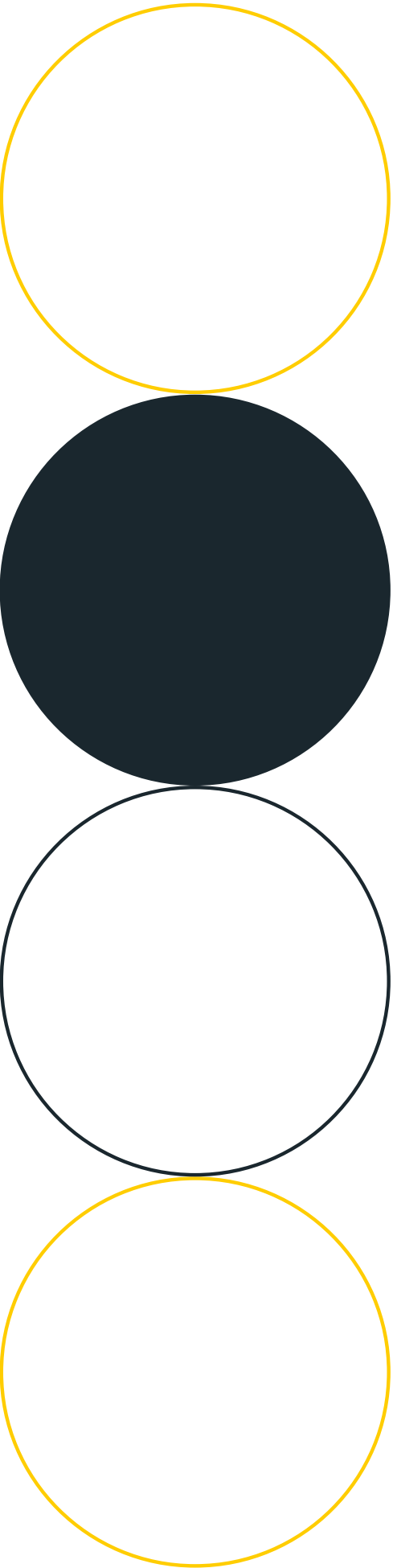
EdTech Ecosystem Hubs

Catalysing Innovation Across Education Systems



Contents

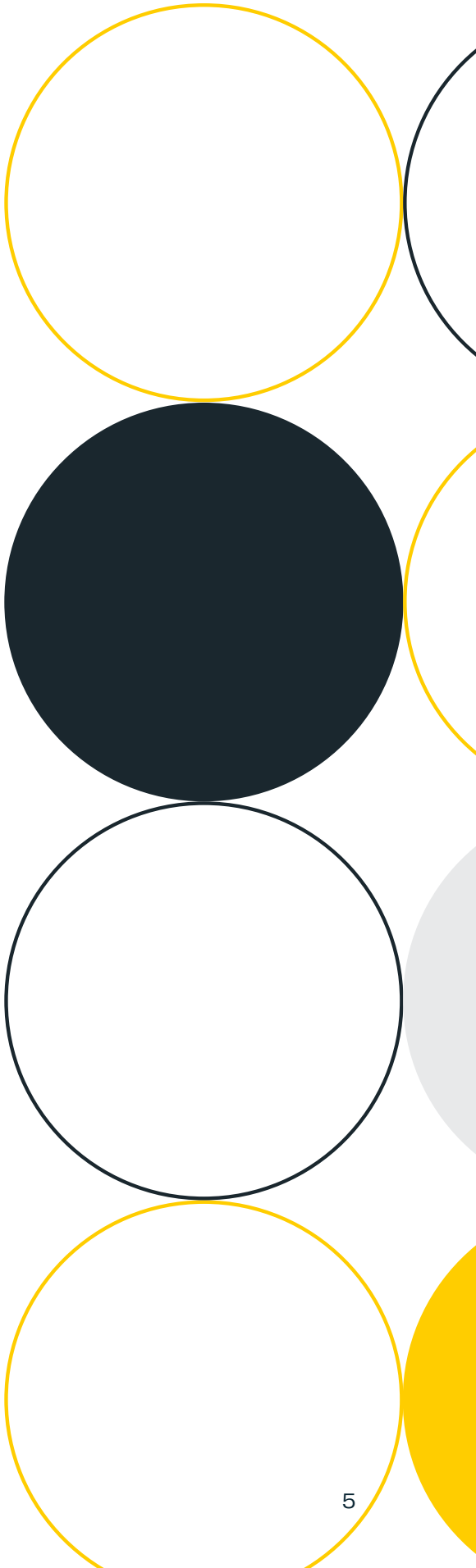
Section 1

Engaging & Convening EdTech Ecosystem Hubs

EdTech Ecosystem Hubs (ETE Hubs) have become an established layer of infrastructure within education innovation systems. Over the past decade, ETE Hubs have played a connective role across key stakeholders – startup founders, universities, schools, employers, funders, and governments – helping translate emerging technologies, tools and solutions into applied pilots, partnerships, and pathways toward adoption. While their structures and mandates vary across regions, their function is consistent: aligning innovation with the realities and needs of education systems, including teachers and learners.

As the global EdTech market has expanded across early learning, K–12, post-secondary, and workforce training and development, so too has ecosystem complexity. ETE Hubs face mounting pressure to contribute to system-level outcomes while often operating without corresponding system-level funding, authority, or long-term institutional support. Across the world, ETE Hub leaders emphasized that the constraint is less about the availability of innovation and more about coordination, sustainability, and alignment across complex education ecosystems.

This report draws on direct engagement with EdTech Ecosystem Hub leaders across geographies and operating models to examine how ETE Hubs function, how they adapt to local conditions, and where structural constraints continue to shape their impact. By synthesizing shared patterns across diverse contexts, the report provides a global perspective on ecosystem-level challenges, operational trade-offs, and conditions associated with sustainable and effective ETE Hub activity.



About This Research

This project explores the critical success factors that enable EdTech Ecosystem Hubs to catalyze innovation and impact within specific education ecosystems. While EdTech products have grown rapidly in number and scope, comparatively less attention has been given to the conditions that allow the support structures behind them, such as accelerators, incubators, university-affiliated innovation initiatives, and venture networks, to operate effectively and sustainably.

At its core, the research asks: What does it take for an EdTech Ecosystem Hub, within a given geographic, economic, and policy environment, to support meaningful outcomes for education systems and their learners?

To address this question, the project examined:

- The types of EdTech Ecosystem Hubs emerging across different regions, how they are structured, and how their roles are evolving.
- Business and funding models that shape long-term sustainability.
- Systemic barriers and shared constraints across ecosystems.
- Structural and relational success factors that enable Hubs to support innovation and outcomes.
- The contextual drivers that underpin high-performing ETE Hubs.

By identifying these patterns, the research aims to inform stakeholders, including higher education institutions, investors, and governments, on how and where to engage with EdTech Ecosystem Hubs to strengthen innovation capacity and long-term ecosystem resilience.

HolonIQ by QS brings a unique global market perspective to this work. Drawing on its robust sector intelligence and datasets alongside its engagement across education ecosystems, the project connects on-the-ground ETE Hub insight with broader market context. This positioning enables comparative analysis across geographies and models, grounding participant perspectives within global education and workforce trends.

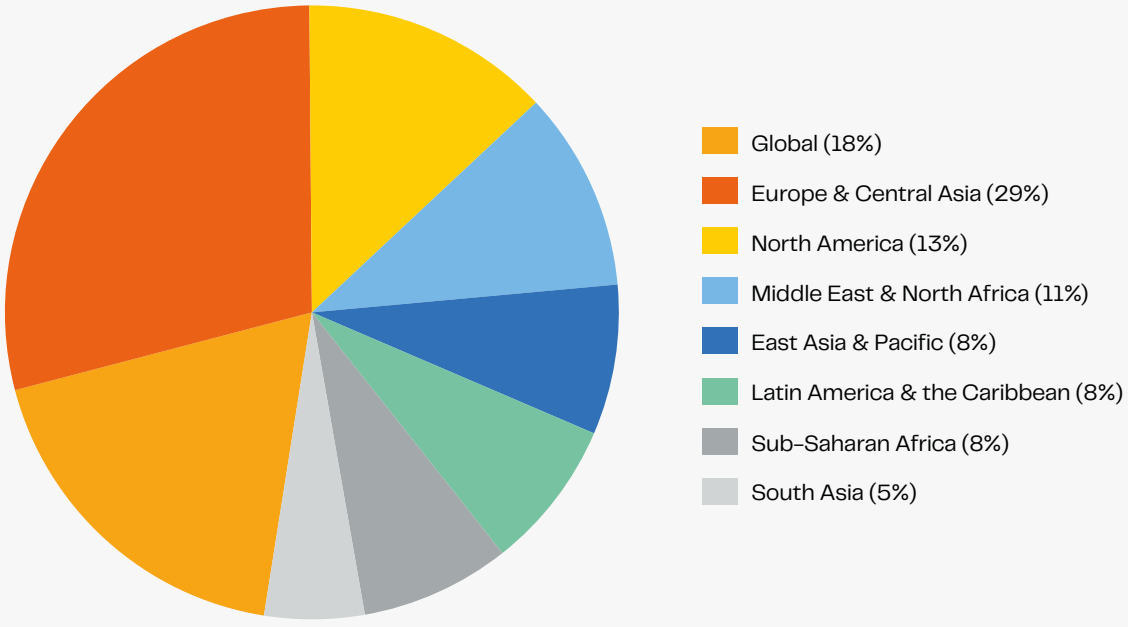
Research Scope and Participants

From August to December 2025, HolonIQ by QS engaged EdTech Ecosystem Hub leaders through surveys, structured interviews, regional roundtables, and an in-person convening at the Reimagine Education Conference in London.

