Holon IQ

Global Education. Innovation, Investment & Technology

Patrick Brothers, Co-CEO HolonIQ

METAEDU SUMMIT 2020

December 2020

We are building the world's smartest source of global education intelligence to power decisions that matter.
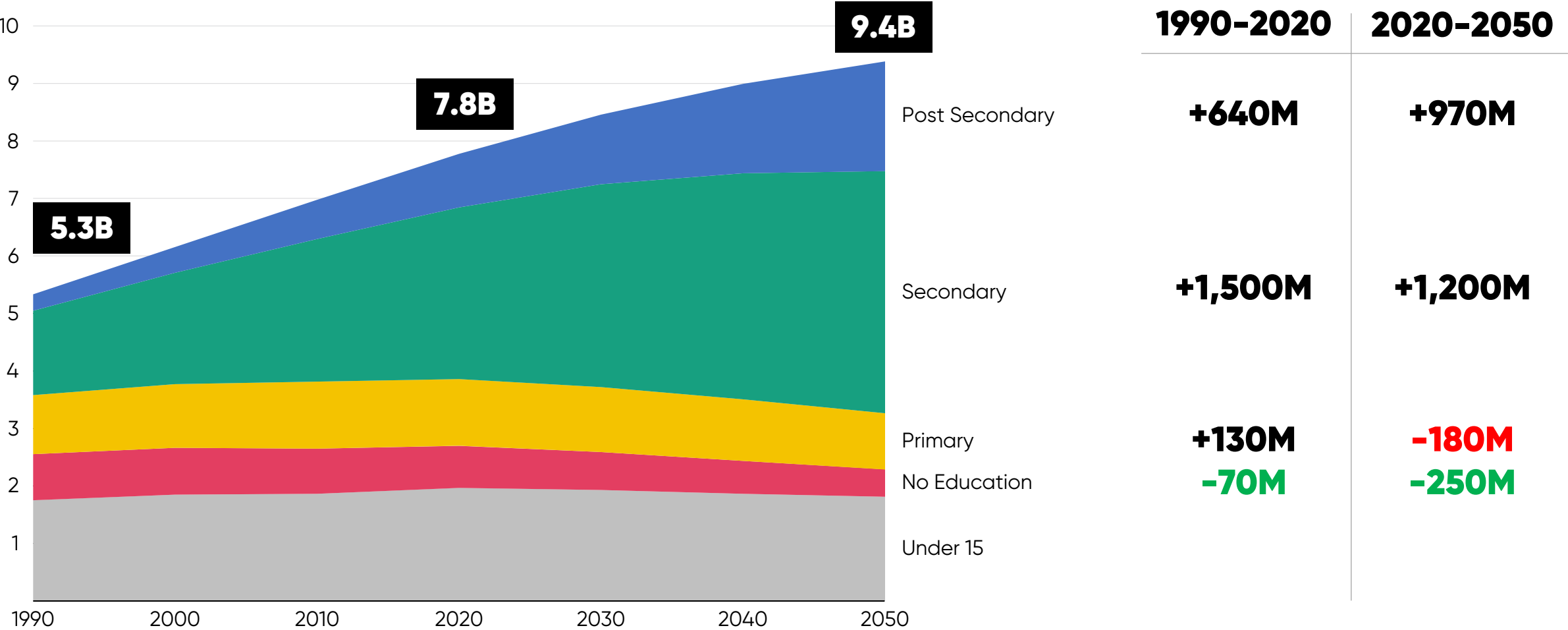
Agenda

Size and Shape

Holon IQ

2 Billion more learners between now and 2050

Global Population by Highest Level of Education Attainment.
Billions of People (1990-2050F)

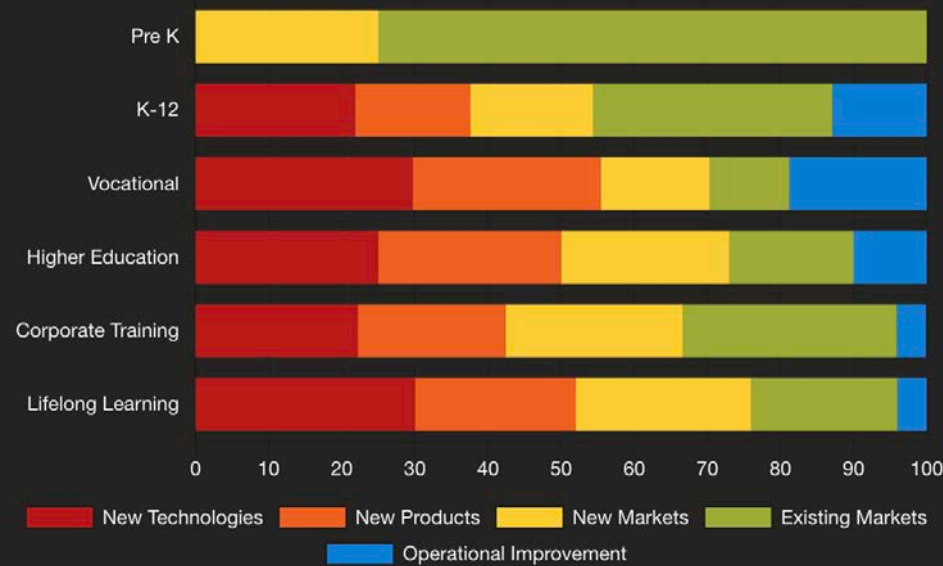|	1990-2020	2020-2050
Post Secondary	+640M	+970M
Secondary	+1,500M	+1,200M
Primary	+130M	–180M
No Education	–70M	–250M

Disruption & Growth Strategy.

Almost 85% of respondents expect disruption to their part of the education market before 2025 - 57% of those expecting disruption within the next 24 months. Almost a quarter of respondents cite technology as their top growth strategy going forward, an increase of 10% over the past two surveys.
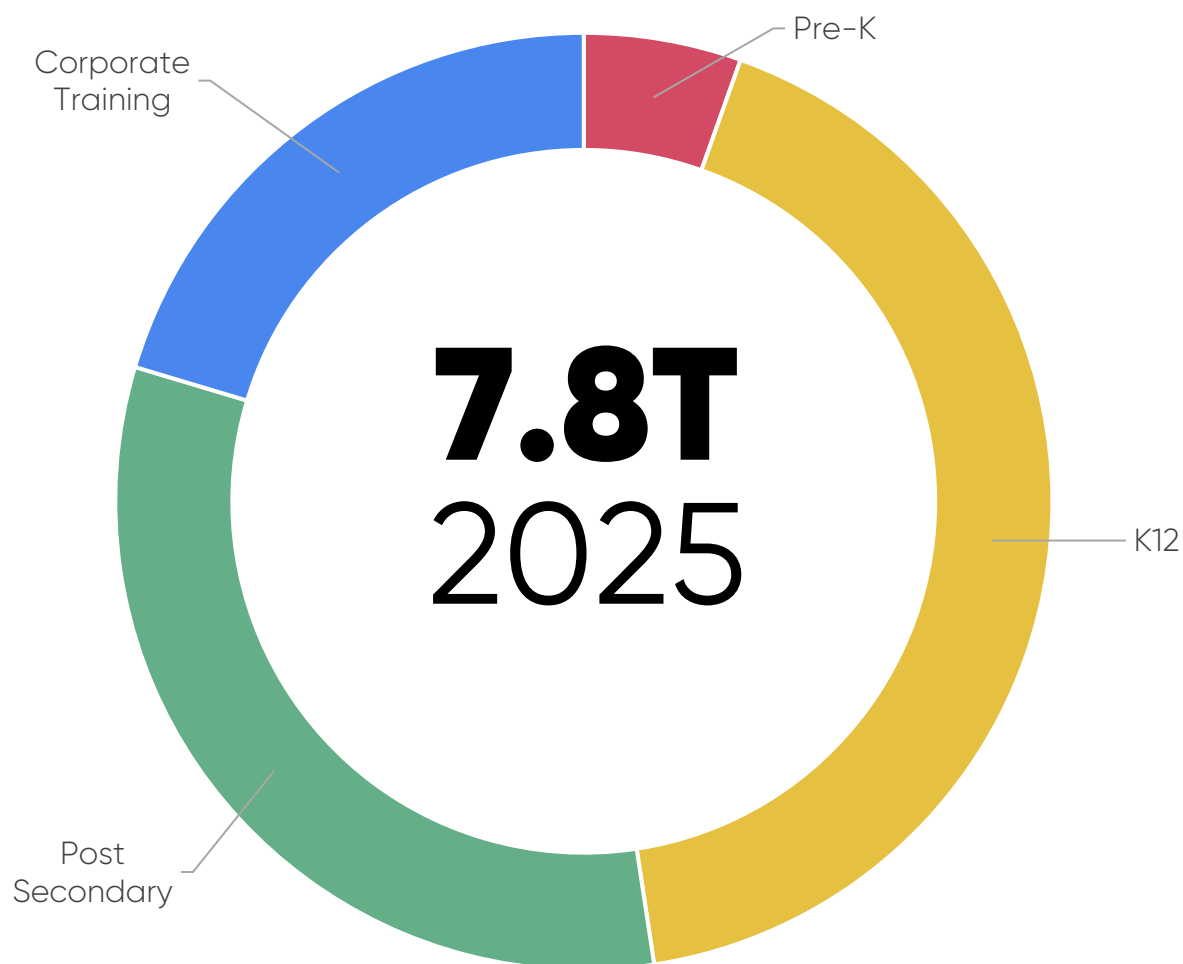

Disruption Expectations by Sector, March 2020

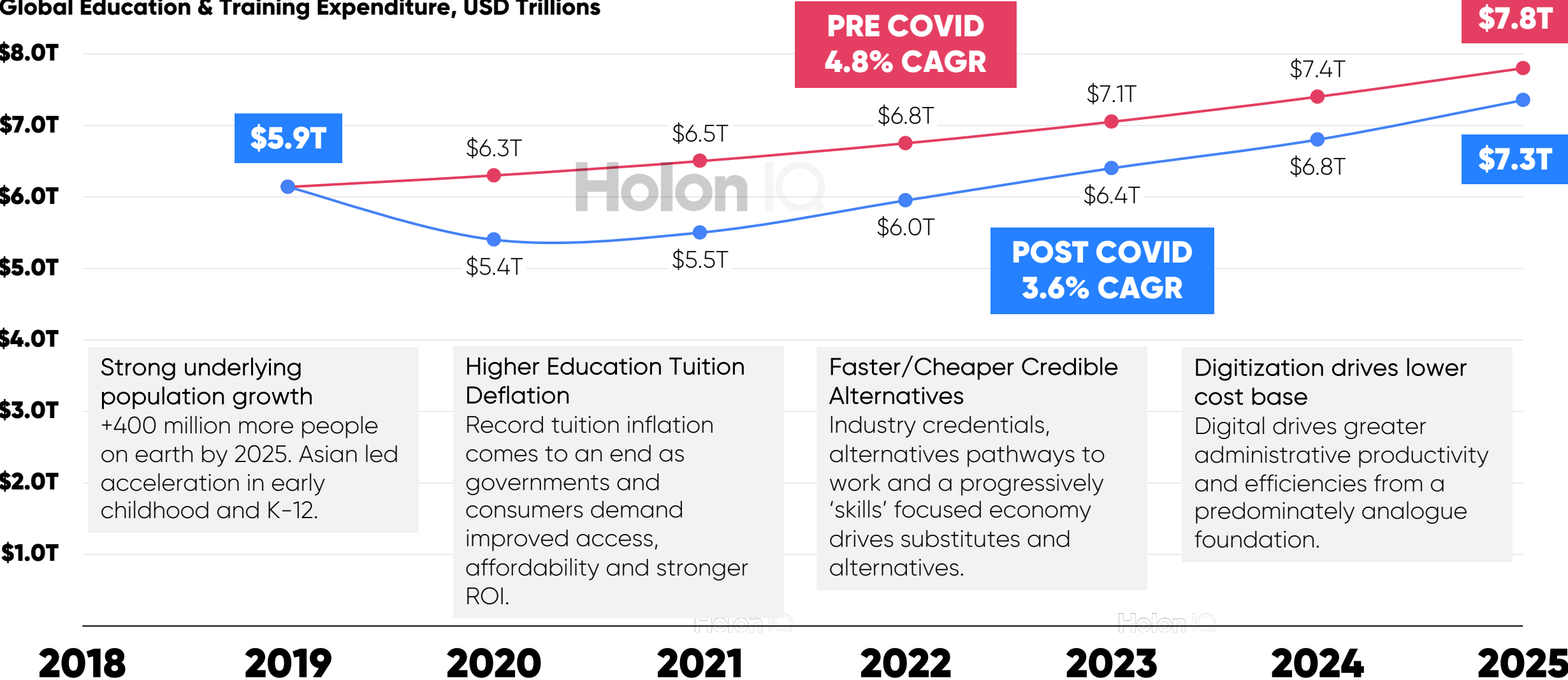Top Growth Strategy by Sector, March 2020

