

EDTECH VIETNAM YEARBOOK 2021



ĐƠN VỊ TÀI TRỢ

ClassIn

EDTECH & THE PARADIGM SHIFT IN EDUCATION



COVID-19 education disruption impacting 180+ countries mandated temporary school closures, leaving ~1.6 billion children and youth out of school at its height and affecting approximately 85% of children world-wide¹

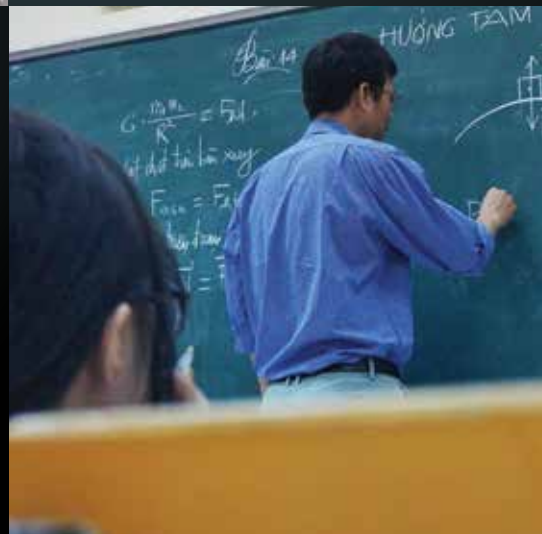


6,7 million students are impacted by COVID-19 school closure in Vietnam



EDTECH

& The paradigm shift in education in the new normal



Countries exploring options for remote learning and use of other educational resources to mitigate the loss of learning



Global edtech venture capital investments totaled more than \$10 billion in 2020, up from \$500 million in 2010

EDTECH MAKES A PARADIGM SHIFT IN EDUCATION

INTRODUCTION

Welcome to the **Yearbook of Edtech Village Techfest 2021**, which celebrates the **people, products, projects, policies** that are shaping education technology all around the world and Vietnam in 2021.

MSc. Do Nguyen Hung,
Leader of Edtech Village Techfest Vietnam



Covid-19 has expanded to approximately every corner of the world and has taken a massive toll on the global economy. Like other sectors, education has been impacted as well. By Sept 2021, the epidemic had spread to over 180 countries, resulting in the closure of over 85 percent of all schools, colleges, and universities, affecting about 1.6 billion students.²

On the other hand, Covid-19 has made a significant PARADIGM SHIFT to how education works – online learning is no longer an option but a must. The transition to online teaching has been so instantaneous. The EdTech industry is inevitably blooming.

This yearbook, therefore, attempts to collate the EdTech scenario from the government as well as private-sector perspective, people, products, projects, along with policies that shape the EdTech industry, and how the COVID-19 crisis is an opportunity for the EdTech ecosystem to scale up and become the new normal.

This yearbook is a collective effort of Edtech Village under Techfest, organized by the Ministry of Science and Technology of Vietnam.

_Edtech Village Techfest Vietnam 2021

² <https://www.worldbank.org/en/topic/edutech#1>

CONTENT

I.	Edtech and the paradigm shift in Education worldwide	7
1.	Covid-19 impact on global education system and the paradigm shift in education	7
1.1.	Covid-19 Impact on global education system	7
1.2.	Edtech & Paradigm shift in education	9
2.	Edtech Startup Development in the new Paradigm of Education	10
2.1.	Edtech global market overview	10
2.2.	Edtech in Asian market	13
2.3.	Edtech development during Covid	15
	Edtech in developed countries	15
	Edtech in emerging countries	16
3.	Major policies embracing Edtech	17
II.	Edtech and the paradigm shift in Education in Vietnam	19
1.	History of Edtech in Vietnam	20
2.	Overview of Vietnam EdTech market	21
3.	Current status of Edtech solutions in Vietnam	21
3.1.	Types of Edtech solutions	21
3.2.	Current status of Edtech solutions in Vietnam	23
4.	Edtech companies in Vietnam ranking	23
4.1.	Rating process	23
4.2.	Handling data and ratings	24
4.3.	Rating Results	25
5.	Major policies influencing Edtech development in Vietnam	25
6.	Edtech investment in Vietnam	27
7.	Edtech market potential especially after Covid	28
III.	Looking back and forward for Edtech – the paradigm shift	29
1.	Key constraints for using EdTech at scale	30
2.	Edtech Trends	30
2.1.	Virtual classroom to Tech-Enabled Immersive Learning environment	30
2.2.	From schools to Innovative K-12 Homeschooling Startups & E-learning	31
2.3.	AI-Enabled Adaptive Learning (And Admin)	31
3.	Suggestions for empowering Edtech development in Vietnam	32
3.1.	For investors	32
3.2.	For organizations which use Edtech solutions	32
3.3.	Suggestions for EdTech companies	33
3.4.	Suggestions for Edtech policies	33
IV.	THE PARADIGM SHIFT	35
V.	EDTECH VILLAGE, TECHFEST VIETNAM	36
1.	About Edtech village	37
2.	Main activities of Edtech Village	37
3.	Partners of Edtech Village 2021	37
4.	Human resources of Edtech village 2021	39
5.	Contributors of Edtech Year book	41

CHAPTER I

EDTECH & THE PARADIGM SHIFT IN EDUCATION WORLDWIDE



1. Covid-19 impact on global education system and the paradigm shift in education

1.1. Covid-19 Impact on global education system

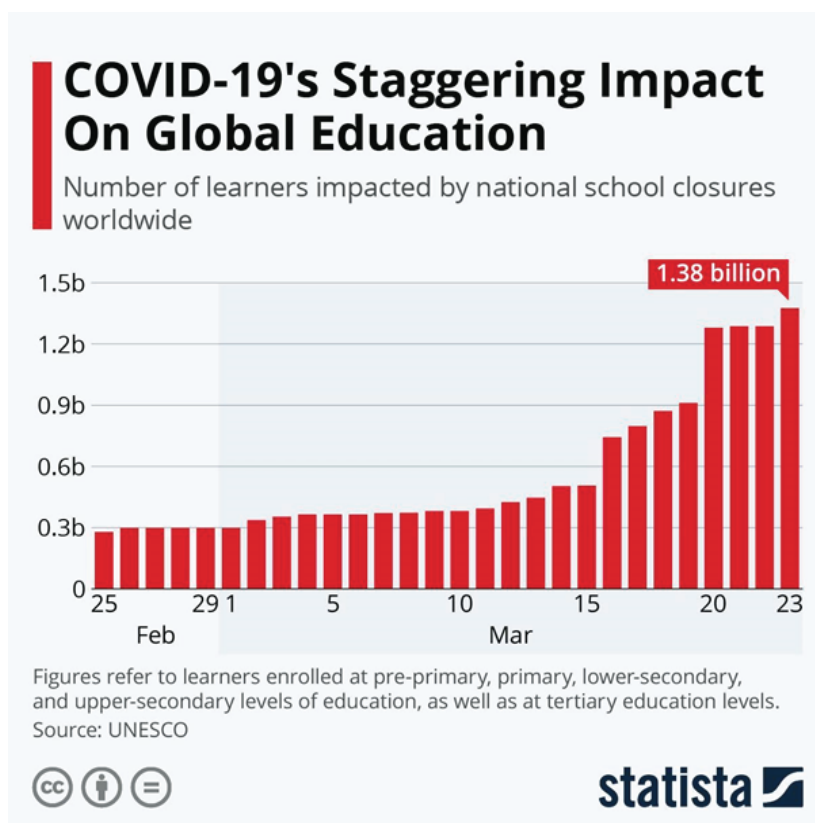


Figure 1: Covid-19's staggering Impact On Global Education³

Before the pandemic, almost 258 million children and youth of primary and secondary levels were out of school. The learning poverty rate in low and middle-income countries was 53 percent - meaning that over half of all 10-year-old children couldn't read and understand a simple age-appropriate story.

³ <https://www.weforum.org/agenda/2020/03/infographic-covid19-coronavirus-impact-global-education-health-schools/>

⁴ The Covid-19 Pandemic: Shocks To Education And Policy Responses, The World Bank, May 2020

Key Moment:

- 21 February: China closes schools nationwide
- 12 to 16 March: The number of countries closing schools nationwide increases from 37 to 112
- 21 March: 168 countries adopt country-wide school closures
- 30 March: Nato school closures in 181 countries involve 87.4% of the global enrolled learners

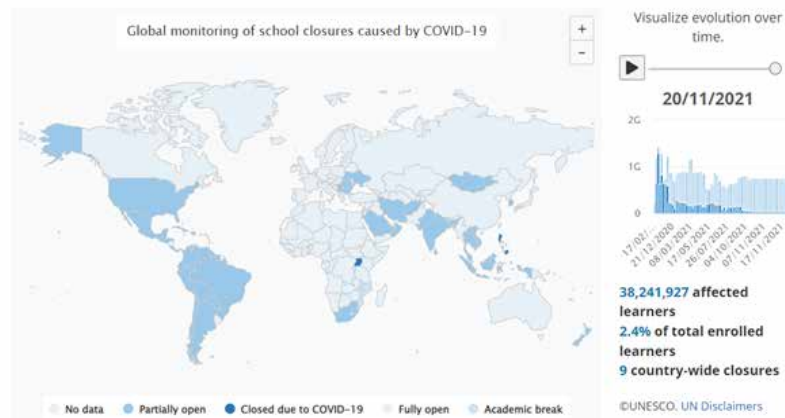


Figure 2: School closures caused by Covid-19⁵

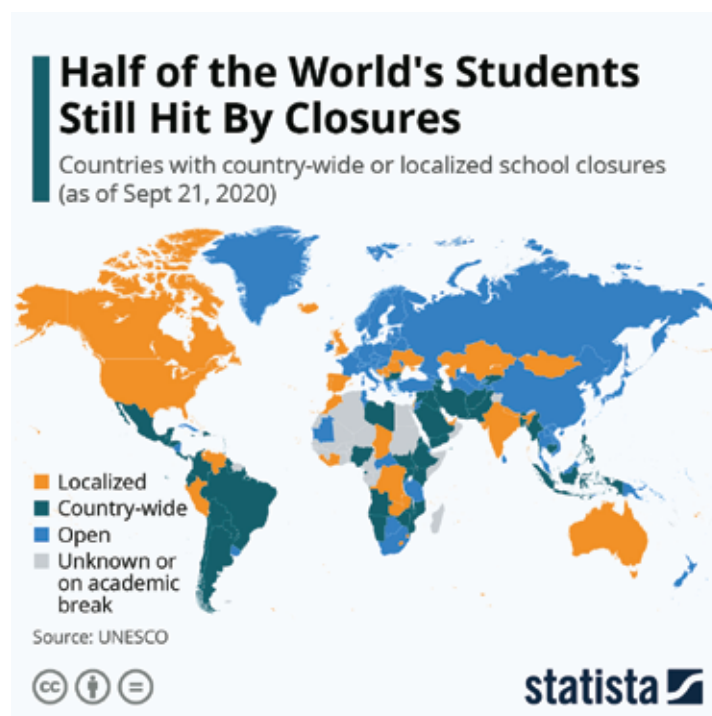


Figure 3: Percentage of students affected by COVID-19 school closures, globally

1.2. Edtech & Paradigm shift in education

The advancement of Information Technology has transformed the world. There has been a tremendous impact of technology on contemporary education and teaching. The education sector has witnessed a **paradigm shift** in education at different levels: institutional and individual.