A total of 27 EdTech Ecosystem Hubs participated in the survey component of this research, representing seven regions: Sub-Saharan Africa, North America, Latin America, Europe and Central Asia, Asia-Pacific, South Asia, and globally oriented networks. Several Hubs operate across multiple geographies; however, only one participant identified as operating at a truly global level.

Participating ETE Hubs reflect a range of operating models, including accelerator and incubator programs, university-affiliated innovation Hubs, government-supported initiatives, and membership-based or network platforms.

Figure 1. EdTech Ecosystem Hub Leaders represent 7 distinct regions, with Europe and Central Asia leading with 30% of participants.



Source: HolonIQ by QS

Section 2

EdTech Ecosystem Hub Archetypes

EdTech Ecosystem Hubs operate under diverse structural configurations shaped by funding conditions, institutional anchoring, and ecosystem maturity. While ETE Hubs are often described by activities the do, (accelerators, incubators, associations, research) these labels can obscure deeper and more complex structural differences that influence sustainability, governance, and system-level impact.

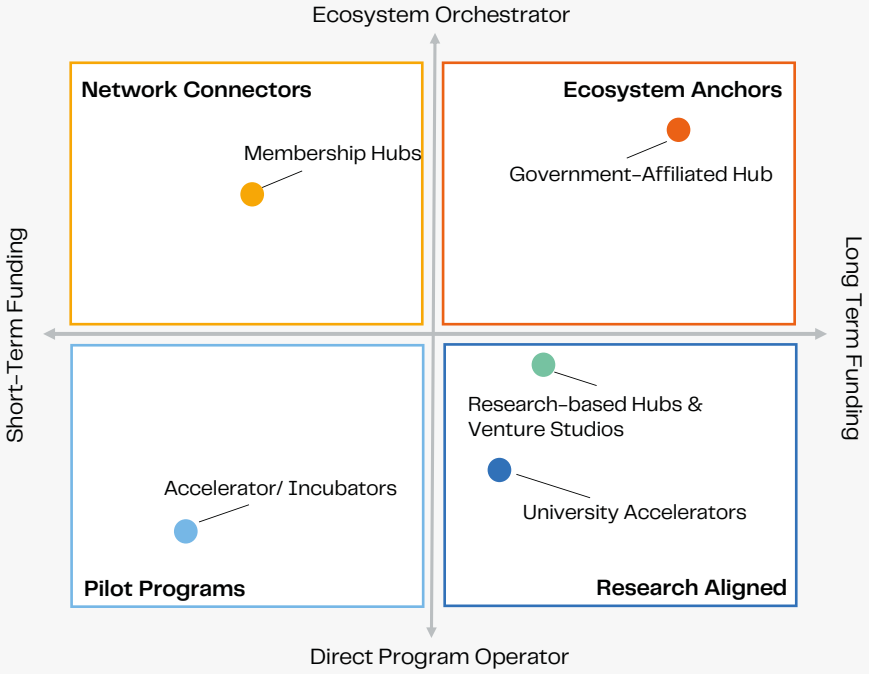
Two dimensions consistently shaped how Hubs function:

Funding Model
ranging from short-term, project-based funding to recurring or institutionalized support.

Operating Orientation
ranging from program-led delivery such as cohorts or pilots to ecosystem-level coordination like infrastructure-building and policy alignment.

Together, these dimensions reveal four dominant ETE Hub Archetypes. These should be understood as operating logics rather than rigid categories; most ETE Hubs blend characteristics and shift over time as funding environments and stakeholder relationships evolve. Figure 2 situates the four archetypes across funding stability and operating structure.

Figure 2. EdTech Ecosystem Hub archetypes by funding type and operational structure.



Source: HolonIQ by QS

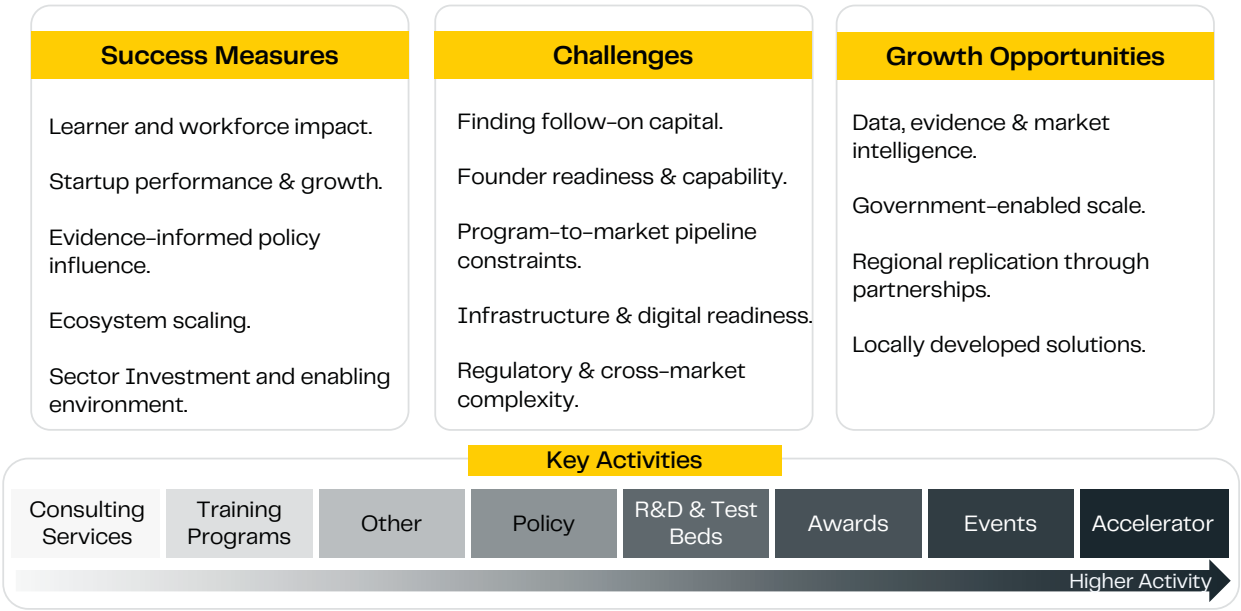
Archetype 1:

Pilot Programs

Pilot Program ETE Hubs are typically accelerator- or incubator-led and center on structured, time-bound cohorts supporting early-stage EdTech startup founders. Their activities emphasize mentorship, piloting, product development support, and access to investors and partners. Their primary ecosystem contribution lies in founder development, experimentation, and early-stage pipeline creation.

These models appear to be effective in enabling rapid learning cycles and testing innovation. However, sustainability remains a recurring challenge, as operations often depend on grants, philanthropic funding, or program-specific sponsorships. While many layer in broader ecosystem activities, their structural centre of gravity remains cohort-based delivery.

Figure 3. Success Measures, Challenges, Opportunities & Key Activities for Pilot Program ETE Hubs.

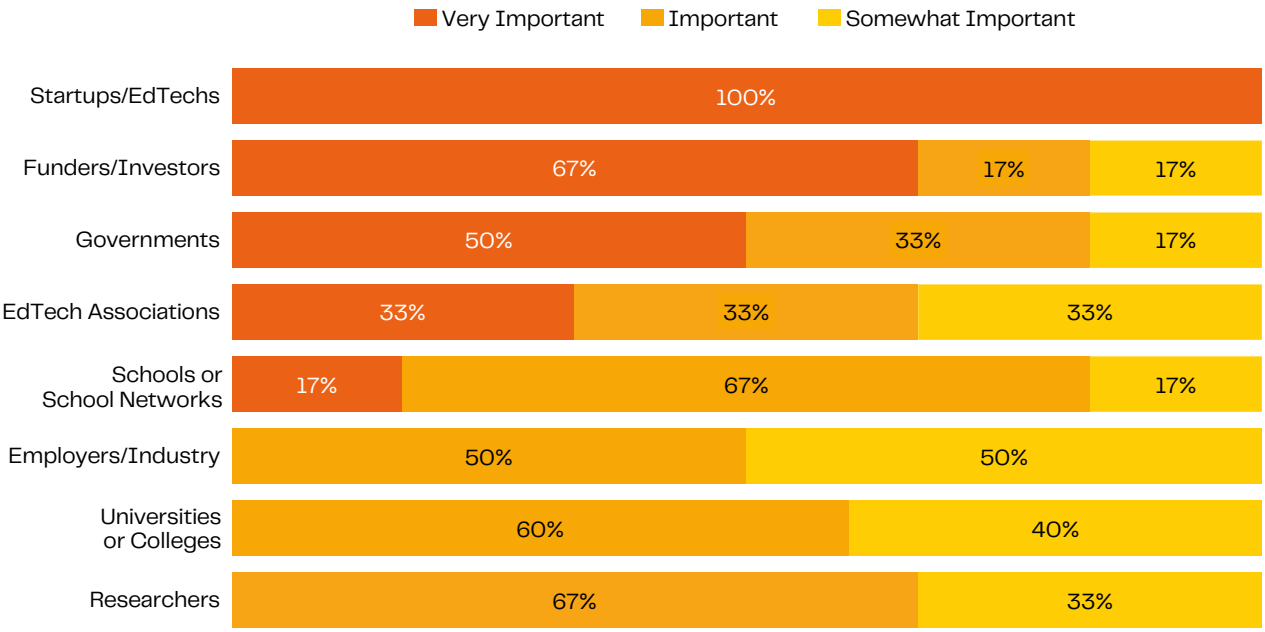


Source: HolonIQ by QS

Pilot Program Hubs overwhelmingly identify startups and EdTech companies as their most important stakeholders, with 100% rating them as “very important” as seen in Figure 4. Funders and investors also rank highly, reflecting the central role of capital access in early-stage founder support.

Governments and schools are important partners, particularly for piloting and validation, but the focus remains on building and accelerating startup pipelines. This reinforces the cohort-based, founder-centric logic that defines this archetype.