Source: HolonIQ, 28 March 2019

Pre-COVID Growth Expectations

Corporate Training
Pre-K
K12
Post Secondary

5.9T 2018

Corporate Training
Pre-K
K12
Post Secondary

7.8T 2025

Source: HolonIQ, 28 January 2019

Holon IQ
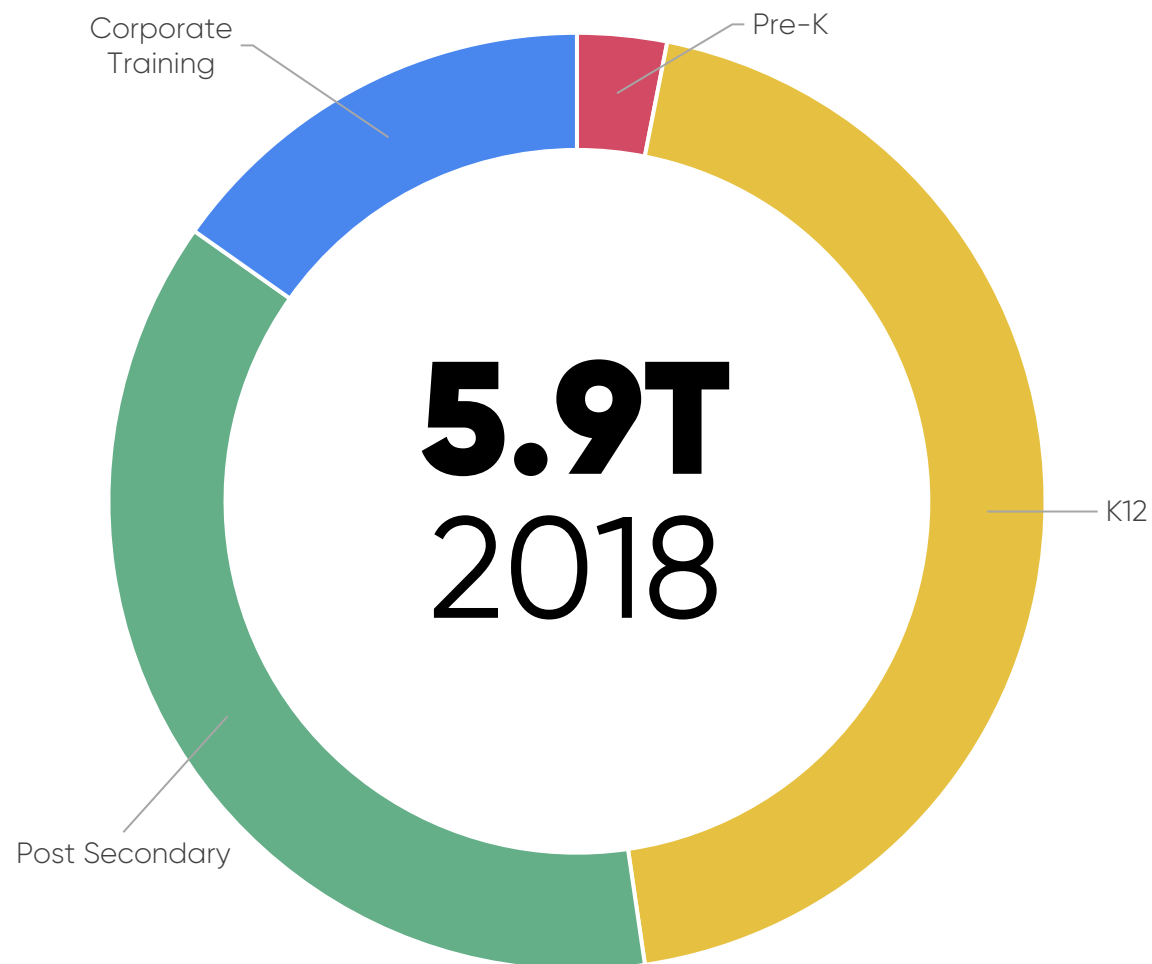
Material changes to global education

Global Education & Training Expenditure, USD Trillions

**PRE COVID
4.8% CAGR**

**POST COVID
3.6% CAGR**

$5.9T · $6.3T · $6.5T · $6.8T · $7.1T · $7.4T · $7.8T

$5.4T · $5.5T · $6.0T · $6.4T · $6.8T · $7.3T

$8.0T
$7.0T
$6.0T
$5.0T
$4.0T
$3.0T
$2.0T
$1.0T

2018 2019 2020 2021 2022 2023 2024 2025

Strong underlying population growth
+400 million more people on earth by 2025. Asian led acceleration in early childhood and K–12.

Higher Education Tuition Deflation
Record tuition inflation comes to an end as governments and consumers demand improved access, affordability and stronger ROI.

Faster/Cheaper Credible Alternatives
Industry credentials, alternatives pathways to work and a progressively 'skills' focused economy drives substitutes and alternatives.

Digitization drives lower cost base
Digital drives greater administrative productivity and efficiencies from a predominately analogue foundation.

EdTech is accelerating

Global 'EdTech' Expenditure, USD Billions

5.2% Digital Spend

$404B

POST COVID 16.3% CAGR

2.7% Digital Spend

$163B

$227B

$268B

$295B

$327B

$365B

$341B

PRE COVID 13.1% CAGR

$203B

$223B

$247B

$272B

$304B

Short Term Surge, Long Term Transition.
Rough start to remote learning, normalising into sustained long-term digital integration.

Digital Infrastructure 'Catch-Up'
LMS, SIS, Cloud, Privacy, Security. Most schools and colleges are at the start of a long digital maturity journey.

Rise of B2C EdTech models.
Students, parents and workers all looking for learning support, upskilling and other direct outcomes.

Mobile and Advanced Technology Enablers
Mobile, personalised, unbundled, social & gamified learning driven by mobility, big data, cloud and AI/ML.

	2018	2019	2020	2021	2022	2023	2024	2025
Total Expenditure		$5.9T	$6.3T	$6.5T	$6.8T	$7.1T	$7.4T	$7.8T
Digital Expenditure		$163B	$227B	$268B	$295B	$327B	$365B	$404B
Digital Share		2.7%	3.6%	4.1%	4.3%	4.6%	4.9%	5.2%

Innovation across the entire Learner Lifecycle

Early
Childhood

K12

Higher
Education

Workforce
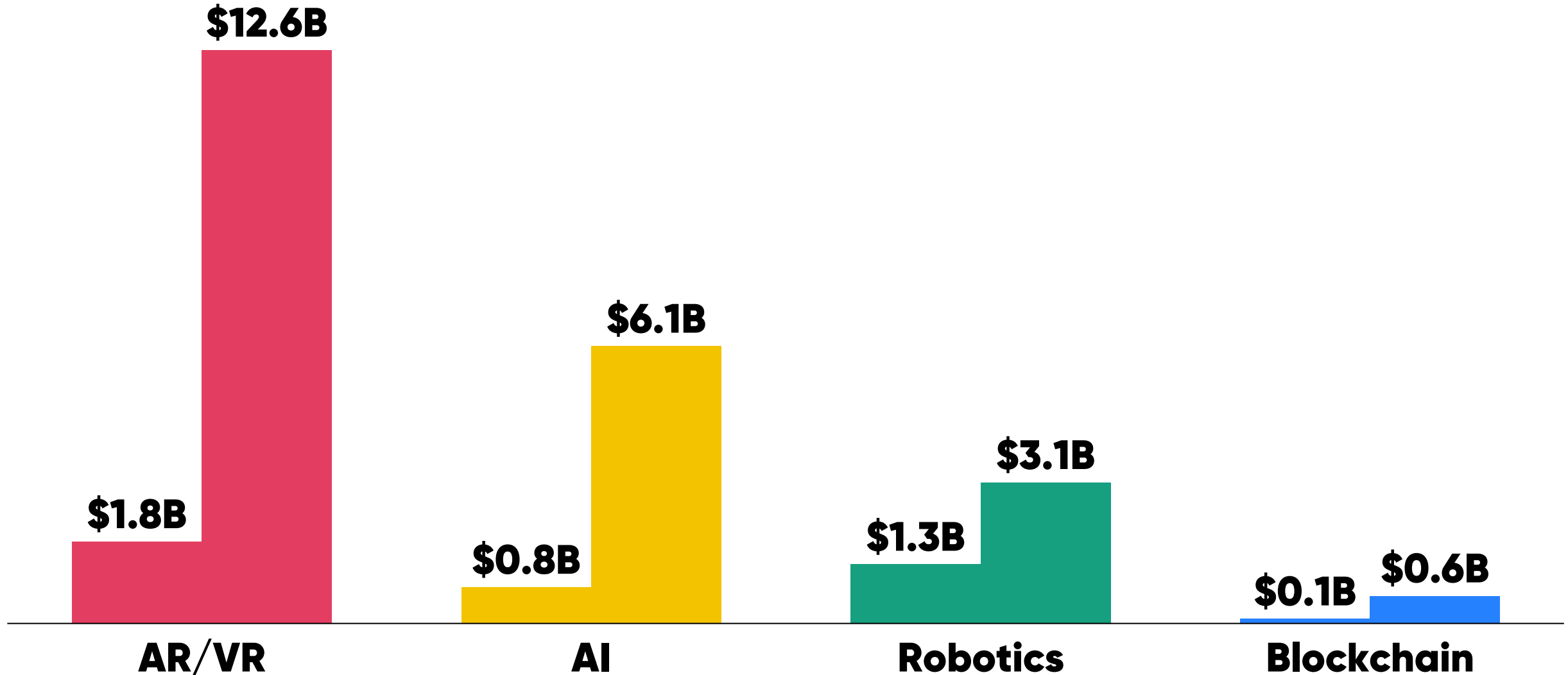
Global AI Strategy Landscape

Australia. 'Prosperity Through Innovation'
Four-year, $21m investment from national budget to support development of AI.

China. 'Next Generation AI'
Launched July 2017, the most comprehensive AI strategy globally with 2030 targets for a $1T RMB AI industry

France. 'AI for Humanity'
€1.5 billion plan announced in 2018 in the 'Villani Report' to transform France into a global leader in AI.

Ireland. 'AI Island'
Irish Economic Development Agency led process. AI Master program launched in 2018 and is 100% industry driven.

Kenya. Blockchain and AI Task Force
Task Force established Feb 2018 with a five-year planning horizon.

New Zealand. AI Forum
May 2018, AI Forum released a report titled, "Artificial Intelligence: Shaping a Future New Zealand."

Singapore. 'AI Singapore'
S$150m, five-year national program launched May 2017.

Sri Lanka
National Expert Strategy Advisory Committee announced Aug 2018 working on AI Strategy for Sri Lanka

UAE
Announced in Oct 2017. First country to create a Ministry of AI and first in the Middle East to launch an AI strategy

Austria. 'Robot Council'
Established a Robot Council in August 2017, with a one million euros working budget from the Ministry of Infrastructure.

Denmark. 'Digital Growth Strategy'
Broader policy focused on Big Data and IoT launched Jan 2018.

Germany.
€3 billion plan announced Nov 2018 with a dedicated AI strategy to make Germany & Europe a global leader in AI.

Israel. 'StartUp Nation needs AI Policy'
Innovation Authority, tasked with AI policies, has warned that a strategy is needed to prevent falling behind.

Malaysia. National AI Framework
National AI Framework launched in 2018 led by MDEC, expanding the National Big Data Analytics Framework.

Poland. Roundtable
May 2018 Roundtable on AI Strategy focused on healthcare, public administration, education & cybersecurity

Saudi Arabia. 'Robot Citizenship'
Became the first country to grant citizenship to a robot in October 2017. No dedicated AI strategy yet.

Sweden
National Approach for Artificial Intelligence launched in May 2018.

United Kingdom. 'AI Sector Deal'
Announced in April 2018. $1.24B funding as part of the UK's larger industrial strategy.

