EDUTECH AFRICA REPORT: 2025

DATE: DECEMBER 2026

LOCATION: HARARE (and the fractured digital landscape of the continent)

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COVER ART DESCRIPTION

A collage, violently assembled. A cracked smartphone screen displaying a fluctuating line graph that looks more like a heart monitor in distress. Behind it, a faded photograph of a crowded, dilapidated classroom overlaid with glowing, Augmented Reality mathematical symbols that don't quite fit the perspective.

The title, "STATE OF EDUTECH IN AFRICA 2025," is scrawled across the top in what looks like spray paint and blood, dripping down onto a map of the continent where fibre optic cables coil like snakes. In the bottom corner, a small, pixelated figure of a child holds up a tablet like a shield against an oncoming storm of binary code.

PREFACE: THE VIEW FROM THE SMASHED WINDOW

December 2026. We stand a year past the date tattooed on this report's forehead. Looking back at 2025 from the vantage point of now is like staring into a broken mirror; the image is refracted, distorted, a dozen different realities screaming at once.

The "State" of Edutech? It's not a state. It's a spasm. A convulsion of hope and despair, of silicon dreams crashing against the hard rock of infrastructure deficits. We are writing this from Harare, from Lagos, from Nairobi, from the spaces in between where the signal flickers and dies.

> "This is not a polite analysis for a boardroom in Geneva. This is an autopsy of a living thing, a chronicle of the hustle, the hype, and the raw hunger for knowledge in the digital age."

SECTION 1: THE SCREAM OF THE STATISTICS

$724.6B	$7.3B	$19.2B	500+
Global EdTech 2035	**Africa EdTech 2025**	**Projected by 2034**	**Startups Fighting**
The runaway train destination	A trickle in the desert	The promise versus pavement gap	Screaming to be heard

The numbers are out there, floating in the ether, taunting us. They tell us the global EdTech juggernaut is a runaway train, destined for a **USD 724.6 billion** station by 2035, powered by a **14.5% CAGR** from this year onwards. A feast of capital. A banquet of valuation.

And here we are. Africa. A continent with an education market worth over **USD 80 billion**, a sleeping giant with pockets full of holes. The investment? A trickle in the desert. The risk-averse vultures of global finance look at us and see only political ghosts and economic quicksand.

Sure, there are bright spots. The market clawed its way to **~USD 7.3 billion in 2025**, a number that feels both monumental and microscopic. But what do these percentages mean to a student in rural Malawi waiting for a webpage to load on a shared 3G connection? The statistics are a neon sign flashing in a power outage. They promise a feast while we fight over crumbs. The gap between the projection and the pavement is where the real story lives–in the **~500+ startups** screaming to be heard, with 64% desperately trying to fix a broken K-12 system while the youth unemployment bomb ticks.

SECTION 2: THE HARDWARE GRAVEYARD & THE HUMAN RESURRECTION

1

Device Dumping Era

Well-meaning donors parachute hardware into schools. Tablets become expensive doorstops. No power. No internet. No training. Just plastic corpses littering the continent.

2

The Painful Shift

From access to readiness. The realization dawns: teachers are not obstacles to bypass, but the **beating heart** of the entire operation.

3

CESA 26-35

Continental Education Strategy screams for teacher development. Policy catches up to reality on paper, at least.

4

New Models Emerge

Hardware bundled with solar power, teacher training, low-bandwidth offline-first content. The human element fights back against the machine.

We finally learnt the lesson, didn't we? The hard way. The year 2025 was the gravesite for "device dumping." The shift, painfully slow but undeniable, has been from *access* to *readiness*. The most successful models now are the ones that treat teachers as co-creators. It's the difference between a graveyard of gadgets and a classroom where a single, shared smartphone running **Eneza Education** becomes a portal for five million minds. The human element is fighting back against the machine, and it's winning.

SECTION 3: ALGORITHM BLUES & THE NEW LITERACY

Old Literacy: Dead

A-B-C and 1-2-3. In some regions, **90% of children** couldn't read simple text by age 10.

New Literacy: Survival

Spotting deepfakes. Questioning AI hallucinations. Critical thinking in the age of algorithms.