Figure 4. Stakeholder importance – Pilot Program ETE Hub Archetype.



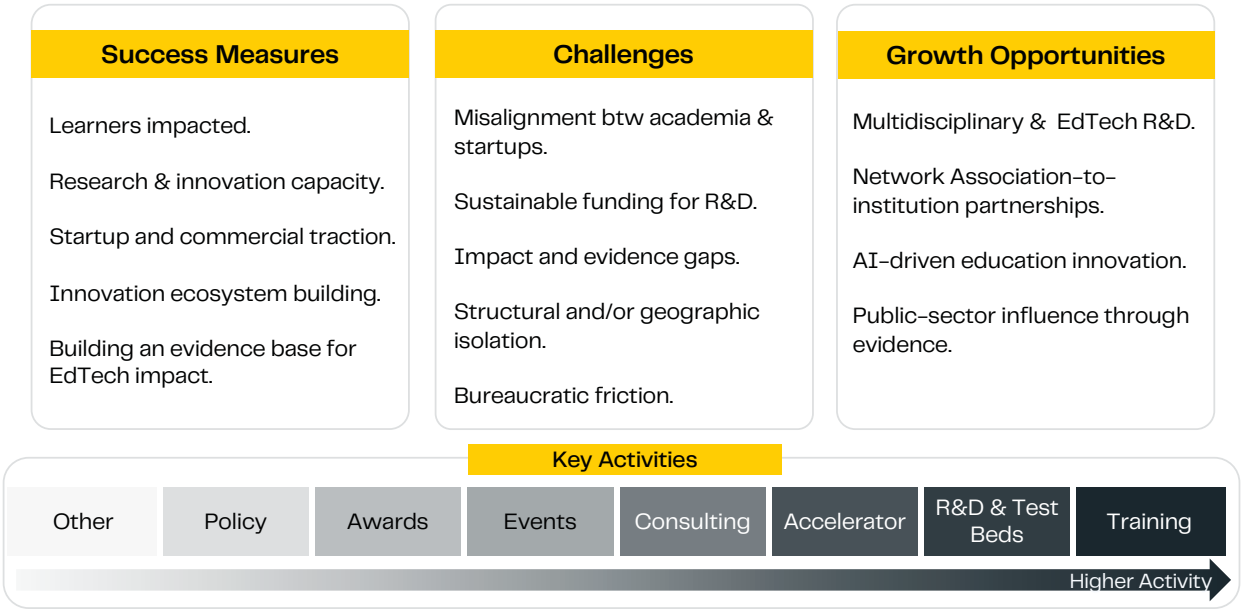
Source: HolonIQ by QS

Archetype 2:

Research Aligned

Research-Aligned ETE Hubs are typically embedded within universities or education institutions and often combine accelerator or incubator programming with applied research and institutional partnerships. Many run structured cohorts similar to Pilot Program models. However, their distinguishing feature is structural anchoring within a university or other research-based environment. This positioning often provides access to researchers, students, piloting environments, and institutional infrastructure that shape how innovation is developed and tested. This model emphasizes a proximity to research and education systems, enabling pathways from evidence generation to commercialization and real-world implementation. While these Hubs may support early-stage founders, their reach extends beyond cohort delivery to include any combination of research translation, workforce development, and long-term institutional collaboration. Governance, and funding structures and university mandates can influence pace and flexibility, but they also contribute to durability and ecosystem legitimacy.

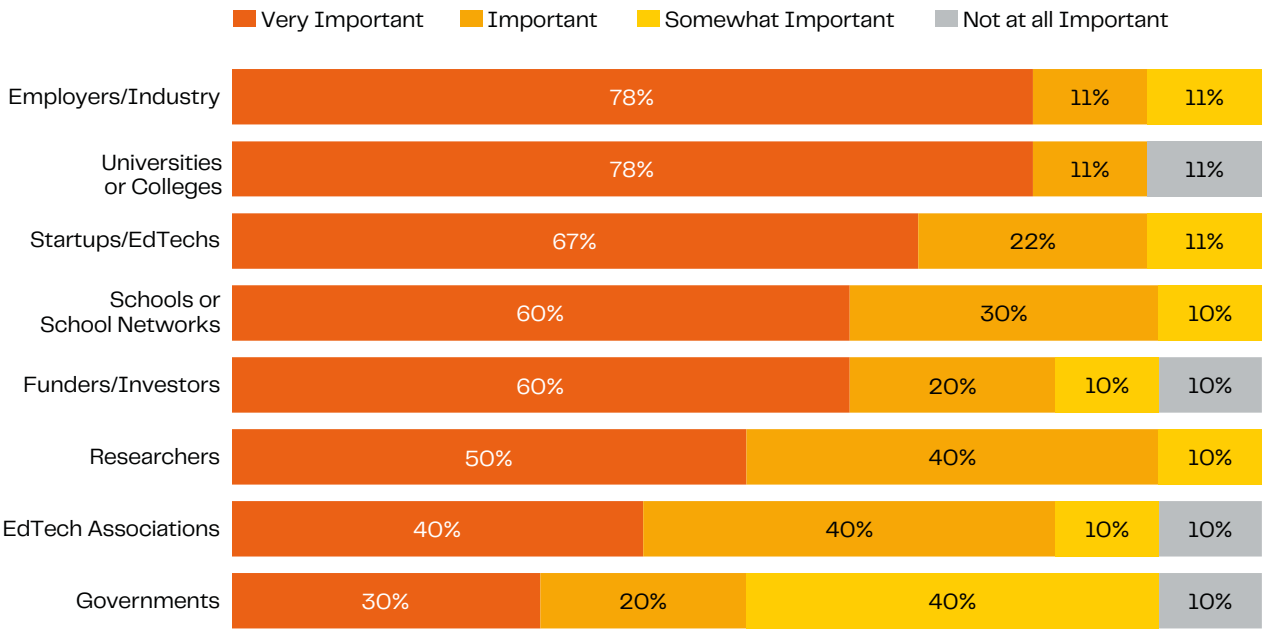
Figure 5. Success Measures, Challenges, Opportunities & Key Activities for Research Aligned ETE Hubs.



Source: HolonIQ by QS

Research-Aligned ETE Hubs place highest importance on employers/industry and universities, with 78% rating both as "very important" as seen in Figure. 6. EdTech startups and schools also rank highly, reflecting their role in bridging research, institutional infrastructure, and real-world application. Researchers themselves are important, though slightly less dominant than institutional partners. Compared to the Pilot Programs Archetype, this model is less founder-centric and more structurally oriented around institutional collaboration and workforce alignment.

Figure 6. Stakeholder importance – Research Aligned ETE Hub Archetype



Source: HolonIQ by QS

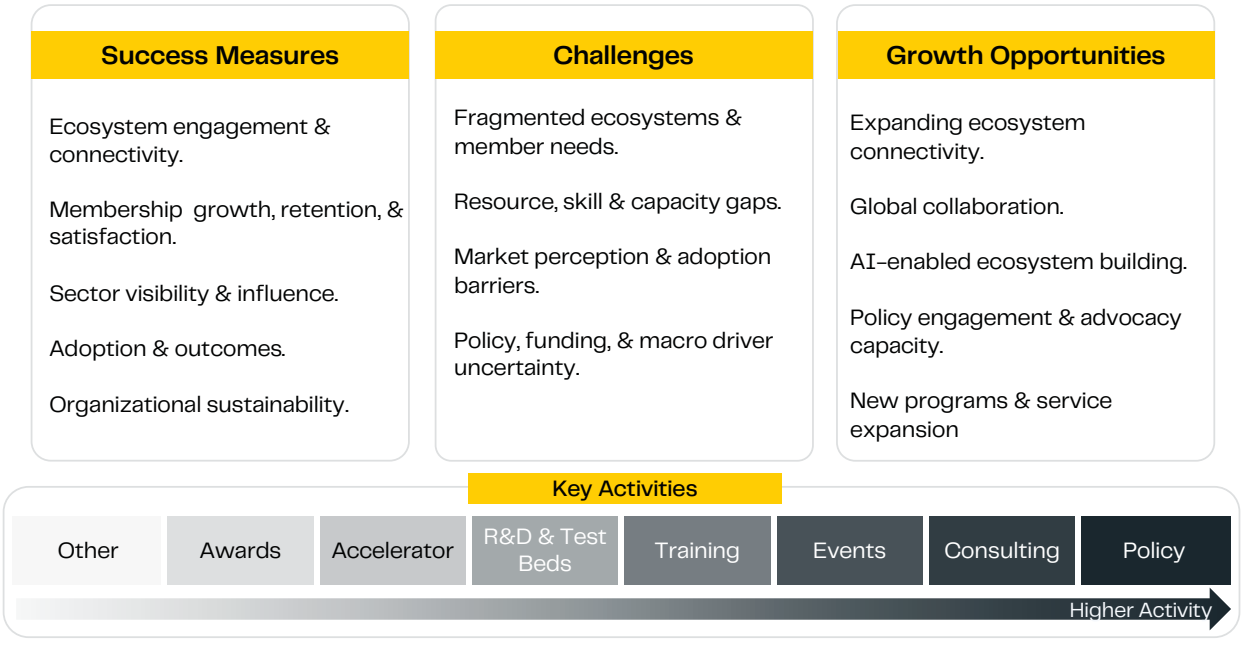
Archetype 3:

Network Connectors

Network Connector ETE Hubs are typically membership-based Hubs focused on convening, knowledge exchange, brokerage, and ecosystem visibility. They act as connectors across EdTech startup founders, educators, policymakers, funders, and industry partners, exercising influence primarily through coordination and working to align or affect policy. While some offer consulting services or host events, these activities generally support their broader role as ecosystem intermediaries rather than defining their core structure.

These models are particularly valuable in fragmented ecosystems where coordination gaps are pronounced. However, financial sustainability is closely tied to membership engagement, sponsorships, and project-based funding, creating exposure to fluctuations in participation and sponsor priorities.

