



DIGITAL TRANSFORMATION
IN HIGHER EDUCATION

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ABOUT THIS REPORT

In July 2017, Navitas Ventures conducted an exploratory study to gather a range of perspectives on digital transformation in higher education.

The study's participants represent groups who are central to digital transformation in higher education, as leaders and facilitators of change and as those who will be affected by digital transformation. They were drawn from a diverse group of stakeholders, including:

- 26 leaders from Navitas partner universities in Australia, the USA, Canada and the UK.
- 100 students and recent graduates of universities in Europe, North America, Africa, Asia and Australia – countries where Navitas has operations.
- 42 founders and leaders of education startups in Australia, the USA, UK, Asia and Israel. These startups represent early, mid and late stage businesses from across the edtech ecosystem.

We conducted a series of surveys and interviews to gather perspectives on:

- The perceived purpose, outcomes and approaches to digital transformation in universities
- Progress towards digital transformation goals
- Likely impact of emerging technologies on digital transformation
- Expected timeframes related to digital disruption in higher education

The purpose of this initial study was to better understand the perspectives of these diverse groups, to gather their digital transformation views and experiences, and to identify any emerging common themes as well as key differences.

It's the first time this range of perspectives has been captured within the higher education sector, and the findings may better facilitate connections and knowledge sharing, while also informing further research on digital transformation practices in higher education.

About Navitas Ventures

Navitas Ventures is the education venturing arm of Navitas, one of the world's leading education providers. For over 25 years, Navitas has prepared students around the world to be study-ready, work-ready and world-ready through trusted university partnerships and specialist colleges. Through Navitas Ventures, it is also investing in and incubating promising new ideas that will shape the future of education. Navitas Ventures' mission is accelerating innovation in education globally.

WELCOME

It is our great pleasure to share this snapshot study of the way universities around the world are preparing to transform and prosper in the Fourth Industrial Revolution.

We know university leadership teams, policy makers, and higher education entrepreneurs are all navigating the choppy – and at times ambiguous – waters of digitisation. This research study is for them - and also for those working at the coal face, driving digitally-enabled innovation in their organisation.

According to the World Economic Forum, the first industrial revolution used water and steam power to mechanise production. The second used electric power to create mass production, while the third used electronics and information technology to automate production. A Fourth Industrial Revolution is now building momentum, characterised by a fusion of technologies that blur the lines between the physical, digital, and biological spheres.

What role will higher education play in the next phase of this revolution, and consequently how should higher education leaders prepare their institutions for the changes ahead?

Traditional higher education, as a testbed for innovation, has played its role in this digital revolution. However, universities also need to provide learners with the skills and knowledge they need for a very different future.

The university leaders, edtech entrepreneurs and students interviewed for this study believe transformation in higher education is essential. They are both optimistic and honest about the challenges ahead. Vice chancellors and presidents, anticipating a future with reduced public financial support, understand that it is no longer an option to keep doing things the old way; innovation is now prerequisite for survival.

We'd like to thank the leaders and students who provided their feedback and insights to make this research

possible, including vice chancellors and presidents from Navitas university partners, edtech entrepreneurs and university students from around the world.

We hope the results help you take the next step in your own digital transformation journey, and welcome your feedback as we broaden our study to gain greater insights into the changing higher education landscape.



Patrick Brothers
CEO
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EXECUTIVE SUMMARY

There is no doubt that higher education transformation is already underway, with every university leader indicating they are at least part way through their digital journey.

However, university leaders, edtech founders and students have divergent views when it comes to priorities for change, and how imminent disruption of the traditional university model will be.

While current transformation programs appear to be focused on the foundations of the experience (such as administration efficiency and digitised learning content), students are more concerned with their immediate employment prospects on graduation – and edtech founders have already recognised this, and are responding with their own solutions.

Expect disruption within the next decade

Whether they were university leaders, students or edtech founders, at least 50% of respondents expect the traditional university model to be disrupted by 2025. Students and edtech entrepreneurs expect the timeframe to be even shorter, with approximately one in four expecting disruption within the next two to three years. While universities expect disruption to take longer, nine out of 10 university leaders nonetheless expect the university model to have been disrupted by 2030 – when this year's five-year-olds will be starting university.

A shared focus on student experience

In general, there was consensus on the importance of using technology to improve the student experience – such as through digitising content, automating

administrative processes and integrating systems. All of these might be considered 'digital hygiene' factors.

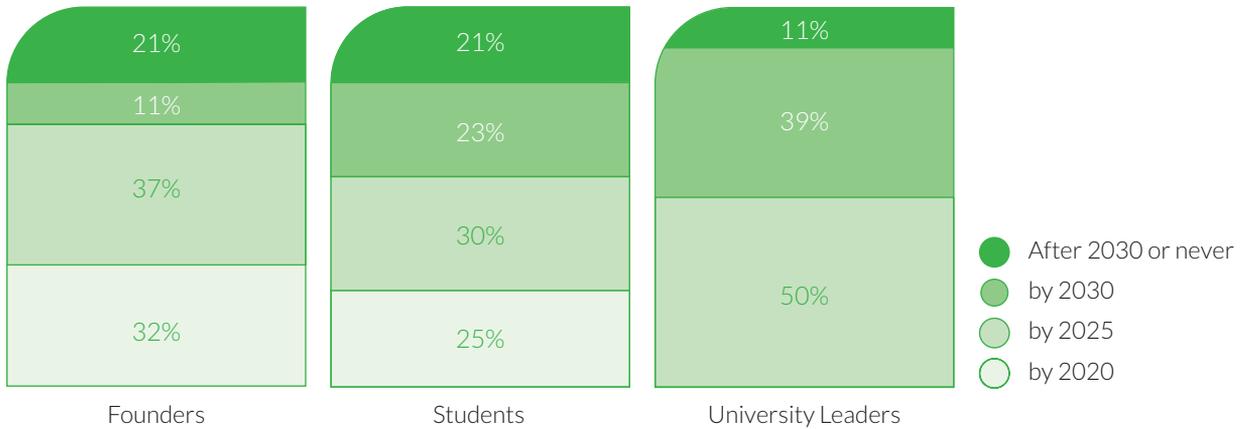
However, there was a striking disparity between university and student priorities when it comes to using technology to support internships and pathways to employment. This is a very high priority for students, but less so for universities. Edtech founders appear quite attuned to this demand – perhaps explaining the momentum that 'learning to work' models have gathered over the past decade.

Across the board, perhaps as expected, edtech founders also place a higher priority on change, particularly in areas where technology can enable better student experience and job outcomes. 68% of founders surveyed reported that universities are not at all, or only marginally effective, in using technology to enhance the student experience. Students were more satisfied with their university's performance, with four-fifths (81%) saying their university is doing this 'somewhat effectively' or 'very effectively'.

