Department for Education

Assessment of the education technology market in England

Research report

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Authors: Martina Bolibruchova, Johnny Hugill, David Rayman, Eden Yitbarek

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Executive summary

1. Context and rationale

This research examines the current state of the Education Technology (EdTech) market in England. In this report, EdTech refers to the use of technology such as software, hardware and digital services in education. The widespread rise in the use of Artificial Intelligence (AI), alongside recent government policies and initiatives, such as the EdTech Testbed Programme and the EdTech Evidence Board, have underlined an evolution in how technology is used in schools.

The Department for Education (DfE) published a previous market assessment, The Education Technology Market in England (referred to throughout as the "2022 report"), which provided an initial overview of the EdTech market. In response to the more recent developments in the sector, the DfE commissioned PUBLIC to undertake new research to extend the analysis of the 2022 report.

Following up on the wider policy shifts and technological advancements, this report provides an updated picture of the EdTech market, particularly identifying major trends and shifts, to generate evidence-based insights to inform EdTech policymaking.

2. Methodological overview

This report uses a mixed-methods approach to summarise the size and composition of the UK EdTech market, understand both demand and supply-side perspectives, as well as the factors shaping how EdTech tools are adopted, and the key challenges and opportunities in the market. The following methodological approaches were employed to formulate insights for this report:

1. **Landscape review and gap analysis.** A total of 72 articles were reviewed in full. This evidence base informed the analytical framework for the study and enabled baseline comparisons with the 2022 report.

2. **Expert engagement through a Lived Experience Board.** Four experts from key areas of the sector, including EdTech procurement, local authority administration, EdTech consultancy and AI, provided ongoing input to test the research approach and validate emerging findings.

3. **Qualitative interviews with EdTech stakeholders.** The study included interviews with 58 stakeholders, comprising 20 schools, 24 EdTech suppliers and 14 sector experts. These interviews explored how technologies are developed, procured and used in practice.

4. **Quantitative analysis of EdTech company and school usage data.** Analysis of The Data City datasets enabled an up-to-date market assessment of more than 1000 companies. School usage data was also analysed to generate insights into patterns of EdTech adoption using EdTech Impact datasets.

Notes on inherent methodological limitations: There is no single database for UK EdTech companies or how schools use technology, and it was difficult to speak with schools directly due to their time and budget constraints. To address these limitations, the study triangulated findings across multiple methods and sources, including stakeholder interviews, expert knowledge, EdTech tool usage data from EdTech Impact, and insights gathered through attendance at sector events and roundtables such as Bett UK and EdTech Hubs Summit.

3. Findings

Building on the 2022 report, this study uses new data, new approaches, and additional analysis. It is designed to be read as a standalone analysis of the EdTech market, with comparisons included where relevant.

Supply side: Market size and composition

The UK EdTech market comprises **1,123 companies,** employing between **29,660 and 39,100** people, generating approximately **£6.5bn** in annual turnover, with an average annual growth rate of **8.8%** and **£782m** in annual investment.

To reflect sector complexity, this report adopts a 'verticals and horizontals' framework. The seven core verticals are **foundational learning, personalised learning, immersive and experiential learning, assistive and inclusive learning, management and administrative efficiency, assessment technologies, and EdTech hardware**. Horizontals capture enabling capabilities such as **AI and machine learning, cybersecurity and data privacy, accessibility, cloud infrastructure and interoperability**. Many firms operate across multiple verticals.

Market activity is concentrated in three large verticals:

- **Foundational learning** is the largest vertical by number of companies, employment and turnover, with **446 companies, 20,203 employees and £2.6bn in revenue**, alongside growth of **around 9% annually**.
- **EdTech hardware** also represents a substantial share of the market, with **390 companies generating £2.48bn in turnover** and growth broadly in line with the market average (**8.8%**).

- **Management and administrative efficiency technologies** account for **148 companies, more than 5,200 employees and £1.39bn in turnover**, supported by investment of **£219m**.

Differences are evident across the four remaining smaller verticals in terms of scale, growth and investment:

- **Assessment technologies** comprise **71 companies employing 2,705 people**, generate **£470m in turnover**, and record the highest growth rate in the sector (**18.1%**), while receiving **£24.3m in investment**.
- **Personalised learning** includes **74 companies and 513 employees**, generates **£77m in turnover**, records the lowest growth (**3.1%**), and receives **£187m in investment**.
- **Assistive and inclusive technologies** include **80 companies employing 588 people**, generate **£96m in turnover**, and receive the lowest investment (**£8.6m**).
- **Immersive and experiential learning** comprises **215 companies employing 1,426 people**, generates **£287m in turnover**, records growth of **around 7%,** and receives **£158m in investment**.

Building on this market analysis, the research identifies three key market dynamics.

1. **Core content platforms (446 companies) and EdTech hardware (390 companies) remain the largest verticals, generating £2.6bn and £2.48bn in turnover respectively**. However, growth in foundational tools is moderating as investment shifts towards specialised AI solutions, and general-purpose AI may reduce the competitive advantage of legacy platforms.
2. **Assessment technologies are the fastest-growing vertical, with annual growth of around 18%, despite contributing £470m in turnover.** Growth appears to be driven by immediate school demand to reduce workload and improve efficiency, while investment remains relatively low at £24.3m.
3. **A gap is also emerging between revenue generation and investment flows.** Personalised learning attracted £187m in investment despite generating £77m in turnover, suggesting investor expectations of future AI-driven demand. In contrast, assistive and inclusive technologies generated £96m in revenue but received only £8.6m in investment, while non-profit organisations continue to support access and innovation where commercial incentives are weaker.

Demand side: Use of EdTech in schools

Reliable evidence on how EdTech is used in practice in schools and colleges remains limited. To address this gap, this research analysed granular usage data from EdTech

Impact across a sample of schools within a large MAT, offering insight into real-world engagement with EdTech tools.

- **Management and administrative technologies show the highest and most consistent usage, reflecting their role as core operational infrastructure.** Among these, 35% of sampled schools in the MAT report using the cloud-based Management Information System (MIS), Arbor MIS. Workflow tools are also widely adopted, with 40% of schools using SalamanderSoft and 35% using recruitment platforms such as MyNewTerm, indicating broad uptake of digital process automation.

- **Classroom and assessment tools represent the second-highest area of engagement**. Exampro shows strong cross-departmental adoption, with multiple contracts often held within the same school, while content platforms such as Kerboodle, Twinkl and White Rose Education are widely used to support lesson delivery and reduce planning workload. Inclusive and safeguarding technologies show more targeted adoption, with Widgit contracted in 11% of schools and CPOMS in 19%.

EdTech usage patterns

- **Usage patterns differ across tool types and market verticals.** Management and administrative technologies show the most consistent engagement, reflecting their role in core school operations, while foundational learning platforms generate the highest volume of student use. Assessment technologies show cyclical spikes during assessment periods, indicating increasing functional specialisation.

- **Session intensity also varies.** Gamified tools are typically used in short bursts, while core instructional platforms support sustained engagement of up to an hour. Personalised learning tools are often used independently outside teaching hours, and assistive technologies show targeted but consistent adoption as essential accessibility support.

In addition to usage insights from EdTech Impact data, qualitative evidence indicates that adoption is concentrated around a small group of widely used tools. Schools report rapid uptake of general-purpose GenAI platforms such as ChatGPT and Claude to support lesson planning and administrative tasks, alongside continued reliance on classroom tools such as Canva and Kahoot!, and specialist platforms like Earwig for assessment and reporting.

4. The EdTech implementation journey and barriers

Interviews with schools, suppliers and sector experts indicate that EdTech adoption can be broken down to eight common stages, with inconsistent approaches across schools. While

many barriers cut across multiple stages, the report also identifies the most prominent challenges at each point in the process.

Across the journey, four system-level constraints shape how effectively schools can select, adopt and sustain the use of technology.

- **Strategic capability gaps affect early stages such as identifying needs and assessing suitable tools.** Schools report limited capacity for long-term planning, varying levels of digital and AI literacy, and reliance on informal sources of evidence when navigating a rapidly evolving market.
- **Resource and prioritisation pressures influence decision-making and piloting.** Competing operational demands, uneven access to technical support and limited time for staff training can constrain opportunities to test tools effectively before wider adoption.
- **Procurement and infrastructure constraints shape access and deployment.** Budget limitations, complex compliance requirements and differences in digital maturity affect how smoothly tools can be procured, implemented and integrated into everyday practice.
- **Sustained adoption and impact measurement challenges emerge in later stages.** Leadership engagement, curriculum alignment and protected time for professional development are critical for embedding use, while limited evaluation frameworks and inconsistent data from suppliers make it difficult to assess long-term impact.

5. Recommendations

This report sets out actionable steps to strengthen the EdTech ecosystem across investment, adoption, evidence and community. It focuses on creating clearer market conditions, enabling faster adoption of effective tools, strengthening the evidence base, and supporting stronger collaboration across the system.

A note on how tools are referenced in this report

The tools referenced throughout this report were identified through the different workstreams including interviews with schools and experts and usage data drawn from the MAT school sample. Where tools are named or appear in ranked order, this reflects the frequency with which they were mentioned or recorded in use. This is not an assessment of their effectiveness, pedagogical value, or safety.

This report does not evaluate whether any named tool is appropriate for use in schools, nor does it make any judgement on the quality of outcomes associated with its use. The

presence of a tool in this report should not be interpreted as an endorsement by the Department for Education or PUBLIC.

The sole purpose of naming and ordering tools here is to present an accurate picture of what is currently in use, as reported and evidenced within this sample.

1. Introduction

1.1 Context and rationale

In her speech at the 2025 Bett Show, the Education Secretary discussed the potential of a 'new, exciting wave of technology to drive high and rising standards as a modernising force across education'. The Education Technology ('EdTech') sector is at a critical inflexion point, with a significant amount of interest in the role of technology in education across government, schools and industry. This is not new: adoption of EdTech has been growing across schools, especially in response to changing education requirements created by the COVID-19 pandemic and the need for more remote learning. Since then, the sector has continued to develop. Most notably, there have been recent advances in Artificial Intelligence (AI).[1]

However, effective and consistent use of technology remains uneven. While this report finds that digital tools are widely used for administration and are increasingly integrated into teaching, many schools report limited staff confidence and training, difficulties in assessing the impact of technology on learning outcomes, ongoing concerns about cybersecurity, and uncertainty about how to plan and invest in EdTech effectively. These challenges are intensified by the rapid adoption of emerging technologies such as Generative AI (GenAI)[2].

At the same time, the current market environment has produced more discerning buyers who increasingly demand clear evidence of impact from a growing yet fragmented supplier base of over 1,000 companies. Suppliers, in turn, face their own challenges with funding and long, complex procurement cycles. To support adoption in such a complex and hard-to-evaluate sector, the Department for Education (DfE) has launched various initiatives, including the recently expanded EdTech Testbed Programme, which aims to build real-world evidence on the implementation, effectiveness and scalability of selected EdTech products in school settings. This sits alongside the EdTech Evidence Board, an independent advisory group established to review evidence submitted by EdTech suppliers, strengthen the evidence base for education technology and provide guidance on what works. Furthermore, the Assistive Technology (AT) 'lending library' pilot will allow up to 3,800 mainstream settings in participating areas to borrow technology and "try before they buy", enabling them to understand what works before investing and helping to build staff confidence and capability.

In light of the above, this research aims to examine the current state of the EdTech market in England. It builds directly on a similar DfE market assessment report titled, The Education Technology Market in England (hereafter referred to as 'the 2022 report'),

[1] AI is a technology that enables computers and machines to carry out tasks that normally require human intelligence, including learning, reasoning, problem solving, and decision making.

[2] GenAI is specialised subset of AI focused on *creating* new content (text, images, code) rather than just analysing or classifying existing data.

extending it through new data, deeper analysis, and practical insights from the field. The section below summarises the 2022 report baselines and motivation for the update.

The following definition of EdTech is used to guide this report:

EdTech refers to the use of technology to support and enhance education. This includes software, hardware, and digital services designed to improve the learning experience for pupils, reduce workload for staff, and improve the efficiency of operations.

1.1.1 Overview of the 2022 EdTech Market report

Key findings and scope

Before outlining the methods and findings of this report, this section summarises the 2022 report, on which the current research builds.

The main purpose of the 2022 report was to provide a clear picture of the EdTech market in England. It drew on several strands of work, including website analysis, interviews, and a review of existing research. The study looked at both demand (how schools use EdTech) and supply (the companies and products available).

It defined EdTech broadly to include learning software and applications as well as hardware and devices, services, school management systems, tools for parents and pupils and resources for Special Educational Needs and Disabilities (SEND).

Segments of the EdTech market

The 2022 report categorised the market into 7 market segments:

1. Class-aid or educator support
2. Digital learning product or content
3. Hardware and devices
4. Resources for parents or pupils
5. School management
6. SEND resources
7. Services

Evidence from the 2022 report indicated that EdTech uptake increased following pandemic-related disruption. However, the report noted that adoption remained uneven across the school system. While some schools had embraced new technologies, others continued to adopt a more cautious approach. Levels of adoption were influenced by several factors, including **senior leadership attitudes, budget constraints, available resources and perceived benefits and impact.**

The 2022 report highlighted some gaps and future priorities, which included the need for more interoperable and multifunctional tools, improved assessment and SEND solutions,

more robust monitoring, safeguarding data protection, and better support for decision-making and implementation.

Motivation for an update of the 2022 report

Since 2022, there has been a significant change both in the technology landscape and in schools' experience of digital learning. Some notable trends include:

- **The rise of AI, GenAI and advanced adaptive learning tools**: these technologies were not yet mainstream in 2022. For instance, the 2022 report did not cover the widespread use of GenAI content creation tools, AI-powered learning analytics, or tools for automated marking and feedback. These now represent significant market verticals.

- **Evolving hardware and infrastructure demands**: this was already flagged as a trend in the 2022 report, including changing costs and capabilities of hardware like laptops, tablets and virtual reality devices.

- **Market change, maturation and consolidation**: the 2022 report numbers may no longer reflect the reality today, especially considering market expansion and wider technology sector trends.

- **Changing policy context and demand**: post-pandemic policy and investment priorities in England have increasingly focused on digital support for SEND, as seen through the DfE's assistive technology training mandate for all new teachers and school lending library pilot, as well as infrastructure equity of access, reflected in a £45 million connectivity investment and digital standards targeting all schools by 2030, and pupil wellbeing, building on evidence of the digital divide and the need to tailor provision for diverse learners, as reinforced by the government's Digital Inclusion Action Plan identifying 3.8 million people as lacking basic digital skills.

1.2 Purpose and objective

Given the context of change since the previous report, the DfE commissioned PUBLIC to conduct a study advancing the analysis of the 2022 report. This report provides a robust, updated assessment of the EdTech market in England that:

- Provides an updated EdTech market assessment, identifying major trends and shifts since the 2022 report;
- Informs evidence-based policy and decision-making;
- Shapes future support models for schools and suppliers; and
- Identifies how the DfE can act as an enabler of innovation across the sector.

Below is a summary of the overarching objectives and research questions:

Objective 1: Develop an updated EdTech market assessment

1. How has the EdTech market changed since the DfE's 2022 assessment?
2. What have been the major shifts and trends in the EdTech market since the DfE's 2022 assessment, and are these likely to continue?
3. Which are the most popular EdTech tools used in schools across market segments, and how does this vary by subject area and key stage?
4. How do schools select EdTech products, and what constitutes a high-quality product from their perspective? How does this vary across schools and contexts (e.g., digital capability, training, and support)?
5. How is school purchasing behaviour influencing market dynamics?
6. What are the barriers that stop schools from adopting EdTech?

Objective 2: Identify key opportunities for supporting innovation in the sector

1. Which EdTech companies (start-ups, SMEs, or large corporations) are most influential in driving innovation, and why?
2. What are the key pathways to developing high-quality, innovative EdTech products?
3. What common barriers prevent innovative companies from thriving in England's EdTech market?
4. How might the government better support domestic EdTech research and development?
5. What developments in the education landscape could change market requirements and drive innovation (e.g., data sharing, digital assessments, GenAI)?

2. Methodology

2.1 Overview

While this report focuses on the current EdTech market, it also considers the wider factors shaping how these tools are adopted. This includes both the challenges and opportunities affecting their use across the education systems.

To build a robust evidence base, the research combined four complementary workstreams that together provide both supply-side and demand-side perspectives on the EdTech ecosystem:

1. Landscape review and gap analysis
2. Expert engagement through a 'Lived Experience Board'
3. Qualitative interviews with EdTech stakeholders
4. Quantitative analysis of EdTech company and school usage data

In addition to the workstreams above, the research incorporated testing and feedback workshops throughout the synthesis process and engagement with sector events, including Bett UK, the EdTech Hubs Summit and other roundtable events with education and technology stakeholders. These activities provided additional insight into emerging priorities across the sector and helped validate findings through triangulation across multiple evidence sources. A detailed explanation of the methods and analytical approach is provided in Appendix 1.

2.1.1 Landscape review and gap analysis

The research began with a landscape review and 'gap and change' analysis examining how the EdTech sector has evolved since 2022. The 2022 report was used as an evidence baseline, particularly its discussion of future priorities and gaps in the market. This allowed the study to identify technological, policy, and market developments shaping the sector.

A structured search strategy was used to identify academic literature, policy publications, industry reports, and grey literature relating to EdTech in England. Searches were conducted across academic databases, government publications, and sector sources, supplemented by snowball searches of references and citations from key documents.

The search identified **138 potentially relevant sources**. After removing duplicates and screening titles and abstracts against predefined criteria (including publication date, geographic relevance, and sector focus), **72 sources were reviewed in full**, resulting in **60 sources included** in the final landscape review.

The resulting evidence base informed the analytical framework for the study and helped identify key themes explored through stakeholder engagement and quantitative analysis.

Further methodological details, including the search syntax, databases used, and inclusion and exclusion criteria, are provided in Appendix 1.1.

2.1.2 Interviews with the expert 'Lived Experience Board'

To complement the desk research and provide practitioner validation of emerging findings, the project established an expert's 'Lived Experience Board'. The Board was designed to ensure that the analysis remained grounded in real-world experience of the EdTech ecosystem and to provide ongoing feedback throughout the project.

The Board consisted of **four experts** with complementary expertise across key areas of the sector, including EdTech procurement, local authority administration, EdTech consultancy and AI. Between **September 2025 and January 2026**, a series of semi-structured workshops was conducted with Board members. These sessions were used to review emerging findings, test interpretations, and identify gaps or areas requiring further investigation. Further details on the composition of the Board and discussion topics are provided in Appendix 1.2.

2.1.3 Qualitative research with EdTech stakeholders

To complement the desk research and expert engagement, qualitative interviews were conducted with stakeholders across the EdTech ecosystem to capture a range of perspectives on how technologies are developed, procured, and used in practice.

First, a stakeholder map of **100 potential participants** was developed, from which **70 key contacts** were prioritised for engagement. Recruitment was conducted through a combination of existing networks, referrals from interviewees, engagement at sector events, and direct outreach.

In total, **58 stakeholders participated in the research**, comprising **20 schools and trusts**, **24 EdTech suppliers**, and **14 sector experts**. Demand-side participants included educators, school leaders, and sector representatives, while supply-side participants included company directors, developers, product managers, sales leads, procurement specialists, investors, and organisations supporting the EdTech ecosystem.

Interviews explored topics including changes in the EdTech market since 2022, barriers to adoption in schools, procurement and decision-making practices, and the implications of emerging technologies such as AI.

Further information on stakeholder sampling, interview design, and analytical procedures is provided in Appendix 1.3.

2.1.4 Quantitative analysis of EdTech company and school usage data

The fourth workstream combined two methods of quantitative analysis to examine both the structure of the EdTech market and patterns of technology use in schools.

First, an updated EdTech taxonomy was developed to classify technologies operating within the sector. Building on the framework used in the 2022 report, the revised taxonomy adopts a '**verticals' and 'horizontals'** structure to reflect structural shifts in the market. This approach replaces the 2022 terminology of 'market segments' with a framework that distinguishes between specialised application areas (verticals) and enabling technologies that cut across them (horizontals). Further details on the taxonomy and the rationale for this revised classification are provided in Section 3.1.1.

This taxonomy was applied to a database of EdTech companies constructed using data from The Data City, which identifies firms through Real-Time Industrial Classifications (RTICs), based on company websites and financial filings. The initial dataset included over 1,000 companies operating in the UK EdTech sector and was enriched and verified using additional industry sources such as market reports, supplier directories, and event exhibitor lists. This enabled analysis of the sector's size, employment profile, and economic contribution across the taxonomy. Where available, England-specific data is highlighted within the findings: however, market data in this report is presented primarily at the UK level. The methodological rationale for this approach is set out in Appendix 1.4.

To complement the supply-side analysis, the taxonomy was tested against real-world school usage data provided by EdTech Impact, a data platform that gathers school feedback and evaluations on EdTech from users. Usage patterns were analysed across EdTech verticals to identify the most frequently used categories of tools. To allow comparison across platforms with different adoption levels, engagement was normalised using an average usage per pupil metric.

Together, these datasets enabled comparison between market supply and real-world school adoption, providing empirical insight into how different categories of EdTech tools are embedded in school practice. Further methodological details are provided in Appendix 1.4.

3. Findings

The landscape review and gap analysis, which used the findings of the 2022 report as a baseline, examined six themes: administrative and monitoring tools, assessment, value-added products, SEND support, safeguarding and cybersecurity, and infrastructure. The analysis found that although each area has seen some development, progress has been uneven and structural gaps persist across each. These findings informed the focus and direction of this research. Further details can be found in Table 11 in Appendix 2.

Insights from each workstream were synthesised and structured around two overarching perspectives: **the supply side and the demand side of the market**.

The supply-side analysis focuses on the structure and characteristics of the market. This includes an assessment of overall market size and composition, as well as an updated segmentation and taxonomy to reflect current market dynamics. The demand-side analysis examines the perspective of schools and education providers. It revisits the concept of school digital maturity and explores how this influences engagement with EdTech. This section also presents findings from the quantitative analysis of school usage. Finally, the demand-side analysis considers the EdTech implementation journey, highlighting key barriers to adoption alongside emerging opportunities.