Brazil. 'E-Digital Strategy'
E-Digital Strategy addresses digital transformation including AI

Estonia. AI Task Force
E-governance forerunner, initially focused on autonomous cars, now building a broader AI strategy.

India. 'Social Inclusion and AI Garage'
Jun 2018 working paper on using AI to ensure social growth, inclusion and positioning the country as a leader in AI

Italy. 'At the Service of Citizens'
Interdisciplinary AI Task Force launched by 'Digital Italy'. White paper March 2018, 'AI: At the Service of Citizens".

Malta. 'Malta.ai'
Malta.ai launched Mar 2019 to share vision and process towards an AI strategy.

Qatar. Feb 19 Blueprint
Qatar Center for Artificial Intelligence (QCAI) launched National AI Strategy for Qatar. Announced on 7 February 2019.

South Africa. 'IFPTI considers AI'
Intsimbi Future Production Technologies Initiative" launched in 2018 with aim to advancing manufacturing sector.

Taiwan. 'Taiwan AI Action Plan'
Four-year plan launched January 2018, with 350m annual budget.

United States. 'American AI Initiative'
Launched Feb 2019 by Executive Order promote and protect AI technology. AI.gov launched Mar 2019.

Canada. 'Pan-Canadian AI Strategy'
Five-year, $125m plan announced in 2017 federal budget. Led by CIFAR. Research and talent focus.

Finland. Steering Group
Steering Group appointed May 17 releasing two interim reports. Full strategy expected very soon.

Indonesia
Leading Asia-Pacific market in the adoption of and plans for AI however no dedicated AI strategy as yet

Japan. 'Society 5.0'
Strategy launched in 2017 to create sustainable solutions for better human life in Japan.

Mexico. 'Towards an AI Strategy'
Commissioned by the British Embassy in Mexico and released in June 2018. Sets foundations for a national AI strategy.

Russia. Mar 18 Conference
March 2018 conference made 10 policy recommendations. National Strategy expected very soon.

South Korea
Five-year AI development plan launched May 2018 with $1.95B budget.

Tunisia
AI Task Force and Steering Committee appointed in April 2018. Strategy expected very soon

Global Learning Landscape

'Bottom Up' – Machine Learning

In order to support the development of the taxonomy, we initially undertook 'bottom-up' analysis using HolonIQ's proprietary machine learning and artificial intelligence to analyze 60,000+ education organizations worldwide.

The analysis identified natural patterns in the data using uses 'Unsupervised Learning' to explore new approaches to clustering and segmentation that are not anchored or biased by the more established and traditional taxonomies of education.

The visualization on the right-hand side of the page for example is exploring the network of organizations in a single country. Organizations that are similar in how they support learners, parents, schools and institutions are clustered together based on the segments they service and the models and technologies they employ.
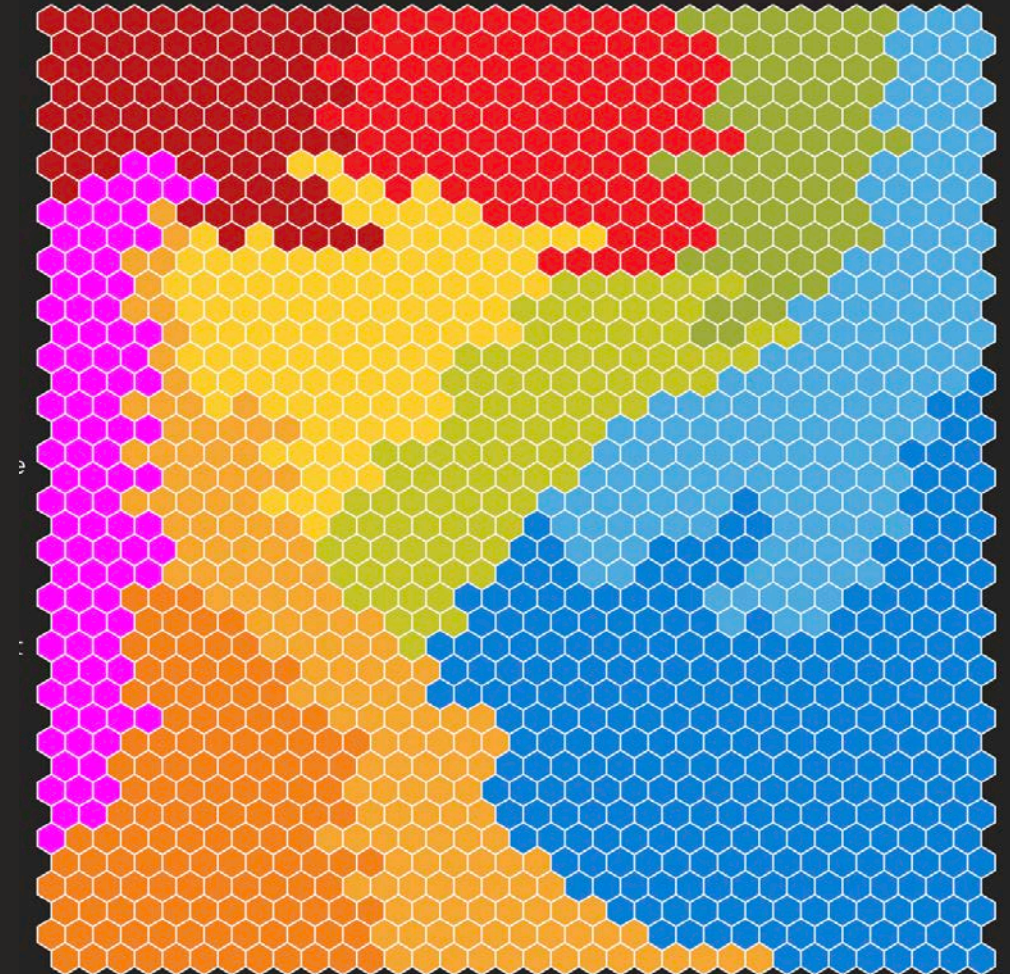
'Top Down' - Human Expertise
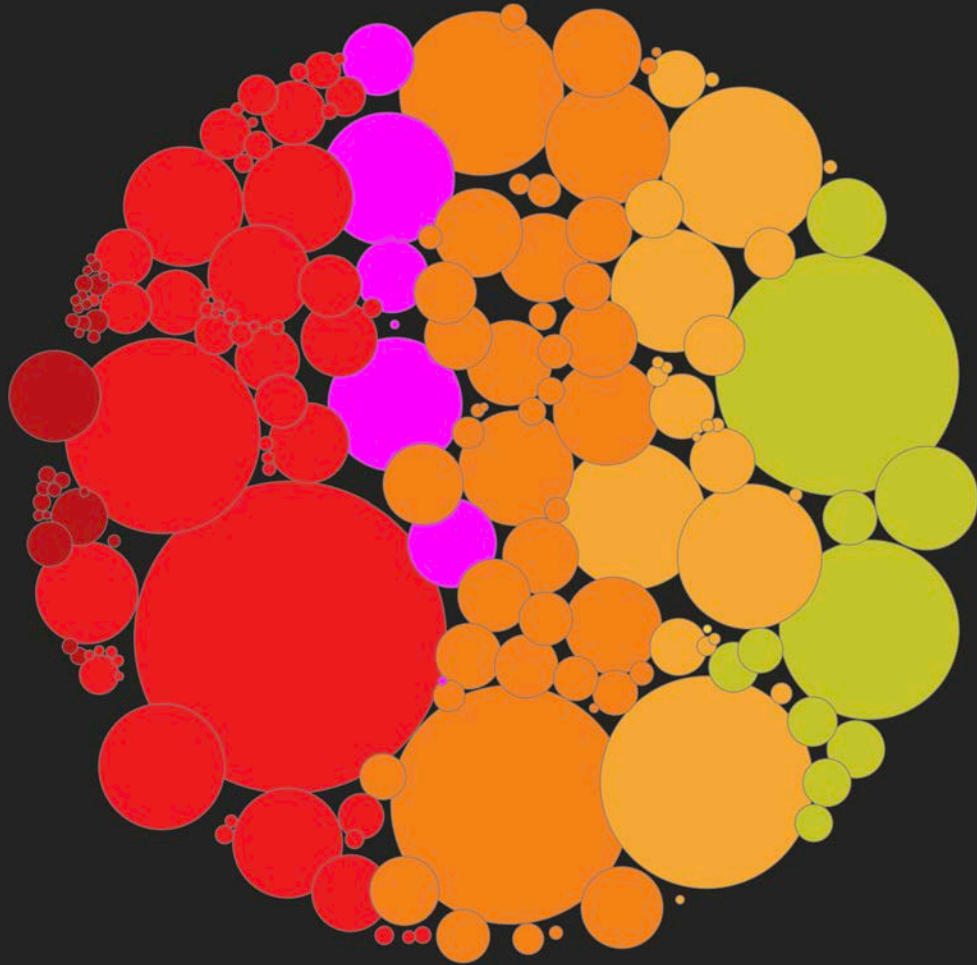
HolonIQ's Education Intelligence Unit and our global network of experts from early childhood to lifelong learning bring deep expertise to our 'top-down' approach.

The top-down analysis draws on the data-driven foundations of the bottom-up analysis to interpret patterns that the machine learning and artificial intelligence process produced.

Considerations include context, history, purpose, business model, technologies and ecosystem relationships to add depth and interpretive understanding to the process. This also enables validation of findings against the models and innovations found in education today or expected in the future.

