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**« EXPANSION OF RUSSIAN EDTECH COMPANIES TO THE WORLD  
MARKET »**

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The research work explores the practical aspects and main directions of EdTech companies while entering the world market, analyzes the challenges and difficulties faced by Russian EdTech companies when entering the international market, and assesses the prospects for further entry and development of Russian EdTech companies abroad.

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## Introduction

The emergence of COVID -19 has affected the transformation of all areas, including education, forcing people to adapt to the new conditions of the educational process. The governments of most countries turned out to be unprepared for the challenges they faced, their practical measures were formed ad hoc. Almost all over the world, educational institutions were temporarily closed, and students were transferred to distance learning.

Distance learning and new requirements for the provision of the educational process have become a challenge for the education system. One of the trends that became widespread at that time was EdTech - educational technologies. Their essence lies in the introduction of digital technologies and innovative methods of teaching and learning . EdTech can provide success for companies growing in this market through the use of the following tools:

personalization: the educational process moves away from the concept of "lesson" to the concept of a topic/block/module, each participant chooses his own pace of learning, the scale of progress and achievements motivates for further growth;

gamification: learning through play for both adults and children;

accessibilit: the educational process can be carried out regardless of the time and location of the student;

fast pace of adaptation: programs adapt to the needs of the market, and updating content is many times faster than updating educational programs;

the possibility of microlearning - learning when content is presented in small parts, each of which has one specific goal<sup>1</sup>.

Accordingly, there is a need to explore the practical aspects and main directions of EdTech companies when entering the global market, assess the challenges and difficulties faced by Russian EdTech companies when entering the international market, and assess the prospects for further entry and development of

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<sup>1</sup> Sber <https://sberuniversity.ru/glossary>

Russian EdTech companies abroad.

### **EdTech market in Russia**

Today, the main development of EdTech falls on China, the United States and some European countries, the Russian EdTech market is not yet so saturated, but there are educational platforms, mostly free and professionally offering a wide range of educational programs.

According to the analytical company HolonIQ, 11 domestic educational projects were included in the list of the best EdTech projects in Eastern Europe. Most of the projects are educational, including: training in IT specialties, learning foreign languages, preparing for exams or informing about news and opportunities in the field of education. And two projects from the category Talent Acquisition to help you find a job. Domestic companies make up 10% of the total number of the best EdTech companies in Eastern Europe.

During the COVID-19 pandemic, the educational technology market has become more in demand. In 2021, the costs of online education exceeded the costs of offline education (an example is the spending of Russians on FVE - 214 billion rubles were spent by users on offline FVE and 226 billion rubles were spent by users on online FVE<sup>2</sup>, 12 million people were trained offline, and 18 million people - online<sup>3</sup>). Interest in EdTech will be supported by 24/7, universal access to personalized learning and the presence of a large number of companies in the field of online education. In the Russian Federation, due to attracting investments, the market is growing rapidly. Investing in Edtech takes place mainly in the form of crowdfunding or attracting investments from international venture funds.

### **Global EdTech Market**

Since the 2010s the world's leading universities have begun to publish their

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<sup>2</sup>For the first time, Russians spent more on online education than offline <https://www.vedomosti.ru/media/articles/2022/06/01/924747-rossiyane-onlain-obrazovanie>

<sup>3</sup> Netology. Research of the Russian online education market 2021 and trends of 2022 from industry leaders. [E-resource]. Available at: URL [https://netology.ru/edtech\\_research\\_2022](https://netology.ru/edtech_research_2022)

courses online. Now there are many affordable courses that allow you to gain not only new knowledge or skills, but also certain professional qualifications. After successfully completing the course, students receive certificates recognized by more than 140 international companies, including Google , Intel , Bank of America and others. This acts as a powerful motivation for young professionals. In secondary education, EdTech is also gaining popularity. These are AR / VR technologies (augmented reality / virtual reality / augmented reality) that will help to conduct expeditions, dangerous experiments, immersions in the human body or the structure of the cell. Important is the transition to microlearning , which is a logical adjustment to clip thinking. Volumetric themes are being replaced by microthemes . The student from small particles (topics) develops a general idea of the studied .

Modern gamification increases interest in learning: short videos instead of lectures, games instead of tests. Don't forget the performance scale. The student sees his results for each stage, learning-game motivates to move on. And the comparison comes with personal success.