3.1 Supply side: Market size and composition

This section presents a quantitative analysis of the UK EdTech market in the 2025 calendar year. Drawing on The Data City's Real-Time Industrial Classifications (RTICs), a methodology for categorising companies based on real-time digital signals, alongside financial data, it maps the size, health, and trajectory of the sector.

3.1.1 Updated taxonomy and segmentation

As described in Section 1.1.1, the 2022 report used the term 'market segments' to describe the categories in the taxonomy. The 2025 report replaces this terminology with a 'verticals and horizontals' framework to better reflect the complexity of the sector.

Within this framework, verticals represent specialised application areas. The sector is organised into seven verticals: **Foundational learning, Personalised learning, Immersive and experiential learning, Assistive and inclusive learning, Management and administrative efficiency, Assessment technologies, and EdTech hardware**. Table 1 presents the 2025 EdTech taxonomy, outlining the main vertical categories and the inclusion and exclusion criteria used to classify different types of solutions. Horizontal categories capture enabling technologies that cut across multiple domains. Five horizontals are identified, representing foundational technologies that shape the ecosystem (see Table 3). Further details on the methodology behind the taxonomy and classification approach are provided in Appendix 1.4**.**

Table 1: Updated 2025 EdTech taxonomy outlining key vertical categories with corresponding inclusion and exclusion criteria

Vertical	Foundational learning	Personalised learning	Immersive and experiential learning	Assistive and inclusive learning	Management and administrative efficiency	Assessment technologies	EdTech hardware
Inclusion criteria	Solutions focused on foundational content delivery, core digital infrastructure, online course hosting, and content repositories.	Solutions that use AI to dynamically personalise the learning experience (adjusting pace or content) or to reduce educator workload through automation of pedagogical tasks.	Technologies that facilitate high-engagement, hands-on training, and learning through simulated or enhanced reality environments, with a focus on improving retention.	Solutions specifically aimed at addressing diverse learning needs, closing the digital divide, improving accessibility, platforms for mental health/well-being.	Solutions designed to streamline institutional operations and reduce the human workload associated with organisational tasks.	Automated marking systems, assessment platforms, diagnostic testing software, and exam management systems.	Solutions where the physical device itself is the primary tool for learning or content creation (e.g., coding robots, interactive whiteboards, VR[3] headsets, 3D printers. Hardware with specialised use in education.
Exclusion criteria	Does not include tools whose primary function is adaptive learning, personalisation via AI, or the use of immersive technologies.	Technologies where AI is used solely for institutional management or general AI tools.	Standard 2D video content or non-interactive digital content.	Generic digital tools that have general accessibility features but are not primarily designed as specialised assistive/inclusive solutions.	Tools whose primary strategic focus is on the direct delivery of learning content or personalised student support.	Simple gradebooks or basic student reporting features housed within a school management information system (MIS).	Standard consumer electronics (laptops, tablets, desktop PCs), where the educational value is derived solely from the software installed. Also standard printers, keyboards

[3] Virtual reality (VR) technology creates immersive three-dimensional simulations in which users interact with environments using specialised equipment such as headsets and sensor-fitted gloves.

Table 2 below shows the main changes between the 2022 and 2025 EdTech market taxonomies and the rationale for these updates. These adjustments ensure that the 2025 taxonomy remains aligned with current technological capabilities and institutional needs. Notable changes include the decision to isolate Personalised learning to better track the growth of AI tools. This approach also expanded SEND resources into the broader category of Assistive and inclusive learning to focus on accessibility and well-being.

Table 2: Key changes between the 2022 and 2025 EdTech taxonomies

2022 taxonomy	2025 taxonomy	Key changes and rationale
Class aid or educator support / Digital learning product or content / Resources for parents or pupils	**Foundational learning**	Merges all general learning content, such as VLEs[4], LMS[5], and basic digital textbooks, into a single category. This removes ambiguity caused by overlapping categories (e.g. e-learning tools used by teachers in-class vs. parents at home).
Previously not included	**Personalised learning**	Separates adaptive, personalised, and AI-driven pedagogical tools from the broad 2022 'Digital learning product or content' vertical. This isolates the high-growth market vertical driven by algorithmic personalisation, which was not distinct in the 2022 taxonomy.
Previously included in 'Hardware'	**Immersive and experiential learning**	Separates content, software, and simulation intellectual property from the hardware needed to run them.
School management	**Management and administrative efficiency**	Clarifies the focus on efficiency and the automation of routine operations (MIS, timetabling, HR).
SEND resources	**Assistive and inclusive learning**	Broadens the focus from strictly SEND compliance to include accessibility standards, and student well-being (including mental health platforms).

[4] A Virtual Learning Environment (VLE) is an online system that allows teachers and trainers to share educational materials and communicate with their learners via the web. Usually with built in tools to create engaging learning content.

[5] A Learning Management Systems (LMS) is a software application that helps organizations administer, document, track, report, automate, and deliver educational courses, training programs, or learning and development programs.

2022 taxonomy	2025 taxonomy	Key changes and rationale
Hardware and devices	**EdTech hardware**	Isolates the market for educational physical devices, such as interactive panels, robotics kits, and dedicated headsets, as well as hardware with specialised use in the education sector. This vertical is defined solely by the physical product, ensuring that software intellectual property is not conflated with expenditure on hardware.
Previously included in 'School Management'	**Assessment technologies**	Recognises that AI-driven marking, real-time analytics, and objective assessment tools have grown into a distinct category.
Services	**Excluded**	Removed as it represents an economic layer (training, support) around a technology product. While crucial, these services are secondary to the EdTech product itself.

Table 3 below shows the five key horizontal technologies identified in the 2025 EdTech taxonomy, representing foundational technologies that shape the ecosystem and their role within it.

Table 3: Identified EdTech market horizontals in the 2025 taxonomy

2025 horizontal	Definition and rationale
AI and Machine Learning (ML)	The underlying models, APIs[6], and frameworks (e.g. LLMs[7]) that power specialised applications such as personalisation or automated assessment.
Cybersecurity and data privacy	Essential technologies for securing sensitive student data, managing access, and ensuring GDPR compliance[8], which is a critical priority for Trust leaders.
Accessibility	Standards and tools (e.g. WCAG compliance[9]) that ensure products are inclusive by design, rather than treating access as a retrofit.
Cloud infrastructure	The utility layer (Azure, Google Cloud) that provides the computing power and storage necessary to run scalable EdTech applications.
Interoperability	The ability of disparate systems (VLEs, apps) to exchange data securely, preventing data silos and reducing administrative friction.

3.1.2 Updated market sizing

The 2025 market analysis identifies that the EdTech sector has grown and matured since the 2022 baseline. Table 4 below shows key market metrics for UK EdTech companies across each vertical.

6 Application programming interface (API) is a set of rules or protocols that enables software applications to communicate with each other to exchange data, features and functionality.

7 Large language models (LLMs) are advanced AI systems that understand and generate natural language, or human-like text, using the data they've been trained on through machine learning techniques.

8 General Data Protection Regulation (GDPR) compliance refers to adhering to the regulations set forth in the GDPR. The GDPR is a legal framework established by the European Union to ensure the privacy and protection of personal data.

9 The Web Content Accessibility Guidelines (WCAG) are a list of criteria your website or mobile application need to meet in order to be legally compliant.

Table 4: Key UK EdTech market metrics by vertical, including the number of UK-based companies, total UK employees, annual turnover, annual growth rate, and annual investment

	Number of UK-based companies	Total UK employees	Annual turnover (£m)	Annual growth rate	Annual investment (£m)
Foundational learning	446	20,203	£2,624	9%	£367.7
Personalised learning	74	513	£77	3.1%	£187
Immersive and experiential learning	215	1,426	£287	7%	£158.1
Management and administrative efficiency	148	5,244	£1,394	8.1%	£219
Assistive and inclusive learning	80	588	£96	7.4%	£8.6
Assessment technologies	71	2,705	£470	18.1%	£24.3
EdTech hardware	390	4,148	£2,480	8.8%	£132.5
Overall UK data	**1,123**	**29,660 - 39,100**	**£6,517**	**8.8%**	**£782m**
England-level data	**1,092**	**27,012**	**£5,930**	**9.3%**	**£776m**

Source: The Data City, February 2026

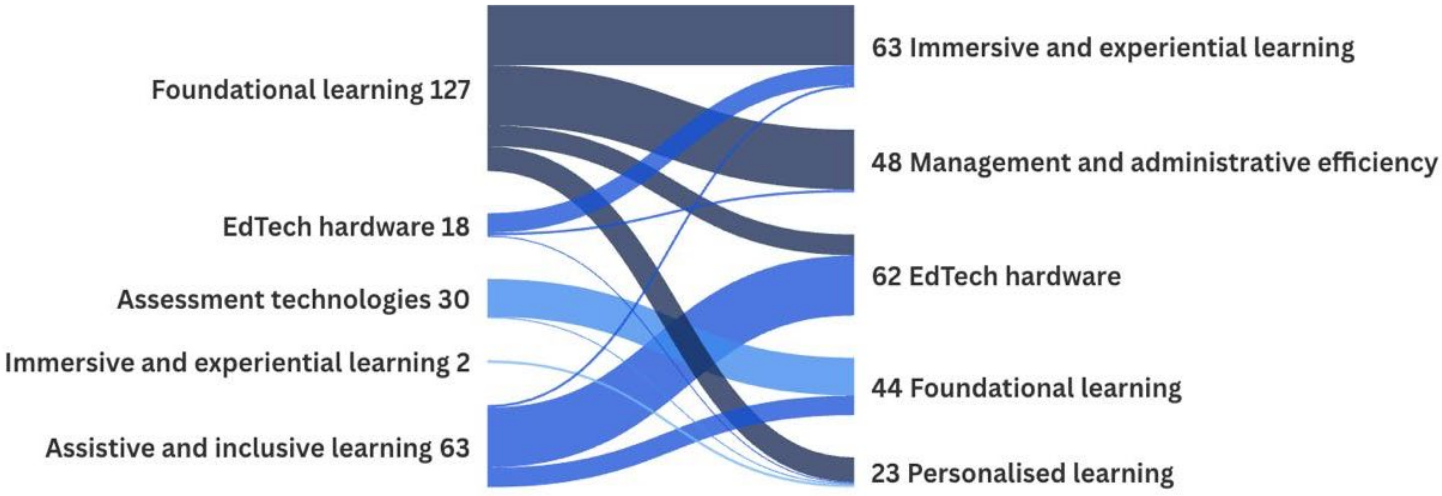
Note: Data presented at UK level unless otherwise stated. England-level figures are provided for reference. See Appendix 1.4 for methodological rationale.

To accurately represent the scale of specific market verticals, companies have been assigned to multiple verticals where their product offering spans different functional areas. Please see Appendix 1.1.4.1 for a detailed explanation and rationale.

As outlined above, there are at least 1,123 UK EdTech companies identified during this research. This database has been built from the bottom up, compiling multiple different sources (the methodology for building the total database of companies is described at length in Appendix 1.1.4.1). Each of the 1,123 companies were reviewed using AI and expert human review, so this represents an accurate lower-bound. The total number of companies is likely higher, with new companies being regularly launched, and some early-stage companies likely having no online presence. With at least 1,123 companies and hundreds of millions of pounds of annual investment, the EdTech market is strong, and making a clear contribution to the UK economy and technology sector.

As some EdTech companies span two or more verticals, some are double-counted, however, the total number of distinct, unique companies is 1,123, with some of these companies operating in multiple verticals. Figure 1 below shows the distribution and overlap of EdTech companies across industry verticals. While the majority of firms operate within a single vertical, a subset of the market provides solutions across multiple product categories. The most frequent overlap occurs between Foundational and Immersive learning tools. There is also frequent overlap between Assistive learning and EdTech hardware, as well as between Foundational learning and Management platforms.

Figure 1: Overlap of UK EdTech companies across industry verticals, showing firms operating in multiple product categories



Source: PUBLIC analysis of The Data City, February 2026

Figure 1 above illustrates the interconnected nature of the UK EdTech landscape. A closer analysis of these relationships highlights several key trends:

1. The most significant diversification occurs within Foundational learning. This vertical acts as a primary vertical, showing strong overlaps with Immersive and experiential learning (**46 companies**) and Management and administrative efficiency (**46 companies**). This suggests that many core educational platforms are evolving into all-in-one solutions that combine basic instruction with advanced engagement tools and administrative support.

2. A major link exists between Assistive and inclusive learning and EdTech hardware (**46 companies**). This reflects a market where accessibility solutions often require specialised physical equipment (such as sensory devices for example) integrated with bespoke software.

3. Assessment technologies show a notable flow into Foundational learning (**29 companies**). This indicates that assessment is increasingly viewed as an integrated feature of learning platforms rather than a standalone service, providing a feedback loop directly within the learning environment.

4. Smaller but distinct connections are visible between EdTech hardware and Immersive learning, pointing toward the growth of AR/VR and specialised classroom equipment.

Note: Figure 1 focuses on firms listed with at least two distinct product categories. Companies operating in a single category (the majority of the dataset) are not shown in this connection map as they do not represent a flow between verticals.

To enhance understanding of the market, this report presents an updated estimate of the Gross Value Added (GVA) of the EdTech sector.[10] Across the 1,123 companies identified, there are approximately 29,660–39,100 employees. This range is based on publicly available data for the lower bound (29,660 employees), but that there are many companies in the EdTech database with no publicly available employee data. As such, statistical modelling can be used to estimate a realistic figure for the whole sector (39,100). This corresponds to an estimated GVA of £1.8–£2.4 billion. Further details on the methodology are provided in Appendix 1.4.2.

Additionally, Table 15 compares key estimates from the 2022 report with the updated findings for 2025. It is important to note that different methodological approaches and taxonomy definitions were used in the 2022 report and the current analysis. As a result, direct comparisons or assessments of growth are not reliable and should be interpreted with caution.

3.1.3 Composition and trends

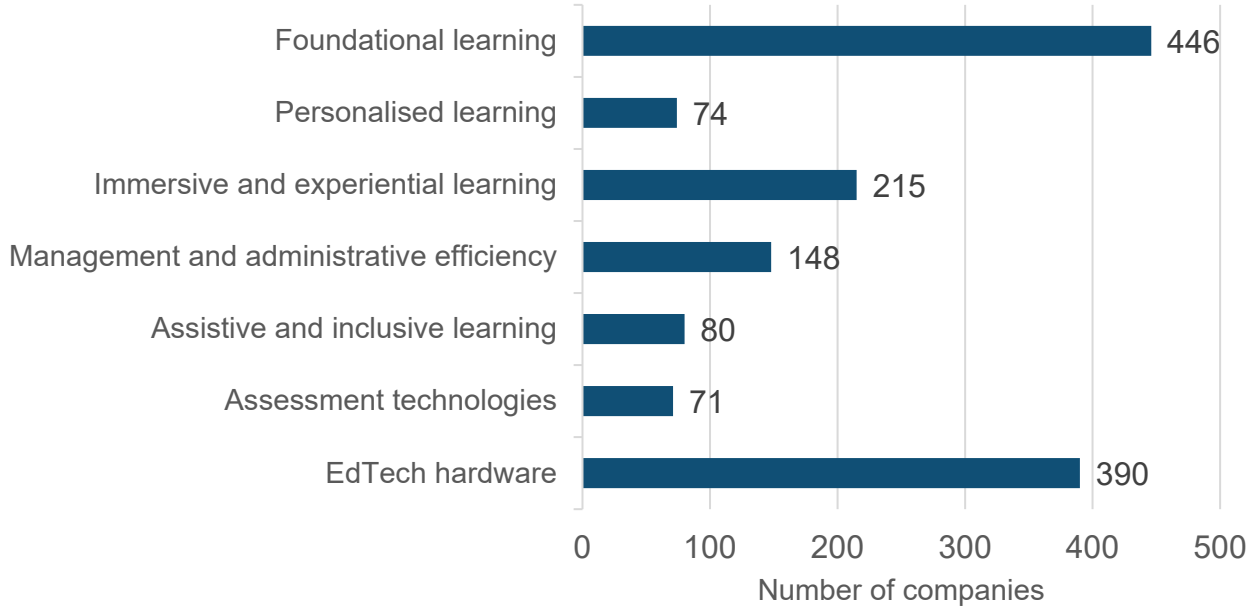
While the aggregate data indicates overall sector stability, a cross-sectional analysis of revenue, growth, and capital allocation reveals three critical market dynamics. These trends represent a fundamental shift in the sector's value proposition as it matures.

[10] GVA (Gross Value Added):is the standard measure used by the Office for National Statistics (ONS) to quantify the economic value generated by an individual sector, industry, or region. It is calculated by taking the value of the goods and services produced (Turnover) and subtracting the cost of all inputs and raw materials (Intermediate consumption) required to produce them.

3.1.3.1 Core content platforms and hardware are dominant verticals

The revenue data confirms that the UK education market remains anchored in mature, utility-focused technologies. Foundational learning (446 companies) and EdTech hardware (390 companies) are the most common company verticals. Figure 2 below shows the number of EdTech companies operating in each market vertical.

Figure 2: Distribution of EdTech companies across market verticals



Source: The Data City, February 2026

While Foundational Learning remains an established vertical with significant turnover, its steady but slow growth suggests a saturation point. More critically, these companies are now facing a structural threat from general-use LLMs. The emergence of general-purpose AI is turning standard content management into a commodity, reducing the competitive advantage of legacy platforms. While these established companies previously dominated in terms of investment, current investment data suggests a pivot, with funding now moving away from these traditional 'foundational' systems and toward specialised AI applications.

A trend within the EdTech hardware vertical is the growth of the certified refurbished and remanufactured device market. As the fleet of devices distributed between 2020 and 2022 in response to the COVID-19 pandemic approaches technical obsolescence, driven in part by the end of support for legacy operating systems, educational institutions are increasingly utilising refurbished hardware to manage costs and maximise efficiency.

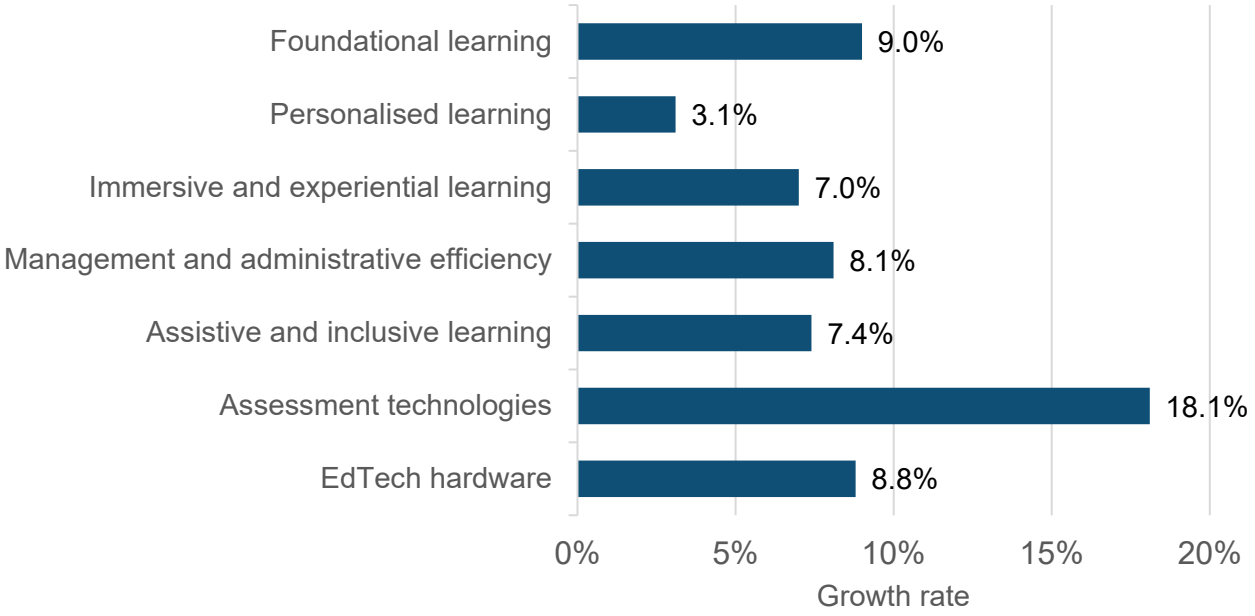
This shift addresses the primary barrier to digital transformation, namely, budget constraints. By choosing high-spec, professionally reconditioned laptops and tablets, schools can achieve cost savings of up to 80%. Beyond the financial relief, this trend is driven by two additional factors:

1. **Sustainability mandates:** schools and MATs are increasingly required to meet sustainability standards, such as those detailed in the DfE's 2022 Sustainability and Climate Change Strategy. This requires institutions to reduce environmental impact by extending the lifecycle of existing hardware and reducing electronic waste.
2. **Reduced digital divide:** the lower price point allows institutions to broaden device access to larger cohorts of students.

3.1.3.2 Assessment technologies are growing in use

Assessment Technologies is the fastest-growing vertical by year-on-year growth rate, despite accounting for a smaller share of total market revenue. This trend aligns with the findings of the DfE's Working Lives of Teachers and Leaders survey (2023), which identified reducing workload as a key institutional priority. Figure 3 below shows the annual growth rate of UK EdTech companies across different market verticals.

