



mEducation



# The GSMA mEducation project and the market opportunity

Jill Attewell, GSMA

- What is mEducation
- The mEducation Market Opportunity
- The GSMA mEducation Project
- Evaluating mEducation trials and services

- **What is mEducation**
- The mEducation Market Opportunity
- The GSMA mEducation Project
- Evaluating mEducation trials and services

..... students using portable devices to access learning materials, information, systems, create and share documents, pictures, videos and audio files and interact with other students, teachers, experts, learning systems, apps and the world around them.

■ ■ ■ mLearning including enhancing teaching & assessment **plus** educational administration and management via mobile technologies.

mEducation includes:

- e-books, online learning materials and systems
- Collaboration
- learner-tutor and peer-to-peer communication
- evidence collection and e-portfolios
- e-assessment
- attendance monitoring
- task planning
- curriculum and device management

# Where does mEducation happen?



## Education Institutions

- Preschool (nursery schools and play groups)
- K-12 (primary and secondary schools)
- Further Education & VET (vocational colleges)
- Higher Education (universities)

## Work Places

- Work place on-the-job training
- Professional qualifications
- Vocational certification

## Informal

- Lifelong learning
- Self directed revision and extra tutoring
- Edutainment



# Overcoming barriers to adoption mEducation



- Functionality, reliability, connectivity and availability of mobile devices 😊
- Availability of learning materials, apps and systems for learning and education 😊
- Outstanding barriers = stakeholder inaction and concerns  
including:  
Educator concerns, Parents concerns, Learner concerns, Employer concerns, Community and Media concerns & Operator concerns

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Educator concerns, Parents concerns, Learner concerns, Employer concerns, Community and Media concerns & **Operator concerns**



# Agenda

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# Addressing operator concerns



1. Exploring the mEducation opportunity research project resulting in report:

**“Transforming learning through mEducation”**



&



2. GSMA mEducation Business Models research  
will report later this year



- Worldwide mEducation market revenue opportunity by 2020 estimated as **US\$ 70 billion**

including:

- **\$38 billion** in mEducation products and services
- **\$32 billion** in mEducation-specific devices
  - \$30 billion business-to-business (B2B)
  - \$2 billion business-to-consumer (B2C)