In recent years, record amounts have been invested in the EdTech market, \$7.7 billion in 2019 and \$ 20.1 billion in 2021, part of which was venture capital injections into the business of unicorn companies, the capitalization of which is more than 1 billion dollars In addition to venture capital, educational technology attracts private investors and private equity funds, which have identified this area as the main one. The giants of the digital world continue to invest in educational startups , strengthening their positions in the global online world. Today, the potential of online education is much more than just listening to lectures online. It was the Internet that made such learning format popular and accessible, and experts are trying to find more successful, effective, efficient and comfortable approaches to the learning process, namely: applications and chat bots , VR/AR/ formats, gamification of the learning process, microlearning , personalization and adaptive learning. And with the advent of more modern devices on the market and the development of Internet technologies, education is moving to a format using

mobile applications.

### **The main directions of EdTech companies when entering the global market**

The global education market is growing at a rapid pace, attracting the attention of both industry “veteran” investors and broader investors financing start-ups mainly in the following educational categories: PreK-12 (preschool education up to 12 years) and K-12 (school education), higher education institutions and business (corporate education). These categories operate in the market as distinct, unique market sub-segments with different end-users and different financing arrangements that require investors to be flexible and interact with the developers of such technologies. Major players ( [Edmentum](#) , [Apex](#) and [Accelerate](#) ) are making significant strides towards acquiring startups in the K-12 category, which remains very attractive, as bright innovations constantly appear on the EdTech market, changing approaches to education and stimulating the active introduction of progressive technologies in the educational process. In 2020 [Stride provider Inc.](#) purchased [by Galvanize](#) (programming training course), which was another step towards diversification.

Most often, investments were attracted by startups at the age of three with B2C products at the early growth stage (there is a finished product and first sales)<sup>4</sup>. In the segment of children's education, Indian (ByJu 's) and Chinese (Yuanfudao, Zuoye, VIPKid) unicorns received the most funding, providing tutoring , homework assistance, exam preparation, and language teaching services. In the adult education segment, American (BetterUp, Articulate, Guild Education, Course Hero, Handshake) and Indian (Unacademy, Emeritus) unicorns that provide online courses, coaching , corporate training marketplace , help with educational materials for students.

The modern European EdTech market is characterized by trends:

The Apprenticeship model is «an internship model that combines training at

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<sup>4</sup> Netology. Research of the Russian online education market 2021 and trends of 2022 from industry leaders. [E-resource]. Available at: URL [https://netology.ru/edtech\\_research\\_2022](https://netology.ru/edtech_research_2022)

the expense of the company and paid full-time work at the level of 35% to 50% of the standard salary for a position» (this model is popular in England, Germany, France). Companies that operate on this model include Multiverse and OpenClassrooms .

The growth of players who provide services in narrow niches, for example, driving, medicine, music. Such companies include Ornikar , Yousician , Lecturio .

Expansion of young European companies to a neighboring or larger market. Thus, the Norwegian Attensi (corporate training with gamification ) expanded through the UK, and the German Lingoda (language training) entered the markets of the USA, Great Britain, and Mexico.

The modern Asian EdTech market is characterized by trends:

Functioning as an aggregator for accessing personalized content (like the Australian Go 1 acting as an aggregator of educational content)

The use of artificial intelligence technologies in their products (Riid introduced the TOEIC exam preparation assistant, which works on the basis of artificial intelligence technologies). Companies are also introducing computer vision, natural language processing, and machine learning technologies into their products.

Presentation on the market of various formats of lifelong learning (Indian Upgrad with higher education programs and advanced training courses or Class 101 with courses to monetize your skills)

The modern Latin American EdTech market is characterized by trends:

Funding projects that target content creators and monetize their activities (e.g. Brazilian Hotmart ). Content creators create their digital product on the platform and pay the company a percentage of sales.

Transfer by private educational institutions of their programs to an online format and access to the stock exchange (for example, the Brazilian Cogna Educação)

Digital Skills Training (Peruvian Crehana , which provides access to training courses) and digital professions.



The modern North American EdTech market is characterized by trends:

A variety of corporate training formats (Articulate , which provides course development software, a marketplace Guild Education with continuing education courses and the opportunity to get a secondary vocational education or higher education, Degreed with retraining courses)

Subscription to courses (Master Class for a subscription provides access to already recorded courses, which are provided in the Edutainment format).

Special attention is paid to projects related to mental health (BetterUp , which also works by subscription, is engaged in coaching and mentoring).

In addition to highlighting regional trends, we can highlight trends by segments of learning.

Compared to 2018 (\$216 million), more than \$6 billion in corporate VR-assisted learning is expected to be funded by 2023. Immersive learning is fueled by scientific and technological advances and the development and widespread adoption of AR-enabled smartphones (nearly 1.5 billion at the end of 2020), and by 2023 their growth is projected to 3.4 billion. Microlearning is gaining a significant rise, which is aimed at: breaking down educational content into small components (independent units); development of individual micro-skills ; independence from individual platforms. In 2019, USD 1.5 billion was invested in this area, and by 2024 it is predicted to reach the mark of USD 3 billion.