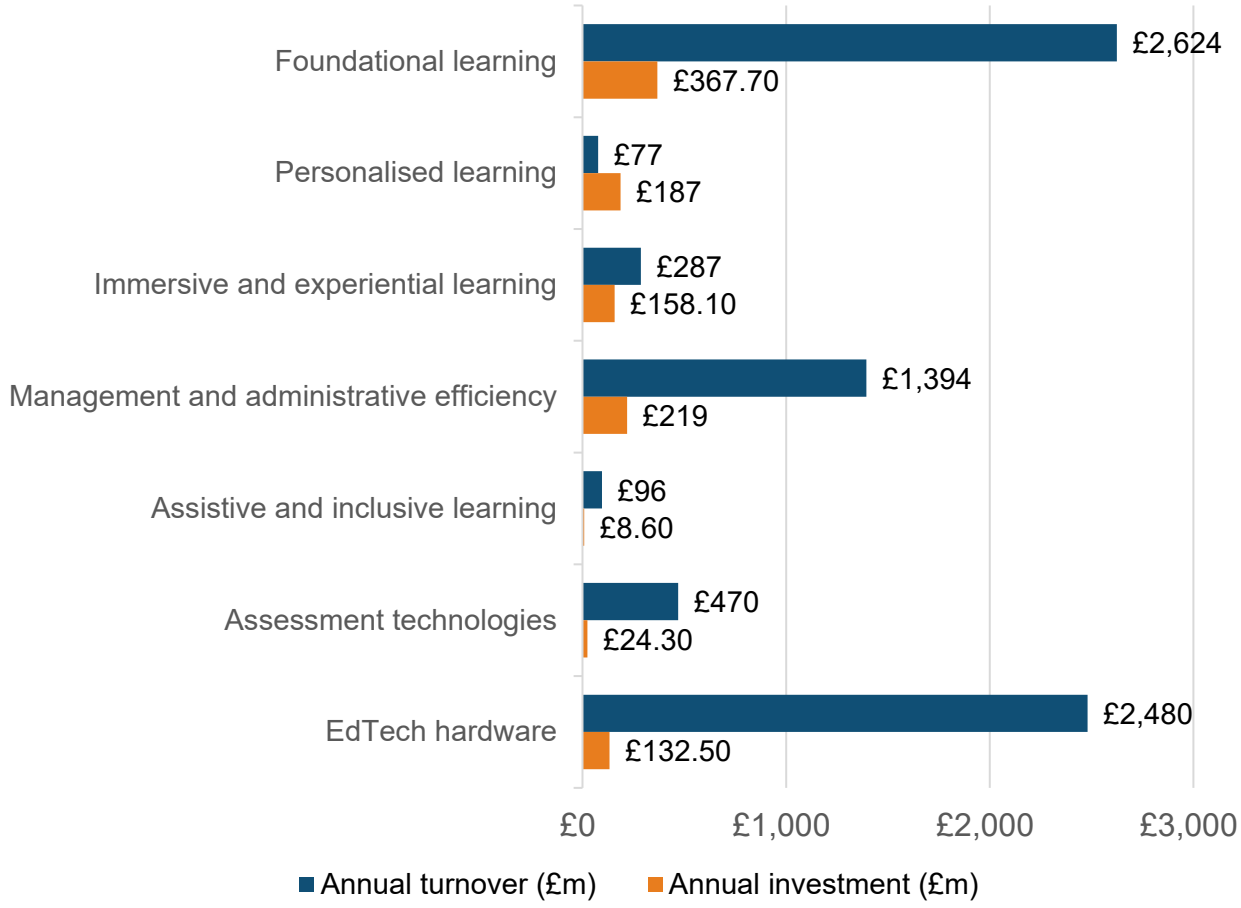
Figure 3: Annual growth rate of UK EdTech companies by market vertical



Source: The Data City, February 2026

Despite being the fastest-growing vertical by revenue, Assessment technologies attracted a disproportionately low share of investment. This suggests the vertical is currently sustained by a 'revenue-led' model - driven by immediate school procurement needs - while private capital remains focused on higher speculation, AI-centric platforms that offer longer-term scalability for investors. Figure 4 below shows the relationship between annual investment and turnover across different EdTech market verticals.

Figure 4: Comparison of annual investment and turnover across the EdTech market verticals



Source: The Data City, February 2026

3.1.3.3 The gap between investment and revenue

Market data from The Data City identifies a difference between current revenue generation and the allocation of investment. This trend is most visible in the Personalised learning category, which received £187 million in investment. This is the third-highest investment total in the sector, even though the category contributes less than 1% to total turnover. This suggests that investors are focusing on a future shift toward AI customisation that has not yet appeared in school spending.

There is a different trend within Assistive and inclusive learning. While this category shows consistent revenue and serves a high-priority demographic, it received the lowest investment in the dataset at £8.6 million. The data indicate that private investment is not currently following the established revenue patterns in this area. As a result, the development of new inclusive technology is limited by lower levels of funding despite the presence of a consistent customer base.

Case study: Bridging the SEND funding gap with technology

In a research interview, the headteacher of a large state-funded primary school in London described the challenge of maintaining standards amid rising costs while protecting provision for pupils with special educational needs and disabilities (SEND).

To safeguard specialist SEND support, including provision such as that specified in Education, Health and Care Plans (EHCPs), the school retained one-to-one and targeted SEND staff. To offset cost pressures, the school removed general classroom-based teaching assistants from Key Stage 2 for a three-year period.

This resulted in a ratio of one adult to 30 pupils in mainstream classrooms. The headteacher described this model as unsustainable for closing attainment gaps through traditional approaches alone:

> "You cannot do the job one adult to 30 children and still get better outcomes... The only way we can do that is by using technology."

The school adopted adaptive technology, which analyses pupil performance in real time and adjusts content accordingly. Used to support whole-class teaching, it enabled more effective differentiation and helped teachers manage mixed-ability classrooms with reduced adult support, while maintaining designated SEND provision.

The school reported strong outcomes for disadvantaged pupils. In 2024, 76% achieved the national standard in combined Reading, Writing, and Maths, compared to a national average of 46% for disadvantaged pupils.

While pre-intervention data is not available, this suggests strong performance relative to national benchmarks. As a single case study, outcomes may also reflect the school's specific context and pupil demographics.

The headteacher identified adaptive technology as an important contributing factor, enabling the school to support classroom instruction while preserving intensive SEND provision within a constrained budget.

3.1.4.2 EdTech investment landscape

Venture investment across the UK technology sector has been affected by broader macroeconomic conditions, specifically the rise in interest rates and inflationary pressures, which led to a 48% decline in total UK tech investment in 2023, according to the HSBC Innovation Banking and Dealroom UK Innovation Economy Report (2024). Within this financial climate, EdTech faces a specific challenge regarding investor perception. Qualitative evidence from interviews suggests that generalist investors do not currently view the sector as a primary high-growth category.

Despite the strength of the UK's wider venture capital base, the group of specialised investors focusing exclusively on the education sector remains small. Key firms in this specialised group include Emerge, Brighteye Ventures, and Nesta Impact Investments. The integration of AI is changing this perspective by offering a clearer value proposition regarding return on investment. This shift is increasing the competitiveness of the sector within the wider technology market. Notable late-stage investment raises include Sparx Learning and CENTURY Tech who both secured significant investment from venture capital firms to drive further company growth.

3.1.5 Role of the third sector and NGOs

While the commercial market drives much of the sector's growth, Non-Governmental Organisations (NGOs), charitable trusts, and non-profit foundations are essential to the UK's EdTech ecosystem. These organisations typically step in where commercial incentives are low, including focusing on closing the digital divide, providing basic infrastructure, and supporting high-risk innovation.

Unlike commercial providers who focus on revenue, these entities prioritise social impact or non-commercial research and development. They can often act as a 'safety net', developing solutions for underserved communities that private investors might overlook.

Key actors and contributions

These organisations were selected to illustrate the various ways the third sector supports the ecosystem, including publicly funded bodies, local authority-owned trusts, and independent foundations focused on research and hardware access that address gaps in the commercial market.

- **Oak National Academy:** originally launched in 2020 as a sector-led response to the pandemic, Oak has transitioned into a Non-Departmental Public Body (NDPB).It provides free, optional, full curriculum sequences and supporting resources across all national curriculum subjects from Key Stages 1-4, on a single digital platform. Oak had had an evident impact on reducing teachers' workload. DfE market assessments, as well as this research, suggest that it also influences commercial investment decisions by offering a free alternative to core curriculum content, although its impact to date has only been found to be "modest".

- **London Grid for Learning (LGfL):** founded in 2001 as a charitable trust owned by London's local authorities, LGfL illustrates the long-term stability of the non-profit model. It provides broadband, cybersecurity, and safeguarding services to thousands of schools nationwide. Its non-profit status allows it to aggregate procurement demand to lower costs for schools, reinvesting surpluses into the development of new educational resources and safety frameworks rather than dividends.

- **The Raspberry Pi Foundation:** established in 2009, this charity has been instrumental in democratising access to computing education. Beyond its hardware, the Foundation is a significant provider of free pedagogical research and teacher training (e.g., through the National Centre for Computing Education). Recently, it has focused on the 'AI literacy' gap, launching research frameworks to help teachers explain data-driven systems to primary pupils, an area often overlooked by commercial software vendors.

- **Micro:bit Educational Foundation:** spun out of the BBC's 'Make it Digital' campaign in 2016, this non-profit aims to inspire children to participate in the digital world. By 2025, it had distributed millions of devices globally. Its model combines low-cost hardware with high-quality, free educational resources, specifically targeting the 'gender gap' in STEM and supporting students from disadvantaged backgrounds who might otherwise lack access to physical computing tools.

- **The Digital Poverty Alliance (DPA):** established in 2021 by the Learning Foundation and industry partners, the DPA coordinates efforts to eradicate digital poverty by 2030. It acts as a convenor for the Assistive and Inclusive Learning vertical, addressing the hardware and connectivity gaps that prevent effective EdTech adoption. The DPA provides an evidence base for policy interventions, arguing that EdTech innovation cannot succeed without first resolving basic access inequities.

These organisations act as a necessary counterbalance to the market gaps described earlier in this report. While private investment often follows high-growth trends, these non-profits focus on areas with high social value but lower profit potential, such as digital inclusion.

By funding essential research and developing tools for underserved communities, they ensure that the benefits of EdTech are not restricted to the most affluent schools. In this way, the third sector provides the evidence and infrastructure needed to help the entire UK education system become more equitable.

3.2 Demand side: Use of EdTech in schools

Reliable data on the actual use of EdTech in schools is limited. Existing evidence often relies on self-reported surveys or procurement data, which indicate what schools purchase but provide little insight into how technologies are used in practice.

To address this gap, this research analysed real-world usage data from EdTech Impact, capturing school-level engagement with digital tools at a granular level. The sample is taken from a group of schools within a single large MAT. By cross-referencing this data with the established taxonomy, the analysis provides a rare, data-driven view of how staff and pupils interact with different categories of EdTech

in everyday use. For more details regarding the methodology and the MAT dataset, please refer to Appendix 1.4.3.

Note on terminology: in this analysis, an active contract refers to a formal, paid agreement between a school and a provider, indicating that the school has authorised the tool for use. Usage (or tracked instances of use) refers to the actual engagement recorded by the system, such as logins or active time spent on the platform. A school may hold an active contract for a tool that sees low actual usage, while high usage indicates a tool is deeply embedded in daily routines. Please see Appendix 1.4.3 for more details on the methodology behind this analysis.

The following section examines how EdTech tools are used in practice across the EdTech Impact school sample. It then highlights the most commonly used verticals in the MAT sample - Management and administrative tools, and Classroom and assessment tools. The section then explores the top widely used products within these two verticals.

The analysis also examines patterns of engagement to understand the intensity and nature of usage across different types of tools. Tables then present the most widely used digital tools across the sampled schools, grouped by primary phase, secondary phase, and tools used across unknown or mixed phases.

Finally, the section incorporates qualitative findings from interviews to provide additional context on product adoption and broader market dynamics, including the role of global technology platforms and state-backed provision.

3.2.1 Management and administrative tools

The analysis of usage across a sample of schools within a large MAT shows that tools in the Management and administrative efficiency vertical are the most consistently active. These systems provide the operational framework for daily activities, including student registration and behaviour tracking.

To reach these conclusions, the analysis measures the average time spent on each product along with the total frequency of user access. This dataset includes all products identified within the school environment, regardless of whether the institution holds a formal subscription for the tool. This comprehensive approach provides a more accurate view of total digital activity across the sampled schools.

- **Management Information Systems (MIS):** Arbor MIS is the most used MIS platform within the study sample, with an active contract in approximately 35% of the schools analysed. In this context, percentages refer only to the defined sample of schools in the MAT included in this study, not the wider population of all schools. The platform typically serves as the central repository for student data.

- **Operational utilities:** SalamanderSoft is the most frequently observed user management solution in the sample, with active contracts in approximately 40% of schools in the sample.

- **Recruitment:** MyNewTerm is the most commonly observed recruitment platform in the sample, with around 35% of schools in the sample holding active contracts.

Methodological Note: Across each category, **only the most frequently observed supplier is named for clarity and readability.** Multiple other suppliers are present within the sample but are not individually listed here. The named tools should therefore be interpreted as the most commonly observed within this specific sample of a single MAT, rather than as an exhaustive or market-wide representation.

3.2.2 Classroom and assessment tools

The second-largest area of engagement is found within assessment technologies and foundational learning platforms. Percentages and usage figures throughout this section refer only to the defined study sample, not to the wider population of schools.

- **Departmental integration:** Exampro is the most frequently observed assessment tool in the sample, with 14% of schools holding active contracts (119 tracked instances of use). The presence of multiple contracts within individual schools suggests that different departments may procure and use the platform independently to support subject-specific assessment and progress tracking. Among schools where the platform is used, this corresponds to an average of 2.75 contracts per school, indicating adoption at the departmental level rather than as a single whole-school system.

- **Curriculum platforms:** Kerboodle is the most frequently observed curriculum platform in the sample, with 23 active contracts recorded. Usage data indicates that platforms in this category are used by schools to support curriculum planning and lesson delivery, often providing structured teaching materials aligned to subject content.

- **Inclusive technologies:** Widgit is the most frequently observed specialised tool supporting pupils with specific communication and learning needs, with active contracts in 11% of the sampled schools. CPOMS is the most frequently observed safeguarding platform, used in 19% of the schools in the sample, supporting the recording and management of safeguarding and pastoral information.

An analysis of daily engagement reveals how different tools are used throughout the school day:

- **Gamified engagement:** tools such as Blooket or Quizlet show ‘flash usage’, characterised by intense sessions, typically at the start or end of a lesson for

retrieval practice.

- **Deep work:** platforms like White Rose Education, Sparx Maths, and CENTURY frequently record sustained sessions.

- **Literacy and numeracy practice:** Times Table Rockstars, Lexia, and Spelling Shed demonstrate a consistent daily usage pattern, with short daily sessions.

3.2.3 Patterns in usage by taxonomy vertical

As described in Section 3.2, usage refers to tracked instances of engagement recorded by the EdTech Impact platform across the school sample, such as logins or active time spent. The intensity and nature of usage vary significantly depending on the functional category of the tool:

- **Management and administrative efficiency:** this vertical exhibits the most widespread adoption across the greatest number of schools. It is used consistently and focuses on operational consistency, functioning as the school's daily tool for student registration and behaviour tracking.

- **Foundational learning:** while this category has the largest number of unique tools identified in this sample, it also generates the highest total number of active student usage. Tools such as White Rose Education and Twinkl are used heavily every day for lesson delivery.

- **Assessment technologies:** unlike the steady usage of administrative tools, this vertical is characterised by high-frequency usage spikes. Usage is cyclical, with platforms such as Exampro experiencing significant peaks during assessment windows for paper creation and data entry.

The maturation of the Assessment technologies vertical is further evidenced by Jisc recently announcing plans to establish a major procurement framework for digital assessment tools.[11] The proposed framework structure is in six distinct ‘Lots’, providing a roadmap for how these technologies are evolving:

- Lot 1: Assessment platforms for exam design, delivery, and grading.
- Lot 2: Academic integrity and plagiarism detection.
- Lot 3: Secure lockdown browsers for digital testing.
- Lot 4: Remote proctoring and invigilation services.
- Lot 5: ePortfolios for longitudinal progress tracking.

[11] The Jisc procurement framework for digital assessment tools is intended to support UK education providers in procuring compliant and interoperable assessment platforms. The six Lots reflect different functional categories of digital assessment solutions, providing an indicative structure of the evolving market rather than endorsement of specific suppliers. (Based on publicly available contract notice information at the time of analysis.)

- Lot 6: Specialist and niche assessment tools.

While this framework is mainly intended for further education and higher education providers, the formal separation of these functions into distinct procurement categories reflects increasing specialisation within the market. Rather than assessment being treated as a single, monolithic product category, it is now recognised as a modular ecosystem comprising interoperable components. This signals a shift from standalone digital tools toward integrated, lifecycle-based assessment infrastructure, where platforms increasingly combine secure delivery, integrity monitoring, analytics, and feedback capabilities. The growing role of AI further accelerates this integration, enabling automation across exam creation, marking, and personalised feedback while operating within a more structured and regulated procurement environment.

- **Personalised learning:** Usage within this category is concentrated across a small number of platforms, including Seneca Learning, Sparx Maths and Tassomai. Observed usage patterns indicate that these platforms are accessed across multiple schools in the sample, with activity frequently occurring in the late afternoon and early evening. These observations relate to patterns of usage only and do not indicate impact on learning outcomes or effectiveness.

- **Assistive and inclusive learning:** the adoption rate is high relative to the number of available tools. Widgit serves as a key example in this category, with active contracts across 12 schools in the sample. Widgit is used consistently throughout the day to create visual communication supports and symbol-supported lesson materials.

Case study: Use of technology in a complex-needs setting

Interviews with practitioners reveal that for EdTech to be effective, it must be durable and work in complex, real-life settings. In a school that includes 240 pupils with complex needs, technology is not an optional extra but a fundamental requirement for inclusion. An assistant headteacher at this school explains that for their pupils, technology is often the only bridge to the outside world:

> "For our pupils, especially those with profound and multiple learning difficulties, technology is their voice. It is the difference between a child being able to tell us they are in pain or being stuck in silence."

To support these requirements, the school utilises a combination of digital symbol creation tools and individual communication applications. Staff use these systems daily to develop visual timetables that help pupils navigate their environment. For personal interaction, the school invests in software designed to facilitate speech and language development.

> "We need technology that is robust. In our environment, equipment often

> breaks because of the pupils' physical needs or challenging behaviours. We've seen expensive devices that don't last a week. We need national bodies to look at how to make this tech more durable for special needs settings."

The tables below provide an overview of EdTech tool adoption and engagement across a sample of schools within a large MAT, drawing on platform usage data supplied by EdTech Impact. Table 5 presents the distribution of active tool contracts by EdTech vertical, offering insight into patterns of institutional adoption. Table 6 examines engagement intensity by ranking the most frequently used tools within the primary phase, secondary phase, and cases where the phase could not be identified. Usage is reported using an annualised average usage-per-pupil metric, calculated by dividing total recorded time spent on each tool by the number of pupil users. This normalised measure enables meaningful comparison across tools with differing adoption levels.

The tools listed below are the most frequently used across the sample MAT and are not necessarily representative of the wider sector. The data provides an indication of usage patterns but does not assess the impact of these tools. It is also important to note that the dataset reflects in-school usage recorded during the study period and excludes activity on personal devices or outside school settings.

Table 5: Overview of EdTech tools used across the MAT, showing frequency of recorded use and number of active school contracts by EdTech vertical

EdTech tool	EdTech vertical	Active contracts
Salamandersoft	Management & administrative efficiency	46
Exampro	Assessment Technologies	44
Arbor MIS	Management & administrative efficiency	39
MyNewTerm	Management & administrative efficiency	39
IMP Software	Management & administrative efficiency	39
Iplicit Finance System	Management & administrative efficiency	39
SAMpeople	Management & administrative efficiency	39
dataJAR	Management & administrative efficiency	26

EdTech tool	EdTech vertical	Active contracts
ParentPay	Management & administrative efficiency	24
InVentry	Management & administrative efficiency	24
Kerboodle	Foundational learning & content platforms	23
CPOMS	Assistive and inclusive technologies	22
Twinkl	Foundational learning & content platforms	20
White Rose Education	Foundational learning & content platforms	19
Accelerated Reader	Foundational learning & content platforms	16
Pupil Progress	Assessment and examination	15
Widgit	Assistive and inclusive technologies	13

Source: PUBLIC analysis of EdTech Impact data, February 2026

Table 6: Most used tools per phase ranked by average usage per pupil

Rank	Primary schools	Secondary schools	Unknown phase
1	Green And Tempest	Gimkit	ChatGPT
2	Zoom	Reading Eggs	Pear Deck
3	Enrich Education	OnShape	StudyStack
4	Renaissance myON	Google Meet	Claude
5	CENTURY	YouTube	Kami
6	Lexia Core5 Reading	Chemix	-
7	Spelling Shed	Google Docs	-
8	Chesskid	Sphero Edu	-
9	Code.org	Noteflight	-
10	Scratch	Zoom	-
11	Kahoot	Lexia PowerUp Literacy	-

Source: PUBLIC analysis of EdTech Impact data, February 2026

Safeguarding note: DfE advises that any use of GenAI by pupils should be carefully managed with appropriate safeguards in place. In its guidance Generative artificial intelligence (AI) in education and related resources, the DfE states that schools and colleges should: comply with age restrictions set by AI tools and open-access large language models; consider online safety, including AI, within their safeguarding policies and procedures; consult Keeping children safe in education; refer to generative AI product safety expectations; and ensure appropriate systems are in place in line with Filtering and monitoring standards for schools and colleges.

These requirements emphasise the need for supervision, safeguarding, data protection compliance, and effective filtering and monitoring where pupils interact with AI tools.

3.2.4 Qualitative findings: Product-specific adoption and market drivers

In addition to the EdTech Impact data analysis, the qualitative research revealed a high concentration of use around a small cohort of products. While this report primarily focuses on the domestic English EdTech market to avoid skewing data with global outliers, this section acknowledges the presence of global 'Big Tech' and other major US companies in schools. Their inclusion provides a realistic snapshot of the competitive landscape and offers context regarding the tools currently used by pupils and teachers.