Universities aim to improve, rather than replace, the traditional model

University leaders view digital transformation as a way to improve 'how' they do their existing work. Three-quarters plan to partly digitise their current operations while creating new digital models in parallel. Very few aim to create wholly new digital models or fully digitise their current model, suggesting they remain confident in the current university model.

Do you expect the traditional University model to be disrupted and if so, by when?



Similarly, university leaders cited the key outcomes of transformation as ‘improving student experience’ (94%) and ‘meeting changing student needs’ (83%). Initiatives that would improve the current experience, such as course development, enrolment, and administration, were considered more important to digital transformation than initiatives that would change what the university does, such as alternative credentialing.

Transformation is approximately one-third through

Every university that responded to the survey indicated they are undergoing some form of digital transformation, typically led by an operational leader – a vice president, deputy vice chancellor or provost. On average, they estimate they are approximately 20% to 40% of the way through their transformation. These findings suggest that universities are taking the task seriously, neither disregarding the need for transformation nor underestimating the challenges involved.

Students are focused on employment

Students identified innovations and technology that could support internships and pathways to employment to be their highest priority. This was closely followed by the availability of technology enabled administrative processes. While students place extreme importance

on universities as a pathway to employment, two-thirds believe that universities will be either adequate or very effective in fulfilling this role for students over the next decade.

Edtech entrepreneurs see potential for improvement

Edtech companies surveyed are more pessimistic than students in their assessment of universities, with only a fifth indicating that universities do enough or are ‘very effective’ at preparing students for work. This is most pronounced for early-stage startups – edtech companies that identify as ‘mature’ appear to have a more optimistic view of how universities are adapting to change student needs.

AI is considered the most significant emerging technology

When presented with a range of emerging technologies, survey respondents considered AI to be the one with the greatest potential impact on higher education. This was followed by the Internet of Things and virtual/augmented reality, with chatbots and blockchain having less impact.

No technology scored in the bottom half of the scale, which suggests all these technologies are expected to have at least some potential in higher education.

PURPOSE & PRIORITIES

University leaders and edtech founders shared their own priorities for digital transformation – and students their expectations. These insights reveal the underlying objectives for change.

Focus on the student experience

Universities view digital transformation, above all, as a means of improving the student experience with 94% citing this as a key outcome. Investment in digital needs to meet changing student needs, but also support efficiency objectives. Responses from students echo the need to improve some of the 'basics' of their experience, with digitisation of administrative processes, improved 'user experiences' and digital curriculum featuring high on their wishlist. Students called on their universities to adopt an integrated digital approach, and to involve them in technology decisions.

Enhance the core first

When asked about the importance of different initiatives to their digital transformation, university leaders prioritised student experience, course development, enrolment and administration. These are all 'how' they do their existing work - core to their operations. Initiatives that would change 'what' they do, such as creating new digital businesses or alternative credential models, ranked further down the list. Having said that, many universities are trialling new digital models.

Invest in innovation and experimentation

University leaders expressed the view that students needs aren't being met properly. Most used the word 'looking', saying that they're 'looking' at what

others are doing without any clear solutions yet for full transformation. They see themselves as already partly addressing this issue by offering one-off units or moving to fully online offerings and some are actively experimenting across the whole value chain. The majority (78%) describe their approach as 'digitising some elements of the current model, while also creating new digital models.'

Drive growth through digital

One of the top transformation priorities for university leaders was digitising marketing and admissions as a means to drive enrolment growth, with 72% saying this is very important. US universities in particular rated this item as the highest priority in their digital transformation efforts.

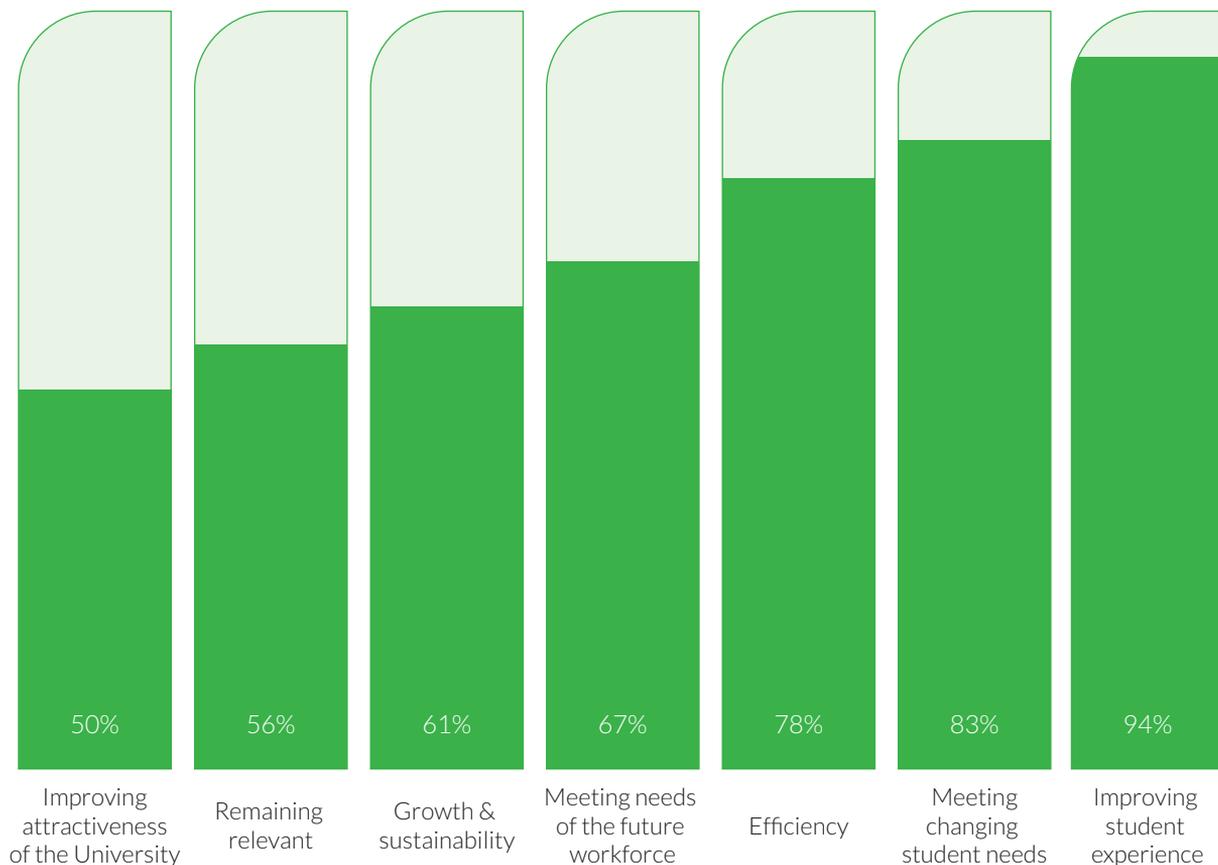
“Make sure to test new technologies with student focus groups and continually ask students for feedback as new technology is adopted”

University Student - North America

“I think probably the biggest challenge is meeting student expectations and ensuring that we deliver an education in the broadest sense of the word that really meets the expectations and needs of the students, but also meets the needs of employers”

Vice Chancellor - UK University

What key outcomes is your digital transformation focused on delivering?