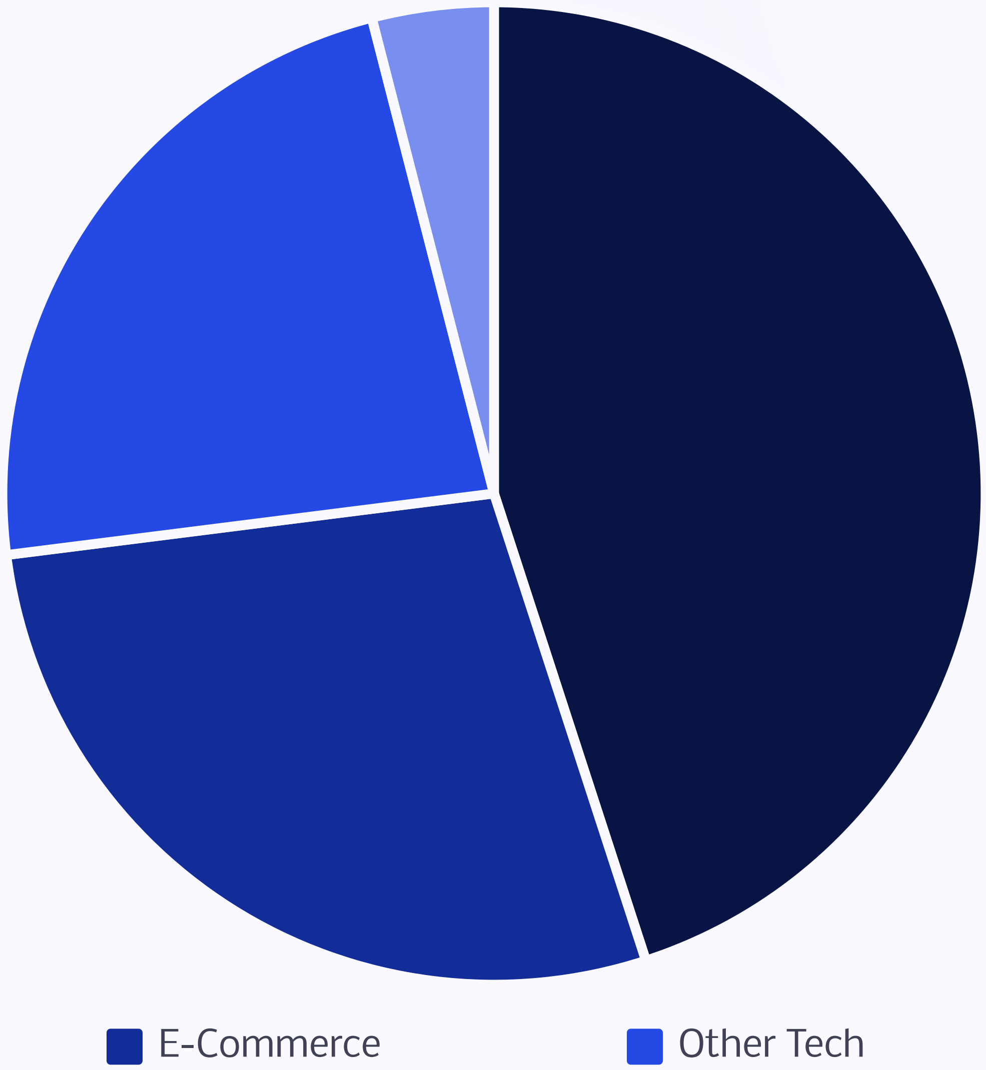
African AI: Rising

Agents on edge devices generating content in Wolof, Yoruba, Swahili. Not just grammar lessons from London.

AI and Machine Learning are here, no longer science fiction. The tech is boosting productivity, yes, but it's also a terrifying mirror. The curriculum is trying to catch up, a slow beast chasing a Ferrari. But the real innovation isn't imported AI–it's **agents on edge devices** generating educational content in mother tongues. It's research papers on arXiv about AI for African languages, not just grammar lessons from abroad.

It's the **AUDA-NEPAD EdTech 2030 Plan** trying to standardise this chaos into a continent-wide scaffold. But the classroom reality? It's a daily battle to teach a child how to think critically when the very tools they use are designed to do the thinking for them. We are building the plane whilst flying it through a digital hurricane, and the co-pilot is an algorithm we don't fully understand, trained on data that doesn't know our names.

SECTION 4: THE HUNGER GAMES OF CAPITAL

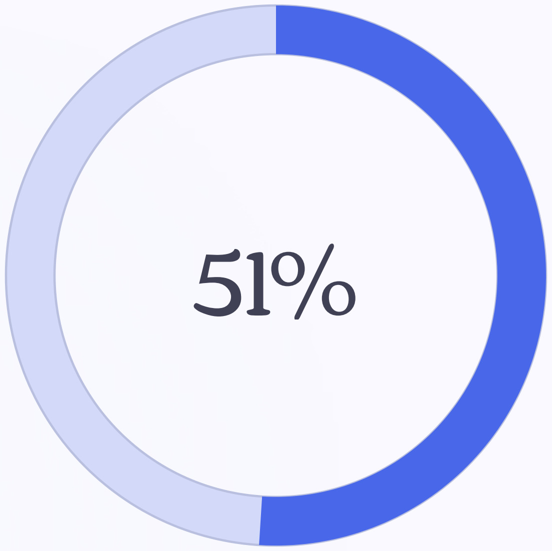


The VC landscape is not a market; it's a colosseum. The big money has their chosen champions. They pour millions into the fintech-adjacent, the easily scalable, the ones with founders who speak the right language at the right cocktail parties.