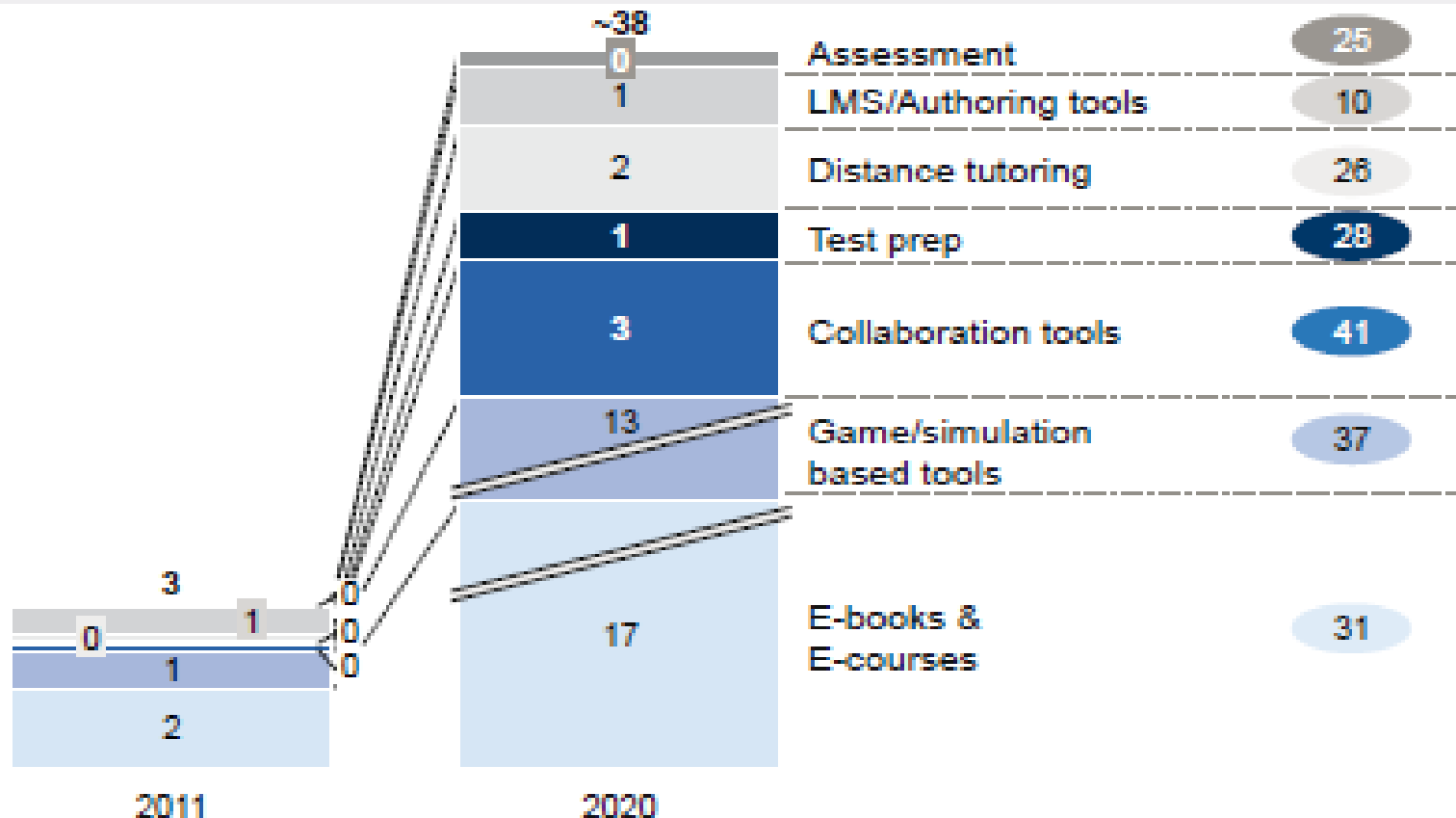
Source: Transforming learning through mEducation (GSMA, McKinsey & Co, 2012)