LEADERSHIP & MOMENTUM

The success of any transformation depends on its leadership. In the digital transformation of higher education, vice chancellors and presidents play a more critical role due to the magnitude of change, the degree of disruption and the power of inertia.

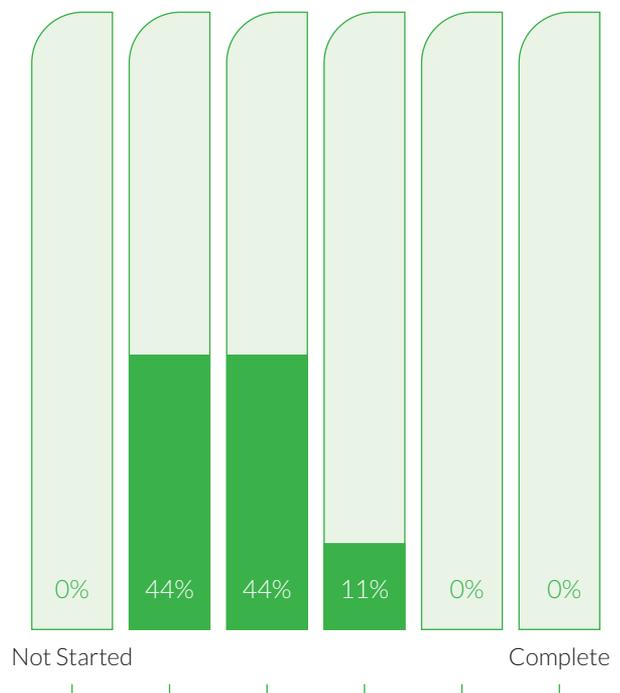
Digital transformation requires new ways of working, not just new technology. The most scarce resource in any organisation is not necessarily technological know-how, but leadership. Today's leaders need to be able to sift through an avalanche of digital initiatives, manage accelerating innovation cycles, and reshape the organisation around new approaches.

In the case of survey respondents, digital transformation is typically led by a senior academic leader, such as deputy vice chancellor, vice president, or provost or a senior digital / technology leader. The most senior leader – vice chancellor, president or CEO – is leading digital transformation in a quarter of cases.

These universities all estimated that they are part way through transformation (while 'not started', '80%', and 'complete' were all options, they did not attract any responses). Arguably, this is a good sign – it suggests that universities are taking the need for transformation seriously and they understand the commitment required.

Australian respondents were more likely to consider themselves ahead of their peers in digital transformation, while UK respondents were more likely to consider themselves average or 'far behind'. Across the board, almost half rated themselves as 'average' in progress, compared with their peers.

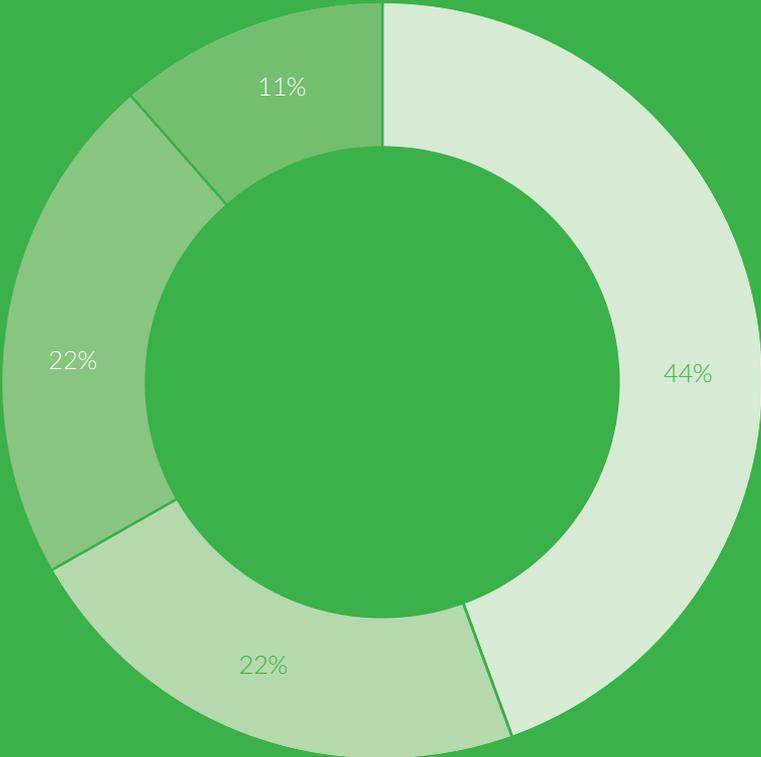
Approximately how far through digital transformation is your institution?



“It’s not going to be as fast as everybody says, it’s not going to be as transformative as everybody says... and justifiably so. I think none of us want our education to be turning on a dime every 5 years... so believe the hype, and don’t believe the hype”

Innovation Leader - Australian University

Who is leading the transformation at your university?



- Deputy Vice Chancellor / Vice President / Provost ●
- Senior Leader e.g. CIO / Head of Digital ●
- Vice Chancellor / President / CEO ●
- Senior Executive Board, Committee or Group convened for this purpose ●

NEW MODELS IN HIGHER EDUCATION

Overall, universities see digital transformation as a way to enhance their current model, rather than change it.

New models have arrived

A number of alternative education models have emerged over the last decade. MOOCs, bootcamps, 'learn now-pay later' education, nanodegrees and alternative credentialing have now cycled through one or more business model changes in their pursuit of sustainability.

Early MOOCs failed to achieve high completion rates, bootcamps have struggled to extend their reach beyond narrow discipline fields, and alternative credentialing is limited to continuing education points. However, as these models continue to evolve into viable solutions – and become increasingly recognised by employers and the market in general – it is likely they will impact universities and other traditional higher education providers.

Although not indicated as a high priority in digital transformation efforts by survey respondents, partnerships between universities and new model providers are already widespread. Traditional providers are partnering, investing, acquiring and embedding new capabilities into their existing operations.

Universities are already partnering with bootcamp providers to deliver the 'best of both worlds' for students, as well as launching their own bootcamp models. Most universities have some sort of MOOC offering, either stand alone or through a MOOC provider. Some are embedding these offerings into their traditional programs and giving credits for completion.