At the institutional level:

Previously, schools and universities used to be centers of knowledge and learning. However, there was a net outflow from these centers to a more extended world. While most of them might still see themselves operating this same way in terms of research, much of their teaching is influenced by outside changes. They no longer are the only or primary lead in determining learning outcomes. Educational institutions need to build **a powerful internal capability** and **an open innovation culture** to emerge with the rapid development of technology, businesses, and society.

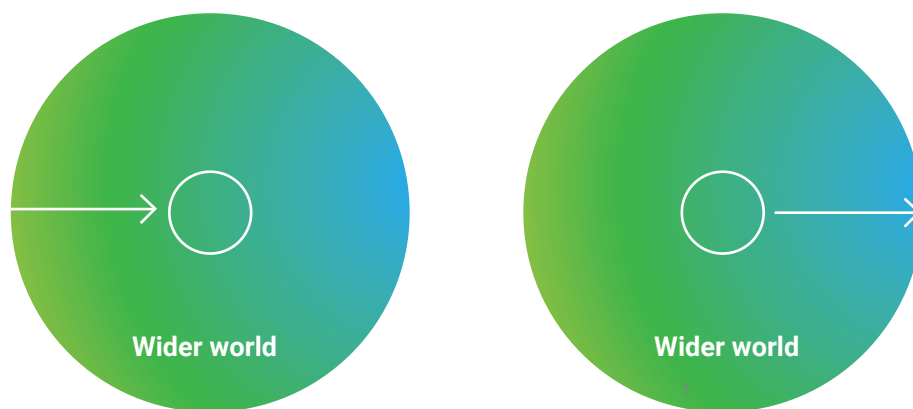


Figure 4: Universities before and now⁵

At individual level:

In the new era, the roles of teachers have been redefined. Teachers have now adopted the role of a **guide, facilitator, mentor, and coach**. Students have access to information through various technological sources. Therefore, teachers have to keep updated with the latest technologies to be in tune with their students. They have to support their students in selecting and analyzing the information to derive a meaningful conclusion out of it. Teachers have to **put themselves as learners to learn and change** how they teach.

Technology doesn't replace teachers but is a great supporting tool.

Teachers become facilitators, mentors and coaches

Teaching method and teaching materials:

The use of audio-visual mediums like projectors, audio, and videos enhances the teaching medium. The Internet has paved the way for the knowledge economy. Its massive knowledge base is used in the form of books, encyclopedias, current affairs, historical perspectives, etc. Social media, YouTube, Facebook, WhatsApp... all have become critical tools for gathering as well as disseminating information.⁶



2. Edtech Startup Development in the New Paradigm of Education

2.1. Edtech global market overview

With an increase in the number of online students, Edtech is blooming. The EdTech market has even been forecasted to grow at an average rate of 14.5% to 16.4% per year until 2025, accounting for 5% to 6% of the overall education market at USD 400 billion worth.

⁶<https://ashleytan.wordpress.com/2019/05/06/edtech-paradigm-shift/>

⁶https://www.researchgate.net/publication/335796780_A_paradigm_shift_in_education_through_technology

EdTech (abbreviation of Educational Technology) refers to not only online education but also a variety of learning tools and services leveraging digital technologies such as artificial intelligence (AI) and virtual and augmented reality (VR/AR)

Global Edtech market:

- According to HolonIQ, the total investment in the global Education Technology (EdTech) market will reach USD 227 billion in 2020 and is estimated to grow strongly by 12.2% by 2025, reaching USD 404 billion.
- The rate of investment in educational technology is uneven globally. The Asia-Pacific region accounted for more than 54% of total investment in EdTech in 2020.
- China makes up two-thirds of global venture capital.
- Many innovative technologies are incorporated into teaching and learning curricula globally, with VR/AR being the most adopted.
- The world's mobile learning is growing strongly - the mobile learning market size has surpassed 20 billion USD in 2019 and is forecasted to grow at a CAGR = 13% from 2020 to 2026.⁷

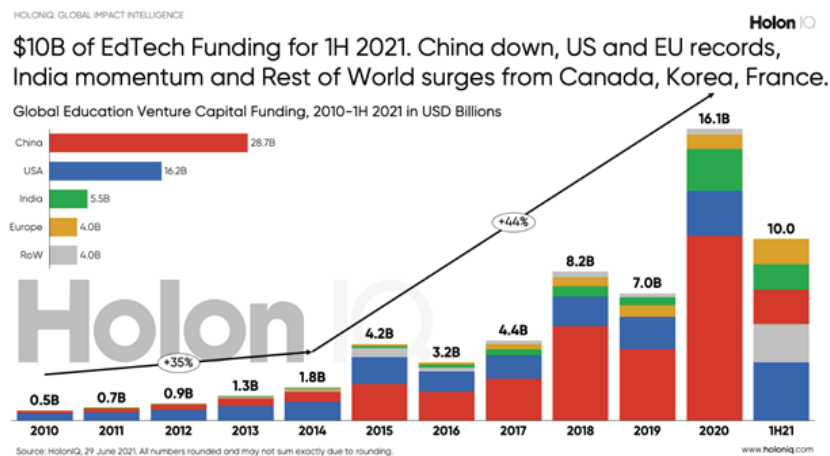


Figure 5: Edtech Funding

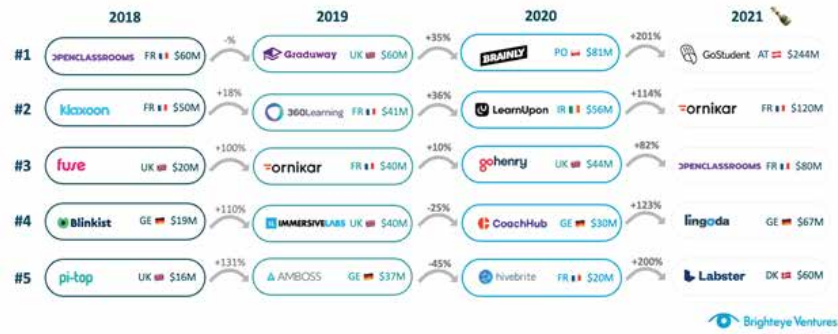


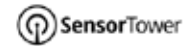
Figure 6: Deal-size progression in edtech over the years⁸

Edtech is being taken seriously by generalist investors because the actual size of the market (and the extent of digitization to come) is becoming more conceivable.



Figure 7: Top Education Apps Worldwide

Top Education Apps Worldwide for June 2020 by Downloads



Overall Downloads	App Store Downloads	Google Play Downloads
1 Google Classroom	1 Google Classroom	1 Google Classroom
2 YouTube Kids	2 LGB360	2 YouTube Kids
3 Duolingo	3 Duolingo	3 Duolingo
4 Cake	4 PictureThis	4 Cake
5 U-Dictionary	5 YouTube Kids	5 U-Dictionary
6 Baby Panda World	6 PicCollage	6 Baby Panda World
7 PictureThis	7 Himalaya	7 Toca Kitchen 2
8 Toca Kitchen 2	8 Photomath	8 Vedantu
9 Photomath	9 Driver Handbook	9 DoubtNut
10 Vedantu	10 Homework Aid	10 Photomath

Note: Does not include downloads from third-party Android stores in China or other regions.

SensorTower Data That Drives App Growth sensortower.com

Figure 8: Top Education Apps Worldwide for June 2020 by Downloads worldwide

2.2. Edtech in Asian market

- Asia is a growing market for e-learning services.
- Asian EdTech Market is forecasted to grow rapidly - Asian EdTech Market Asia Pacific (mostly E-learning) is estimated to increase at 13.7% annually with a total market capitalization of 716.5 billion USD in 2020 - 2026.
- Asia is the most potential market for EdTech – Currently, there are more than 600 million students in general education (K-12). In the next five years, the continent is predicted to account for more than 17.3% of the global EdTech market, becoming the world's largest EdTech market.

The Asian EdTech market is forecasted to grow sharply. According to the Report of Research & Markets, 2020 (the world's leading market research company), the demand for EdTech schools in the Asia Pacific is believed to increase by 13.7% annually, with total market capitalization reaching 716.5 billion USD from 2020 to 2026.

To date, Adobe Systems Inc., Cisco Systems, Meridian Knowledge Solutions, Citrix Education, Microsoft Corporation, Skillsoft Inc. and SAP SE are the key players operating in the market.

<i>Adobe Systems Inc.</i>	<i>Cisco Systems</i>		<i>Meridian Knowledge Solutions</i>
			
<i>Citrix Education</i>	<i>Microsoft Corporation</i>	<i>Skillsoft Inc.</i>	<i>SAP SE</i>
			

Figure 9: Cooprates supply Edtech solutions



Figure 10: Investment in Edtech in Asia

2.3. Edtech development during Covid

As the roles of teachers shift toward coaching, mentoring and empowerment, the Edtech solution is turning toward creating a collaborative space for students and teachers to study together. The main business models and characteristics of growing companies are presented in the following figure.

FOR LEARNERS

Platform type

Platforms for delivering existing educational institution & educator programs and content to learners (MOOCs/language education/vocational education, etc.)

Integrated type

In-house production and development of lesson videos as well as learning content, delivery on websites or smartphone apps

Edtech in developed countries

In developed countries which have the established presence of educational institutions and private tutoring schools, EdTech companies develop notably with the impact of Covid mainly belong to 2 aspects:

- **Support for business operators:** There is a prompt growth of companies that support business operators, for example, providing learning Management Systems (LMS) to manage curricula, learning progress, and test results...

- **Platforms for learners:** There is also fast growth of companies providing MOOCs (Massive Open Online Courses). A variety of learning programs is delivered in a MOOC platform, partnered with universities and instructors.

FOR BUSINESS PROVIDERS

Support type

Digital tools include school administration management & learning management systems (LMS), program creation tools.

Services for supporting textbook digitalization and providing¹¹ textbooks as well as teaching materials such as VR/AR, STEM teaching materials.

Edtech in emerging countries

Companies providing integrated services from content development to delivery are growing, focusing on supplementary learning, capturing learners in areas with a shortage of conventional private tutoring schools and home tutors.

