The Present we need to Embrace

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EduQuest Hub
Definition of Educational Technology (AECT, 1996)

It is a complex, integrated process involving people, procedures, ideas, devices, and organization, for analyzing problems and devising, implementing, evaluating, and managing solutions to those problems, involved in all aspects of human learning.

The solutions to problems take the form of all the *learning resources* which are identified as: *messages, people, materials, devices, techniques, and settings.*
Educational Technology or Technology in education?

Not the same!

Technology in education is the application of technology to any of those processes involved in operating the institutions which house the educational enterprise. It includes the application of technology to food, health, finance, scheduling, grade reporting, and other processes which support education within institutions.
Educational technology is the theory and practice of design, development, utilization, management, and evaluation of processes and resources for learning.

It is a discipline devoted to techniques or ways to make learning more efficient based on theory but theory in its broadest sense, not just scientific theory.
EdTech broadly could be categorized into 4 segments

**ONLINE EDUCATION**
- Primary and Secondary Supplement Education
- Test Preparation
- Higher Education
- Reskilling and Online Certification
- Language and Casual Learning

**SMART CLASSES**
- Learning Management System
- Enterprise Resource Planning
- Content Management and Delivery Systems
- Innovative Classrooms
- HD Animated Videos
- Story Based Learning

**ASSESSMENT**
- Remote Proctoring
- Testing Platforms

**OFFLINE EDUCATION**
- Tablets
- SD Cards

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*EdTech is defined as the emerging sector at the intersection of Technology and Education. Technology enabled solutions and services that redefine how traditional education is imparted to students at all levels could largely be categorized as EdTech.*

Source: KPMG, NASSCOM Analysis
“Education is the passport to the future, for tomorrow belongs to those who prepare for it today”

Malcolm X, Famous American Activist
Understand Global EdTech scenario

Analyze growth of EdTech sector by investments and acquisitions

Understand the business dynamics of EdTech Highlight support and obstacles to EdTech growth

EduQuest Hub - Overview
EdTech Landscape
Growth in Asia Pacific middle class a key driver for EdTech globally

- **Global Spending on EdTech by 2020**: USD 250 Billion
- **Invested Every Year in EdTech**: USD 4 Billion
- **Attracting Half of Global Startup EdTech Investment**: China
- **Major Hubs of EdTech Global Ecosystem**: USA, China, India

**Global EdTech Drivers**
- **Population**: Middle Class population in Asian countries to reach 3 Billion
- **Shortage of University seats**: 98 million qualified student globally deprived of higher education
- **One device per student**: Advanced countries are moving towards one device per student

**Prominent Players in Global EdTech sector**

Source: MarketWatch, Edtechdigest, Medium, Global Startup Ecosystem Report
Student assessment and engagement in the learning process will be the next BIG things in EdTech. Technology will play a key role in this...

- **Personalized Robots**: Robot that will adopt and respond according to the child needs.
- **AR/VR**: To increase student engagement and quality of communication.
- **Biometric**: To understand the engagement level of students.
- **Big Data**: Identify risk of failure; giving students instant feedback; and benchmarking performance.
- **Cloud Computing**: Textbook concept will change and knowledge will be on cloud.
- **3D Printing**: Printing 3D models for any structure.

Source: KPMG, NASSCOM Analysis
20+ Active Investors in the Edtech space with ~600 Mn USD investment in last 5 years

### Active Investors in Seed Stage (last 5 years)

<table>
<thead>
<tr>
<th>Investor</th>
<th>Firm</th>
</tr>
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<tbody>
<tr>
<td>Zone4 Capital</td>
<td>OnlineTyari, AlmaConnect, Campus Diaries</td>
</tr>
<tr>
<td>Aarin Capital</td>
<td>Tabtor, KleverKid, Campus Diaries</td>
</tr>
<tr>
<td>Blume Ventures</td>
<td>Unacademy, flipClass, Mockbank</td>
</tr>
<tr>
<td>Unitus Seed Fund</td>
<td>Cuemath, Curiositi, LabInApp</td>
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### Active Investors in Early Stage (last 5 years)

<table>
<thead>
<tr>
<th>Investor</th>
<th>Firm</th>
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<tbody>
<tr>
<td>Accel Partners</td>
<td>Vedantu, EduPristine</td>
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<tr>
<td>Kaizen Private</td>
<td>Impartus, EduPristine</td>
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</table>

### Active Investors in Late Stage (last 5 years)

<table>
<thead>
<tr>
<th>Investor</th>
<th>Firm</th>
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<tbody>
<tr>
<td>Mayfield</td>
<td>Simplilearn</td>
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<tr>
<td>Verlinvest</td>
<td>Byjus</td>
</tr>
</tbody>
</table>