Balanced approach

Most university leaders are opting for a 'middle ground' in terms of changes to the current university model with three-quarters planning to partly digitise their current operations, and at the same time are contemplating the creation of new digital models. While almost all university leaders expect higher education to be disrupted in the next ten to fifteen years, very few are planning to

fundamentally create a new digital model for their university, perhaps indicating a high level of confidence about the place of the traditional university model in a disrupted higher education landscape.

While university leaders are 'looking' at potential models, most currently see technology as something which can provide a quick 'boost' to student engagement and improve the overall learning experience.

Experimenting outside the core

Having said that, 17% of university leaders believe it's very important to launch at least one digital business outside core operations, to experiment with new business models. This approach could help to protect and support breakthrough ideas if there is concern the institution's processes could limit experimentation or implementation.

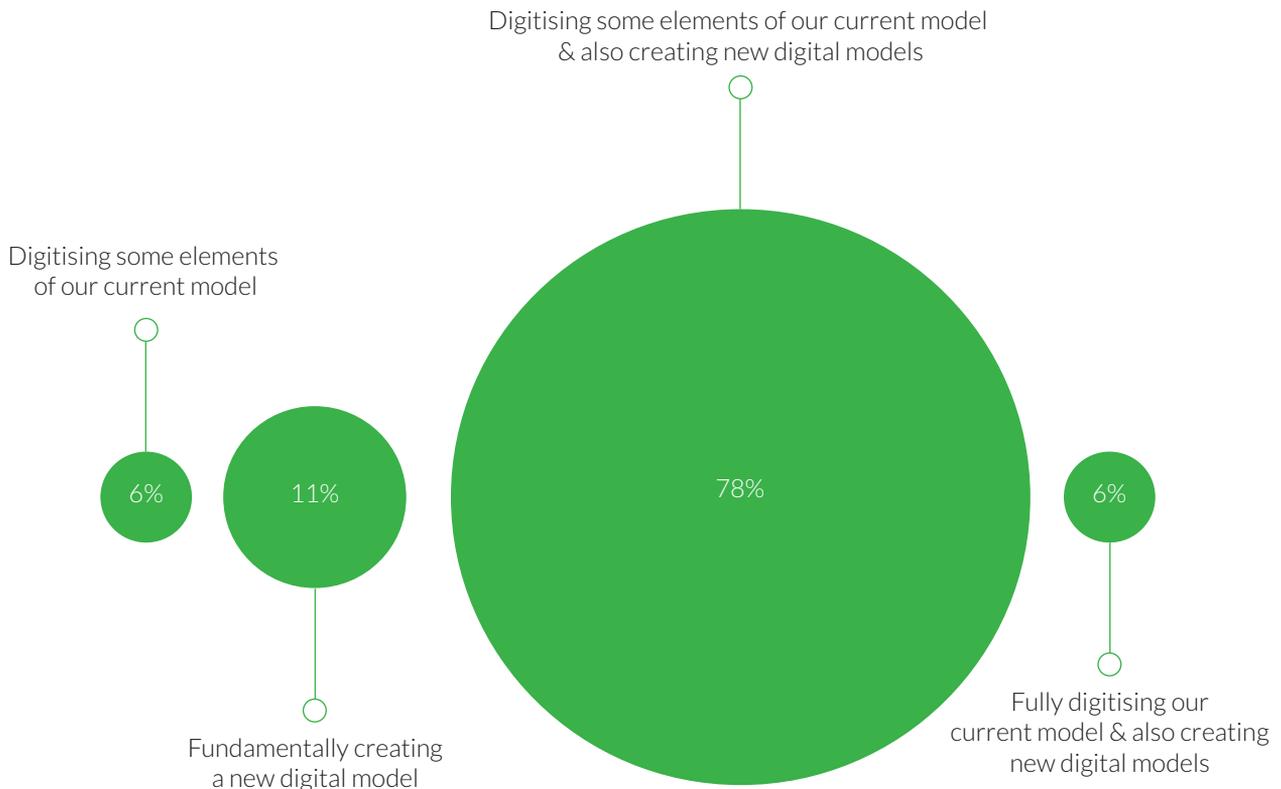
Founders challenge traditional models

Perhaps not surprisingly, edtech founders were more likely to say as a matter of fact that the university model will not service the future needs of educating the world and that it needs to fundamentally change or risk being made redundant. Over two-thirds of edtech founders believe the traditional university model will be disrupted by 2025.

“I’m a convert and a great believer in what universities can do, and the role that universities can play in transforming lives”

Vice Chancellor - UK University

Which option best describes how your University is approaching digital transformation?



“The product itself [universities] is broken”

EdTech Founder - USA

THE STUDENT VOICE

100 learners, 11 countries, 5 continents

Of the 100 university students and recent graduates who completed the survey, 97 reported their country. While the largest contingents came from Western Europe, Australia and India, a total of 11 countries were represented.

Student confidence in the current model

A common theme running through the student responses was that, by and large, they still have confidence in higher education today. This echoes the view of university leaders, who saw a need to improve rather than re-invent themselves.

Help me prepare for work – and get the basics right

Students said innovations that could support internships and pathways to employment are their highest priority. This was closely followed by the availability of technology-enabled administrative processes, to streamline and simplify applications, enrolment, grades and student services. Ranking lowest in priority for students were wholly new models such as online education and micro-credentials. Equally, students weren't so interested in the use of emerging technologies such as simulation, robotics, and immersive classrooms in their university experience.

By and large, these preferences were strikingly consistent between regions, suggesting that students want universities to get the basics right. The exception is Africa, where respondents displayed a much stronger preference for micro-credentials, bootcamps and similar models – a possible area for further investigation.

Universities are doing OK, but digital 'matters' to me

Despite responses indicating that students wanted more technology enabled services, most students were

generally positive when it came to their university's use of technology in their overall experience. University students are certainly thinking about 'digital' when considering where to study with over three-quarters of respondents indicating that the 'digital savviness' of their university was either very important or somewhat important in their decision about where to study.

The skills I need for my future

While students place extreme importance on universities as a pathway to employment, they appear fairly optimistic that universities can effectively fulfill this role over the next decade. Two-thirds of students indicated that universities will be either adequate or very effective in preparing students for the world of work in five to ten years. Not one indicated that universities will be completely ineffective in this regard. There were some differences in responses by geography, with students from Asian universities being particularly optimistic.

The university model will change

One quarter of student respondents expect the disruption of the university model within the next three years and half predict disruption within the next ten. Only 10% believe the university model will never be disrupted. It is worth noting that responses on timing of disruption are strikingly similar between students and edtech founders, compared with the more cautious responses from university leaders. Changes in student sentiment about disruption over time will be interesting to track in future research.