Schools mentioned a diverse list of EdTech tools, including:

- **GenAI ecosystem:** Interviews indicate rapid and largely organic adoption of general-purpose GenAI tools in schools. These tools are primarily used for teacher-facing administrative tasks, such as generating lesson plans, creating worksheets and teaching resources, and drafting emails. However, the sample data also shows some pupils use[12]. Based on interview insights and usage patterns observed in the sample, the most commonly used tools include ChatGPT and Claude. Among AI-search and integrated assistants, Perplexity, Gemini and Microsoft Copilot are commonly used.[13]

- **Canva and Kahoot!:** these platforms have become widely used tools in classrooms for creative projects and formative assessments. Interviews found that staff use Canva to create professional-looking resources, while students use it to develop their visual literacy skills. Kahoot! was cited frequently as a game-based learning tool used by schools, often as a 'lesson starter'.

[12] The DfE has published guidance emphasising that any use of GenAI by pupils and schools should be carefully managed with appropriate safeguards in place. Relevant resources include: Generative artificial intelligence (AI) in education (policy guidance for schools and colleges); Generative AI: product and safety standards; Using AI in education settings: guidance for schools and colleges; Keeping children safe in education; Data protection in schools and Filtering and monitoring standards for schools and colleges. These documents collectively highlight the need for supervision, safeguarding, data protection compliance, and appropriate filtering and monitoring when pupils interact with AI tools.

[13] This ranking should be interpreted cautiously, as it is based on qualitative interview insights and a limited sample rather than comprehensive market-wide usage data.

- **Oak AI Learning Assistant (Aila):** launched by Oak National Academy in September 2024, this free tool is designed to reduce teacher workload by assisting with lesson planning. Early qualitative research by Oak National Academy indicates that some users report time savings of approximately three hours per week.

- **Earwig:** a platform widely used, particularly in specialist settings, for evidence collection, assessment, and record-keeping. Its ability to automate report writing is frequently cited as a key driver for staff adoption.

The prominence of these tools highlights two important dynamics in the English EdTech market: international 'Big Tech' tools and 'state-backed' technology platforms.

The Big Tech presence

The widespread use of global platforms like Microsoft Copilot and OpenAI in schools creates several policy considerations:

- **Compliance and standards:** general-purpose tools were not always built with UK-specific educational standards or safeguarding architectures as their primary focus.

- **Vendor lock-in:** as digital platforms become embedded in school workflows, switching costs can become significant. Schools may face technical challenges when migrating data between systems, as well as contractual barriers such as multi-year agreements. However, these issues are not limited to large providers and can arise across the EdTech market, making it difficult for schools to change suppliers or trial alternative solutions.

- **Market visibility:** domestic SMEs often lack the marketing scale to compete with global tech giants, despite offering more curriculum-aligned solutions.

The role of government-led EdTech tools and initiatives

The Oak AI Learning Assistant (AILA) represents a significant state-backed entry into the market. While the AILA tool is potentially effective for workload reduction, it creates new competitive dynamics:

- **Commercial displacement:** while the tools outlined in Section 3.2.4 are generally popular, some domestic suppliers argue that free, state-funded resources make it difficult for commercial SMEs to remain viable in the same product categories.

- **The digital divide:** conversely, supporters argue that free provision is essential to ensure that advanced AI tools are not restricted to the most affluent schools, thereby maintaining a 'digital baseline' across the sector.

Case study: The structural barriers for specialist SMEs

Interviews with established companies illustrate how market structure, rather than product quality, often determines survival. For SMEs, the challenge is getting seen. One founder describes an "unfair battle" where tools created by educators are drowned out by the superior marketing budgets of generalist tech giants:

> "People don't hear about our product any more... we are fighting against big players [who have] overloaded the markets."

Another leader of a learning platform echoes this sentiment, noting that schools are overwhelmed by aggressive marketing and free trials. This saturation forces decision-makers to shut down, making it nearly impossible for new entrants to break through the noise without significant sales resources.

A director at a specialist immersive learning company notes that for niche, industry-standard tools, offering free access is a "complete necessity" to ensure equity. Without a free tier, they argue, access to advanced digital tools would be restricted to well-resourced schools, exacerbating the digital divide.

While investors are betting on AI-driven tools, innovation in specialist technology is often held back by administrative hurdles that exclude smaller companies. One participant recounts the impossibility of competing for government innovation grants, noting that large companies have teams of people who can afford to fill those applications, whereas SMEs cannot spare the administrative resources to apply.

One founder describes the struggle of navigating a system where sales cycles have slowed dramatically due to multi-layered decision-making:

> "In 2021, it was a click... now it takes ages. You have to go through so many layers of decision-makers."

3.3 The EdTech implementation journey

Schools, suppliers and sector experts were interviewed to understand how EdTech solutions are selected, purchased, and implemented. This helps to explain current market trends and behaviours and examines how EdTech decisions are typically made in schools.

To support this analysis, an eight-stage process map was developed, outlining the key steps typically involved in EdTech implementation.

The schools examined in this research each followed their own processes and sequences of steps. The eight-stage model is not intended as a one-size-fits-all approach: rather, it

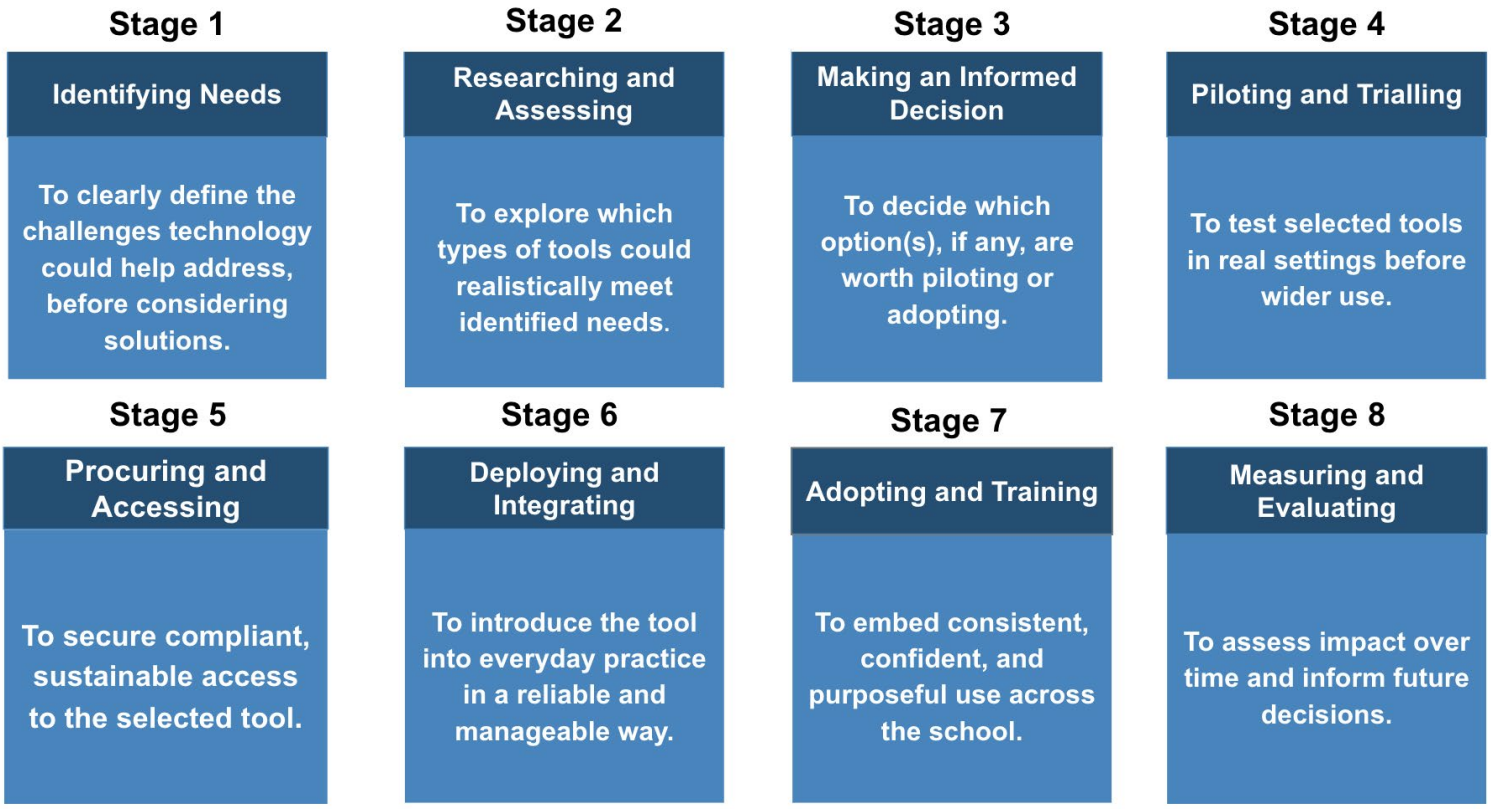
aims to support reflection, planning, and informed decision-making across different contexts.

For each stage, this section describes the activities undertaken by some schools and highlights the barriers or challenges encountered by others (see Appendix 6 for a summary table). While these barriers are linked to specific stages for clarity, many are systemic and affect multiple stages. As highlighted in interviews and the literature, budget, resource, and time constraints, as well as workforce capacity, often create challenges throughout the process.

The eight stages of the EdTech implementation identified in this report are listed below. Figure 5 below summarises the eight stages of the EdTech implementation journey and highlights the purpose of each stage.

1. Identifying needs
2. Researching and assessing
3. Making an informed decision
4. Piloting and trialling
5. Procuring and accessing
6. Deploying and integrating
7. Adopting and training
8. Measuring and evaluating

Figure 5: The eight stages of the EdTech implementation journey and the purpose of each stage



3.3.1. Stage 1: Identifying needs

Some schools start by identifying the pedagogical, technical, and organisational challenges that technology could help to address. The aim is to ensure any future EdTech adoption responds to real school priorities. Needs may be identified at the **whole-school**, **department**, **individual or subject level**, and in some cases at a **MAT level**, particularly where schools are joining a trust or aligning systems across multiple settings.

This process is usually led by school leadership and governors, teaching staff and curriculum leaders, and SEND and inclusion specialists, with input from families and carers where appropriate.

Key activities mentioned by schools in relation to needs assessment include building a clear picture of current challenges using qualitative and quantitative evidence, such as attainment, progress and attendance data, workload and time-use information, surveys and interviews with staff, pupils and families, lesson observations or reviews of practice.

Schools also reported reviewing current practice and digital provision by mapping existing tools and platforms, identifying duplication and underused systems, and assessing where provision does not meet identified needs. A further activity involves clarifying intended outcomes by defining what improvement would look like in practice, focusing on outcomes rather than predefined solutions, including improvements in teaching quality and

consistency, inclusion and accessibility (including SEND), assessment and feedback, and administrative efficiency or workload reduction.

3.3.1.1 Common barriers at this stage

Some of the main barriers identified by schools during Stage 1 include:

- **Limited strategic planning:** many schools lack structured planning frameworks or clear accountability for digital development, leading to needs being identified for isolated issues rather than whole-school priorities.

- **Digital and AI literacy gaps:** as the market shifts towards advanced AI and adaptive tools, school leaders often face a knowledge deficit. Findings from the DfE's Technology in Schools Survey (2024–2025) published in November 2025 indicate that while general engagement is high, specific technical capability remains a challenge: only 29% of teachers have received training on how to use GenAI, and overall uptake of EdTech training has fallen to 64% (down from 70% in 2023). However, it is important to acknowledge that from September 2025, assistive technology content will be included in mandatory initial teacher training. This is likely to strengthen baseline capability over time, particularly in relation to supporting pupils with SEND. However, as this change will take time to filter through the workforce, current gaps in digital and AI literacy are likely to persist in the short to medium term.

  This limited understanding may restrict a school's ability to identify realistic or impactful technology opportunities. Leaders and staff may underestimate potential benefits, overlook risks, or misinterpret vendors' claims.

- **Equity and the digital divide:** a major barrier to cloud-based EdTech adoption is unequal access to digital resources at home. An estimated 3.7 million households with children (approximately 45%) do not meet the Minimum Digital Living Standard (MDLS), a benchmark developed by the Good Things Foundation and Loughborough University.

  The MDLS reflects a combination of factors, including access to devices, connectivity, and the skills needed to use digital services safely and effectively. Importantly, this figure should not be interpreted as a lack of basic access: internet connectivity is high across households with children, and a much smaller proportion (around 7.2%) lack essential equipment. Instead, the most significant gap relates to digital skills and confidence among adults in the household. These disparities, particularly in digital skills and confidence, can limit the effective use of EdTech beyond the classroom, especially where home learning depends on sustained engagement, parental support, or independent access to digital platforms.

3.3.2 Stage 2: Researching and assessing

Interviews indicate that schools use a range of approaches to research and assess EdTech, shaped primarily by **cost considerations, governance arrangements, and whether a tool is intended for classroom use or whole-school deployment**. Rather than following a single fixed process, schools typically combine formal mechanisms, such as trust-level approval panels or procurement processes, with informal approaches, including teacher-led trials and peer recommendations.

Across these processes, schools tend to weigh a similar set of factors when selecting tools, including **cost and value for money, alignment with identified needs, evidence of impact**, **compatibility with existing systems, ease of use for staff and pupils, and long-term flexibility**. Decision-making is rarely purely top-down or bottom-up. Evidence from early adopters of AI shows that senior leaders often provide strategic direction and enable adoption, while individual teachers or digital 'champions' frequently initiate experimentation with new tools and influence wider uptake across the school. Adoption also varies by digital maturity, with highly mature schools typically demonstrating clearer strategies, stronger leadership support, and more reliable infrastructure[14].

Once needs have been identified in Stage 1, schools explore tools that could address these priorities, typically involving collaboration between teaching staff, technical leads, senior leadership, and SEND or inclusion specialists.

Key activities described by schools include reviewing internal guidance and approved tools, alongside national guidance on security, accessibility, and compatibility, such as DfE Generative AI guidance for schools and colleges. Schools also scan the market through supplier information, demonstrations (including events such as Bett), peer recommendations, and general web searches. Teachers also mentioned consulting supplier websites, education-focused platforms, and professional communities on social media (for example, Facebook groups such as AI for Teachers or LinkedIn communities such as the EdTech Hub page) to seek advice from other practitioners. In general, many interviewees reported feeling overwhelmed by marketing claims at this stage.

[14] According to the DfE, digital maturity in schools is measured through a metric based on three pillars, technology (infrastructure, devices and systems), capability (staff skills and confidence in using technology), and strategy (leadership planning and implementation of digital approaches). Schools are grouped into three maturity tiers (low, medium, high) based on aggregated scores across these pillars, representing increasing levels of systematic and strategic integration of educational technology

Case study: Centralised EdTech approval in a MAT

Following the rapid proliferation of GenAI and cloud-based applications, one interviewed Trust identified a trend where the 'hype' surrounding technology occasionally led to procurement decisions that bypassed established cognitive science and due diligence. The Trust moved to prevent a fragmented system of apps that adds friction to school operations.

As a strategy, the Trust established an internal digital marketplace to standardise evaluation. Tools are vetted for data privacy, cybersecurity, and pedagogical efficacy through a central 'funnel' and categorised.

This centralised oversight ensures that delegated procurement decisions are made with visibility of risk. By requiring suppliers to meet specific data standards, the Trust can conduct independent quantitative analysis, mapping platform usage data against mock exam results, to ensure technology investment is driven by pupil progress rather than only teacher time-saving.

3.3.2.1 Common barriers at this stage

- **Reliance on word-of-mouth:** Many schools reported difficulty filtering the large number of potential EdTech options. In the absence of structured evaluation processes, informal sources often play an important role in decision-making. The Technology in Schools Survey (2024–2025) asked teachers which sources they would most value for guidance when choosing what technology to use. The most commonly cited sources were advice from other teaching staff (38%) and insights from schools with strong experience of using technology (32%). This was corroborated by our interviews with teachers.

  While these peer networks provide practical insight, heavy reliance on word-of-mouth may reinforce subjective preferences and narrow the evidence base used to inform decision-making

- **Structural evidence deficits:** many EdTech solution types lack evidence about long-term impact. Research findings are often scattered, outdated, or produced by vendors, leaving educators without clear comparisons of effectiveness. Furthermore, evidence on EdTech's impact is inconsistent across learner groups and especially scarce for socio-economically disadvantaged students. Interviewees expressed that the EdTech Evidence Board Project represents a positive step towards addressing the current lack of evidence-based approaches for evaluating EdTech tools. One EdTech expert noted:

> “I do hold great hope for the EdTech Evidence Board. It can start to provide knowledge and understanding about the types of evidence that exist, which will hopefully help inform school procurement decisions.”

- **Rapid market evolution:** technology in education is changing faster than strong research evidence can be produced. The rise of AI and GenAI, which were not widely used in 2022, has made it harder to assess new tools. Schools must now consider not only whether tools work well, but also whether they are secure. This can be difficult because it is often unclear how these tools operate or manage data. As a result, new products often appear faster than they can be independently evaluated, leaving schools to rely on limited or developing evidence. Recent initiatives, including the expansion of the EdTech Testbed Programme, aim to help address this gap, although systems for evaluating tools are still developing.

- **Digital maturity:** A school's level of digital maturity significantly shapes how well it can navigate this stage. More digitally mature schools tend to have clearer technology strategies, stronger leadership support, and greater staff confidence, enabling more structured and evidence-informed assessment. Less digitally mature schools are more likely to make reactive decisions, constrained by limited budgets, lower staff confidence, and concerns about technical capacity and security. This means the quality and rigour of research and assessment at this stage vary considerably across the sector.

Case study: Navigating the context gap in peer recommendations

A school leader at a Local Authority Maintained Primary School describes their rigorous approach to validating EdTech products. Their strategy highlights the limitations of standard marketing evidence and the critical importance of context when sharing advice between schools.

They advocate for a ‘combined approach’ to decision-making, noting that they fear that supplier-led demonstrations can lack objectivity. They argue that relying solely on vendor-provided references is insufficient because vendors naturally select their most successful implementations.

To mitigate this bias, the school actively seeks out peer institutions for independent feedback ("having those conversations has been one of those things that we've tried to do as much as possible"). However, the school warns that even trusted peer recommendations must be scrutinised for contextual fit:

> "[It is about] knowing that context and looking at it and saying, 'Okay, that's absolutely fantastic that that works for you, but that won't work in our school because of this and this reason'."

Having developed this critical eye, the school has transitioned from a passive consumer

to an active influencer within its local network. By adopting technologies early - such as VR hardware - they now act as a validation point for others:

> "I feel like more than anything, we've probably flipped a little bit... We had things like VR headsets before other schools in the city did. And off that recommendation, some other schools have gone and got it and use those sorts of pieces of hardware."

3.3.3 Stage 3: Making an informed decision

After the initial scoping stage, schools then often move to making a decision between the shortlisted options. Interviewees noted that the purpose is to decide which option, if any, is sufficiently aligned with needs to justify piloting and further adoption. Decision-making is often led by school leadership and governance, with input from teaching staff and curriculum leaders, technical or IT support, and SEND and inclusion specialists.

Key activities mentioned by schools in relation to decision-making include comparing options against agreed criteria, such as alignment with priority needs, curriculum fit, usability, SEND and accessibility requirements, and safeguarding or data protection standards. Schools also review available evidence of likely impact, drawing on research, evaluations, and structured peer feedback, and where formal evidence is limited, assessing plausibility within their own context.

Cost and resourcing considerations form a further component, including budget constraints, staff time, training requirements, and ongoing support, with attention to whether anticipated benefits are proportionate to costs. Schools then assess system fit, examining integration, interoperability, workflow implications, duplication, and potential workload effects. The process concludes with documenting decisions and next steps, including what was selected or rejected, the rationale, any assumptions to test, and required approvals.

Case study: Teacher-led innovation and centralised review at a MAT

One MAT explained that the adoption of new tools is driven by classroom needs but governed by a centralised review process. When staff identify a potential app, they must submit a formal application detailing the specific year groups, the pedagogical 'why', and the intended impact on student outcomes.

The Trust then conducts a 'behind-the-scenes' review (GDPR compliance, data privacy, and safeguarding). To ensure value, tools are assessed on whether they are 'active' learning aids or merely 'passive' tools. For unfamiliar or complex software, the Trust initiates a pilot program involving the requesting teacher and peers from other schools. This phase often includes gathering student and parent feedback to gauge impact before a final decision is made for trust-wide rollout.

3.3.3.1 Common barriers at this stage

Competing priorities and resource pressures: schools must balance multiple pressures, including curriculum goals and budget limits. These constraints often force trade-offs, where the most affordable option might take precedence over the most pedagogically effective one. Some schools have also described the situation in which high-stakes accountability and curriculum pressures can force schools to expedite decisions, skipping necessary consultation to implement a quick fix.

3.3.4 Stage 4: Piloting and trialling

Some schools highlighted the importance of testing selected tools on a small scale, in real conditions, before wider rollout. They emphasised that this helps assess usability, fit with existing practice, and early signs of impact, and identify risks or unintended consequences before committing further time or budget. Piloting typically involves teaching staff, pupils, SEND and inclusion specialists, and EdTech suppliers. Schools emphasised that supplier involvement is often particularly important at this stage, supporting onboarding, troubleshooting, and structured feedback. Some schools participate in structured testbeds (e.g., the expanded DfE EdTech Testbed Programme) that enable longer trials, stronger evaluation and feedback loops to inform product development.

Key activities mentioned by schools in relation to piloting and trialling include setting clear goals and success criteria linked to identified needs and agreeing on an appropriate duration, often longer for more complex tools. Schools prepare and support participants by selecting pilot groups and providing practical guidance or lightweight training.

During the pilot phase, schools also identify technical issues, workload implications, accessibility concerns, and safeguarding considerations before determining next steps.

Case study: Piloting Augmented Reality (AR) in primary education

One AR supplier described a pilot they were involved in, to explore whether AR could improve engagement and knowledge retention without increasing teacher workload or requiring expensive specialist hardware such as headsets.