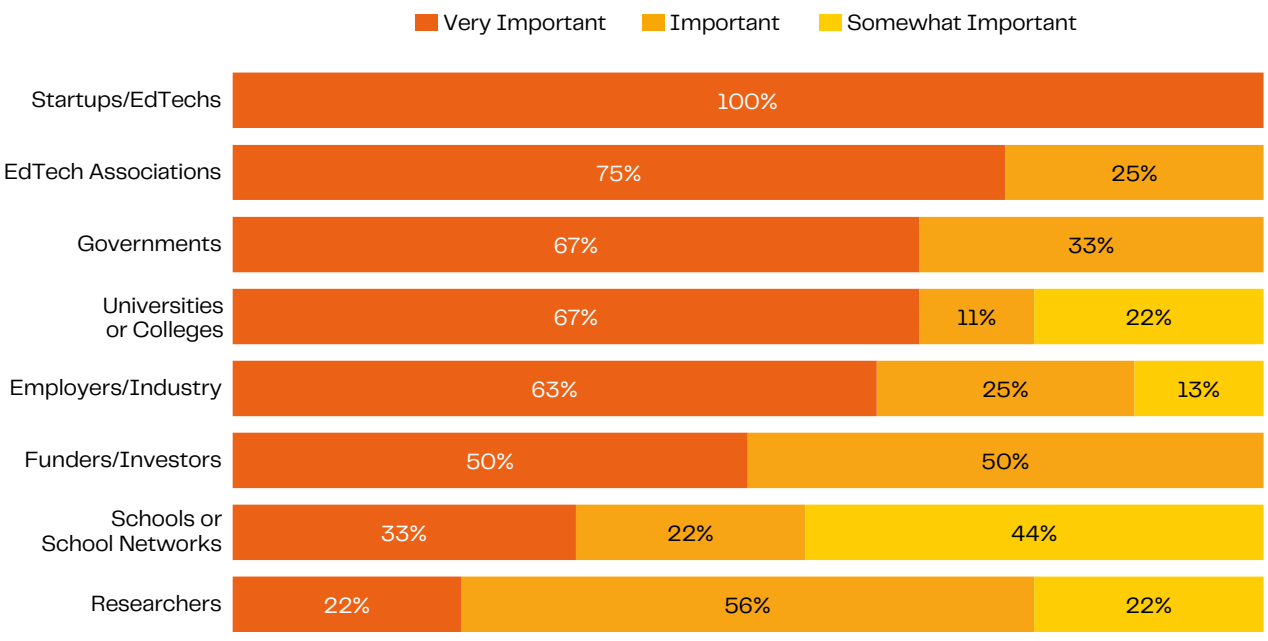
Figure 7. Success Measures, Challenges, Opportunities & Key Activities for Network Connector ETE Hubs.



Source: HolonIQ by QS

Network Connector ETE Hubs place startups and EdTech companies at the centre, with 100% rating them as “very important,” as seen in Figure. 8, but their stakeholder emphasis is broader than founder support alone. EdTech associations, governments, universities, and employers all rank highly, reflecting a coordination-driven model that spans policy, industry, and institutional actors. Funders are important, though less dominant than in the Pilot Program Archetype, while schools and researchers tend to be secondary partners. The pattern reinforces their role as ecosystem intermediaries rather than program operators.

Figure 8. Stakeholder importance – Network Connector ETE Hub Archetype

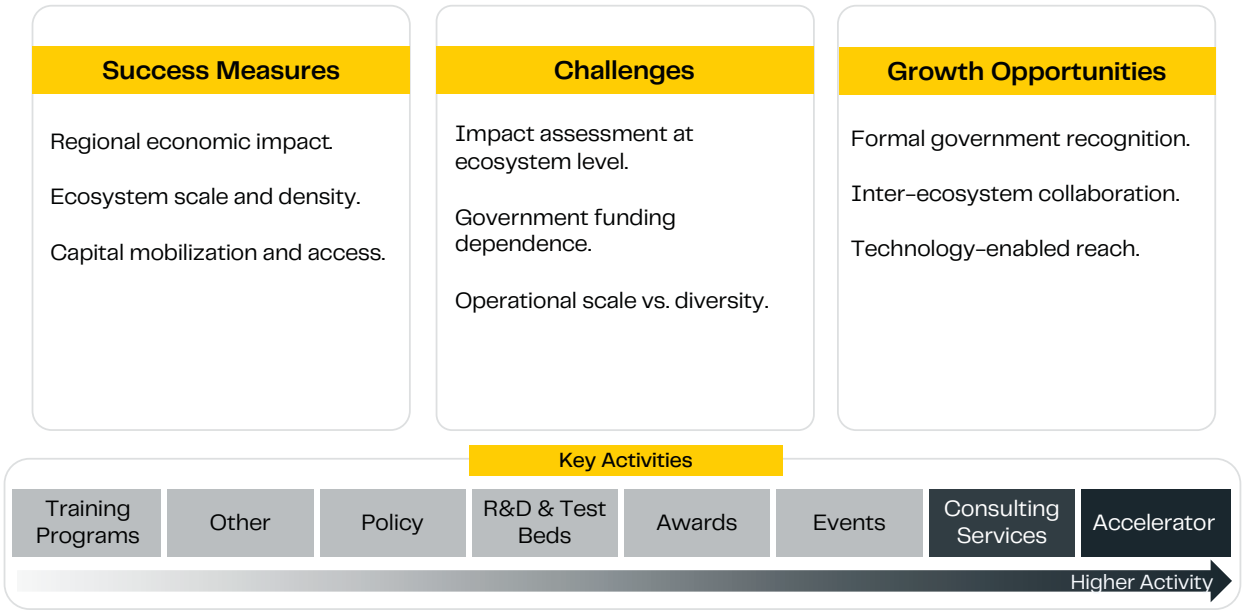


Source: HolonIQ by QS

Archetype 4:
Ecosystem Anchors

Ecosystem Anchor ETE Hubs are aligned with or supported by public entities and embedded within local or regional education strategies. Rather than influencing policy from the outside, they often emerge as a result of policy priorities and public investment frameworks, operating within defined strategic mandates. They link innovation pipelines with procurement pathways, adoption environments, and system-level infrastructure, extending beyond individual programs to broader ecosystem coordination. Advantages associated with this structural alignment include clearer pathways into public systems and, in several cases, more stable funding arrangements. At the same time, procurement rules, political cycles, and institutional risk constraints can shape experimentation timelines and limit operational flexibility.

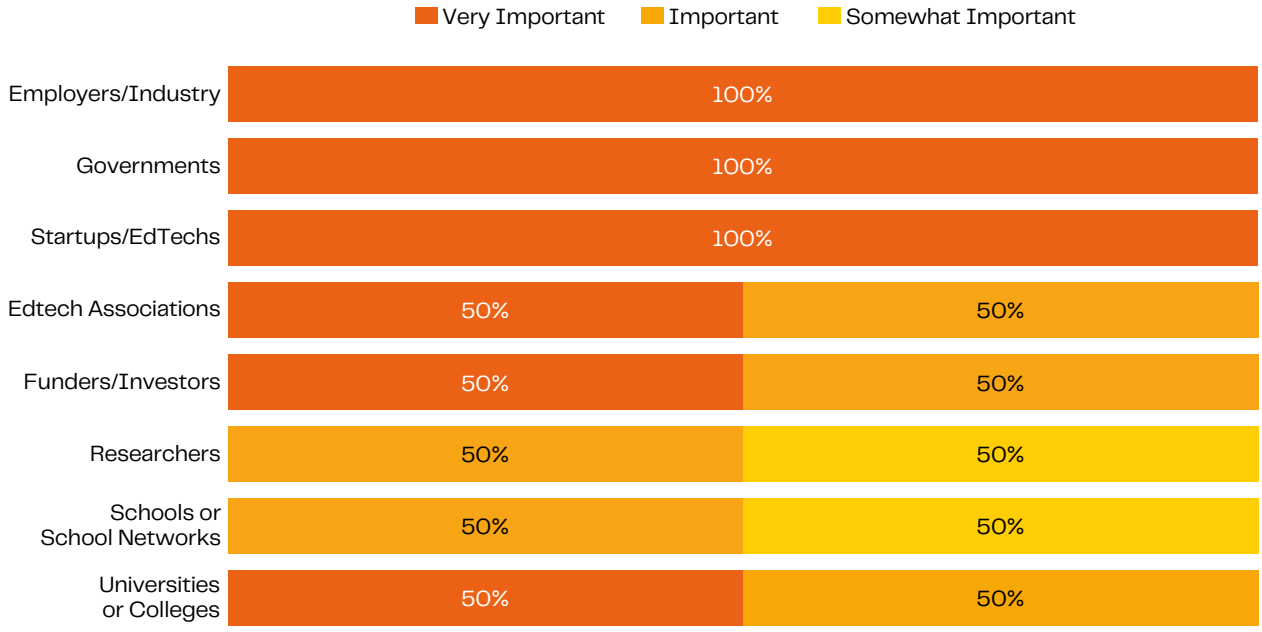
Figure 9. Success Measures, Challenges, Opportunities & Key Activities for Ecosystem Anchor ETE Hubs



Source: HolonIQ by QS

Ecosystem Anchor ETE Hubs identify employers/industry, governments, and startups as unanimously “very important,” reflecting their system-level mandate and alignment with public strategy and workforce priorities. Universities and funders also rank highly, while researchers and schools appear as important but less central actors. Although the sample size is small, the pattern suggests a structurally embedded model that operates across policy, industry, and innovation pipelines rather than centering on a single stakeholder group.