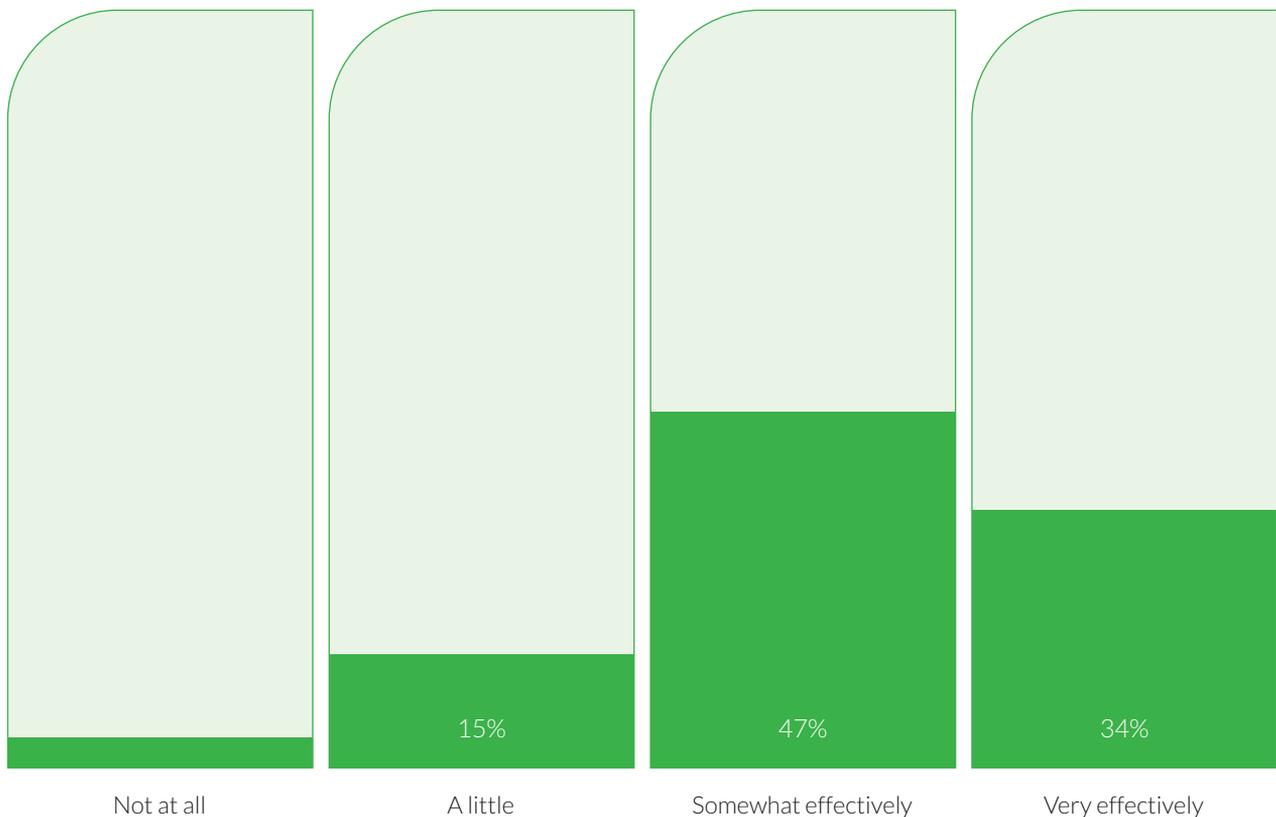
“We'd like to see more pathways to employment, such as internships or job shadowing.”

Student - US University

“Implementing interactive content integration sessions during tutorials, using platforms that permit students to vote on a correct answer using their internet-enabled devices and then receiving feedback by the teacher or program on why each answer is correct or not...”

Student - Australian University

How effectively is your university leveraging digital technologies to enhance your student experience?



“Universities across the globe need to integrate so every student has free access to all eBooks and other materials, irrespective of which college or course they’re enrolled in. Also, a curriculum about how to use this technology with ease should be introduced as there is a large chunk of population averse using online portals.”

Student - Indian University

“Educational institutions could do a better job in teaching emotional intelligence as these skills are not only critical in the workplace but in everyday life.”

Student - Australian University

ENTREPRENEURS

42 edtechs startups

42 edtech founders and senior executives responded to the survey and were interviewed, representing companies from around the world at each stage of the business lifecycle.

Navitas Ventures classifies edtech startups according to the next-generation learning lifecycle, an eight step process that begins with 'Create' (academic research, textbook publishing and digital courseware) and concludes with 'Advance' (bridging study and work). The organisations that responded to the survey predominantly fell into the 'Learn' category (organisations that provide instruction through a blend of old and new models), an area that has been characterised by the rise of MOOCs, bootcamps, and new proprietary platforms over the last five to ten years.

Edtech companies see greater potential for new models

Almost by definition, startup founders are individuals who see – and attempt to fix – unsolved problems. Perhaps unsurprisingly then, edtech companies surveyed are more pessimistic than students in their assessment of universities, with only 21% indicating that universities are adequate or very effective at preparing students for work (versus two-thirds of students indicating that universities can effectively prepare students for work over the next 5 to 10 years).

Similarly, over two-thirds of edtech respondents expect the traditional university model to be disrupted within a decade, a much shorter timeframe than that envisioned by students and university leaders.

Edtech companies feel the pace of change

“There are emerging technologies occurring all around the world. But due to stakeholder hierarchy, slow management decisions and lack of focus on new technologies, by the time the technology becomes implemented, the market may have already moved.”

Early-stage edtech startup - China

“The change is getting faster. It’s constant change, it’s on every different level, every different thing, it’s just getting quicker. So every single s-curve for technology adoption is going quicker; it’s not multiple years or 10 years, it’s 5 years, it’s 2 years or 1 year... The 5 or 10 year product plan is dead. People need to be moving a whole lot faster”

Mid-stage edtech startup - Australia

Later-stage companies more comfortable with the existing system

Interestingly, these trends are strongest for edtech respondents that identified themselves as early-stage startups. By contrast, the edtech companies that identified themselves in the survey as ‘mature’ appear to be more optimistic that universities are effectively preparing students for work.