Relationship between education and employment is becoming closer, as evidenced by the interest of EdTech industry leaders in career -oriented education. In particular, the American software giant 2U Inc., specializing in educational technology, acquired Trilogy Education (for \$750 billion), which organizes intensive training formats for programming, data analytics and cybersecurity.

There is a close relationship between online learning and the practice of talent development, since today one of the priorities in business is the improvement of soft skills of employees. For 2016, according to Transparency Market Research , global soft development market skills was about \$11.3 billion , and according to forecasts, by 2026 its growth will exceed \$33.7 billion. Huge career-long target

market learning (vocational training), which already reached \$365 billion in 2018, continues to grow rapidly.

Equally in demand are cross-learning practices (p2p-learning), which allow acquiring micro-skills on p2p platforms by finding experts whose competencies are varied based on blockchain technologies. Project-based training is also gaining wide development. Learning (project work), special schools are being created that are guided by this principle. The learning market is growing rapidly management systems (learning management systems), which for 2021 amounted to \$ 13.4 billion, and by 2025 will be \$29.3 billion. The English language education market is developing rapidly, which was measured in 2018 at \$6.8 billion, and growth of \$21.7 billion is projected. by 2025.

An interesting and independent direction is gamification (the use of gaming practices), which is widely used in the Pre K -12 segment, increasing the effectiveness of the educational product. However, its potential is being unlocked gradually, and it is predicted that this is a matter of the future, associated with the search for the most effective models of gamification, as well as the influence of the younger generation. It should be noted that modern powerful companies widely use gamification tools as a powerful tool for employee development, improving business processes, profitability and increasing motivation.

EdTech market is a large, independent and diverse industry with significant potential and remains in the focus of investors. Advances in online education continue to increase the effectiveness of the learning process and influence the strengthening and development of the educational technology market.

### **Challenges and difficulties faced by Russian EdTech companies when entering the international market**

Due to the economic and geopolitical situation in Russia<sup>5</sup> many EdTech

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<sup>5</sup>Vedomosti. Distance education finds points of growth. [E-resource]. Available at: URL <https://www.vedomosti.ru/opinion/articles/2022/07/03/929621-distantcionoe-obrazovanie>

companies are changing their promotion policies and redirecting resources. Poll Smart Ranking in 2022, 55% of respondents planned international expansion, but they had to revise their plans, and 15% of respondents are planning international expansion and are confident that they will be able to implement it <sup>6</sup>(30% of respondents did not plan expansion).

In addition to the difficulties caused by the geopolitical situation, there are other obstacles<sup>7</sup> that EdTech companies face when entering international markets:

1. The need for effective recruitment of the first employees.

Employees must be experts in the market they are going to work in and well connected. Effective partnerships can help ease market entry and are best designed and developed by people with established connections and market experience.

2. The need to spend time testing the product in order to improve market understanding.

There is no more valuable information than a customer's opinion about a product. Macro indicators that are taken into account in market research are important, but testing allows you to check the relevance of indicators and their associated hypotheses. The data obtained can be used in the process of product adaptation and promote the relevant product. It is also necessary to take into account the average purchase cycle depending on the region <sup>8</sup>.

3. Planning and tracking expenses.

This is important if the company plans to enter several markets at the same time. It is necessary to understand what, as well as what you expect in return. This applies to all expenses, including regulatory assistance, marketing, recruitment, and operational service expansion. When planning costs, you need to consider the balance of power and positioning of competitors so that you can capitalize on your

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<sup>6</sup> Edtechs. Rating of the largest companies in the online education market. Results of 2021 and the year and the new reality of 2022. [E-resource]. Available at: URL <https://edtechs.ru/blog/post/itogi-2021-goda-i-novaya-realnost-2022>

<sup>7</sup> Brighteye Ventures. International expansion in EdTech: budgets, barriers and blueprints [E-resource]. Available at: URL <https://www.brighteyevc.com/post/international-expansion-in-edtech-budgets-barriers-and-blueprints>

<sup>8</sup> VC.RU. Entering the international market: prospects for EdTech, first steps and possible mistakes [E-resource]. Available at: URL <https://vc.ru/marketing/395244-vyhod-na-mezhdunarodnyy-rynok-perspektivy-dlya-edtech-pervye-shagi-i-vozmozhnye-oshibki>

strengths and their weaknesses.