Global Learning Landscape

HolonIQ

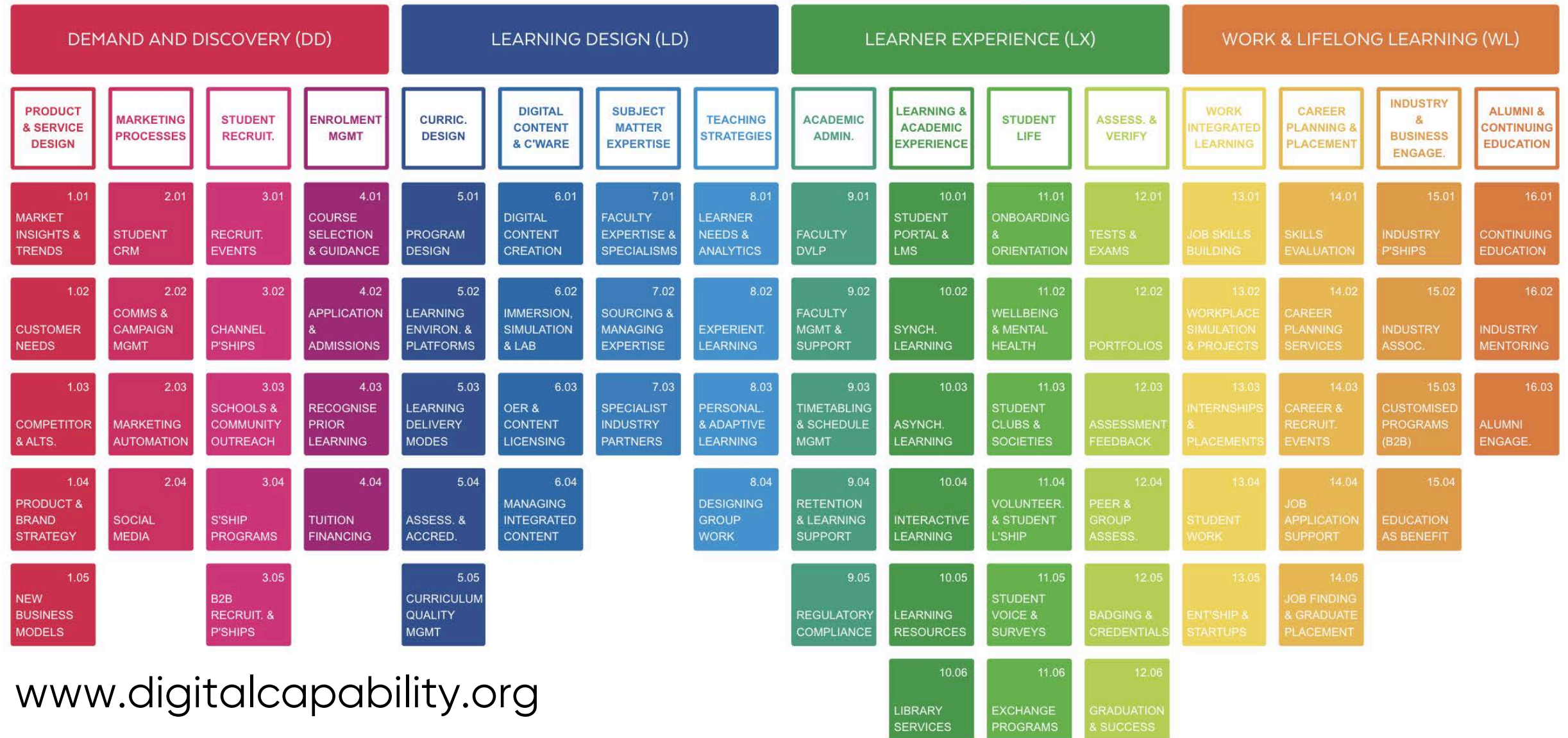| Knowledge & Content	Education Management	Traditional Models	New Delivery Models	Experiencing Learning	International Education	Learning Support	Assessment & Verification	Workforce & Talent	Skills & Jobs
K 1 Knowledge B2B, B2C	**Em** 6 Management B2B	**Pk** 11 Pre K B2C	**Mo** 16 MOOC B2C, B2B2C	**X** 21 XR, AR, VR B2C, B2B2C	**L** 26 Language Lrn B2C	**Tr** 31 Teacher P2P, B2C	**A** 36 Assessment B2B, B2B2C	**Wp** 41 Workforce B2B	**Us** 46 UpSkilling B2C, P2P
Or 2 Op Research P2P, B2C	**Le** 7 Learning Env B2B	**S** 12 School B2C	**Pr** 17 Prop Online B2C, B2B2C	**Ro** 22 Robotics B2C, B2B2C	**Lt** 27 Language Test B2C	**Sn** 32 Study Notes B2C, P2P	**Po** 37 Portfolio B2C, B2B2C	**T** 42 Talent Acq B2B	**It** 47 Internships B2C, B2B2C
Cu 3 Curriculum B2B	**Ct** 8 Class Tech B2B	**V** 13 Vocational B2C	**Op** 18 OPM B2B	**Ai** 23 Voice & Chat B2C, B2B2C	**Di** 28 Discovery B2B2C, B2C	**As** 33 After School B2C, P2P	**C** 38 Credentialing B2B2C, B2C	**Cd** 43 Development B2B2C	**At** 48 Apprenticeship B2C, B2B2C
Er 4 Ed Resources B2B, B2C	**Ad** 9 Admissions B2B	**Al** 14 Alternate B2C	**Bc** 19 Bootcamp 2.0 B2C, B2B2C	**Ga** 24 Games & Sim B2C, B2B2C	**Is** 29 Intl Schools B2C	**Tu** 34 Tutoring P2P, B2C	**Cp** 39 Career B2C, B2B	**Pm** 44 Performance B2B	**Gi** 49 Gigs P2P, B2B2C
Qa 5 Q&A P2P	**Fi** 10 Finance B2C	**U** 15 University B2C	**Ap** 20 Apps B2C, P2P	**St** 25 STEM/Coding B2C, B2B2C	**In** 30 Intl Study B2C, B2B2C	**Tp** 35 Test Prep B2C	**Sv** 40 Verification B2B2C, B2C	**Wl** 45 Wellness B2B, B2B2C	**Mn** 50 Mentoring P2P
Gg 51 Global Giants B2B, B2C	**I** 52 Investors B2B	**Ac** 53 Accelerators B2B	**Ev** 54 Events B2C, B2B	**Aw** 55 Awards B2B, B2C					

globallearninglandscape.org

Higher Education Digital Capability Framework

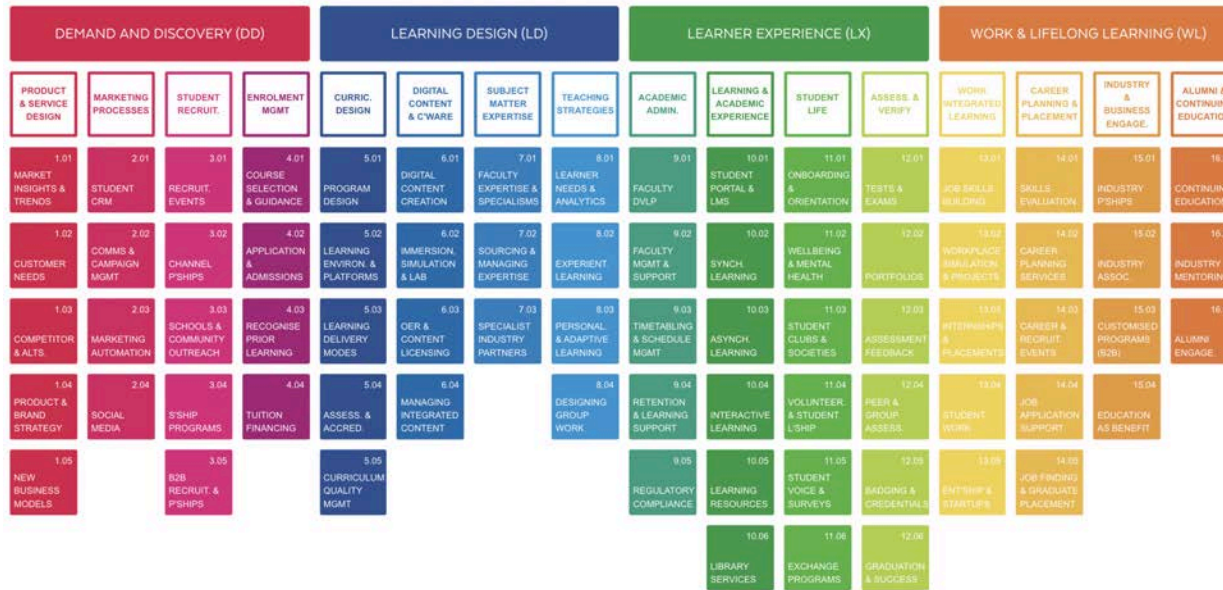| DEMAND AND DISCOVERY (DD)				LEARNING DESIGN (LD)				LEARNER EXPERIENCE (LX)				WORK & LIFELONG LEARNING (WL)			
PRODUCT & SERVICE DESIGN	MARKETING PROCESSES	STUDENT RECRUIT.	ENROLMENT MGMT	CURRIC. DESIGN	DIGITAL CONTENT & C'WARE	SUBJECT MATTER EXPERTISE	TEACHING STRATEGIES	ACADEMIC ADMIN.	LEARNING & ACADEMIC EXPERIENCE	STUDENT LIFE	ASSESS. & VERIFY	WORK INTEGRATED LEARNING	CAREER PLANNING & PLACEMENT	INDUSTRY & BUSINESS ENGAGE.	ALUMNI & CONTINUING EDUCATION
1.01 MARKET INSIGHTS & TRENDS	2.01 STUDENT CRM	3.01 RECRUIT. EVENTS	4.01 COURSE SELECTION & GUIDANCE	5.01 PROGRAM DESIGN	6.01 DIGITAL CONTENT CREATION	7.01 FACULTY EXPERTISE & SPECIALISMS	8.01 LEARNER NEEDS & ANALYTICS	9.01 FACULTY DVLP	10.01 STUDENT PORTAL & LMS	11.01 ONBOARDING & ORIENTATION	12.01 TESTS & EXAMS	13.01 JOB SKILLS BUILDING	14.01 SKILLS EVALUATION	15.01 INDUSTRY P'SHIPS	16.01 CONTINUING EDUCATION
1.02 CUSTOMER NEEDS	2.02 COMMS & CAMPAIGN MGMT	3.02 CHANNEL P'SHIPS	4.02 APPLICATION & ADMISSIONS	5.02 LEARNING ENVIRON. & PLATFORMS	6.02 IMMERSION, SIMULATION & LAB	7.02 SOURCING & MANAGING EXPERTISE	8.02 EXPERIENT. LEARNING	9.02 FACULTY MGMT & SUPPORT	10.02 SYNCH. LEARNING	11.02 WELLBEING & MENTAL HEALTH	12.02 PORTFOLIOS	13.02 WORKPLACE SIMULATION & PROJECTS	14.02 CAREER PLANNING SERVICES	15.02 INDUSTRY ASSOC.	16.02 INDUSTRY MENTORING
1.03 COMPETITOR & ALTS.	2.03 MARKETING AUTOMATION	3.03 SCHOOLS & COMMUNITY OUTREACH	4.03 RECOGNISE PRIOR LEARNING	5.03 LEARNING DELIVERY MODES	6.03 OER & CONTENT LICENSING	7.03 SPECIALIST INDUSTRY PARTNERS	8.03 PERSONAL. & ADAPTIVE LEARNING	9.03 TIMETABLING & SCHEDULE MGMT	10.03 ASYNCH. LEARNING	11.03 STUDENT CLUBS & SOCIETIES	12.03 ASSESSMENT FEEDBACK	13.03 INTERNSHIPS & PLACEMENTS	14.03 CAREER & RECRUIT. EVENTS	15.03 CUSTOMISED PROGRAMS (B2B)	16.03 ALUMNI ENGAGE.
1.04 PRODUCT & BRAND STRATEGY	2.04 SOCIAL MEDIA	3.04 S'SHIP PROGRAMS	4.04 TUITION FINANCING	5.04 ASSESS. & ACCRED.	6.04 MANAGING INTEGRATED CONTENT		8.04 DESIGNING GROUP WORK	9.04 RETENTION & LEARNING SUPPORT	10.04 INTERACTIVE LEARNING	11.04 VOLUNTEER. & STUDENT L'SHIP	12.04 PEER & GROUP ASSESS.	13.04 STUDENT WORK	14.04 JOB APPLICATION SUPPORT	15.04 EDUCATION AS BENEFIT	
1.05 NEW BUSINESS MODELS		3.05 B2B RECRUIT. & P'SHIPS		5.05 CURRICULUM QUALITY MGMT				9.05 REGULATORY COMPLIANCE	10.05 LEARNING RESOURCES	11.05 STUDENT VOICE & SURVEYS	12.05 BADGING & CREDENTIALS	13.05 ENT'SHIP & STARTUPS	14.05 JOB FINDING & GRADUATE PLACEMENT		
									10.06 LIBRARY SERVICES	11.06 EXCHANGE PROGRAMS	12.06 GRADUATION & SUCCESS				

www.digitalcapability.org

Diagnosis and Action

The Open Source Framework identifies key domains and capabilities required for digital delivery across the whole student lifecycle and provides a structure to facilitate cross-institution conversations. It is designed to allow flexibility and interpretation in context. The 70+ capability blocks can be used to assess institutional strength in areas of strategic priority, to conduct internal and external benchmarking and ultimately to guide strategic procurement decisions.

Open Source HEDC Framework

Tools to support capability building and decision making

Institutional diagnostic survey

Self-assessment against 60+ digital capabilities

Benchmarked results

Internal and external benchmarking

Strategic decisions & digital choices

Buy | Build | Partner

People | Process | Tech

Investment and Funding Flows

$26B+ of venture capital fueling social impact.