The pilot followed a staged, curriculum-first approach. Classroom observations were conducted initially to identify specific pedagogical gaps before introducing any technology. Compatible tablets were selected to align with the school's existing infrastructure, reducing integration barriers.

Implementation took the form of an exhibition-style installation in the school hall, using large cardboard markers based on Platonic shapes to trigger AR experiences. This format was designed to generate high engagement while supporting links between mathematical and scientific curriculum content.

Successful adoption depended heavily on senior leadership team buy-in, with a school's overall approach to technology proving more influential than individual teacher age or experience. In practice, IT Leads typically assessed technical feasibility first and then presented a cost–benefit case to leadership. To support sustainability, the pilot proposed a 'drip-feed' model, combining an initial roadshow to build teacher confidence with a rental model enabling schools to operate the exhibition independently over time.

Focus groups and quizzes confirmed high levels of pupil information retention, and teachers reported that the visual nature of AR helped complex concepts 'click', provided content remained tightly aligned with curriculum standards and performance measures. The pilot also underscored the need for external collaborators, as teachers lack the time to master rapidly evolving software, with emerging AI pipelines expected to further democratise the creation of curriculum-aligned AR content.

Case study: Evidence-based piloting and validation

An interviewed Trust uses a rigorous piloting stage to bridge the gap between initial interest and trust-wide adoption. When a tool, such as a new AI chatbot, is requested, the Trust moves beyond technical vetting to a functional pilot. This involves a small testing group typically composed of the requesting teacher and two teachers from different schools to ensure the tool's effectiveness across diverse settings.

During the pilot, the Trust evaluates the tool's pedagogical impact, specifically distinguishing between 'active' learning and 'passive' technology use. A unique feature of this stage is the inclusion of stakeholder feedback; the Trust invites students, teachers, and a small group of parents to provide a full view of the tool's impact and

safety. Only after this evidence is quality-assured does the Trust decide whether to scale the solution or discontinue it based on usage data and student outcomes.

3.3.4.1 Common barriers at this stage

While piloting is recommended to mitigate risk, it is often skipped or curtailed due to operational constraints:

- **Resource imbalances:** schools vary significantly in their capacity to run meaningful pilots due to differences in funding, staffing, and infrastructure. Even when pilots are free of charge, schools often cite the required staff time as a key barrier.
- **Insufficient teacher training for pilots:** successful piloting requires participants to be adequately trained on the technology. While most schools provide training via INSET (in-service training) days or drop-ins, if this is not targeted at the pilot group, user frustration can be misattributed to the tool's failure rather than a lack of preparation. A sector representative emphasised the importance of providing in-person piloting opportunities, which they described as ‘roadshows’.

> It could be really innovative and impactful. There’s a lot of value in face-to-face, personal contact, not just online. Being in front of someone and actually talking to them is different from interacting purely through a screen.
>
> *Sector representative*

- **Lack of technical support:** Interviews highlighted that many suppliers, particularly smaller companies, are unable to provide extensive customer support. In the event of technical problems, which are common during pilot projects, schools may be left without sufficient support to resolve issues quickly. The nature of these issues varies. Some relate directly to the product and are within the supplier’s control, such as platform performance or usability. Others depend on the school’s own digital infrastructure and capacity, for example, integrating a tool with existing systems such as single sign-on, managing devices, or configuring network settings. In these cases, resolution may require in-school technical expertise rather than supplier intervention. Where adequate support is not available, even minor issues can disrupt teaching and undermine confidence in the tool. If teachers are required to troubleshoot problems themselves, this can lead to frustration and may result in an incomplete or inaccurate assessment of the technology’s potential.

3.3.5 Stage 5: Procuring and accessing

After making an informed decision and drawing on evidence from piloting and trialling, schools then move to formal procurement. As gathered from interviews, there is significant variation in how procurement processes take place, depending on the school, the size and value of the contract, and the type of service being procured.

Key activities mentioned by schools in relation to procurement and accessing include completing required procurement steps, such as obtaining quotes, using approved supplier routes or frameworks, or undertaking tender processes, depending on contract value and compliance requirements. Some interviewees reported drawing on national support, including DfE's Get Help Buying for Schools service, which provides advice and access to approved procurement routes, particularly for larger or more complex purchases.

Schools then agree on pricing, licensing, and contract terms, including renewal conditions and any included training or support. This is followed by confirming data protection, security, and safeguarding arrangements, clarifying responsibilities and access controls. Finally, practical onboarding steps are completed, including setting up and managing user accounts, assigning permissions, and establishing review processes where necessary.

3.3.5.1 Common barriers at this stage

Interviews identified a wide range of operational barriers at this stage:

- **Complex procurement processes:** the complexity of school procurement depends largely on contract value and internal financial rules, primarily dictated by the 2026 Threshold Amounts Guidance. Lower-cost EdTech purchases (typically below £10,000) are usually straightforward, often requiring only a single quote or catalogue price and Headteacher approval, allowing schools to test new tools quickly. However, this is not always the case for assistive technology or specialist tools intended for individual pupils with SEND. Even at similar cost levels, these purchases may involve additional funding constraints or alignment with statutory provisions, which can make approval more complex. Furthermore, complexity increases for mid-range purchases (for example, £10,000 to £50,000), which usually require three written quotes, and for high-value contracts (above the 2026 sub-central threshold of £207,720), which require a full formal tender under the Procurement Act 2023. Multiple approval stages, limited central guidance, and variation in local authority processes can delay decisions, particularly for smaller schools, while MATs may benefit from centralised procurement capacity. Suppliers also face challenges due to long and complex procurement cycles. The schools and other stakeholders often linked the complexity to the lack of standard templates for mid-range bids and the difficulty smaller schools face in assessing 'most advantageous tender' criteria, rather than focusing only on price.

> Procurement in England is so fragmented that you're basically going door to door, selling to individual schools. If every school is asking for something different, that's really hard for a small business to manage. One of the big challenges is that there's no common standard for what 'good' looks like from an impact or evidence perspective, which makes things tricky.
>
> *EdTech expert*

- **Data privacy and security concerns:** schools are legally responsible for ensuring suppliers comply with UK GDPR and safeguarding standards. However, many staff lack the expertise to assess privacy policies or contractual data-processing clauses, heightening risks around data sharing and algorithmic bias. Unclear vendor transparency can heighten risks around consent, data sharing, or algorithmic bias. Leaders cite concerns about the security of documents and systems as a major challenge, particularly for those not yet fully cloud-based.
- **Budget constraints:** affordability remains a primary determinant. Upfront costs, especially for advanced tools and hidden expenses, such as training, can exceed budgets.

3.3.6 Stage 6: Deploying and integrating

After procurement and integration, schools tend to move to introducing the tool into everyday use in a reliable and manageable way. The focus is on setup, integration, and early support, so the tool fits established routines, rather than adding friction. This stage is typically led by technical support and teaching staff, with input from EdTech suppliers and support from school leadership.

Key activities mentioned by schools in relation to deployment and integration include preparing systems and access, such as configuring devices, permissions, and integrations with existing platforms (for example, MIS, learning platforms, or single sign-on systems). Schools then introduce the tool to staff and pupils through clear, practical guidance focused on expected use.

Schools described that effective implementation involves integrating the tool into existing routines, clarifying where it replaces rather than duplicates current practice. Early support is provided through technical assistance, peer support, named leads, and supplier input where required. Schools also monitor initial use to identify emerging barriers, workload implications, or unintended consequences and address these promptly.

3.3.6.1 Common barriers at this stage

Interviewees described how deployment failures often stem from infrastructure and skills deficits:

- **Underfunded or overstretched infrastructure**: Some interviewed schools described technology environments that have grown organically rather than strategically, resulting in fragmented systems that place pressure on staff and administrative capacity. These challenges can be compounded by low levels of digital and data maturity, where limited internal capacity or inconsistent data practices increase the burden on staff. This manifests in two ways. At the level of physical infrastructure, the Technology in Schools Survey 2024-25 found that while connectivity has improved, gaps remain, particularly in primary schools, where fewer meet DfE connectivity and wiring standards, and devices are less consistently fit for purpose. At the level of data infrastructure, many schools manage multiple disconnected systems for registers, payments, and performance tracking, creating administrative burden and interoperability challenges. The market has begun to respond through data integration services that enable information to be shared more easily between systems. However, adoption varies, and where underlying systems or data practices are weak, these solutions may not fully resolve fragmentation. When core systems or devices fail during lessons, teaching can be disrupted immediately. Meanwhile, siloed systems that require manual data handling can create an ongoing administrative burden and erode confidence in digital tools over time.

- **Teacher skills gaps:** interviews indicate that there is a wide variance in digital literacy across the workforce. Many school leaders report that a lack of staff confidence acts as a primary inhibitor to technology adoption, often resulting in the underuse of advanced features or an active resistance to pedagogical change. This aligns with the findings from the Technology in Schools Survey 2024-2025, which showed that compared with 2023, fewer school leaders felt that most of their staff were confident using technology. Some associated this lack of confidence with the fast-evolving nature of EdTech and AI in the classroom.

Case study: Reducing data friction through consolidation and strict interoperability

A school leader at a Local Authority Maintained Primary School describes a major infrastructure overhaul driven by the need to reduce administrative complexity. Previously, the school's data landscape was fragmented across "five or six different pieces of software" - separate systems for registers, payments, and performance tracking- hosted on a physical on-site server.

Over 12 months, the school migrated from their legacy supplier to a cloud-based MIS. This move was a strategic shift to a fully hosted environment, enabling staff to access secure documents and complete planning, preparation, and assessment remotely, a flexibility impossible with the previous on-site infrastructure.

Recognising the risks of a major data migration, the school adopted a 'stress-test'

approach to implementation. Rather than consulting only digital champions, they deliberately sampled a cross-section of staff, including teachers who struggled with technology, thereby reducing the risk of resistance during the rollout.

Leadership now enforces a strict procurement policy where third-party tools are rejected unless they support automated integration. This ‘interoperability threshold’ protects the school's administrative capacity from challenges relating to manual data handling:

> "The school doesn't implement any third-party apps or any tech unless they use a data integration automation, because having to manually do it is a nightmare. It took a long time to get the supplier world geared up to the whole idea... [but it is now essential]."

3.3.7 Stage 7: Adopting and training

Once tools have been deployed and integrated, schools have noted that they switch their focus to consistent adoption and ensuring that all relevant stakeholders are trained so they feel confident using them. This often requires active participation from teaching staff, school leadership, and SEND and inclusion specialists, with input and support from IT and technical teams.

Key activities mentioned by schools in relation to adoption and training include establishing shared expectations about when, how, and why a tool should be used, and where its use is optional or inappropriate. Schools provide structured, role-appropriate training focused on everyday tasks and effective practice, allowing time for hands-on experience and questions.

Ongoing learning is supported through peer networks, follow-up sessions, and accessible guidance materials. Schools also monitor variation in uptake, identifying and addressing barriers related to confidence, time, access, or workflow. Effective practice is reinforced by sharing examples, aligning use with wider Continuing Professional Development (CPD)[15] priorities, and updating guidance as understanding evolves.

[15] Continuing professional development (CPD) is defined as learning experiences which help you develop and improve your professional practice.

Case study: Staff compliance and guidance for AI use

One interviewed Trust manages the use of technology, specifically AI, through a formal policy that all staff must acknowledge. It uses an online platform that hosts an electronic version of the policy. Every staff member is required to read and electronically sign this policy. The central team is notified when the policy has or hasn't been signed, allowing them to track completion across the workforce.

In addition to the policy, the Trust has created a 'guidebook' containing new guidance and information. To keep pace with wider changes within education and technology, this guidebook is updated every three months.

Case study: 'Blended Learning Champions' model

To support effective implementation at the school level, the Trust has also established a network of 'Blended Learning Champions'.

The Tech Lead meets with these champions every half-term to maintain a consistent conversation and awareness of what is being used across the schools.

Champions are responsible for cascading information from the Trust meetings back to their individual schools.

Peer support: champions encourage the use of apps and platforms through:

- Staff meetings and training: leading their own sessions for colleagues.
- Drop-in sessions: providing support for staff who are unsure or "scared" of using new technology.

3.3.7.1 Common barriers at this stage

- **Poor alignment with curriculum:** tools must align with the specific sequencing of the curriculum. Technology that is not closely linked to curriculum goals rarely becomes part of regular teaching.

> If you are going to make this [EdTech Implementation] work, thorough onboarding isn't just about giving someone access to the product; it's about understanding the product's use in the curriculum, planning for its use in the curriculum, and planning for wider training.
>
> *EdTech supplier*

- **Leadership engagement and digital culture:** without visible support from senior leaders, enthusiasm can fade once initial projects end. Successful adoption requires a digital culture driven by leadership. Research on early adopters of AI in

schools highlights the importance of assigning internal ‘champions’, typically teachers or digital leads, who encourage experimentation, share emerging practice, and support colleagues in adopting new tools. Digitally mature schools are characterised by a clear focus on how technology can improve pupil outcomes.

- **Limited time for staff training:** Many schools expressed that they have limited time to take part in training, as their schedules are largely focused on providing direct support to pupils. This can make it difficult for schools to release staff for professional development, even when training is necessary for the effective implementation of new tools.

> The challenge always with training support staff is being able to release them to train them because they are so busy supporting children… that is very difficult to find time to do training.
>
> *School Leader*

Case study: Moving from ad-hoc training to embedded support

A special educational needs school with pupils aged 4-19 outlines its strategy for digital adoption. The school identifies staff confidence as a ‘massive barrier’ to its improvement plan. Many staff members struggle significantly with basic technology use, creating a friction point between the school's strategic goal - improving the computing curriculum - and the daily reality of classroom practice. The leadership notes that traditional ‘show and tell’ training methods fail because: "if you just show them how to do it, it doesn't go in at all."

To address this, the school moved away from passive demonstrations to a hands-on training model designed to build muscle memory and confidence:

- **Step-by-Step practical sessions:** staff are required to bring their own devices to group sessions to follow processes in real-time. The leadership emphasises that this often requires following up two or three times individually, rather than relying on a single large-group presentation.
- **Physical reference guides:** recognising that retention is an issue, the school creates printed ‘how-to’ guide sheets for staff to keep on hand.
- **Safe ‘sandboxing’:** during the migration to a new MIS, staff were given access to a ‘dummy site’ to practise without fear of breaking live data. This was supported by a phased training schedule: a full initial session, followed by recaps in September and December to reinforce learning.

The school found that pedagogical benefits alone were insufficient to motivate anxious

staff. Instead, they focused on the tangible promise of workload reduction.

When selecting a new evidence-collection system, they prioritised the simplicity of the app's interface over complex functionality, contrasting it with a previous system that was "quite confusing to use." The leadership successfully pitched the new system by highlighting its ability to support them in writing reports, transforming the tool from an administrative burden into a time-saving asset.

New tools for Social, Emotional, and Mental Health (SEMH) were purchased specifically because teachers requested help in that area, ensuring that the learning curve was accepted as a necessary step to solve a problem staff had identified.

Despite the success of the training strategy, the school highlights that skills training cannot function in isolation from infrastructure investment. The implementation of new systems exposed the fragility of their hardware estate:

> "As we've moved to this new system, we found more and more failing devices, which meant that when teachers wanted to teach lessons, they didn't have access to devices, and they got frustrated."

This case demonstrates that in low-confidence environments, training must be treated as a continuous process rather than a one-off event. By combining 'high-touch' support with clear workload benefits - and backing it with necessary hardware investment - the school has been able to move its digital strategy forward despite significant initial resistance.

3.3.8 Stage 8: Measuring and evaluating

Some schools said they carry out impact assessments over time once a tool is fully in use. Some see this as a core step, while others describe it more as an aspirational best practice. Evaluating impact requires input from almost all relevant stakeholders, including school leadership, teaching staff, pupils, SEND and inclusion specialists, IT teams, and the EdTech suppliers.

Key activities mentioned by schools in relation to review and evaluation include examining patterns of use alongside feedback and observations of practice. Schools assess impact against identified needs and goals, drawing on baseline and follow-up indicators such as attainment, engagement, or efficiency, and considering variation across pupil groups where relevant.

Evaluation is often structured using available guidance or frameworks, including national standards and implementation guidance (for example, DfE-commissioned reviews. Based on these findings, schools identify improvements and next steps, which may involve refining practice, providing additional training, expanding use, or discontinuing tools where

impact is limited. Findings and decisions are documented to inform future planning and procurement.

3.3.8.1 Common barriers at this stage

The final stage is the most frequently neglected, often due to a lack of capacity and clear metrics established at the outset. This is reflected in wider evidence. The Technology in Schools Survey 2024–25 found that a substantial proportion of respondents, including teachers, did not know whether their assistive technology devices were fit for purpose (39%), suggesting limited visibility over impact and effectiveness.

- **Lack of systematic evaluation frameworks:** schools shared that they find it difficult to comment on the impact of technology on pupil attainment, cost savings or teacher workload. Without established frameworks, evaluation becomes anecdotal rather than data-driven.

> The main difficulty suppliers face in the UK is a lack of clarity about expectations and what bar they are meant to meet. As a result, there are lots of different definitions of what 'good' looks like. From a supplier's perspective, it is confusing: one group wants a particular badge, another says the product has to do something else, and others want a piece of research before they will invest. When everyone is asking for different things, it makes it hard for suppliers to know where to focus.
>
> *EdTech expert*

- **Limited data from companies:** schools described the lack of clear information about how deeply tools are actually used as a major barrier. They find it challenging that providers often share high overall user numbers to support contract renewals, but these figures do not usually show the difference between quick logins and meaningful, ongoing use in teaching and learning. This lack of detailed data makes it hard for school leaders to judge whether a tool delivers value throughout the year or is mainly used for short-term revision. Without more detailed usage insights, schools risk renewing subscriptions for platforms that see heavy seasonal drop-offs instead of consistent educational impact.

Case study: Measuring usage data and performance

A leader at a MAT outlines a systematic approach to procurement driven by tightening budgets. In this financial climate, the Trust has moved away from purchasing technology based on novelty, focusing instead on three core metrics: cost, usability, and demonstrable usage. The Trust has identified usage analytics as the primary tool for assessing value for money, specifically to counter the assumption gap where schools pay for software that staff rarely use. It was noted that usage data often reveals uncomfortable truths about expensive subscriptions:

> "The usage data has been really useful because… You assume teachers are using it, and actually, when you look at the usage, they're not. And yet you're paying for something that's quite expensive."

When defining what constitutes a ‘good’ tool, the Trust prioritises simplicity and inclusivity over complex feature sets. "Sometimes the simple ones are the best," the Tech Lead notes, "they have the biggest impact." Despite robust processes for piloting tools and tracking usage, the Trust acknowledges that measuring educational impact remains a challenge. The Tech Lead admits that while they can track logins, knowing whether a tool is genuinely helping students meet learning objectives often still relies on the intuition of practitioners rather than hard data:

> "Is there a noticeable benefit from using this technology in the classroom? …How consistent or evidence-based [is that judgment] beyond the gut feel of a lot of classroom practitioners? I don't really know."

4. Conclusions and recommendations

4.1 Key conclusions

This section summarises the overarching findings from the report. Since the 2022 report, the technology landscape and policy context surrounding digital education have evolved significantly. The rapid growth of AI and adaptive learning tools, changing hardware capabilities, and wider developments across the technology sector have influenced both the types of technologies available and the ways they are used in schools. At the same time, consequent policy discussions have increasingly focused on issues such as digital inclusion, support for pupils with SEND, and the effective implementation of technology in education.

This report updates the baseline formulated by the 2022 report by combining new company data and school usage analysis with stakeholder interviews and engagement across the sector. This analysis provides a more detailed understanding of how the EdTech market in England has and will continue to evolve based on present adoption metrics. Further details on the methodology and evidence base are provided in Section 2 and Appendix 1.

4.1.1 Supply

The EdTech supplier market in England appears stable and mature, with a continued focus towards more advanced technologies, particularly AI-enabled tools and sophisticated hardware solutions. The UK has approximately 1,123 EdTech companies, with strong representation across all categories. Reflecting on wider technology sector trends, investment and product development in the sector are increasingly concentrated in technologies that support automation, analytics, and personalised learning.

This research has developed an updated EdTech company database and refined the taxonomy to provide a more accurate and current view of the supplier landscape. The revised classification reflects changes in the sector since 2022, including the emergence of new technologies and evolving product categories. It also provides a stronger basis for tracking trends in the composition and development of the EdTech sector over time.

The analysis indicates continued investment activity and a substantial workforce across the sector. Official company reporting provides a conservative estimate of workforce size (with available data showing 29,660 people working for the identified 1,123 EdTech companies). Wider modelling suggests that the total workforce engaged in EdTech activity may be significantly larger than company filings alone indicate.

Growth patterns vary across EdTech market verticals. Assessment technologies represent the fastest-growing segment, reflecting strong demand for tools that support

automated marking, real-time analytics, and workload reduction for teachers. At the same time, personalised learning technologies are attracting the highest levels of investment, indicating strong investor interest in tools that tailor learning content, pacing, and feedback to individual learner needs.

However, some areas appear comparatively under-invested relative to their demand and policy relevance. In particular, assistive and inclusive learning technologies show consistent demand from schools but comparatively low levels of private investment compared with other EdTech verticals.

4.1.2 Demand

Analysis of usage data from the EdTech Impact school sample provides a rare view of how digital tools are used in practice. While procurement and survey data typically show what schools purchase, this dataset captures recorded engagement with platforms, offering insight into how technology is embedded in day-to-day school activity. It is important to note that the data is drawn from a single MAT and is therefore not representative of the wider school system.

The findings show that tools within the **Management and administrative efficiency vertical are the most consistently used**. Systems such as MIS and operational utilities underpin daily functions, including student registration, behaviour tracking, and account provisioning, providing the operational infrastructure that supports school activity.

By contrast, tools within the **Foundational learning and Assessment technologies verticals generate the greatest volume of instructional engagement.** Curriculum and subject-specific platforms are used extensively during lessons and homework, often involving sustained periods of activity. Usage patterns vary depending on pedagogical purpose: some tools support short bursts of engagement, such as retrieval practice, while others enable extended learning sessions or structured independent study.