# mEducation market opportunity by product



**2020 Market by products (excluding device sales)**  
USD billion

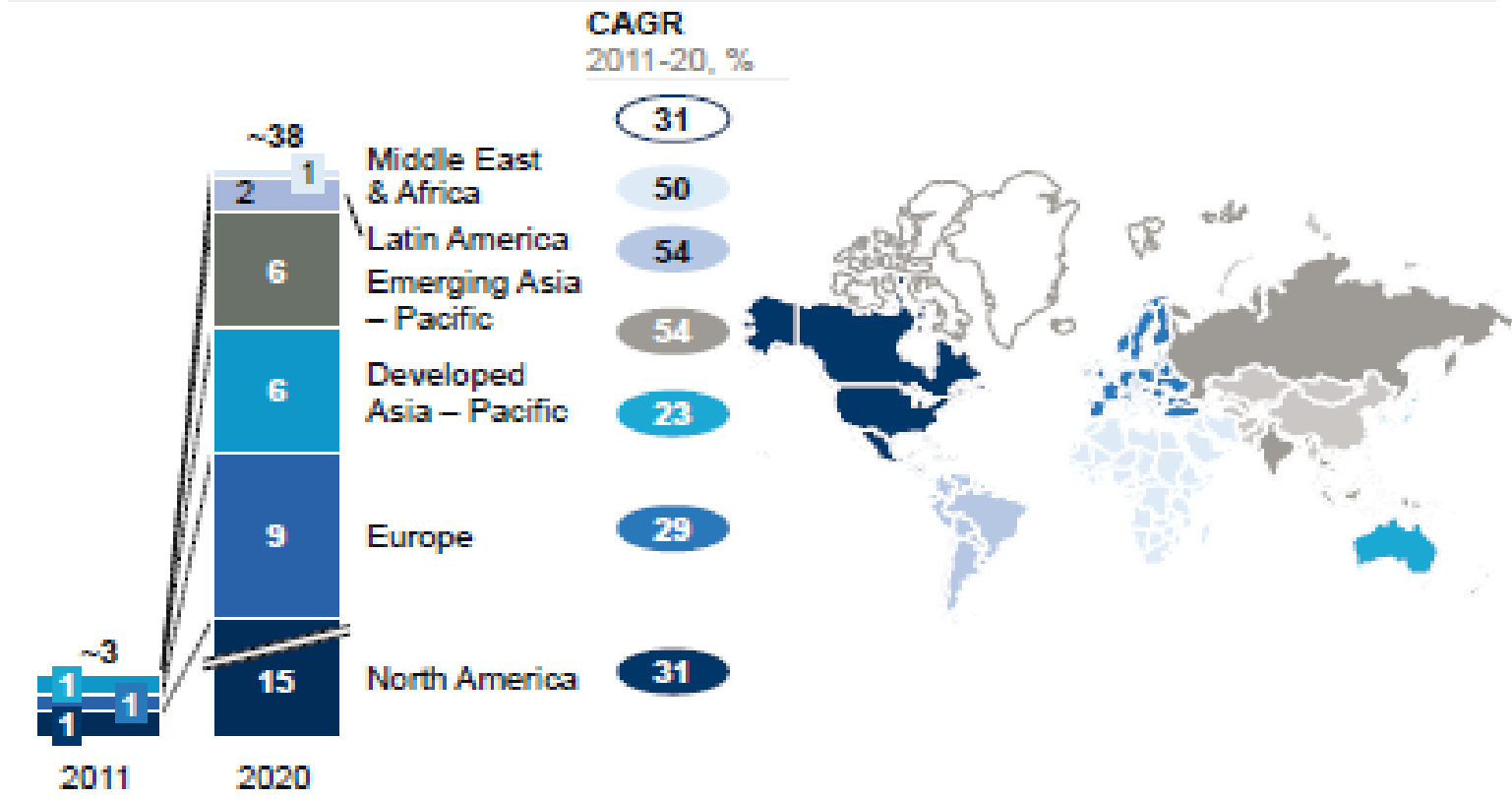
**CAGR**  
Percent



Source: Transforming learning through mEducation (GSMA, McKinsey & Co, 2012)