	Head office location	Company name	Established	Target	Corporate value (USD billion)	Total funding (USD million)
Listed companies	US	Blackboard	1997	All courses	-	122
	US	2U	2008	Higher education	2.6	427
	US	K12	2000	K-12	1.4	20
	US	Chegg	2005	Higher education	8.4	252
Start-ups (Unicorn companies)	Canada	ApplyBoard	2015	Higher education	1.4	126

Start-ups (Unicorn companies)	US	Coursera	2011	Higher and vocational education (MOOCs)	2.6	443
	US	Udemy	2010		2.0	223
	US	Udacity	2011		1.1	105
	US	Guild Education	2015	Vocational education	1	229
	China	Huike	2010	Higher and vocational education	1	302

Table 1: Main EdTech Companies

The world has also witnessed the emerging unicorns coming from China and India. In 2020, Yuanfudao came into the spotlight with over 400 million users. Yuanfudao received USD 1 billion in funding from investors, including Tencent and US-based IDG Capital, bringing its corporate value to USD 7.8 billion. Some companies have grown to be valued at over USD 10 billion in India: BYJU'S, which boasts 3 million paying users, raised USD 420 million in funding in 2020.

Apart from the emerging of new companies, some noticeable acquisitions occur with traditional big EdTech companies. Pearson, the world's largest education company by sales amount, is strengthening their EdTech Trekking segment with the digitization of textbooks and online learning businesses. Meanwhile, Benesse is also entering the field of EdTech through initiatives such as digitalizing distance learning courses and developing cloud-based LMS.

During the pandemic, major IT companies are also beginning to provide services for learners on top of their existing offerings for educational institutions.

¹³ Michael B. Horn/Heather Staker. *Blended: Using Disruptive Innovation to Improve Schools*. Kyouikukaihatsu Kenkyusyo. p 207.
The acronym of Science, Technology, Engineering and Mathematics. Initiatives to strengthen education for integrated learning of the STEM area began in the United States in the 2000s. STEAM education adding the "A" of Art is also gaining attention.
See OECD Policy Responses to Coronavirus (COVID-19) "Learning remotely when schools close: How well are students and schools prepared? Insights from PISA" (Updated 3 April 2020)
The acronym of Science, Technology, Engineering and Mathematics. Initiatives to strengthen education for integrated learning of the STEM area began in the United States in the 2000s. STEAM education adding the "A" of Art is also gaining attention.
See OECD Policy Responses to Coronavirus (COVID-19) "Learning remotely when schools close: How well are students and schools prepared? Insights from PISA" (Updated 3 April 2020)

CASE STUDY – ALIBABA

The company has previously operated an e-commerce site: "Taobao Education" for selling educational products and services. In March 2020, it advanced into the EdTech field by launching the study Q&A platform "Bangbangda" for elementary and junior high school students.

The company provides the DingTalk video-conferencing and communication tool, which is an existing service, to educational institutions.



3. Major policies embracing Edtech

The educational policies of different countries have begun incorporating perspectives aiming to realize effective learning leveraging technology. Policies are wide-ranging: the establishment of environments such as the Internet and devices; introduction of LMS, digital learning materials, digital whiteboard, STEM education materials for programming and others; and assignment of specialized digital personnel.¹¹

¹¹

Materials published by the U.S. Department of Education, Office of Educational Technology

Materials from 1st BCG presentation in the Ministry of Economy, Trade and Industry's "Future Classroom" and EdTech Study Group

European Commission "Digital Education Policies in Europe and Beyond" (2017)

UNESCO "Building tomorrow's digital skills: what conclusions can we draw from international comparative indicators?"

OECD Materials published by the Ministry of Education, Culture, Sports, Science and Technology and the Ministry of Economy, Trade and Industry

Listed companies	China	TAL Education	2003	K-12	45.1	500
Start-ups (Unicorn companies)	India	BYJU'S	2011	K-12	10.8	1,576
	China	Yuanfudao	2012	K-12	7.8	1,544
	China	Zuoyebang	2014	K-12	7.3	1,335
	China	VIPKid	2013	Language education/K-12	4.5	975
	US	Duolingo	2011	Language education	1.7	148
	India	Unacademy	2010	K-12	1.5	328
	US	Course Hero	2006	Higher education	1.2	98
	China	Knowbox	2014	K-12	1	150
	China	Zhangmen	2010	K-12	1	350
	US	Quizlet	2005	K-12	1	62
	US	Age Learning of	2007	K-12	1	150
	China	17zuoye	2011	K-12	1	250
	China	Hujiang	2001	K-12	1	157

Table 2: EdTech-related Policies in Major Countries and Regions

CHAPTER II

EDTECH AND THE PARADIGM SHIFT IN EDUCATION IN VIETNAM



Across Vietnam, during Covid, a range of education technology people, products, projects, and policies have supported teachers and learners. Digital learning impacts several education institutions, sustaining knowledge, skills development and creativity.

Vietnam experiences a paradigm shift in education, both at the cities and provinces level.

1. History of Edtech in Vietnam

The Vietnamese EdTech market has so far gone through five stages of development:

Phase 1 (2000-2004): Appearance of EdTech research and applications in the school learning.

Phase 2 (2006-2008): The first EdTech & E-learning products appeared.

Phase 3 (2010 -2012): Boom in the number of projects and products launched.

Phase 4 (2015 -2017): The market is willing to spend more money.

Phase 5 (From 2020): EdTech and E-learning are moving into a new phase. Everyone knows about distance learning and teaching.

Edtech Vietnam experiences 5 stages:

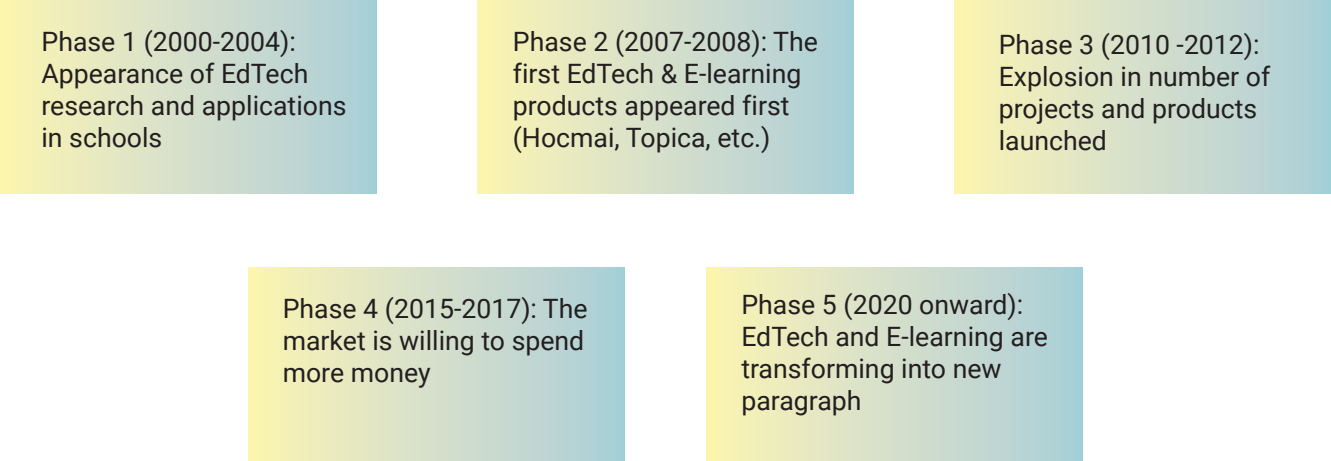


Figure 11: 5 stages of Edtech¹²

¹² Edtech overview of Edtech Agency 2021

2. Overview of Vietnam EdTech market

Vietnam's EdTech market is evaluated to be particularly potential in terms of high-quality human resources, better information technology qualifications than many countries in the region, and a good connection with Silicon Valley.

Vietnam's EdTech market received the third-highest total investment capital in start-ups with 20.2 million USD in technology fields today, only behind Fintech with 129.1 million USD and E-commerce with 34.7 million USD. Moreover, according to Ambient Insight's research in 2019, Vietnam is also in the top 10 EdTech markets, with the highest growth rate in the world at about 44.3%.

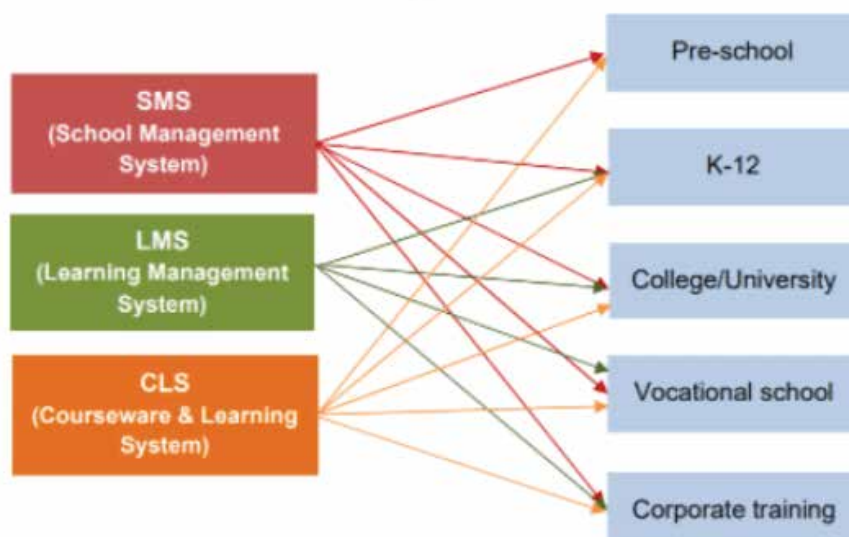
Vietnam's E-learning market has witnessed a noticeable development. In 2019, total revenue reached 1.44 billion USD (up from 0.25 billion USD in 2013), the development pace for the whole period reached 33.8%.

In addition, learning through mobile devices in Vietnam has become widespread - as of the end of 2019, more than 90% of students in Vietnam use personal mobile phones, computers or laptops to study, equivalent to nearly 22 million people. This is considered the most potential user group in the Vietnamese EdTech market. Therefore, with the trend of digital transformation in education and young people's habit of using technology, the online learning market will become more popular and accessible in the coming time.

3. Current status of Edtech solutions in Vietnam

3.1. Types of Edtech solutions

The most commonly used EdTech products in Vietnam include SMS (School Management System), LMS (Learning Management System) and CLS (Courseware & Learning System). All 3 EdTech products have extensive applicability at all levels of education in Vietnam.



