on providing the right types of inputs to measure impact.

KEY TAKEAWAY

It will take the entire market and its beneficiaries – including schools and governments – working together, sharing insights and working to create solutions that won't just sell, but actively solve problems and improve the lives and learning attainment of students.

IN FOCUS...EDTECH IMPACT

With so many products now available, the choice of which to go for can be overwhelming for school leaders: where do we start? How can we shortcut to the best ones?

[Michael Forshaw](#) talks us through why impact matters and what we can do to measure it to build on EdTech's success.

WHY IT MATTERS

COVID-19 has shown the industry – educators, investors, learners, parents, governments, resource providers – the benefits of using technology, and highlighted many opportunities. For schools, it's no longer just putting out fires, surviving and getting through it, grabbing anything they can to support remote learning. It's now about planning ahead and building a digital strategy that will transform their school from where they are now to the most impactful blend of synchronous and asynchronous learning.

Q&A: MICHAEL FORSHAW, FOUNDER OF EDTECH IMPACT AND [INNOVATE MY SCHOOL](#)

Michael has been in education for about 15 years and founded [Innovate My School](#) over ten years ago. It has grown to be a large content platform based in the UK but with a global audience where we crowdsource school stories from educators on how they're innovating in their school.

WHAT'S IT ALL ABOUT?

[Innovate My School](#) now has over 2,500 articles, 1,300 contributors and around 50,000 subscribers across various channels. They also pioneered the concept of 'speed dating' with school leaders and education companies. There has been much involvement from tech companies and they've done over 250 'speed dates' – with online versions about to start.

On the back of ten years of introducing companies to schools, Michael has learnt a lot about how to sell to schools, what works and what doesn't. He wanted to help companies build up trust independently and we felt there was a real gap to provide an independent layer between the schools and the suppliers, so [EdTech Impact](#) was created as an independent review platform. They had great growth since COVID-19 going from 200 to over 600 companies, including some of the biggest names globally and lots of start-ups and SMEs in between.

What has been the greatest influence that EdTech Impact has had in terms of schools using technology?

Before starting [EdTech Impact](#) we surveyed [Innovate My School](#) leaders and asked them what influences them making a decision. Seeing a product used, not

just by another school but a school like theirs, was key. The real driver is providing evidence to help schools with discovery and make informed decisions about what product might be right for them.

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What's your vision for the future of [Innovate My School](#) and [EdTech Impact](#)?

We want to see every company have complete transparency on their product and understand what outcomes it has set out to achieve so that we can help schools make better decisions. The two platforms work in tandem; [Innovate My School](#) shares article-based content while [EdTech Impact](#) looks at the data.

What has been the most positive thing to come out of the lockdown?

On the school side there's certainly more confidence about technology and there's new competence around using it to assist with teaching and learning. I think people are going to move to becoming more aspirational with their usage of [EdTech](#), which will hopefully lead to greater impact in schools through greater adoption and embedding of [EdTech](#). No one knows when this is going to go away, so schools have got to plan now.

Where do you see opportunities for the future?

COVID-19 has certainly highlighted on the industry side where the opportunities are. Some products have done really well because they were able to support blended learning immediately. But it's also identified some gaps where there aren't as many products available.

Mental health and wellbeing are set to become more apparent and more critical, as well as adaptive learning tools to enable personalised learning and create personalised pathways using AI. Anything that supports digital skills and supports careers beyond that will continue to grow.

'IN A WORLD WHERE WE NEED TO TRY AND DEMOCRATISE EDUCATION, VIRTUAL TUTORING COULD REALLY WORK AT SCALE.'

You can't beat face-to-face learning, however, in a world where we need to try and democratise education, virtual tutoring could really work at scale. Deploying a virtual tutor is approximately 100th of the cost of an actual tutor and so I think that's going to become more embedded in our lives.

What about parents?

Parents are certainly more aware now of resources so we've evolved the platform to take parent reviews as well. However, one of the biggest issues with all of this is the digital divide: Can it be used offline? Can it be used on a mobile? Does it require parental supervision? Is there a tutorial for parents? These are all considerations that EdTech companies have got to take on board.

What worked for the industry during school closures?

Companies have employed lots of different strategies to try and succeed in this period: free content, online offerings, new services. We tried to help schools navigate the deluge of offers coming out of the industry by curating it all into one place.

With EdTech Impact, we looked at the top ten companies throughout lockdown. There were no start-ups – all were minimum four years old and all covered the core subjects. They all provided personalised learning to some degree and had super-slick onboarding processes. They really care about customers and they've invested into them in a big way. If there's anything to do, it's learn from that.

How do you see the relationship that schools have with their tech progressing?

Confidence is growing and schools are more open-minded to trying new things. Equally, they're extremely busy trying to manage COVID-19 restrictions, which doesn't create much opportunity for new companies to try and get in front of their noses.