Despite the large number of EdTech providers operating in the market, actual usage within schools is concentrated around a relatively small set of widely adopted platforms. In the analysed dataset, the ten most used tools account for more than half of the recorded activity, while many other technologies appear only occasionally across the sampled schools. The data also shows that schools frequently combine specialist education technologies with general digital platforms in their workflows.

Finally, the dataset indicates the emerging presence of GenAI tools within school technology ecosystems. Platforms such as ChatGPT, Claude, Perplexity and Gemini appear among the frequently used GenAI tools in the sample. While adoption remains uneven and evidence of safety and impact is still developing, these tools appear to be increasingly integrated into both teacher workflows and pupil learning activities. Qualitative findings also highlight the growing influence of global technology platforms and state-

backed tools within the sector, shaping the competitive environment for domestic EdTech providers.

4.1.3 EdTech decision making and implementation

The adoption of EdTech in schools is shaped primarily by schools' capacity to evaluate, procure, and implement them effectively. Across the evidence gathered in this study, several recurring challenges influence how schools make decisions about EdTech and how successfully technologies are integrated into practice.

First, strategic planning and capability gaps remain an important constraint. As described in the Technology in Schools Survey 2024–25, a fifth of primary schools and 7% of secondary schools lack a digital strategy and therefore are likely to face gaps in digital and AI literacy, which may limit their ability to assess the potential value of new technologies and implement them effectively.

Second, infrastructure and integration constraints continue to affect adoption. Legacy infrastructure, bandwidth limitations, and interoperability challenges between systems can slow implementation and increase the risks associated with introducing new technologies.

Third, evidence and evaluation challenges shape how schools select technologies. Many schools report limited access to consistent frameworks or data to evaluate the long-term impact of EdTech on learning outcomes, cost savings, or teacher workload. As a result, decision-making is often influenced by **peer networks and word of mouth**, particularly where formal evidence is limited or difficult to access.

Finally, approaches to piloting and evaluating new technologies vary across the sector. While some schools run structured pilots and monitor usage data before wider adoption, others have limited capacity to conduct formal evaluation, which can lead to variation in how technologies are selected and implemented.

4.2 Recommendations: future support and interventions

This section sets out practical actions to strengthen the English EdTech ecosystem across investment, adoption, evidence, and community, focusing on clearer markets, faster adoption of effective tools, stronger evidence, and better system-wide collaboration.

4.2.1 Driving adoption of EdTech tools

As discussed throughout this report, the benefits of EdTech depend on effective adoption and implementation within schools. The following recommendations focus on reducing barriers to adoption and supporting schools to implement EdTech more effectively.

Publish a clear national EdTech roadmap

Technology is increasingly embedded in teaching, learning, and school administration. While guidance and initiatives exist, including the DfE digital and technology standards for schools and colleges, and a commitment to develop a digital and data skills pathway set out in Every Child Achieving and Thriving, there is no single national framework that defines priority education technologies, their intended use cases, and indicative timelines for adoption across the school system. Furthermore, it is not always clear how these initiatives relate to each other or support different stages of technology development and adoption. Additional support is available through the Plan technology for your school service, which helps schools assess needs and put infrastructure in place to enable their EdTech journey, alongside recent guidance on the use of GenAI in education. However, these resources all remain distributed across multiple government programmes, and there is no overarching roadmap that clearly sequences adoption or defines system-wide priorities.

The lack of a coordinated roadmap creates uncertainty for schools and technology suppliers, making it more difficult to plan investments, build staff capability, and scale technologies that demonstrate educational value. Findings suggest that a national EdTech roadmap as an essential asset for providing clearer strategic direction, and helping schools to align infrastructure development, procurement decisions, and workforce skills with national priorities for digital innovation in education. As a result, the DfE should prioritise developing a national EdTech roadmap in partnership with key sector representatives, such as schools, MATs, teacher representative bodies, EdTech suppliers, industry organisations, and research organisations.

Reduce cost barriers to advanced technology hardware adoption

Assistive technology for pupils with SEND, particularly those with complex or low-incidence needs, often involves high costs. Some essential devices, such as Braille notetakers, can cost several thousand pounds. These are not experimental tools but are necessary for access to learning. Even where need is clearly identified, schools may face delays while securing funding from multiple sources. This can slow access for pupils and lead to uneven provision across the system, regardless of a school's overall level of resourcing.

Emerging technologies such as AR and VR also have potential to support learning and, in some cases, SEND provision, for example, by allowing pupils to practise real-world skills in a safe environment. However, evidence of their impact is still developing, and high upfront costs make them difficult for many schools to adopt.

Existing initiatives show how access can be improved. Programmes such as the IT Reuse for Good Charter and the National Device Bank redistribute refurbished devices. In addition, the DfE's assistive technology lending library pilot, which aims to support children with SEND, demonstrate how shared access models can reduce upfront costs and improve the availability of specialist equipment. A positive future development would be a similar programme for more sophisticated hardware, especially AR and VR headsets or

projectors as they become more commonly used across the sector. Such an initiative could be a joint initiative led by the DfE and key delivery partners, such as technology manufacturers, procurement marketplaces, refurbishment providers, EdTech suppliers, and participating schools and MATs.

Link DfE-funded EdTech pilots to structured staff training and scaling plans

As highlighted in Section 3.4 on the EdTech implementation journey, successful adoption depends on teachers' confidence and capacity to integrate technology effectively into teaching and learning.

The DfE is continuing to fund innovation programmes that test and evaluate emerging tools and technologies in real education settings, including the EdTech Testbed Programme. These pilots provide participating institutions with access to tools and implementation support to trial emerging technologies in real education settings. However, the primary focus of pilot programmes is often on evaluating the effectiveness of the technology itself. As a result, there may be opportunities to strengthen the role of structured professional development and implementation planning within these programmes to help schools embed successful tools more effectively across their organisation. DfE has already committed to the development of a digital and data skills pathway, which will be integrated into existing professional qualifications, and has published support materials for the safe and effective use of AI.

Embedding clearer expectations around staff training and organisational scaling within EdTech pilots could help increase the likelihood that successful technologies move beyond small-scale trials and deliver sustained impact across the education system.

This would be a joint initiative led by the DfE and key delivery partners, such as education research organisations, teacher training providers, EdTech companies, and participating schools and MATs.

4.2.2 Supporting investment into the EdTech sector

A strong EdTech ecosystem requires sustained innovation and investment. Investor confidence is shaped by factors such as market signals, evidence of impact, and the perceived maturity of different EdTech segments. The following recommendations focus on strengthening dialogue between policymakers, schools, and investors, and supporting investment in areas with significant potential educational impact.

Strengthen networks and insights with EdTech investors

Currently, there are limited structured opportunities for ongoing dialogue between policymakers, the school sector, and EdTech investors. As a result, investors may have limited visibility of schools' priorities and procurement realities, while policymakers may have limited insight into broader developments in the technology investment landscape.

Improving communication between these groups could help align innovation, investment, and education priorities.

As such, it would be beneficial to establish more regular forums for engaging with investors, to facilitate dialogue between EdTech investors, policymakers, and representatives from the school sector. The purpose of this forum would be to build mutual understanding of schools' needs, procurement dynamics, and broader technology market trends. As an example, similar forums have been established by MHCLG in the PropTech sector, such as the PropTech Steering Board or its partnership with the UK PropTech Association.

This would be a joint initiative led by the DfE with participation from EdTech investors, venture capital firms, EdTech companies, school leaders, MATs. and organisations supporting innovation and investment, such as Innovate UK or the British Business Bank.

Promote high-impact and under-invested EdTech verticals

Analysis of the EdTech market suggests that investment is unevenly distributed across different technology verticals, as highlighted in Section 3.1.3.2. While some areas attract substantial levels of investment, others with potential to deliver significant benefits for learners receive comparatively limited funding. For example, assistive and inclusive learning technologies account for around 80 companies employing approximately 588 people in the UK and generating £96 million in turnover, yet they have attracted only £8.6 million in investment. This is significantly lower than investment levels in several other EdTech verticals with comparable or smaller numbers of companies. At the same time, supporting pupils with special educational needs and disabilities is a key priority within the education system.

To tackle this, DfE could work with partners to explore ways to stimulate growth investment into currently under-funded verticals, including assistive and inclusive technologies. While other parts of the assistive technology market, particularly for older adults, are supported by departments such as Department for Work and Pensions, there is an opportunity to strengthen focus on education-specific use cases. DfE could use existing programmes, such as the EdTech Testbed Programme, the assistive technologies lending library pilot or promote their potential to investors and startups through DfE engagement channels.

This would be led by the DfE, working with schools, MATs, EdTech suppliers, investors, and innovation partners such as Innovate UK and Oak National Academy.

4.2.3 Building the evidence base for EdTech

Clear and credible evidence is essential for schools, policymakers, and suppliers to make informed decisions about education technologies. While initiatives are emerging to strengthen the evidence base, further work may be needed to improve how evidence is

generated, evaluated, and applied in practice. The following recommendations focus on strengthening the evidence ecosystem for EdTech.

Embed consistent evidence expectations for EdTech across the education system

Schools and MATs currently apply varied expectations when assessing the evidence behind EdTech products. As a result, both schools and suppliers often lack clarity about what constitutes credible evidence of impact and value for money. Initiatives such as the EdTech Evidence Board, delivered by the Chartered College of Teaching with support from the DfE, have developed evaluation criteria for assessing EdTech tools. This report recommends building on these expectations and embedding them more consistently across procurement and adoption decisions.

The EdTech Evidence Board's Evaluation Criteria assesses products across six dimensions: educational need, theory of change, evidence of impact, implementation and usability, data protection and safeguarding, and value for money. Together, these provide a strong foundation for evaluating EdTech. However, further work may be needed to support the consistent application of these criteria across schools and trusts, and to clarify how suppliers can generate evidence aligned with the framework. This could be achieved by promoting the Evidence Board criteria as a common reference framework, providing guidance to schools on how to apply them in procurement decisions, and using insights from DfE-funded pilot and testbeds programmes to illustrate both evidence generation pathways and realistic pricing expectations. This could be led by the DfE working with the EdTech Evidence Board, education researchers, schools, MATs, and EdTech suppliers.

Improve transparency of EdTech procurement and usage data

Understanding how schools purchase and use EdTech at a market level remains difficult due to fragmented and limited data. Available sources, including surveys, supplier reporting, and programme returns, are often incomplete and not comparable across institutions.

Some visibility exists through current frameworks. Maintained schools report spending through the Consistent Financial Reporting (CFR) framework, with DfE introducing more granular technology categories (codes E20 and CE04) from 2024 to 2025[16]. Academy-level financial data is captured through Academies financial returns (ACAD) dataset, while trust-level consolidated finances are reported through the CS dataset[17]. These datasets then feed into DfE's Financial Benchmarking and Insights Tool (FBIT)[18]. However, these

[16] Consistent Financial Reporting (CFR): Standardised financial returns submitted annually by local authority–maintained schools in England, detailing income, expenditure, and balances using the DfE's Consistent Financial Reporting framework.

[17] Academies (ACAD): Financial data reported at the individual academy level through statutory academy financial returns submitted to the DfE. Academy Trusts Consolidated Sector (CS) are trust-level consolidated financial information submitted by academy trusts to the DfE, covering all academies within the trust.

[18] The DfE's Financial Benchmarking and Insights Tool (FBIT) is a free, online service for schools, academies, and trusts in England to analyse, compare, and improve their financial performance.

sources remain too high-level to identify EdTech spend clearly, which is often spread across multiple categories.

Sector platforms such as EdTech Impact provide additional insight through usage data and reviews, but overall visibility remains partial. Without more direct data sharing from schools and suppliers, a complete picture of the market is difficult to achieve.

Given these constraints, this report recommends that the DfE explore ways to improve transparency over time. This could include collaboration with schools, MATs, sector data platforms (for example, EdTech Impact), and procurement or advisory organisations (especially framework providers) to test approaches to data sharing and aggregation. Initiatives promoting direct data collection from schools will need to identify ways of collecting data while minimising additional administrative burden on schools. Likewise, initiatives focused on using procurement data should align with wider government objectives to promote procurement transparency, especially through the Procurement Act.

Either way, any approach would need to be proportionate and reflect practical and commercial limits. However, even incremental improvements could support better market understanding and more informed policy, research, and investment decisions.

Assess the long-term impact of personalised learning tools

This research has found that there are EdTech verticals where the underlying evidence base remains limited, especially when compared with the amount of investment and product development taking place. One such area is personalised learning technologies, particularly those incorporating AI. These tools are becoming increasingly prominent in the EdTech sector; however, there is still limited evidence regarding their long-term impact on learning outcomes, particularly in relation to general-purpose AI tools now widely used by both students and teachers.

Strengthening the evidence base in this area would support schools and policymakers in making more informed adoption decisions. It would also help ensure that future investment and innovation in personalised learning technologies are guided by robust evidence. Evaluation approaches could include longitudinal studies examining learning outcomes over time, comparative trials between personalised learning tools and general-purpose AI tools, and rigorous impact studies conducted in partnership with schools and MATs. Insights generated through initiatives such as the EdTech Testbed Programme could help to identify priority technologies for evaluation and support the development of evidence aligned with the expectations outlined through the EdTech Evidence Board framework.

This could be led by the DfE working with education research organisations and universities, schools and multi-academy trusts participating in evaluation studies, and EdTech providers whose tools are being assessed.

Reduce procurement and adoption friction for EdTech

Procurement processes can be complex and time-consuming, and smaller schools in particular may lack the capacity to assess contracts, pricing structures, and product claims. While support mechanisms exist, such as DfE's Get Help Buying for Schools and procurement frameworks provided through the Crown Commercial Service, schools may still find EdTech procurement difficult.

Rather than creating entirely new procurement structures, there is an opportunity to build on existing support by improving how information is presented and used. This could include clearer, EdTech-specific guidance, practical examples of procurement approaches, and better access to comparable information on pricing, evidence of impact, and user experience. There may also be value in exploring more structured ways to present this information, for example, through curated catalogues or comparison tools.

DHSC recently led a large-scale market engagement process with suppliers of adult social care technology systems to local authorities, to help shape future specifications and procurement approaches. DfE could explore similar approaches to co-defining specifications and procurement approaches with EdTech suppliers.

This could help to ensure that guidance was based on clear specifications or outcome frameworks, and minimise the risk of duplicating tools already available in the market.

Again, any approach would need to be proportionate and developed in collaboration with schools, suppliers, and procurement partners to ensure it adds practical value and reflects existing capacity

Assess the role of NGOs in the EdTech ecosystem

Research conducted for this report highlights the important role that NGOs can play within the EdTech ecosystem. In some cases, NGOs support the development, implementation, and scaling of education technologies, while in others they provide training, resources, or delivery models that complement commercial EdTech solutions. However, the scale, scope, and impact of NGO-led activity in the EdTech sector are not yet well-understood.

A clearer understanding of this landscape could help policymakers to identify opportunities for collaboration and better understand the unique value that NGOs may bring to the development and delivery of education technologies.

Future work could therefore assess the NGO EdTech sector, including mapping organisations active in this space, examining their delivery models and areas of expertise, and evaluating their contribution to innovation, implementation, and capacity-building within the education system.

This work could be led by the DfE, working with research organisations, NGOs active in the education technology sector, and education sector partners.

4.2.4 Growing the EdTech Community

A healthy EdTech ecosystem also depends on collaboration between educators, technology providers, researchers, and policymakers. The following recommendations focus on strengthening connections and engagement across the EdTech community.

Leverage existing sector communities and events to support structured evidence sharing and practical learning.

Existing forums, professional networks, and conferences, such as the Bett show, currently connect educators, technology providers, and researchers to discuss innovations in education technology. However, these interactions are often informal and may not consistently translate into practical learning for schools.

Building on existing communities and events could help support more structured knowledge exchange across the EdTech sector. This report, therefore, recommends leveraging established forums to share practical insights from EdTech research, pilots, and school deployments.

This could include dedicated sessions within sector events and professional networks that focus on implementation lessons, evidence from EdTech programmes, and practical experiences from schools using technology in different contexts. Such discussions could help translate emerging evidence into actionable insights for educators and support more informed adoption decisions.

Support regional or thematic cohorts of schools to enable collaborative EdTech adoption

Existing collaboration structures, such as MATs, teaching school hubs, and the Research Schools Network, already play an important role in supporting collaboration and the use of research evidence across schools. Building on these structures, there may be opportunities to support regional or thematic cohorts of schools focused specifically on EdTech, enabling schools to share experiences, jointly evaluate emerging tools, and learn from one another's implementation approaches.

Such cohorts could be particularly valuable for smaller schools that may have limited capacity to independently evaluate and procure EdTech tools. In addition to shared learning, they could also explore collective approaches to procurement, helping reduce duplication of effort and supporting more informed adoption decisions.

This could be facilitated by the DfE working with regional school networks, multi-academy trusts, teaching school hubs, and sector organisations.

Create safe, non-commercial supplier engagement spaces

Schools and EdTech suppliers already interact through sector events, exhibitions, and procurement processes. Events such as the Bett Show and other national and

international EdTech forums have increasingly moved beyond purely commercial showcases to include more structured opportunities for dialogue between schools, suppliers, and sector experts. Continued focus on this type of constructive engagement could further strengthen understanding of school needs, implementation challenges, and emerging technology trends.

Creating additional structured, non-commercial spaces for dialogue could support more open and constructive engagement across the EdTech ecosystem. These environments would allow schools to explore technologies, ask questions, and share feedback without immediate procurement pressure, while helping suppliers better understand the priorities and constraints faced by educators.

This could be facilitated by the DfE working with sector organisations, schools, MATs, and EdTech suppliers to run roundtables, innovation forums, or demonstration sessions focused on specific educational challenges, enabling more open exchange between schools and developers.

Appendix 1: Explanation of methods

Section 2 gives an overview of the research methods used for this report. This section explains those methods in more detail, including a discussion of limitations and trade-offs involved in method selection.

In addition to the workstreams outlined below, structured testing and feedback workshops were conducted throughout the synthesis process to ensure rigour and relevance.

- **Lived Experience Board**: provided a detailed critique of the draft taxonomy, focusing on relevance and completeness.
- **External Stakeholders**: (educators, digital inclusion specialists, suppliers, academics, investors, etc.): validated accuracy and feasibility, challenged assumptions, and highlighted emerging innovations not yet captured, explored conceptual coherence and tested the taxonomy's research value.
- **DfE Team:** tested draft outputs for clarity, alignment with strategic aims, and accessibility.

Each feedback session was documented, with iterative refinements made to the taxonomy and outputs. The resulting framework represents a robust, multi-perspective synthesis, ready for finalisation and inclusion in the project's findings.

Notes on the methodology: Some methodological considerations and limitations should be noted. On the demand side, interviews with schools provided valuable insights, but they are not representative of all schools in England. There is also a risk of selection bias, as schools that participated in interviews or events were more likely to be engaged with or interested in technology. As a result, the findings may over-represent schools that are more active in considering or using EdTech, compared with those where technology plays a more limited role.

The findings also reflect a specific point in time, given the rapidly evolving nature of the EdTech market, and are based in part on self-reported information that may not fully capture actual practice. On the supply side, mapping was conducted primarily using publicly available information, meaning that companies with a limited online presence may not have been identified. These and other limitations are discussed in the relevant sections of the report.

A.1.1. Landscape review and gap analysis

First, a landscape review with a focused 'Gap and Change' analysis was conducted to understand how the EdTech market has evolved since the 2022 report. As mentioned earlier, the 2022 report was used as an evidence baseline, particularly its 'Future Priorities and Gaps in the Market' chapter, and systematically compared it with recent policy papers, academic research, and grey literature sources. This method used a structured search strategy to ensure comprehensive coverage of both academic and non-academic

evidence. The searches spanned academic databases, grey literature portals, and industry and government sources relevant to the UK EdTech market.

An example of the search syntax (adapted for each database) is shown below:

> (“educational technology” OR “EdTech”) AND (“England”) AND (“policy” OR “market” OR “innovation” OR “adoption”) OR (AI)

To identify additional relevant studies, a snowball search of reference lists and citations was conducted from key documents identified during the initial screening phase.

Using the structured search strategy described above, searches across academic databases, government publications, grey literature repositories, and sector sources **identified 138 potentially relevant records**. After removing duplicate records and clearly irrelevant results, **108 records remained** for title and abstract screening.

Records were screened against the predefined inclusion and exclusion criteria relating to publication date, geographic focus, sector relevance and language. Following this stage, **36 records were excluded**, most commonly because they focused on higher education, early years education, non-UK education systems, or were published prior to 2022.

The remaining **72 sources were assessed through full-text review**. During this stage, **12 additional records were excluded** because they lacked direct relevance to EdTech policy, market dynamics, or implementation in English schools.

This resulted in **60 sources included in the final landscape review and gap analysis,** as listed in Table 12.

A.1.2 Interviews with expert ‘Lived Experience Board’

To validate and refine the findings from the literature review, the project team established an expert's ‘Lived Experience Board’. The Board was designed to provide continuous practitioner and sector input throughout the project and to ensure that the analysis was grounded in the real-world experience of the EdTech landscape.

Board members acted as expert advisors to the project, drawing on their professional experience to test, challenge, and refine emerging findings as the study progressed. Members were selected from PUBLIC’s existing networks and based on priority topic areas identified through desk research, including emerging technologies such as AI and issues related to trust and confidence in EdTech solutions among educators.

The Board brought together four experts, collectively covering the following areas of expertise:

- EdTech procurement

- Local authority administration
- EdTech consultancy
- AI specialist

Between September 2025 and January 2026, a series of semi-structured workshops was conducted with Board members. These sessions explored how the EdTech market has evolved since 2022, opportunities to better support innovation, and key adoption barriers.