# mEducation market opportunity by region

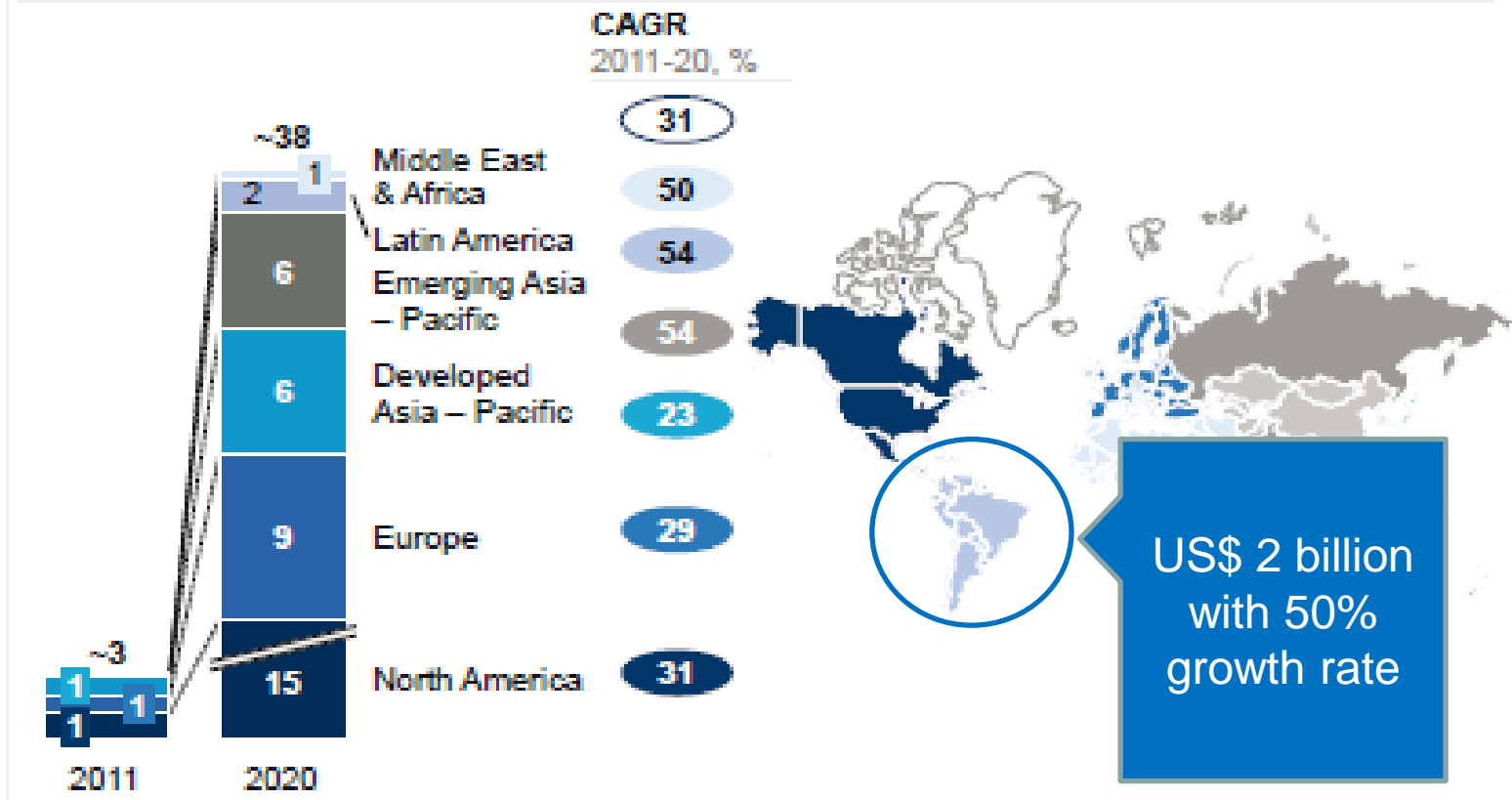
Total mEducation market size (excluding device sales)  
USD billion



Source: Transforming learning through mEducation (GSMA, McKinsey & Co, 2012)

# mEducation market opportunity by region

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# The GSMA mEducation initiative in 2011/12



- Understand **the landscape**, ecosystems and **business opportunity**
- Engagement with educators, publishers and other stakeholders such as local education authorities, governments, teachers groups etc.
- Develop and promote the **Mobile Proposition for Education**
- Publish guidance on **Safeguarding, Security and Privacy**
- Promote the effectiveness of mEducation
- Identify potential partners for **collaborative trials/services**
- Develop draft **Evaluation Framework** to assist evaluating trials/services



# Understanding the mEducation landscape and business opportunity



- Joint market sizing report with McKinsey & Co
- Global mEducation Landscape Report
- Country Deep Dives: US, UK, Spain, Japan, France



**Mobile Education Landscape Report**

This report describes emerging trends, key players and current initiatives in the emerging global Mobile Education and related e-Textbook Publishing markets.

**Education Systems – A Brief Introduction**

This is a reference report, giving a high level description of how education systems work. It serves as a background primer to a series of country reports on Mobile Education covering the United States, the United Kingdom, Japan, Spain and France.

**Mobile Education in the United Kingdom**

This report on Mobile Education in the UK is one of a series of reports which collectively describe the emerging market level, as well as the United States.

**Mobile Education in France**

This report on Mobile Education in France is one of a series of reports which collectively describe the emerging market for Mobile Education. At a country level, as well as this report on France, there are reports on the United States, the United Kingdom, Spain and Japan.