For the rest? It's starvation. EdTech scrapes for a meagre **~4% of all tech startup funding** in Africa–dwarfed by fintech, swallowed by e-commerce. The financing gap is a chasm filled with the bones of good ideas. The fragmented market, the regulatory nightmares, the sheer difficulty of scaling across 54 different countries–it scares off the faint-hearted.

> Programmes like the Mastercard Foundation's equity-free fellowships are a lifeline, a brief respite in the desert, but they are not enough to feed the army of innovators. We have a few well-fed lions and a continent of starving mice.

SECTION 5: THE INFRASTRUCTURE ILLUSION

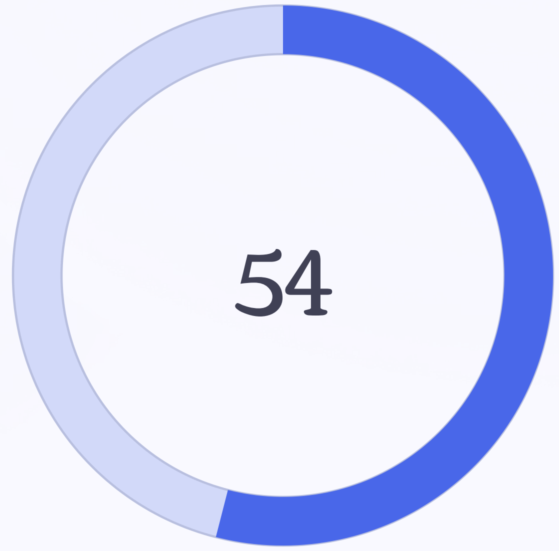


Mobile Internet 2025

Penetration crawled to this number –but does it feel different in rural areas?

Submarine Cables

Already docked. Beautiful, expensive infrastructure from a distance.



Different Countries

The scaling nightmare that scares investors away

The Promise

- Submarine cables connecting the continent
- Government noise about fibre expansion
- Talk of universal connectivity
- Dreams of 5G coverage

The Reality

- No electricity in schools
- No affordable, reliable signal in villages
- Digital divide becoming a canyon
- Thirsting for stable 3G whilst promised 5G

They talk about the cables. Oh, how they love to talk about the cables. It's all a beautiful, expensive hallucination from where we sit. The infrastructure gap is the knee on the neck of EdTech adoption. You can have the best AI-powered learning platform in the world, but if the school has no electricity and the village has no affordable, reliable signal, it's just code decaying on a server somewhere in Europe.

Projects promise universal connectivity whilst the **AUDA-NEPAD 2030 plan** quietly prioritises **solar-powered, offline-capable tech** as a survival mechanism. We are drowning in promises of 5G whilst thirsting for a single, stable bar of 3G. The future is here, they say. It's just not evenly connected.

CONCLUSION: THE UNFINISHED SENTENCE

The Scream

A **Ferrari engine strapped to a donkey cart**. A handful of brilliant, resilient innovators fighting a war against apathy, corruption, and a lack of basic wiring.

The Prayer

Ubongo reaching millions with cartoons that teach maths, **FoondaMate** squeezing lessons through WhatsApp, **local AI agents** whispering lessons in a mother tongue on a device that doesn't need the cloud.

The Hunger

A generation of young people–**98 million out of school, 72 million untrained and unemployed**–hungry for the future, tearing down the gates of knowledge with whatever tools they can get their hands on.

So, what is the "State" of Edutech in Africa at the end of 2026? It is a scream and a prayer. It is a generation refusing to wait for permission, building their own ladders out of code and determination.

> The report is not finished because the reality is not finished. The ink is still wet, and it's mixed with sweat, tears, and the cold light of a smartphone screen in a darkened room. The signal is weak, but we are still broadcasting.

- END OF REPORT -

Data Core: The Bones Beneath the Prose

Market Size

~USD 7.3bn (2025)

Projected **USD 19.2bn** by 2034 (IMARC Group)

Startup Ecosystem

~500+ startups

64% focused on K-12 (Education Africa Mag, IT-Online)

Funding Gap

Captures only **~4%** of all African tech VC funding (IT-Online)

Connectivity Challenge

Mobile internet penetration **~51%** in 2025, but vast urban-rural disparities persist (BCG)

Policy Framework

AUDA-NEPAD's EdTech 2030 Vision & Plan active, CESA 26-35 emphasising teacher development

Human Scale

98 million children out of school in SSA, **72 million youth** untrained and unemployed (IT-Online)