Figure 10. Stakeholder importance – Ecosystem Anchor ETE Hub Archetypes



Source: HolonIQ by QS

Different Models, Shared Lessons

Across participating ETE Hubs, Pilot Program and Network Connector Archetypes appeared most frequently, reflecting how many ecosystems currently rely on program-led and membership-based structures. Research-Aligned and Ecosystem Anchor Archetypes were fewer, but typically more deeply embedded within institutions and longer-term strategies.

The structural differences across the models shape funding stability, experimentation timelines, and system integration, and across the organizations, common pressures and success enablers emerge. Regardless of archetype, ETE Hubs are navigating sustainability constraints, coordinating diverse stakeholders, and demonstrating value within education and workforce systems. The following sections examine shared dynamics of where approaches diverge and lessons converge.

Challenges Facing EdTech Ecosystem Hubs

EdTech Ecosystem Hubs face shared challenges despite regional variation

Despite differences in geography, structure, and mandate, EdTech Ecosystem Hubs operate under a common set of pressures. While local context shapes how these constraints manifest, similar forces affect sustainability, effectiveness, and system-level engagement across regions. These challenges cluster around three interrelated areas: structural fragility, innovation without infrastructure, and coordination deficits.

Figure 11. Top challenges for EdTech Ecosystem Hubs

Challenges	What leaders of EdTech hubs are saying
Structural Fragility	"Government and industry support, connections to stakeholders such as schools" "Lack of Pan-European structural cooperation" "Lack of governmental funding"
Innovation without Infrastructure	"Finding a sustainable business model that ensures they exist for an extended period of time" "Innovators not having evidence to back their work and products"
Coordination Deficit	"Government bureaucracy" "Public sector unpredictability" "Lack of connection in education industry"

Source: HolonIQ by QS

Structural fragility

Many ETE Hubs operate on unstable financial and institutional foundations. Public funding is often inconsistent, limited in duration, or tied to political cycles, complicating long-term planning. Industry backing may be episodic rather than sustained, and cross-border or regional coordination mechanisms remain underdeveloped in many ecosystems. As a result, ETE Hubs frequently depend on short-term grants or philanthropic support, increasing volatility and constraining investment in staff capacity, operational systems, and sustained programming.

As one leader noted, the challenge is often less about launching initiatives and more about "finding a sustainable business model that ensures we exist for an extended period of time."

Innovation without infrastructure

ETE Hubs face pressure to advance innovation in systems that may not be ready to adopt it. Startups are encouraged to build new digital solutions, while schools and training providers often lack connectivity, interoperable systems, or the skills to integrate them effectively. Generating credible evidence of impact remains difficult when pilots are short-term or disconnected from adoption pathways. This dynamic leaves ETE Hubs facilitating experimentation in environments where scaling conditions are uncertain.

Coordination deficit

Limited alignment across governments, education providers, industry, and education startups continues to constrain ecosystem progress, and fragmented governance structures, bureaucratic friction slow momentum. While government participation is essential for system-wide adoption, procurement timelines and ambiguous policy signals can stall innovation. The absence of shared platforms, standards, or consistent convening further limits alignment and reduces the likelihood of moving beyond isolated pilots.

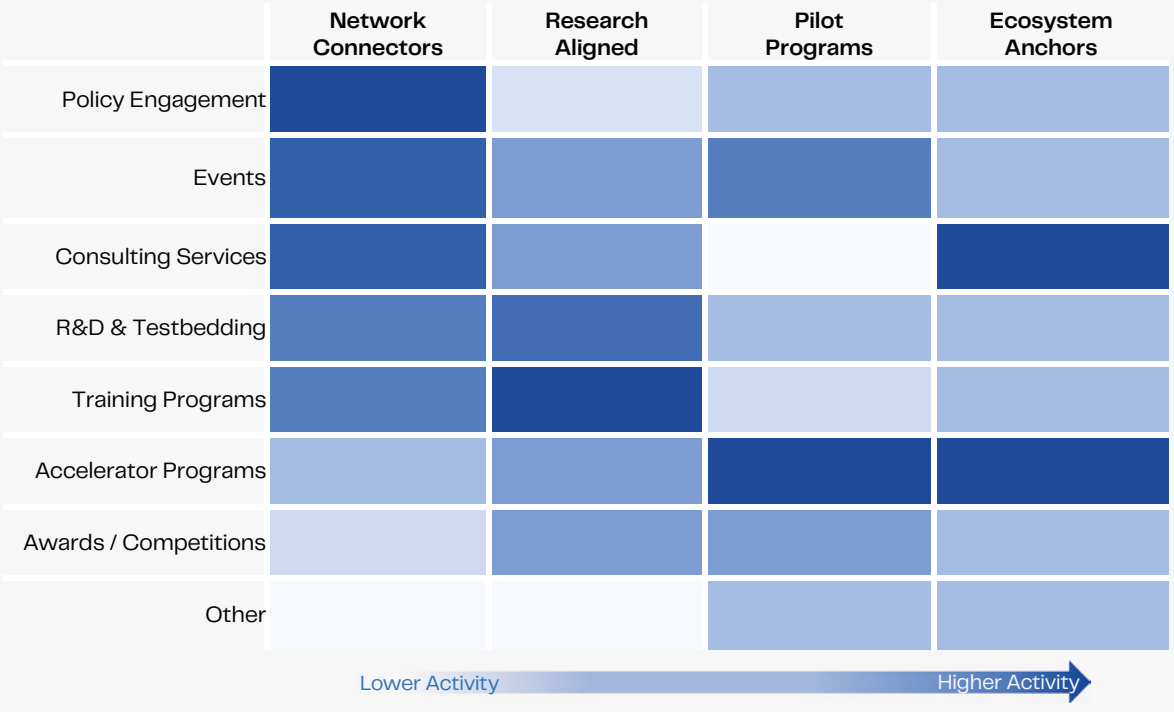
How challenges shape ETE Hub activity and stakeholder engagement

Operational challenges such as funding uncertainty and limited ecosystem coordination shape how EdTech Ecosystem Hubs operate and where they focus effort. Rather than converging on a single model, Hubs adapt their activities to remain viable and relevant within local contexts, resulting in differentiated programs and services.

Network Connectors, membership- and network-based hub archetypes emphasize convening, policy engagement, and events. While the Pilot Programs, accelerators and incubators, prioritize structured programs aligned with funder expectations and startup pipelines. Research Aligned archetypes, those that are university-affiliated, focus more on testbedding and training, leveraging institutional capacity and access to learning environments. Hybrid models combine functions to diversify revenue and reduce financial risk.

Across archetypes, activity choices reflect pragmatic responses to funding realities, policy environments, and infrastructure constraints. Diversification signals adaptation within complex education ecosystems rather than deviation from their core missions.

Figure 12. Activities by EdTech Ecosystem Hubs, by Archetype, 2025.



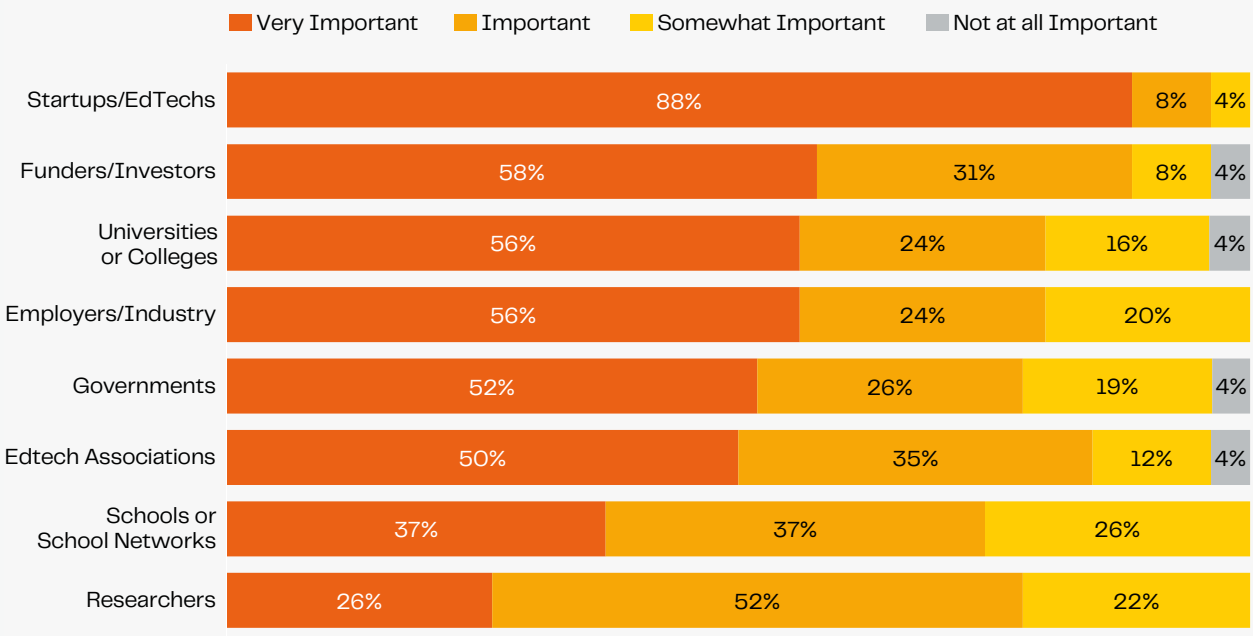
Source: HolonIQ by QS

Stakeholder priorities reinforce diversified Hub Archetypes

EdTech Ecosystem Hubs operate within dense, multi-stakeholder environments that necessitate diversified operating models. Unsurprisingly, EdTech Startups emerge as central partners, followed by funders, universities, employers, and government agencies. Schools and researchers also play critical roles, particularly in providing access to authentic learning environments and testbed settings.

Sustaining engagement across this stakeholder landscape requires a mix of convening, training, pilot programs, research collaboration, and policy alignment. Diversification for these Hubs is therefore not incidental; it reflects the need to balance founder support, institutional partnership, public-sector engagement, and evidence generation simultaneously. In complex education systems, maintaining credibility with one group often depends on demonstrating value to others.