Source: Tracxn
Online Learning and EdTech Technology providers secured two-third of all funding till date

<table>
<thead>
<tr>
<th>Category</th>
<th>% of Total Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Video Tutorials</td>
<td>7%</td>
</tr>
<tr>
<td>Massive Open Online Courses</td>
<td>10%</td>
</tr>
<tr>
<td>Learning Management System</td>
<td>18%</td>
</tr>
<tr>
<td>Assessment Platforms</td>
<td>23%</td>
</tr>
<tr>
<td>Virtual Classrooms</td>
<td>42%</td>
</tr>
<tr>
<td>Offline Delivery</td>
<td>18%</td>
</tr>
<tr>
<td>In-House Tutors</td>
<td>18%</td>
</tr>
<tr>
<td>Higher Education K-12</td>
<td>10%</td>
</tr>
<tr>
<td>Language Learning Higher Education</td>
<td>10%</td>
</tr>
<tr>
<td>Others</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: Tracxn
Established players going for EdTech acquisitions/acqui-hires for portfolio diversification and sector attractiveness

Source: Tracxn
EdTech: Evolving Business Models
Product offerings in EdTech are widespread, hence making it a very fragmented market.
EdTech: Drivers and Challenges
Drivers for EdTech

**INTERNET PENETRATION**
Increasing reach and lowering cost of internet allows large population to come online and have the access to this market

**BANDWIDTH INCREASE**
With increasing internet bandwidth, watching video content online has become easy

**DIGITAL CAMPAIGNS**
Multiple government Digital campaign will give a boost to Edtech sector

**MODE OF DELIVERY**
Dissatisfaction in current education system will move people towards new delivery mode

**POPULATION**
Rise in middle class population will push for education demand

**LOW COST**
Online education provides a low cost alternative

**DISPOSABLE INCOME**
Rise in disposable income across the countries will push Edtech

**JOB SEARCH**
Growing job seekers will demand industry specific trainings

Source: NASSCOM Analysis
EdTech sector seeing exponential growth but still faces multiple challenges...

**Content Pricing**
High pricing of content makes it hard to reach masses

**Adaptation**
Adapting to new technology difficult for School teachers and Institution

**Financial Constraints**
Adopting new technology requires funding

**Creating Customized Solution**
Providing customer specific customized solution is difficult

**Availability of Free Content**
Easy access to free content impacts the volume growth in this business

**Scaling of Business**
Being a highly fragmented sector, business scalability is challenging

**Language Barrier**
Most of the digital education is still in English

**Misperception**
Misperception between an ERP and an Education Management Platform

Source: NASSCOM Analysis
2019 Trends
2019 Tech Trends Highlight Technology Integration Opportunities for Universities

GARTNER’S LIST OF TOP TECH TRENDS FOR 2019:

- Autonomous things
- Augmented analytics
- AI-driven development
- Digital twins
- Empowered edge
- Immersive technologies
- Blockchain
- Smart spaces
- Digital ethics and privacy
- Quantum computing

Investments in current technology like virtual reality and AI could have major implications for higher education in 2019.
Promising technological trends - expected to collectively change the way students learn and teachers teach

- Computational Thinking, coding & Robotics Will Grow
- Gamification to Continue Penetrating the Learning Process
- Device Mesh to Witness Further Growth
- Personalized Learning will continue to Spread
- Augmented & Virtual Reality to become Commonplace
- Artificial Intelligence & Machine Learning

Source: Your Story, NASSCOM Analysis
The Launchpad you need to chase your dreams!!

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DESIRE to Learn?
Don’t know where to ENDEAVOUR?
Don’t know how to ACHIEVE?
EduQUEST helps you explore.
Desire | Endeavour | Achieve

Our Mission
One-stop-platform and an endeavour of passionate individuals with an aim to build the future of Education and Skill Development in Cambodia.
Education is the building block of a functional society. In fact it’s no stretch to say it’s the mortar that holds it together.

"Why Education?"

"Education and Skills Gap in Cambodia"

The Biggest Challenge

- Information on Education
- Lack of Quality Education for Young and Dynamic population
- Industries need Skilled workers to compete in Global Markets
Our Partners
NO NEED TO WORRY NOW!!!! YAY !!!
EDUQUEST HUB IS HERE TO ADDRESS THE CONCERNS...
Education is the most powerful weapon which you can use to CHANGE THE WORLD!!

Nelson Mandela

Thank You