Global Education and Health Venture Capital Funding, Q1-Q3 2020 in USD Billions

Global EdTech vs HeathTech VC. Q1-Q3 2020

- ■ Asia
- ■ North America
- ■ Europe
- ■ RoW

8.2B
- 0.2
- 0.5
- 1.9
- 5.6

EdTech

18.0B
- 1.4
- 0.1
- 3.8
- 12.7

HealthTech
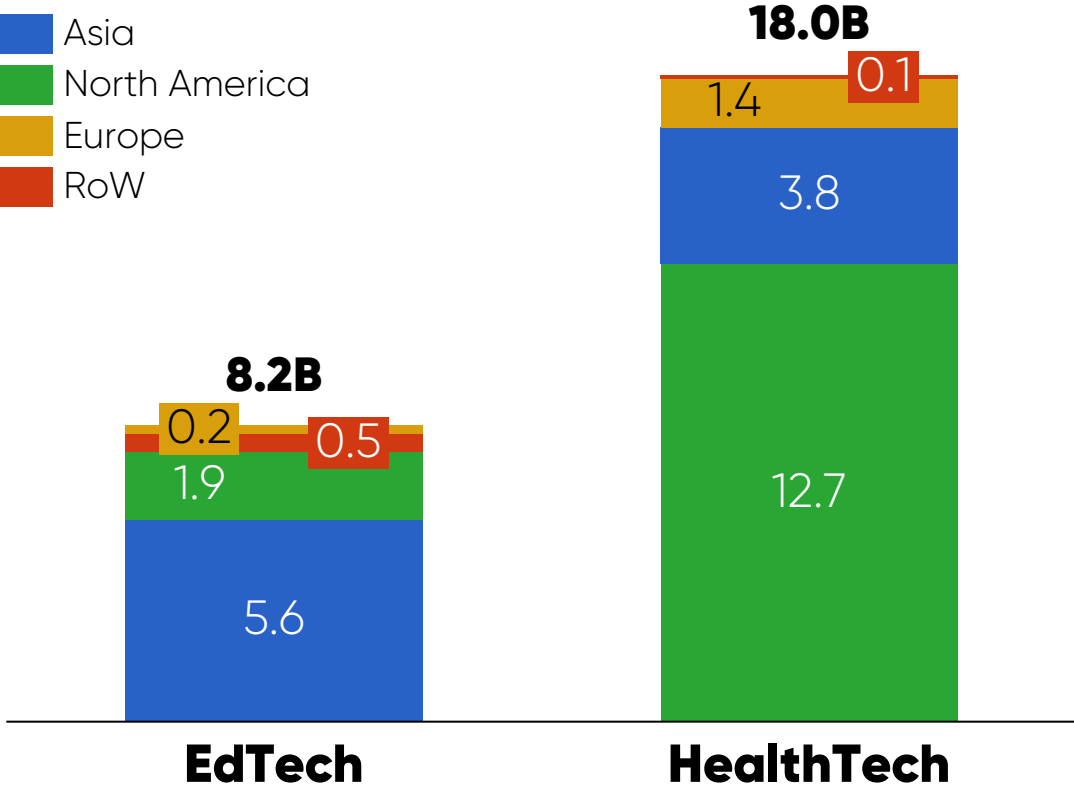
Regional VC Investment Share. Q1-Q3 2020
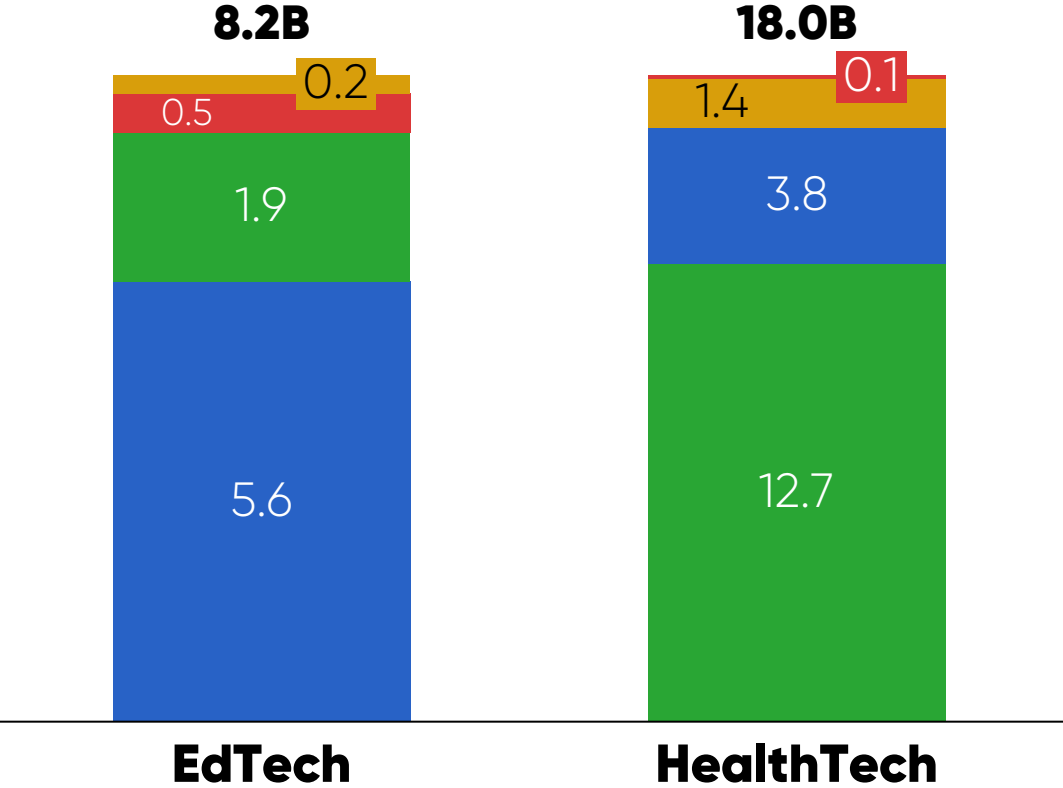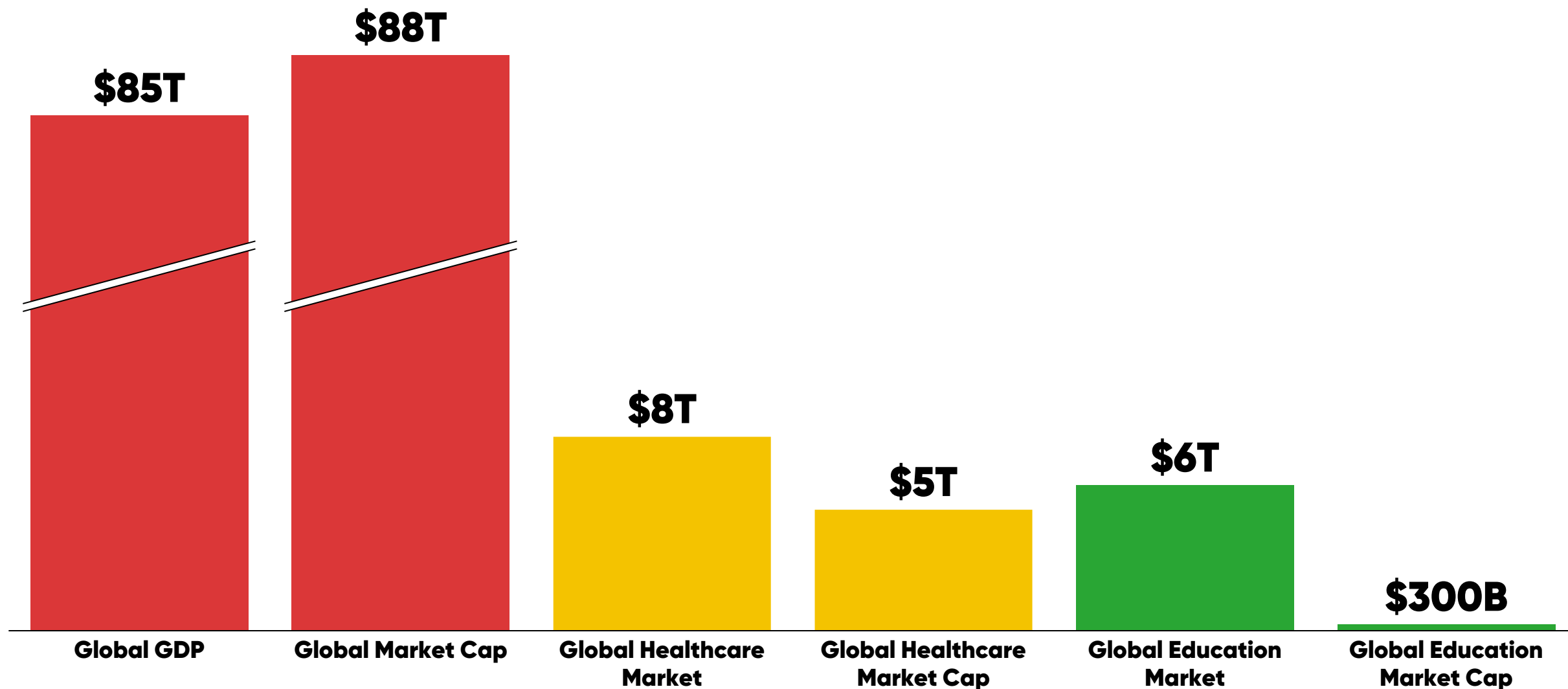
8.2B
- 0.2
- 0.5
- 1.9
- 5.6

EdTech

18.0B
- 1.4
- 0.1
- 3.8
- 12.7

HealthTech

$8.3B of Global EdTech VC 2020 after Q3.

Global Education Venture Capital Funding, 2010-3Q2020 in USD Billions

Region	Value
China	20.3B
USA	12.5B
India	3.8B
Europe	2.0B
RoW	2.1B

Year	Value
2010	0.5B
2011	0.7B
2012	0.9B
2013	1.3B
2014	1.8B
2015	4.2B
2016	3.2B
2017	4.4B
2018	8.2B
2019	7.0B
3Q20	8.3B

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$8.3B of Global EdTech VC 2020 after Q3.

Global Education Venture Capital Funding, 2010-3Q2020 in USD Billions

0.5B	0.7B	0.9B	1.3B	1.8B	4.2B	3.2B	4.4B	8.2B	7.0B	8.3B
2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	3Q20

Legend:
- US
- China
- India
- Europe
- RoW
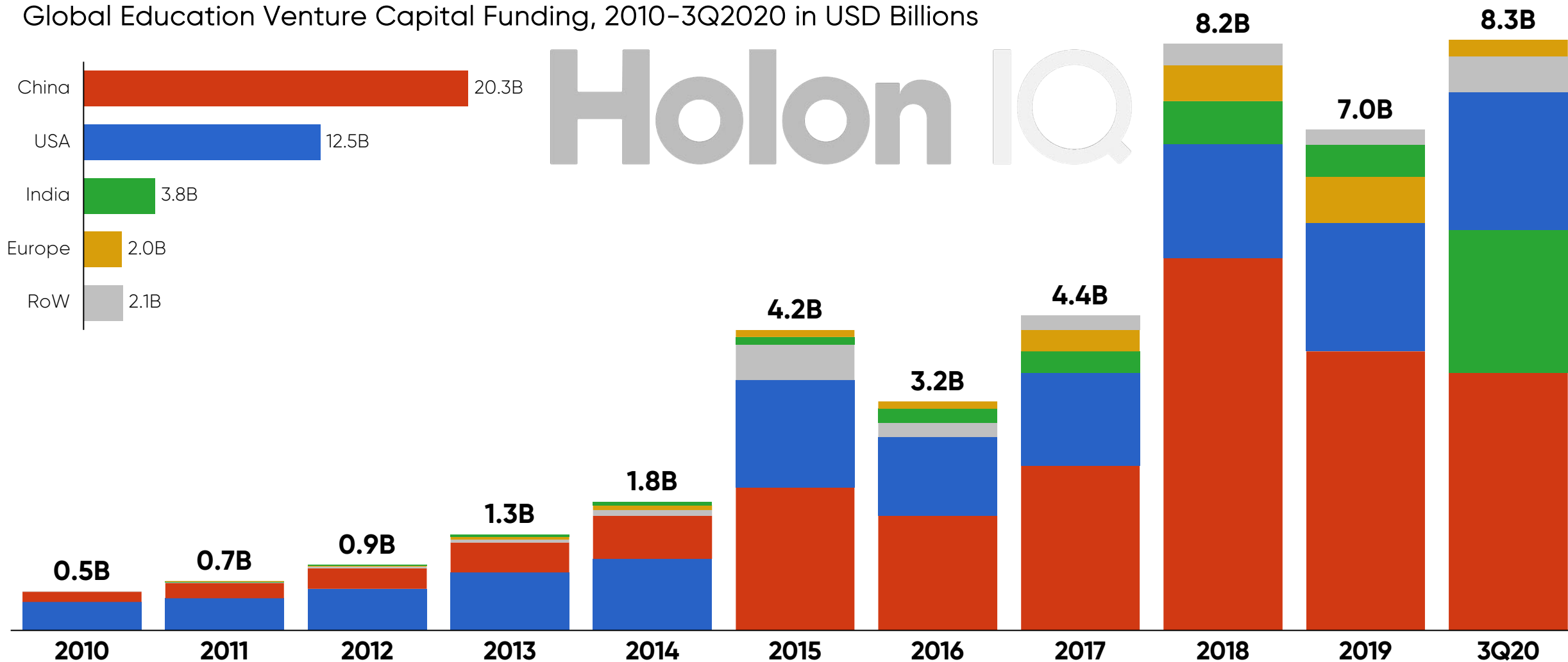
www.holoniq.com
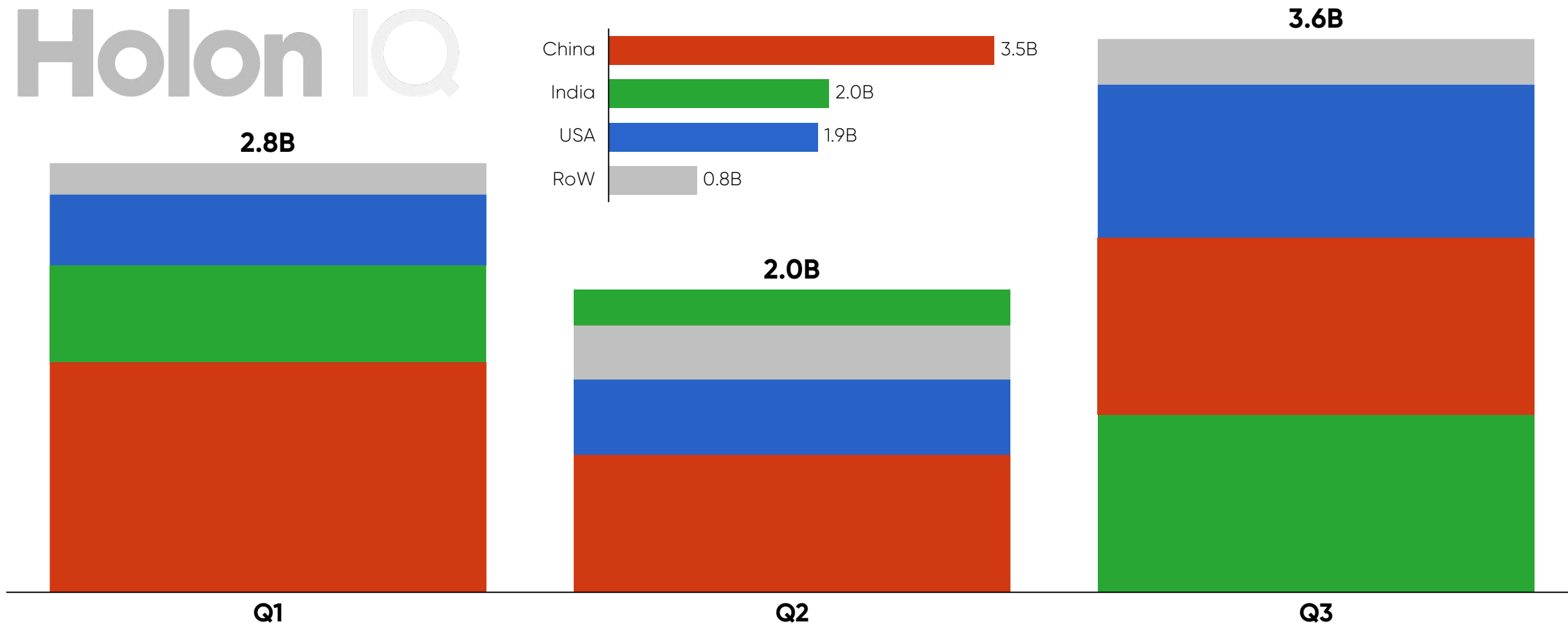
Strong supply of capital with more focused investors