Figure 13. Startups, followed by universities and employers, are critical stakeholders to EdTech Ecosystem Hubs.



Source: HolonIQ by QS

Section 3

Success Enablers

Across regions and models, a consistent set of conditions appears to be associated with sustainability and impact. While local context shapes how these enablers are expressed, ETE Hubs reporting stronger positioning tend to demonstrate capability across several of them. These reflect active capacities, rather than simply the absence of constraints, that support adoption of EdTech, credibility of their work, and longer-term engagement within education ecosystems.

Policy and system alignment

Alignment with education policy, procurement pathways, and public-sector priorities is frequently associated with stronger Hub positioning. Early and sustained government engagement can reduce friction between innovation and implementation, particularly where public agencies act as partners rather than solely as buyers. Where alignment is more developed, clearer pathways often emerge from pilots to broader system engagement.

> The city is not acting as a buyer here, but as a partner.
>
> ETE Hub leader, Europe

Innovation ecosystem coordination and network brokerage

Effective ETE Hubs often extend beyond program delivery to active coordination across EdTech startups, educators, researchers, funders, industry, and policymakers. Trust, relationship depth, and informal networks were commonly cited as central to this brokerage role, especially in environments where formal governance structures are limited. In several cases, coordination capacity itself was viewed as a primary source of ETE Hub value.

> Our value is not just acceleration. It's coordination.
>
> Network ETE Hub operator, Global

> [We] connect people who normally would not meet [in our market].
>
> Network & EdTech Leader, Asia.

Access to real-world market environments

Proximity to schools, learners, and education providers is widely seen as enabling faster validation, evidence generation, and institutional credibility. Hubs facilitating access to authentic learning environments report stronger pathways toward adoption, particularly for early-stage ventures navigating complex education systems.

> [We need] partners who want to support the programs EdTech Hubs run, research about what works in Africa, and more market access to government schools.
>
> ETE Hub leader, Africa

Connectivity to capital and patient funding

Access to diverse funding sources such as philanthropic, public, and long term capital was closely linked to both ETE Hub sustainability and startup survival. Patient capital is frequently highlighted as especially important for early-stage innovation, equity-focused initiatives, and work not immediately supported by market demand. Longer funding horizons appear to create greater flexibility for collaboration, experimentation, and investment in evidence generation.

> We fund things the market will not fund on its own.
>
> Philanthropic funder and Research-Aligned ETE Hub, United States

Embedded university and research connections

Strong university and research linkages are commonly associated with increased rigor, credibility, and talent development. Researcher involvement can strengthen evidence generation, applied learning, and policy engagement, while alignment with university missions may reinforce legitimacy, particularly in systems where institutional validation carries weight.

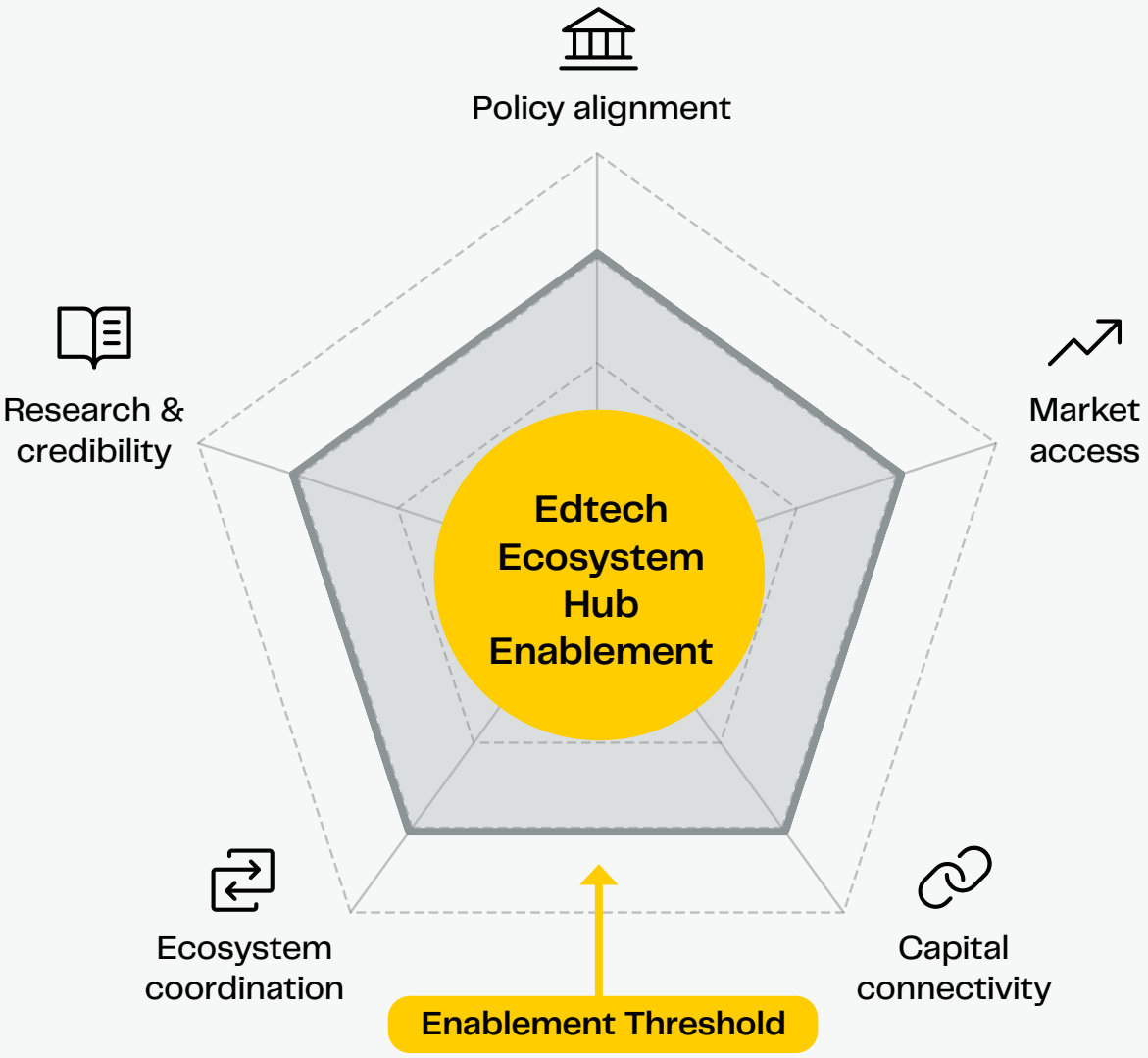
> Researchers work directly with startups to translate research into practice.
>
> University-affiliated ETE Hub leader, Europe

Figure 14 illustrates 5 Success Enablers associated with sustained ETE Hub effectiveness. Policy alignment, market access, capital connectivity, ecosystem coordination, and research access and credibility operate as interconnected capacities rather than isolated strengths. They position ETE Hubs to bridge innovation and implementation, linking EdTech startups to public systems, capital to experimentation, research to practice, and coordination to adoption. While few ETE Hubs demonstrate equal strength across all five dimensions, those that develop complementary capability across multiple areas appear better positioned for long-term ecosystem impact. The challenges documented in this report reflect the conditions of the ETE hubs are working to change.

ETE Hubs operating in environments where policy pathways are clearer, capital is more patient, or institutional partnerships are more embedded tend to report stronger outcomes, not because they are better managed, but because more of the conditions for impact are already in place.

Figure 14 visualizes this as a enablement profile. The pentagon is not a scorecard of what a hub has achieved. It is a map of what the environment affords. Where the profile is thin, the question to ask is not “what is this hub missing?” but “what does this ecosystem still need to provide?” Few hubs report equal strength across all five dimensions. The enabling conditions are distributed across regions, funders, governments, universities, and markets. No single hub controls them all. What distinguishes hubs reporting stronger positioning is less their individual capability and more the density of relationships that connect those conditions to their work.