A.1.3 Interviews with EdTech stakeholders

At the outset of the project, a stakeholder map of 100 potential participants was developed, and within that, 70 key contacts were prioritised for engagement to complement the interviews with the Board. The map set out the value proposition of each stakeholder group and identified how their perspectives could best support the research. It also informed the development of tailored interview guides aligned to the expertise of different participants.

All interviews were transcribed and coded using Dovetail, a qualitative analysis platform. Limited AI-assisted features were used only for initial data organisation and were not relied upon for analysis. All coding, theme development, and interpretation were conducted by researchers and reviewed by multiple team members. Any AI-generated outputs from the software were treated as provisional and systematically checked, refined, or rejected to ensure accuracy, minimise hallucination risk, and preserve nuance.

A multi-faceted engagement approach was employed, leveraging several avenues: the established network of contacts, referrals from existing participants, attendance at key events such as Bett and the EdTech Hubs Summit, connections facilitated through the DfE, and targeted cold outreach.

The original sampling strategy aimed to recruit 50 experts. This number was selected to balance a diversity of perspectives with feasibility within the project's timeframe and budget. In practice, the final number of research participants was 58, and the final sample comprised:

- 20 schools
- 24 suppliers
- 14 EdTech experts

A.1.3.1 Demand-side engagement

The engagement process began with the demand-side (users of EdTech solutions), grouping stakeholders into three main categories:

- **Educators:** professionals directly involved in teaching, learning, and school or college leadership.

- **Sector representatives:** individuals or organisations that represent, advocate for, or coordinate groups within the education system. They often act as intermediaries between educators, institutions, and government bodies.
- **Education experts:** individuals with specialised research or policy expertise who contribute to shaping and informing the evidence base and strategic understanding of the education system.

Note on school engagement: Recruiting schools for research can be challenging, as participation depends on schools' capacity, time, and the availability of staff to take part during the research period. This research placed particular emphasis on achieving a representative sample and ensuring balance across geography, school type, and phases.

To support recruitment, a multi-faceted engagement approach was used. This included drawing on established networks of contacts, referrals from existing participants, attendance at key events such as Bett and the EdTech Hubs Summit, connections facilitated through the DfE, and targeted cold outreach. In addition, the research team conducted three rounds of outreach to groups of 50 schools that were randomly selected to support representativeness.

Summaries for the 20 participating schools and trusts are provided in the tables below. These are grouped according to their main educational phase, geographical location, and governance structure.

Table 7: Characteristics of schools included in the interview sample

Characteristic	Sub-category	Count
Geography	Urban	14
Geography	Rural	6
School Type	Academy / MAT	6
School Type	LA Maintained	8
School Type	Independent	5
Phase	Primary	9
Phase	Secondary	7
Phase	Special	2
Phase	Multi-Academy Trusts	2

A.1.3.2 Supply-side engagement

This report engaged with different stakeholders from the ecosystem, including creating, funding, and supplying EdTech solutions. This included:

- **EdTech providers and developers:** those who design, build, and maintain digital tools, platforms, and services used in educational settings, such as learning apps and AI-based tools.
- **Distributors and resellers:** those who market, sell, and deliver these products to schools, colleges, and local authorities.
- **Investors, accelerators, or venture funds:** individuals or organisations that finance and support the growth of EdTech businesses.

Table 10 below shows the types of suppliers interviewed, the number of organisations in each category, and their core functions within the EdTech ecosystem.

Table 8: Types of EdTech suppliers included in the interview sample and their core functions

Supplier type	Count	Core function
Technology suppliers	14	Subject-specific resources, VR/AR, AI lesson planning, and teaching tools.
Procurement and managed services	4	Digital transformation, procurement frameworks and strategic support.
Sector governance, trade & advocacy	4	Trade bodies, unions, and entrepreneurship advocacy.
Investment and evidence platforms	2	Venture capital and evidence-based efficacy platforms.

A.1.4 EdTech market analysis and segmentation

To develop a deeper understanding of the EdTech market, a market analysis was conducted that involved:

- **Developing an EdTech taxonomy,** refined from DfE's 2022 report.
- **Building a comprehensive EdTech company database** from scratch.
- **Conducting a quantitative market analysis** of the full dataset to map the sector's size, employment figures, and economic contribution across the new verticals.

A.1.4.1 Developing an EdTech taxonomy

The 2022 report identified seven market segments: class aid or educator support; digital learning products or content; hardware and devices; resources for parents or pupils; school management; SEND resources; and services.

Since then, the global EdTech market has undergone a transformation driven primarily by the mainstream adoption of AI (particularly GenAI) and the maturation of immersive technologies.

To ensure the 2025 taxonomy accurately reflects these structural shifts, this report adopted a twofold approach. It combined a conceptual framework (defining the educational purpose of technology) with empirical analysis (clustering the 1,000+ companies in this database).

Framework for taxonomy construction

To categorise the market, this report developed a 'three-pillars' model. This model organises EdTech by its primary function: **content**, **teaching and learning**, and **operations**.

The term 'market segments' used in the 2022 report was replaced in 2025 with a 'verticals and horizontals' framework to better reflect sector maturity. Verticals capture specialised applications, while horizontals represent enabling technologies that cut across multiple domains. This is described in greater detail in Section 3.1.1

Pillar 1: Content- from digitisation to intelligence: in 2022, 'content' was treated as a single category. The 2025 analysis distinguishes between tools that simply host resources and those that adapt and personalise them. This pillar is split into:

- **Foundational Learning:** static repositories, standard VLEs, and digital textbooks.
- **Personalised Learning:** AI-driven tools that do not just host content but actively curate individual learning journeys.

Pillar 2: Teaching and learning- deepening and widening access: this pillar focuses on tools designed to improve the learning experience. These were separated based on whether they change *how* a student learns or *who* can access the learning:

- **Immersive and experiential learning:** focuses on simulation and depth, using tools like VR to create new experiences.
- **Assistive and inclusive learning:** focuses on equity, specifically overcoming barriers for SEND students.

Pillar 3: Operations- distinguishing administration from insight: the final pillar addresses the 'back-office' of education. This covers:

- **Management and administrative efficiency:** focuses on the school as an organisation, covering HR, finance, and timetabling.
- **Assessment technologies:** separated into their own vertical because these systems provide direct feedback on student progress, rather than just handling administrative tasks.

Additionally, EdTech Hardware is treated as a distinct vertical, as it provides the physical infrastructure and environments required to host and deliver these digital solutions.

Systematic approach to market segmentation

To operationalise this framework and populate the verticals, a structured four-step methodology was applied. This rigorous process ensured that the final taxonomy was based on the actual state of the current market.

- **Step 1: Data acquisition**
  The analysis began with a database of over 1,000 companies identified as 'EdTech' by The Data City. Their Industry Engine platform was used to analyse real-time data such as website text and financial filings. This provided a more accurate view of emerging companies than traditional classification codes (SIC codes) allow.

- **Step 2: Initial clustering and gap analysis**
  A high-level analysis of the dataset was conducted against the market categories identified in the 2022 report. This helped to estimate the size of existing verticals and identify 'outlier' companies that no longer fit old definitions; specifically, those focused on AI assessment and immersive content. This analysis provided the evidence for the 'three pillars' structure described in Appendix 1.4.2.

- **Step 3: External validation**
  To ensure this model aligned with wider industry perspectives, frameworks from leaders such as HolonIQ, Forestreet, and EdTech Impact were reviewed. This confirmed that most modern taxonomies now define EdTech by its software capability and technology, rather than just who uses it (e.g., parents vs teachers).

- **Step 4: Refinement and definition**
  The final stage involved mapping the 1,000+ companies into the new verticals to test for fit and consistency.

- **Step 5: Testing against real school data**
  The taxonomy and market clustering were validated by cross-referencing the dataset against active and expired EdTech contracts from a large MAT using data provided by EdTech Impact. This process ensured that the companies identified in the supply-side mapping correspond with actual software usage within the English school system. In addition to validation, this demand-side analysis provided empirical insight into patterns of adoption across different categories of tools. While

the contract dataset reflects a defined subset of schools and providers rather than the full market, it enables comparison between supply-side growth and real-world school uptake. The analysis is therefore intended to provide analytical depth and indicative evidence of usage patterns, rather than comprehensive market coverage.

A.1.4.2 Building the EdTech database

A taxonomy serves as a 'map' of the sector, a framework used to categorise companies at a specific point in time. However, to make this map useful, it was first necessary to build a comprehensive database of currently active companies. Creating this database provided the raw data required to accurately calculate the market size of each vertical.

To ensure the list was as complete as possible, a three-phase 'data saturation' strategy was used. This involved starting with a solid data baseline and then adding multiple layers of industry-specific information to capture the full scale of the UK market.

Phase 1: Establishing the baseline

The foundation of the database was built using The Data City. This platform tracks the UK economy by combining data from Companies House with a comprehensive crawl of the entire UK web. By analysing the actual text on company websites alongside official financial filings, it provides a more accurate and up-to-date view of a sector than traditional government SIC codes. Using this 'Real-Time Industrial Classification' (RTIC) method, a core list of over 1,000 companies actively operating in the UK EdTech sector was identified.

Phase 2: Data saturation and verification

To ensure that high-growth startups or niche providers were not missed, the initial list was cross-referenced against four key types of industry intelligence:

- **Company aggregators:** Crunchbase, Forestreet, and Dealroom were used to identify investment-backed businesses and emerging technology firms that might not yet appear in standard web searches.
- **Market reports:** data from Global Data and IMARC were used to compare findings against top-down market estimates, ensuring the list aligned with known market values.
- **Industry validation:** to confirm which companies are actually trusted by UK schools, supplier lists from EdTech Impact and BESA LendEd were reviewed. This provided an additional layer of verification.
- **Event exhibitor lists:** exhibitor lists from major industry events, such as Bett UK, were analysed. These lists act as a reliable indicator of active market participation because they capture both new innovators and established companies currently marketing to the UK education sector.

Phase 3: Manual review and final classification

The fully enriched list was then manually reviewed to remove companies that did not meet the criteria, such as those focused solely on corporate training. For the remaining companies, descriptive keywords were harvested from their websites to serve as a ‘linguistic DNA’ for each vertical.

To ensure the database was exhaustive, a collaboration with The Data City was established to build a custom LLM for the project. The platform was provided with ‘training sets’ for each vertical, which included:

- **Positive examples:** a list of companies that perfectly fit a specific vertical (e.g., specific SEND tools for Assistive Learning).
- **Negative examples:** companies that might appear relevant but do not fit (e.g., generic HR tools that are not education-specific).
- **Descriptive keywords:** the unique vocabulary used by companies within that specific niche.

The Data City used this information to train their machine learning algorithm to perform a final, iterative scan of the entire UK web. This custom model could ‘read’ and understand company websites far more effectively than a simple keyword search, ensuring every validated company was accurately assigned to its correct place in the taxonomy.

Exclusion criteria
Sector focus: this report excluded technologies designed exclusively for **Higher Education (HE)**, **adult learning**, or **workforce training (‘VocTech’)**. While these are important sectors, they operate under different procurement and pedagogical models than the school system. **Target audience:** companies were excluded if they did not explicitly identify the **Education sector** as a client. To be included, a company must demonstrate a specialised offer or a dedicated service model tailored to the needs of schools, teachers, or pupils.

Given how quickly the EdTech sector is developing, as with all technology sectors, there will certainly be omissions from the final database. It is especially likely that some early-stage companies have been missed, particularly those that have yet to secure significant revenues, raise external investment, or establish an online presence. However, the steps taken ensure that the company database is as accurate and extensive as possible for the purposes of this analysis.

To accurately represent the scale of specific market verticals, companies have been assigned to multiple verticals when their product offering covers different functional areas. While individual vertical figures include these deliberate overlaps to show the full scope of each niche, the ‘Overall data’ row has been strictly de-duplicated. It represents the unique

count of companies and employees within the English EdTech sector to ensure the total market size is not artificially inflated. All financial figures and employee counts have been cleaned of anomalies and represent the most current 'gold' layer of validated industry data as of the reporting date.

Note on methodological discrepancy in reporting (2022 vs. 2025)

Gross Value Added (GVA) is the standard measure used by the Office for National Statistics (ONS) to quantify the economic value generated by an individual sector, industry, or region. While Turnover measures the total amount of money flowing through a company, GVA captures the value-added specifically by the labour and capital of that company.

GVA is a critical indicator for several reasons:

- **Productivity benchmark:** to compare the efficiency of the EdTech workforce against other high-growth tech sectors.
- **Policy and investment:** as an official measure of 'economic weight,' GVA data informs evidence-based policymaking. It is a key factor in justifying fiscal interventions, including targeted R&D tax credits, national skills grants, and the inclusion of EdTech within broader industrial strategies.
- **True economic impact:** unlike turnover, which can be inflated by high operating costs or pass-through revenue, GVA isolates the actual wealth created within the UK. It represents the value added by UK-based labour and capital, directly funding domestic wages, corporate profits, and the tax base.

The 2022 estimate of 41,000 employees and ~£4bn GVA was based on a 'theoretical maximum' model using broad digital sector benchmarks (£99,000 GVA per worker and 41,000 employees). To provide an accurate comparison, this report recalibrated the 2022 baseline using The Data City's observed platform data, which measured 31,300 employees and £3.9bn in turnover for that period.

By applying a 48% GVA-to-turnover ratio, which is the standard benchmark utilised by the ONS for the 'Information and Communication' sector, this report derives an estimated 2022 GVA of £59,872 per employee. With 31,300 measured employees, this result brings the total sector GVA to approximately £1.87 billion for the 2022 period.

The 2025 analysis employs a bottom-up company-level methodology provided by The Data City. This model produces an estimated GVA measure derived from the actual financial filings and employment data of 846 specific companies within the sector. Based on this cohort of firms, which employs 15,864 people, the sector-specific GVA is calculated at £60,494 per employee. This granular approach offers a more accurate reflection of the EdTech sector's specific productivity compared to general digital economy averages.

When comparing the recalibrated 2022 GVA per employee (£59,872) to the 2025 figure

(£60,494), the sector appears to show marginal nominal growth. However, according to the ONS, the UK Consumer Price Index (CPI) rose by approximately 18.7% between January 2022 and January 2025. When adjusting for this inflation, a 2022 GVA of £59,872 would be equivalent to approximately £71,068 in 2025 prices.

Although the currently observable 2025 workforce of 29,660 appears lower than the 2022 best estimate of 41,000, this highlights a reporting gap. Many EdTech SMEs are not legally required to disclose headcount in annual filings. To bridge this gap, this report utilised The Data City's k-nearest neighbours (k-NN) machine learning model to estimate the headcount of non-reporting firms.

The model projects a total 2025 workforce of 39,100. Compared to the measured 2022 baseline of 31,300, this represents a 24.9% increase in the EdTech workforce over three years.

A note on geographic scope: United Kingdom vs England

However, where available and relevant, England-level data is presented in parallel to support more granular analysis, for example in Table 4. This reflects several important methodological considerations.

First, the UK is the primary unit of economic measurement used by official statistical bodies. The Office for National Statistics (ONS), HM Revenue & Customs (HMRC), and the majority of sector regulators and industry associations publish data at the UK level as standard. Standalone England-level series are often unavailable, inconsistently published, or not maintained as continuous time series, which would introduce gaps and limit the reliability of any analysis.

Second, the UK functions as a single, integrated economic market. Businesses trade, invest, and operate across the four nations without internal borders or tariffs, and in most industries, including EdTech, commercial activity is not routinely reported or segmented at the England level. Company reporting, employment data, and turnover figures are therefore typically aggregated at the UK level.

Third, consistency with external benchmarks and comparators requires the use of UK-level data. International frameworks, including, the OECD, and the World Bank record the UK as a single economic unit, meaning UK-level figures are necessary to enable meaningful comparison with other countries or regions.

Fourth, the practical impact of presenting data at UK rather than England level is limited in the context of this report. The substantial majority of UK EdTech companies are headquartered or maintain a primary operational presence in England (see Table 4), meaning UK-level market figures closely reflect the scale and composition of the English EdTech market.

Finally, using a consistent geographic unit across all data sources reduces the risk of introducing error through the mixing of differently scoped datasets.

Where this report examines school adoption or engagement with EdTech, data relates to English schools only. This reflects the scope of the DfE subsidisation framework under which this research was commissioned, and the fact that DfE policy and funding frameworks apply specifically to educational institutions in England.

A.1.4.3 EdTech Impact data analysis

This section analyses usage data provided by EdTech Impact. The dataset captured real-world school usage from a group of schools within a large MAT between February 2025 and February 2026. It included information on active contracts, tool categories (verticals), usage dates, session duration, and total time spent per pupil on each tool.

In total, the analysis was based on 276,890 individual records of EdTech usage across schools. These data captured how often and in what ways different digital tools were used in practice. The scale of the dataset provided a strong behavioural evidence base, enabling patterns to be identified across a large network of schools rather than relying on small or anecdotal samples.

The analysis first explored usage across different tool verticals. This enabled identification of the most frequently used tools and facilitated comparisons across categories to determine which types of tools were most embedded across the MAT. Establishing these aggregate trends provided a system-level overview of engagement before progressing to more detailed pupil-level metrics.

To better understand engagement over time, temporal usage patterns were analysed using recorded timestamps and session durations. Examining when tools were accessed, alongside the length of each session, made it possible to distinguish between isolated usage events and sustained or recurring patterns of engagement.

At the pupil level, total time spent per tool was calculated and linked to the number of student users. To enable meaningful comparison across tools with differing adoption rates, total time spent was divided by the number of pupils using each tool. This produced an average usage-per-pupil metric, providing a normalised indicator of engagement intensity. This approach ensured that tools with larger user bases were not disproportionately represented and enabled evaluation of the depth of use at the individual learner level.

This analysis uses school-level usage data from EdTech Impact, structured using a newly developed taxonomy. While every effort has been made to ensure accuracy, any errors or omissions in the analysis are PUBLIC's, and not due to EdTech Impact’s underlying data.

Appendix 2: Evidence and gaps analysis

Table 11 below summarises key findings from the 2022 report and subsequent developments in policy, market activity, and research evidence between 2022 and 2025/26. It highlights major trends and remaining gaps in the EdTech ecosystem in England and is not intended to be exhaustive. The insights generated through this evidence and gaps analysis were used to shape and inform the design and focus of the other research workstreams undertaken as part of this study.

Table 9: EdTech market in England: 2022 baseline findings compared with 2025/26 developments

Theme	2022 Findings (Baseline)	Change Observed (2022–2025)	Remaining Gaps / Implications
Administrative & Monitoring Tools	Schools wanted multifunctional, interoperable MIS linking attendance, performance, and safeguarding; MATs requested dashboards.	DfE launched DfE Connect (April 2024), and daily attendance reporting began in academic year 2024-25. DfE proposed an Open MIS Framework to improve procurement and data migration.	Interoperability across MIS, finance and safeguarding platforms remains inconsistent. The proposed Open Framework is optional. Smaller schools face affordability and capacity barriers.
Assessment Tools	Marking and reporting tools were limited; teachers wanted stronger analytics and automated scoring.	Rapid growth of AI-enabled assessment tools. DfE funded 16 AI prototypes (2024) and allocated £1m in 2025 to prepare them for classroom use. DfE launched an EdTech Evidence Board project and an EdTech Testbed Programme.	Empirical evaluation of AI assessment tools remains limited. Concerns persist regarding assessment integrity and AI errors. Use remains concentrated in lesson preparation rather than live marking.
Products that Add Value	Schools sought EdTech supporting classroom practice, such as personalised learning and immersive tools.	Expansion of adaptive learning, immersive technologies, and AI tools. 44% of teachers report using GenAI at least occasionally for school work.	Evidence on learning impact remains mixed. Cost and teacher training barriers remain significant. Only about 16% of schools meet all DfE digital standards.

Theme	2022 Findings (Baseline)	Change Observed (2022–2025)	Remaining Gaps / Implications
Supporting SEND Students	Demand for inclusive tools tailored to SEND learners.	Assistive technology is increasingly embedded in platforms. From 2025, AT training will be included in teacher training. DfE launched a £1.7m assistive technology pilot (2025) supporting up to 4,000 schools. Pupils with EHCPs rose to about 483,000 in 2025.	Awareness of specialised AT remains low (e.g., AAC awareness among school leaders). Access inequalities persist between schools.
Safeguarding, Data Protection & Cybersecurity	Growing concerns about cyberbullying and data protection; demand for clearer guidance.	DfE updated cybersecurity standards (2024–2025) and embedded them in digital technology standards to be mandatory by 2030. Keeping Children Safe in Education (KCSIE) 2025 explicitly references AI risks. Around 60% of secondary schools and 44% of primaries reported a cyber incident.	Implementation remains uneven as many schools do not yet meet the digital standards. Schools require more support in managing AI vendor contracts and data protection compliance.
Infrastructure & Capacity	Budget constraints, connectivity issues and device shortages were common barriers.	DfE's Connect the Classroom improved connectivity for over 1.3 million pupils across about 3,700 schools. An additional £45m was announced in March 2025 and a further £300m in February 2026 through the Education Estates Strategy. Consultation on mandatory digital standards by 2030.	Only around 63% of schools had fully functional Wi-Fi. Only 16% meet all digital standards. Replacement cycles and the digital divide outside school remain major challenges.

Appendix 3: List of reviewed literature

The table below summarises the main literature reviewed as part of this research. These findings provided the key evidence base for the study and helped identify important gaps in current knowledge. This evidence and gap analysis then informed the direction and development of the remaining workstreams.

Table 10: Literature reviewed during research

Year	Author / Organisation	Title	Description
2026	Department for Education	Education Secretary Speech at Bett UK Conference	The UK Education Secretary's Bett 2026 keynote outlined government priorities for AI in education, including AI safety, closing the disadvantage gap, and SEND support through assistive technology. Also includes announcement of £23m budget to expand the EdTech Testbed Programme.
2026	Department for Education	Education Estates Strategy: A Decade of National Renewal	Government strategy setting out a 10-year plan to improve school and college buildings in England, focusing on proactive estate management, rebuilding and renewal programmes, and investment in sustainable, resilient and digitally enabled education facilities.
2026	JISC Services Limited / UK Government	Request for Information: Digital Assessment Tools Framework	Market engagement notice seeking supplier input ahead of a national procurement framework for digital assessment tools. Covers platforms, academic integrity tools, secure delivery, online proctoring, ePortfolios, and integrations. Planned framework duration: Nov 2026-Oct 2029.