4. Building relationships between the central team and the satellite team should be a priority.

Relationships between teams should be based on trust and be given priority. From the very beginning, strong social bonds must be built among themselves, and the opinions of the members of the satellite team must be taken into account in the decision-making process of the central team. This is important for maintaining and developing organizational culture.

When a company enters the global market, it is necessary:

- Along with key statistics on the labor market and education systems, it is necessary to study the culture of the country and region;
- It is necessary to focus on establishing connections in the new market before the official entry into it;
- Conduct a proper competitor analysis to understand how to capture their market share as quickly as possible;
- Hire more local staff at the start of the company in order to properly build marketing.
- Focus on a limited number of markets as one product can fit one market;
- Evaluate and analyze markets based on Internet data ;
- Hire an experienced regional manager for market research and further work;
- Try to hire a team of employees in a new market as early as possible so that you can scale quickly.

### **Prospects for further exit of Russian EdTech companies to the international market**

The beginning of the special military operation adjusted the plans of

companies to enter international markets or develop products in other countries. Difficulties arose for companies that planned to scale their business in foreign countries or signed contracts, but did not have time to register a company and open bank accounts. The plans developed by Russian EdTech companies in 2021 have undergone adjustments: the expansion of companies is much slower than planned, and some companies have reoriented to markets in other regions. Representatives of A. Partners celebrated expansion to the markets of Brazil and India, Robbo talked about buying a franchise in the UAE, Saudi Arabia, Germany and Malaysia, Rebootica entered the Indian market and suggests considering Southeast Asia and Latin America for expansion, Like Center moved to Argentina <sup>9</sup>. The founders of Qacademy sold their business in Russia to Skyeng , launched a new Refocus project <sup>10</sup> in Indonesia and the Philippines , and plan to expand to Thailand , Vietnam, and Malaysia. IThub is going to develop business in Israel, Indonesia, Uzbekistan, Kyrgyzstan and Cyprus.

Some of the most popular areas of EdTech projects of companies in foreign markets can be:

- training according to the requests of the employer ( apprenticeship model )
- coaching sessions for employees and managers
- online courses for hobbies (playing musical instruments, singing) or learning useful skills (driving, cooking)
- vocational training, mentoring and employment assistance,
- language training in different formats (marathons, individual lessons)
- corporate training for skills in demand on the market
- online courses from the best universities in the world
- online higher education programs from the world's leading universities
- preparation for international language tests

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<sup>9</sup> Edtechs. Rating of the largest companies in the online education market. Results of 2021 and the year and the new reality of 2022. [E-resource]. Available at: URL <https://edtechs.ru/blog/post/itogi-2021-goda-i-novaya-realnost-2022>

<sup>10</sup> Forbes . How the founders of Qmarketing sold the EdTech business in Russia and launched an analogue in [Asia analog-v-azii](#)

- job preparation services
- services for creating online courses
- digital skills and competencies training services
- higher education in online format (relevant for Latin American countries)
- exam preparation services
- educational platforms for students, homework help and study materials
- mental health platforms

To build a strategy for entering a foreign market, a SWOT analysis of a Russian EdTech company was carried out, indicating the factors of the internal and external environment of the organization.

Components of a SWOT analysis	Possibility	Threats
	A. Entering new segments and markets	a. Changing needs and tastes of customers
	B. Opportunity to move to a group with a better market position	b . Unfavorable government policy
	B. Accelerating the Growth of EdTech market	d. Adverse demographic changes
	D. Extension of service line	e. Possibility of new competitors
Strengths		
Sufficient financial resources	Increase in market share (A, B, C, D)	Carrying out continuous monitoring of consumer requests using focus groups, A / B tests (a)
Popularity as a market leader	Consolidation of the position in the market as a	Development of the marketing department, strengthening of
Availability of innovative technologies and the possibility of their implementation	Increase in market share (A, B, C, D)	Carrying out continuous monitoring of consumer requests using focus groups, A / B tests (a)
Outstanding Competence in Creating Customer Value	Increase in market share (A, B, C, D)	
Poor understanding of the market	Management system optimization (B, C)	Perfect study of the laws and search for the best ways for the development of companies (b)

Based on the needs of the market, the most priority areas for the

development of Russian EdTech companies were identified: development and updating of the product in accordance with the demands of the foreign market and its trends; looking for new clients; development of the most effective modern system of work with clients and customer service; increase in sales volumes due to new customers. This can be achieved in different ways:

1. To increase the sale of services, it is necessary to conduct international marketing research to identify additional sales markets, advertising campaigns for buyers, send advertising campaigns about products to customers, study the needs of sales markets, identify the strengths and weaknesses of competitors, systematically implement measures to improve quality;

2. Improve the organizational structure of the company, adapting it to the conditions of work in foreign markets: it is necessary to carefully determine the needs of the company; for the right choice of an international marketing strategy, it is very important to formulate goals in the expansion process (they must be specific, concrete, measurable, achievable, realistic, and also result -oriented ); the advantages and disadvantages of each of the strategies should be carefully considered and correlated with the needs of the organization; allocate funds for the development and implementation of marketing (advertising) activities.