Figure 14. Success Enablers for Edtech Ecosystem Hubs



Source: HolonIQ by QS

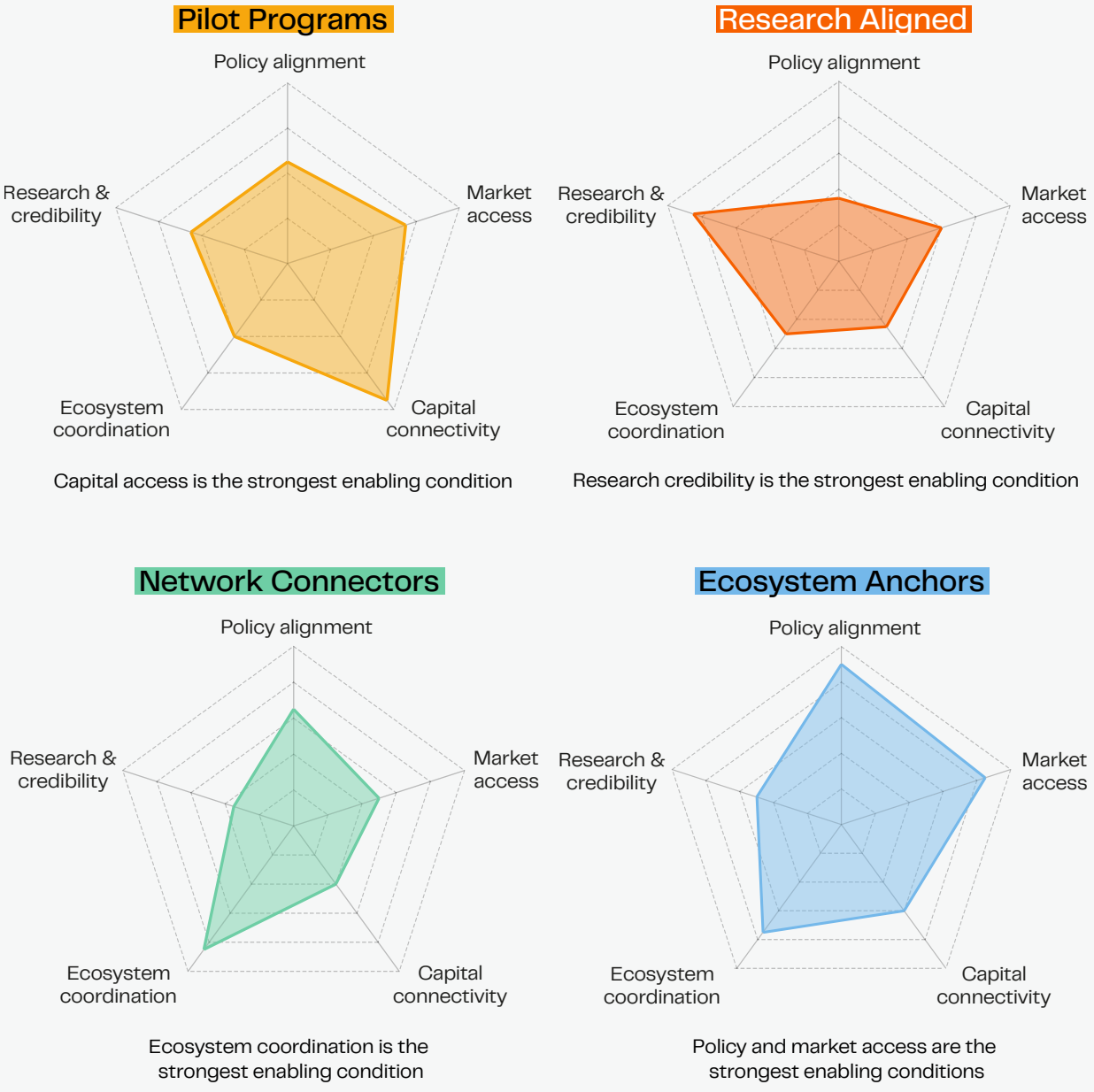
Hub effectiveness is associated with the presence of enabling conditions, not the absence of challenges. The grey area marks the conceptual enablement threshold.

Figure 15 applies the enabling environment framework to the four ETE Hub archetypes. Each profile maps the conditions that participating hubs most commonly operate within, but not as a measure of what a hub has built, but as a reflection of the ecosystem context that shapes what is possible.

The profiles are intended to be read as shapes, not scores. A hub operating within a strong university connection and research environment but a thinner policy landscape is not underperforming on policy, rather it is working within the conditions available to it. The shape reveals where the enabling environment concentrates, and which dimensions may benefit most from external investment or inter-hub collaboration.

The four profiles make visible what the aggregate obscures: archetypes are not simply different activity models, they are different enabling environments. Pilot Programs operate where capital access is most present but coordination is thinner. Research Aligned hubs are surrounded by strong institutional credibility but constrained on policy. Network Connectors are embedded in coordination-rich environments where capital pathways are less direct. Ecosystem Anchors benefit from the broadest enabling conditions across policy and market access, a reflection of their structural alignment with public systems. This framing carries a practical implication. Where an ETE Hub's profile shows thin enablers, the response is not to ask more of the hub. It could be to ask what funders, governments, universities, and peer hubs can do to strengthen the conditions around it.

Figure 15. Enabling environment profiles by archetype



Source: HolonIQ by QS

A note on comparability: Profiles are derived from stakeholder importance ratings, structural descriptors, and challenge data across archetypes. Scores are normalised to a common scale to allow shape comparison across archetypes with different sample sizes. They reflect the conceptual; enabling environment each archetype operates within, not a performance assessment of the hub itself. Ecosystem Anchors (smallest sample) rely more heavily on structural descriptors than survey data.

Unlocking Systemic Barriers

Rather than eliminating system barriers, EdTech Ecosystem Hubs can activate specific stakeholders to address them. Fragmentation is countered through coordination; limited adoption through market access; funding volatility through capital connectivity; research–practice gaps through embedded credibility; and policy bottlenecks through system alignment.

In this model, enablers become operational levers. Each barrier corresponds to a relationship that, when activated, unlocks a distinct outcome—from faster collaboration and real-world validation to sustainability and scale. ETE Hub success therefore lies less in standalone programming and more in the ability to connect the right stakeholders to the right constraints at the right time.

Few ETE Hubs demonstrate equal strength across all five enablers. Capabilities are often distributed, policy alignment in one context, research depth in another, market access elsewhere. This unevenness creates a practical rationale for inter-Hub collaboration, where shared networks and coordinated activity can extend reach beyond individual structural limits.

Figure 16. Unlocking pathways to EdTech Ecosystem Hub success.

System Barrier	Success Enabler	Success Activator	What It Unlocks
Fragmented ecosystem	Ecosystem coordination	Startups & Intermediaries	Faster collaboration, reduced duplication, resource sharing
Limited adoption/pilot of EdTech	Market access	Schools & Learners	Real-world validation, buyer credibility, faster iteration
Funding volatility	Capital connectivity	Investors & Philanthropy	Sustainability, variety of capital opportunities, follow-on funding
Research–practice gap	Research & credibility	Universities & Researchers	Pedagogical rigor, legitimacy, network of talent
Policy bottlenecks	Policy & system alignment	Government & Policy Systems	Scale, procurement pathways, long-term durability and funding

Source: HolonIQ by QS

Opportunities for EdTech Ecosystem Hubs

ETE Hubs as strategic ecosystem orchestrators

The role of EdTech Ecosystem Hubs is expected to expand within education and workforce systems. While edtech startup support and program delivery remain foundational, there is increasing emphasis on shaping how innovation is directed, validated, and adopted at a system level.

Cross-border collaboration and global positioning

Interest in international collaboration is expanding, even as ETE Hub activity remains locally grounded. Engagement in peer networks, global convenings, and cross-regional partnerships is increasingly viewed as a way to strengthen local positioning rather than replicate a single model. Cross-border exchange provides comparative insight, access to external capital and partners, and visibility beyond domestic context. Its value appears less tied to scaling and more to enhancing credibility with policymakers, investors, and institutional stakeholders while opening pathways to tested approaches developed elsewhere.

Guiding technology adoption

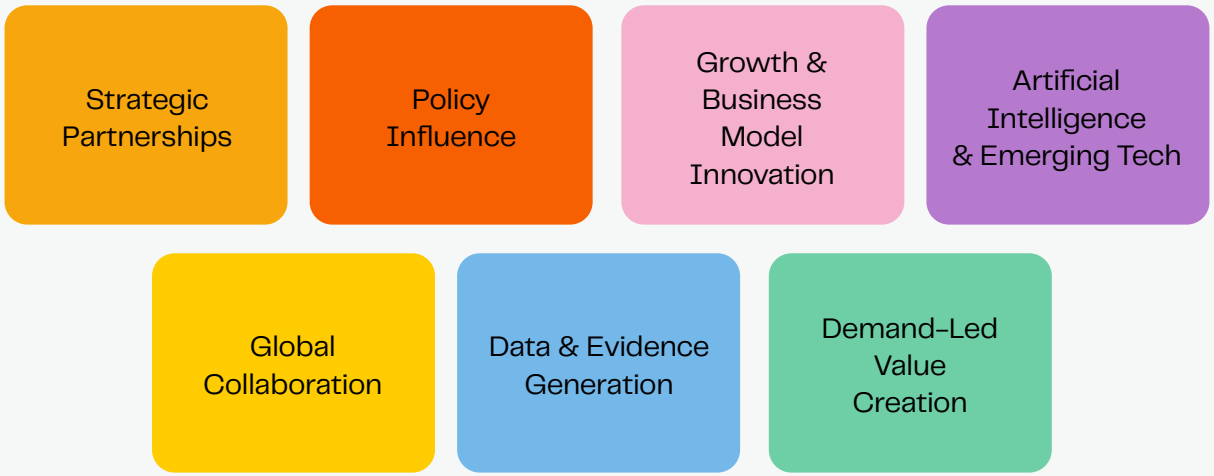
Rapid advances in AI are creating lower barriers to entry for EdTech founders who are increasing experimentation across education markets. This environment may activate the role of ETE Hubs as intermediaries to help institutions, policymakers, and entrepreneurs navigate adoption readiness, implementation approaches, and long-term strategy. ETE Hubs are positioned to interpret emerging technologies within institutional contexts, aligning innovation activity with procurement realities, policy priorities, and workforce needs. In this framing, influence derives from shaping direction, not simply supporting the volume of new EdTech solutions created.

Evidence and insight generation

Demand for credible signals about what works in education and for whom in what context appears to be rising. ETE Hubs are increasingly positioned to translate pilots, partnerships, and ecosystem research activity into usable insight for funders, policymakers, and institutional leaders. This intermediary role could extend beyond research publication. It involves connecting data, practitioner feedback, and comparative analysis to inform capital allocation, procurement decisions, and policy design.

These opportunities point to a gradual broadening of ETE Hub function and definition of their success, suggesting that long-term relevance may depend less on activity volume and more on the ability to align networks, evidence, and institutional pathways across

Figure 17. Long-term sustainability for ETE Hubs may depends less on activity volume and more on aligning networks, evidence, and institutional pathways



Source: HolonIQ by QS.

Section 4

Strengthening ETE Hub Positioning

Strengthening EdTech Ecosystem Hubs may depend less on expanding activity and more on increasing strategic leverage. Rather than adding programs, stronger positioning appears linked to initiatives aligned with policy pathways, institutional adoption, and funding continuity.

Prioritizing long-term partnerships

Relationships that open procurement pathways, extend policy influence, or provide longer-term capital appear more consequential than transactional collaborations tied to individual programs. Influence accumulates where partnerships expand access rather than simply increase activity.