**Mobile Education in Spain**

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**Mobile Education in Japan**

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# The Mobile Proposition for Education



GSMA  
Mobile  
Education

## The Mobile Proposition for Education

Describing key educational scenarios where the use of mobile-enabled handheld technologies can deliver significant benefits and the assets and expertise the mobile ecosystem can offer the education sector.

## Six Key Scenarios + mEducation in the Classroom



Vocational  
education and  
training



Consistent  
connectivity for  
children



Out of classroom  
education and  
collaboration



Professional  
learning and  
development



Literacy skills



Supporting  
students  
with learning  
difficulties  
and disabilities

# mEducation project workstreams 2012/2013



## 1. Stimulate mEducation services

Stimulate mEducation trials and commercial launches, and provide evidence of the benefits of mEducation to induce cultural change and accelerate adoption.

## 2. Experience sharing & guidelines

Develop case studies to facilitate experience sharing and develop guidelines on areas of focus or concern (e.g. business models).

## 3. Promote cross-ecosystem dialogue & operator role

Establish cross-ecosystem dialogue to promulgate the benefits of mEducation, create business opportunities and promote the role of the operator.

**An holistic approach to accelerating the adoption of mEducation solutions.**

## **Our key goal for 2012/13 is to stimulate live trials and services**

- Stimulate mEducation trials involving mobile operators, education providers, publishers, apps developers and other stakeholders
- Gather evidence to understand the effectiveness and impacts of mEducation
- Identify and promote the benefits of mEducation

**The GSMA is launching the mEducation Evaluation Framework providing guidance and tools to assist partners to evaluate their mEducation trials and services**



mEducation



# The GSMA Evaluation Framework

# Why the GSMA Evaluation Framework?



To assist:

- Operators
- Educators
- Publishers
- Companies
- and other partners

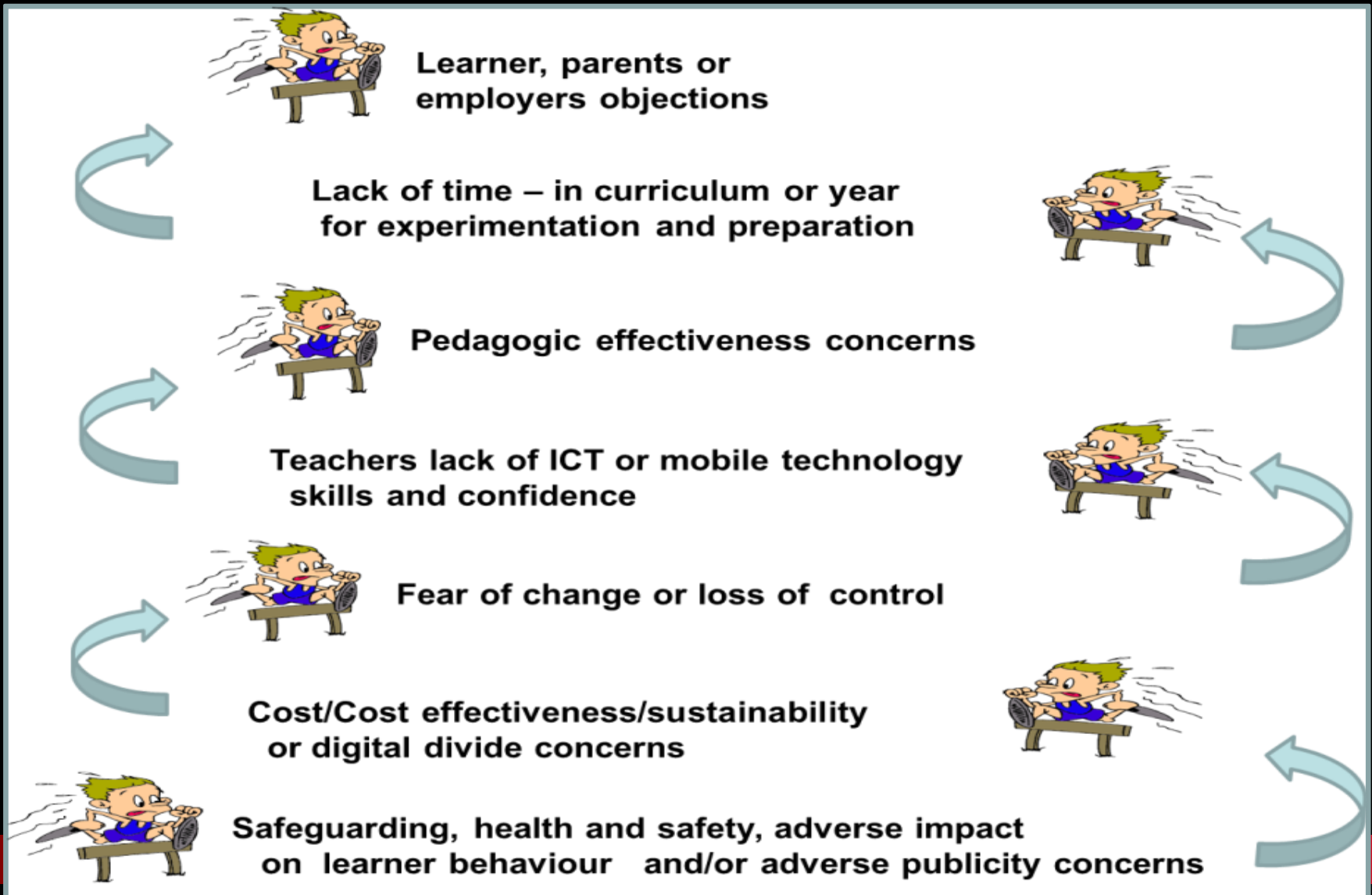
to plan and carry out evaluations

# Why Evaluate mEducation trials and services?

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- To gauge **effectiveness**, **efficiency** and **impact** of mEducation products, services and approaches
- To **inform development** of new products, services, systems, applications and pedagogy
- To inform development of **business models**
- To identify **good practice** for sharing with other practitioners
- To add to the **evidence** base:
  - to support the promotion and adoption of mEducation
  - to help to **overcome barriers** to adoption

# School stakeholder concerns barriers to overcome





# What is evaluation?



- “The process of judging something's quality, importance, or value” (dictionary definition)
- “Assessing the strengths and weaknesses of programs, policies, personnel, products, and organizations to improve their effectiveness”

and

“Evaluation is the systematic collection and analysis of data needed to make decisions, a process in which most well-run programs engage from the outset.”

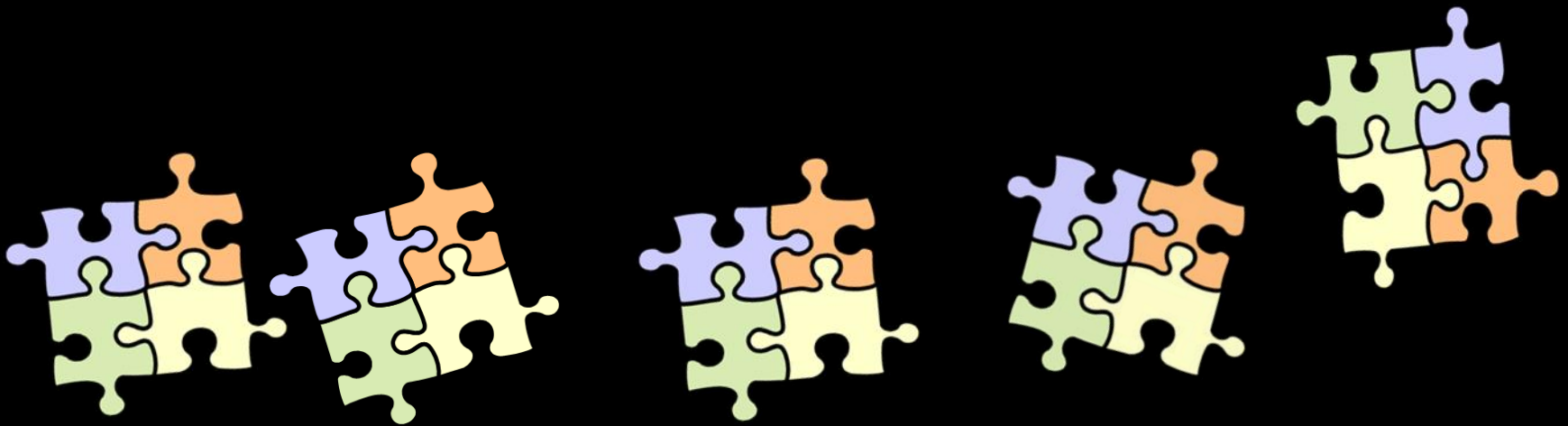
(American Evaluation Association )