Rethink Education
Rethink Education is a venture capital fund focus...
88 investments in 62 companies

GSV Ventures
GSV Ventures backs innovative learning and talen...
69 investments in 42 companies

Emerge Education
Emerge Education invest in companies building tr...
51 investments in 48 companies

Learn Capital
LearnCapital is a venture capital firm focused excl...
42 investments in 29 companies

Reach Capital
Reach invest in education such as early-stage tec...
42 investments in 29 companies

Omidyar Network
Omidyar Network is a philanthropic investment fir...
34 investments in 24 companies

Owl Ventures
Owl Ventures is a venture capital fund that invest...
43 investments in 30 companies

TAL Education (NYSE:TAL)
Tomorrow Advancing Life (NYSE: TAL) is a leadin...
43 investments in 35 companies

500 Startups
500 Startups is a venture capital firm on a missio...
42 investments in 38 companies

SOSV
SOSV invests substantial effort in social innovatio...
29 investments in 18 companies

Tencent Holdings
Tencent is a Chinese internet service portal offeri...
28 investments in 21 companies

New Oriental Education & Technology...
New Oriental Education & Technology Group prov...
27 investments in 24 companies

IDG Capital
IDG Capital is an investment firm that funds early...
19 investments in 12 companies

Bessemer Venture Partners
Bessemer Venture Partners manages more than $...
18 investments in 11 companies

Felicis Ventures
Felicis Ventures is a boutique VC firm that backs i...
18 investments in 13 companies

GGV Capital
GGV Capital is a venture capital firm that partners...
24 investments in 16 companies

Index Ventures
Index Ventures is a multi-stage international vent...
23 investments in 17 companies

Union Square Ventures
Union Square Ventures is a venture capital firm fo...
23 investments in 9 companies

Global Founders Capital
GFC is a globally oriented, stage agnostic venture...
18 investments in 14 companies

Qiming Venture Partners
Qiming Venture Partners is a China-based ventur...
18 investments in 12 companies

Techstars
Techstars is the worldwide network that helps ent...
18 investments in 16 companies

Bisk Ventures
Bisk Ventures is a strategic venture capital firm fo...
22 investments in 18 companies

HV Holtzbrinck Ventures
HV Holtzbrinck Ventures is a Munich- and Berlin-...
21 investments in 8 companies

Kapor Capital
Kapor Capital invests in seed and early stage star...
21 investments in 16 companies

New Enterprise Associates
New Enterprise Associates, Inc. (NEA) is a global ...
17 investments in 8 companies

Tiger Global Management
Tiger Global Management, LLC is an investment fi...
17 investments in 12 companies

Accel
Accel is an early and growth-stage venture capita...
16 investments in 12 companies

Kleiner Perkins Caufield & Byers
Kleiner Perkins is an American venture capital fir...
20 investments in 14 companies

Nesta
Nesta is an innovation foundation headquartered ...
20 investments in 12 companies

Salesforce Ventures
Salesforce Ventures invests in the next gen of ent...
20 investments in 18 companies

Sequoia Capital India
Sequoia Capital India helps founders across India ...
20 investments in 14 companies

Sinovation Ventures
Sinovation Ventures is a full-services venture cap...
20 investments in 11 companies

University Ventures
University Ventures portfolio companies are maki...
20 investments in 13 companies

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Global EdTech Unicorn Evolution