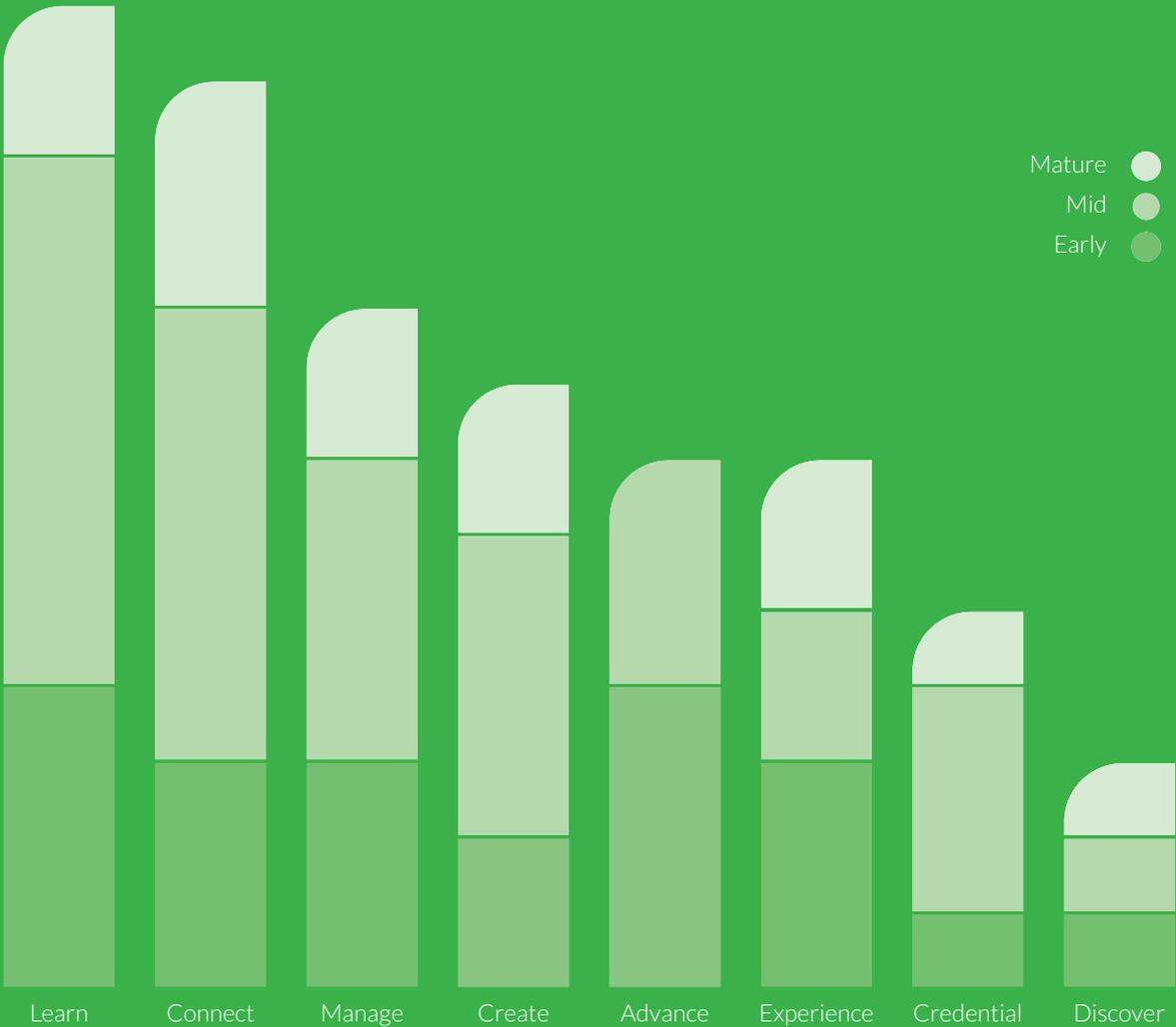
Startups are also focused on the student experience

Although it might be easy to typecast startups as disruptors, out to displace universities, the survey findings suggest they are more focused on improving the current education system and the student experience across the entire lifecycle. While they see the potential for new models in higher education, they also see room to refine the current model. For example, by working with universities to roll out digital content, streamline administrative processes and support the student experience – all high priorities for university leaders.

“Technologies that allow universities to deliver current relevance will be crucial to future success.”

Mid-stage edtech startup - Australia

Of the following categories, which best describes the focus of your start up?



LANDSCAPE HEATMAP

In 2017, Navitas Ventures began mapping the global edtech ecosystem. Through deep data analysis, Project Landscape 3.0 has now identified over 15,000 edtech companies in 50 countries.

Clusters of similar companies have been grouped together into the eight stages of a 'next generation learning lifecycle', helping understand how emerging new models and enhanced platforms are already meeting future needs.

Through this study, which focuses specifically on higher education, it's possible to compare the priorities and perspectives of students, edtech founders and university leaders within each stage of this learning lifecycle.

DISCOVER: Digitising recruitment and admissions

University leaders place high priority on solutions for recruitment and admissions as shown in the Discover

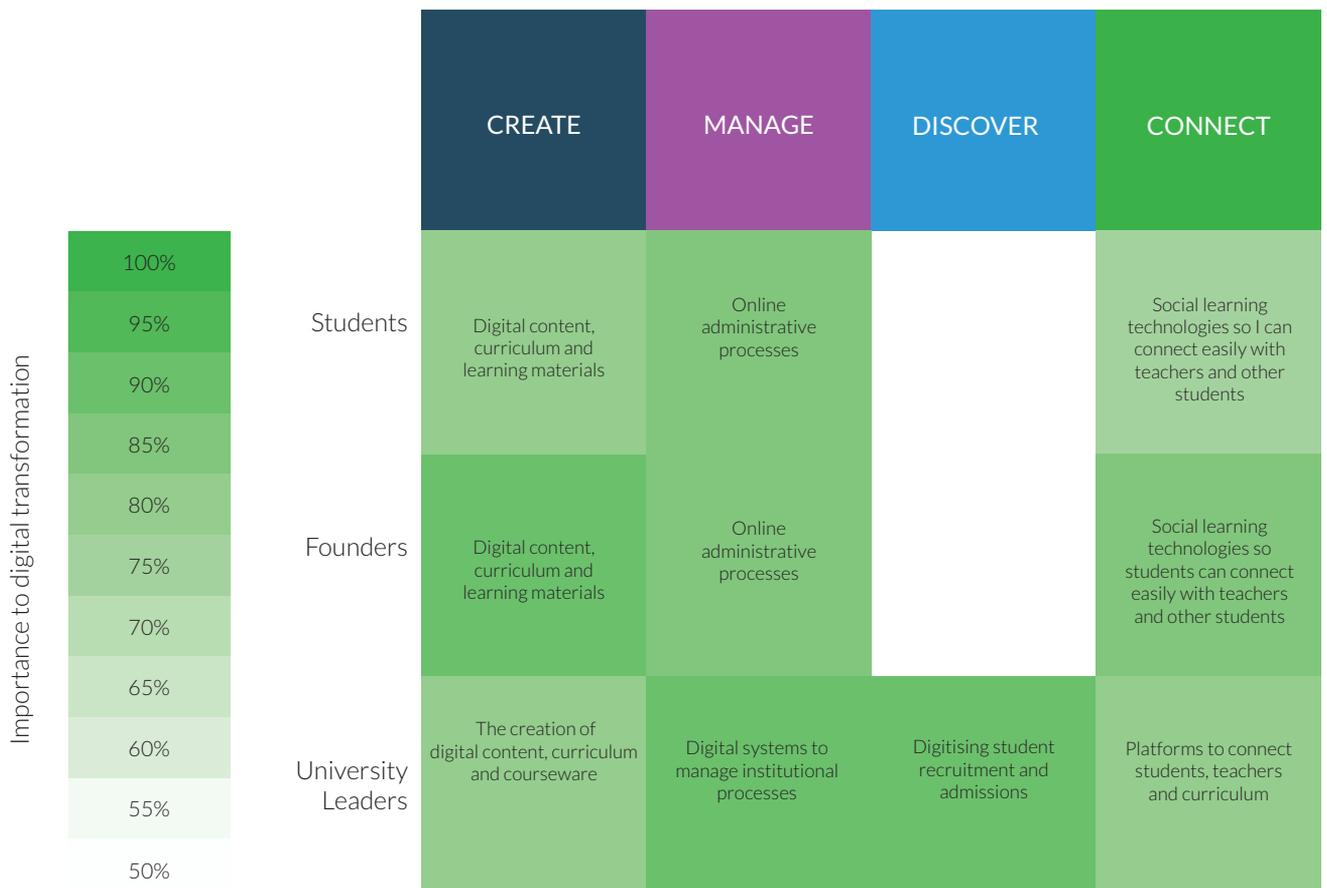
stage. This may reflect the inefficient nature of traditional tools, as well as, perhaps, funding pressures that have been placed on the sector.

