



mEducation



## The GSMA mEducation Project

Enhancing learning and teaching through the use of mobile technologies

■ ■ ■ ■ ■ takes place when students use portable devices to access learning materials, information and 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.

■ ■ ■ is an extension of mLearning to include the enhancement of teaching, assessment and educational administration and management in addition to learning, all via mobile technologies.

mEducation includes:

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

# Where does mEducation happen?

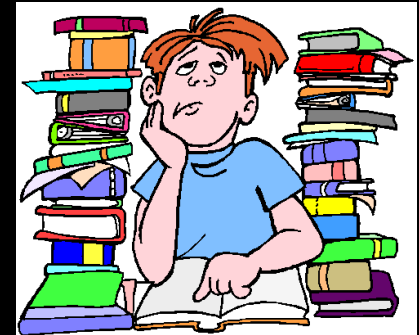


## Education Institutions

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

## Work Places

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



## Informal

- Lifelong learning
- Self directed revision for key assessments
- Edutainment

# The mEducation opportunity



## Five trends shaping the mEducation market:

- Portable device form factors are rapidly evolving
- Emergence of the technology generation
- Governments warming up to the potential of mEducation
- Growing success of mobile apps as a medium for educational content
- Pilots leading to viable business models



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

# The mEducation market revenue opportunity will be USD \$70 billion by 2020

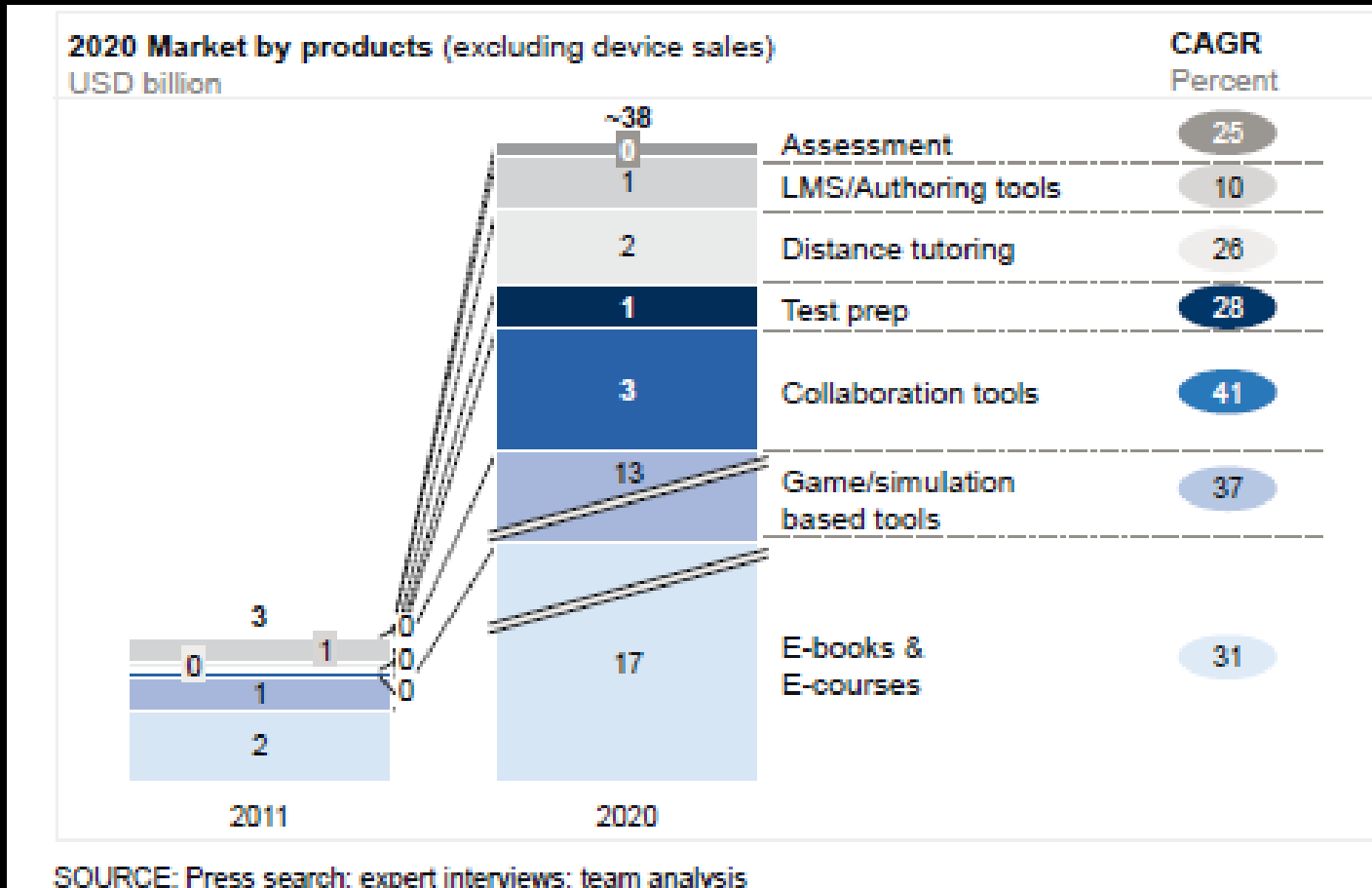


- **\$38 billion** in mEducation products and services
- **\$32 billion** in mEducation-specific devices
  - \$30 billion B2B
  - \$2 billion B2C