Regional Market Maps

Iceland   Sweden   Finland   Russia

Norway

Denmark

Ireland   Belarus

France   Ukraine   Kazakhstan   Mongolia

Spain   Turkey   Kyrgyzstan   China   Japan

Greece   Syria   Turkmenistan

North Atlantic Ocean   Tunisia   Iran   Afghanistan

Canada   Morocco   Libya   Egypt   Saudi Arabia   Pakistan   Nepal   Laos

United States   Algeria   Oman   India   Bangladesh   Vietnam

Mexico   Mauritania   Mali   Niger   Chad   Yemen   Sri Lanka   Philippines

Cuba   Senegal   Nigeria   Sudan   Maldives   Malaysia

Venezuela   Cameroon   South Sudan   Somalia   Indonesia   Papua New Guinea

Colombia   Democratic Republic of the Congo   Kenya

Ecuador   Tanzania

Peru   Brazil   Angola   Zambia   Madagascar   Indian Ocean   Australia

Bolivia   Botswana

Paraguay   South Atlantic Ocean   South Africa

Chile   Uruguay

Argentina   New Zealand

North Pacific Ocean

Search...   ⬆S
Feedback...   ⬆F

🏠 DASHBOARD
📇 INTELLIGENCE UNIT
📊 INSIGHTS STUDIO   ⬆X

📑 SCORING   1.2K
📊 MARKET SIZING   687
🪙 PREDICTIONS   1.9K
📑 ISSUE MAPS
📚 ECOSYSTEMS β   1.1K

🎗 OPM PROGRAMS   9.3K
🎗 MOOC COURSES   15.5K

🚩 MARKETS   472
⚗ CLUSTERS   582
🏷 COMPS β
🏷 TAGS
🟢 SHORTLISTS
👁 FOLLOWING

✦ DEVELOPMENTS   876
🏢 ORGANIZATIONS   71.4K
👥 PEOPLE β   46.8K
📘 DEALS   20.0K
➖ EVENTS   1.6K

✦ SOURCES   384.3K

New York

United States · North America

Overview

👥 Intelligence Unit ▾

👤 patrick@holoniq.com

🔍 Search... ⇧S

🕐 Feedback... ⇧F

🏠 DASHBOARD

📑 INTELLIGENCE UNIT

📊 INSIGHTS STUDIO ⇧X

📋 SCORING 1.2K

📏 MARKET SIZING 687

🪙 PREDICTIONS 1.9K

📑 ISSUE MAPS

📊 ECOSYSTEMS β 1.1K

➖ OPM PROGRAMS 9.3K

📑 MOOC COURSES 15.5K

🚩 MARKETS 472

⚗️ CLUSTERS 582

📋 COMPS β

🏷️ TAGS

📑 SHORTLISTS

👁️ FOLLOWING

✦ DEVELOPMENTS 876

🏢 ORGANIZATIONS 71.4K

👤 PEOPLE β 46.8K

📑 DEALS 20.0K

➖ EVENTS 1.6K

SOURCES 384.3K

Bangalore

India · South Asia

Overview

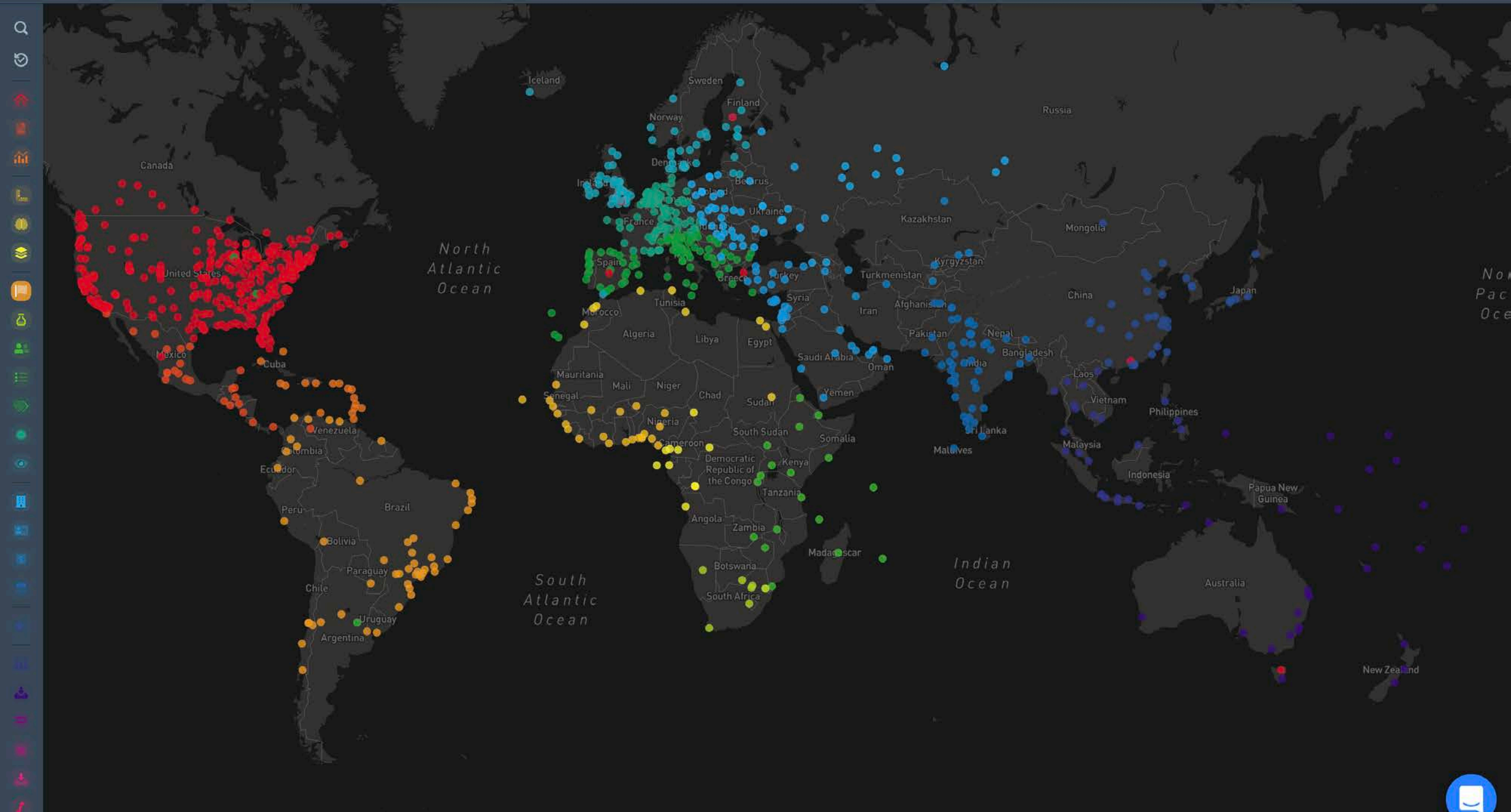Search...   ⬆S

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ISSUE MAPS

ECOSYSTEMS β   1.1K

OPM PROGRAMS   9.3K

MOOC COURSES   15.5K

MARKETS   472

CLUSTERS   582

COMPS β

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SHORTLISTS

FOLLOWING

DEVELOPMENTS   876
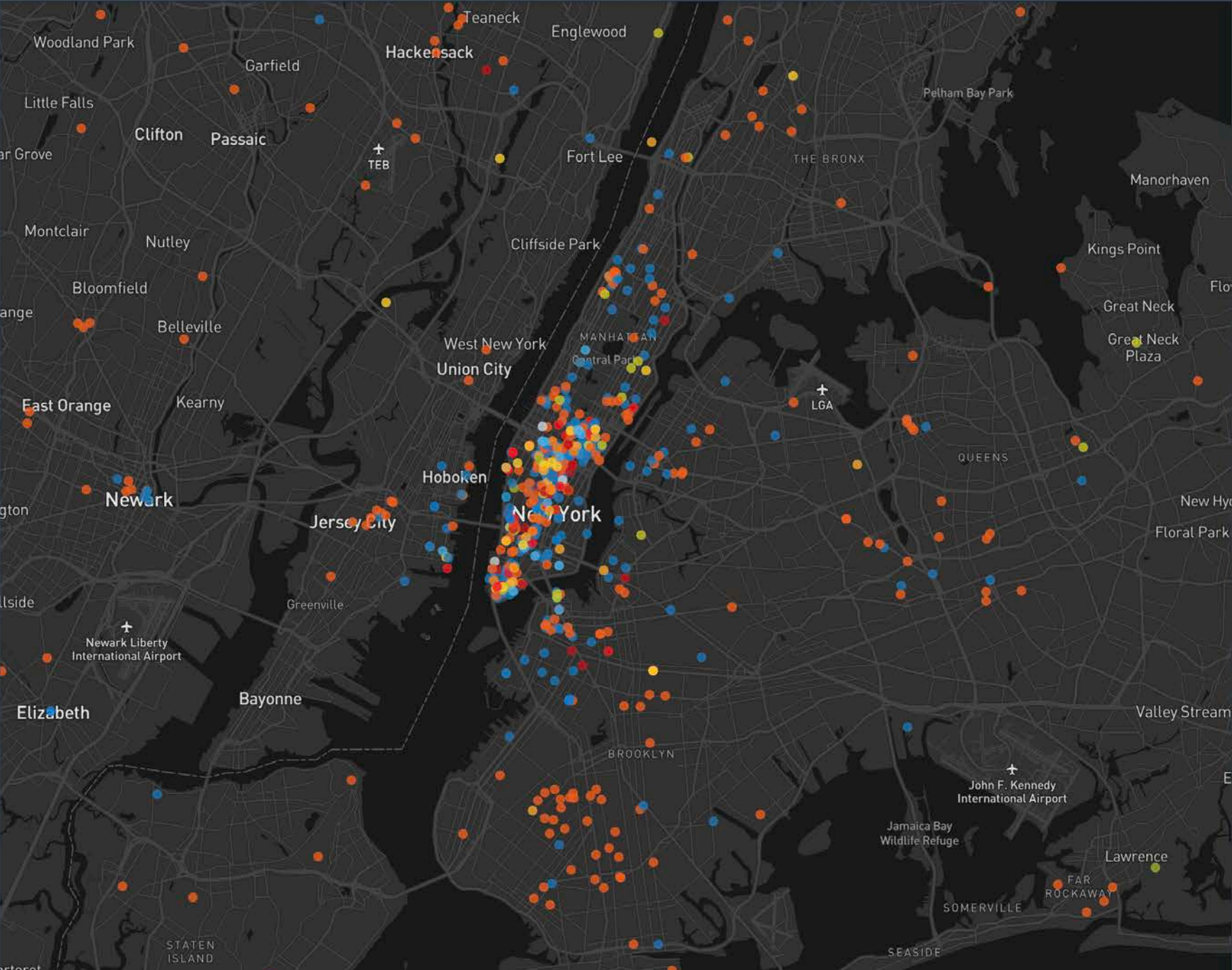
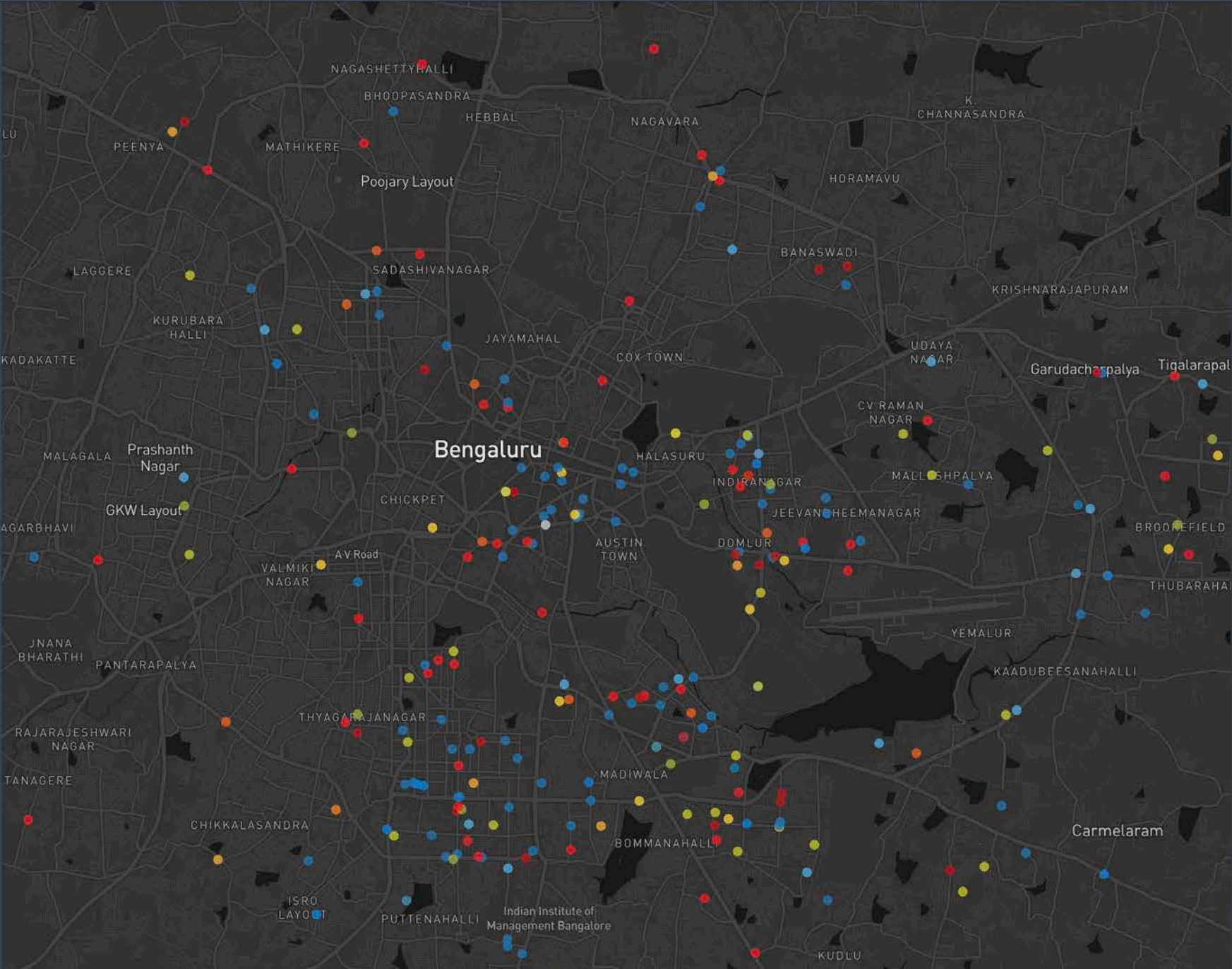ORGANIZATIONS   71.4K