School Management System - SMS



Learning Management Systems - LMS



Language Learning



Online courses platforms



3.2. Current status of Edtech solutions in Vietnam

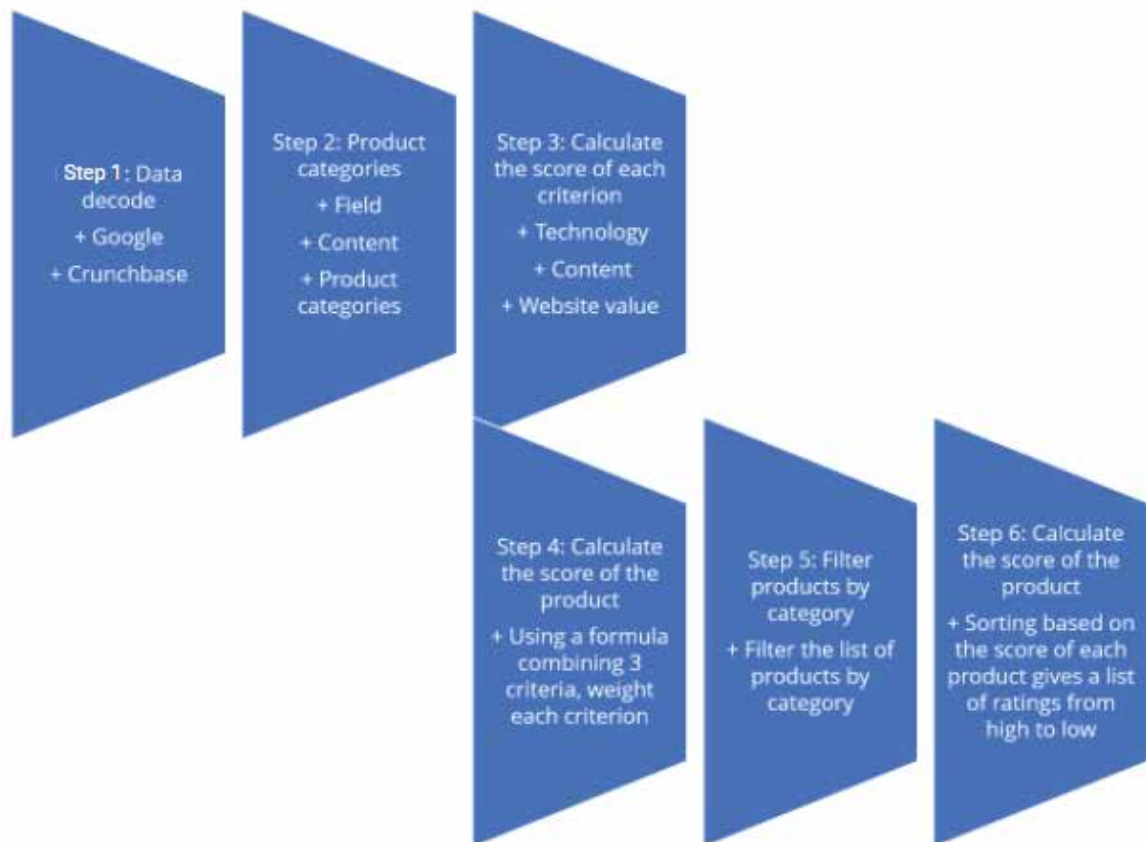
The distribution between types of products is not uniform. The educational technology market in Vietnam is still new and young. Current EdTech products only meet a small proportion of customer needs. Although there is great potential for development and the product types are relatively diverse, it can be said that product quality and distribution among types are not uniform.

EdTech applications in Vietnam have not been fully exploited. In Vietnam, traditional learning methods still account for a large proportion, so EdTech products have to take a lot of time and go through many processes to be introduced.

Adequate investment: Businesses and schools in Vietnam do not have a fixed budget for investment in educational technology.

4. Edtech companies in Vietnam ranking

4.1. Rating Process



4.2 Handling data and ratings

Theoretical foundations and classification bases

Theoretical basis: TPACK (Technological Pedagogical Content Knowledge) model is a theoretical framework that helps educators and managers design more effective teaching-learning and training systems. This model includes factors that combine: Technology + Pedagogy + Content - Knowledge.

Edtech business classification is based on the improved TPACK model, including the following criteria: Technology + Content, Knowledge + Business Value.

Standard	Criteria	Meaning
Technology (T)	The highest traffic	Shows the load capacity of the system.
Content – Knowledge (CK)	Total traffic for 6 months	Shows how much traffic is attracted by the system's content.
Business Value (V)	Evaluating website values	Website is the property of the unit ranked according to the global system.

Table 3: Applying evaluation according to TPACK model

Determine the weights for each criterion to calculate the score for the product (business) as suggested by Edtech Agency. Edtech Agency.

$$\text{rank}(\text{〔Pro〕}_i) = \alpha * 1/V + \beta * CK + \gamma * T$$

Where α , β , γ are the weights corresponding to the Enterprise Value, Technology and Content-Knowledge standards of the extended TPACK model.

- $\alpha = 0.5$

- $\beta = 0.3$

- $\gamma = 0.2$

4.3. Rating Results

TECHFEST VIETNAM 2021 **ED** **EDITION VILLAGE**

ĐƠN VỊ LÃNG TỔ CHỨC GET FHS EA BK Holdings

PHÂN KHÚC MẦM NON

PHÂN KHÚC GIÁO DỤC PHỔ THÔNG

PHÂN KHÚC ĐÀO TẠO DOANH NGHIỆP

TOP CÁC SẢN PHẨM EDTECH TRÊN THỊ TRƯỜNG VIỆT NAM

ĐƠN VỊ TỔ CHỨC HOẠT ĐỘNG RANKING EA BK Holdings

ĐƠN VỊ TÀI TRỢ Kiến Guru ClassIn

5. Major policies influencing Edtech development in Vietnam

In the last five years, many policies and schemes promoting technology application in education have been promulgated and approved by the Government. During the Covid period, several policies have been acquiesced to facilitate digital transformation and technology application in education.

The project "Strengthening the application of information technology in management and support for teaching - learning activities and scientific research contributes to improving the quality of education and training in the 2016-2020 period, with a vision to 2025"	
May 2017	<ul style="list-style-type: none"> The Prime Minister approves until 2020: 70% of meetings between state management agencies and education and training institutions are conducted online; 70% of professional training courses for teachers and education administrators are conducted online by blended learning method.
Aug. 2018	<p>Decree 86/2018/ND-CP stipulating foreign cooperation and investment in the field of education</p> <ul style="list-style-type: none"> Revised Decree 86, issued in May 2018, regulating foreign cooperation and investment in the education sector has created impetus and conditions for online and blended learning in programs, associate (twinning) at the university level. Since then, the Ministry of Education and Training has issued specific regulations on joint training conducted online and a combination of online and
June 2020	<p>Program "National digital transformation to 2025, orientation to 2030"</p> <ul style="list-style-type: none"> Implement and apply an educational model that integrates science, technology, engineering, mathematics and art, business, and enterprise (STEAM/STEAM) Offering Massive Open Online Courses (MOOCs) to all citizens Popularizing the online exam; recognition of the value of online learning certificates; building a platform for sharing teaching and learning resources; etc

Project "Strengthening the application of information technology in management and support for teaching, learning, and scientific research activities to contribute to improving the quality of education and training in the 2016-2020 period, orienting towards 2025" in which by 2020:

- 70% of meetings between state management agencies and education and training institutions are conducted online.
- 70% of professional training classes for teachers and educational administrators are conducted online using a blended learning method.

August 2018:

Decree 86/2018 establishing foreign cooperation and investment in education.

Revised Decree 86, issued in May 2018, regulating foreign cooperation and investment in the education sector, has created impetus and conditions for online and blended learning in programs, associating (twinning) at the university level. Since then, the Ministry of Education and Training has issued specific regulations on joint training conducted online and a combination of online and classroom training.

June 2020:

Program "National digital transformation to 2025, orienting to 2030:

- Implementing and applying an educational model that integrates science, technology, engineering, mathematics, art, business, and enterprise (STEAM/STEAM).
- Providing Massive Open Online Courses (MOOCs) to all citizens.
- Universalizing online exams, recognizing the value of online learning certificates, building a platform to share teaching and learning resources, etc.
- Providing Massive Open Online Courses (MOOCs) to all citizens.
- Universalizing online exams, recognizing the value of online learning certificates, building a platform to share teaching and learning resources, etc.

Jul 2020	Official Dispatch No. 4003/BGDĐT-IT 2020 on Information technology tasks for the school year 2020 - 2021
	<ul style="list-style-type: none">• Directing schools and teachers to actively build online teaching materials, focusing on building E-learning lectures, online question banks, 3D materials, virtual experiments, simulation software, books interactive electronics, etc.• Selection of online teaching software solutions (synchronous online teaching, asynchronous online teaching), testing and evaluation software, digital data warehouse software, digital library software, etc. in the overall direction.
Aug 2020	Directive No. 666/CTBGDĐT on Tasks and solutions for the 2020-2021 school year of the Education sector
	<ul style="list-style-type: none">• Promote digital transformation, step up the application of information technology in education and training.• Strengthen the application of information technology in teaching, testing, assessment and educational management, school administration; promoting online teaching; develop the industry-wide digital data warehouse.
Sept 2020	Circular No. 32/2020/TT – BGDĐT on Promulgating the Charter of junior high schools, high schools and high schools with multiple levels of education
	<ul style="list-style-type: none">• From November 1, 2020, middle and high school students are allowed to use smartphones during school hours for learning purposes and must be allowed by teachers.

July 2020:

Official Dispatch No. 4003/2020 on Information Technology Tasks for the School Year 2020-2021.

- Directing schools and teachers to actively build online teaching materials, focusing on building E-learning lectures, online question banks, 3D materials, virtual experiments, simulation software, interactive e-books, etc.
- Selecting online teaching software solutions (synchronous online teaching, asynchronous online teaching), testing and evaluation software, digital data warehouse software, etc.

August 2020:

Directive No. 666/CTBGDT on Education Sector Tasks and Solutions for the 2020–2021 School Year.

- Promoting digital transformation, stepping up the application of information technology in education and training.
- Strengthening the application of information technology in teaching, testing, assessment, and educational management; promoting online schooling; developing the industry-wide digital data warehouse.

September 2020:

Circular No. 32/2020 on Promulgating the Charter of Junior High Schools, High School Heads, and High Schools with Multiple Levels of Education.

From November 1, 2020, middle and high school students are allowed to use smartphones during school hours for learning purposes and must be permitted by teachers.

6. Edtech investment in Vietnam

6.1. Investment structure

Public/private sector allocation

Previously, investments in EdTech Vietnam came mainly from the private sector (private investment accounted for more than 70%). Most EdTech companies still rely on the founders' financial support and angel investors or domestic investment funds.

Investment capital structure

According to the Vietnam Tech Investment Report 2019 – H1/2020 by Do Ventures, EdTech was the third most invested field in Vietnam in the past eight years. The total venture capital investment in this field is 103 million USD, only behind the payments (\$462 million) and retail (\$416 million) sector.