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

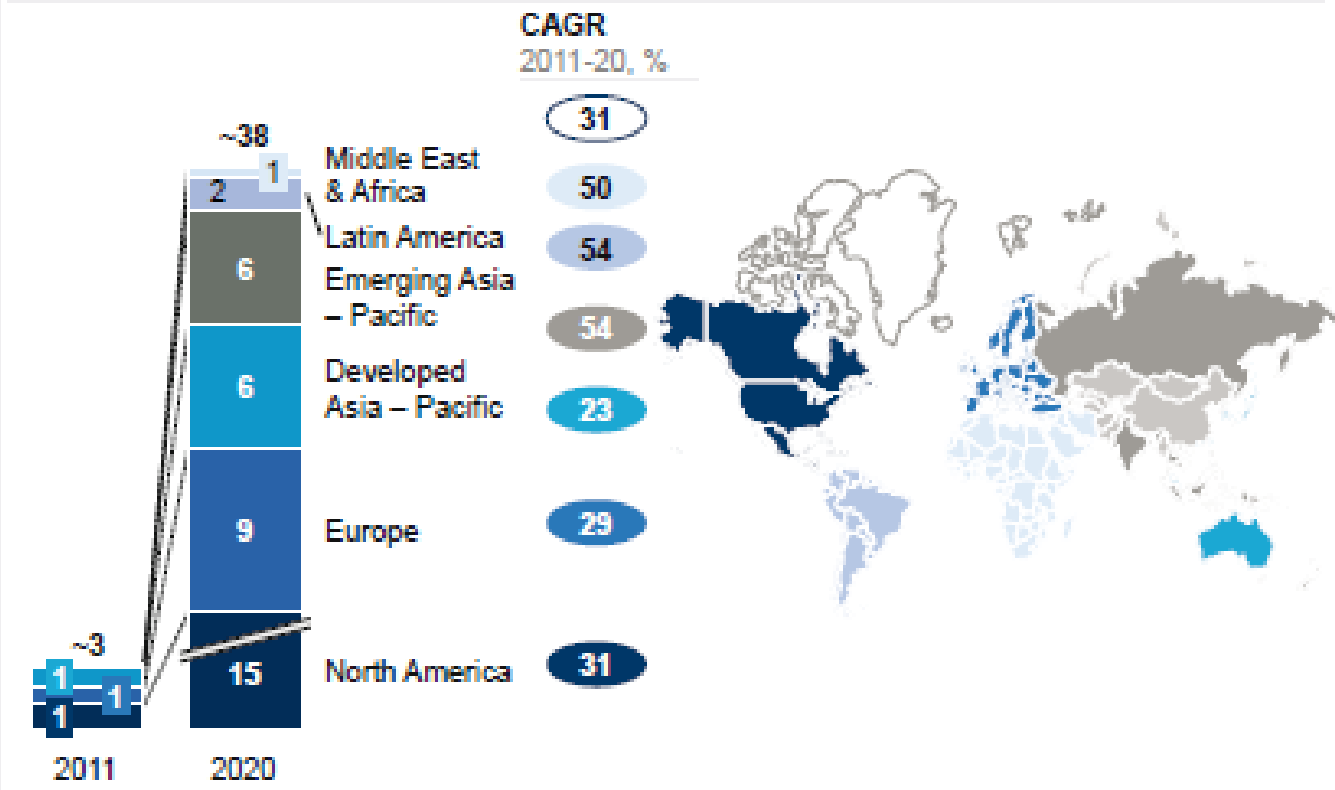
# mEducation market opportunity by product



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

# mEducation market opportunity by region

Total mEducation market size (excluding device sales)  
USD billion



SOURCE: Team analysis

# Purpose and objectives of the GSMA mEducation initiative

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- **Understand the landscape, ecosystems and business opportunity** in different educational sectors
- **Engagement and support** of publishers and other stakeholders such as local education authorities, governments, teachers groups etc.
- Develop and promote the **‘Mobile Proposition’** for education
- Identify **appropriate business models** for mEducation
- Prove the **effectiveness of delivery** of education content over mobile networks
- Ensure that the **mobile community has a significant role** in the mEducation market

# Understanding the mEducation landscape and 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**

This report on Mobile Education in Spain 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 Spain, there are reports on the United States, the United Kingdom, Japan and France.

**Mobile Education in Japan**

This report on Mobile Education in Japan 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 Japan, there are reports on the United States, the United Kingdom, Spain and France.

**Mobile Education in the United States**

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# The Mobile Proposition for 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



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

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

- Stimulate mEducation trials involving mobile operators, education providers, 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 and can provide guidance and tools to assist trial partners to evaluate their mEducation services.**

# Brokering Relationships & Stimulating Trials



GSMA is actively seeking Mobile and Education sector organisation participants:

- With interest or innovative ideas about how **mobile technologies** can be used in Education
- Interested in pursuing a trial in partnership with an education organisation or mobile operator in their country
  - Developing a **product or service mutually beneficial to education and to the operator preferably** extending the role of operator beyond simply providing connectivity

# Other key mEducation activities



- Case studies and knowledge sharing
- Stakeholder engagement e.g. Governments, industry stakeholders
- Participation in key Mobile and Education sector events

**We are glad you could attend the Asia Regional Summit and look forward to working with you on mEducation!**

**All our project deliverables can be found at: [www.gsma.com/meducation](http://www.gsma.com/meducation)**

# Key contacts

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Thank you!

[www.gsma.com/meducation](http://www.gsma.com/meducation)