# Asking the important questions



# When?

- Evaluation should be more than just “happy sheets”
- When will data be available? when should you collect?
- If you do not build evaluation in at the beginning, at the end you may not have all the pieces of the data you need to draw conclusions and make decisions



- **There is no ‘best’ method - except the best for your needs, context and resources**
- **Scientific**  
more quantitative, experimental, tests hypotheses, yes and no answers
- **Social scientific**  
more qualitative, observations explores, explains, predicts
- **Mixed methods**

*It has been observed that “combining quantitative and qualitative methods in a single study can help elucidate various aspects of the phenomenon under investigation, providing a more holistic understanding of it and resulting in better-informed education policies.*

*This is particularly true when studying complex social phenomena, such as the attitudes and behavioural reactions of teachers when confronted with an educational reform.”*

**Giannakaki M S, 2003**

# Evaluation

# Data Collection

**PRACTITIONER-  
LED  
ACTION  
RESEARCH**  
data  
and findings

**TEACHER**  
interviews, focus  
groups, surveys,  
diaries, blogs,  
forums, videos,  
lesson observation  
reports and scores

**LEARNER**  
Interviews, focus  
groups, surveys,  
SMS surveys,  
Diaries, blogs, video  
diaries, twitter  
Facebook,

**PARENTS AND  
EMPLOYERS**  
surveys, interviews,  
focus groups,  
forums, policies,  
strategic plans

**PROJECT  
MANAGEMENT**  
pilot/launch and  
evaluation aims,  
objectives,  
project plan,  
progress reports.

**SOCIO-  
DEMOGRAPHIC  
CONTEXT**  
free school meals  
data, learners  
postcode  
analysis

**MANAGEMENT  
Administrative  
and IT  
Departments**  
interviews, forums,  
strategic  
plans, policies

**PILOT/LAUNCH**  
number/types of  
partners, learners,  
subjects, levels,  
learning contexts,  
technologies

**ATTENDANCE  
RETENTION &  
ACHIEVEMENT**  
institution records and  
estimates,  
published data,  
previous years data

**INSTITUTION  
IMPACT**  
Inspectorate  
reports and  
scores, distance  
travelled surveys

# The GSMA Evaluation Framework



- Part 1

An introduction to evaluation and to selecting an appropriate overall approach as well as research methods

- Part 2

Describes a practical and systematic approach to carrying out evaluation

- Part 3

Forms and checklists for planning and carrying out evaluation

# GSMA can Advise and Assist

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The mEducation team can provide:

- Help with Evaluation Planning
- Training and Mentoring for practitioner evaluators
- Assistance with monitoring and problem solving
- Advice on Data analysis
- Advice on Interpreting and presenting findings
- Assistance with disseminating findings (if appropriate)



# Brokering Relationships & Stimulating Trials



GSMA is actively seeking Operators and Educators and other potential partners:

- With innovative ideas about how mobile technologies can be used in Education
- Interested in pursuing a trial, or launching a service, in partnership with a educators or a mobile operator in their country
- Developing a product or service with benefits for education and for the operator and extending the role of the operator beyond providing connectivity



# mEducation project contacts

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Thank you

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