7. Edtech market potential especially after Covid

With the complicated developments of the Covid-19 pandemic, the application of technology in education in general and online learning, in particular, is still considered an effective solution in 2021. According to experts from Fulbright University In Vietnam and EdTech Asia, the Covid-19 pandemic has forced relatively traditional as well as passive education systems like Vietnam to change and adapt to new circumstances and times. In addition, the disturbances caused by the pandemic also create a remarkable opportunity for EdTech product suppliers in Vietnam to have a 'martial ground' and gain more attention.

It shows that the Vietnamese EdTech market will continue to be vibrant and develop in 2021.

Ken Research forecasts that the size of Vietnam's online education market will reach 3 billion USD by 2023 with a CAGR of 20.2%.

In terms of technology products, according to an expert of Teky Holdings (Technology Innovation Center), from 2021 to 2025, the EdTech market in Vietnam will continue to develop in three main phases:

- Continue to flourish with units providing online learning content (online) - B2C
- Diversify digital transformation solutions for businesses and educational institutions - B2B
- Dive into the most advanced technologies such as AI, AR, VR, robots, etc., in teaching and learning.

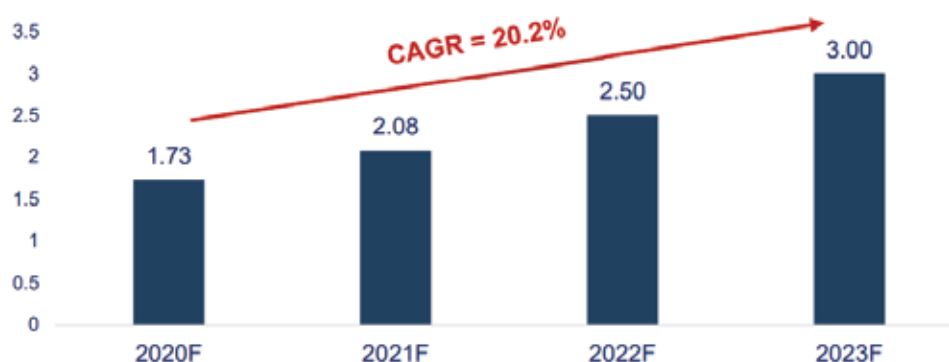


Figure 13: E-learning market size in Vietnam by revenue, 2020F - 2023F



CHAPTER III

LOOKING BACK AND FORWARD FOR EDTECH

THE PARADIGM SHIFT

1. Key constraints for using EdTech at scale

EdTech alone cannot close the gap in education in the new normal. To achieve the most effective learning outcomes for learners, all stakeholders need to work together. Each country has to identify the key challenges to find the best solutions and collaborative model.

Some fundamental challenges that Edtech stakeholders have to work with other stakeholders in the ecosystem are:

- Many children do not have access to technology or a suitable learning environment at home.

Access to the Internet is crucial for online learning. It will be more effortless for those with access and exclude considerably disadvantaged learners. Many learners may have no electricity, some will have a radio but not television at home, others will have basic feature mobile phones but not smartphones, and others will have only low-bandwidth internet available.

- Teachers' ability to adapt to delivering education remotely will vary greatly

Some teachers are unfamiliar with technology and may feel overwhelmed if they are suddenly required to use technology new to them and held accountable to new standards. Institutions must be aware of their teachers' ability to set expectations accordingly and arrange training capabilities of using applications.

2. EdTech Trends

2.1. Virtual classroom to Tech-Enabled Immersive Learning environment

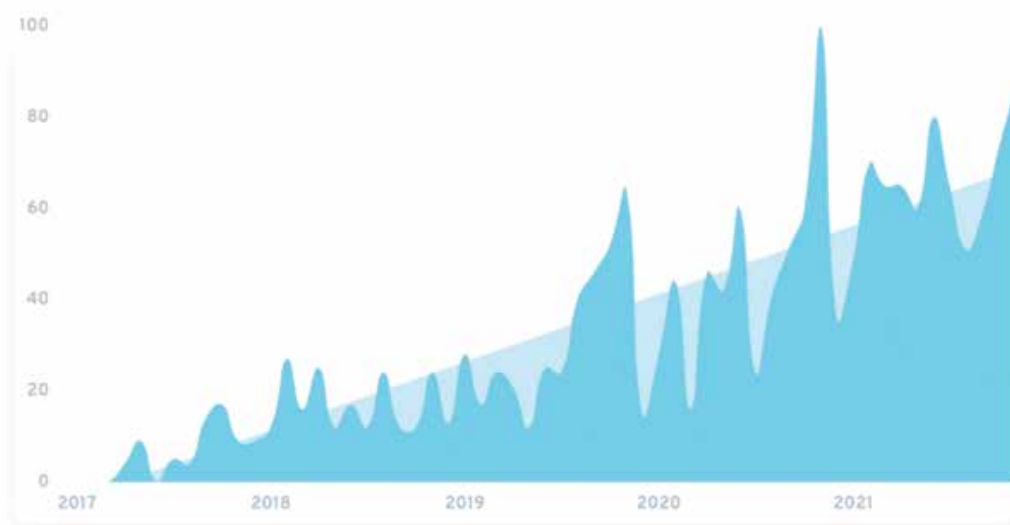


Figure 14: Google searches for "extended reality" are up 8,500% since 2017

Edtech will support the process of transiting virtual classrooms into Tech-Enabled immersive learning environments by enhancing the visual learning process. Students can see 3D depictions of dinosaurs, chemical elements, the human body and more (e.g., Adobe Aero) by using AR.

Another type of immersive learning is "makerspaces" - physical areas of a classroom, school, library, or community center that allow students to build things by hand (e.g., littleBits). Edtech is to enable everyone to become a creator through a co-creation process.

2.2. From schools to Innovative K-12 Homeschooling Startups & E-learning

Edtech apps will be developed toward providing a blend of in-person and live online learning experiences (e.g., Prisma, Outschool, Primer). Students can turn their homes into schools.

The E-learning industry is estimated to exceed \$1 trillion by 2027. The homeschooling startups we just covered are following the eLearning trend for K-12. Some colleges have started offering 100% online bachelor's degrees in recent years, and many more will come.

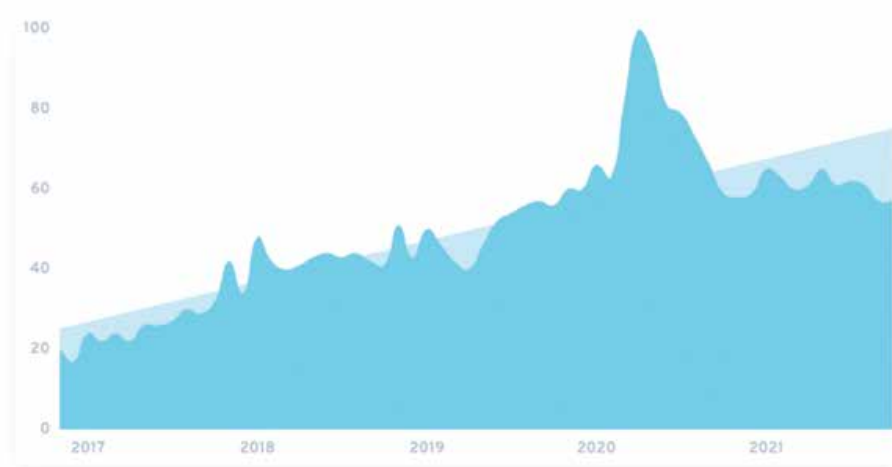


Figure 15: Udemy's search volume has increased by nearly 2x over the last 5 years.

2.3. AI-Enabled Adaptive Learning (And Admin)

Applying AI, digital learning interfaces can adapt to students' needs in real time, providing the lessons and exercises that are needed to fill in knowledge gaps and reinforce concepts.

3. Suggestions for empowering Edtech development in Vietnam

3.1. For investors

Invest in EdTech businesses, especially start-ups, with product concepts that match demand trends for SMS, LMS or CLS and ensure high competitiveness with free products exist. EdTech businesses will generally need investors, in addition to immense capital investment, market access, brand strategy implementation, communication and sales. The portfolio of EdTech products and services that can be invested in is remarkably diverse. Considering the national target programs on digital transformation in education, investors can see investment opportunities for specific products and services aimed at educational administrators, teachers and students.

Consider niche products as part of EdTech's holistic development strategy, and develop services that leverage open source and or low-cost technologies to add value to customers.

3.2. For organizations which use Edtech solutions



To develop the capacity to adapt and use modern technology in school management and leadership.

To train and build a team of teachers/training managers to meet the requirements of applying EdTech to schools/businesses to catch up with the trend of digital transformation in the field of education, training and development.

Research on the application of teaching and learning technology in a synchronous manner in all subjects instead of the spontaneous, fragmented and small-scale situation as the current situation in most schools.

To digitize the process and results of the assessment of teaching and learning to help teachers focus on their work and be freed from administrative and paperwork tasks such as making books, grade books, transcripts, and managing student learning records.

To upgrade facilities to meet the requirements of Edtech solutions.

To promote cooperation with businesses in general and Edtech businesses in particular, participate in the product co-creation to "personalize" Edtech products for the unit.

3.3. Suggestions for EdTech companies

Promote collaboration with educators to develop digital content (CLS) instead of focusing only on the platform. Involve educators in the product development process to create and develop innovative solutions that meet the needs of educators or learners.

3.4. Suggestions for Edtech policies

Financing

Financing: Policy regarding funding, shifting to output-based rather than input-based. For instance, the training program for teachers should base on the number of students that the teacher is technologically proficient and able to teach, rather than on the number of experts who teach them.

Switch to a policy regime based on actual needs, listen to businesses and schools about needs, challenges and difficulties to come up with appropriate policies to encourage domestic and foreign investors in the market.

To improve investment policies, creating favourable conditions for foreign investors to enter Vietnam – policies on property ownership, policies on the most favourable exit time for investors, policies incentives on crowdfunding, stock policies for startups.

Edtech network

The government should identify an official entity to take charge of Edtech related aspects, including a national vision for Edtech, implementation of Edtech policies, measuring its effectiveness. Having an official network for Edtech stakeholders to come together is also crucial. Edtech Village in Techfest has created the network that gathers Edtech stakeholders: Edtech startups, mentors, experts, investors, and government. That can be a foundation for the Edtech community in Vietnam to develop together.



CHAPTER IV

THE PARADIGM SHIFT

To be able to create a positive change in education and EDTech to contribute to that change, each component in the ecosystem, government, businesses, schools - organizations and individuals needs to change their thinking towards an innovation culture - together to create sustainable value to bring Vietnam to a knowledge economy.



CHAPTER V

EDTECH VILLAGE

TECHFEST VIETNAM

1. About Edtech village

Education Technology Village (Edtech) has the task of building and connecting Vietnam's educational technology ecosystem with international education ecosystems. After 6 years of establishment and development, Edtech Village has gathered many educational experts, businesses, investment funds, incubators, schools, etc. to consult, coordinate to deploy models, solutions in education digital transformation, smart education for ministries, branches and localities.