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To some degree, support and patience are required. Half the EdTech sector is start-up, so unless you're

one of those that's scaling-up massively, then it's trying to keep hold of your existing customers and make sure that they're supported. As schools start to manage blended learning, then I think they will create space for how technology can be adopted again and try new things as they learn from each other.

EdTech founders are used to playing the long game – even if you aren't scaling-up right now you're in the right place. Double-down on your customers and your evidence and really get to grips with it. Build more evidence about what's working and understand why it works and why you've got this chance now.

What can the industry do to have a transformational impact on teaching and learning?

'AS EDTECH ADOPTION INCREASES, WE'VE GOT TO BE BETTER AT MEASURING IT.'

With EdTech growing, the big question that needs answering is: how can we collect not just qualitative feedback or perceptions on impact, but quantitative data as well? There are a lot of considerations – what type of assessment and on what scale? What baseline to use? What pre- and post-data? – but it's something schools need to carve out the capacity for. This leads back to suppliers knowing as much as possible about why their product works. Then the government should do everything it can to support the upskilling of teachers in measuring the impact of EdTech in their schools.

KEY TAKEAWAY

As EdTech adoption increases, we've got to be better at measuring it, otherwise we won't know if it's having the right impacts, or simply wasting money. That's why EdTech Impact was built: to help everyone on that journey.

IN FOCUS...EDTECH INTERVENTIONS

For EdTech this has been a year of opportunity laced with challenge. The same drivers which pushed online learning to the fore as schooling retreated to living rooms and kitchen tables brought urgent questions for providers. The increased demand didn't just stretch infrastructure and business capacity: that demand was being fed by users with a greater diversity of needs, experience and hardware than ever before.

John Deans looks at some recently used systemic interventions in the wake of Covid-19.

WHY IT MATTERS

The pandemic has caused a [range of responses](#) from educators and from EdTech firms. At first, there was the scramble to provide for learners as the rug was pulled from beneath their feet. Now, teachers are thinking hard about what they need to do to teach students effectively despite the disruption, and are taking up new attitudes to their use of technology in the longer term.

EdTech providers, then, were necessarily caught up in that early scramble: how could their infrastructure and back-office scale to cope, and what could they and should they charge for on the one hand, or on the other make available for free. For some there was – and is – the opportunity to make transformative changes through their reach into schools and homes.

GOVERNMENT INTERVENTIONS

The international health emergency has pushed governments around the world into greater state intervention than many are used to, including in EdTech. In the UK, Government backing of the Oak National Academy was a welcome intervention for schools and parents, but poses questions for print and digital publishers in the private sector. In countries where physical and digital infrastructure is less developed, innovation uses the infrastructure that does exist. For example in [Nepal](#), a five-tiered response provided resources on the internet, as physical digital media for students with computers but no reliable Internet, television for those without computers, FM Radio for those without television, and delivery of paper materials for those without radio.

While these government are understandable responses to an otherwise overwhelming crisis, those of us expert in creating research-based educational materials know where the inadequacies are with expositional materials like these. The question is, where are the examples of EdTech equipping teachers to reach their young people – including those at more risk of being disadvantaged through circumstance or prior level – and make sure their learning experience is as effective as possible.

EDTECH AND INCLUSIVITY

Using available technology, the Kenyan MoE has been using WhatsApp to cascade information down, informing learners and teachers about educational opportunities;

but also to disseminate activities, lesson notes and methodology, and teacher mentoring. Queries (and complaints) can be communicated up from teachers and learners' families – this is a low-tech, low-infrastructure approach which uses technology not only to provide learning resources, but to [empower learning as a person-to-person activity](#).

Elsewhere, the international multi-agency [mEducation Alliance](#) is running [a competition](#) to build engaging maths education games which rely on minimal technological resources in the hands of learners; but which might rely on highly innovative technology on the server side. These approaches – which provide as rich a learning experience as possible even for those learners who don't have the advantages at home of some of their peers – innovate in the direction of inclusivity, much threatened by the disruption of the existing educational environment.

KEY TAKEAWAY

Using digital technologies to empower the human aspect of teaching and learning, and to make sure that it's accessible to students almost however limited their own technological infrastructure, is the way to an inclusive and democratised educational landscape. This period of disruption opens an opportunity for substantial progress in this direction.

EdTech Publik and Oriel Square are collaborating to bring the global education technology community closer together. We know that the fast-paced world of EdTech can be difficult to navigate and we want to help. In our EdTech Insights series, we will bring you articles and interviews from the front-lines of funders, entrepreneurs and leaders working to improve education. We'll be talking all things EdTech, from investment and transaction trends to what works in content, policy and innovation, through to who's who.

Next issue: we'll bring you a deep dive into trends in EdTech investment around the world, and hear from funding-recipients about their experience of the funding process and how they've capitalised on strong partnerships. Sign-up [here!](#)



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