Engage policymakers early

Engagement with government leaders can shape longer-term alignment, even when outcomes are uncertain. In education, where procurement-driven systems have extended adoption timelines, visibility and trust built early may matter more than short-term program outputs.

Embed sustainability into operating models

Durability appears closely tied to diversified revenue structures and institutional backing capable of extending beyond grant cycles or political shifts. Where operating models are designed around continuity, ETE Hubs may retain staff capacity, preserve institutional memory, and invest in longer-term ecosystem infrastructure.

Use global insights strategically

Comparative perspectives can help identify recurring constraints and tested approaches, but effectiveness depends on adapting those insights to local institutional, regulatory, and market realities.

These approaches do not eliminate structural constraints. They may, however, increase a ETE Hub's ability to navigate them deliberately, improving the likelihood that innovation efforts translate into sustained system engagement rather than isolated activity.

Section 5

Activating a Global Edtech Ecosystem Hub Community

The Success Enablers identified through this report – policy alignment, market access, capital connectivity, ecosystem coordination, and research capacity, operate less as standalone capabilities and more as sources of leverage within education systems. Their impact is shaped by how effectively they connect and reinforce one another.

EdTech Ecosystem Hubs reporting stronger positioning do not appear to solve for every constraint directly. Instead, they leverage relationships, institutional access, and credibility that allows them to influence how innovation moves through complex systems. In this context, effectiveness is less about the volume of activity and more about the ability to translate limited inputs into broader system engagement.

Leverage is most visible where relationships intersect.

Policy alignment becomes influential when it is grounded in sustained institutional engagement. ETE Hubs working closely with universities, schools, and employers are better positioned to interpret policy signals and shape pathways into public systems. Influence tends to accumulate through credibility and proximity rather than formal authority.

Research and evidence capacity contributes leverage when embedded within implementation contexts. Partnerships with testbed networks, universities, and research bodies strengthen not only the quality of evidence, but its relevance to policy, procurement, and practice.

Market access functions as leverage when ETE Hubs bring knowledge and institutional participation that extend beyond isolated pilots. Universities, education providers, and employers act as gatekeepers to real-world environments; where relationships are durable, validation becomes iterative, lowering the cost and risk of adoption over time.

Coordination functions as the mechanism through which these forms of leverage are activated. It is not a discrete activity, but the condition that allows relationships to compound, linking policy to practice, capital to validation, and research to adoption.

Capital connectivity appears less constrained by availability than by confidence and sequencing. Demonstrated market fit (through institutional engagement, credible validation, or alignment with market demand) reduces perceived risk and enables more continuous flows of funding aligned with education system timelines.

Across ecosystems, these capabilities remain unevenly distributed. Some ETE Hubs operate with strong institutional access but limited capital connectivity; others demonstrate deep funding relationships but weaker links to policy or research. This distribution suggests that no single Hub, or stakeholder group, holds sufficient leverage to independently address systemic constraints.

From this perspective, activating a global EdTech Ecosystem Hub community is less about creating new structures and more about leveraging the connectivity between existing sources.

Where this connectivity strengthens, several patterns emerge:

- Institutional access in one context can support validation in another
- Research capacity can be applied across multiple markets with similar constraints
- Capital can follow demonstrated pathways rather than isolated opportunities
- Policy insights can travel through trusted networks rather than formal replication

These dynamics may extend the reach of individual ETE Hubs without requiring standardization across contexts, relying on aligning complementary strengths rather than duplicating capability. This framing positions global engagement as a means of concentrating and connecting strengths across ecosystems.

It does not replace local coordination, where trust is built and maintained, but can reinforce it by linking distributed capabilities, sharing credible signals, and enabling more consistent pathways from innovation to adoption.

In practice, the effectiveness of this approach depends on the density and durability of relationships across institutions, funders, policymakers, and ecosystem actors. Where these connections remain fragmented, even well-resourced ETE Hubs encounter limits. Where they begin to align, relatively small interventions can generate broader system effects.

What's Next

The conditions that support innovation, policy alignment, market access, capital connectivity, research capacity, and coordination, are distributed across the EdTech Ecosystem globally. How these sources of leverage connect and operate together shapes whether innovation moves from experimentation to adoption.

Several system-level needs emerge:

Synthesis of ecosystem intelligence

While activity across ETE Hubs continues to grow, insight remains fragmented. There is a need to translate local experience, pilot outcomes, and research into signals that can inform decision-making across policy, capital allocation, and institutional strategy.

Continuity across fragmented efforts

Many initiatives operate within short funding cycles or isolated programs. Bridging these efforts across time horizons, stakeholder groups, and geographies may support more consistent pathways from early-stage innovation to system-level adoption.

Translation between stakeholders

Education systems require alignment between actors operating on different timelines and incentives. Interpreting the needs of policymakers, institutions, funders, and entrepreneurs, and connecting these perspectives, remains a critical but underdeveloped function.

Shared approaches to evidence and validation

Demand for credible, context-sensitive evidence continues to increase. Developing more consistent ways to generate, interpret, and apply evidence across ecosystems may reduce duplication and strengthen confidence in adoption decisions.

These needs point toward a set of enabling functions that extend beyond any single Hub or stakeholder group. They reinforce the importance of neutral, ecosystem-level perspectives that can connect distributed capabilities, identify patterns across contexts, and support more informed engagement across the system.

HolonIQ by QS contributes to this landscape through global market intelligence, research, and convening, engaging with EdTech Ecosystem Hubs, institutions, funders, and policymakers. This work will continue to evolve in response to the needs and priorities of the field.

For stakeholders interested in engaging with this work or contributing to future research and collaboration, further information is available through HolonIQ by QS.

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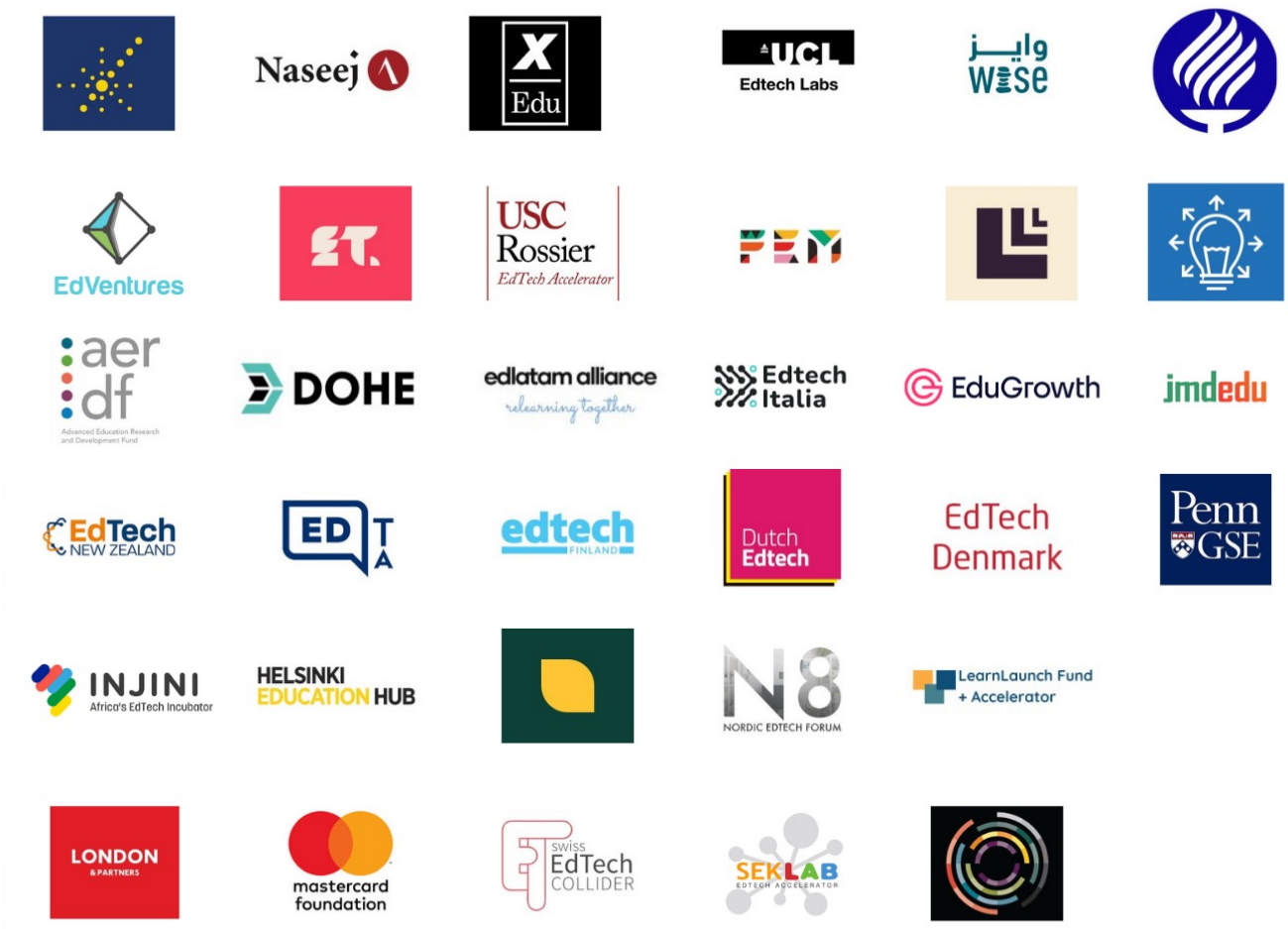
Keep up-to-date on Innovation Insights about AI and Digital Innovation.



Section 6

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EdTech Italia

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SEK Labs

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This list reflects organizations engaged in the research process and does not imply endorsement of specific models or approaches. Any errors or omissions are unintentional.

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