At Techfest 2021, the theme of Edtech Village is "Digital Transformation of Education: Challenges and Expectations", Edtech Village continues to deploy a series of diverse activities to help the education system of Vietnam and the world cooperate and sustainable connection in order to adapt and transform educational models and methods in the context of the complicated and prolonged Covid-19 epidemic.

2. Main activities of Edtech Village

Edtech village has the main activities as the following:

- Innovative Startup Competition for Education Technology Startups.
- Workshop on Educational Technology for K12 and Universities and Colleges.
- Edtech Proceedings 2021: Current status and trends of Edtech Vietnam; ranking of Edtech enterprises and organizations in Vietnam
- Investment and trade connection between Vietnamese and international businesses and investors.
- Virtual exhibition for Businesses and Startups to introduce solutions, models and products in the field of Educational Technology.

Edtech Village hopes to receive the support, cooperation and companionship of experts, businesses, investment funds, universities, etc., so that Vietnam's educational technology ecosystem will grow stronger and contribute to the success of the community. public of Techfest 2021.

3. Partners of Edtech Village 2021

About Edtech partners

TECHFEST VIETNAM 2021 | **ED** EDTECH VILLAGE

LÀNG CÔNG NGHỆ GIÁO DỤC VIỆT NAM 2021

Tại "Ngày hội khởi nghiệp đổi mới sáng tạo quốc gia Techfest 2021", Làng Công nghệ Giáo dục sẽ tổ chức chuỗi các hoạt động:

- Cuộc thi Khởi nghiệp đổi mới sáng tạo làng Công nghệ giáo dục
- Hội thảo trực tuyến "Chuyển đổi số giáo dục: Thách thức và Kỳ vọng" - 03/12/2021
- Triển lãm gian hàng ảo
- Kết nối thương mại đa phương - 04/12/2021
- Kỷ yếu song ngữ "Edtech Vietnam 2021: Looking back and forward" - 09/11/2021

QUÉT MÃ QR DƯỚI ĐÂY

KIEN GURU INTRODUCTION

Kien Guru is a pioneer e-learning app in Vietnam that brings technological advancements into teaching and learning, helping students from grades 1 to 12 study faster and more effectively through customized learning routes tailored to their specific needs. After two years of launching, Kien Guru has built an extensive library of learning materials with nearly 200,000 learning documents for all subjects and has become a comprehensive learning solution for more than 1.5 million Vietnamese students.

Kien Guru is a subsidiary company of Ruangguru, the most influential Indonesian educational technology start-up that had successfully expanded to Thailand and Vietnam. Ruangguru, which attracted more than 15 million users and 300,000 teachers, became one of the best learning applications in Asia.

The achievement of Kien Guru and Ruangguru is thanks to state-of-the-art technology. Kien Guru's AI system assesses students' capacity to request several grade-appropriate lessons. Besides, they can choose a learning path based on their demand and progress that best suit them.

Both students and various schools, teachers believed that Kien Guru provided students with several useful e-materials for their school works. Currently, the Kien Guru app is available on iOS, Android, and Desktop. It has a user-friendly interface and responsive technical support. Kien Guru is making an effort to complete our mission of providing a high-quality, approachable, and reasonable learning solution.

M.A. Hoang Ha Linh - CEO of Kien Guru Small Class Education Joint Stock Company.



CLASSIN INTRODUCTION

Founded in 2014, ClassIn is the virtual classroom platform, ranked Top 50 Global Edtech by GSV. In the belief that a class is not a meeting, ClassIn develops the teaching platform which simulates up to 90% of the traditional classroom. In and outside the lecture hall, the ClassIn software enables interactive tools, in-school social app, lesson scheduling, homework management, and school management dashboard, which start free and scale up to meet our customers' needs at any teaching stage.

Website: classin.com.vn

Phone: +84 969772193



4. Human resources of Edtech village 2021

Edtech village human resource



MSc. Do Nguyen Hung

Head of Education Technology Village TECHFEST 2021; Vice President of Hanoi Polytechnic College of Technology.

He is also the Village Head EDTECH TECHFEST VIETNAM 2019, 2020; an expert in developing a training and start-up support network at the NSSC National Center for Innovative Startup Support; and in charge of innovative start-up activities for students at Hanoi University of Industry Interior.



Mr. Pham Tuan Hiep

Co-head of Education Technology Village TECHFEST 2021; Incubation Director BK Holdings; Director of BK Fund.

He participated in 3 consecutive years of co-organizing the Edtech village at Techfest, organizing the implementation of 05 tasks of Project 844 and 02 missions of typical innovation projects of MOST such as BIPP, IPP2, Project 1665.



Assoc. Dr. Le Thi Thu Ha

Co-head of Education Technology Village TECHFEST 2021; Director of Innovation and Incubation Center at Foreign Trade University

Director of the FTU Innovation and Incubation Center (FIIS) of Foreign Trade University

Ability to train, consult, support and provide services on entrepreneurship, senior business lecturer, a consultant on Intellectual Property and Innovation



Mr. Nguyen Tri Hien

Co-Head of Education Technology Village TECHFEST 2021; CEO of Thien Ha Xanh Education Technology Joint Stock Company (GETjsc)

Education: Graduated with a Master of Information Technology in data integration in 2017.



Ms. Nguyen Hong Hanh

Execution team lead of Education Technology Village TECHFEST 2021; Founder and CEO at Edtech Agency JSC, the first and number 1 educational technology agency in Vietnam. Almost 20 years of experience in education.



MSc. Jen VuHuong

Author, Trainer and Coach; Community Program Manager of BK Holdings; Co-lead of Youth Village Techfest 2020, 2021.

10 years of experience in personal and leadership, entrepreneurship and innovation community development: leading Task 1 (Project 844, MOST), leading programs with UNESCO, UNWOMEN, AED-MPI.



Pham Trung Dung

Key member of Edtech Village Techfest 2020, 2021; VNU-CSK.

5. Contributors of Edtech Yearbook

Writers and Editors: Jen Vuhuong, Ms.Ha, Nguyen Hong Hanh
Translators: Long, Ha Minh
Designers: Tuan Anh, Duc Thang
Researchers: Kim Anh

List of secretaries and assistants

1. Bui Thi Nga	Secretary
2. Pham Ha Minh	Assistant
3. Tran Thi Vui	Assistant
4. Tran Hong Quan	Assistant
5. Nguyen Thi Kieu Ngan	Assistant
6. Tran Thi Kim Anh	Assistant
7. Pham Duc Thang	Assistant
8. Hoang Thuy Linh	Assistant

Experts support ranking

- 1 Mr. Ton Quang Cuong, Head of Faculty of Teacher Education, University of Education, VNU
- 2 Mr. Do Nguyen Hung, Lead of Edtech
- 3 Mr. Nguyen Tri Hien, Co-lead of Edtech, President of Edtech Agency
- 4 Mr. Pham Tuan Hiep, Co-lead of Edtech, Incubation Manager of BK Holdings, Manager of BK Fund
- 5 Ms. Jen Vu Huong, Community Program Manager of BK Holdings
- 6 Mr. Do Manh Hung, President of Nova Edu
- 7 Ms. Bui Thu Trang, CEO BHub
- 8 Ms. Nguyen Thi Thu Ha, Head of Data analysis Edtech Agency

ONLINE – MERGE – OFFLINE (OMO) CLASSROOM: EMBRACING THE FUTURE OF EDUCATION?

Prepared by ClassIn Vietnam

Forewords

As K12 students may soon go back to their traditional, in-person classroom, Vietnamese schools are still at the risk of temporarily shutting down again due to uncertainties of the pandemic. Thus, it is time for educators to consider how education will evolve and sustain post-COVID-19.

As can be seen, the boundary of online and offline is blurring thanks to the popularity of smartphones and Internet. Students can use their mobile phones to access the online content or submit the test while they are learning in the 'brick and mortar' classroom. So the online learning activities are merging with offline ones instead of two separate activities. With that insight, there is a reasonable basis to believe that hybrid learning affords a long-term and sustainable solution to quality education when it is done right.

As educators plan for the upcoming school year and beyond, hybrid learning will play a key part in the future of education. This article aims to provide an overview of what Online-Merge-Offline (OMO) classroom is, why it matters and how to build it

PART I: INTRODUCTION TO OMO CLASSROOMS

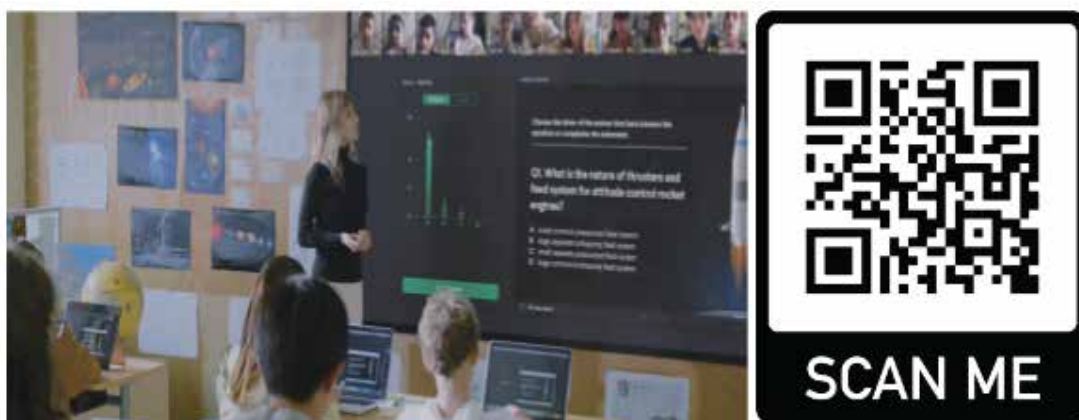


Image 1: OMO classroom

Note: Scan QR code to view the introduction video of OMO Classroom

OMO learning relies on hybrid infrastructure to merge online and offline (i.e., physical classrooms) learning spaces together in real-time while simultaneously seamlessly teaching students in both the physical classroom and online. Accordingly, at the same time, for the same lesson, students can go to offline classes at school or log in via computers to study online. Similarly, a teacher in Hanoi can even teach students in a physical classroom in Ca Mau. This creates an interactive and seamless learning experience no matter where the teacher or student is located.