MANAGE: Tech-enabled everything

Students, founders and university leaders all agree on the importance of focusing on technology innovation that leads to improvements in the student experience. Digitising content, automating administrative processes and integrated systems might be considered 'digital hygiene' factors these days, however there seems to still be plenty of opportunity for transformation in this space.

LEARN: Options beyond the lecture model

Students are interested in alternative ways of learning as part of their university experience, although the current cohort are less interested in undertaking blended or fully online programmes. University leaders generally have not



yet emphasised alternative instructional models within their transformation initiatives

EXPERIENCE: Skip the bells and whistles

Students placed less emphasis on the use of emerging technologies such as gaming and simulation, robotics or immersive technology than both university leaders and edtech founders. While other data indicates that students are open to new ways of learning, emerging tech is less important than the integration of technologies throughout their whole experience.

ADVANCE: Students want pathways to work

The most striking disparity between university and student priorities appears in the Advance stage. Students place a much higher priority on technologies to support internships and pathways to employment than universities. Edtech founders appear quite attuned to

this demand – perhaps explaining the momentum that ‘learning to work’ models have amassed over the past decade.

LANDSCAPE: The founder’s imperative

Across the board, perhaps as expected, edtech founders place higher priority on change across all dimensions of the learning lifecycle and in particular on those areas where technology can enable better student experience and job outcomes. 68% of founders surveyed reported that universities are not at all, or only marginally effective, in using technology to enhance the student experience and while this may seem ‘harsh judgment’ when compared with only 19% of students on the same scale, edtech founders are focused on building solutions for tomorrow’s learners.

EXPERIENCE		LEARN		CREENTIAL	ADVANCE
An integrated range of digital technologies to support my whole university experience, both in and out of the classroom	Emerging technologies to support my learning experiences	Opportunities to participate in a variety of learning experiences	The opportunity to undertake some or all of my subjects online or in a blend of on-campus and online	A variety of ways to recognise my knowledge and skills	Technologies or platforms to support internships and pathways to employment
An integrated range of digital technologies to support the whole higher education experience, both in and out of the classroom	Emerging technologies to support learning experiences	The opportunity to undertake some or all subjects online or in a blend of on-campus and online	Opportunities to participate in a variety of learning experiences	A variety of ways to recognise knowledge and skills	Technologies or platforms to support, work experience, internships and pathways to employment
Emerging technologies to support the student learning experience		Emerging educational models such as bootcamps and nanodegrees.		New ways of recognising knowledge and skills	Technologies or platforms to support internships and pathways to employment

EMERGING TECHNOLOGIES

Many new edtech entrants have been driven by technology we now take for granted – such as smart devices, cloud computing, broadband internet, and the increasing ease of creating websites and software. As new technologies emerge, they too will have the potential to impact education in the years to come.

Survey respondents considered AI the most significant of a range of emerging technologies. This was followed by the Internet of Things and virtual/augmented reality – perhaps reflecting an interest in connecting the physical and digital worlds as applied to higher learning. Respondents considered chatbots, robotics, and blockchain as being relatively less important, which also reflects the novelty of these technologies.

In absolute terms, the differences were marginal, with each technology falling between '3' and '4' on a 0 to 5 scale. No technology scored in the lower half of the scale, suggesting that respondents consider all the technologies to have at least some potential in higher education.

Artificial Intelligence and machine learning

Artificial intelligence is fundamentally about making decisions based on data – and that describes much of education. Already, AI's existing applications span the value chain, including search tools for scientific research, powering chatbots, connecting learners with universities, and matching students with career coaches.

Consistent with these views, students, universities, and edtech respondents all ranked AI as either the most or second-most significant emerging technology out of those presented. Similar results can be seen along geographic lines, with almost every region considering AI the number one technology (the exception was Asia, which ranked AI as a close number two after IoT).

IoT

The Internet of Things comprises internet-connected devices that can communicate with each other, for instance, to upload sensor readings or receive instructions. Its use cases in higher education range from the hyper-connectivity of student devices to campus infrastructure and cloud services to enable a truly personalised experience. It could also be used to optimise

student health and fitness facilities. With widespread adoption, significantly more data would be available for analysis. Overall, survey respondents considered IoT the second-most significant area, with students and universities more positive than EdTech founders.

AR/VR

Augmented and virtual reality are two technologies whose use in education is just emerging. Already, they are being used to bring science to life, transport classes on virtual trips, and market universities to potential future students. While VR in particular faces barriers such as high cost and limited content, augmented reality (AR) is a more accessible technology application. It has already appeared on campus to support wayfinding and orientation, and in the classroom to enhance knowledge in the medical, engineering and science disciplines.

Perhaps reflecting the early stage of VR in educational applications and its historic association with other industries such as gaming, respondents considered this overall category of moderate significance to higher education. Students appeared more optimistic than edtech companies or universities.

Chatbots and Virtual Assistants

Chatbots – software programs that simulate conversing with a human – have the potential to automatically handle routine queries, freeing up human staff to deal with more complicated problems. Survey respondents considered chatbots of moderate importance, something that held true amongst edtech companies, students, and universities. Indeed, chatbots are already widespread outside the classroom, for instance, answering queries about admissions and helping new students during orientation. There are also emerging examples of chatbots being used in the classroom, for example as a teaching assistant to answer student queries in online forums.