Year	Author / Organisation	Title	Description
2026	Tony Blair Institute for Global Change	Generation Ready: Scaling Safe, High-Quality AI in England's Schools	Policy report arguing AI adoption in schools is fragmented and risks widening inequalities without a national strategy. Recommends scaling safe AI tools to reduce teacher workload, personalise learning and improve data insights, alongside national standards, procurement guidance and teacher training.
2026	CIVICA-European University Alliance	Automation in Education: The Use of EdTech in England	Research blog examining how EdTech providers are embedded in English education systems. Highlights governance issues, including data privacy, biometric monitoring, algorithmic decision-making, and dependence on private technology vendors, calling for stronger regulatory oversight.
2025	IFF Research / Department for Education	Technology in Schools Survey Report: 2024–2025	Large-scale DfE survey examining technology adoption across English schools, covering infrastructure, strategic planning, staff capability, GenAI use and barriers to implementation. Provides baseline data on how schools are approaching digital strategy and governance.
2025	Department for Education	Evaluation Strategy 2025–2029	DfE strategy outlining how the department will strengthen monitoring and evaluation across its policies and programmes. Sets out priorities for building a stronger evidence base, embedding evaluation in policy design, and improving transparency and accountability in assessing education policy outcomes.
2025	Department for Education	DfE Financial Returns Guidance for Schools	Official guidance explaining how schools report financial data, including technology and digital infrastructure spending. Useful for understanding how EdTech expenditure is categorised and monitored within school budgets.

Year	Author / Organisation	Title	Description
2025	Department for Education	Management Information Systems for Schools in England (Preliminary Market Engagement Notice)	Procurement notice outlining the DfE plans to engage the market ahead of a national framework for school management information systems (MIS), aimed at improving interoperability, data use and procurement routes for schools in England
2025	Isabel Kempner / Education Endowment Foundation	Harnessing the Potential of EdTech: A New Review	EEF summary of a systematic review finding EdTech can have a positive average impact on learning outcomes, but often produces weaker results for disadvantaged pupils, raising concerns about widening attainment gaps.
2025	Education Endowment Foundation	EEF Research Agenda: EdTech	Overview of EEF's strategy to build stronger evidence on EdTech effectiveness through funded trials of digital interventions, including tutoring platforms, literacy tools and GenAI applications for teaching.
2025	Department for Education	Get Help Buying for Schools	Government procurement support service helping schools and multi-academy trusts purchase goods and services, including EdTech, through approved frameworks and compliant procurement processes.
2025	Department for Education	Introducing DfE Connect: Bringing Key Information for Schools into One Place	A blog post introducing DfE Connect, a digital service designed to centralise DfE guidance, data, and resources for school leaders and business professionals. Launched in April 2024 for academies and trusts, the platform aims to simplify access to DfE services and information, supporting administrative efficiency and decision-making.

Year	Author / Organisation	Title	Description
2025	Cabinet Office	Procurement Policy Note (PPN 023): 2026 Threshold Amounts	Policy note establishing procurement thresholds under the Procurement Act 2023. Relevant to EdTech purchasing decisions by schools and MATs, defining when formal tender procedures are required.
2025	Cabinet Office	Assessing and Comparing Competitive Tenders	Guidance explaining how public sector organisations evaluate bids in competitive procurement procedures, including award criteria and assessment methods relevant to EdTech procurement.
2025	Ofsted / Department for Education	'The Biggest Risk Is Doing Nothing': Insights from Early Adopters of AI in Schools and FE Colleges	Qualitative study of 21 early-adopter institutions exploring how AI is being used in practice. Finds adoption often driven by internal AI champions and focused on teacher workload reduction, but with limited evidence of improved long-term learning outcomes.
2025	DSIT, DHSC, DfE, DWP	Digital Inclusion Action Plan: First Steps	Cross-government strategy addressing digital exclusion in the UK. Identifies key barriers, including lack of skills, devices and connectivity and outlines early actions such as an innovation fund and device donation schemes.
2025	Ada Lovelace Institute / Nuffield Foundation	A Learning Curve? AI in UK Education	Landscape review examining AI use in education. Finds most use currently informal (e.g. ChatGPT) and notes a lack of evidence, governance frameworks and procurement guidance for evaluating AI-based learning tools.
2025	Department for Education	Thousands of Children with SEND to Benefit from Assistive Tech	Government press release announcing a large-scale pilot establishing assistive technology lending libraries across local authorities, allowing schools to trial devices supporting SEND pupils before purchasing.

Year	Author / Organisation	Title	Description
2025	National College	Teachers to Receive Training on Assistive Technology	News article reporting the UK government's plan for mandatory training for new teachers on using assistive technology to support pupils with SEND, aimed at improving accessibility, participation and learning outcomes.
2025	UK Safer Internet Centre	Appropriate Filtering and Monitoring Definitions	Updated definitions guiding how schools should implement online filtering and monitoring systems. Includes new requirements relating to AI-generated harmful content and misinformation.
2025	Education Policy Institute / Sync	EdTech Decision-Making and Inclusive Practice: Insights from Multi-Academy Trusts	Roundtable report exploring how MATs evaluate and purchase EdTech. Finds no single national framework for assessing EdTech quality and highlights growing interest in assistive technologies for inclusion.
2025	Department for Education	Generative Artificial Intelligence (AI) in Education	DfE policy guidance explaining opportunities and risks of GenAI in schools, including issues of bias, hallucinations, data protection and safeguarding. Sets expectations for safe adoption.
2025	Department for Education	AI teacher tools set to break down barriers to opportunity	News article reporting a UK government initiative providing £1 million to 16 developers to build AI tools that support teachers with marking and personalised pupil feedback, aiming to reduce workload and increase time for classroom teaching.
2025	Department for Education	Keeping Children Safe in Education 2025	Statutory safeguarding guidance for schools and colleges in England outlining legal duties to protect children, including requirements relating to child protection policies, staff training, online safety and safeguarding procedures.

Year	Author / Organisation	Title	Description
2025	Department for Science, Innovation and Technology / Home Office	Cyber Security Breaches Survey 2025: Education Institutions Findings	Research examining cyber security practices and incidents in UK education institutions, finding that cyber breaches and attacks are common across the sector, with higher education institutions, colleges and schools frequently reporting incidents and increasing efforts to identify cyber risks.
2025	Department for Education / Department for Science, Innovation and Technology	No Child Left Behind in Plans to Narrow the Digital Divide in Education	Government press release announcing a £45 million investment to improve digital connectivity in schools and launching a consultation on requiring all schools to meet core digital and technology standards by 2030 to reduce inequalities in access to technology.
2025	Department for Education	Narrowing the Digital Divide in Schools and Colleges: Consultation Response	Government consultation response summarising sector feedback on proposals to ensure all schools meet six core digital and technology standards by 2030, highlighting infrastructure gaps, funding pressures and the need for stronger digital leadership and technical support.
2025	Ayça Atabey, Kim Sylwander & Sonia Livingstone / LSE Digital Futures for Children & 5Rights Foundation	A Child Rights Audit of GenAI in EdTech	Study analysing GenAI education tools using a child-rights framework. Finds risks related to data protection, transparency and misleading outputs and calls for stronger regulation and child-rights impact assessments.
2025	EdTech UK	Our Digital Promise	Sector commentary advocating a national strategy for EdTech adoption, highlighting potential learning gains and the importance of teacher training and leadership in digital transformation.

Year	Author / Organisation	Title	Description
2025	Chartered College of Teaching	EdTech Evidence Board Project: Insights from Phase One	Blog summarising early findings from the EdTech Evidence Board project, highlighting that educators value evidence on EdTech effectiveness but often find it difficult to access, and outlining efforts to create a framework linking research evidence with EdTech product evaluation.
2025	UK Parliament-House of Lords Library	Educational Technology, Digital Innovation and AI in Schools	Parliamentary briefing summarising research and policy developments related to EdTech and AI in UK schools, including benefits, risks, and emerging government initiatives.
2025	Department for Education	Special Educational Needs in England: Academic Year 2024/25	Official statistics release presenting national data on pupils with special educational needs (SEN) in England, including prevalence, types of need and provision such as SEN support and Education, Health and Care (EHC) plans.
2025	Chartered College of Teaching	EdTech Evidence Board Project	Initiative reviewing evidence submitted by EdTech suppliers to establish trusted standards of effectiveness.
2024	Velislava Hillman et al. / LSE & Policy Connect	AIED and EdTech Procurement: Challenges for Policy and Governance	Working paper examining procurement challenges in AI-based education technologies. Finds opaque decision-making and inadequate oversight of data privacy and accessibility standards.
2024	Digital Poverty Alliance	Tech4Teachers White Paper	Evaluation of a programme providing laptops and training to teachers in disadvantaged schools. Finds many teachers lack adequate devices and EdTech training despite recognising its benefits.

Year	Author / Organisation	Title	Description
2024	PUBLIC	Procurement Reform: A Path to UK Economic Growth	A brief exploring how UK procurement reforms could increase opportunities for smaller digital technology suppliers, including EdTech companies.
2024	Department for Education	Working Lives of Teachers and Leaders: Wave 2	Large-scale DfE survey examining the experiences of teachers and school leaders in state schools in England. Conducted in early 2023 by IFF Research, the study explores workload, wellbeing, flexible working, pay, professional development, pupil behaviour and career intentions, providing longitudinal evidence on workforce pressures and retention in the education system.
2024	Dealroom.co / HSBC Innovation Banking	UK Innovation Update: Q2 2024	Quarterly analytical report examining the performance of the UK technology and startup ecosystem. Using venture capital and startup data, the report analyses investment trends, leading sectors, and geographic distribution of innovation, highlighting the continued prominence of AI and emerging technology sectors within the UK innovation economy.
2024	Education Policy Institute	What Do We Know About Teachers' Use of EdTech?	Analysis combining survey data and research findings to examine teachers' adoption of technology. Shows widespread device use but lower levels of digital pedagogy integration.
2024	BESA	ICT in Schools Research 2024	Long-running survey tracking ICT provision, infrastructure and EdTech spending in English schools.
2024	WhichMIS?	MIS Providers and System Interoperability	Industry article examining interoperability between school management information systems and third-party EdTech products through APIs and integrations.

Year	Author / Organisation	Title	Description
2024	Tech Research Online	How Gamification in Education is Transforming EdTech in 2024	Overview article describing how gamification techniques such as points, badges and adaptive challenges are used in digital learning platforms.
2024	Oak National Academy	Oak Aila AI Lesson Assistant	Product page describing Oak's AI-powered lesson planning assistant designed to generate curriculum-aligned teaching resources.
2024	Good Things Foundation	Minimum Digital Living Standard Research	Research defines the digital access and skills households need to participate fully in modern society.
2023	Department for Education	Technology in Schools Survey Report: 2022–2023	National survey examining technology use, effectiveness and barriers to implementation in English schools.
2023	Naace / BESA	EdTech Leadership Briefing Paper	Strategic briefing identifying key challenges facing school technology leaders, including infrastructure reliability, training and funding constraints.
2023	Rose Luckin / EDUCATE Ventures Research & BESA	The State of Evidence in EdTech 2023	Industry report highlighting the limited evidence base for many EdTech products and calling for stronger impact evaluation.
2023	Education Policy Institute & Nesta	Education: The Fundamentals	Major policy report analysing key structural challenges in the English education system, including workforce pressures and SEND demand.
2023	Department for Education	EdTech Quality Frameworks and Standards: A Review	Review of 74 EdTech evaluation frameworks identifying common quality criteria and recommending a broader evidence approach beyond narrow experimental designs.

Year	Author / Organisation	Title	Description
2023	Department for Education	Sustainability and Climate Change: A Strategy for the Education and Children's Services Systems	UK government strategy outlining how England's education and children's services sectors will support climate action and sustainability. It sets four aims: climate education, green skills, sustainable estates, and resilient infrastructure, and includes actions such as school climate action plans and sustainability leads by 2025.
2022	Frontier Economics / Department for Education	The Education Technology Market in England	Market analysis estimates that over 1,000 EdTech companies operate in England, most of them SMEs, contributing around £3.7-4bn to the economy.
2022	Department for Education	Future Opportunities for Education Technology in England	Research report examining global trends and future development opportunities for EdTech in England.
2022	Department for Education	Implementation of Education Technology in Schools and Colleges	Study examining how schools successfully implement EdTech, identifying preparation, training and monitoring as key stages.
2022 (last updated 2025)	Department for Education	Share Your Daily School Attendance Data	Government guidance outlining how schools in England must submit daily pupil attendance data through management information systems to support national monitoring of absence and early intervention
N/A	Bett	Bett Show	Annual UK EdTech conference bringing together policymakers, educators and suppliers.
N/A	LGfL-National Grid for Learning	EdTech Hubs	Programme supporting schools with guidance on selecting and implementing education technology safely.
N/A	EdTech Impact	EdTech Impact Platform	Independent platform enabling educators to review and evaluate EdTech products.

Year	Author / Organisation	Title	Description
N/A	LSE Digital Futures for Children	EdTech findings from the DFC	Research exploring how children's data is processed within EdTech platforms and the implications for privacy and regulation.
N/A	Department for Business and Trade	Invest in the UK: EdTech	Government investment promotion page describing the UK's EdTech sector and innovation ecosystem.

Appendix 4: List of keywords used to identify literature

The following tables detail the final search syntax used to identify the literature for this review.

The search strings were constructed by combining four core concept blocks using the AND operator. Within each block, synonyms were combined using OR.

Table 11: Examples of search terms and keywords used in the literature review

Concept block	Key terms and synonyms
Technology	"educational technology", EdTech, "digital learning", "assistive technology", "adaptive learning", "artificial intelligence", AI, "generative AI", "learning management system", LMS, platform*
Context	England, "United Kingdom", UK, schools, "primary education", "secondary education", "K-12", academy, "multi-academy trust", MAT
Policy and market	policy, strategy, procurement, market, adoption, implementation, "digital maturity", infrastructure, spending, investment
Outcomes	"teacher workload", "pupil attainment", efficiency, equity, "digital divide", standards, evidence, impact

To ensure the relevance of the evidence base to the current 2025 context, the following criteria were applied during the screening process.

Table 12: Inclusion and exclusion criteria applied during evidence screening

Criterion	Inclusion	Exclusion
Date	Published between Jan 2022 and present (post-pandemic trends and the rise of GenAI)	Published before 2022
Geography	Focus on England or UK-wide policy applicable to England	Studies focused solely on Scotland, Wales, Northern Ireland, or non-UK systems (unless comparative)
Sector	Primary and Secondary schools (K-12), Special Schools, and MATs	Higher Education (Universities), Early Years (Pre-school), or Adult Skills (unless relevant to teacher training)
Language	English	Non-English languages

Appendix 5: Market sizing estimation

1. Data sourcing and infrastructure

The Data City platform aggregates data from several primary and secondary sources:

- Companies House: provides the base layer of data for all registered UK companies, including incorporation dates, registered addresses, and director information.
- Web scraping: The Data City performs a continuous crawl of the UK web, scraping text from company websites to understand their actual activities, products, and services.
- Financial and credit data: detailed financial filings and company health data are integrated via Creditsafe.
- Investment and grants: information on equity funding and venture capital is provided by Dealroom, while data on public R&D grants is pulled from Innovate UK and 360Giving.

2. Methodology for key metrics

Because many Small and Medium-Sized Enterprises (SMEs) are not legally required to disclose full financial or employee data, The Data City uses a combination of reported data and machine learning estimates to provide a complete market view.

- Employee count:
    - Reported Data: where companies report headcount in their annual filings, these figures are used directly.
    - Estimated Data: for companies that do not disclose headcount, The Data City uses a k-nearest neighbours (k-NN) model. This model estimates the number of employees by comparing a company to similar firms (based on size, age, and financial markers) that do report their headcount.
- Turnover:
    - Turnover is sourced from official financial statements filed with Companies House.
    - For companies where turnover is not disclosed, it is estimated using predictive modelling. This model considers factors such as the company's industry, its age, and its latest reported balance sheet figures.
- Growth rate:

- Employee growth: calculated by comparing the estimated or reported headcount of a company over a specific period (typically the last three to five years).
- Turnover growth: measured by the change in a company's annual revenue over time.
- Compound Annual Growth Rate (CAGR): the platform calculates the mean annual growth rate over a specified period to smooth out year-on-year fluctuations and provide a clearer picture of the long-term trajectory.

3. Data refresh and quality control

The Data City platform updates its data monthly. This ensures that the findings in this report reflect the most recent filings at Companies House and the most current information available on company websites. Companies that have dissolved or entered liquidation are automatically flagged and removed from the active sector analysis.

Market maturity and business age

This section profiles the maturity of the market by analysing the age distribution and incorporation dates of active companies.

The sector exhibits a dynamic market structure characterised by a high volume of recent entrants balanced by a stable core of established firms. Analysis of the dataset shows that approximately 54% of all active companies were incorporated within the last decade (2014–2024). A significant surge in entrepreneurship is visible between 2020 and 2022, a period which alone accounts for nearly 22% of the total company population. While the market is dominated by these younger, primarily Micro-sized businesses, a veteran vertical provides the industry's foundational stability, with 28% of firms having been active for over 15 years and 11% established for 25 years or more. This older cohort, while smaller in number, represents the most mature vertical of the market, containing the majority of large companies that drive 65% of total sector employment.

Diversity and demographics

This section examines the leadership profile of the UK EdTech sector, focusing on gender diversity among founders and directors to understand representation within the industry's leadership.

Leadership profile and gender diversity

Based on an analysis of the active companies in the EdTech database, the sector shows a significant gender gap in leadership, with a notable underrepresentation of women in founding and senior executive roles.

- **Women-founded companies:** Only 13.4% of EdTech companies in the dataset were founded or co-founded by women. This suggests that the vast majority of firms in the sector were established by all-male founding teams.
- **Women-led companies:** The representation is slightly lower for active leadership, with 10.5% of companies currently classified as women-led (where a woman holds a CEO or equivalent primary leadership position).
- **Board-level representation:** Among all registered directors within the sector, women account for approximately 19.8% of total director roles. While this is higher than the percentage of women founders, it indicates that roughly four out of every five board-level positions in UK EdTech are held by men.

The demographic profile of the sector's leadership is a critical factor in how technology is developed and deployed. The current lack of diversity in founding teams may impact the pedagogical lens through which tools are designed, particularly for products aimed at diverse pupil populations. As the sector matures, increasing the representation of women in both founding and board-level roles is identified as a key area for improving the inclusive growth of the UK EdTech market.

Appendix 6: EdTech Market Metrics: 2022 vs 2025

Table 15 below compares key estimates from the 2022 report with updated findings for 2025, providing an indication of how the sector's scale, workforce, and economic contribution have evolved over the past three years.

To improve comparability, this report recalibrates aspects of the 2022 baseline using updated calculation approaches. The original 2022 estimate of 41,000 employees and approximately £4bn GVA was based on a 'theoretical maximum' model using broad digital sector benchmarks (£99,000 GVA per worker). These assumptions were necessary due to the limited availability of company-level employment data.

As outlined in Appendix 1.1.4.1, the recalibrated 2022 baseline instead draws on The Data City platform data, identifying 31,300 employees and £3.9bn in turnover. This aligns with the methodology used in the 2025 analysis, enabling a more consistent comparison.

It is important to note that different methodological approaches and taxonomy definitions were used in the 2022 report and the current analysis. As a result, direct comparisons or assessments of growth should be interpreted with caution.

Table 13: Comparison of key EdTech market metrics reported in 2022 and updated with the 2025 data

Market metric	2022 report findings (England)	2022 revised findings (England)	2025 updated data (UK)
Active companies	1,000+	1,000+	1,123
Total UK employees	41,000 (best estimate)	31,300	29,660 – 39,100*
GVA	£3.7bn – £4.0bn	£1.87bn	£1.8bn – £2.4bn*

Source: 2022 report and PUBLIC analysis of The Data City, February 2026

Note: 2022 figures relate to England only. 2025 figures are presented at UK level. See Appendix 1.4 for methodological rationale on geographic scope.

Appendix 7: Overview of EdTech implementation journey and barriers

Table 14: Breakdown of key stages and barriers of the EdTech implementation journey

Stage	Purpose	Barriers
Stage 1: Identifying Needs	To clearly define the challenges that technology could help address	Limited strategic planning; digital and AI literacy gaps; digital divide and unequal home access.
Stage 2: Researching and Assessing	To explore which types of tools could realistically meet identified needs.	Reliance on word-of-mouth; limited independent evidence on impact; rapid technology change outpacing evidence.
Stage 3: Making an Informed Decision	To decide which option(s), if any, are worth piloting or adopting.	Competing priorities; budget and resource pressures; decisions sometimes accelerated due to accountability pressures.
Stage 4: Piloting and Trialling	To test selected tools in real settings before wider use	Limited staff time and capacity; insufficient training for pilot users; limited supplier technical support during pilots.
Stage 5: Procuring and Accessing	To secure compliant, sustainable access to the selected tool.	Complex and fragmented procurement processes; data privacy and security assessment challenges; cost
Stage 6: Deploying and Integrating	To introduce the tool into everyday practice in a reliable and manageable way.	Infrastructure limitations (hardware, bandwidth, legacy systems); staff digital confidence and skills gaps
Stage 7: Adopting and Training	To embed consistent, confident, and purposeful use across the school.	Poor curriculum alignment, limited leadership engagement or digital culture, low staff confidence, lack of time
Stage 8: Measuring and Evaluating	To assess impact over time and inform future decisions.	Lack of evaluation frameworks; limited usage and impact data from suppliers; lack of consistent policy or evidence standards.

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