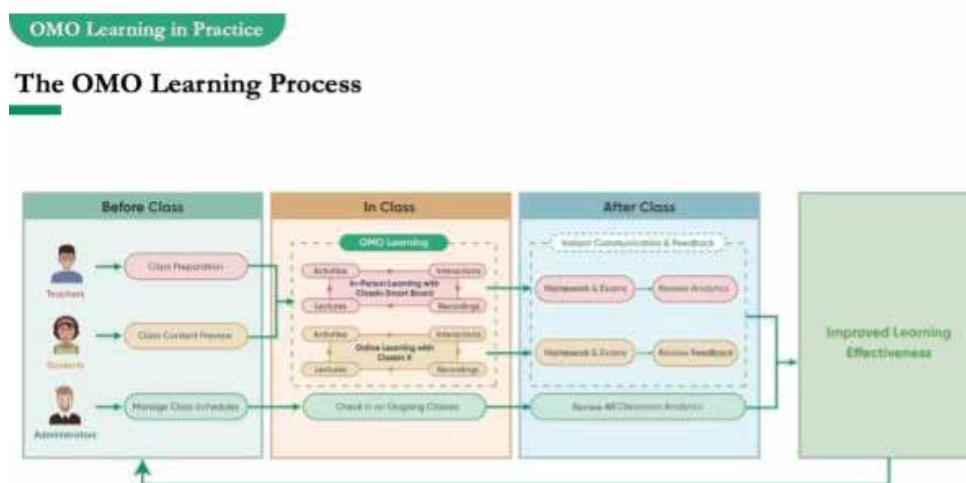


Image 2: OMO Learning Process

Thanks to the advancement of the professional virtual classroom technology like ClassIn, schools can create the environment which fosters the interaction and collaboration between online students and offline students via various teaching tools (e.g. live quizzes, test, assignment hand-out, real-time collaborative whiteboard, group discussion, reward trophies). Moreover, building and engaging the learning community in-class and after class is easy with integrated social features, built-in LMS. In addition, school admins can manage classes schedules, monitor on-going lessons, review learning analysis in one place.

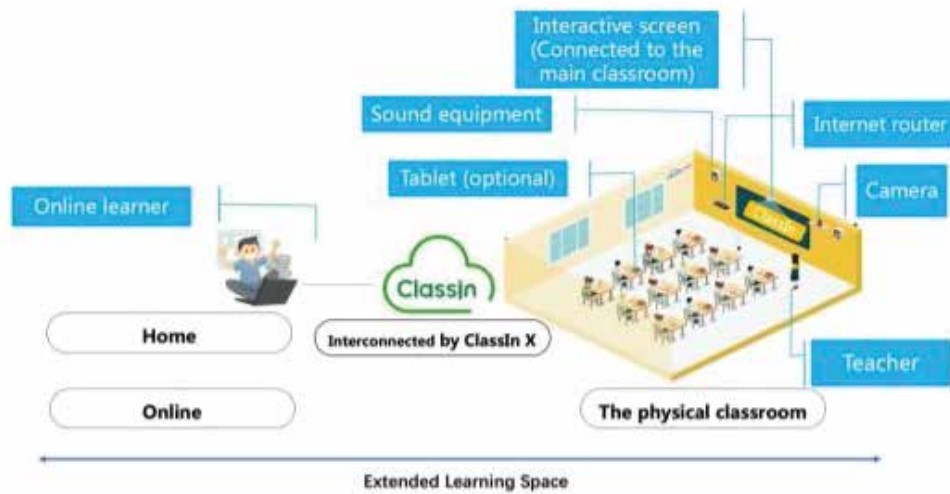


Image 3: The typical OMO Classroom design foregrounded by researchers



Image 4: Lennon showcases the classroom setup for OMO learning

With a wide variety of hybrid solutions on the market, identifying necessary and fitting hardware for hybrid classrooms can be an overwhelming process. With your budget and existing infrastructure in mind, administrators and educators can navigate the process based on pedagogies and class formats. Investigating an emerging method of hybrid learning that combines open educational practices and real-time learning spaces,¹ Online-Merge-Offline (OMO) learning,² international scholars outlined the hardware design for a typical OMO classroom:

¹ Ronghuai Huang, et al., "Emergence of the Online-Merge-Offline (OMO) Learning Wave in the Post-COVID-19 Era: A Pilot Study," Sustainability 13 (6), March 22, 2021, Sustainability 2021, 13(6), 3512; <https://doi.org/10.3390/su13063512> ² "Online-Merge-Offline (OMO) Learning: International Scholars Spearhead Research on a New Way to Learn," ClassIn Blog, May 13, 2021, <https://www.blog.classin.com/post/online-merge-of->

- (1) High-speed Internet availability to connect the online and offline learning spaces, where the online students log in using their ClassIn accounts to virtually join the physical classroom and interact with the in-person students;
- (2) Interactive boards where ClassIn is running, so that the teacher can use it to teach online and offline students at the same time;
- (3) Sound equipment, including omnidirectional microphones to capture and transmit the sound of students and teachers within the classroom;
- (4) Wide – angle cameras to transmit the classroom interactions for the online students;
- (5) Optional tablet computers that students can also use for different learning activities.

PART II: WHY OMO CLASSROOMS?

Although OMO classroom is still in its early stages, this model shows a lot of promise because it addresses different pain points in the existing education system.

1. *Expand the Reach of Education Resources*

- A good teacher can reach multiple classrooms anywhere, which helps to tackle the teacher shortage. It also opens opportunities for students from rural areas to study with teachers who they can never meet before.
- Multiple teachers can deliver a class collaboratively.
- Guest speakers can connect to classrooms around the globe.

2. *Ensure education continuity*

- Students who get sick are able to learn from home.
- It also decreases school absence rate due to extreme weather.

3. Accelerate the digitalization in education

- Instant access to any learning materials via cloud storage and LMS.
- Reduce workload for teachers via automatically grading homework and exams.
- Integrate online and offline learning data, and help educators gain insights to learning behaviors.

PART III: CASE STUDY: OMO CLASSROOM AT PEKING UNIVERSITY

Peking University is the leading research university in Beijing, China. It is regarded as one of the best universities in China and attracts talented students from around the country and the world. Peking University is ranked #18 in QS Global World Rankings 2022.

In 2021, PKU partnered with leading institutions from five continents to launch OMO Global Open Courses Program. The program gathers students from both home and abroad to learn online and in real-time six courses offered by PKU professors. Accordingly, students from Beijing joined physical classes while other international students joined online classes via ClassIn. Both online and offline students were encouraged to collaborate closely in group work, seamless discussion sessions during lessons.

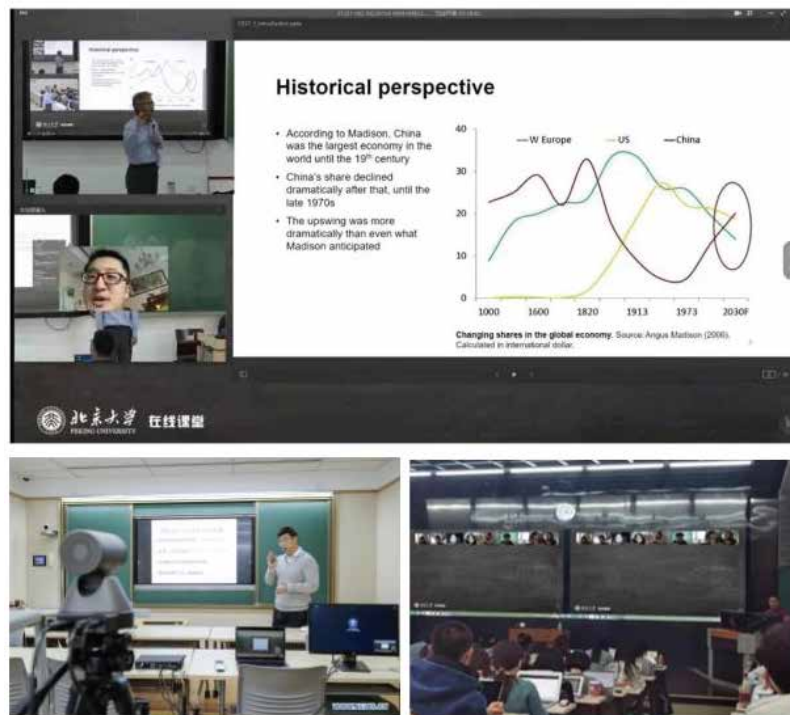


Image 5: OMO classrooms at PKU

Supported by ClassIn, the OMO learning method connects two or more classrooms at different locations, allowing schools to reach a larger pool of students and encourage interdisciplinary collaborations and in-class interactions.

CONCLUSION

It's clear education is facing a milestone event. Forward-thinking schools are rapidly modernizing their infrastructure, software, and processes to support the future of education. An investment in digital education should not be seen as replacing traditional learning, but rather as an important tool that enables innovation heading into the future. OMO classroom should be seen as a transformative approach that offers the best of both worlds.

LIST OF EDTECH INVESTORS

No.	Investors	Website
1.	BestB Capital	https://www.bestbcapital.com/vi
2.	Dragon Capital	https://www.dragoncapital.com/
3.	Vina Capital	https://wm.vinacapital.com/
4.	Forge Ventures	https://forge.vc/
5.	Venturra Discovery	https://www.venturra.com/
6.	iSeed Sea	https://iseed.asia/
7.	Wavemaker Partners	https://wavemaker.vc/
8.	Beacon Fund	https://beaconfund.com/
9.	Apax Holdings	http://apaxholdings.com.vn/
10.	Insignia Ventures Partners	https://www.insignia.vc/
11.	Kakao Ventures	https://www.kakao.vc/
12.	Altos	https://altos.vc/
13.	ESP Capital	https://www.espcapital.net/
14.	KKR Global Impact	https://www.kkr.com/businesses/global-impact

15.	A. Monk's Hill Ventures	https://www.monkshill.com/
16.	XA Network	https://xanetwork.co/
17.	Iterative	https://www.iterative.vc/
18.	Redefine Capital Fund	https://redefinecapitalpartners.com/
19.	Chiba Dojo	https://chiba-dojo.jp/
20.	Genesia Ventures	https://www.genesiaventures.com/en/top-en/
21.	Vietnam Investments Group	https://www.vigroup.com/en/index.htm
22.	SIG	https://sig-asiavc.com/
23.	Gradient Ventures	https://www.gradient.com/
24.	Touchstone Partners	https://touchstone.vc/
25.	Vulcan Capital	https://capital.vulcan.com/
26.	Pavilion Capital	http://www.pavilioncapital.com/

27.	MB Capital Fund	https://www.mbcapital.com.vn/vi/
28.	Viet Capital Asset Management	https://vietcapital.com.vn/en/
29.	Mekong capital	https://www.mekongcapital.com/vi
30.	IDG Ventures Vietnam	https://idgvv.com.vn/en/
31.	Vietnam Oman Investment	https://www.voi.vn/
32.	Vietnam Equity Holding	https://saigonam.com/fund-management/veh
33.	Fund VI (Vietnam Investments) Group	http://www.vigroup.com/en/index.htm
34.	CyberAgent Capital	https://www.cyberagentcapital.com/en/
35.	Capella Holdings	http://capella.com.vn/
36.	Softbank	https://www.softbank.jp/en/
37.	Startup Vietnam Foundation	https://svf.org.vn/
38.	NATIONAL START-UP INVESTMENT JOINT STOCK COMPANY	https://dautukhoinghiep.com/
39.	BK Holdings	http://www.bkholdings.com.vn/vn/
40.	Angles4us	http://www.angels4.us/
41.	Alpha Vision	https://www.alpha-vision.com/