Robotics

Robots are widespread in both engineering and the pre-K-12 context, used as means of introducing STEM concepts. In higher education, their direct use is

“I’m currently at medical school, and much of the content would be helpful to learn through virtual reality (especially anatomy or neurology) so I can visualise it and interact with it. Virtual reality would also be really helpful for learning clinical skills like injections, taking vital signs and surgical techniques.”

Student - Australian University

relatively limited. While universities play a significant role in robotics research and education, robots have not yet reached the mainstream as a tool for teaching and learning. Survey respondents generally consider robotics one of the less significant technologies listed, with universities being relatively more positive.

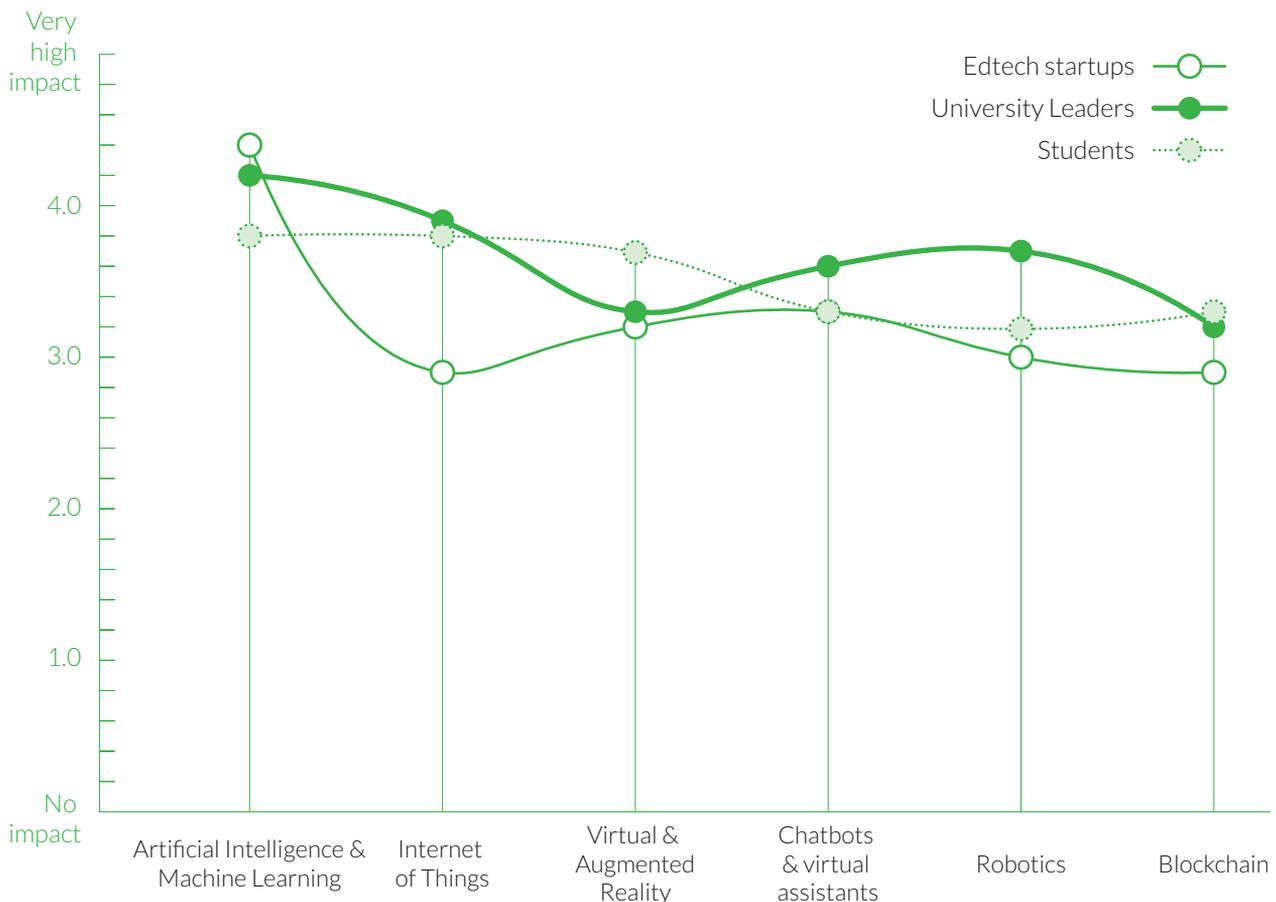
Blockchain

Blockchain is an emerging technology that can be used to store and communicate information in a distributed, secure and efficient way. In the education space,

institutions are experimenting with blockchain as a way to record credentials and potentially other student data such as assessments, achievement of learning and co-curricular accomplishments.

Overall, respondents considered blockchain less significant than the other available options, although still of moderate potential impact. This was fairly consistent among all three groups – edtech companies, students, and universities.

How much impact on Higher Education do you expect from the following emerging technologies?



NEXT STEPS

“This is edtech’s moment... not with simply looking at technology as processes, but technology which leads to transformative experiences.”

Senior Leader - UK University

As with most industries, digitally led change is clearly underway in higher education. This initial snapshot of feedback from those involved in digital transformation is just the beginning. An ongoing program of research will provide insights to the higher education community and the edtech ecosystem.

Outputs from this program of research could be used by higher education leaders as a mechanism for benchmarking objectives, approaches and progress of digital transformation efforts and as an opportunity for collaboration with peers globally. Equally, it may be helpful to edtech founders and the edtech industry to better understand the digital needs and priorities of higher education institutions and to gain further insights into the ‘problems to be solved’.

Overall though, we hope for this program of research to contribute to the enhancement of higher education through technology and innovation, with the outcome of driving good results for the industry and for learners.

We are keen to expand on this initial research alongside our university partners and colleagues, the edtech community and student organisations globally. If you are interested in helping to shape this program of research, please contact us to discuss next steps.

Acknowledgements

We appreciate the generosity and time of those who took part in the survey and interviews, and would like to thank them for sharing their ideas, insights and knowledge about digital transformation in higher education.

Startups including 42, Academy Xi, Adaptemy, AdjunctFinder, Australian School of Applied Management, Authess, Bibliotech, Campus Logic, Collective Campus, Degreed, Differ, Ducere, EasyUni, Echo360, ExamPal, Gradchat, Gradescope, Holberton School, Inkerz, International Alumni Jobs Network, Learning Machine, Learnosity, Lode, Minerva, MissionU, Pat.ai, QLC.io, Sagence Learning, Sharing Academy, Smart Sparrow, StudyLink, UDAY, UnCollege, Voxy, Vivi.io, and Wisenet.

Students from Australia, Belgium, Canada, Germany, India, Kenya, Nigeria, Singapore, Switzerland, United Kingdom, and the United States.

Universities from London and Massachusetts to Canada and Canberra. University leaders represent a diverse range of institutions in the UK, North America and Australia.

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Further reading

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