Wireless Learning:
Development of China’s Online Education
China Online Education Research Institute is an organization dedicated to the research, consulting, and service of Chinese online education industry. It mainly covers the following functions:

- Program consulting: provide consulting service on online education industry;
- Research report: compile industrial research report and provide authentic industrial research achievements;
- Technical training: train talents for the online education;
- Academic seminar: organize large- and medium-scale online education seminars to promote the industrial development;
- Product study: study and test the latest online education products and technologies;
- Exchange activity: organize all sorts of exchange activities and propel communication in online education industry.
媒体报道 (Media & Press)
发展阶段 (History of Online Education Industry in China)

1998-2005
- Enormous capital inflows
- Springing-up of many companies
- Closure of many companies

The first wave/bubble period

2006-2011
- Entry/exit of many companies
- Feeling its way
- Slowly developing

Fluctuation period

2012-2015
- MOOC
- Flipped classroom
- Khan Academy
- edu.yy.com

The second wave
巨额资本发力 (Large Investment)

单位：亿元 (Unit: billion YUAN)
National Policy

Three Connections
Two Platforms
Initiative

Action Plan for
Promoting Scientific
Literacy

国家政策(National Policy)
Market Size of Online Education in China

- Education Digitalization (B2G) - 78, 3%
- Online Education (B2C/B2B2C) - 365, 14%
- Technical Service Provider - 2170, 83%

Unit: hundred million YUAN
Market Size of Education Digitalization (B2G)

2013-2015 Market Size of Education Digitalization in China (B2G)
Market Size of Online Education in China (B2C)

2013-2015 Market Size of Online Education in China (B2C)

Unit: hundred million  Data Source: COERI
细分市场 (Segmentations)

- 中小学教育 (Primary & High school)
- 学前教育 (Pre-school)
- 职业教育 (VET)
- 高等教育 (Higher)
- 企业培训 (Enterprise Training)
- 语言学习 (Language Learning)
- 综合领域 (Comprehensive)
- 技术服务提供商 (Technical provider)
- 平台服务提供商 (Transaction provider)
- 出国留学 (Study abroad)
- 干部培训 (Cadre training)
角色分布 (Breakdown of Players)

- 内容资源 (Contents developer): 66.5%
- 教学平台 (LMS provider): 12.3%
- 基础服务 (Base service provider): 7.8%
- 综合 (Comprehensive): 7.0%
- 硬件设备 (Hardware provider): 2.6%
- 工具软件 (Tools provider): 1.9%
- 其他: 1.0%
企业区域分布 (Company Distributions)

Company Distribution

9600+ companies
<table>
<thead>
<tr>
<th>名称 (Name)</th>
<th>网址 (website)</th>
<th>发布时间 (Launch time)</th>
<th>主办单位 (Founder)</th>
<th>课程类型 (Course category)</th>
</tr>
</thead>
<tbody>
<tr>
<td>学堂在线</td>
<td><a href="http://www.xuetangx.com">www.xuetangx.com</a></td>
<td>Oct. 2013</td>
<td>清华大学 (Tsinghua University)</td>
<td>云计算、数据科学、计算机、社会科学、生命科学、思维训练等 (Cloud Computing, Data Science, Social Science, Bioscience, Thinking training, etc.)</td>
</tr>
<tr>
<td>北大慕课</td>
<td>mooc.pku.edu.cn</td>
<td>Mar. 2013</td>
<td>北京大学 (Peking University)</td>
<td>社会科学、生命科学、经济学、创业训练等 (Social Science, Bioscience, Economics, etc.)</td>
</tr>
<tr>
<td>好大学在</td>
<td><a href="http://www.cnmooc.org">www.cnmooc.org</a></td>
<td>Apr. 2014</td>
<td>上海交通大学 (Shanghai Jiao Tong University)</td>
<td>理学、工学、医学、文学、法学 (Science, Engineering, Medicine, Literature, Law)</td>
</tr>
</tbody>
</table>
融资状况 (Financing & Investment)

- 天使投资期百分比 (Angel Investment)
- PreA 百分比 (PreA round)
- A 轮百分比 (A round)
- B 轮百分比 (B round)
- C 轮百分比 (C round)
- D 轮百分比 (D round)
- 没有融资百分比 (Zero Financing)
盈亏情况 (Profit and Loss)

- 盈利 (Profit): 5%
- 持平 (Even): 10%
- 死亡 (Closed Down): 15%
- 亏损 (Loss): 70%
大玩家浮出水面 (Successful Players)
BAT的布局 (Chinese Internet Giants’ Education Pivot)

百度传课 (Baidu Chuanke)
作业帮 (Homework Assistant)
智课网 (Smartlearning)

腾讯课堂 (ke.qq.com)
腾讯校园 (Tencent Digital School)
疯狂老师 (Crazy Teachers)
易题库 (Easy Item Bank)

淘宝教育 (Taobao Edu)
VIPABC
并购了欧洲第二大企业培训企业德莫斯、凌鸿教育等
• Acquired DEMOS from Europe, Linghong edu etc.
热点行业（Key Education & Training Fields）

- 中小学 (K12)
- 高教/高职 (Higher Edu/VET)
- 科技教育 (Science & Tech)
- 创业教育 (entrepreneurship education)
技术展望 (Technology Hotspots)

- STEM课程
- 教育类VR
- 人工智能
- 智能硬件
国际合作趋势 (International Collaborations)

美国在线教育展
(USA online education show)

韩国在线教育展
(Online education delegation to Korean)
III. Overview of industry development

The number of Chinese companies in the field of online education is estimated at about 950 by the end of 2015. In this paper, online education includes primary education, pre-school education, adult and secondary education, higher education, vocational education, study abroad, language learning, IT applications in education, and comprehensive projects. Typical companies exist in all subfields.

There are about 2000-4000 companies engaged in K12 online education that grow by leaps and bounds. About 200,000 people work in this industry, including teachers, course developers, technical providers, video recording, and online teaching providers and others. This number of people working in the online education industry is on the rise as people become increasingly happy to accept this convenient learning way—online teaching.

In terms of the number of users, the fields may include K12, vocational education, language learning, and others. In addition, technical service providers, which play a role in the field of education, also develop very quickly.

1. Growth of revenue above 70% on average

The fast rise in the number of users of online education industry is not unexpected. The development of online education makes education resources unlimited by time and space, enabling students and teachers to give full play to their individuality and make use of real data while teaching clearly saving a lot of unnecessary spatial instructions and troubles.
Thanks! Welcome to contact us!

- 中国互联网教育研究院  吕森林
- Forrest Green (Dean of China Online Education Research Institute)
- Mail: lvsenlin@medu.org.cn
- MP: (+86)158-0125-9163
- WeChat: 15801259163