PEOPLE β   46.8K

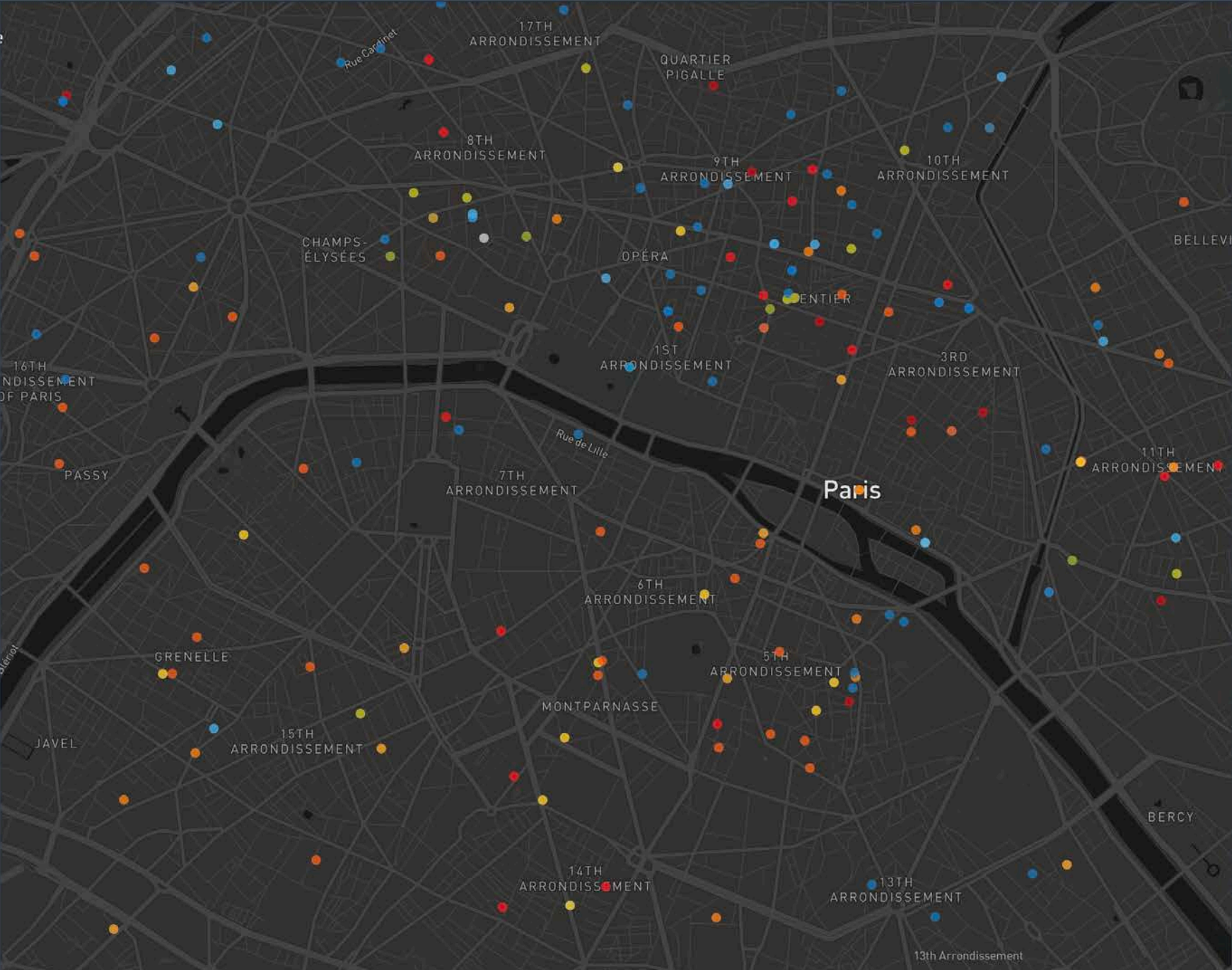DEALS   20.0K

EVENTS   1.6K

SOURCES   384.3K

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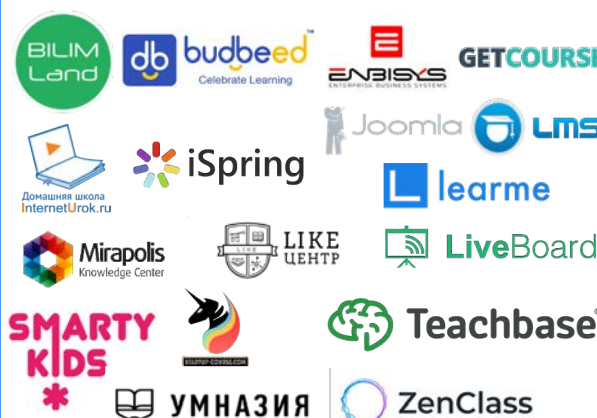
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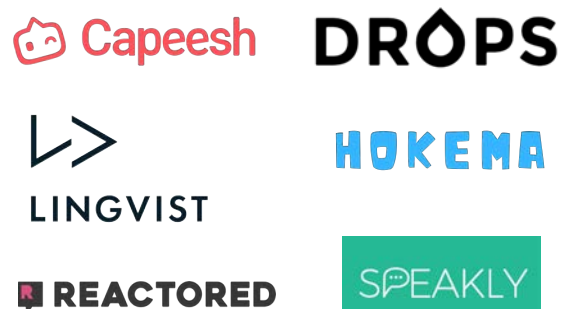
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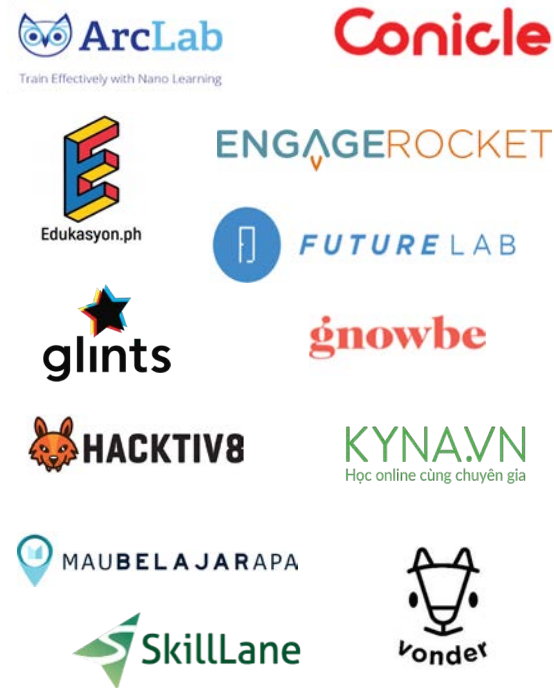
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Trends and Scenarios

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Education in 2030. Five Scenarios

Regional Rising

Education Giants

Regional Collaboration

Global Giants

Industry Giants

Regional Credentialing

Access and Equity

Tech Giants

Hybrid

Social Platforms

Education-as-Usual

OER

Peer Learning

MOOCs

Peer to Peer

Blockchain

Digital Assistants

Smart Classrooms

Artificial Intelligence

Personalized Learning

Robo Revolution
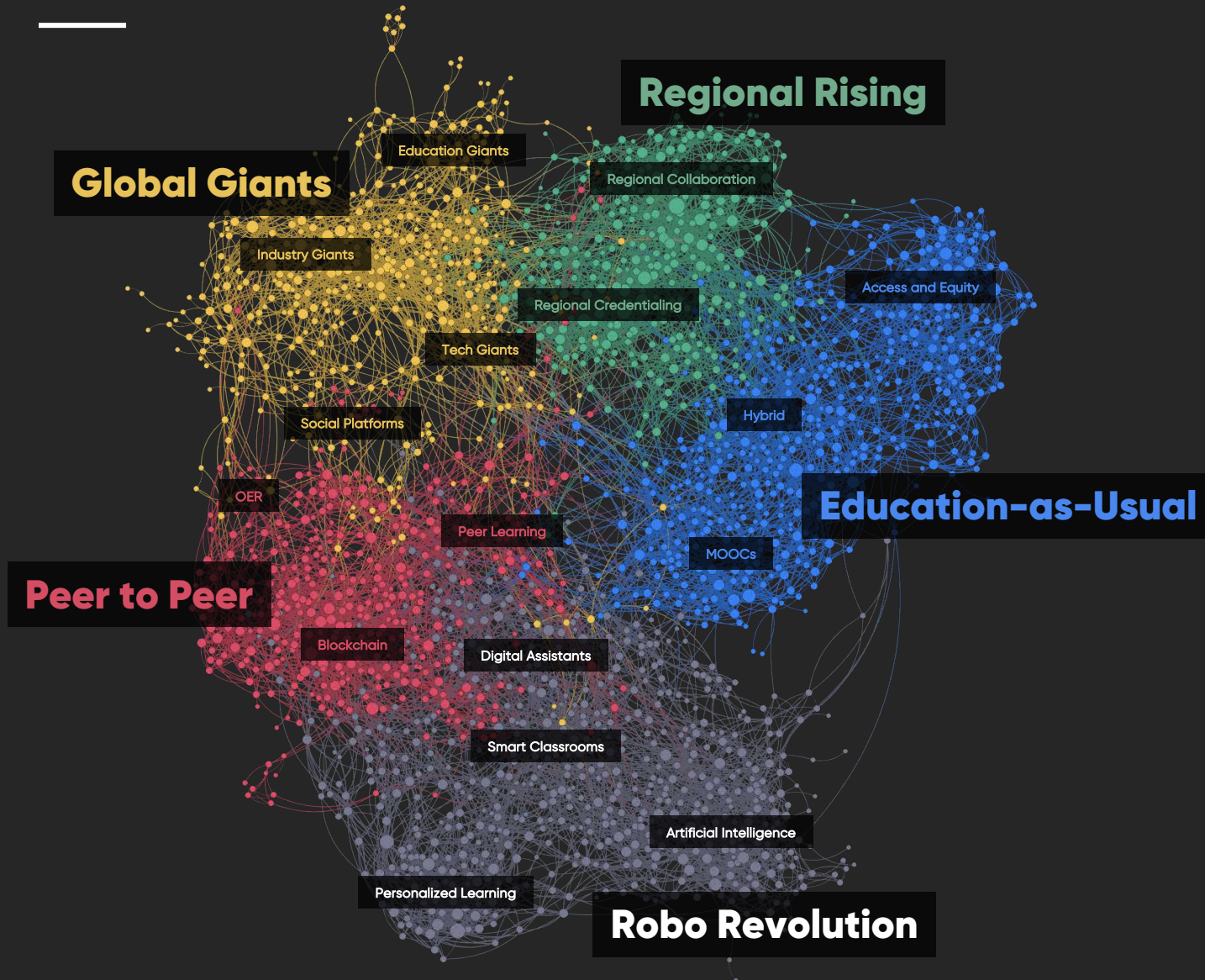
Education-as-Usual
Traditional education institutions remain the trusted source of learning and the most effective vehicle for jobs and prosperity. Higher Education consolidates, global talent platforms emerge and government remains the core source of funding around the world.

Regional Rising
Regional alliances dominate the competitive education landscape, supported by strategic and political cooperation. Cooperative blended delivery and regional talent hubs cross-load labor supply and demand to strengthen regions.

Global Giants
This global free market environment has fostered the emergence of 'mega-organisations' with ubiquitous brand recognition and the scale to achieve significant efficiencies and industry power.
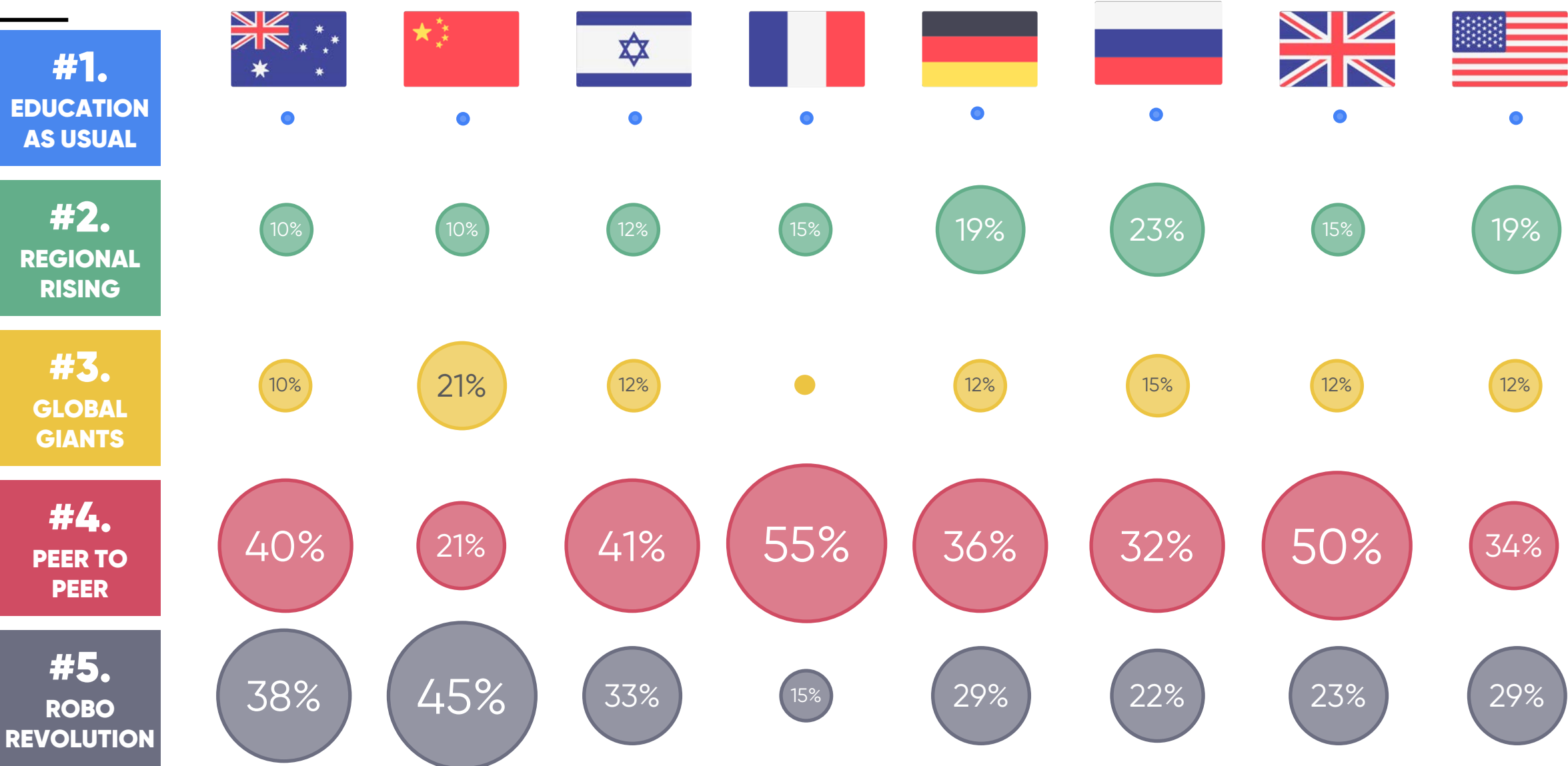
Peer to Peer
Learning online through rich, personalized human to human experiences dominates the post-secondary and skills training sectors. Blockchain technology fundamentally reconfigures credentialing and unlocks the collective creativity and IP of teachers.

Robo Revolution
AI drives a complete reversal in 'who leads learning', with virtual tutors and mentors structuring learning paths, providing assessment tasks, giving feedback, adjusting according to progress and organizing human tutoring when needed.

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Global Scenario 'Preferences'

	🇦🇺 Australia	🇨🇳 China	🇮🇱 Israel	🇫🇷 France	🇩🇪 Germany	🇷🇺 Russia	🇬🇧 UK	🇺🇸 USA
#1. EDUCATION AS USUAL	•	•	•	•	•	•	•	•
#2. REGIONAL RISING	10%	10%	12%	15%	19%	23%	15%	19%
#3. GLOBAL GIANTS	10%	21%	12%	•	12%	15%	12%	12%
#4. PEER TO PEER	40%	21%	41%	55%	36%	32%	50%	34%
#5. ROBO REVOLUTION	38%	45%	33%	15%	29%	22%	23%	29%

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Global Education. Innovation, Investment & Technology

Patrick Brothers, Co-CEO HolonIQ

December 2020

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