### **Recommendations for Russian EdTech -companies on expansion to the global market**

Based on the recommendations of experts representing Russian EdTech companies, the following recommendations are made for the expansion of Russian products to foreign markets:

1. Carry out a general analysis of the region and country where the company plans to enter the market. When conducting an analysis, it is necessary to consider GDP per capita, clarify what means of access to the network are used, the percentage of people who use the Internet, Internet speed, digital skills, etc. Experts advise to pay attention to the markets of developing countries, because. it

is easier to enter them than to the markets of developed countries. Among the regions, you can pay attention to the markets of Latin America, Southeast Asia, Africa, and the Middle East.

2. Conduct a general analysis of the landscape of the EdTech market, competing companies, large transactions in the EdTech venture market. Consider the issue of financing and access to money, fundraising opportunities .

3. To identify product requirements, conduct market research and test among potential customers in order to get feedback and understand what market niche should be taken, what level of education and goals the client has. This will allow you to think over the strategy and make a decision on the product, optimize and adapt it for mass launch.

4. To study the history, cultural background , mentality, work standards of the inhabitants of the country whose market the company will enter. This will simplify communication with employees who will come to work for the company, and will allow you to understand the desires and values of potential customers.

5. Find business partners - a strong team in the country where the product launch is planned. This team will help you register a legal entity, deploy infrastructure, open an office, arrange banking services, launch advertising. You can also find a Russian-speaking naturalized citizen who can help with entering the market.

A common piece of advice for those who plan to enter the international market is to launch a finished product immediately abroad without testing it in Russia, if the company has a goal of development in international markets. This requires a reliable team, knowledge of a foreign language and the ability to relocate (for example, as an EBAC online ). As an alternative to launching a product on the international market, you can consider searching for business partners or buying a finished product (as was the case with [Skillbox and Mentorama](#) )

## **Conclusion**



Expansion is an important step for a company seeking to enter international markets with its projects and services. Russian EdTech massively rushed to foreign markets: in the third quarter of 2021, the company's revenue amounted to about 1.4 billion rubles. At the time of 2021, the Russian online adult education market accounted for just over 1% of the global market (\$3 billion from the estimate in Chapter 1 against \$255 billion of the global EdTech market )<sup>11</sup>. But if earlier companies consciously sought to enter the international market and considered it as a point of growth, now entering the international market may become necessary for the existence of the company. In the third quarter of 2022, compared to the third quarter of 2021, the revenue of many companies fell (for some by 1%, for others by 2-3 times), but for some representatives of EdTech it increased several times. “The ambiguous situation with the dynamics of foreign revenue shows that, although the Russian EdTech has also suffered compared to last year, the road to foreign markets is not closed for Russians.”<sup>12</sup> Among the regions, you can pay attention to the markets of Latin America, Southeast Asia, Africa, and the Middle East.

A well-designed and step-by-step plan for entering a foreign market will allow the company to avoid the difficulties that EdTech companies face when entering international markets. The company should pay special attention to finding a regional manager and hiring a team of local employees who will know the market from the inside, analyze the market and conduct a project test to collect feedback from potential users, conduct competitor analysis, clearly track spending and search for project funding sources.

Online education and new technologies are the areas that will have a great impact on the development of education. Global trends in this market, namely: increase in population in developing countries; growth in demand for educational services; increasing the efficiency of the educational process; the rapid spread of

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<sup>11</sup> Netology. Research of the Russian online education market 2021 and trends of 2022 from industry leaders. [E-resource]. Available at: URL [https://netology.ru/edtech\\_research\\_2022](https://netology.ru/edtech_research_2022)

<sup>12</sup> Edtechs. Rating of the largest companies in the online education market. Russian edtech expansion in the era of the special operation [E-resource]. Available at: URL <https://edtechs.ru/blog/post/russian-edtech-expansion>

distance learning, etc. stimulate the growth of investment activity in EdTech . For EdTech companies, the segments of both children's (additional programs) and adult (FVE, corporate programs) education will be a priority.

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