42.	Intel capital	https://www.intel.com/content/www/us/en/intel-capital/overview.html
43.	Kusto Group	https://www.kustogroup.com/
44.	Patamar Capital	http://patamar.com/
45.	FPT Ventures	http://fptventures.com/
46.	Index Ventures	https://www.indexventures.com/
47.	SEAF	https://www.seaf.com/
48.	Patamar Capital	https://patamar.com/
49.	Kusto Vietnam	https://kusto.com.vn/
50.	Golden Gate Venture	https://www.goldengate.vc/

II. LIST OF EDTECH PARTNERS

No.	Partner	Website
1.	NSSC	https://nssc.gov.vn/
2.	Start-up Advisor	http://covankhoinghiep.vn/vuon-uom-khoi-nghiep/
3.	BK holdings	http://www.bkholdings.com.vn/
4.	Edxtech	https://vmcg.vn/vi-vn/pages/edxtech
5.	Gakken Holdings	https://ghd.gakken.co.jp/
6.	World bank group	https://www.worldbank.org/
7.	VNU-HCM Innovative Entrepreneurship Center (IEC)	https://iec.itp.vn/
8.	Saigon Hi-tech Park Incubation Center	http://www.shtp.hochiminhcity.gov.vn/
9.	Vietnam Silicon Valley (VSV)	http://www.siliconvalley.com.vn/
10.	Rehoboth Vietnam	https://rehobothvietnam.business.site/
11.	EDX GROUP CORPORATION	https://edxgroup.vn/
12.	Young business incubator	https://bssc.vn/
13.	SIU startUP	https://www.siu.edu.vn/vi-VN/tin-tuc-su-kien/siu-startup-vuon-uom-khoi-nghiep-cua-sinh-vien-dai-hoc-quoc-te-sai-gon/325/77159

14.	Hanoi Business Incubator	http://www.hbi.vn/
15.	Hanoi Innovative Business Incubator of Information Technology – HBI-IT	http://hanoistartup.vn/
16.	UII Incubation Program	https://uii.ueh.edu.vn/vuon-uom-iii/
17.	Vietnam startup support portal	https://khoinghienvietnam.org/
18.	Business Startup Support Centre - BSSC	https://bssc.vn/
19.	Software Industrial Park, National University - Ho Chi Minh City	https://itp.vn/vi/
20.	QTSC Incubator	https://2075.com.vn/vuon-uom-doanh-nghiep-cong-nghe-phan-mem-quang-trung/

III. LIST OF TYPICAL EDTECH

No.	EdTech product/company	Website
21.	Kickenglish	https://www.kickenglish.vn
22.	Kid topi	https://kidtopi.edu.vn/
23.	Wikilady	https://wikilady.vn
24.	AiTalk	https://aitalk.vn
25.	Rockit Online	https://rockit.vn
26.	Lika	https://hocsinh.lik.edu.vn
27.	popoky	http://popoky.com/vi/
28.	toppy	https://toppy.edu.vn/
29.	Ekid	https://ekidstudio.com/
30.	ABCKid	https://www.abckid.vn/
31.	Luyện thi 123	Luyenthithi123.com
32.	MIND SPA	https://mindspaeducn.wordpress.com/
33.	supper mind	http://www.supermind.edu.vn/
34.	luyen thi dai hoc 247	http://www.luyenthidaihoc247.com/
35.	mathlish	https://hoctoantienganh.com/
36.	Talenta	https://talenta.vn
37.	Tutorin	https://tutorin.edu.vn
38.	VIETJACK	https://www.vietjack.com/
39.	SMAS	https://smas.edu.vn/
40.	Moon	https://moon.vn

41.	Chiness.com	www.chinese.com.vn
42.	LAZI	https://lazi.vn/
43.	IIG	www.iigvietnam.com
44.	Mozabook	https://www.mozaweb.com
45.	Violympic	http://violympic.vn/
46.	Kienguru	https://www.kienguru.vn/
47.	Vungoi.vn	http://Vungoi.vn
48.	Unica	https://unica.vn
49.	Edu2Review	https://edu2review.com
50.	Tuyen sinh 247	https://tuyensinh247.com/
51.	Tienganh123	https://www.tienganh123.com
52.	Tflat	https://tienganhtflat.com
53.	Elsa	https://vn.elsaspeak.com/
54.	Học mãi	https://hocmai.vn
55.	6/7 TK	https://selfomy.com
56.	Tieng anh 124	https://www.tienganh123.com/
57.	Leerit	https://leerit.com
58.	Mona media	https://mona.media
59.	Unica	https://unica.vn/
60.	topica native	https://topicanative.edu.vn
61.	VNPT School	https://vnptschool.com.vn/
62.	Ladigi	www.ladigi.vn
63.	Yola	https://yola.vn/en/
64.	Hocmai.vn	hocmai.vn/
65.	Wall Street English	https://wallstreetenglish.edu.vn
66.	Edupia	https://edupia.vn/
67.	Kyna.vn	https://kyna.vn
68.	Ila	https://ila.edu.vn/
69.	Dekiru.vn	https://dekiru.vn
70.	Teky	https://teky.edu.vn/
71.	Kyna Kids	https://www.kynaforkids.vn/
72.	Học 247	https://hoc247.vn/
73.	Onluyen	https://www.onluyen.vn/
74.	Zuni	http://zuni.vn/
75.	Dekiru.vn	https://dekiru.vn
76.	hellochao	https://www.hellochao.vn
77.	Monkey Junior	https://www.monkeyjunior.vn/
78.	Kiddi hub	https://kiddihub.com/
79.	PACE	https://www.pace.edu.vn/

80.	EVEREST EDUCATION	https://e2.com.vn/vi/
81.	GOTIT	https://vn.got-it.ai/
82.	Monkey Junior	https://www.monkeyjunior.vn/
83.	Codehub	https://www.codehub.com.vn
84.	Gitiho	https://gitiho.com
85.	Akira	https://akira.edu.vn
86.	Edumall	https://edumall.vn
87.	Học thủ khoa	http://www.hocthukhoa.vn
88.	big school	https://bigschool.vn/
89.	Codegym	https://codegym.vn/
90.	big school	https://bigschool.vn
91.	Be native	https://benative.vn/
92.	Poki	http://www.poki.vn/
93.	BLACASA	https://www.blacasa.vn/
94.	hellochao	https://www.hellochao.vn
95.	Edubit	http://edubit.vn
96.	Alokiddy	https://alokiddy.com.vn
97.	Edunet	https://edunet.vn
98.	Monkey	https://www.monkey.edu.vn/
99.	KT city	https://kt.city
100.	789	https://www.789.vn/
101.	Hachium	https://hachium.com
102.	Testuru	https://testuru.com/vi
103.	Viettel Study	https://viettelstudy.vn
104.	Mclass	https://mclass.vn/
105.	Kids online	https://kidsonline.edu.vn/
106.	Master skills	https://www.masterskills.org/
107.	EMG	https://emg.vn/
108.	Enetviet	https://enetviet.com/
109.	Đại trường phát	https://www.dtp-education.com
110.	Azota	https://azota.vn
111.	Pododoo	https://popodoo.com.vn
112.	Biz uni	https://bizuni.vn
113.	Thinking school	https://thinkingschool.vn
114.	UNIACE	https://uniace.vn
115.	Antoree	https://antoree.com
116.	PTI	https://pti.edu.vn/
117.	OES	https://oes.vn
118.	CoderSchool	https://www.coderschool.vn/vi/

119.	Kanata	https://kanata.edu.vn
120.	MINDX	https://mindx.edu.vn
121.	Testbank	https://testbank.vn
122.	Goedu	https://edu.go.vn
123.	Tri Nam	https://trinam.com.vn/
124.	E study	www.e-study.vn
125.	top class	https://www.topclass.com.vn/
126.	Bachkim	bachkim.vn
127.	Miladi	www.miladi.com.vn
128.	Easy edu	https://easyedu.vn/
129.	Kohi	https://kohi.vn/
130.	OMT	https://omt.vn/vi/
131.	Code4Startup	https://code4startup.com/
132.	Tesse	https://tesse.io/
133.	Wewiin	https://wewiin.com
134.	MINDER	http://minder.vn/
135.	Alada	https://alada.vn/
136.	Vieted	https://vieted.com/
137.	Edu space	https://eduspace.vn
138.	Houston 124	https://houston123.edu.vn/
139.	Des.elearning	https://des.vn/
140.	AZABOOK	https://azabook.com/
141.	CAITIEDU	https://cati.edu.vn/
142.	agilearn	https://agilearn.vn/
143.	Hoola	https://hoola.vn
144.	one on one	https://1on1english.edu.vn/
145.	Clevai	https://clevai.edu.vn
146.	Edmicro	https://www.edmicro.vn
147.	Alada	https://alada.vn
148.	Kidy	https://kidy.vn
149.	Grab lingo	https://grablingo.com/
150.	GAiA	http://gaia.edu.vn/
151.	Edu box	http://edubox.vn
152.	EUP group	https://eupgroup.net
153.	talk english	http://talksenglish.com
154.	ASC	http://ascvn.com.vn/
155.	Touch English	http://touchenglish.vn/
156.	Bizapps	https://bizapps.vn/
157.	Study now	https://studynow.vn/

158.	Cudu	https://cuduapp.com
159.	Nova edu	https://novaedu.vn
160.	Point Avenue	https://www.pointavenue.com/
161.	PHAROS	https://pharos.vn/
162.	Edura	https://edura.vn/site/home_main
163.	Smarts school	https://www.phx-smartschool.com
164.	Nexus	https://diginexus.edu.vn
165.	OCG	https://ocg.vn
166.	BIT Learn	https://bitlearn.vn
167.	VINA Robot	https://vinarobots.com/
168.	Ky nang cho be	https://kynangchobe.vn/
169.	Giap School	https://giapschool.com/
170.	Yoot	https://yoot.vn
171.	Sunbot	http://sunbot.vn
172.	Huong Việt Elearning	https://avinasolutions.com
173.	AI edu	https://www.aiedu.com.vn
174.	AROMA	http://aroma.vn/
175.	NEXT EDU	http://nexedu.ileader.vn
176.	Kidsup	https://www.kidsup.edu.vn/
177.	Marathon Education	https://www.marathon.edu.vn
178.	Online 2 study	https://online2study.com
179.	Yotalk	https://yotalk.edu.vn/

